SECTION 08.03.02.07

DOWNLOADING MONTHLY ACCOUNT STATEMENTS IN EXCEL OR ADOBE

Go to the Canopy Website at https://apps2.system.tamus.edu/CanopyTwo/Login.aspx
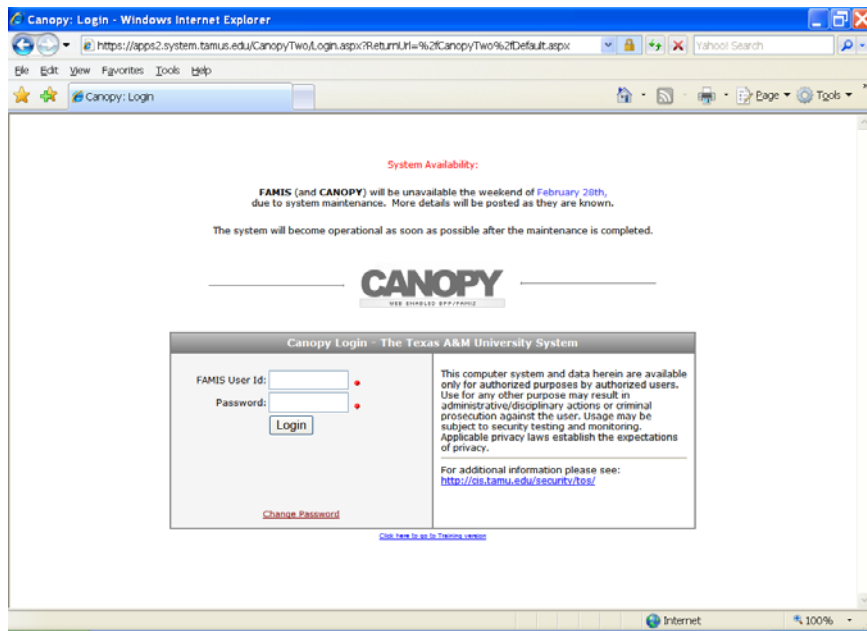
1. Without clicking, hold the cursor over the **FRS** tab, a drop down box will appear. Move the cursor over **ACCOUNT** to **ACCOUNT SEARCH**, and then click.
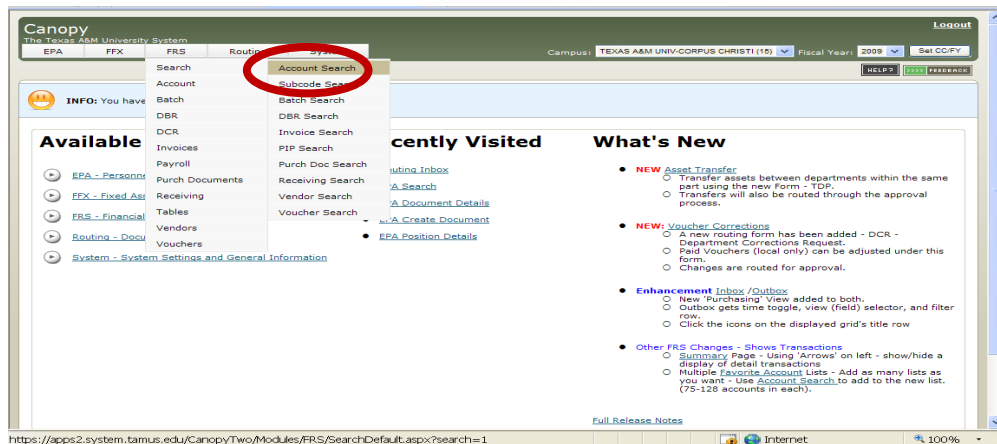
2. *(The following example is by department code, but the search can be performed various ways with similar results.)* A new screen will come up with options to search for accounts. Type in the department code in the box titled **Department**. An added feature is the **Show Support Accounts** located in the top right hand corner: Select **YES** to include the support accounts if needed. Click on the **SEARCH** box.

*** **NOTE**: If you have added any accounts to **My Account** tab then the drop down box for selecting an account will be available. Otherwise, it will not be until you have created your list.***


3. In the new screen, you can either click on the box below **ADD** to select all the accounts found with the search; or you can individually select the accounts needed. Click on **ADD**.

4. Next, open the **REPORTS** tab. Click on the box below **ALL**, (located in the right hand corner) this will select all the accounts listed. The two icons located above **ALL** represent Excel and PDF. If you select **ALL**, every account chosen will download into Excel/PDF file. Click on the preferred icon.** **NOTE**: *If you choose* **Excel**, *each account will be on a separate* **tab**; *but If you select* **PDF**, *each account will be on a separate* **page**.**
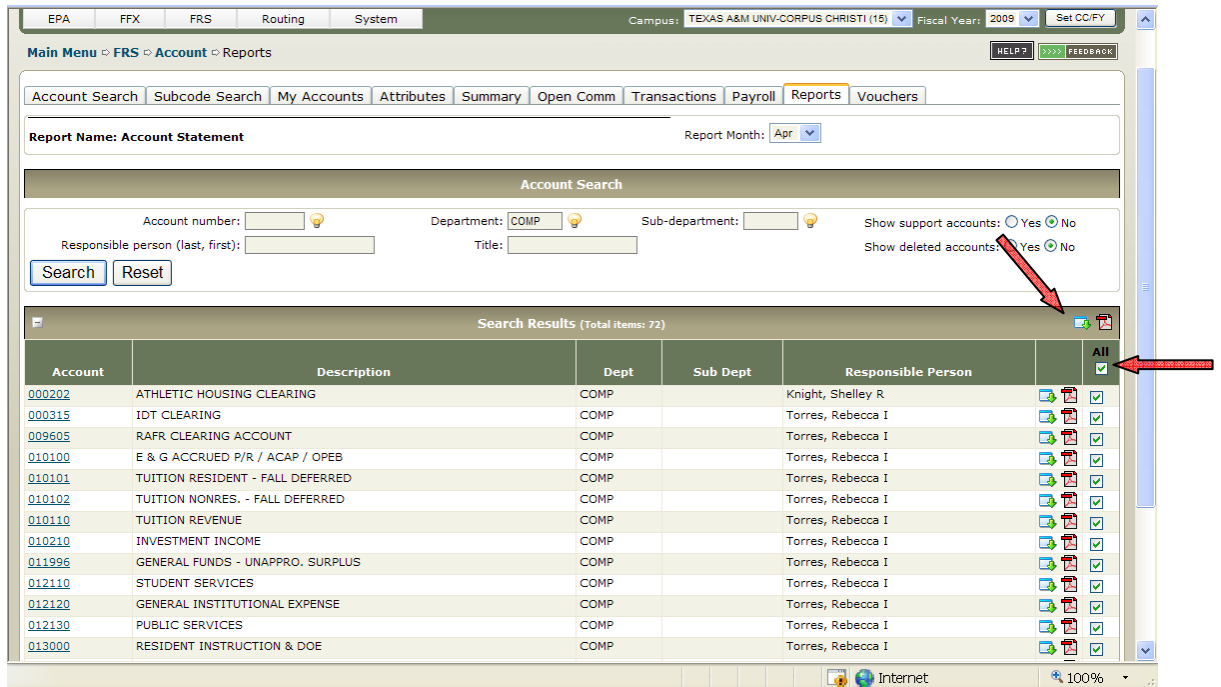
5. The other option would be to click on the icon next to the individual account you want to view in Excel/PDF. Then click on the preferred file to download.
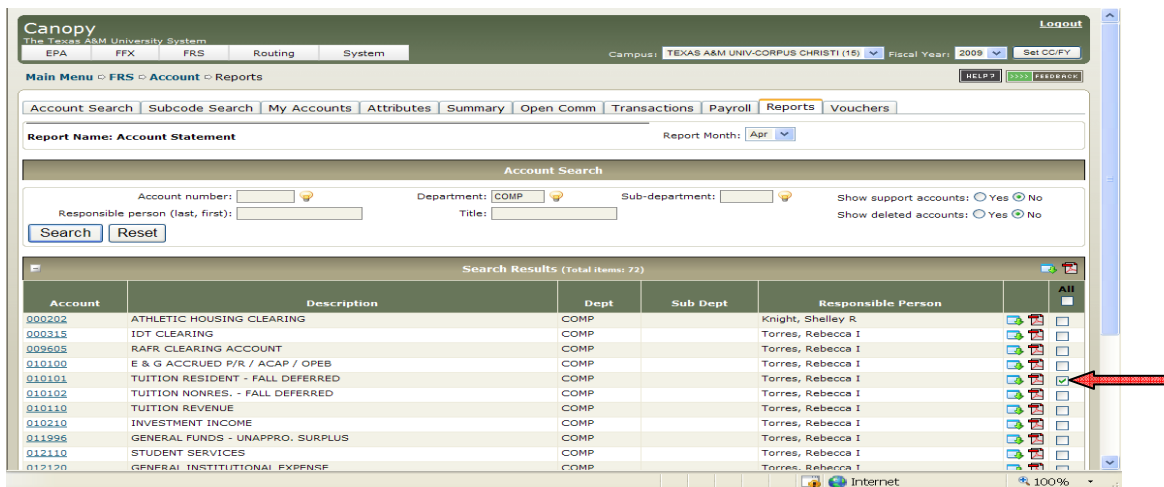
6. A box will pop up asking to **OPEN** or **SAVE** this file. Chose your preference and the file will download or open.
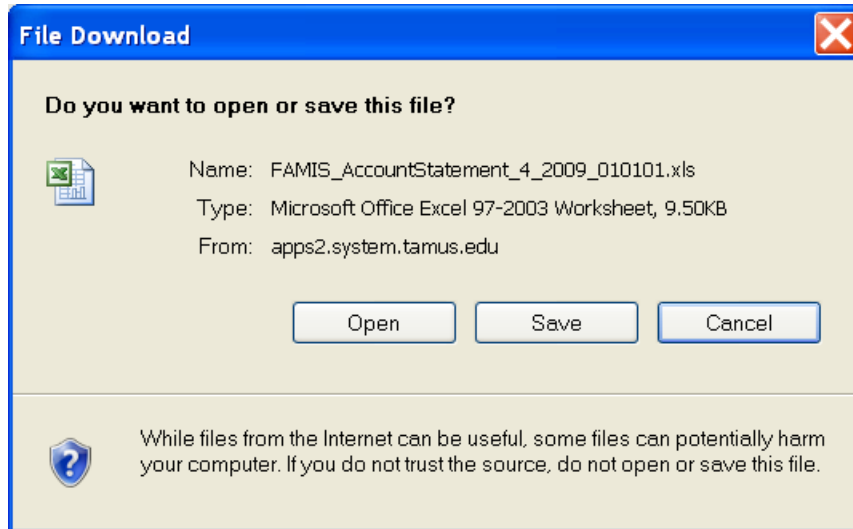
7. Steps 4 thru 6 will have to be repeated if there are multiple pages of accounts. There are 15 accounts per each page.

8. In the top right corner of the screen there is an option to change "Fiscal Year", enter year and hit "Set CC/FY" button. Also, there is an option to change fiscal month located under the **Reports** tab.