



# Setting Up A DBR In Canopy

1. To set up a DBR in Canopy, access the Canopy module and enter the ID and password that you use for FAMIS.



A screenshot of the Canopy login page. It features two input fields: 'FAMIS User Id:' and 'Password:'. Below the password field is a blue 'Login' button. To the right of the input fields is a block of text: '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.' Below this text is a link: 'For additional information please see: <http://es.tamu.edu/security/bs/>'. At the bottom left, there is a 'Change Password' link. At the bottom center, there is a link: 'Click here to go to Production version'.

2. Select the FRS tab.
3. Then select DBR and "Create DBR".
4. Document ID enter "new".

A screenshot of the 'DBR Create' form in the Canopy system. The form has several sections: 'DBR Create' with fields for 'Doc ID', 'Description', and 'Justification Code'; 'Source of Funds' with a 'Total Amount' field and a 'Subcode' field; and 'Destination of Funds' which is a table with columns for 'Account', 'Subcode', and 'Amount'. The table has 10 rows, with the last row labeled 'Total Destinations Amount' and a value of '\$0.00'. There is a 'Create Document' button at the bottom.

5. In the Description field enter the reason for the transfer not the mechanics. An acceptable description is For Year 2011 expenses.
6. Enter your justification code from the drop-down menu.
7. Enter the amount.
8. Review the acceptable transfers on FAMIS screen 528.
9. Enter your Source account number with sub-codes if any.
10. Enter the Destination account with sub-codes if any. You can have up to 10 destination accounts.
11. Enter your Notes describing the expense and FYI's if any.
12. Review it for errors,
13. Close and route.