This guide serves the purpose to show organizations how to create a budget request on GobblerConnect. For maximum efficiency, please follow the guide in chronological order by scrolling down to navigate between the pages.
PART 1: Accessing the System

Updating Your Organizations Roster

- Go to GobblerConnect
- Log in to your account
- Go to your organization's main page

Step 1:
Once on the organization's main page, click 'MANAGE ORGANIZATION' in the upper right corner.
Step 2:
Once in the action center, click the 3 horizontal lines next to your organization's name.
Step 3:
Then, select ‘Roster’ under the Organization Tools options. Once brought to your organization's roster, please go through each position to make sure the person registered to that position is accurate for this year.

Step 4:
After verifying that all positions are correct and have the right person attached to them, scroll to the top of the page and click ‘MANAGE POSITIONS’ next to the pencil icon in the upper right corner.
Step 5:
Once on the page, click the first position listed and follow step 6. You will need to do these steps for every position. On each position’s page you will see a section labeled 'Set Management Access'

Step 6:
You will be given 3 options:

- **No Access** - gives the position no access to any management task. This setting should be used for general members of your organization.
- **All Access** - gives the position full access to all management tasks. This setting should be reserved for Advisors and President(s)/Director(s) of organizations.
- **Limited Access** - lets you pick and choose which management tasks the position can have access to. This setting should be used for officers of your organization.
Step 7:

For those in charge of your organization's finances, you must make sure to give them 'Full' access under 'Finance'. This access must be given in order for them to access the budget, make requests, and check pending requests.
Limited Access

People with this position can access the management features selected below.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documents</td>
<td>None</td>
</tr>
<tr>
<td>Elections</td>
<td>None</td>
</tr>
<tr>
<td>Events</td>
<td>None</td>
</tr>
<tr>
<td>Finance</td>
<td>None</td>
</tr>
<tr>
<td>Messaging</td>
<td>None</td>
</tr>
<tr>
<td>News</td>
<td>None</td>
</tr>
<tr>
<td>Photo</td>
<td>None</td>
</tr>
<tr>
<td>Profile</td>
<td>None</td>
</tr>
<tr>
<td>Roster</td>
<td>None</td>
</tr>
<tr>
<td>Service Hours</td>
<td>None</td>
</tr>
</tbody>
</table>
PART 2: Operating the System

How to Operate the System

Once you have completed all the steps in Part 1, those with access will be able to use the Finance System within GobblerConnect!

All of your organization's finances will now be handled through GobblerConnect directly.

Step 1:
Access GobblerConnect, log in to your account, and go to your organization's home page. Once there, click 'MANAGE ORGANIZATION' in the upper right corner.

Step 2:
Next, click on the 3 horizontal lines next to your organization's name in the upper left corner.
Step 3:
Select 'Finance' under the Organization Tools.
Step 4:

Once on the Finance main page you can access your organization's previous budget requests, check the status of current requests, and submit new requests!

Continue through the presentation to learn how to submit requests and check their status.
## Homecoming Board Budget Requests

<table>
<thead>
<tr>
<th>Status</th>
<th>Request Name</th>
<th>Process</th>
<th>Submitted</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Annual Funding Request for 2019-2020</td>
<td>UC3O Annual Funding for 2019-2020</td>
<td>---</td>
<td>$9001.89</td>
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<tr>
<td>Approved</td>
<td>Annual Funding Request</td>
<td>UC3O Annual Funding for 2018-2019</td>
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<td>$12000.65</td>
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<td>Budget</td>
<td>2019-2020 RSO/USLP General Program Funding</td>
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<td>Homecoming Week Activities</td>
<td>UC3O Request--Increases, New Items, Reallocations--Annual Fu...</td>
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</tr>
<tr>
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<td>Organization Competition</td>
<td>2019-2020 RSO/USLP Competition Funding</td>
<td>---</td>
<td>$0.00</td>
</tr>
<tr>
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<td>Organization Conference</td>
<td>2019-2020 RSO/USLP Conference Travel Funding</td>
<td>---</td>
<td>$0.00</td>
</tr>
<tr>
<td>Saved</td>
<td>Organization Equipment</td>
<td>2019-2020 RSO/USLP Small Grant Funding (Equipment) Items R...</td>
<td>---</td>
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<tr>
<td>Saved</td>
<td>Organization Event</td>
<td>2019-2020 RSO/USLP Major Event Funding</td>
<td>---</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Total Items: 8
PART 3: Submitting the Requests

Submitting Requests

Submitting requests will now be done through your organization’s page on GobblerConnect. To apply, follow Part 2, Steps 1-4 to navigate your way to the Finance main page. Then, continue on through this part (Part 3) to learn how to submit the requests.

Step 1:

To create a new budget request, click the blue bar in the upper right corner titled 'CREATE NEW REQUEST' and then click the down bar ‘Create Budget Request’

![Create New Request](image)

Step 2:

Next you will be able to select the funding application. Once selected, you will be asked to select what funding category that you want to submit under: General Programming, Small Grant, Operational, Major Event, Conference, and Competition. You will then be asked questions specific to the funding category chosen.

![Create New Budget Request](image)
General Programming Funding:

1. The first page of the General Funding application will ask for the title and a description of what the funds will be for.
2. Next, you will be asked to provide a primary contact's email address. Please be sure the address you give is someone within the organization that will be able to check their email and answer any questions regarding the competition in a timely manner.
3. If the event is being held off-campus please be sure to include details and justification for why the event should be off-campus.
4. Reminder that the cost of venue rental will not be covered if you are charging for the event.
5. After you have answered all the questions regarding the funding you are requesting, you will have to include a cost breakdown. Please be sure to include all necessary expenses. Refer to Policy & Procedure as needed.

Small Grant Funding:

1. Please be sure the email address you give will be able to check their email and answer any questions regarding the funding in a timely manner.
2. Please be sure to answer these questions with as much detail as possible.
3. Please be sure to include the necessary quotes. Your request will not be processed without them.
4. After you have answered all the questions regarding the equipment, you will have to include a cost breakdown. Please be sure to include all necessary expenses.

Operational Funding:

1. Please be sure the email address you give will be able to check their email and answer any questions regarding the funding in a timely manner.
2. Please be sure to answer these questions with as much detail as possible.
3. Please be sure to include the necessary quotes. Your request will not be processed without them.

Major Event Funding:

1. Please be sure the email address you give will be able to check their email and answer any questions regarding the event in a timely manner.
2. Please list any and all organizations you are co-sponsoring with, if applicable.
3. Venue rentals will not be funded if you are charging for the event. If the event is being held off-campus please be sure to include details and justification for why the event should be off-campus.

4. After you have answered all the questions regarding the event, you will have to include a cost breakdown. Please be sure to include all necessary expenses. Refer to Policy & Procedure as needed.

**Competition Funding:**

1. Next, you will be asked to provide a primary contact's email address. Please be sure the address you give is someone within the organization that will be able to check their email and answer any questions regarding the competition in a timely manner.

2. Please be sure to include the Competition's website or email the Budget Board an official schedule. Your request will not be processed without this. If you do not have the schedule yet, it must be submitted 30 days prior to the competition.

3. After you have answered all the questions regarding the competition, you will have to include a cost breakdown for the competition. Please be sure to include all necessary expenses; consult policy and procedure as necessary.

**Conference Funding:**

1. You will be asked to provide a primary contact's email address. Please be sure to check your email and answer any questions regarding the conference in a timely manner.

2. Please be sure to include the Conference's website or to email the Budget Board an official schedule. Your request will not be processed without this. If you do not have the schedule yet, it must be submitted 30 days prior to the competition.

3. After you have answered all the questions regarding the conference, you will have to include a cost breakdown for the conference. Please be sure to include all necessary expenses. Refer to Policy & Procedure as needed.
PART 4: After Requests

Reviewing Requests

To review past budget requests, visit the main finance page (see Part 2 to refresh how to get there). Once on the main page simply click on a request to review it!

Request Status

Once a request has been submitted, you can check the status by looking in the far left column under your organization's Budget Requests.

This column will say whether your request has been approved, denied, withdrawn, returned for revisions, or saved (which means it has been submitted but not yet reviewed).

If a request has been sent back to you, your organization will have one week to reply before the request is denied.

Request History

Once you have selected a request, you will be able to view the request's history in a box to the right of the request. Here you can see a full review of actions taken throughout your request's history.
Approved

- If your request has been approved, the top box of the Request History will be green with a green check in the left of the box. It will read "Approved and Allocated" indicating that you can proceed with spending.
- Be sure to read all attached comments and approval language. These tell you important information about your request and access to funds.

Denied
- If your request has been denied, the top box of the Request History will be red with a red X in the left of the box. It will read "Rejected" indicating that you can NOT proceed with spending.
- Read all of the comments. They will outline why the request was denied, and how to appeal, if applicable.