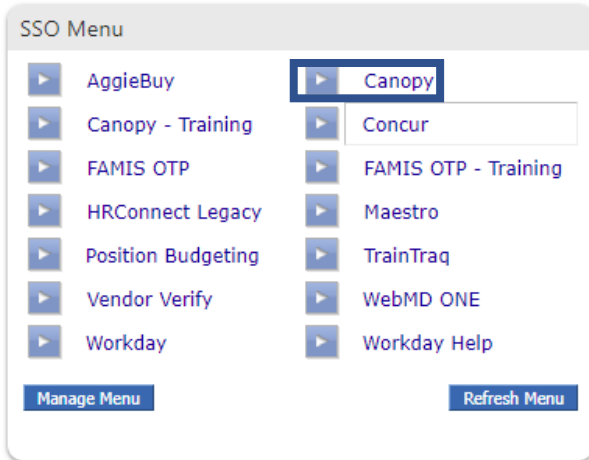
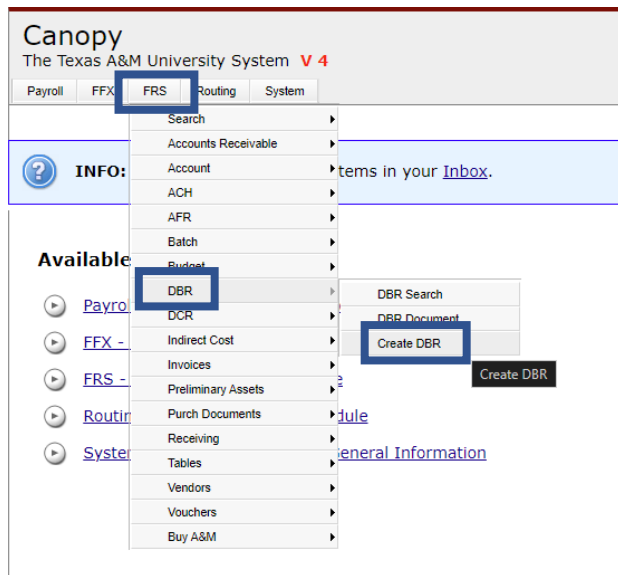


How to Submit a Document Budget Request (DBR)

Log in to **Canopy** from your SSO Menu.



Locate the **FRS** drop-down option. Select **DBR** and hover over to **Create DBR**.



How to Submit a Document Budget Request (DBR)

Fill in the blank yellow areas. You will need to put the **Description** of the DBR and the **Justification Code** along with the **Total Amount, Account Number, and Subcode**. Under **Destination of Funds**, you will enter the **Account Number** you would like to your funds to transfer to. Enter **Subcode** and the **Amount**. Click **Create Document**.

Main Menu ▾ FRS ▾ DBR ▾ Create DBR

DBR Search DBR Document Create DBR

DBR Create

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

Description: Pool Transfer
 Justification Code: OT - OTHER (SEE NOTES)

Source of Funds

Total Amount \$ 444.45
 Account: Select a Favorite Account Select an account... -- OR --
 type in an account number: 20049920150
 Subcode: 3000

Destination of Funds

	Account	Subcode	Amount
01	20049920150	1100	\$ 444.45
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			\$444.45

Create Document

If you need to fund several accounts from the same source of funds, you may enter the account information under the second line.

Add FYI

Notes - Record has been successfully added (Message: 0002)

Text

>>Note entered 10/25/24 by BROWN, DAHLIA B
 Pool transfers.

Add Notes

How to Submit a Document Budget Request (DBR)

Under the **DBR Action** drop down menu, select **CLOSE (checks acct and \$\$\$)**, then hit **Submit**.

Main Menu ▾ FRS ▾ DBR ▾ DBR Document

DBR Search | DBR Document | Create DBR

DBR Document Number: U500511 | DBR Action: Select an action... ▾

Submit

Select an action

- CLOSE (checks acct and \$\$\$)
- ROUTE for approval
- ROUTE with Extra Action
- CANCEL

Departmental Budget Request

Document FY: 2025

DBR Document: U500511 (DBR Report) | DBR Status: In Process (IP)

Routing Document: | Route Status:

Summary: Pool Transfer | Total: \$444.45

Justification: OTHER (SEE NOTES) (OT) | Dept Ref:

Created Date: 10/25/2024 | Created By: Brown, Dahlia B

Last Update Date: | Last Updated By:

Attachments:

Name	Added Date	Added By	Deleted Date	Deleted By
NO ATTACHMENTS FOUND				

+ Add Attachments

Edit

Once you hit submit, you will see a **notification** as shown below.

Main Menu ▾ FRS ▾ DBR ▾ DBR Document

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

DBR Search | DBR Document | Create DBR

DBR Document Number: U500511 | DBR Action: Select an action... ▾

Submit

Departmental Budget Request

Document FY: 2025

DBR Document: U500511 (DBR Report) | DBR Status: Closed (CL)

Routing Document: | Route Status:

Summary: Pool Transfer | Total: \$444.45

Justification: OTHER (SEE NOTES) (OT) | Dept Ref:

Created Date: 10/25/2024 | Created By: Brown, Dahlia B

Last Update Date: 10/25/2024 | Last Updated By: Brown, Dahlia B

Attachments:

+ Add Attachments

How to Submit a Document Budget Request (DBR)

You will need to do the same, under the **DBR Action** drop down menu, select **ROUTE for approval** then hit **Submit**.

Main Menu ▾ FRS ▾ DBR ▾ DBR Document

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

DBR Search | DBR Document | Create DBR

DBR Document Number: U500511 **DBR Action:** Select an action... ▾

Submit

Select an action
 ROUTE for approval
 ROUTE with Extra Action
 REOPEN to edit
 CANCEL

Departmental Budget Request

Document FY: 2025

DBR Document: U500511 (DBR Report)

Routing Document:	Route Status:
Summary: Pool Transfer	Total: \$444.45
Justification: OTHER (SEE NOTES) (OT)	Dept Ref:
Created Date: 10/25/2024	Created By: Brown, Dahlia B
Last Update Date: 10/25/2024	Last Updated By: Brown, Dahlia B
Attachments: Add Attachments	

Once you hit submit, you will see a **notification** as shown below. This time, under **Routing Document**, select the DBR link to show below the routing process.

Main Menu ▾ FRS ▾ DBR ▾ DBR Document

INFO: Document has been Routed 21 DBR21U500511 (Message: 2519)

DBR Search | DBR Document | Create DBR

DBR Document Number: U500511 **DBR Action:** No action available ▾

Submit

Departmental Budget Request

Document FY: 2025

DBR Document: U500511 (DBR Report)

Routing Document: DBR21U500511	DBR Status: Closed (CL)
Summary: Pool Transfer	Route Status: In Dept Rt (DR)
Justification: OTHER (SEE NOTES) (OT)	Total: \$444.45
Created Date: 10/25/2024	Dept Ref:
Last Update Date: 10/25/2024	Created By: Brown, Dahlia B
Attachments: Add Attachments	Last Updated By: Brown, Dahlia B

How to Submit a Document Budget Request (DBR)

Once you click on the **DBR Routing number**, you can see the **document history and routing path**. This is helpful to notify those individuals who are responsible in the approval process.

ROUTING NOTES							
There are no Routing notes for this document.							
Add Notes							
DOCUMENT HISTORY							
Desk	Fwd Name	Office	Date	Name	Phone	Action	
CREATE DSK			10/25/2024 3:29:30 PM	Brown, Dahlia B	903-886-5075	Submitted	
CURRENT LOCATION							
Desk	Fwd Name	Office	Date	Name	Phone	Action	
SIGNER DSK		21-BUSI	10/25/2024 3:29:30 PM	Atinc, Mahmut G (Sub) Wheeler, Ronald S (Sub) Rhodes, Cynthia W (Sub) Ogunc, Asli K	903-886-5703 903-886-5677 903-886-5514 903-886-5191	Approval Pending	
DOCUMENT PATH (PENDING)							
Office	Desk	Name	Phone	Department	Action		
21-DBR OFFICE	APPROVER	(Sub) Livingston, Tina W (Sub) Baker, Sarah E Benson, Belinda A	903-886-5667 903-886-5045 903-468-3034		ENROUTE		
21-DBR OFFICE	PASS-THRU	(Sub) Martin, Arlana C (Sub) Baker, Sarah E (Sub) Livingston, Tina W Martin, Arlana C (Sub) Benson, Belinda A	903-886-5041 903-886-5045 903-886-5667 903-886-5041 903-468-3034		POST		
DEPT ROUTING							
Desk	Fwd Name	Office	Date	Name	Dept	Action	
		BUSI		College Of Business	21-BUSI	Currently Routing	