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

Student Activity Requests (SAR)

15 Total SARs
3 Pending SARs

+ CREATE NEW SAR

Your Budget

Get detailed information about your organization's budget.

View Summary

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 you organizational budget and approved before the Budget and Appropriations Committee.

Logged into: Test Organization	Dashboard	View SARs	Your Budget	My Approvals	Change the General Password	Log Out

Create a New SAR

1. Select a Request Type

2. Enter the Basic Info

3. Select a Vendor

4. Enter Your Items

5. Review Your Request

6. Verifying Your Request

7. Finish the SAR

Select a Type of SAR

The decision at this point is whether you are creating a Student Activity Request (SAR) to buy goods and services or whether you want to create a Travel Activity Request (TAR).

Anything that is not related to travel where you leave the city of Gainesville and UF property is procured under the "Goods and Services" section of the Docutraq system.

Goods and Services

Travel

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 ".

Select a Type of SAR

The decision at this point is whether you are creating a Student Activity Request (SAR) to buy goods and services or whether you want to create a TAR (TAR).

Anything that is not related to travel where you leave the city of Gainesville and UF property is procured under the "Goods and Services" section of the Docutraq system.

Goods and Services

Travel

- All travel authorization forms (TARs) must be turned in to the Student Government Finance office at least *ten (10) business days* before the trip takes place.
- Travel is always done as a reimbursement.
- All travel must have prior approval of the Student Body Treasurer.
- You are responsible for researching and choosing reasonable accommodations and travel means at the lowest possible cost.
- All travel is half funded.
- You have 30 days from travel return to turn in receipts to SG Finance.

Transportation and Lodging:

- You must travel in the most economical manner. Transportation must be documented in the same way as registration.
- If you are sharing a room with a person not on University business, provide receipt of single room rate. Receipts must show room rate and taxes.

Create a New SAR

1. **Select a Request Type**
2. Enter the Basic Info
3. Select a Vendor
4. Enter Your Items
5. Review Your Request
6. Verifying Your Request
7. Finish the SAR

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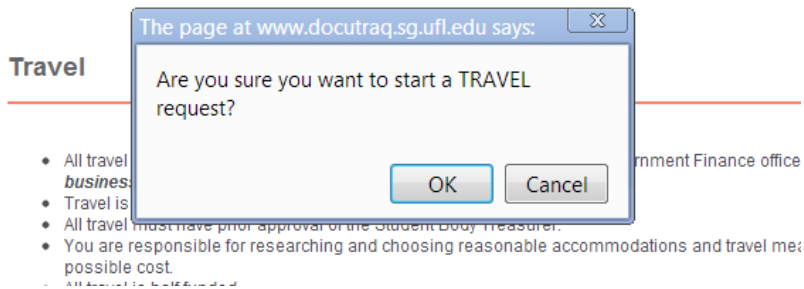
Step 5: The information page is where you will input the contact info for the request. Please remember whoever is listed as the contact person will receive notifications during the processing of the request. This is the person our office will contact if any questions arise.

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.

Basic Information

SAR Title	
Contact Name	Michele / Williams
	First Name / Last Name
Email	mwilliams@sg.ufl.edu
Phone Number	(352) 273-4406
Budgeted Project Number	If using Outside Revenue for this request, please enter 99 for the project number.

Cancel   Next

Create a New SAR

1. Select a Request Type
2. **Enter the Basic Info**
3. Select a Vendor
4. Enter Your Items
5. Review Your Request
6. Verifying Your Request
7. Finish the SAR

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.

Select a Vendor

Create a New SAR

1. Select a Request Type
2. Enter the Basic Info
3. **Select a Vendor**
4. Enter Your Items
5. Review Your Request
6. Verifying Your Request
7. Finish the SAR

Search For: [   ]   Search   + Add New Vendor

◉ Name ◯ Vendor ID ◯ City ◯ Email
☐ Include Deleted

Previous   Next

Select a Vendor

Create a New SAR

1. Select a Request Type
2. Enter the Basic Info
3. **Select a Vendor**
4. Enter Your Items
5. Review Your Request
6. Verifying Your Request
7. Finish the SAR

This is the currently selected vendor. Change Vendor

Name	John Test
Address	1234 SW Archer Rd
City	Gainesville
State	FL
Zip	32611
Phone	(352) 126-4567
Email	test@ufl.edu

Previous   Next

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 "

Logged into: Test Organization	Dashboard	View SARs	Your Budget	My Approvals	Change the General Password	Log Out

Create a New SAR

1. Select a Request Type

2. Enter the Basic Info

3. Select a Vendor

4. Enter Your Items

5. Review Your Request

6. Verifying Your Request

7. Finish the SAR

Add Items

+ Add Item

Line	Date	Description	Quantity	Unit Price	Estimated Cost
Total: 0					Total Estimated Cost: $0.00

« Previous   Next »

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.

Add a new Item ✖

Select a Budget Line

02 - PROGRAMS	$89.00 Available
05 - SUPPLIES	$0.00 Available
06 - ADVERTISING	$0.00 Available
13 - OUTSIDE REVENUE (OSRV)	$0.00 Available
16 - AWARDS	$0.00 Available
43 - OFF CAMPUS VENUE RENTAL	$0.00 Available
57 - COPIES	$0.00 Available
66 - FOOD	$0.00 Available

Cancel

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.

Create a New SAR

1. Select a Request Type

2. Enter the Basic Info

3. Select a Vendor

4. Complete Travel Form

5. Enter Your Items

6. Review Your Request

7. Verifying Your Request

8. Finish the SAR

Travel Form for "TEST"

Number of Travelers	1
Departure Date	08/28/2013
Return Date	08/29/2013
Outside the USA?	☐
Purpose of Trip	TEST
Destination	TEST, FLORIDA
Benefit to UF	TEST SAR

[Previous] [Next]

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.

Transportation Items

⊕ Add Item

Line	Mode	Miles	Amount	Description	Pay Up To	
10	Airline	1000	$1.00	test travel	$1.00	Edit / Delete

Other Items

⊕ Add Item

There are no items.

[« Previous] [Next »]

⚙

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@sg.ufl.edu
Phone Number	(352) 273-4406
Budgeted Travel Number	2

Vendor Information

Name	John Test
Address	1234 SW Archer Rd
City	Gainesville
State	FL
Zip	32611
Phone	(352) 126-4567
Email	test@ufl.edu

Travel Form

Pay Up To	$1.00
Number of Travelers	1
Departure Date	08/28/2013
Return Date	08/29/2013
Outside the USA?	☐
Purpose of Trip	TEST
Destination	TEST, FLORIDA
Benefit to UF	TEST SAR

Line Items

Transportation Items

⊕ Add Item

Line	Mode	Miles	Amount	Description	Pay Up To	
10	Airline	1000	$1.00	test travel	$1.00	Edit Delete

Other Items

⊕ Add Item

There are no items.

« Previous   Submit »

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.

| Logged into: Test Organization | Dashboard | View SARs | Your Budget | My Approvals | Change the General Password | Log Out |

Create a New SAR

1. Select a Request Type
2. Enter the Basic Info
3. Select a Vendor
4. Enter Your Items
5. Review Your Request
6. Verifying Your Request
7. Finish the SAR

Verifying Your Request

Screening for fund availability: "02 - PROGRAMS" (1 of 1)

0%

Success!

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.

| Logged into: Test Organization | Dashboard | View SARs | Your Budget | My Approvals | Change the General Password | Log Out |

Create a New SAR

1. Select a Request Type
2. Enter the Basic Info
3. Select a Vendor
4. Enter Your Items
5. Review Your Request
6. Verifying Your Request
7. Finish the SAR

All Finished!

Congratulations! Your request has been received and processed. A confirmation PDF was sent to: mwilliams@sg.ufl.edu

⊙ Download as PDF

SAR Overview   **123-106372**

Contact: Michele Williams
mwilliams@sg.ufl.edu
(352) 273-4406

President: Jeffrey Schmidt
jeffreys@union.ufl.edu

41871380

Treasurer: Jeffrey Schmidt
jschmidt@sg.ufl.edu
3522730318
1234-5678

Vendor: John Test
1234 SW Archer Rd
3522730318
Gainesville FL, 32611
PROTECTED INFORMATION
test@ufl.edu

Items

Line Number	Date	Description	Quantity	Price	Estimated Cost
02	6/24/2013	test sar	1	$2.00	$2.00

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

Student Body Treasurer		Budgets, 800 codes	**treasurer@sg.ufl.edu**
Business Manager	**Stanley Beckerdite**	Budgets ,800 Codes, Docutraq, Travel	**sbeckerdite@sg.ufl.edu**
Sr. Fiscal Assistant	**Michele Williams**	Docutraq, Deposits, Budgets, Travel	**mwilliams@sg.ufl.edu**
Office Assistant	**Chris Burdsall**	Paying Vendor Invoices, Blue Slips	**cburdsall@sg.ufl.edu**