

TEXAS A&M RESEARCH FOUNDATION
TEXAS A&M UNIVERSITY SYSTEM HEALTH SCIENCE CENTER RESEARCH FOUNDATION
PRAIRIE VIEW A&M RESEARCH FOUNDATION

March 31, 2007

To: Principal Investigators
From: Texas A&M Research Foundation
Subject: On-Line Access to Project Account Statements

You are now able to access your Research Foundation project account statements on-line. Many Principal Investigators have requested the ability to have on-line access to their project account information. CANOPY software provides user-friendly access to your account information in FAMIS. The account information is updated on a real-time basis. You will need a FAMIS logon identification to access your project account information. Attached are instructions explaining how to access your account information if you already have a FAMIS logon identification or how to get a FAMIS logon identification if do not already have one.

- Follow the instructions under PART A, if you currently access your accounts in campus code 99 (TAMRF).
- Follow the instructions under PART B, if you have a FAMIS logon identification, but you do not have access to campus code 99 (TAMRF).
- Follow the instructions under PART C, if you do not have a FAMIS logon identification.

We encourage all Principal Investigators to use this on-line process for accessing your financial project account information. For the next three months, April, May and June, as you get use to accessing your project account information on-line, the Research Foundation will continue to mail you a copy of your project account information. **If you want to continue to receive a paper copy of your project account information after June 30, 2007 please contact Diane McDonald by e-mail at: DRM@rf-mail.tamu.edu** or by phone at 845-8703.

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PART A

If you can currently access your accounts in campus code 99 (TAMRF), you can also access your accounts through CANOPY.

1. Go to <http://canopy.tamu.edu>
2. Type in your FAMIS ID and password
3. Select Campus Code 99-Texas A&M Research Foundation
4. Select Account Inquiry (FRS)

There are many search options available and the data can be presented in several different formats.

You may view your account summary, open commitments, transactions, and vouchers by using the tabs below. The data presented is real time. Below is a sample of the Canopy presentation.

The screenshot shows the top navigation area of the CANOPY system. On the left is the CANOPY logo with the text 'The Texas A&M University System'. On the right are navigation buttons for 'FRS (99)', 'Home', and 'Logout'. Below these are tabs for 'MyAccounts', 'Attributes', 'Summary', 'Open Comm', 'Transactions', and 'Vouchers'. A 'HELP ?' button is located on the far right. A red text prompt says 'Please click here to try NEW CANOPY'.

Thru Month: Active FY:

Search Accounts

Search by Account #: Search by Dept: SubDept:

Search by Resp Person (last, first): Search by Title:

Show Support Accounts: Show Deleted Accounts:

My Accounts

	Account	Description	Revenue BBA	Expense Budget	Expense Actual	Expense Encumbrance	Exclude from Bottom Line	Net BBA	Unprotected Available
								0.00	0.00
<input type="button" value="Remove"/>	123445	Account not valid in FY: 2007	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="button" value="Remove"/>	555955	PROCEDURES TO ASSESS THE HAZAR	0.00	1,004,560.77	1,004,560.77	0.00	0.00	0.00	0.00
	77887	SITE-IMAGE ANALYSIS	0.00	94,102.02	94,102.02	0.00	0.00	0.00	-198.00

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PART B

IF YOU HAVE A FAMIS LOGON ID, BUT YOU DO NOT HAVE ACCESS TO RESEARCH FOUNDATION:

Please go to this website and complete a TAMRF FAMIS Access request form.

<http://rf-web.tamu.edu/>

The request form is located in the "FORMS" link.

Please send the completed request to:

Michele Lacey

mlacey@rf-mail.tamu.edu

3578 TAMU

Fax #: 979-862-3250

Phone#: 979-862-4444 – Please call if you need assistance in completing the form.

You may expect your RF access in 4 working days, once the form is received.

PART C

IF YOU DO NOT HAVE A FAMIS LOGON ID:

Please contact your member's FAMIS Security Officer.

You can find the Security Officer for your campus at this website:

<http://www.tamus.edu/offices/famis/requests/secadmins.aspx>

Please ask your FAMIS Security Officer to forward a copy of your FAMIS Access Request to:

Michele Lacey

mlacey@rf-mail.tamu.edu

3578 TAMU

Fax #: 979-862-3250

Phone#: 979-862-4444

You may expect your RF access in 4 working days, once the form is received.