

Reviewing Finance Requests

Article Number

000089563

Information

Finance requests come in from organizations as one of two types of requests: Purchase Requests and Funding Requests.

- A **funding request** asks for a lump sum of money to be granted to an organization. A deposit or allocation is a typical transaction for this type of request.
- A **purchase request** is the request to spend money from the organization's account on food, supplies, etc. A payment or a transfer is a typical transaction for this type of request.
- A **budget request** formats a request for organization funds to a budget template, typically breaking up the request into multiple line items and possibly pages.

Each type of request requires the final approval of a site administrator *or* a user with full administrative access to the Finance tool. These requests can also be reviewed for feedback by [finance stage reviewers](#). The request must be decided upon before any [transactions](#) can be applied to the request.

Review Finance Requests as an Administrator

As an administrative reviewer, you can see a full list of your finance requests by going to your *Admin view*, selecting the *Finance* dropdown, and clicking the *Requests List*.

Summary Organizations ▾ Events ▾ Users ▾ Elections ▾ Finance ▾ Paths ▾ Configure ▾ Support ▾

Finance Requests

Budget Purchase Funding

Search purchase requests ?

Status Reviewable Requests ▾


Branch All Branches ▾

Stage All Stages ▾

Category All Categories ▾

AllCurrentlyReviewable : 3 results Sort by Su

<p>12-Hour Dance Marathon (Samantha Golden)</p> <p>Sports Equipment</p> <p>No. 5313 Submitted Oct 13, 2020 Status: Unapproved Stage: Dean of Students Review</p>
<p>Women's Soccer (Samantha Golden)</p> <p>Test MESSage</p> <p>No. 5312 Submitted Oct 9, 2020 Status: Unapproved Stage: Business Manager</p>
<p>Women's Soccer (Samantha Golden)</p> <p>Test request</p> <p>No. 5311 Submitted Oct 9, 2020 Status: Unapproved Stage: Business Manager</p>


 All Results Loaded

This will show you a list of your requests and details about each, including the subject, amount, type, status, organization, and the current stage of review. You can filter by type (funding or purchase) and by stage. To review a finance request, select the desired request tile.

You will be taken to the request details where you can review the basic details and any [additional fields](#) you have requested be completed. Use the tabs below the basic request information to review any existing transaction or stage change history on the request.

Making Changes to and Finalizing Finance Requests as an Administrator

Full Finance administrators can edit the details of an organization's finance request by clicking "Edit Responses" on the *Additional Questions* (default) tab.

Administrators can also change the request's **Status**, **Stage**, finance **Category**, or **From Account** before making a final decision on the request. Stages and finance categories can also be changed after the request is approved/completed/cancelled. A non-administrator may only switch the finance stage to other stages included in their position template's access permissions.

After reviewing the request, you can add a comment in the discussion if you would like to share feedback. These comments will be seen by the campus administrator, the submitter and all reviewers/approvers of the event. Comments on Finance Request also have a file attachment option available. This includes threaded replies underneath a comment.

A campus that also leverages Budgeting can choose to also check the **Line Item** with which a purchase request is associated. Note that the Line Item selected will also show how much money currently remains on this balance including amounts spent from other requests.

There are different available **Statuses** for Funding Requests compared to Purchase Requests, and these statuses also have slightly different meanings.

For Funding Requests:

Select the dropdown menu next to "Status" to change the status of the request:

- **Unapproved:** Unapproved is another way to say "pending." This request will remain in a pending status until a further decision is made.
- **Cancelled:** Cancelling a request does not allow the student to resubmit the request with changes. This ends the process and denies the request.
- **Denied:** Denying a request does not allow the student to resubmit the request with changes. This ends the process and denies the request. For a funding request, there is no functional difference between cancelling and denying a request. You can use these statuses to your discretion based on your campus language.
- **Completed:** When a funding request is Completed, you are saying that you are done looking at the request and ready to take further action. "Completed" is the status you will want to select if you are approving the request and need to make a transaction.

Be sure to add any additional comments in the "Comments" box. These will be sent to the user when you click the green "Save" button and will be displayed in the "Request History" section.

For Purchase Requests:

The only difference in reviewing a purchase request vs. a funding request comes with the statuses available for you to select. The decision statuses for purchase requests are listed below:

- **Unapproved:** Same as above. This request will remain in a pending status until a further decision is made.
- **Cancelled:** Same as above. Cancelling ends the process and denies the request. **You can cancel a request even if it has been approved.**
- **Denied:** Same as above. Denying a request ends the process and denies the request. **You cannot deny a request after it has been approved.**
- **Approved:** **Approved is an additional status with purchase requests.** Approving the request lets the student know they can move forward with their purchase. This is the status you will want to select to approve the request to spend funds, but before they have actually been spent. The funds you approve will be marked as **encumbered**, and thus not be included in the organization's available balance when they review it or make an additional purchase request. **Approving a request will allow you to apply transactions.** Transactions affiliated with the request will first subtract from the encumbered balance.
- **Completed:** **As an admin, you can move the status to completed when when the transaction is completely finished.** Once the purchase request is **completed**, any remaining encumbered funds from this request will be transferred back to the organization's available balance.

Note: All requests can be cancelled at any time up until a transaction is associated with the request. After the request has been approved, a transaction must be applied in order for the money to be moved in the system. See this article on applying [transactions](#) to finance requests for more information.

Review Finance Requests as a Stage Reviewer

If you are reviewing a request as a stage reviewer, this means you are looking at individual submissions made by members of your organization. To access these requests, click the "Submissions" icon in the upper right corner and select "Budget Requests"

The screenshot shows the Knowledge State dashboard. At the top left is the logo and name 'KNOWLEDGE STATE'. A search bar is at the top center. On the left is a navigation sidebar with icons for home, calendar, users, documents, and settings. The main content area is titled 'Explore Knowledge State' and features two yellow callout boxes: 'Update your Interests!' and 'Campus Center Hours'. A 'Submissions' dropdown menu is open in the top right, listing categories: Events (0 Pending Submissions), General Forms (0 Pending Submissions), Organization Registration (0 Pending Submissions), and Budget Requests (65 Pending Submissions), which is highlighted with a red border. Below the callouts is an 'All Events' section with four event cards: 'Donuts with the Dean' (Tuesday, Sept 19), 'Movie on the Lawn' (Wednesday, Sept 20), 'Biking Club Weekly Ride' (Friday, Sept 22), and 'Yoga for Beginners' (Wednesday, Sept 27).

Find the request you wish to review and select its tile to open the submission.

The screenshot shows the 'Finance Requests' page. At the top left is the title 'Finance Requests' and an 'ACCOUNT' button at the top right. Below the title are three tabs: 'Budget', 'Purchase' (selected), and 'Funding'. A search bar is labeled 'Search purchase requests'. There are four filter dropdowns: 'Status' (Reviewable Requests), 'Stage' (All Stages), and 'Category' (All Categories). The main content area shows 'AllReviewableRequests : 1 result' and a 'Sort by' dropdown. A single submission is displayed for 'Samantha Golden' with the category 'Sports Equipment', number 'No. 5313', and submission date 'Submitted Oct 13, 2020'. The status is 'Unapproved' and the stage is 'Dean of Students Review'. At the bottom of the submission card is a green checkmark icon and the text 'All Results Loaded'.

Here, you can review the submission, any additional details provided by the submitter, the transaction history, and the stage history. Select *Change Stage* to move the request to another stage. This page also provides you with additional detail about the stage history of the request. You can select the stage from the dropdown menu and leave any comments you want to pass along.

At the bottom, you'll see a discussion section where you can leave comments that will be visible to others involved, including the submitter of the request and any other administrators with access to the request.

Final approval for the request will come from your administrators.

KB Product

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