William & Mary
TribeLink

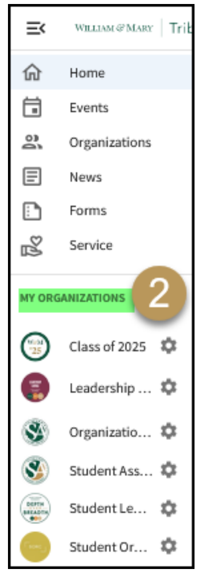
How To Submit a Budget Request

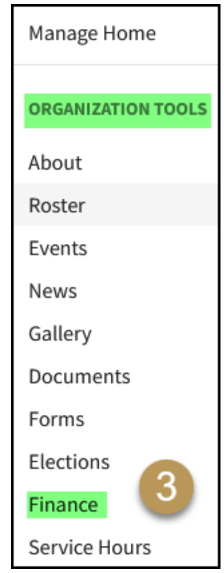
The TribeLink Budgeting module allows organizations to request funding from the Student Assembly or Media Council This system allows for better organization of budgets and streamlines the review/approval process. Only members of the organization with access to the Finance function will be able to submit/view budget requests. Make sure your positions have been created and assigned to grant access to the appropriate members. You can learn more about creating and assigning positions through the TribeLink "Manage Your Roster" guide.

General Information to Access Finance in TribeLink

To submit a Budget Request, you will first need to access the organization's Finance page within TribeLink.

1) Log into TribeLink (tribelink.wm.edu)
2) Click on the gear icon next to your organization name in the left hand menu on your screen under "My Organizations"; this will open a menu of organization tools. If you have not expanded the left hand menu, simply click on the organization profile picture and this will open the menu of organization tools.
3) Select "Finance"

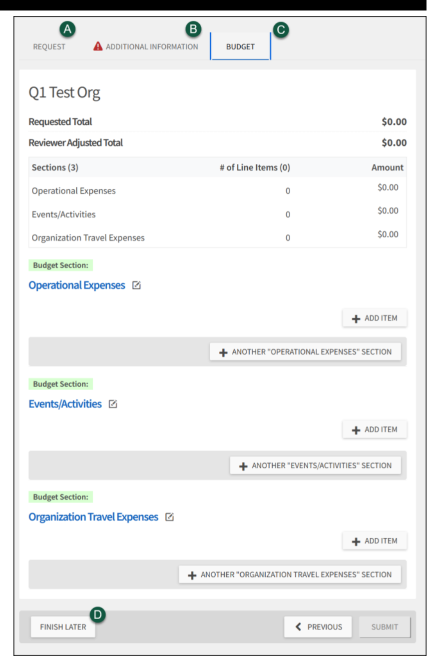




On the Finance page, click on the blue "Create Request" button (A) and from the drop down, select "Create Budget Request." You can view the status and comments of already submitted Budget Requests by clicking the "Budget Request" tab (B). If you are having trouble finding a specific budget request, double check the filters below the "Budget/Purchase" tab; we recommend you select "All Statuses" and "All Processes" when doing a general search.

Submitting Your Budget Request

Select a Process or Budget to start your request. By scrolling down, you'll be able to select a process that is currently available and accepting request. If you are not able to finish the entire request in one sitting, you may click the "Finish Later" button (D) at the bottom of the screen and resume work on it later. To access the request in progress, you will select "My Submissions" from the user drawer (click on the profile picture/initial in the top right corner of the screen); then go to "Budgeting" - you will find your budget request in progress here.



Request Details (A)

- Request Title - Provide a concise/descriptive name for your request. Make this a title that will be easy to identify in the future, example, include the quarter and the name of the organization, for example. "Q1 Test Organization"
- Description - Provide a general explanation/justification for your request

Additional Information (B)

Each process requires additional information, which will vary between the different processes. Please answer all of the "Additional Information" questions to the best of your ability. Incomplete information may result in delay of processing or denial of the request.

Budget (C)

The Budget tab will include the total amount you are requesting, the total adjusted amount (after it has been reviewed). As you add line items to your budget, the top section will keep a running total of your request, separated by sections.

Using and Customizing Sections:

Sections are groupings or categories of spending for related line items. Examples of sections include: Operational Expenses, Events/ Activities, Travel, etc.. You should edit the name of sections to match the name of your event, trip, or activity; do this by clicking the "edit" icon next to the Budget Section name/title.

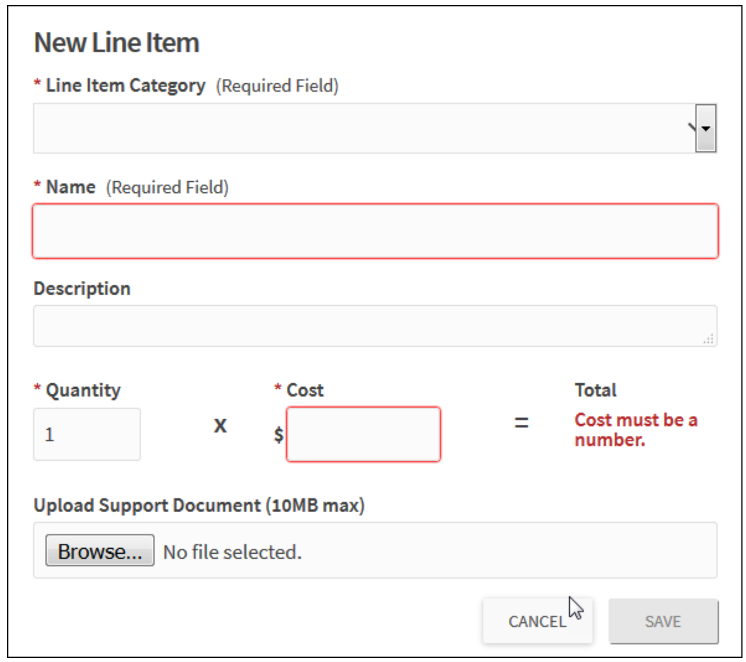
If you have multiple events, trips, or activities, you can add additional sections; you should not "lump sum" multiple events/trips/ activities in one section; you must create and name separate sections by clicking the "+ Another Section" button. This allows you to customize the budget request to better represent your organization's needs. For example, the organization is requesting funding for a fall speaker and a spring speaker. Create one event section and edit the name to "Fall Speaker," then add another section and name it "Spring Speaker". Under each section add line items for that specific event.

Adding Line Items:

(1) Find the section of the budget that corresponds with what you need funding for.

(2) Click the "+Add Item" button to add a line item to your budget request; this will open a pop-up window

- Line Item Category - Select an option from the dropdown menu.
- Name - identify the item/service you are requesting funding for. Be sure to include the event name with the item name, for example: "Spring Speaker flyers" Spring Speaker is the Event, flyers is the item name.
- Description - Provide a description of why the item/service is relevant to your request, please include the vendor/ service provider information if applicable (additional information will be required in the Purchase Request submission)
- Quantity and Cost - Itemize the expense
- Support Document - upload supporting documentation (optional)



(3) Repeat the process above as many times as you need in order to complete your Budget Request.

(4) If you need to come back and work on the Budget Request later, just click "Finish Later." Don't forget to SUBMIT when you are done!

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Additional Questions?

If there are any questions please contact the Student Financial Operations Specialist at jtborzillo@wm.edu.