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**THE GEORGE  
WASHINGTON  
UNIVERSITY**

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WASHINGTON, DC

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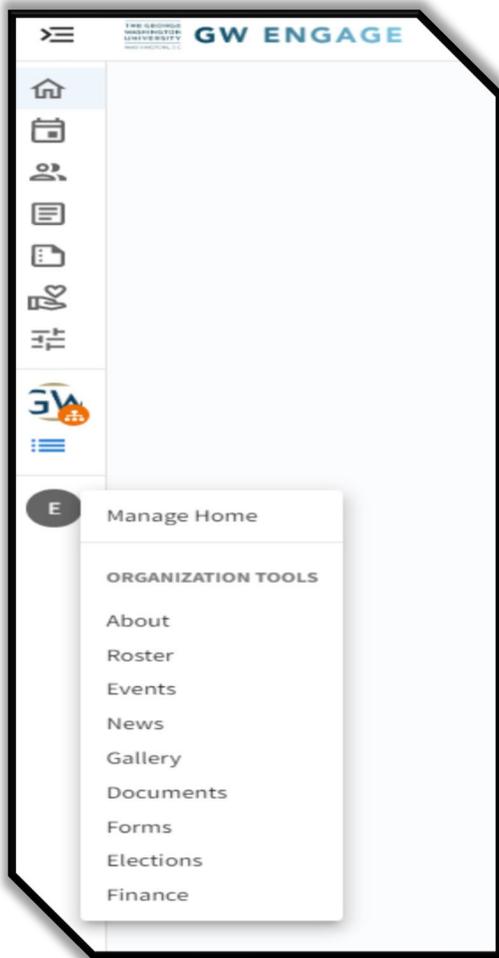
# **Engage Purchase Request Submission Guide**

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# ENGAGE PURCHASE REQUEST SUBMISSION GUIDE

## Steps to Submit a Purchase Request

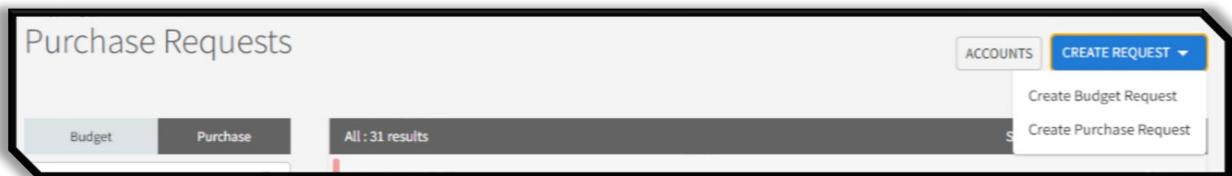


On the Left side of the Home page, select the Organization you are submitting the Purchase Request for.

After selecting the organization, select the Finance option at the bottom of the list.

On the following Purchase Request Page, select the blue Create Request button, then select Create Purchase Request.

*Home Screen*



*Purchase Request Page*

## ENGAGE PURCHASE REQUEST SUBMISSION GUIDE

### Create Purchase Request

#### Request Details

[POPULATE FROM BUDGET](#)

\*Subject

Description

\*Requested Amount

\*Categories

\*Account

#### Payee Information

First Name  Last Name

Street

Street Continued (Optional)

City  State/Province  ZIP/Postal Code

*Purchase Request Form*

If you intend to spend from your organizations SA Budget or Co-Sponsorship, you need to start by selecting the “Populate from Budget” button to select the Budget and Line-Item for the Request.

Only one line-item can be selected per request.

Refer to the Purchase Request Submission Guidelines, Pages 6-7, on the proper way to complete this section of the Request based on the type of Request selected. This will help us process requests more efficiently.

## ENGAGE PURCHASE REQUEST SUBMISSION GUIDE

Request Details CANCEL

Search Budgets

**Select a Budget**  
Showing 1-5 of 6

<b>test 10.1</b> Process: Student Association Co-Sponsorship Request Date Approved: Tuesday, October 1st 2019	\$1.00
<b>test</b> Process: Student Association Co-Sponsorship Request Date Approved: Tuesday, October 1st 2019	\$1.00
<b>glfgkdf</b> Process: Student Association Co-Sponsorship Request Date Approved: Monday, August 19th 2019	\$125.00
<b>Spring Gala</b> Process: Student Association Co-Sponsorship Request Date Approved: Tuesday, August 20th 2019	\$675.00
<b>Fall Event</b> Process: Student Association Co-Sponsorship Request Date Approved: Friday, August 16th 2019	\$700.00

< PREVIOUS NEXT >

*Select a Budget Screen*

Due to Engage not allowing older Budgets and Co-Sponsorships to be archived, you need to be mindful to only select a Current Budget or Co-Sponsorship.

The older budgets and Co-Sponsorships will show balances and funds in them; this is to be used for information purposes only as there are no actual funds backing these up any longer.

If you are unsure what is a Current and Active Budget, refer to the Approved Date underneath the Budget Title

Request Details CANCEL

[← BACK TO ALL BUDGETS](#)

**BUDGET SELECTED:**  
glfgkdf  
Process: Student Association Co-Sponsorship Request Date Approved: Monday, August 19th 2019

Select a line item to continue.

<b>Section:</b> food	
pizza	\$75.00
drinks	\$25.00
<b>Section:</b> decor	
ballons	\$25.00

*Budget Line-Item Screen*

## ENGAGE PURCHASE REQUEST SUBMISSION GUIDE

### Google Forms

Complete the form associated with the specific Purchase Request type. The information asked in these forms allow us to better serve your organization and minimize delays in processing requests. Click on the name associated with your Purchase Request type to access the Google form.

- Check to Vendor
- GW Credit Card
- Petty Cash
- Reimbursement
- Transfers
- Travel (Enterprise)
- Travel (Hotel)
- Travel (Tickets)
- Travel (Campus Rec Only)

*FYI- Petty Cash requests are filled on Wednesday's. The cut-off to have your request filled for the upcoming week is Tuesday by 12pm.*

### Google Forms Section

We have updated this part of the Request process from previous years. No longer will you need to complete and upload the Request Type PDF, they have been replaced with Google Forms that require similar information as before.

Another update from previous years will be that you no longer need to submit the same PDF multiple times if it is a multi-request submission. When submitting the Google Form you will instead list the Engage Purchase Request ID numbers associated.

The Google Forms are submitted after the Engage Request has been submitted. This is because Engage PR ID numbers are not generated until a request has been submitted.

## ENGAGE PURCHASE REQUEST SUBMISSION GUIDE

### Document Upload Section

Upload the correct back up documentation corresponding to the Purchase Request type. Please bundle as many documents into one PDF file as possible.

*Check to Vendor*= Unpaid Invoice, Signed Contract, Donation Memo, or W9 & Honorarium (for Speakers)

*Credit Card*= Unpaid Invoice, or Shopping Cart Screenshots

*Transfers*= Documentation to back up need for a transfer (Only for Departmental and Events/Venues)

*Travel*= Screenshots of desired travel accommodations, or Credit Card Authorization Forms for Hotels

*Reimbursements*= Clear Itemized Receipts, or Paid Invoices

--Online orders must show items as shipped and received

Any purchases of Food (Credit Card or Reimbursement) must be accompanied by Event Marketing material or an Attendees List

Upload #1 (Receipts, Contract, Donation Memo, Credit Card Auth Form, etc)

UPLOAD FILE

Upload #2 (Receipts, Contract, Donation Memo, Credit Card Auth Form, etc)

UPLOAD FILE

Upload #3 (Receipts, Contract, Donation Memo, Credit Card Auth Form, etc)

UPLOAD FILE

Upload #4 (Receipts, Contract, Donation Memo, Credit Card Auth Form, etc)

UPLOAD FILE

Upload #5 (Receipts, Contract, Donation Memo, Credit Card Auth Form, etc)

UPLOAD FILE

\* Is this purchase request related to alcohol, travel, or payment of a contract? If yes, please note that you must be in contact with your staff advisor or the Student Organization Resource Desk via [orghelp@gwu.edu](mailto:orghelp@gwu.edu).

Yes

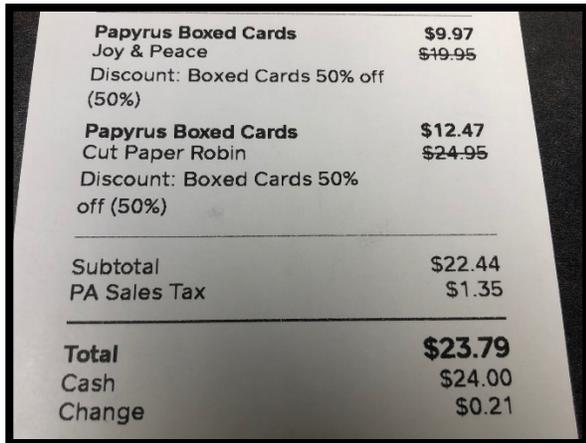
No

### Documents Section

When additional documents are required, bundle them into one PDF if possible and make sure all documents are clearly visible. Make sure pertinent information is not cut off and missing from the documents as well.

Additional documentation is mandatory for all Reimbursement, Check to Vendor, and Food Purchase Requests

# ENGAGE PURCHASE REQUEST SUBMISSION GUIDE



Not Acceptable, Missing Information



Left Itemized, Right Non-Itemized

## ITEMIZED VS. NON-ITEMIZED RECEIPTS

- Itemized=
  - Items and price
  - Date
  - Business name
  - Total
  - ASK FOR!
  - Sub-total or circle "club items"
- Non-itemized=
  - Credit Card receipts
  - Total and no individual items

**Chez Henri**  
www.chezhenri23.com

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Esther  
#16  
1 guest  
EAD5000  
1/7/16, 2:10 PM

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1 Fountain drink	\$1.95
1 Chicken fingers	\$7.95
1 French fries	\$1.95

SUBTOTAL: \$11.85  
TAX: \$0.50

**TOTAL: \$12.35**  
Cash: \$12.35

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TIP SUGGESTIONS  
15%: \$1.78  
20%: \$2.37  
25%: \$2.96

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Chez Henri  
123 Broad Street  
Anytown, NY  
(555) 555-5555  
\*\*CLOSED\*\*

# ENGAGE PURCHASE REQUEST SUBMISSION GUIDE

**Hooli**  
5151 State University Dr, Los Angeles, CA 90032  
Lars1949@teleworm.us

Paid

**Invoice**  
Invoice #: 08/11  
PO #: PO Number  
Invoice Date: 08/02/2017  
Terms: Terms  
Due Date: 08/10/2017

**Billing Information**  
Erich Bachman  
Pied Piper  
5230 Penfield Ave  
**Street 2**  
Woodland Hills CA  
91364  
Phone Number

**Shipping Information**  
Erich Bachman  
Pied Piper  
5230 Penfield Ave  
**Street 2**  
Woodland Hills CA  
91364  
Phone Number

**Sent on -**

Item Name	Price	Quantity	Tax	Subtotal
▶ Palapa	\$1,850.00	1	<input type="checkbox"/>	\$1850.00
▶ Labor per hour	\$17.00	8	<input type="checkbox"/>	\$136.00

**Notes**  
Invoice Notes

**Subtotal:** \$1986.00  
**Tax Rate:** 0.00%  
**Tax:** \$0.00  
**Discount:** \$136.00  
**Shipping:** \$0.00  
**Total:** \$1851.00  
**Amount Paid:** \$1851.00  
 xxxxxxxxxxxx  
**Remaining Balance:** \$0.00

**Footer**

Close Preview

*Paid Invoice*

**Cielo**  
500 Terry A Francois Boulevard  
San Francisco, California 94158-2230  
United States  
rutha@wix.com

**Invoice #0000008**  
Issue Date: Dec 28, 2021  
Due Date: Jan 27, 2022

**Customer Info:**  
**Angela Keton**  
 angleaketon23kes@gmail.com  
 Phone: 555-1200

Product or Service	Price	Quantity	Line Total
Crossfit Dec 29, 2021 3:00 PM	\$20.00	1	\$20.00
<b>Subtotal</b>			<b>\$20.00</b>
<b>Invoice Total</b>			<b>\$20.00</b>
<b>Amount Paid</b>			<b>\$0.00</b>
<b>Balance Due</b>			<b>\$20.00</b>

*Unpaid Invoice*

## Purchase Request Submission Guidelines

### **Subject**

The Subject line in the Purchase Request should be prefaced in the following manner. If the requests are not prefaced this way, the Purchase Request will be reviewed last of that days batch.

- Check to Vendor= CHECK:
- Credit Card= CC:
- Petty Cash= PC:
- Reimbursement= REIMB:
- Transfers= XFER:
- Enterprise= CAR:
- Hotel= HOT:
- Travel Tickets= TIX:
- Campus Rec Travel= CRT:

An example of the Subject line should look like this, PC: Event Supplies.

For Request that are submitted from multiple accounts and/or line items, number them in the order you want them allocated from. Ex. CC: Event Venue (1 of 3)

### **Description**

The following Purchase Request types MUST utilize the Description box to provide the following information. If this information is not provided the request will be denied.

- Transfers= Describe why you are transferring funds to the party you intend to
- Enterprise= List the drivers and their DOB for the trip
- Campus Rec Travel
  - Enterprise= List drivers, number of cars rented, and type of cars rented
  - Hotel= Hotel name and number of rooms booked
  - Travel Tickets= Types of tickets booked, and number of tickets booked

All other Purchase Request types do not require this field to be completed.

If you have received a line-item transfer approval form the SA VPFA, note that in this section.

### **Requested Amount**

This amount should never exceed the amount available in the line item selected or the amount available in the overall account.

### **Account**

If you have selected a line item from your SA budget make sure to select the account ending with "Budget", as this is your SA account.

## Payee Information

The following Purchase Request types MUST utilize the Payee Information section to input either the Student or Vendor's name. You can skip the address portion, as it is provided in the Google Form.

- Reimbursements= The student being reimbursed and their Local Banner Address
- Check to Vendor= Must match the address provided on the invoice or contract

All other Purchase Request types do not require this section to be completed

## Google Forms

Complete the appropriate form for the Purchase Request being submitted. The Google form should not be completed until you have submitted the Purchase Request(s) in Engage. This is because you will need the Request ID Number, which is not generated until after the Purchase Request is submitted in Engage.

## Document Upload Section

Back Up documentation needs to be uploaded for Reimbursement, Check to Vendor, and Food Purchase Requests. For the other Request we have outlined the types of documents you may provide. If the proper documentation is not provided the Purchase Request will be denied.

- Check= Unpaid Invoice, Signed Contract, Donation Memo, or W9 & Honorarium (for Speakers)
- Credit Card= Unpaid Invoice, or Shopping Cart Screenshots
  - Food Purchases require Event Marketing materials provided upfront
- Transfers= Documentation to back up need for a transfer (Only for Departmental and Events/Venues Transfers)
- Travel= Screenshots of desired travel accommodations, or Credit Card Authorization Forms for Hotels
- Reimbursements= Clear Itemized Receipts, or Paid Invoices
  - Food Purchases require Event Marketing materials or an Attendees List
  - Online orders must show items as shipped and received

