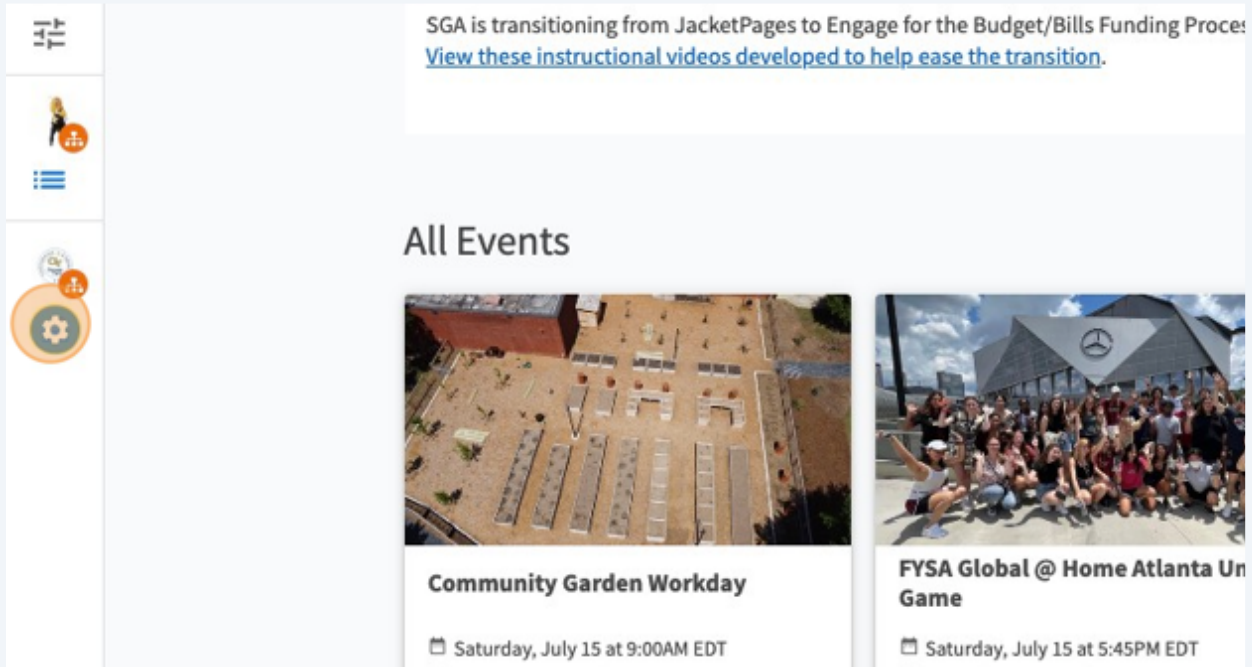


Engage Submission Process by the RSO Financial Officer

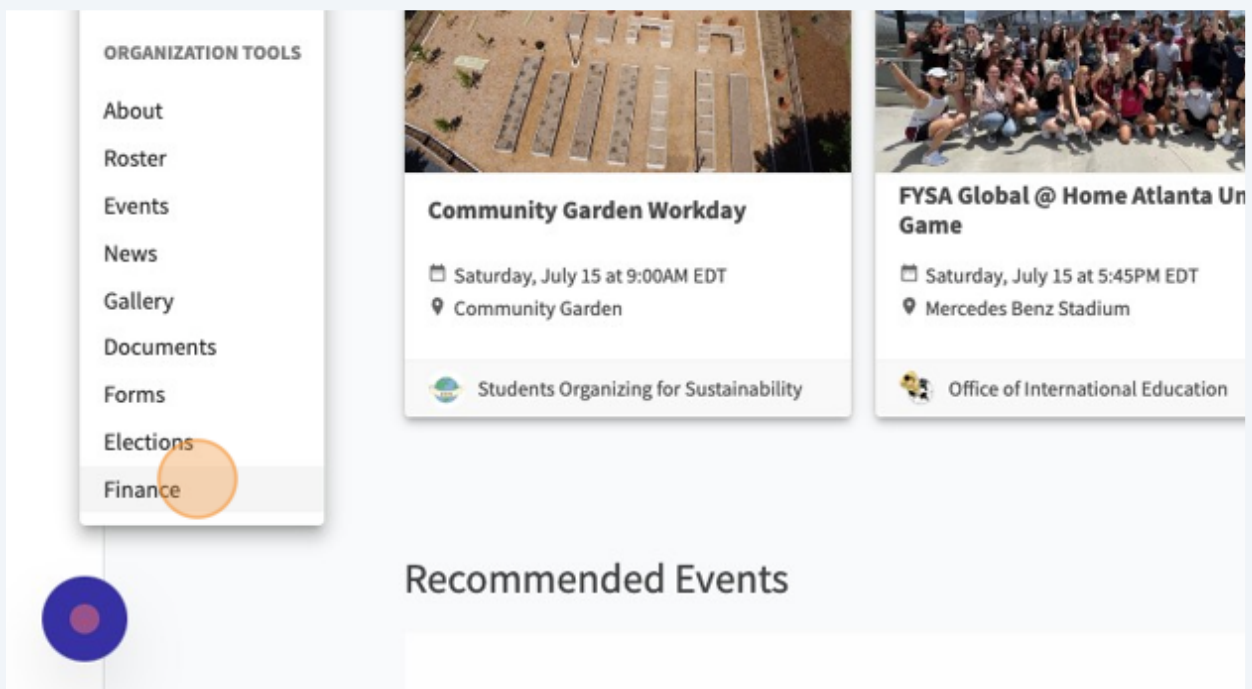


When a **Financial Officer** wants to submit a finance request to SOFO, they should hover over the relevant organization's profile picture and select the gear icon.

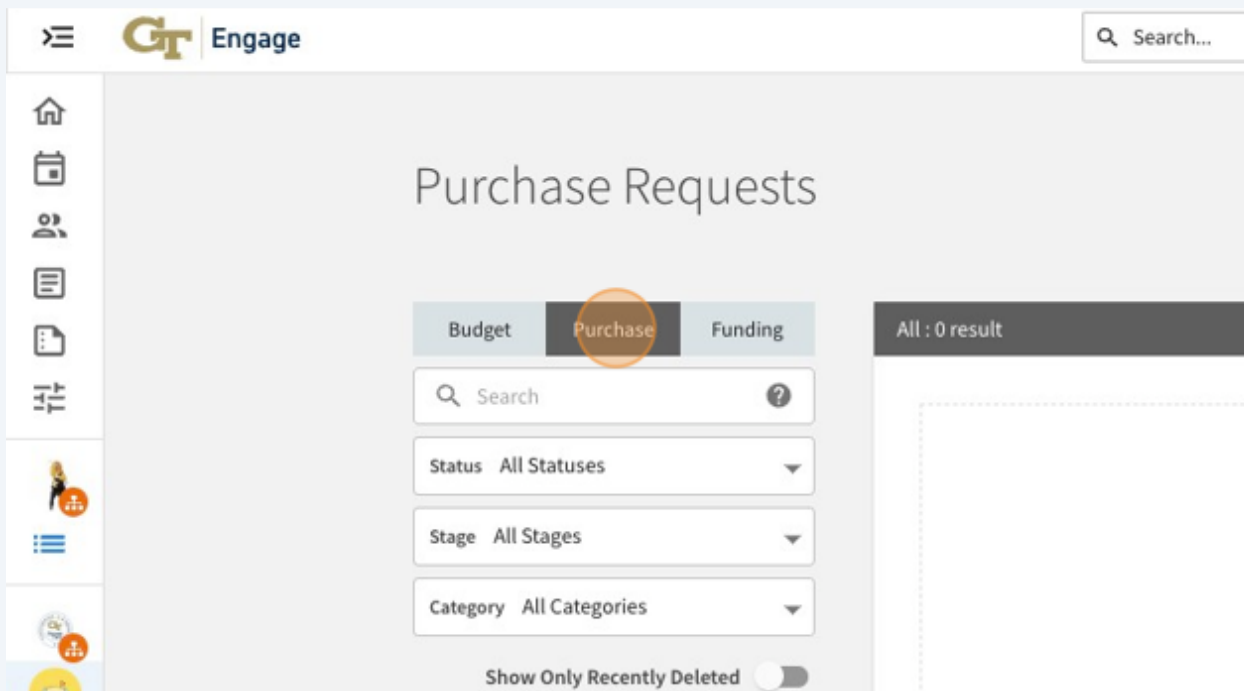


2

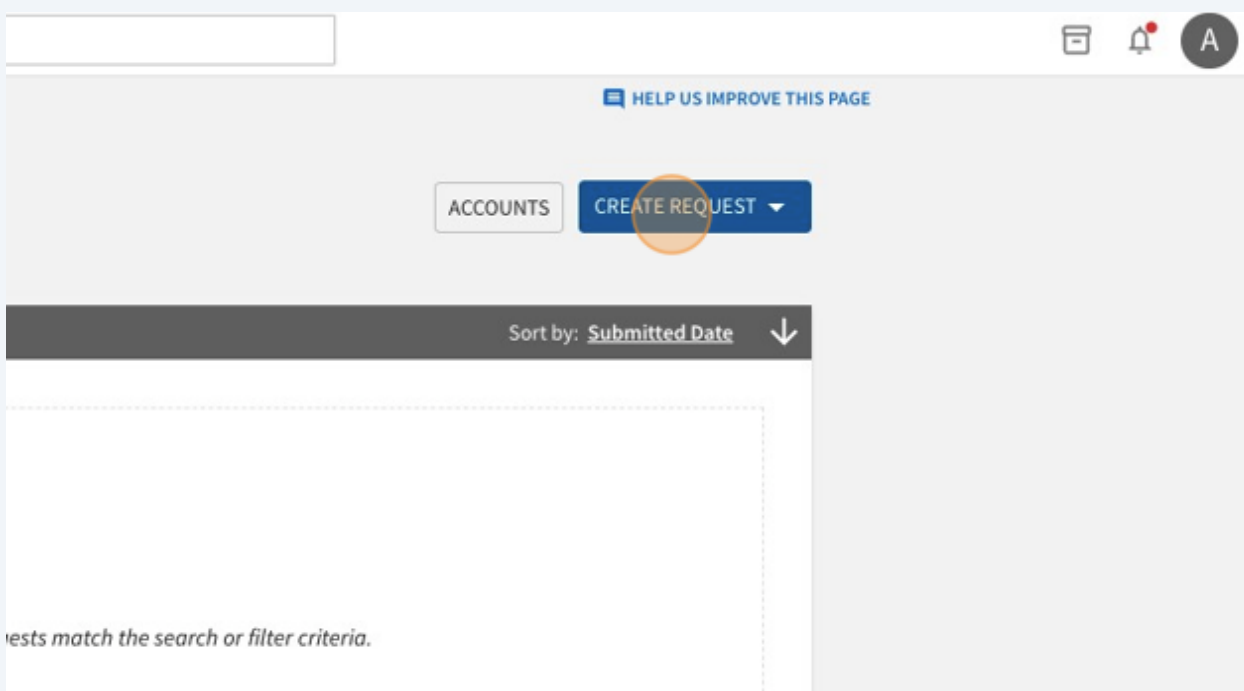
After the toolbar appears, students will select "finance".



- 31 Once brought to the finance tool, students will be focusing on the purchase section, as this is where their submitted SOFO request will appear.



- 32 To submit a purchase request/reimbursement, students will select the "create request" button.

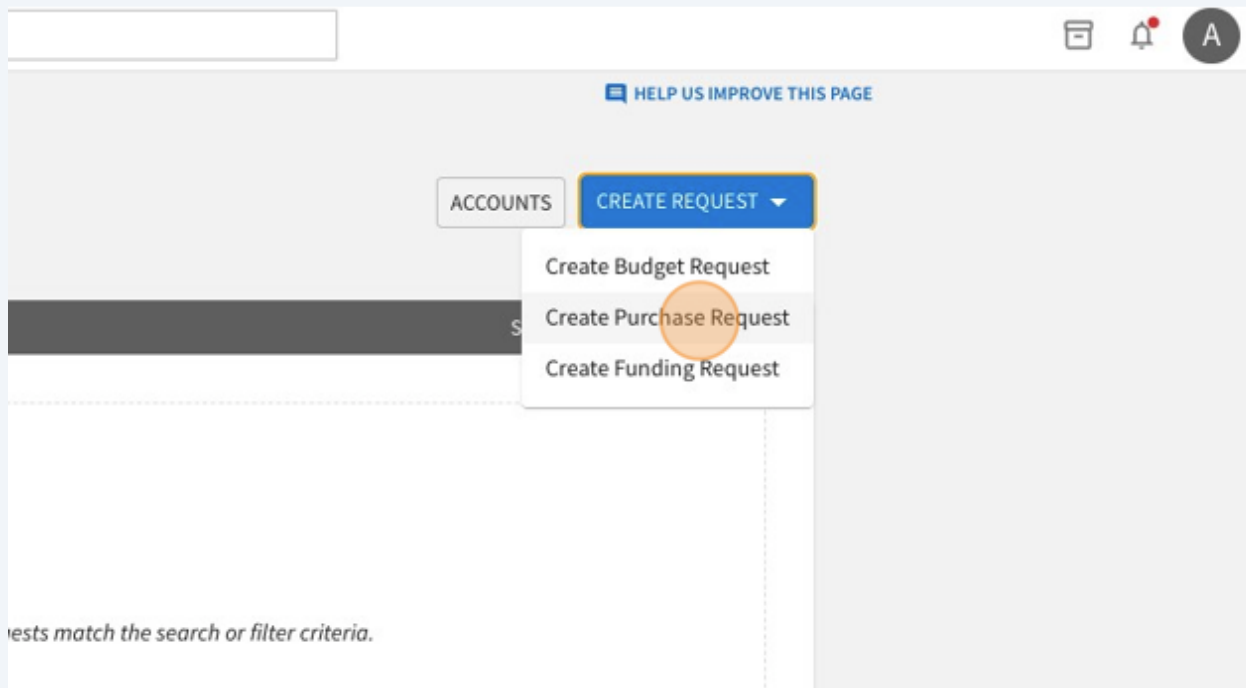


33

For SOFO Purchases and Reimbursements, students will click "Create Purchase Request".

The "Budget Request" button is what students will select when submitting a bill to SGA, parents fund, or the student foundation.

The "Funding Request" button would be used for an organization that wanted to request money be moved into their account (ex. hosted a fundraiser and needs to add funds).



34

Once they begin the purchase request, they will be able to fill in any and all relevant details.

The screenshot shows a web interface for creating a purchase request. On the left is a vertical sidebar with icons for home, profile, documents, a printer, and a person. The main content area is titled "Create Purchase Request" and contains a "Request Details" section. This section includes a "Subject" field with a red asterisk and an orange circle highlighting the input area, a "Description" text area, and a "Requested Amount" field with a red asterisk and a small upward arrow icon.

35

This includes payee information.

The screenshot shows the "Payee Information" section of the form. It includes a "First Name" field with an orange circle highlighting the input area, a "Street" text area, a "Street Continued (Optional)" text area, and partially visible "City" and "State/Province" fields at the bottom.

36 It also includes any required SOFO questions in the additional information section.

The screenshot shows the 'Engage' system interface. At the top left is the 'GT Engage' logo and a search bar. A vertical sidebar on the left contains various navigation icons. The main content area is titled 'Additional Information'. It features a red asterisk and text: '* Upload your receipt(s) for this purchase request. If you have more than one'. Below this is a blue 'UPLOAD FILE' button. A light blue box contains the text: 'Please note: the following section is only to be completed if you are submitting following questions if you are submitting a request for GTSF, MOVE, or other n reviewed.'. At the bottom of this section is a red box with the text: 'MUST READ: INSTRUCTIONS BEFORE SUBMITTING'.

3 To submit a request, the RSO **Financial Officer** will hit the "submit request" button. Submitted requests will appear in the purchase section of the RSOs finance tool. After requests are submitted, the stage must be changed to notify the next person.

The screenshot shows the 'Payee Signature' section of the Engage system. It includes a text box for the signature and a red box with the text: 'MUST READ: INSTRUCTIONS AFTER SUBMITTING'. Below this are two bullet points: '• For Purchase requests, after submitting please select the "For Finance Officer Only: s submission. Your final submission can be located in the "Finance" tool on your Enga' and '• For Reimburse requests, after submitting please select: For Reimbursements: Send t submission. Your final submission can be located in the "Finance" tool on your Enga'. At the bottom of the form are two buttons: 'SUBMIT REQUEST' and 'CANCEL'.

After submitting the request, the Financial Officer Should make sure to change the stage of the request from "Submitted" to "Send to SOFO Accountant". This task can only be completed by the person who has the Finacila Officer role of the RSO. Failure to change the stage will result in your reuest not being submitted to SOFO.