1. Log on to Canopy (username and password will be the same as FAMIS
https://apps2.system.tamus.edu/CanopyTwo/Login.aspx.

2. Go to FRS – DBR – Create DBR
The next screen you get will be this:

**Description:** Type your Dept. Code (ex: Budget (BUDG) along with anything else you need to title your document.

**DBR Create**

Doc ID: **NEW**

Description:

Select a Justification from the drop down menu.

If you are transferring from one account to another, select OT.
Source of Funds: Where you’re pulling the funds from
Type in the total amount you are transferring out, the account (or select from ‘Select a Favorite Account’ in the drop down menu) and budget pool (Sub code)
Tab over to “Destination of Funds” (Where funds are being transferred into)

Source of Funds
Total Amount: $0.00
Account: Select a Favorite Account List is empty. OR type in an account number:
Subcode:

If you have multiple Fund Sources you will need to do separate DBR’s

Destination of Funds (where the funds are going into): Type in the account, pool (subcode) and amount

<table>
<thead>
<tr>
<th>Account</th>
<th>Subcode</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>02</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>03</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>04</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>05</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>06</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>07</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>08</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>09</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Total Destinations Amount $0.00

The Total Destinations Amount must match the Total Amount you entered in Source of Funds line. If they do not you will get this message:

ERROR: Dollar amount does not match
Click "Create Document"

Document will look like this:

Departmental Budget Request

**DBR Document:** U100553 (DBR report)
**Routing Document:** BUDG - transfer between accounts
**Summary:** OTHER (SEE NOTES) (OT)
**Justification:**

**Created Date:** 01/20/2011
**Last Update Date:**

**Attachments:** Add Attachments

This is your document number; you can use this to search for the document at a later time.

You can attach approvals or back up.

To Send a copy of the document when it is completely approved go to **Completed FYIs Recipient**:

Name (last, first): Search

Save Cancel

To Add Notes go to **DBR Notes**:

* Previous notes from today may be available for editing

Save Cancel
For everything you add you must always click **SAVE**

Select **CLOSE** from the **DBR Action** Drop Down Menu and Submit. No changes can be made to the document at this point. Select **Route for Approval** (If you do not Route the document will stay in your box) and click submit.

If you created the document by mistake or you no longer want to make a transfer, you may cancel it. Go to **DBR Action** and select **Cancel**. Check the box and click **Submit**.

**Instructions to Approve a DBR document**

1. Log into Canopy
2. Go to Routing and select Inbox.
3. Click on the document and review it to make sure everything is correct.
4. In the Routing Action drop down menu, select Approve.
5. Click Submit

*Note: Select another option if you wish to recall the document or reject it. Always click **submit** after selecting any of the options.*
Instructions to Search for a DBR document in Canopy

1. Log in to Canopy
2. Click FRS and select DBR -DBR Search
3. Enter the DBR document number beginning with the letter ‘U’.
4. Click Submit.

If you know the DBR #

Main Menu  DBR Document  DBR Search

DBR Document Number:  DBR Action:

Submit

If you do not know the DBR number but you know the account number....

1. Click on FRS —DBR—DBR Search
2. Type in the account number you are looking for in the account number box.
3. All the transactions made to that account number will appear.
You can also go to your outbox and select the document

**To Recall a Document**

Go to your Outbox

<table>
<thead>
<tr>
<th>Document</th>
<th>Status</th>
<th>Action</th>
<th>Action Date</th>
<th>Summary</th>
<th>Account</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>EWR150632508</td>
<td>In Proc Rq</td>
<td>Forward/FY1</td>
<td>01/20/2011 2:25 PM</td>
<td>EWR: Rosana Rojas - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632563</td>
<td>In Proc Rq</td>
<td>Forward/FY1</td>
<td>01/20/2011 2:16 PM</td>
<td>EWR: Deanna Novosad - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632542</td>
<td>In Proc Rq</td>
<td>Forward/FY1</td>
<td>01/20/2011 2:11 PM</td>
<td>EWR: Elyseh Orelane - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632539</td>
<td>In Proc Rq</td>
<td>Forward/FY1</td>
<td>01/20/2011 2:11 PM</td>
<td>EWR: Amanda Glenn - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632537</td>
<td>In Proc Rq</td>
<td>Forward/FY1</td>
<td>01/20/2011 2:11 PM</td>
<td>EWR: Jessica Franis - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632509</td>
<td>In Proc Rq</td>
<td>Forward/FY1</td>
<td>01/20/2011 2:09 PM</td>
<td>EWR: Andres Gutierrez - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632493</td>
<td>In Proc Rq</td>
<td>Forward/FY1</td>
<td>01/20/2011 2:06 PM</td>
<td>EWR: Vacant - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632390</td>
<td>Final</td>
<td>Forward/FY1</td>
<td>01/20/2011 11:46 AM</td>
<td>EWR: Vacant - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632351</td>
<td>Final</td>
<td>Forward/FY1</td>
<td>01/20/2011 10:09 AM</td>
<td>EWR: Vacant - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150631514</td>
<td>Final</td>
<td>Forward/FY1</td>
<td>01/20/2011 10:00 AM</td>
<td>EWR: Shumeng Wang - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>EWR150632136</td>
<td>Final</td>
<td>Forward/FY1</td>
<td>01/20/2011 10:00 AM</td>
<td>EWR: Andrew Trombley - Wage Position</td>
<td><em>see doc</em></td>
<td></td>
</tr>
<tr>
<td>DBR150632550</td>
<td>In Proc Rq</td>
<td>Approved/FY1</td>
<td>01/20/2011 9:58 AM</td>
<td>Clear Deficit in 200130</td>
<td><em>see doc</em></td>
<td>1.49</td>
</tr>
</tbody>
</table>

I:\Budget2\Trainings\Canopy and Business Obj\Canopy and DBR Training\DBR Training-MA
Recall a Document

Select the document and from the Routing Action menu select "Recall"
It will prompt you for a note where you can type "to change fund source, correct budget pcol, etc"

The document will be in you Inbox (If the document you created has been rejected please follow these steps as well to make the necessary corrections

Click on Document

Click on the document again
Recall a Document

Select "Reopen to Edit" and Click Submit

After you make your revisions, click close and submit and then route and submit.

Rejecting Documents

Select Reject to Creator/ Type Reason for Rejecting and click submit