

USER GUIDE

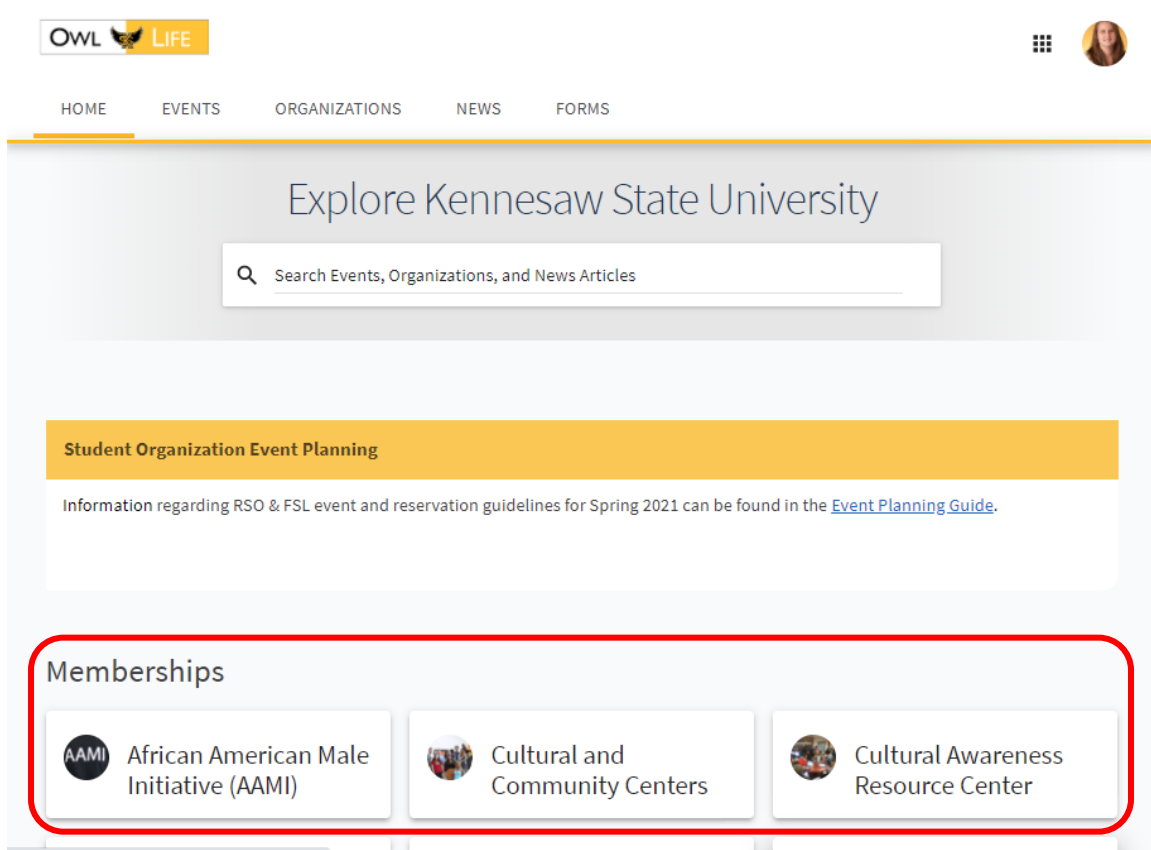
FY22 RSO PURCHASE REQUEST

ITEMS TO CONSIDER BEFORE STARTING YOUR PURCHASE REQUEST

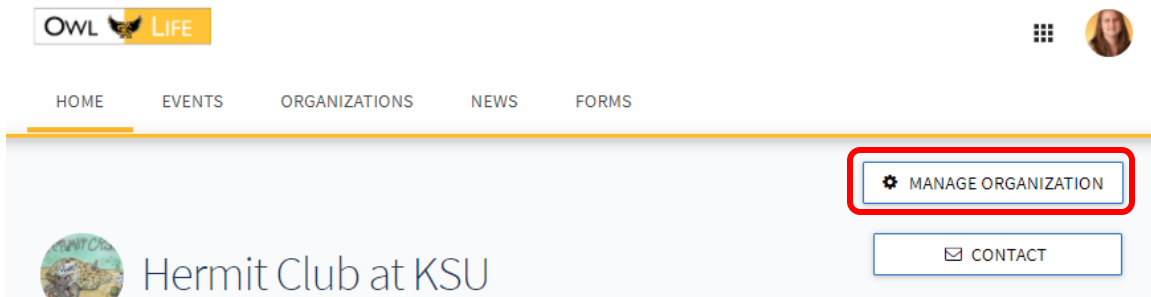
- A Purchase Request is a request to spend money from the RSO’s account. Only Purchase Requests that are associated with an approved Line Item within an approved SABAC Budget can be reviewed and processed.
- Only one Vendor/Payee can be included in a Purchase Request, therefore a new Purchase Request will be needed for each transaction you are wanting reviewed and processed by the Department of Student Activities
- Only the officer who initiates the submission process will be able to access, edit, and submit the Purchase Request.
- It is helpful to review your approved SABAC Budget Request prior to starting your Purchase Request.
- Proper and complete documentation is imperative to a successful and timely Purchase Request being reviewed, approved, and processed.
- If at any point you have questions about the RSO Policy, allowable expenditures, or anything to do with this process or SABAC, please contact SABAC at sabac@kennesaw.edu.

SUBMITTING YOUR RSO PURCHASE REQUEST TO DEPARTMENT OF STUDENT ACTIVITIES

1. Log in to Owl Life at <https://owllife.kennesaw.edu>
2. Under the “Memberships” section, select the registered student organization for which you are submitting a Purchase Request.



3. Once you are on your organization’s page, click the “Manage Organization” button in the top right corner.



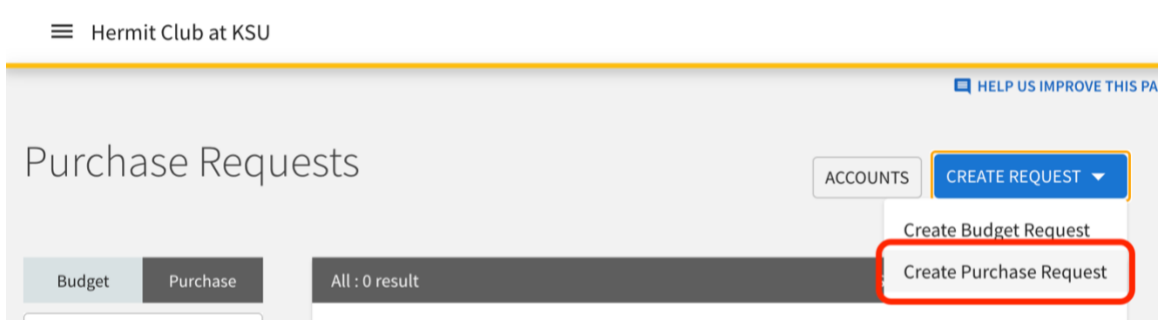
4. Select the “Hamburger” (three horizontal lines) on the left-side of the screen to access your organization’s management drawer.



5. Select “Finance”



6. On the Finance screen, click the blue “Create Request” button and select “Create Purchase Request” from the drop-down menu.



7. On the “Create Purchase Request” please click “Populate from Budget” button at the top right of the form. Once selected, a window will open that will allow you to select a previously approved SABAC Budget Request and connect it to your current Purchase Request.

Create Purchase Request

Request Details

POPULATE FROM BUDGET

- Once you have selected the appropriate budget, you will need to associate your Purchase Request to an already approved Line Item. To do this, please select to which available Line Item this purchase should be charged.

Create Purchase Request

Request Details

CANCEL

← BACK TO ALL BUDGETS

BUDGET SELECTED:

TEST SUMMER 2021

Process: TEST ONLY - FALL 2020 Date Approved: Tuesday, July 13th 2021

Select a line item to continue.

Section: TEST

TEST Supply	\$500.00
TEST Contract	\$500.00
TEST Food	\$500.00

- Complete the required fields in the Request Details section of the Purchase Request form:
 - Subject:** Should be clear and concise, e.g., “Cupcakes for Hermit Club Social”
 - Description:** Please provide context for your request. This will help the Business Manager process your payment and understand any needs your organization may have for this Purchase Request.
 - Requested Amount:** Enter the total of the current Purchase Request. Owl Life will automatically show you the amount of available funds that remains in the associated Line Item within the Budget.
 - Categories:** Please select the Funding Category that most closely matches the requested purchase.
 - Account:** Please select the corresponding Account from which you will be spending funds (most organizations will only have one Account from which to select).

Request Details

POPULATE FROM BUDGET

Selected Budget TEST SUMMER 2021	Selected Line Item (if applicable) TEST Food	X
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*Subject
TEST Food

Description

*Requested Amount
\$ 500.00 \$0.00 remaining of \$500.00 approved total

*Categories
---- Select Category ----

*Account
SELECT...

10. Payee Information: Please share the requested information about the Vendor/Payee to which funds will be disbursed.

- First and Last Name: If the Vendor is an individual, please include their first and last name. If the Vendor is a company/business, please type the company/business name in the First Name box.
- Address Information: Street & Street Continued: Please provide the requested address information for the Vendor.

Payee Information

First Name
Company or Person Name

Last Name

Street

Street Continued (Optional)

City State/Province ZIP/Postal Code

11. Additional Information: To process your Purchase Request, please provide the requested Additional Information, as applicable.

- Funding Category:** Please select the type of funding related to this request. This should mirror what was submitted and approved in your original SABAC Budget Request.
- Event Date:** Provide the date of the program or travel for which the Purchase Request is being made.
- Reservation Confirmation:** If this Purchase Request is related to an event occurring on campus, please provide the Reservation Confirmation Number.

- d. **Previous Use of Vendor:** All Vendors/Payees must be registered in the University System of Georgia Vendor system prior to KSU releasing payment. If you have used this Vendor in the past, please let us know here.
- e. **Links to Items to be Purchased:** Please provide direct URLs to the items your organization would like to purchase and include the desired quantity.
- f. **Reimbursements:** If your organization has already made this purchase, please let us know here.
NOTE: This does not guarantee that the Purchase Request will be approved. RSOs should always have an approved Purchase Request prior to making any purchases. It is always preferred for KSU to process the transaction on behalf of your RSO rather than issuing a reimbursement.
- g. **Additional Comments:** Please share any additional information about the Purchase Request that you would like to communicate to the Business Manager.
- h. **Document Upload(s):** Please upload all documents that related to your Purchase Request. Inadequate documentation may lead to a delay in processing your Purchase Request.

12. Click the blue “SUBMIT REQUEST” button to submit your Purchase Request.

13. Purchase Request Status Definitions:

- a. **Unapproved:** This request is currently “Pending” and has not been reviewed yet.
- b. **Cancelled:** The Purchase Request has ~~been cancelled and the submission process has been~~ ended and the request is not approved. Please review the Comments section for an explanation of cancellation.
- c. **Denied:** The Purchase Request was denied and was not approved. Please review the Comments section for an explanation of denial.
- d. **Approved:** The Purchase Request has been approved and the organization can move forward with the purchase. When a Purchase Request is approved, the associated funds are encumbered and will no longer be included in the calculation of your RSO’s available funds under your Account. Please review the Comments section for any additional information or instructions from the Business Manager on how to process the transaction.
NOTE: It is preferred for the Department of Student Activities to perform all purchases on behalf of the RSO rather than students making direct purchases.
- e. **Completed:** The corresponding transactions for the Purchase Request have been completed and the request process has been closed.
NOTE: Any unused funds that were encumbered in the Approved status will be returned to the RSO’s account.