

# HOW TO ENTER AN SAR

**Step 1: To create a new SAR [Student Activity Request], the form needed to initiate a procurement for a Goods/Service or 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
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### 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 SAR a drop down with information will emerge. Please read the information as it contains important tips and guidelines according to the type of SAR that you will be submitting. After reading the information go ahead and click “ Get Started “.**

## Create a New SAR

### 1. Select a Request Type

2. Enter the Basic Info
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## Select a Type of SAR

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### Goods and Services

To use Activity and Service Fee funds a Student Activity Request (SAR) must be created **AT LEAST 10 BUSINESS DAYS prior to event/project start date.**

Examples of which Line item to use when completing the process:

Honorariums – When you plan on paying a person(s) for performance of a service, such as a speaker, musical performance or a professional service provided by someone with special skills and talents. **NOTE REQUESTS TO PAY HONORARIUMS/CONTRACTS MUST BE SUBMITTED A MINIMUM OF ONE (1) MONTH IN ADVANCE OF THE PERFORMANCE DATE!**

Office Supplies – material used in a student organization office.

Program Supplies – material used in the course of putting on an event/project

Advertising – flyers, materials bought to promote an event/project.

Awards – can only be spent on awards given to UF students who have won a competition.

Food – maximum amount of \$2.00 per UF student eating the food for any given event/project.

Outside revenue – these are funds raised by an organization through donations and fund raising events. These funds are the **ONLY** funds you can use **AFTER** a procurement has occurred. The only restriction on this funding source, is they cannot be used to procure alcohol for human consumption.

Reimbursements – When you plan to use your own money and ask to be reimbursed for the expenditure. Remember you are the vendor in this case, not the establishment from which you bought the material. Examples of reimbursement expenditures: Facebook Ads; Wal-Mart purchases, food, decorations for an event, etc. If this is the first time you are asking to be reimbursed, you will need to add yourself to the vendor file. **USE ONLY your UFID number** in this system, **do not use your SSN!**

Get Started »

**Step 4: After clicking “ Get Started “ you will then be asked to confirm that is is fact the type of SAR you would like to submit.**

flyers, materials bought to promote an event/project.

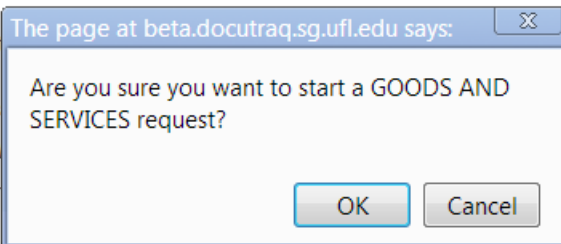
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to be reimbursed, you will need to add yourself to the vendor file. **USE ONLY Y...**



**Step 5: Information page in which you will input the contact info for the SAR. Please remember whoever is listed as the contact person of the SAR will receive notifications during the processing of the SAR. This is the person our office will contact if any questions arise regarding the SAR submitted.**

**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 at the top of each project in the budget. This number is REQUIRED in order to match the SAR to a budgeted request.**

Logged into: Test Organization	Dashboard	View SARs	Your Budget	My Approvals	Change the General Password	Log Out
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**Create a New SAR**

- Select a Request Type
- 2. Enter the Basic Info**
- Select a Vendor
- Enter Your Items
- Review Your Request
- Verifying Your Request
- Finish the SAR

### Basic Information


SAR Title

Contact Name    
First Name Last Name

Email

Phone Number

Budgeted Project Number  If using Outside Revenue for this request, please enter 99 for the project number.



**Step 6: Next you will see the vendor selections page in which you will select the vendor from the system that you will be purchasing or acquiring you good and/or services from.**

**If the vendor for your SAR 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 Fed number or 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: For reimbursement SAR’s, the person being reimbursed is the Vendor, not the store from which he/she bought the material.**

Logged into: Test Organization	Dashboard	View SARs	Your Budget	My Approvals	Change the General Password	Log Out
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**Create a New SAR**

- Select a Request Type
- Enter the Basic Info
- 3. Select a Vendor**
- Enter Your Items
- Review Your Request
- Verifying Your Request
- Finish the SAR

### Select a Vendor

Search For:

Name  Vendor ID  City  Email

Include Deleted

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 Vendor

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 “**

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 by budget lines for your group. The SAR will charge whatever line you pick provided there is sufficient funds left in that line.**

**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 will then fill out the information regarding what you are purchasing. Please complete each box to ensure the request can be processed.**

**Add a new Item** ✕

Quantity:

Price:

Estimated Cost:

Date of Event:

Description:

Line Number:  ▼

**Step 9: Once you add your item you will have the option to add additional items. The additional item(s) may be directed against any Line Number that is active in your budget. Simply use the drop down box to change Line Number.**

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

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

**Create a New SAR**

- Select a Request Type
- Enter the Basic Info
- Select a Vendor
- 4. Enter Your Items**
- Review Your Request
- Verifying Your Request
- Finish the SAR

### Add Items

+ Add Item

Line	Date	Description	Quantity	Unit Price	Estimated Cost	
02	6/24/2013	test sar	1	\$2.00	\$2.00	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

Total: 1 Total Estimated Cost: \$2.00

**Step 10: The last page you will see before submitting your SAR 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.**

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

**Create a New SAR**

- Select a Request Type
- Enter the Basic Info
- Select a Vendor
- Enter Your Items
- 5. Review Your Request**
- Verifying Your Request
- Finish the SAR

### Review Your Request

**Basic Information**

SAR Title: TEST  
 Contact Name: Michele Williams  
 Email: mwilliams@sg.ufl.edu  
 Phone Number: (352) 273-4406  
 Budgeted Project Number: 1

**Vendor Information**

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

**Line Items**

Line	Date	Description	Quantity	Unit Price	Estimated Cost	
02	6/24/2013	test sar	1	\$2.00	\$2.00	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

Total: 1 Total Estimated Cost: \$2.00

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 SAR is complete.

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

**Create a New SAR**

- Select a Request Type
- Enter the Basic Info
- Select a Vendor
- Enter Your Items
- Review Your Request
- Verifying Your Request**
- Finish the SAR

**Verifying Your Request**

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

0% Success!

**Congratulations! You finished an SAR. You can now view a PDF version of your SAR 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**

- Select a Request Type
- Enter the Basic Info
- Select a Vendor
- Enter Your Items
- Review Your Request
- Verifying Your Request
- 7. Finish the SAR**

**All Finished!**

Congratulations! Your request has been received and processed. A confirmation PDF was sent to: [mwilliams@sq.ufl.edu](mailto:mwilliams@sq.ufl.edu)

Download as PDF

**SAR Overview** **123-106372**

**Contact:** Michele Williams  
[mwilliams@sq.ufl.edu](mailto:mwilliams@sq.ufl.edu)  
 (352) 273-4406

**President:** Jeffrey Schmidt  
[jschmidt@sq.ufl.edu](mailto:jschmidt@sq.ufl.edu)  
 41871380

**Treasurer:** Jeffrey Schmidt  
[jschmidt@sq.ufl.edu](mailto:jschmidt@sq.ufl.edu)  
 3522730310  
 1234-5678

**Vendor:** John Test  
 1234 SW Archer Rd  
 3522730318  
 Gainesville FL 32611  
 PROTECTED INFORMATION  
[test@ufl.edu](mailto:test@ufl.edu)

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

# IMPORTANT SAR 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 SAR 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!!**
- SARs **MUST BE** received by the SG Finance a minimum of 10 Business Days before the good or service requested is needed.
  - SAR's that require **CONTRACTS MUST BE** in the Finance office at least 30 Days BEFORE the speech / performance. Performers that are traveling from overseas require up to 16 weeks' notice.
    - When do I need a contract?
      - All personal services provided to a Student Government funded organizations must be contracted prior to the rendering of those services.
      - **Following examples all require a contract:**
        - Lectures
        - Speakers
        - Bands
        - Performers of any kind [Ex: DJ's; instructors; Judges; etc.]
        - Professional fees
        - Honorariums etc.
        - Bounce houses
- If you need to be reimbursed, all receipts must be itemized and turned in within 30 days of date of purchase. All receipts for a given SAR must be turned in at the same time, and the individual being reimbursed must bring in their own receipts.
- Frequently Asked Questions:
  1. What are line items in an SAR?



- Programs: Anything that does not fall within any of the categories listed below.
- Advertising: Aimed at the Student Body.
  - Fliers.
  - Facebook Ads; twitter etc.
  - Tarps/banners.
  - newspaper ads.
- Food: food that will be served at your event.
  - If at the Reitz Union it MUST BE ORDERED THROUGH Classic Fare.
  - All events serving food must be advertised and served buffet style.
  - Maximum amount is \$3.00 per person.
- Copies: All copies must be made through the SG Copy Center.
  - Funds are controlled by SG Administration see Student Government front desk to place an order for copies.
- Awards :
  - No more than \$30 per award.
  - Given to individuals participating in some sort of competition.

## 2. Deposits:

- **ALL CHECKS MUST BE MADE OUT TO UNIVERISTY OF FLORIDA.**
- Deposits are taken from 8 to noon and 1 p.m. to 3:30 during normal business days.
- All funds must be turned in to SG Finance within 15 calendar days from date on the check.

## 3. CANCELATIONS FEES: Policy is NOT to pay cancellation fees for the Reitz Union meeting rooms or ballrooms using A&S funding. They must be charged to Outside Revenue (OSRV).

## 4. Travel:

- Expenses paid by UF PCARDS from other UF departments will not count as an expense to you and SG Finance will not reimburse another UF department.
- Receipts MUST be brought to SG Finance by person being reimbursed.
- Once Expense Report is completed, an original signature from traveler is REQUIRED before the report can be forwarded to UF Travel for payment.

## 5. CONTACT INFO:

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