

OrgSync Funding Module Guide

A Step-by-step guide to requesting funding using the Orgsync funding module

Steps performed by the student organization administrator(s):

1. Log into OrgSync and access your organization's portal → hover your mouse over the tab "More"
 - a. Click on "Treasury" to be directed to the next page

The screenshot shows the OrgSync website interface for Wichita State University. The browser address bar displays the URL <https://orgsync.com/22631/chapter>. The page header includes the WSU logo, "WICHITA STATE UNIVERSITY", a search bar, and links for "Admin" and "My Memberships". The main navigation bar features "Home", "People", "Events", "Files", "Forms", "News", and a dropdown menu labeled "More". The "More" dropdown is open, showing options like "Photos", "Discussions", "Calendar", "Messaging", "Polls", "Bookmarks", "Pages", "Involvement", "To-dos", "Treasury", and "Videos". The "Treasury" option is highlighted with a yellow line and a callout box labeled "Step 1a". The main content area displays a "Welcome to Wichita State and OrgSync!!" message and a sidebar with "Forms" and "Most Recent Photos" sections.

2. Click on “Manage Budgets”

The screenshot shows the Orgsync interface for the 'Treasury' section. At the top, there is a navigation bar with the WSU logo, 'WICHITA STATE UNIVERSITY', a search bar, and links for 'Admin' and 'My Memberships'. Below this is a banner for 'Student Involvement' with the 'WSU System Jmbrell!' logo and a navigation menu (Home, People, Events, Files, Forms, News, More). The main content area is titled 'Treasury' and contains two panels: 'Budgets' and 'Invoices'. The 'Budgets' panel includes a description: 'Manage budgeting and activity funding, including submitting a budget request.' and a prominent orange button labeled 'Manage Budgets'. A white box with the text 'Step 2' is overlaid on the 'Manage Budgets' button. The 'Invoices' panel includes a description: 'Track and maintain an accurate record of outstanding payments owed.' and a button labeled 'Manage Invoices'.

3. Click on “New Budget” to begin the request process

The screenshot shows the Orgsync interface for the 'Budgets' section. At the top, there is a navigation bar with the WSU logo, 'WICHITA STATE UNIVERSITY', a search bar, and links for 'Admin' and 'My Memberships'. Below this is a banner for 'Student Involvement' with the 'WSU System Jmbrell!' logo and a navigation menu (Home, People, Events, Files, Forms, News, More). The main content area is titled 'Budgets' and includes a 'Tool in: Student Involvement Treasury' label. A dropdown menu for 'Period' is set to 'Spring 2015'. A green button labeled 'New Budget' is highlighted with a white box containing the text 'Step 3'. Below the dropdown, a message states: 'There are currently no budgets for the selected budget period.'

4. From here you are required to provide details of your request and upload all supporting documents → this main funding page is broken down into various components:
 - a. “Budget Name” – enter the name of your organization
 - b. “Category” – click the drop down box and select the category of organizational funding your group is requesting (operating, project, travel). Operating consists of items/things that help the organization throughout the organization, projects consists of events, and travel includes trip to conferences, workshops, etc. → Once selected, a budget form will pop up that requires details about the request and provides legislative stipulations as outlined in the SGA Legislative Journal
 - i. The information provided is used in processing the funding request, so it is very important that all answers provided are **accurate**
 - ii. Once all questions are answered, click the “done” box at the bottom of the budget form
 - c. “Name” – the name of the person filling out the request

Wichita State University logo and navigation links (Admin, My Memberships) are visible at the top. The URL in the browser is https://orgsync.com/37439/budget/create_budget_request.

Step 4a Budget Name

Budget Period: Spring 2015

Budget Details

BUDGET ITEM	Category:	Name:	Request a Budget
No. Line Item	-- Select -- Operating Project Travel		0.00
+ Add Line Item			\$ 0.00

Step 4b (points to the Category dropdown)
Step 4c (points to the Name field)

← → ↻ https://orgsync.com/22631/budget/create_budget_request

WICHITA STATE UNIVERSITY Admin My Memberships

Budget Period:
Spring 2015

Operating - Operating Funding Request ✕

Step 4b.i

Organization: **REQUIRED**
Please fill the the complete title of the organization as registered with Student Involvement Center

Category:

Organization Status: **REQUIRED**
If you are unaware of the current status of your organization please contact Student Involvement at 978-3022.

Registered Student Organization

Provisional Status Organization

University / Community

Please list the primary contact for this organization. The contact listed below will be the sole intermediary between your organization and SGA. Be sure that the contact listed below will respond to all forms of communication on a daily basis.

Budget Details

BUDGET ITEM

Category:

No. Line Item

-- Select --

+ Add Lin

Fill Out

This budget ca

+ Add Summary

← → ↻ https://orgsync.com/37439/budget/create_budget_request

WICHITA STATE UNIVERSITY Admin My Memberships

Budget Period:
Spring 2015

Operating - Operating Funding Request ✕

SGA. If this occurs, the organization will be responsible for paying any amount not reimbursed by SGA.

Additionally, I certify that the President, Vice-President, Treasurer, and Advisor are aware of this application for funding in the amount listed for the specified items and approve the expenses to be spent in the name of my organization.

I affirm that my organization is requesting money for the stated purposes. I understand that any and all funds allocated will be used for that purpose.

I affirm that I have read and understand the SGA Organizational Funding policies as described in the Student Government Association Legislative Journal, Section S027.

I certify that I have read and understand the aforementioned Terms & Conditions

Step 4b.ii

Budget Details

BUDGET ITEM

Category:

No. Line Item

-- Select --

+ Add Lin

Fill Out

This budget ca

+ Add Summary

- d. Click the “line item” drop down box and select the type, enter the \$ amount requested under “Request a Budget” → it is to the organizations benefit to provide an exhaustive item description because it gives the SGA reviewers a more informed understanding of the request and can be beneficial when the Budget and Finance Committee presents to Senate before voting
 - i. A description that only lists the item and no explanation will take more time to process because the SGA Treasurer will have to follow up for more information

- e. If you have another category of organizational funding you would like to request, click on “Add Budget Item” and repeat steps 2b-d.

The screenshot shows a web browser window with the URL https://orgsync.com/22631/budget/create_budget_request. The header includes the Wichita State University logo and a search bar. The main content area is a form for creating a budget request. At the top, there is a "Category:" dropdown menu set to "Operating" and a "Name:" text input field. Below this is a table with columns "No.Line Item", "Description", and "Request a Budget". A dropdown menu is open over the "Description" column, showing options: "-- Select --", "Awards/Trophies", "Ceremonial Items", "Name Tags", "Newsletters", "Postage", "Recruitment Items", and "Supplies". A callout box labeled "Step 4d" points to the dropdown menu. Another callout box labeled "Step 4e" points to the "Add Budget Item" button. At the bottom right of the form, there is a "Total for Budget Fund:" label with a value of "\$ 0.00".

- f. “Add Summary” – provide any additional information to support the funding request.
- g. “Upload Documents” – upload the necessary documents required by the respective funding request, as outlined in the pop up budget form.

The screenshot shows a web browser window with the URL https://orgsync.com/37439/budget/create_budget_request. The header is the same as the previous screenshot. The main content area shows the "Add Budget Item" button and a "Total for Budget Fund:" label with a value of "\$ 0.00". Below this is an "Upload Documents" section with the text: "If you need to upload scanned or electronic documents, you can do so here. Max file size is 10 MB." and "There are no uploads for this request." A callout box labeled "Step 4f" points to the "+ Add Summary" button. Another callout box labeled "Step 4g" points to the "Upload" button.

h. Click “Submit” when finished.

← → C https://orgsync.com/37439/budget/create_budget_request

WICHITA STATE UNIVERSITY Search for anything... Admin My Memberships

Total for Budget Fund: 0.00

Upload Documents

If you need to upload scanned or electronic documents, you can do so here. Max file size is 10 MB.

There are no uploads for this request.

Upload

Any Additional Comments?

Write a Comment...

Step 4h

Submit Save & Finish Later

The SGA Treasurer will notify the organization’s contact person that the funding request has been received. Funding applicants are required to attend a Budget and Finance Committee meeting to review the request and answer any questions the committee may have. Pending approval by the committee, the request will then be presented to SGA Senate the following week for final approval/denial. The result will be communicated by the SGA Treasurer to the organization’s contact person.

Any questions can be directed to the SGA Treasurer at 316-978-7062 or sgatreasurer@wichita.edu.