

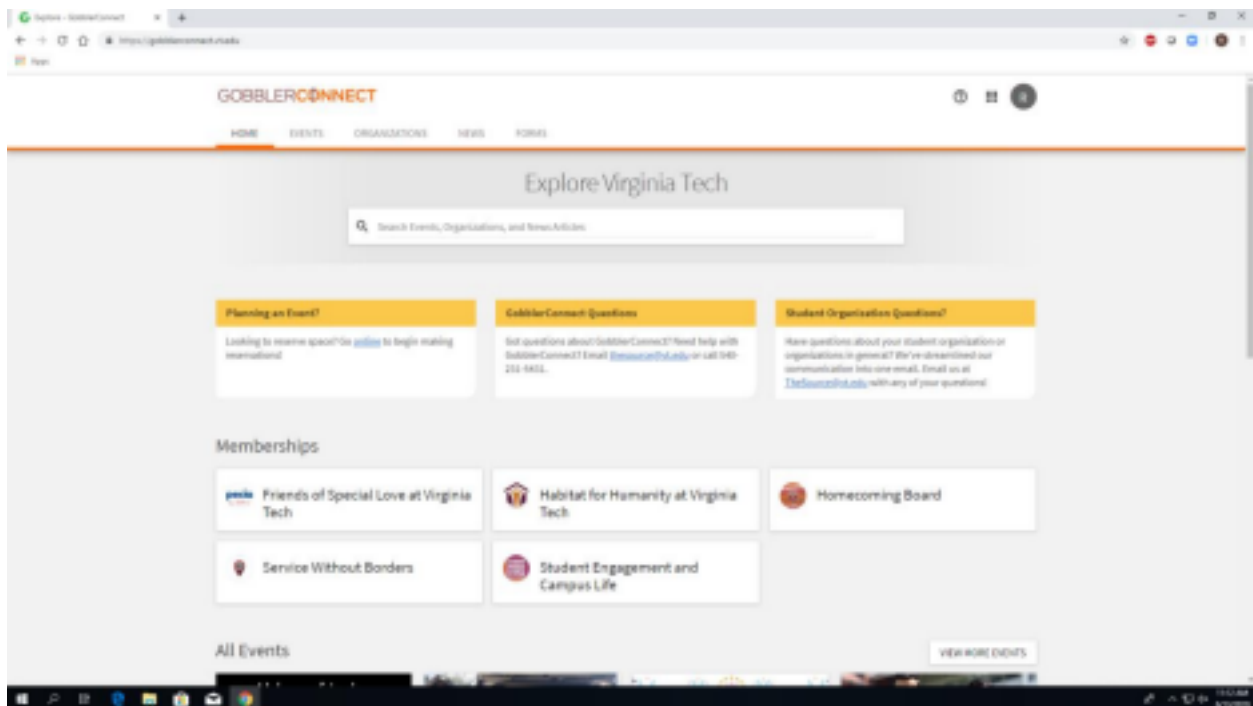
USS Appropriations Request System Guide: 2023-2024

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

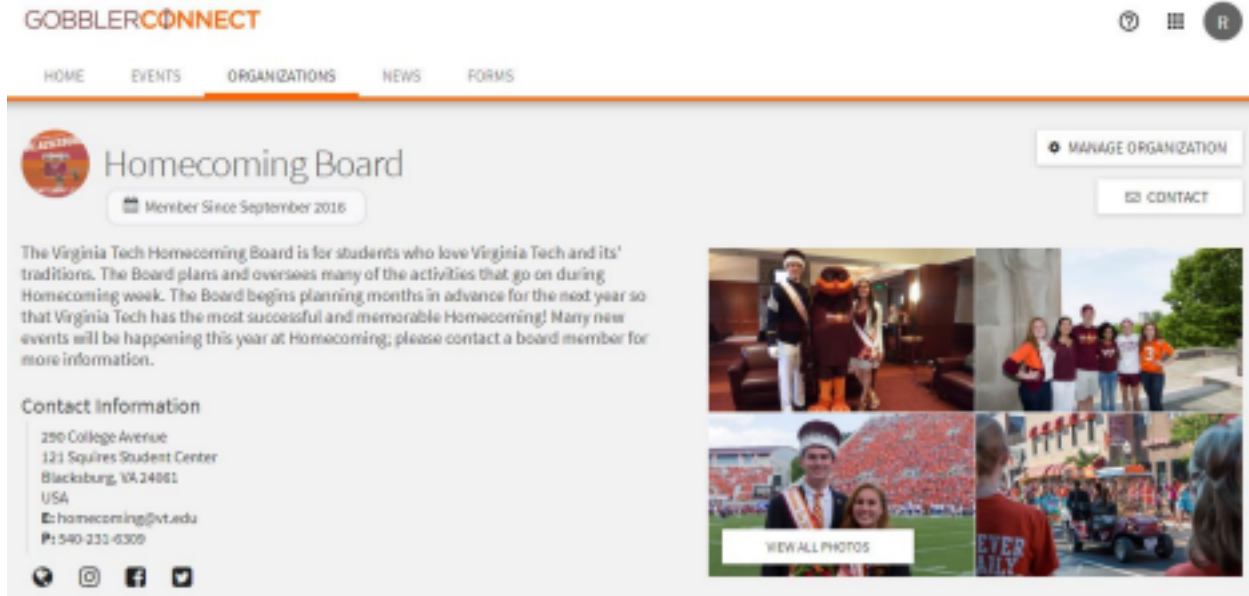
Updating Your Organizations Roster

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



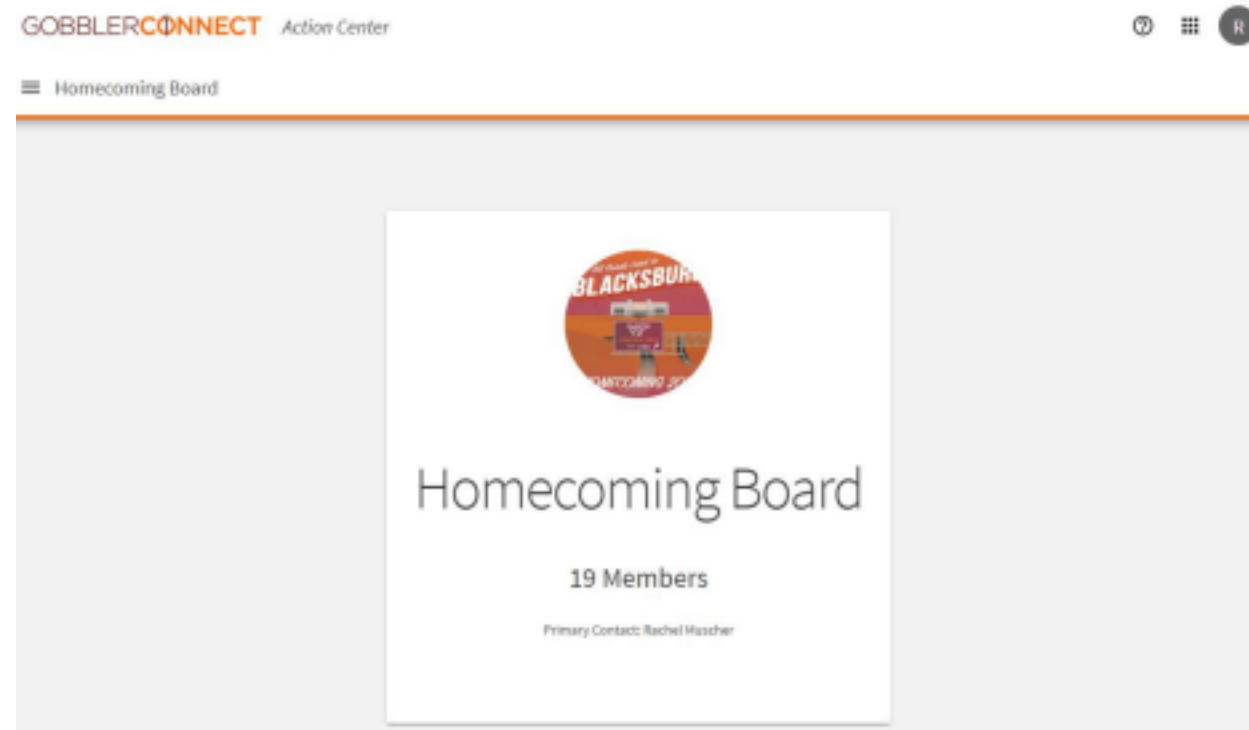
Step 1:

Once on the organization's main page, click 'MANAGE ORGANIZATION' in the upper right corner.



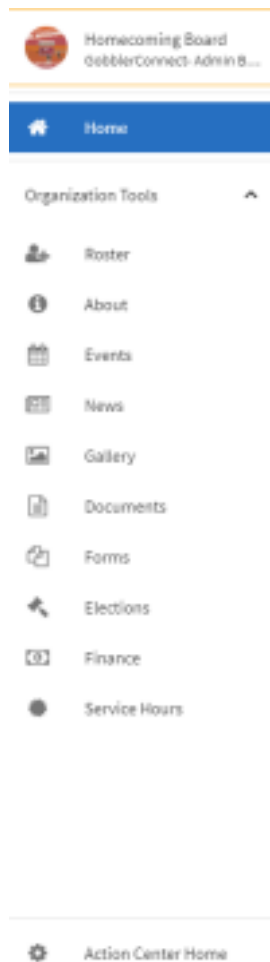
Step 2:

Once in the action center, click the 3 horizontal lines next to your organization's name.



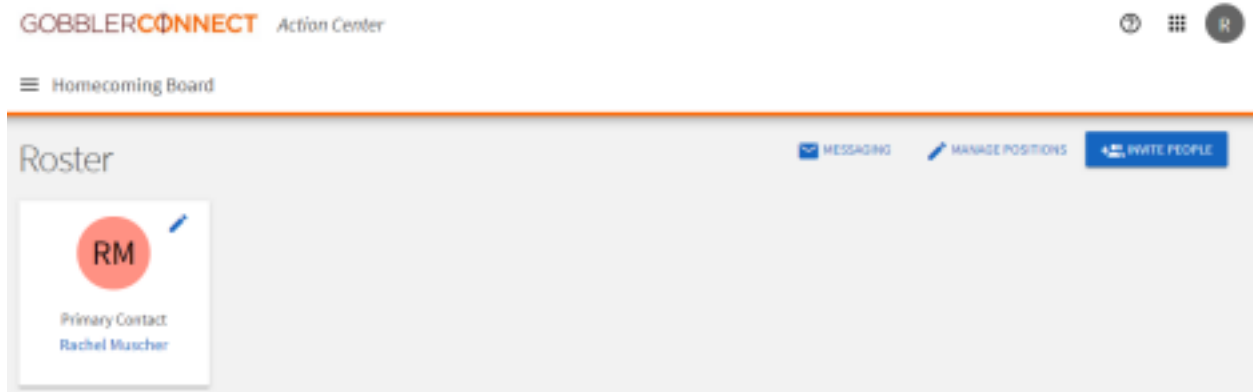
Step 3:

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'

Manage Positions

[+ position](#)

Name *	Template *	Type *	Status *
Advisor	Advisor	Advisor	Active
Assistant to the President	Organization Created	Member	Inactive
Authorized Contact (Advisor)	Advisor - Authorized Contact	Member	Active
Authorized Contact 1	Authorized Contact 1	Member	Active
Authorized Contact 2	Authorized Contact 2	Member	Active
Authorized Contact 3	Authorized Contact 3	Member	Active
Authorized Contact 4	Authorized Contact 4	Member	Active

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.

Assistant Director

*Position Name
Assistant Director

Position Type
Officer

Show holders of this position on the organization's roster

Active *(If not checked, the position will only be available as a Past Position)*

Set Management Access

No Access

People with this position can access NO management features

All Access

People with this position can access ALL management features

Limited Access

People with this position can access the management features selected below

SAVE

CANCEL

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

Documents

None



Elections

None



Events

None



Finance

None



None

View

Full

Messaging

None



News

None



Photo

None



Profile

None



Roster

None



Service Hours

None



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.

The screenshot shows the GobblerConnect interface for the Homecoming Board organization. At the top, the GobblerConnect logo is on the left, and navigation icons for home, events, organizations, news, and forms are in the center. On the right, there are icons for a notification bell, a grid, and a user profile. Below the navigation is a horizontal menu with 'HOME', 'EVENTS', 'ORGANIZATIONS' (highlighted), 'NEWS', and 'FORMS'. The main content area features the Homecoming Board logo and name, a 'Member Since September 2016' badge, and a 'MANAGE ORGANIZATION' button. A 'CONTACT' button is also present. A descriptive paragraph follows, stating the board's purpose. Below this is contact information: 290 College Avenue, 121 Squires Student Center, Blacksburg, VA 24061, USA, email: homecoming@vt.edu, phone: 540-231-6309. Social media icons for Twitter, Instagram, Facebook, and YouTube are at the bottom left. On the right, there are four photo thumbnails with a 'VIEW ALL PHOTOS' button below them.

Step 2:

Next, click on the 3 horizontal lines next to your organization's name in the upper left corner.

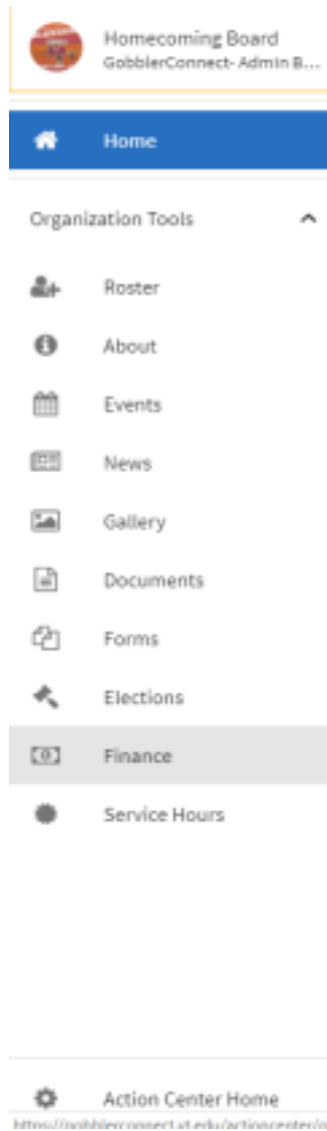
GOBBLERCONNECT *Action Center*

☰ Homecoming Board

The screenshot shows the organization profile page for the Homecoming Board. At the top, the GobblerConnect logo and 'Action Center' text are on the left, and a hamburger menu icon is next to the organization name 'Homecoming Board'. The main content area is a white card with a circular logo at the top that says 'Blacksburg Homecoming 2016'. Below the logo, the text 'Homecoming Board' is displayed in a large font, followed by '19 Members' and 'Primary Contact: Rachel Muscher'.

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

Status	Request Name	Process	Submitted	Amount
Approved	Annual Funding Request for 2020-2020	UCSO Annual Funding for 2019-2020	—	\$0003.89
Approved	Annual Funding Request	UCSO Annual Funding for 2018-2018	—	\$12902.65
Saved	Budget	2019-2020 RSO/USLP General Program Funding	—	\$0.00
Saved	Homecoming Week Activities	UCSO Request- Increases, New Items, Reallocations-- Annual Fu...	—	\$0.00
Saved	Organization Competition	2019-2020 RSO/USLP Competition Funding	—	\$0.00
Saved	Organization Conference	2019-2020 RSO/USLP Conference Travel Funding	—	\$0.00
Saved	Organization Equipment	2019-2020 RSO/USLP Small Grant Funding (Equipment/Items R...	—	\$0.00
Saved	Organization Event	2019-2020 RSO/USLP Major Event Funding	—	\$0.00

Total Items: 8

Page Size: 40  1 / 1

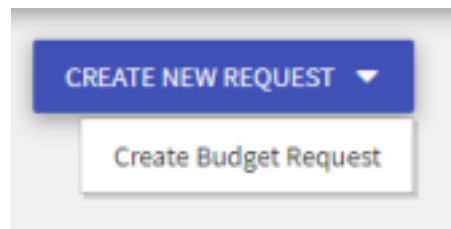
PART 3: Submitting the Requests

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'



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

Select a Process or Budget to Start Your Request

PROCESS: **2021-2022 RSO/USLP Funding**
Available from 8/23/21 8:00 AM to 12/2/21 12:00 AM
Please fill out this form if you are applying for SBB Funding for the 2021-2022 school year. Refer to SBB Policy & Procedure for application guidelines.

Budget: **Funding Request**
Please provide detailed information regarding the budget request for your organization

CANCEL

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.

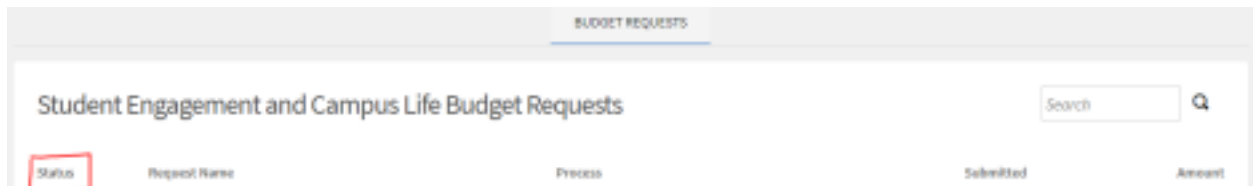
PART 4: After Requests

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.



The screenshot shows a web interface for "BUDGET REQUESTS" titled "Student Engagement and Campus Life Budget Requests". It features a search bar and a table with the following headers: Status, Request Name, Process, Submitted, and Amount. The "Status" header is highlighted with a red rectangular box.

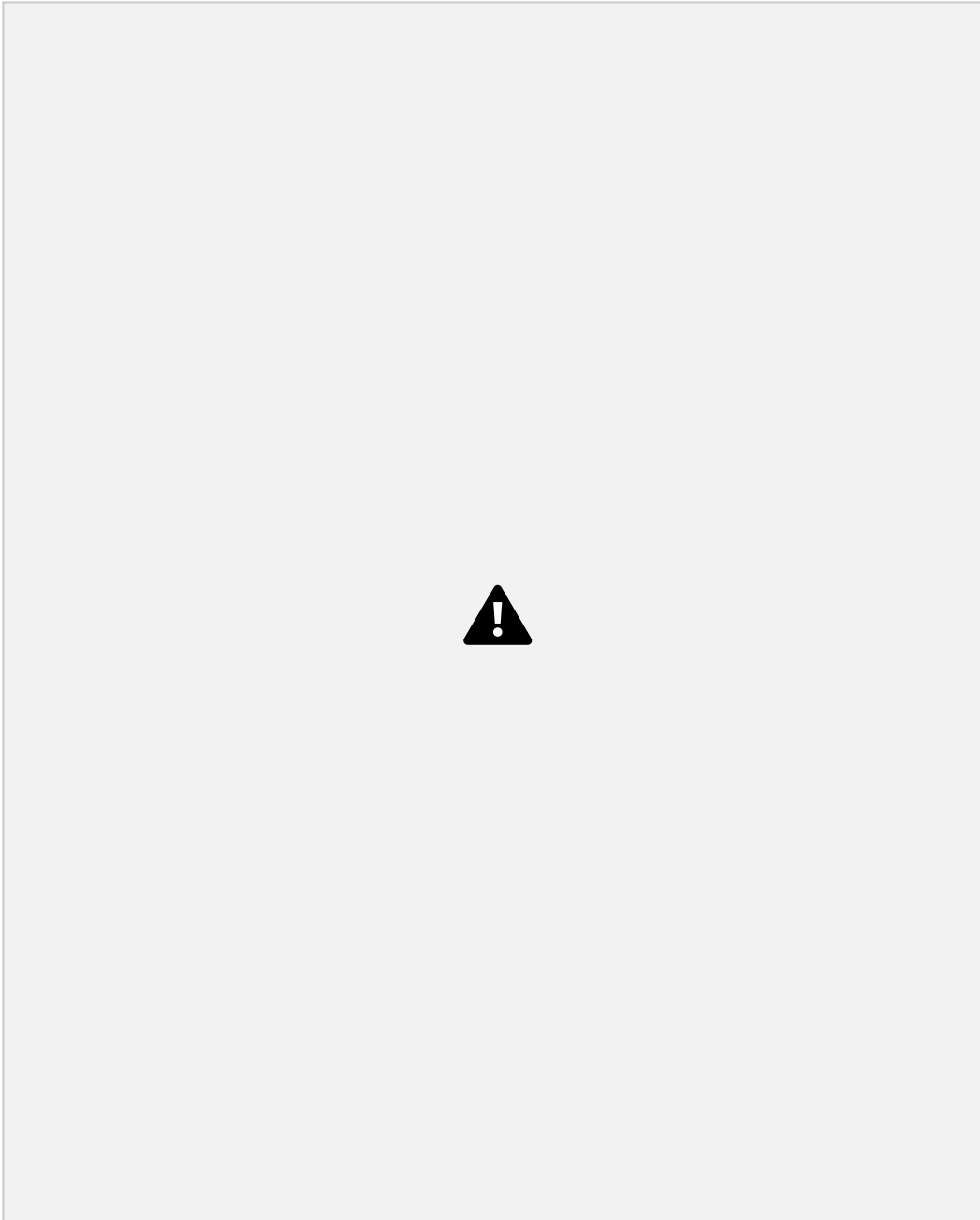
Status	Request Name	Process	Submitted	Amount
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This column will say whether your request has been approved, denied, withdrawn, returned for revisions, or saved (which means it has been submitted but not yet reviewed).

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.