PRAIRIE VIEW A&M UNIVERSITY

Departmental Budget Request (DBR)

Office of Budgets & Reconciliations

Training Topics

- By the end of the session you will know how to:
  - Access Canopy
  - Log into Canopy
  - Create a Departmental Budget Request (DBR)
    - Budget Transfer
    - Budget Increase/Decrease

Training Topics

- – Close a Departmental Budget Request (DBR)
- – Route a Departmental Budget Request (DBR) for approval
- – Review and Approve a Departmental Budget Request (DBR)
- – Locating a Departmental Budget Request (DBR)

CANOPY ACCESS

- **HOW TO ACCESS CANOPY**
  - Approved Account Profile
  - Canopy Internet Address
    - Production: **https://apps2.system.tamus.edu/CanopyTwo/Login.aspx**
    - Training: **https://apps2.sago.tamus.edu/CanopyTwo/Login.aspx?ReturnUrl=%2fCanopyTwo%2fDefault.aspx**

CANOPY LOG-IN

- ## HOW TO LOG-IN

  @ Canopy Login Homepage - The Texas A&M University System:

  - Enter your FAMIS User Id
  - Enter your Password
  - Click "Login"

PRAIRIE VIEW A&M UNIVERSITY

CANOPY

WEB ENABLED BPP/FAMIS

Canopy Login - The Texas A&M University System

FAMIS User Id: [_____] •

Password: [_____] •

[Login]

This computer system and data herein are available only for authorized purposes by authorized users. Use for any other purpose may result in administrative/disciplinary actions or criminal prosecution against the user. Usage may be subject to security testing and monitoring. Applicable privacy laws establish the expectations of privacy.

For additional information please see:
http://cis.tamu.edu/security/tos/

Change Password

Click here to go to Training version

What is A Departmental Budget Request (DBR)?

- A Departmental Budget Request (DBR) is an electronic request to move budget (or funds) from one account (source) pool to another account (destination) pool.

- The DBR replaces the paper Budget Request Form.

Identifying the Budget Pool

- A Budget Pool is a specified object code/category where available budget is summarized.
  - FAMIS Screen 19
  - Canopy
    - Account Summary Screen

Canopy

The Texas A&M University System

Campus: PVAMU - TRAINING CAMPUS (PV) ▾ Fiscal Year: 2008 ▾ Set CC/FY

HELP? >>>> FEEDBACK

INFO: You have **5** items in your Inbox.

Available Modules

▶ EPA - Personnel Action Module

▶ FFX - Fixed Assets Module

▶ FRS - Financial Reporting Module

▶ Routing - Document Routing Module

▶ System - System Settings and General Information

Canopy, a Business Computing Services application.
The Texas A&M University System
Version: 1/25/2008 11:29:11 AM

Top of Page

Theme: Neon Blue ▾ Set Theme
Turn Paging Off

Budget Pools
1000 - $45,726.00
1511 - $ 2,000.00

```
 019 SL 6 Digit List with Category Totals
                    OFFICE OF BUDGETS & RECONCILIATIONS

   Screen: ___    Account: 110240 ____    Fiscal Year: 2008
  Thru Month: 2_   February        FY/PY/IN to Date: FY       Zero Balance: N
 Resp Person: RICKS, BETTY A                  Bottom Line Exclusion:
 Department: OBAR   Flags: D F B C Z G ABR           Net Dir BBA:
   Map Code: 11000        N N Y R N   014   Unprotected Available:
 Obj    Description           Budget        Actual    Encumbrances   Available
 ----  ------------------   ------------  ------------  ------------  ------------

 1000 All Expense Pool          45726                                     45726
 1105 Salary Encumbrance        20000                      20000
 1511 Unallctd Salaries Po       2000                                      2000
 **** Total All Expense Po      67726                      20000          47726

 **** Total Expenses            67726                      20000          47726




 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                              DLoad Left  Right
```

EPA	FFX	FRS	Routing	System

Campus: PVAMU - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

Main Menu ⇨ FRS ⇨ Account ⇨ Summary   ⟫ FEEDBACK

**Budget Pools
1000 - $45,726.00
1511 – $ 2,000.00**

to Account Search	MyAccounts	Attributes	Summary	Open Comm	Transactions	Payroll	Reports

Account: **110240 OFFICE OF BUDGETS & RECONCILIATIONS**   Dept: **OBAR Office Of Budgets & Reconciliations**   Freeze: No
Responsible Person: **Ricks, Betty A**   Sub-Dept: Delete: No

Select an account: [List is empty. ▼] or type in an account number: 110240 💡

Thru Month: Feb ▼   Year Type: FY ▼   SL Display: Summary by Obj. Code ▼

[Submit]

SL Account Summary

Object Code	Description	C	P	Budget	CM Actual	Actual	Encumbrance	Available
1000	All Expense Pool			$45,726.00	$0.00	$0.00	$0.00	$45,726.00
1105	Salary Encumbrance			$20,000.00	$0.00	$0.00	$20,000.00	$0.00
1511	Unallctd Salaries Pool-Non-Teachg			$2,000.00	$0.00	$0.00	$0.00	$2,000.00
****	Total All Expense Pool			$67,726.00	$0.00	$0.00	$20,000.00	$47,726.00
****	Total Expenses			$67,726.00	$0.00	$0.00	$20,000.00	$47,726.00

prev 1 next   (Showing page 1 of 1, items 1-5)   **Total items: 5**

Change page: 1 **Go** Page size: 25 **Change**

Canopy, a Business Computing Services application.
The Texas A&M University System

Top of Page

Theme: Neon Blue ▼   Set Theme
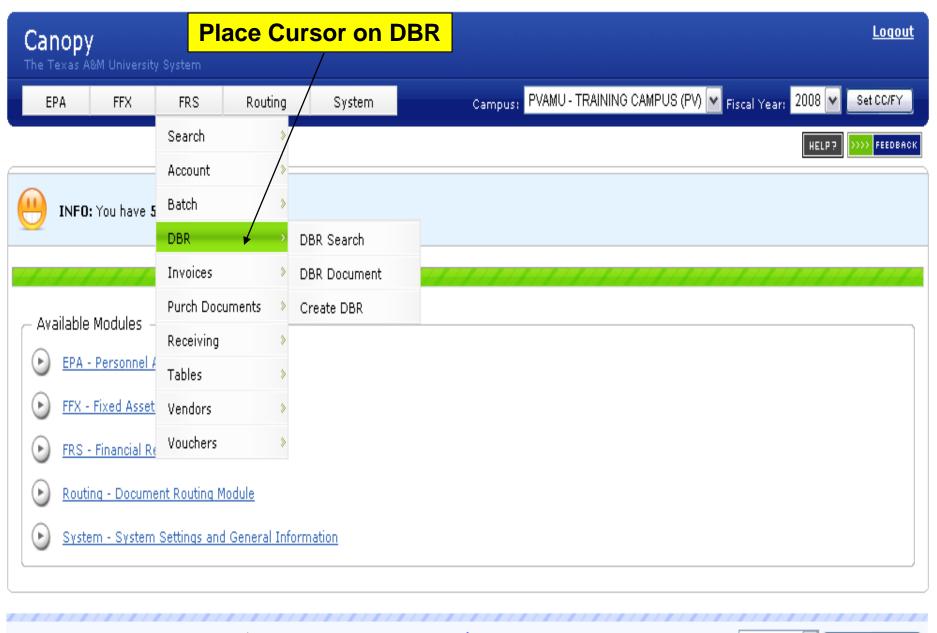
Done   🌐 Internet   🔍 100%

Create: Budget Transfer

- ## Place cursor on
  - ### FRS – Financial Reporting Module
    - Click DBR
    - Click Create New DBR

Place Cursor on DBR

Canopy
The Texas A&M University System

Logout

| EPA | FFX | FRS | Routing | System |

Campus: PVAMU - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

HELP?   >>>> FEEDBACK

Search ▸
Account ▸
Batch ▸
DBR ▸   DBR Search
Invoices ▸   DBR Document
Purch Documents ▸   Create DBR
Receiving ▸
Tables ▸
Vendors ▸
Vouchers ▸

INFO: You have 5

Available Modules

▶ EPA - Personnel A

▶ FFX - Fixed Asset

▶ FRS - Financial Re

▶ Routing - Document Routing Module

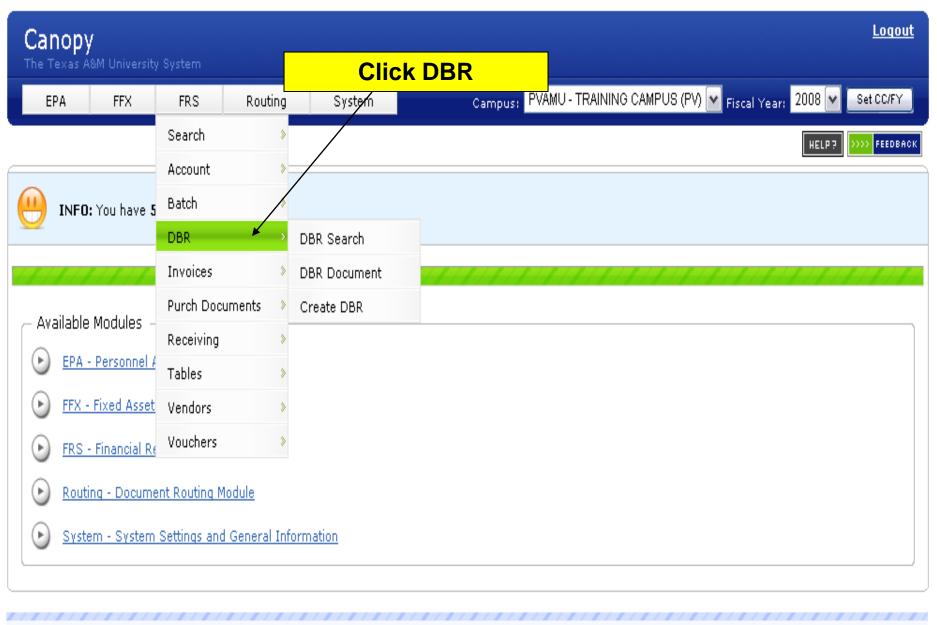▶ System - System Settings and General Information

Canopy, a Business Computing Services application.
The Texas A&M University System
Version: 1/25/2008 11:29:11 AM

Top of Page

Theme: Neon Blue ▼ Set Theme

Turn Paging Off

System - Site Map

Canopy
The Texas A&M University System

Click DBR

| EPA | FFX | FRS | Routing | System |

Campus: PVAMU - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

HELP? >>>> FEEDBACK

Search ▸
Account ▸
Batch ▸
DBR ▸   DBR Search
Invoices ▸   DBR Document
Purch Documents ▸   Create DBR
Receiving ▸
Tables ▸
Vendors ▸
Vouchers ▸

😀 **INFO:** You have 5

Available Modules

▸ EPA - Personnel A

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▸ FRS - Financial R

▸ Routing - Document Routing Module

▸ System - System Settings and General Information

Canopy, a Business Computing Services application.
The Texas A&M University System
Version: 1/25/2008 11:29:11 AM
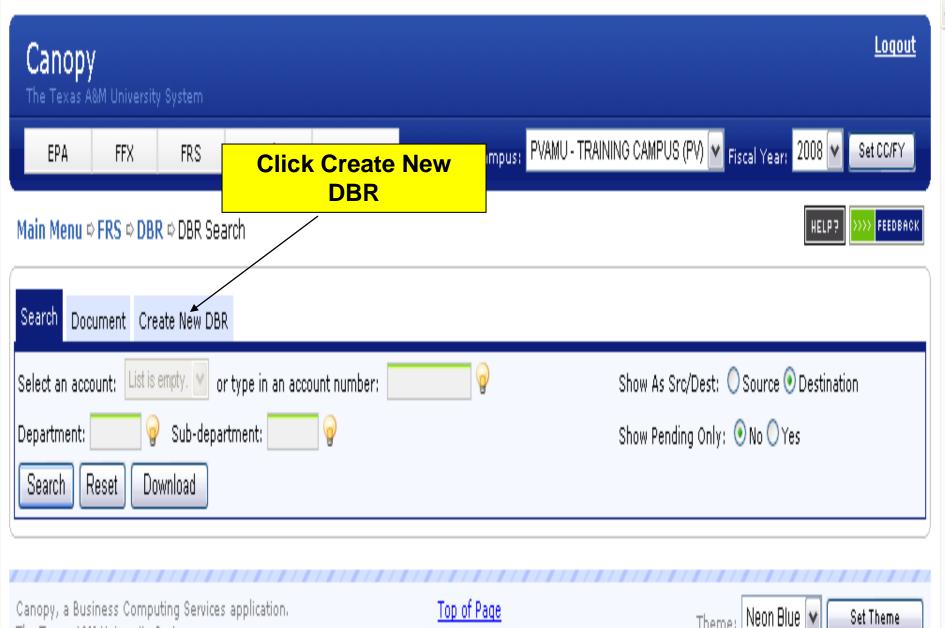
Top of Page

Theme: Neon Blue ▼ Set Theme

Turn Paging Off

System - Site Map

| EPA | FFX | FRS |

...mpus: PVAMU - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

Click Create New DBR

Main Menu ⇨ FRS ⇨ DBR ⇨ DBR Search

HELP? >>>> FEEDBACK

| Search | Document | Create New DBR |

Select an account: [List is empty. ▼] or type in an account number: [   ] 💡   Show As Src/Dest: ○ Source ⦿ Destination

Department: [   ] 💡 Sub-department: [   ] 💡   Show Pending Only: ⦿ No ○ Yes

[Search] [Reset] [Download]

Canopy, a Business Computing Services application.
The Texas A&M University System
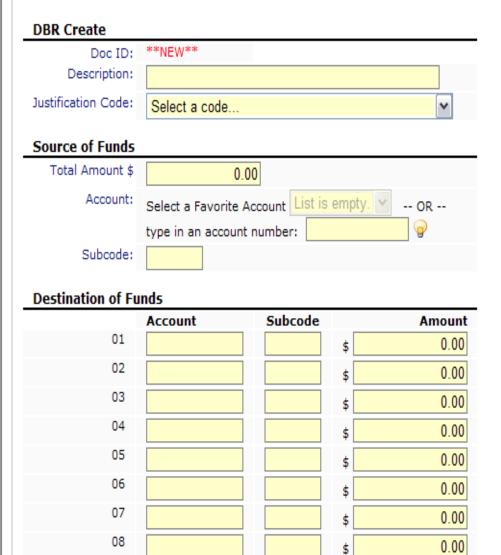Version: 1/25/2008 11:29:11 AM

Top of Page

Theme: Neon Blue ▼ [Set Theme]

[Turn Paging Off]

System - Site Map

DBR Create

Doc ID: **NEW**

Description: [   ]

Justification Code: [Select a code...   ▼]

Source of Funds

Total Amount $ [0.00]

Account: Select a Favorite Account [List is empty. ▼] -- OR --

type in an account number: [   ] 💡

Subcode: [   ]

Destination of Funds

	Account	Subcode		Amount
01	[ ]	[ ]	$	[0.00]
02	[ ]	[ ]	$	[0.00]
03	[ ]	[ ]	$	[0.00]
04	[ ]	[ ]	$	[0.00]
05	[ ]	[ ]	$	[0.00]
06	[ ]	[ ]	$	[0.00]
07	[ ]	[ ]	$	[0.00]
08	[ ]	[ ]	$	[0.00]
09	[ ]	[ ]	$	[0.00]
10	[ ]	[ ]	$	[0.00]
	Total Destinations Amount			$0.00

[Create Document]
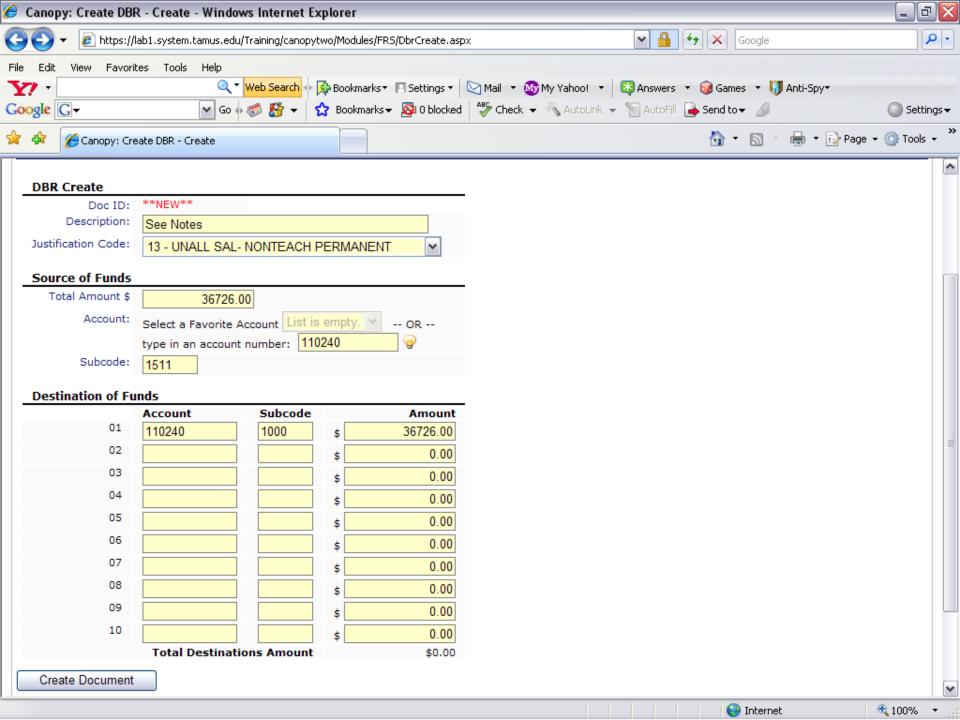
Edit the Header

- Header Includes the following sections
  - DBR Create
    - Description
      - information entered here will show as the DBR summary for the DBR
    - Justification Code
      - Click on the drop down list
        - » All justification codes require additional comments except codes 20 & 21.
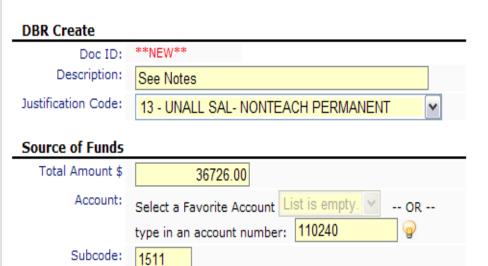
Edit the Header (Continue)

- – Source of Funds
  - The account that is "giving" the funds
    - – Total Amount
    - – Account Number
    - – Sub code
- – Destination of Funds
  - The account that is "receiving" the funds
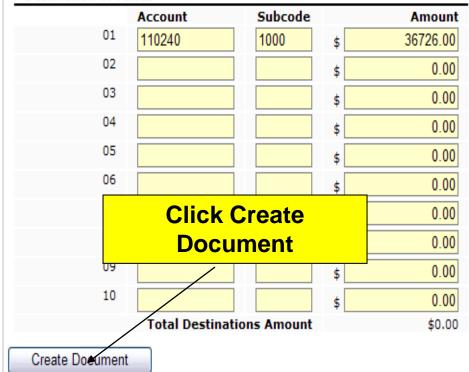   - – Account
    - – Sub code
    - – Amount
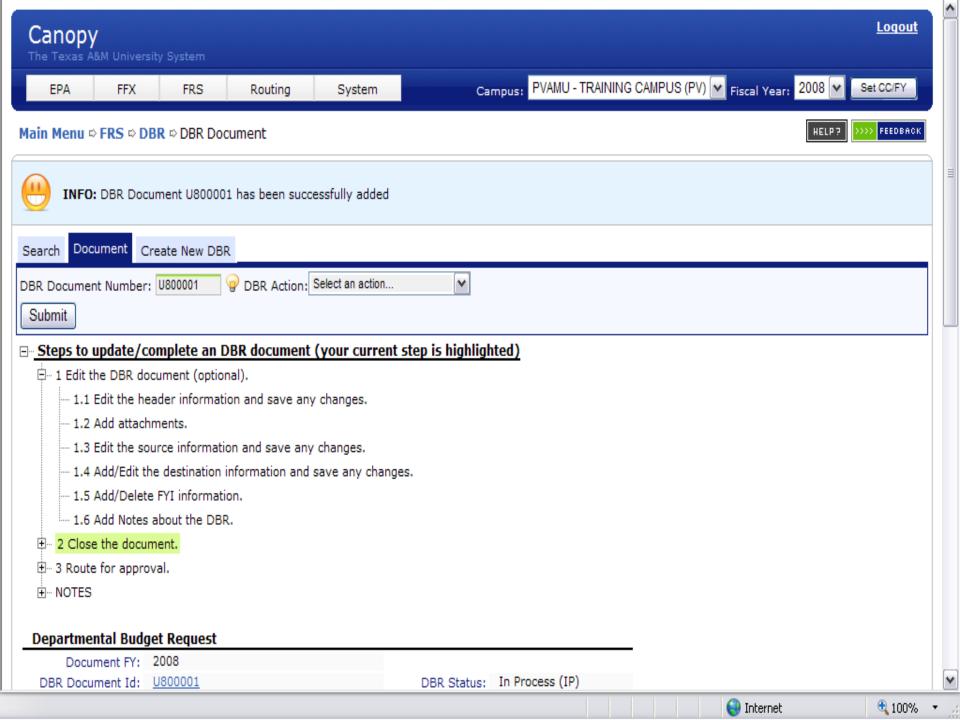
Canopy: Create DBR - Create - Windows Internet Explorer

https://lab1.system.tamus.edu/Training/canopytwo/Modules/FRS/DbrCreate.aspx

Google

File   Edit   View   Favorites   Tools   Help

Web Search   Bookmarks   Settings   Mail   My Yahoo!   Answers   Games   Anti-Spy

Google   Go   Bookmarks   0 blocked   Check   AutoLink   AutoFill   Send to   Settings

Canopy: Create DBR - Create   Page   Tools

DBR Create

Doc ID:	**NEW**
Description:	See Notes
Justification Code:	13 - UNALL SAL- NONTEACH PERMANENT

Source of Funds

Total Amount $	36726.00
Account:	Select a Favorite Account List is empty. -- OR --
	type in an account number: 110240
Subcode:	1511

Destination of Funds

	Account	Subcode		Amount
01	110240	1000	$	36726.00
02			$	0.00
03			$	0.00
04			$	0.00
05			$	0.00
06			$	0.00
07			$	0.00
08			$	0.00
09			$	0.00
10			$	0.00
	Total Destinations Amount			$0.00

Create Document

Edit the Header (Continue)

- Click on Create Document

DBR Create

Doc ID: **NEW**

Description: See Notes

Justification Code: 13 - UNALL SAL- NONTEACH PERMANENT

Source of Funds

Total Amount $ 36726.00

Account: Select a Favorite Account List is empty. -- OR --

type in an account number: 110240

Subcode: 1511

Destination of Funds

	Account	Subcode		Amount
01	110240	1000	$	36726.00
02			$	0.00
03			$	0.00
04			$	0.00
05			$	0.00
06			$	0.00
				0.00
				0.00
09			$	0.00
10			$	0.00
	Total Destinations Amount			$0.00

Click Create Document

Create Document

Internet   100%

EPA	FFX	FRS	Routing	System

Campus: PVAMU - TRAINING CAMPUS (PV) ▾   Fiscal Year: 2008 ▾   Set CC/FY

Main Menu ⇨ FRS ⇨ DBR ⇨ DBR Document

HELP?   >>>> FEEDBACK

INFO: DBR Document U800001 has been successfully added

| Search | **Document** | Create New DBR |

DBR Document Number: U800001   💡 DBR Action: Select an action... ▾

Submit

⊟ **Steps to update/complete an DBR document (your current step is highlighted)**
   ⊟ 1 Edit the DBR document (optional).
       1.1 Edit the header information and save any changes.
       1.2 Add attachments.
       1.3 Edit the source information and save any changes.
       1.4 Add/Edit the destination information and save any changes.
       1.5 Add/Delete FYI information.
       1.6 Add Notes about the DBR.
   ⊞ 2 Close the document.
   ⊞ 3 Route for approval.
   ⊞ NOTES

Departmental Budget Request

Document FY: 2008

DBR Document Id: U800001   DBR Status: In Process (IP)

Internet   100%

Adding Attachments

- Under the Departmental Budget Request Section
  - Click on Edit
  - Select Name
    - Can be selected from drop down list or you can type in your file name
  - Click on Browse
    - To locate the file on your PC
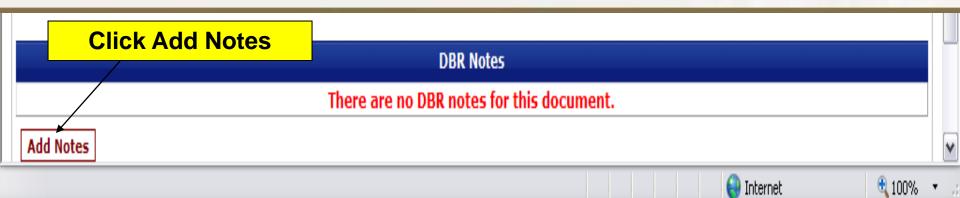
Adding Attachments (Continue)

– Select your file

– Double Click on File or Click Open

– Click on Add Attachment

**If attachments can not be added. You must submit supporting documents to the Budget Office. Write the DBR Number in the top left hand corner on the 1st page of support.

Adding Attachments (Continue)

Departmental Budget Request

Document FY:	2008		
DBR Document Id:	U800001	Status:	Re-Opened (RE)
Route Document Id:	DBRPVU8~~00001~~	Route Status:	Recalled (RC)
Summary:	Permanent Hire - Chestnut	Total:	$36,726.00
Justification:	UNALL SAL- NONTEACH PERMANENT (13)	Dept Ref:	
Created Date:	02/03/2008	Created By:	ALEXANDER, DIANNE T
Last Update Date:	02/04/2008	Last Updated By:	ALEXANDER, DIANNE T
Attachments:			

Attachment Name

Edit

* Your attachment has been added successfully when the name of the attachment is reflected in the "Attachments" field of the DBR.
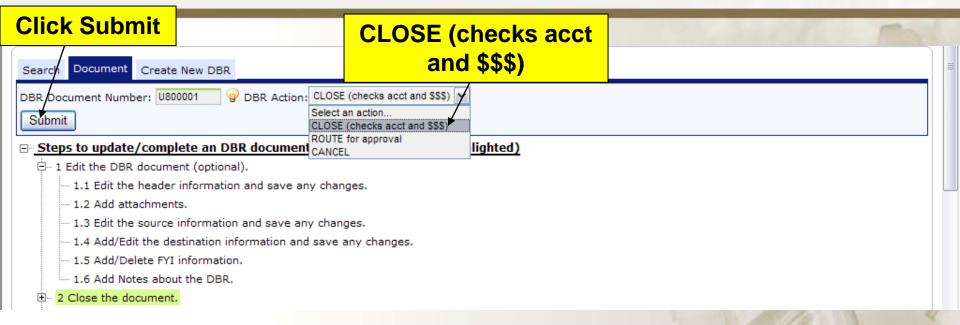
PRAIRIE VIEW A&M UNIVERSITY

Adding Additional Notes

DBR Notes

There are no DBR notes for this document.

Add Notes

Internet   100%

- Click on Add Notes
  - Note box will open for editing
  - Type in notes
  - Click Save

PRAIRIE VIEW A&M UNIVERSITY

Additional Notes (Continue)

FYIs to Destination Recipients

No records found to display.

Add FYI

DBR Notes

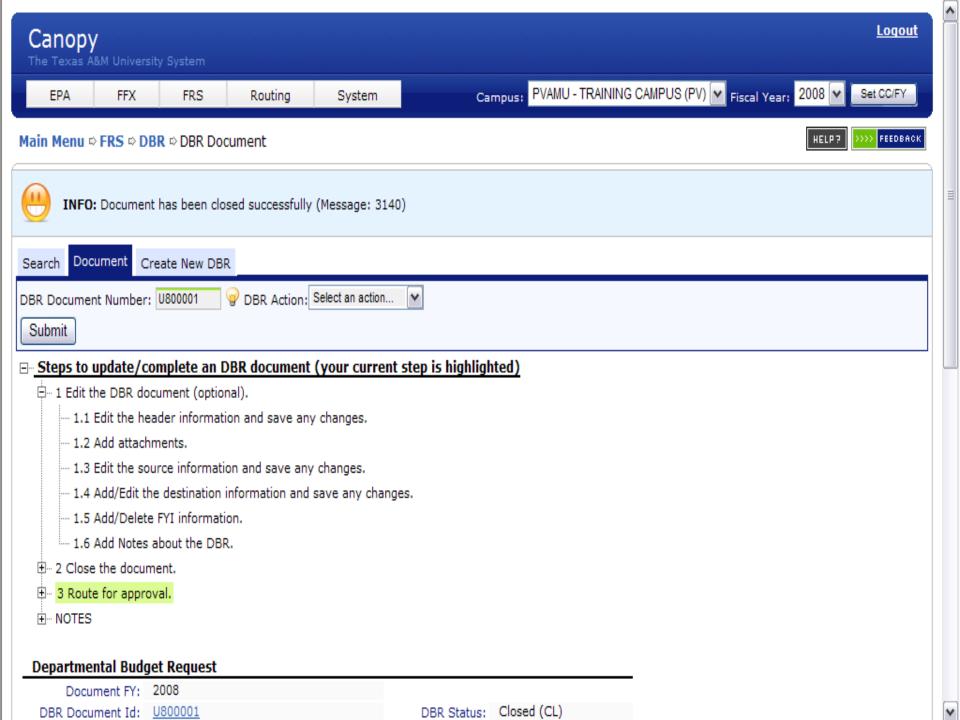| Text |
| --- |
| >>Note entered 02/03/08 by ALEXANDER, DIANNE T
Morris Chestnut, Budget Specialist, Hire Date:02/15/2008 |

Add Notes

Internet   🔍 100% ▾

* Notes have been added successfully when your comment appears in the DBR Notes Section the DBR.

Close The Document
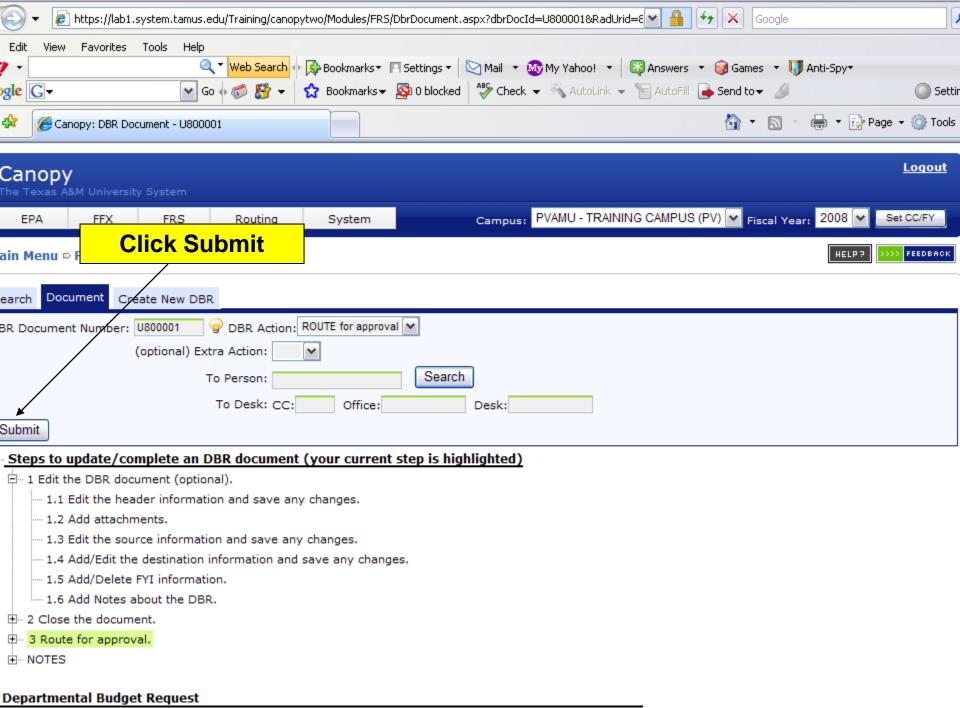
Search | Document | Create New DBR

DBR Document Number: U800001   DBR Action: CLOSE (checks acct and $$$)

Submit

Select an action...
CLOSE (checks acct and $$$)
ROUTE for approval
CANCEL

⊟ **Steps to update/complete an DBR document** lighted)
  ⊟ 1 Edit the DBR document (optional).
    — 1.1 Edit the header information and save any changes.
    — 1.2 Add attachments.
    — 1.3 Edit the source information and save any changes.
    — 1.4 Add/Edit the destination information and save any changes.
    — 1.5 Add/Delete FYI information.
    — 1.6 Add Notes about the DBR.
  ⊞ 2 Close the document.

- DBR Routing Action
  - Select "Close" (checks acct and $$$)
  - Click on Submit

PRAIRIE VIEW A&M UNIVERSITY

EPA	FFX	FRS	Routing	System

Campus: PVAMU - TRAINING CAMPUS (PV) ▾   Fiscal Year: 2008 ▾   Set CC/FY

Main Menu ⇨ **FRS** ⇨ **DBR** ⇨ DBR Document

HELP?   ▷▷▷▷ FEEDBACK

😁 **INFO:** Document has been closed successfully (Message: 3140)

Search	**Document**	Create New DBR

DBR Document Number: U800001 💡 DBR Action: Select an action... ▾

Submit

⊟ **Steps to update/complete an DBR document (your current step is highlighted)**

   ⊟ 1 Edit the DBR document (optional).

      — 1.1 Edit the header information and save any changes.

      — 1.2 Add attachments.

      — 1.3 Edit the source information and save any changes.

      — 1.4 Add/Edit the destination information and save any changes.

      — 1.5 Add/Delete FYI information.

      — 1.6 Add Notes about the DBR.

   ⊞ 2 Close the document.

   ⊞ 3 Route for approval.

   ⊞ NOTES

Departmental Budget Request

    Document FY: 2008

    DBR Document Id: U800001   DBR Status: Closed (CL)

Route the Document

ROUTE for Approval

- DBR Routing Action
  - Select "Route for Approval"
  - Click on Submit

PRAIRIE VIEW A&M UNIVERSITY

Edit   View   Favorites   Tools   Help

Web Search   Bookmarks   Settings   Mail   My Yahoo!   Answers   Games   Anti-Spy

G ▼   Go   Bookmarks   0 blocked   Check   AutoLink   AutoFill   Send to ▼   Settir

Canopy: DBR Document - U800001   Page ▼   Tools

Canopy
The Texas A&M University System

Logout

| EPA | FFX | FRS | Routing | System |

Campus: PVAMU - TRAINING CAMPUS (PV) ▼   Fiscal Year: 2008 ▼   Set CC/FY

Click Submit

ain Menu ⇨ F   HELP?   >>>> FEEDBACK

earch   Document   Create New DBR

BR Document Number: U800001   💡   DBR Action: ROUTE for approval ▼

(optional) Extra Action: [▼]

To Person: [   ]   Search

To Desk: CC: [   ]   Office: [   ]   Desk: [   ]

Submit

Steps to update/complete an DBR document (your current step is highlighted)

⊟ 1 Edit the DBR document (optional).
    1.1 Edit the header information and save any changes.
    1.2 Add attachments.
    1.3 Edit the source information and save any changes.
    1.4 Add/Edit the destination information and save any changes.
    1.5 Add/Delete FYI information.
    1.6 Add Notes about the DBR.
⊞ 2 Close the document.
⊞ 3 Route for approval.
⊞ NOTES

Departmental Budget Request

Document FY: 2008

INFO: Document has been Routed PV DBRPVU800001 (Message: 2519)

Search | Document | Create New DBR

DBR Document Number: U800001 | DBR Action: No action available

Submit

Departmental Budget Request

Document FY:	2008		
DBR Document Id:	U800001	DBR Status:	Closed (CL)
Route Document Id:	DBRPVU800001	Route Status:	In Dept Rt (DR)
Summary:	Permanent Hire - Chestnut	Total:	$36,726.00
Justification:	UNALL SAL- NONTEACH PERMANENT (13)	Dept Ref:	
Created Date:	02/03/2008	Created By:	ALEXANDER, DIANNE T
Last Update Date:	02/03/2008	Last Updated By:	ALEXANDER, DIANNE T
Attachments:			

Source Account Information

Source Account	Object Code	Dept	Sub Dept	Description	Amount
10240-00000	1511	OBAR		OFFICE OF BUDGETS & RECONCILIATIONS	$36,726.00

Destination Account Information

Item	Destination Account	Object Code	Dept	Sub Dept	Description	Amount
	110240-00000	1000	OBAR		OFFICE OF BUDGETS & RECONCILIATIONS	$36,726.00
					Destination Total:	36726.00

FYIs to Destination Recipients

No records found to display.

Create: Budget Increase/Decrease

- Budget Increase/Decrease (Code 21) is defined as any DBR:
  - Where the Source or Destination Account has it's on General Ledger (GL) (Map Code) – Fund Balance Reserve

Locating the GL (Map Code)

- Using FAMIS
  - FAMIS Screen 019 – SL 6 Digit List with Category Totals (SL Account Summary Detail)
  - FAMIS Screen 006 – SL 6 Digit Account (FRS) (SL Account Attributes)
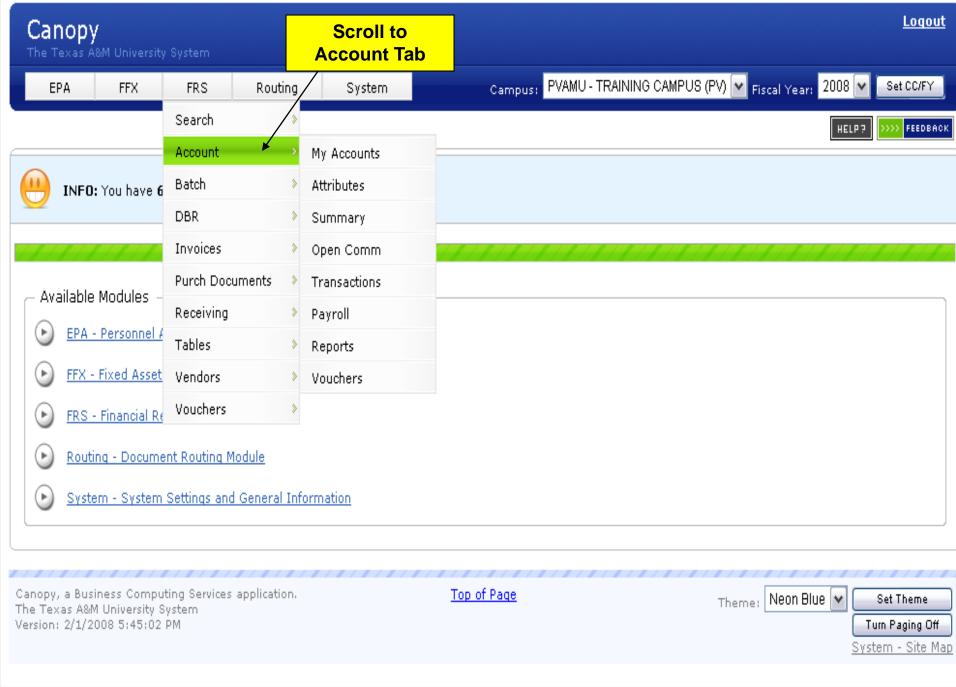
FAMIS SCREEN - 019

GL (Map Code)

FAMIS SCREEN - 006

(GL) Map Code

```
006 SL 6 Digit Account (FSA)                          02/11/08 08:14
                                                       FY 2008 CC 05

  Screen: ___   Account: 332005 ____   MSU ACTIVITIES

  Account Title: MSU ACTIVITIES_____     SA create enable: N
  Resp Person: [REDACTED] RANSOM, STEVEN A       Old Acct: 332005_____
         ABR Rate: 001      Map Code: 32005 Reporting Group: __
  Bottom Line Cntl: Y  Deflt Cat Cntl: R   Deflt Cat Tol Pct: _____
    AFR Fund Group: 30     Fund Group: AX     Sub Fund Group: AX  Sub-Sub: __
  Year-End Process: E   Year-End Acct: _____  Function: 70  Sub-Fun: __
     Default Bank: 00033    Override: Y    Proj FYTD End Mo: 08 Aux Code: OST
  Alternate Banks: ***** _____ _____ _____ _____  Security: _____
     State Funds: _    Appropriated: _            ----SA Transactions---
            Dept   S-Dept Exec Div  Coll Mail Cd Stmt     Budget   Actual
  Primary: SACT_   SACTA   AA   SA   BA  PFISC    Y    Expense: N       N
  Secondary: _____  _____              _____   _   Revenue: N       N


     Fund Source: __  _____
     Long Title: MSU ACTIVITIES_____
                 _____

  Account Letter: _   Setup Date: _____  TRS/ORP Exempt: _
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Hmenu Help  EHelp       Next  CAcct CProj          Left  Right
```
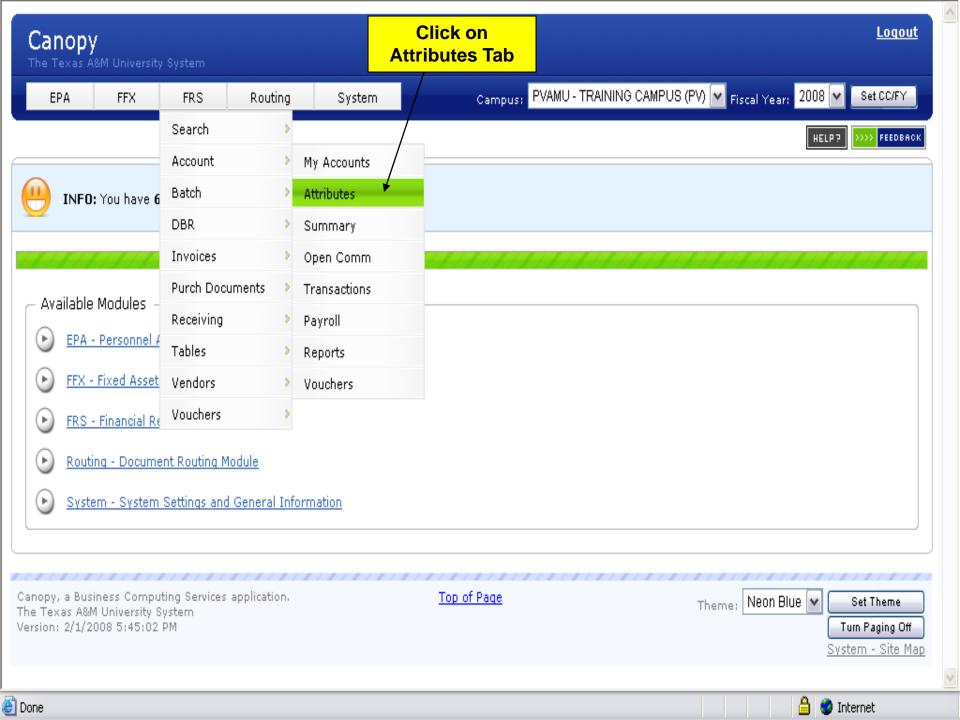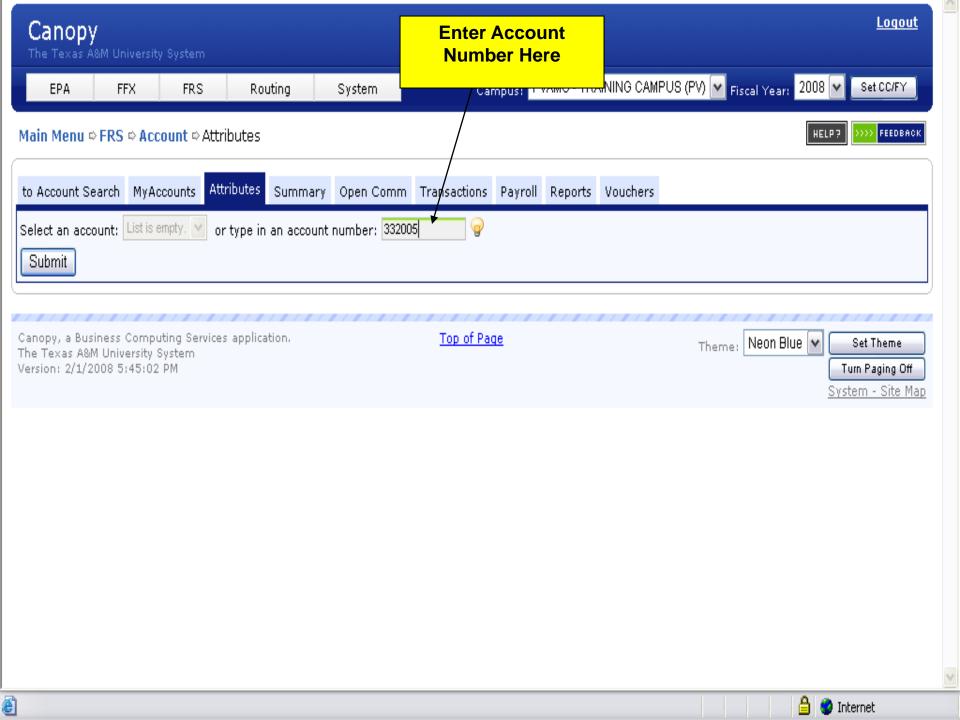
Locating the GL (Map Code)

- Using Canopy
  - Place cursor on FRS
  - Scroll to Account
  - Click on Attributes
  - Under Core Information Section
    - GL (Map Code)

Canopy
The Texas A&M University System

Enter Account Number Here

EPA	FFX	FRS	Routing	System

Campus! PVAMO - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

Main Menu ▷ FRS ▷ Account ▷ Attributes

HELP?   >>>> FEEDBACK

| to Account Search | MyAccounts | Attributes | Summary | Open Comm | Transactions | Payroll | Reports | Vouchers |

Select an account: [List is empty. ▼] or type in an account number: [332005] 💡

[Submit]

Canopy, a Business Computing Services application.
The Texas A&M University System
Version: 2/1/2008 5:45:02 PM

Top of Page

Theme: [Neon Blue ▼] [Set Theme]
[Turn Paging Off]
System - Site Map

🔒 🌐 Internet

Canopy

Click Submit

Logout

| EPA | FFX | FRS | Routing | System |

Campus: PVAMU - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

HELP? >>>> FEEDBACK

Main Menu ⇨ FRS ⇨ Account ⇨ Attributes

| to Account Search | MyAccounts | Attributes | Summary | Open Comm | Transactions | Payroll | Reports | Vouchers |

Select an account: List is empty. ▼ or type in an account number: 332005 💡

Submit

Canopy, a Business Computing Services application.
The Texas A&M University System
Version: 2/1/2008 5:45:02 PM

Top of Page

Theme: Neon Blue ▼ Set Theme

Turn Paging Off

EPA	FFX	FRS	Routing	System

Campus: PVAMU - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

Main Menu ▷ FRS ▷ Account ▷ Attributes

HELP?   >>>> FEEDBACK

| to Account Search | MyAccounts | Attributes | Summary | Open Comm | Transactions | Payroll | Reports | Vouchers |

Account: **332005 MSU ACTIVITIES**   Dept: **SACT Student Activities**   Freeze: No
Responsible Person: **Ransom, Steven A**   Sub-Dept: **SACTA Student Activities**   Delete: No

Select an account: List is empty. ▼   or type in an account number: 332005 💡

Submit

GL (Map Code)

Core Information

Account Title:	MSU ACTIVITIES	Freeze Flag:	N
Responsible Person:	Ransom, Steven A 516-00-0259	Drop Flag:	N
Resp Accountant:		Delete Flag:	N
Map Code:	32005	SA Create Enable:	N

Account Hierarchy

	Department	Sub De...	...ec Level	Division	College	Mail Code	Statement
Primary:	SACT	SACTA	AA	SA	BA	PFISC	Y
Secondary:							

SA Transactions

	Budget	Actuals
Expense:	N	N
Revenue:	N	N

Financial Reporting

AFR Fund Group:	30	Function:	70	Element of Cost:	
Fund Group:	AX	Sub Function:		Sub Element of Cost:	
Sub Fund Group:	AX	Aux Code:	OST	Effort Category:	ISTA

Internet

DBR – Using Fund Balance (GL)

- DBR Create
  - Description
    - information entered here will show as the DBR summary for the DBR
  - Justification Code
    - Click on the drop down list
      - » All justification codes require additional comments except codes 20 & 21.

DBR – Using Fund Balance (GL)

- Source of Funds
  - GL (Map Code) 32005
    - Total Amount
    - Account Number
      - 032005 (add the number "0" to the beginning of map code)
    - Sub code
      - Not required for this DBR

DBR – Using Fund Balance (GL)

- – Destination of Funds
  - Account
    - – 332005
  - Sub code
    - – 1000
  - Amount
- Click on Create Document

DBR Create

Doc ID: ****NEW****

Description: Homecoming Expenses

Justification Code: 23 - TRANSFER - NON-SALARY SUPPORT

Source of Funds

Total Amount $: 3000.00

Account: Select a Favorite Account | List is empty. | -- OR --

type in an account number: 032005

Subcode:

Destination of Funds

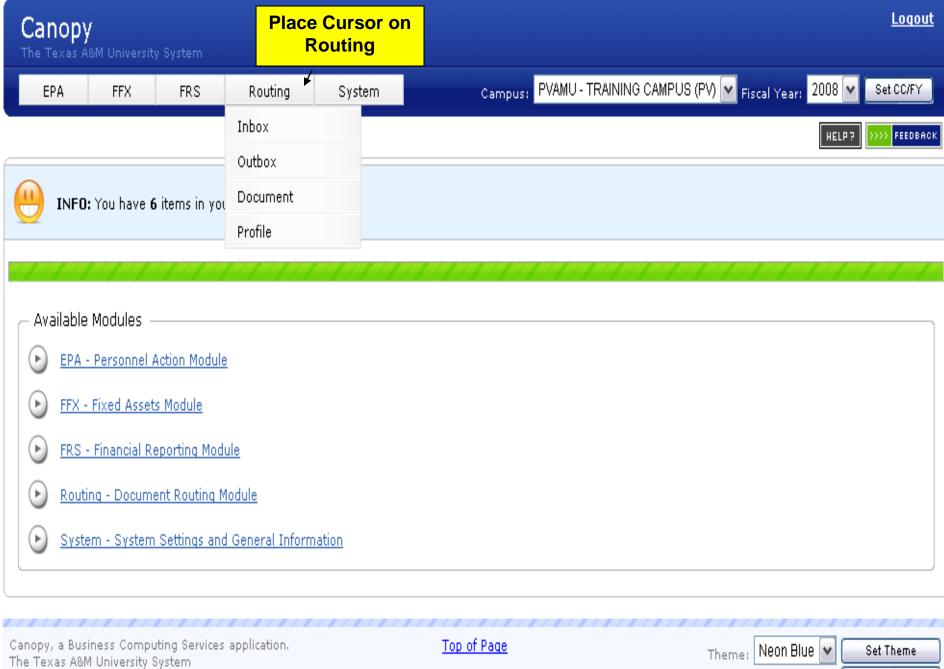|	Account	Subcode		Amount
01	332005	1000	$	3000.00
02			$	0.00
03			$	0.00
04			$	0.00
05			$	0.00
06			$	0.00
07			$	0.00
08			$	0.00
09			$	0.00
10			$	0.00
	Total Destinations Amount			$3000.00

Create Document

Steps to Complete a DBR

- Click on Create Document
- Add Attachments
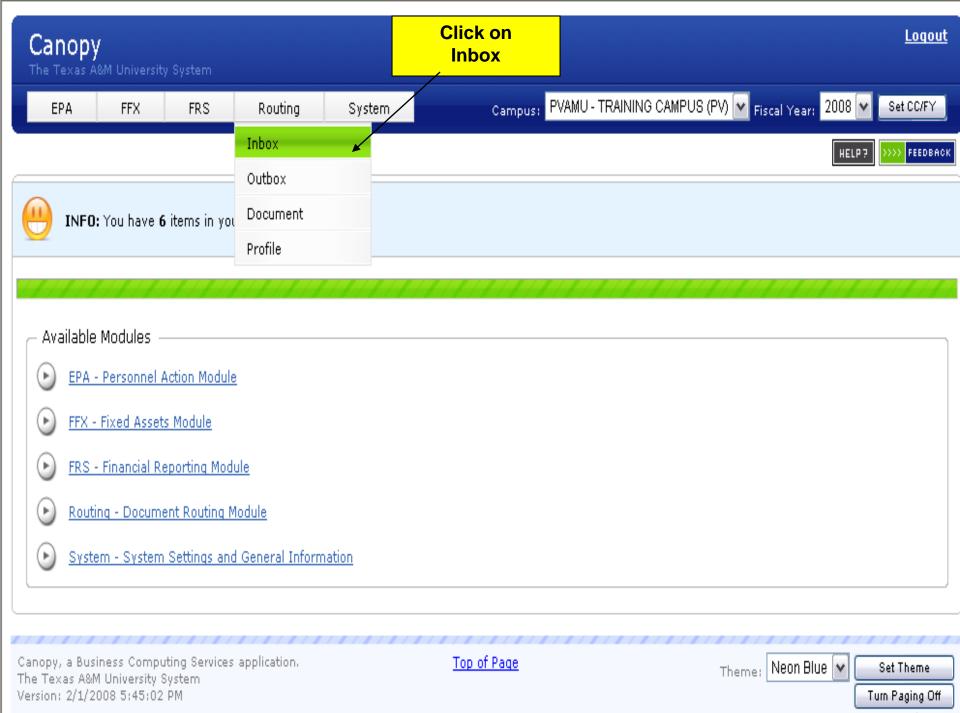- Add Additional Notes (If applicable)
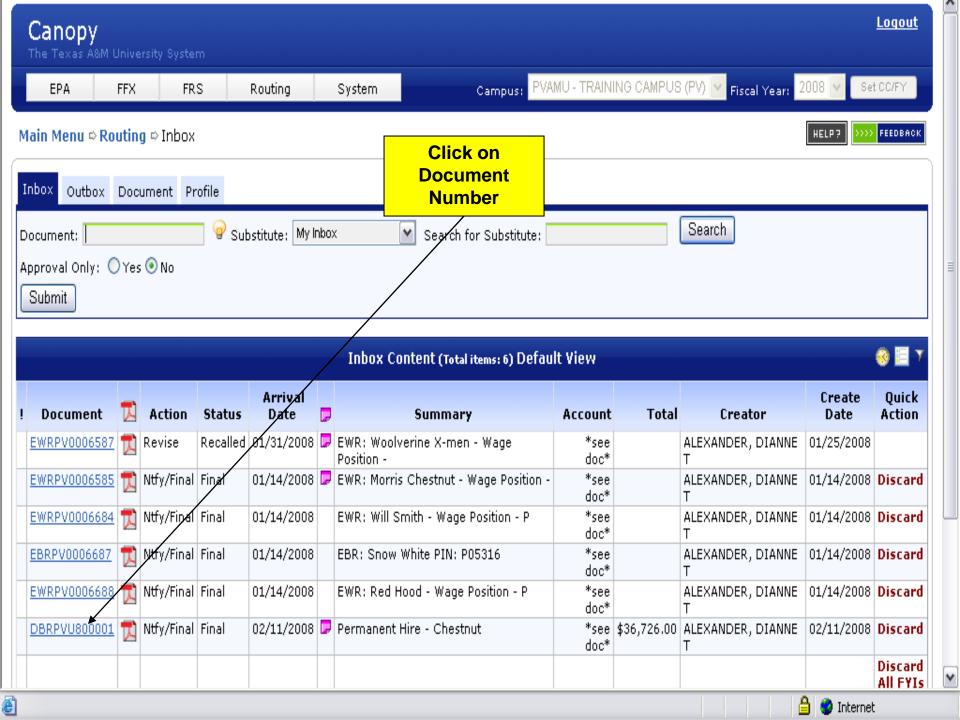- Close
- Route

DBR - Primary Approver

- Canopy Main Menu
  - Place Cursor on Routing Tab
  - Click on Inbox
  - Click on the DBR Document number

Canopy
The Texas A&M University System

Place Cursor on Routing

| EPA | FFX | FRS | Routing | System |

Campus: PVAMU - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

- Inbox
- Outbox
- Document
- Profile

HELP? >>>> FEEDBACK

INFO: You have **6** items in you

Available Modules

▶ EPA - Personnel Action Module

▶ FFX - Fixed Assets Module

▶ FRS - Financial Reporting Module

▶ Routing - Document Routing Module

▶ System - System Settings and General Information

Canopy, a Business Computing Services application.
The Texas A&M University System
Version: 2/1/2008 5:45:02 PM

Top of Page

Theme: Neon Blue ▼ Set Theme

Turn Paging Off

System - Site Map

EPA	FFX	FRS	Routing	System

Campus: PVAMU - TRAINING CAMPUS (PV) ▼ Fiscal Year: 2008 ▼ Set CC/FY

Main Menu ⇨ Routing ⇨ Inbox

HELP?   >>>> FEEDBACK

Click on Document Number

Inbox	Outbox	Document	Profile

Document: [   ] 💡 Substitute: My Inbox ▼ Search for Substitute: [   ] Search

Approval Only: ○ Yes ● No

Submit

Inbox Content (Total items: 6) Default View

!	Document		Action	Status	Arrival Date		Summary	Account	Total	Creator	Create Date	Quick Action
	EWRPV0006587	📄	Revise	Recalled	01/31/2008	📝	EWR: Woolverine X-men - Wage Position -	*see doc*		ALEXANDER, DIANNE T	01/25/2008	
	EWRPV0006585	📄	Ntfy/Final	Final	01/14/2008	📝	EWR: Morris Chestnut - Wage Position -	*see doc*		ALEXANDER, DIANNE T	01/14/2008	Discard
	EWRPV0006684	📄	Ntfy/Final	Final	01/14/2008		EWR: Will Smith - Wage Position - P	*see doc*		ALEXANDER, DIANNE T	01/14/2008	Discard
	EBRPV0006687	📄	Ntfy/Final	Final	01/14/2008		EBR: Snow White PIN: P05316	*see doc*		ALEXANDER, DIANNE T	01/14/2008	Discard
	EWRPV0006688	📄	Ntfy/Final	Final	01/14/2008		EWR: Red Hood - Wage Position - P	*see doc*		ALEXANDER, DIANNE T	01/14/2008	Discard
	DBRPVU800001	📄	Ntfy/Final	Final	02/11/2008	📝	Permanent Hire - Chestnut	*see doc*	$36,726.00	ALEXANDER, DIANNE T	02/11/2008	Discard
												Discard All FYIs

Internet

DBR – Substitute Approver

- Following previous instructions to access your Inbox
- In the Search Field
  - Type the name of the primary approver
  - Click on search
  - Click on drop down arrow
  - Select the primary approver name

DBR – Substitute Approver

- Select the primary approver name
- System will auto-fill your selection in the Substitute field
- Click Submit
- Click on the DBR Document Number
- Review
- Select Appropriate Routing Action
- Click Submit

Budget Office Contact Information

- For more Information on Creating DBRs , please contact:

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PRAIRIE VIEW A&M UNIVERSITY