

# GTF Check Request Quick Guide

## User Guide: How to Submit a GTF Check Request Form in Fusion

To submit a GTF Check Request in Fusion, follow these steps.

1. Navigate to Fusion at [techtools.gatech.edu/fusion/](http://techtools.gatech.edu/fusion/) and use your GT credentials to log in if prompted. If you try logging in and you realize you do not currently have access to Fusion, you will need to [submit a request to gain access](#).
2. Beginning in the navigation bar on the left, click **Forms** > **GTF Check Request** > **Create Order**. This will pull up a blank GTF Check Request form.
3. Fill in the fields at the top of the blank GTF Check Request form.
4. In the Exceptions section of the form, review the list of exceptions to the left and then select **Yes** or **No** if any of the exceptions are applicable to your request. If you select **Yes**, provide a brief description of the exception(s) relevant to the form.
5. All GTF Check Requests will be reimbursed through ACH Transfer. Your Cost Center will have exchanged ACH information with the foundation outside of the Fusion application. Select **Call for Pickup** and provide your contact information in the event there are additional questions.
6. Use the following section of the form to enter an itemized list of the charges for this GTF Check Request form, their associated GTF drivers and amounts. To add another line item, click the **+Add Line** button. To delete a line item, click the **Delete** button.

Driver	Amount
<input type="text" value="Search for a Driver by Ref #..."/>	\$ 0
	<input type="button" value="Delete"/>
<input type="text" value="Search for a Driver by Ref #..."/>	\$ 0
	<input type="button" value="Delete"/>
Total:	\$ 0.00

7. In the Attached Documentation section at the bottom of the form, attach any files that would be relevant for this GTF Check Request. This could include but is not limited to pictures of receipts, lists of attendees, specific exceptions forms, etc..
8. When you've finished filling out the form and have ensured that all information entered is correct, click **Submit**. If there is an error on the form and want to start over, click **Reset** to clear the form and begin again.
9. At this point the submitted GTF Check Request form will begin the approval workflow (see the last section of this guide for a detailed explanation of the workflow). You will be able to see who has approved the form by looking at the Completed Approvals grid that displays at the bottom of the form once it's submitted. When the form completes the approval process, you will be emailed a copy of the updated PDF when you receive the notification of the approval.

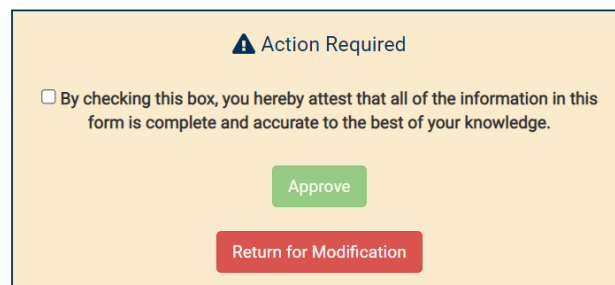
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## Approver Section: How to Approve or Deny a GTF Check Request Form in Fusion

Once a GTF Check Request form is submitted in Fusion, the form will begin the approval workflow.

If a GTF Check Request form requires your approval, then you should receive an email notification. To approve or deny a GTF Check Request form, follow these steps.

1. Navigate to the GTF Check Request form that was submitted for your approval in one of two ways:
  - a. Click the link in the email that you received notifying you of the form awaiting your approval.
  - b. Log in to Fusion > click **Forms** in the navigation bar > **GTF Check Request** > **View/Edit Order** on the GTF form that you want to review and is ready for your approval in the GTF Action Items grid.
2. Scroll to review the entire GTF Check Request form, including the fields at the top, Exceptions, the itemized list of charges, attached documentation, and other people who have approved the form so far.
3. At the top of the open GTF Check Request form, you will see an Action Required box. Once you have reviewed the information on the form, you can either approve the form by checking the attestation in the box and clicking **Approve**, or you can return the form to the submitter for modification by clicking **Return for Modification** and leaving a comment with what needs to be changed.



▲ Action Required

By checking this box, you hereby attest that all of the information in this form is complete and accurate to the best of your knowledge.

Approve

Return for Modification

**PLEASE NOTE:** If you approve, the form will automatically be routed to the next step in the approval workflow. If you return a form to the submitter for modification, the submitter will need to make the appropriate changes, resubmit the form, and the approval process will start over.

4. If you need to make any edits to the form before you approve it, click **Edit** at the bottom of the screen, make the necessary changes, then click **Submit**. Once you submit the changes, the form will be automatically approved and give you a time stamp of the approval at the top of the form.

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## General: GTF Check Request Form Approval Workflow

The approval workflow for a GTF Check Request form in Fusion is as follows:

- ALWAYS REQUIRED:** a finance admin from the Cost Center associated with the driver for each line item on the form.
  - NOTE:** this could be one finance admin or multiple finance admins, depending on the number of line items submitted on the form and if those line items all roll up to the same Cost Center or different Cost Centers that have different finance admins.
- CONDITIONAL:** IF the form has exceptions, then a division approver associated with the requestor's Cost Center is required to approve the form after the finance admin level of approvals.
- CONDITIONAL:** IF the form has exceptions, then an executive approver associated with the requestor's Cost Center is required to approve the form after the division approval.
- CONDITIONAL:** IF the form is marked as requiring presidential approval, then a presidential approver (someone in the president's office) is required to approve the form.
- ALWAYS REQUIRED:** a Georgia Tech Foundation approver is required to approve the form at the end of the approval workflow.

