HOW TO ENTER TAR

THE WEBSITE IS: DOCUTRAQ.SG.UFL.EDU

Step 1: To create a new TAR [Travel Activity Request], the form needed to initiate a procurement for Travel. Click the green “CREATE NEW SAR” button on your dashboard.

Dashboard: Test Organization

Step 2: Select the type of SAR you require

Remember: Travel SAR’s are only if select organizational members are going to travel. These trips must be budgeted in your organizational budget and approved before the Budget and Appropriations Committee.

Step 3: Once you select a type of request, a drop down with information will emerge. Please read the information as it contains important tips and guidelines according to the type of request that you will be submitting. After reading the information go ahead and click “Get Started”.
Step 4: After clicking “Get Started” you will then be asked to confirm that is in fact the type of request you would like to submit.

Step 5: The information page is where you will input the contact info for the request. Please remember whoever is listed as the contact person will receive notifications during the processing of the request. This is the person our office will contact if any questions arise.

NOTE: The fifth line down on this page asks for the Budgeted Project number. Your budget lists projects/events in a numeric sequence. The Budgeted Project Number is found beside each project in the budget. This number is **REQUIRED** in order to match your request to your budget.
Step 6: Next you will see the vendor selections page in which you will select the vendor. The vendor is the person being reimbursed. If the vendor for your request is not in the system please select “Add New Vendor” and add them.

Note: Please be aware that you will need the vendor’s name, address, phone number, e-mail and their UFID.

Note: Please do not put your UFID with someone else’s name. This only leads to confusion and can slow down the process.

Note: All travel is a reimbursement.
Step 7: Once you have selected a vendor you will be able to add the items you wish to purchase. To do so click “Add item”.

Step 8: A new feature of Docutraq is to display the available balance beside budgeted lines for your group. The request will charge whatever line you pick provided there is sufficient funds left in that line. Note: You can only use line 10 or line 13 for travel.

Once you have selected your line you can then fill out the information regarding what you are purchasing. Please complete each box to ensure the request can be processed.
Step 9: Once you add your item you will have the option to add additional items.

Once you have added all the items you wish to include in the request, click the “Next” button to review your request before submitting.

Step 10: The last page you will see before submitting your request will be the review page where you can do a last minute check on all information. Once you have reviewed all the information you can click the submit button.
Review Your Request

Basic Information
- TAR Title: TEST
- Contact Name: Michele Williams
- Email: mwilliams@ag.uff.edu
- Phone Number: (352) 273-4405
- Budgeted Travel Number: 2

Vendor Information
- Name: John Test
- Address: 1234 SW Archer Rd
- City: Gainesville
- State: FL
- Zip: 32611
- Phone: (352) 123-4567
- Email: test@uff.edu

Travel Form
- Pay Up To: $1,000
- Number of Travelers: 1
- Departure Date: 08/29/2013
- Return Date: 08/29/2013
- Outside the USA?: TEST
- Purpose of Trip: TEST, FLORIDA
- Destination: TEST SAR
- Benefit to UF: TEST SAR

Line Items
- Transportation Items
  Add Item
<table>
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<tr>
<th>Line</th>
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<th>Amount</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>10</td>
<td>Airline</td>
<td>1000</td>
<td>$1.00</td>
<td>test travel</td>
<td>$1.00</td>
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</table>

Other Items
- Add Item
  There are no items.
One of the new features to Docutraq is the verification page that tells you the system is processing the information provided. This verification page will show that you have necessary funds and the request is complete.

Congratulations! You finished your request. You can now view a PDF version of your request to keep for your records. We highly recommend that you either save it or print it just in case any problems should arise in the future.
IMPORTANT REQUEST INFORMATION

The first and most important rule? You cannot spend activity and services fees without the prior approval of the Student Body Treasurer!

- Meaning: If you have not received an email that the Student body Treasurer has approved your request you CANNOT UNDER ANY CIRCUMSTANCES spend money!!
- If you spend money before approval, SG Finance is NOT LIABLE for the payment to a vendor. YOU ARE!!

The second most important rule? Only expenses made by UF students may be reimbursed on trips. (No staff, advisor, chaperone costs, p-cards) SG will not reimburse departments.

- SARs must be received by the SG Finance a minimum of 10 Business Days before the travel is needed.
- All receipts must be itemized and turned in within 30 days of date of purchase. All receipts for a given request must be turned in at the same time, and the individual being reimbursed must bring in their own receipts.
- Travel is always done as a reimbursement.
- All travel must have prior approval of the Student Body Treasurer using Travel Activity Request in Docutraq system.
- You are responsible for researching and choosing reasonable accommodations and travel means at the lowest possible cost.
- All travel is half funded.
- All travel activity requests (TARs) must be turned in to the Student Government Finance office at least ten business days before the trip takes place.

What SG will not reimburse:

- Personal phone calls
- Meals/food
- Room Service
- Lost or damaged personal items
- Safe
- Valet/Portage / Taxi Tips
- Personal travel insurance
- Laundry
- Mileage
- Personal expenses
- Movie rentals
- Fines for traffic violations
## CONTACT INFO:

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Responsibilities</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Body Treasurer</td>
<td></td>
<td>Budgets, 800 codes</td>
<td><a href="mailto:treasurer@sg.ufl.edu">treasurer@sg.ufl.edu</a></td>
</tr>
<tr>
<td>Business Manager</td>
<td>Stanley Beckerdite</td>
<td>Budgets, 800 Codes, Docutraq, Travel</td>
<td><a href="mailto:sbeckerdite@sg.ufl.edu">sbeckerdite@sg.ufl.edu</a></td>
</tr>
<tr>
<td>Sr. Fiscal Assistant</td>
<td>Michele Williams</td>
<td>Docutraq, Deposits, Budgets, Travel</td>
<td><a href="mailto:mwilliams@sg.ufl.edu">mwilliams@sg.ufl.edu</a></td>
</tr>
<tr>
<td>Office Assistant</td>
<td>Chris Burdsall</td>
<td>Paying Vendor Invoices, Blue Slips</td>
<td><a href="mailto:cburdsall@sg.ufl.edu">cburdsall@sg.ufl.edu</a></td>
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