HOW TO ENTER A 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 A New SAR/TAR" button on your dashboard.



Step 2: Select Travel

<u>Remember</u>: Travel TAR'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.

Select a Type of Request

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.

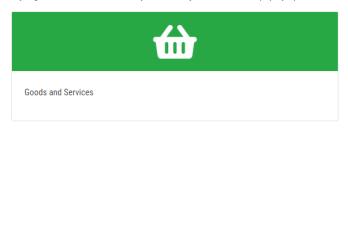


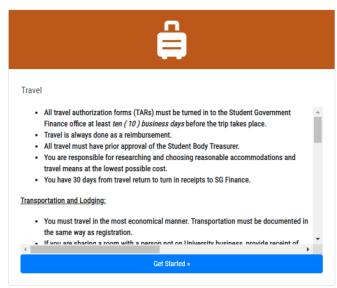
Step 3: Once you select a type of request, a drop down with information will emerge. Please read the information as it contains important tips and guidelines according to the type of request that you will be submitting. After reading the information go ahead and click "Get Started". Note: Always refer to current 808 codes for funding limits.

Select a Type of Request

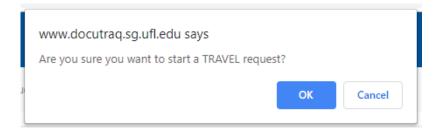
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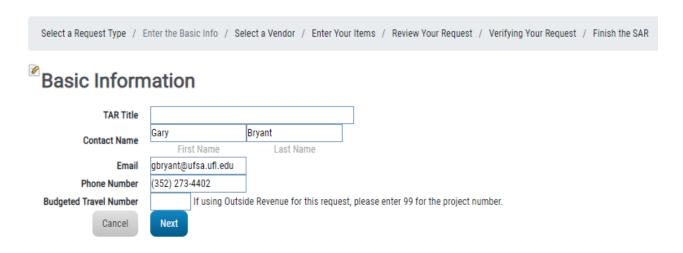


Step 4: After clicking "Get Started "you will then be asked to confirm that is in fact the type of request you would like to submit.



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.

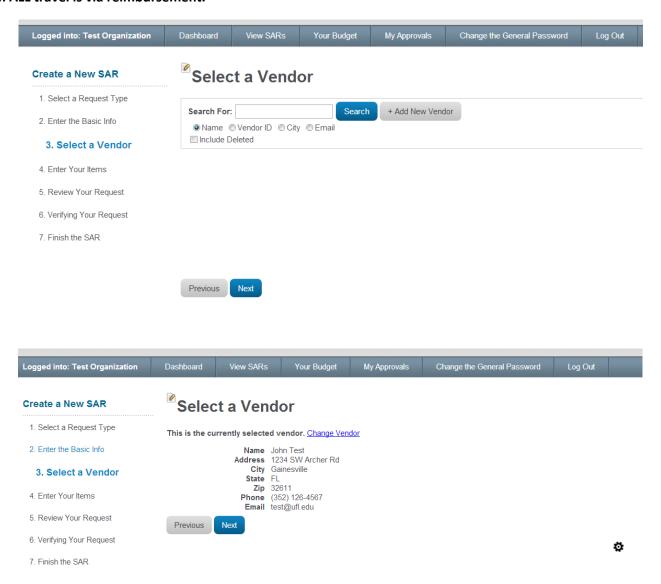
NOTE: The fifth line down on this page asks for the Budgeted Project number. Your budget lists projects/events in a numeric sequence. The Budgeted Project Number is found beside each project in the budget. This number is REQUIRED in order to match your request to your budget.



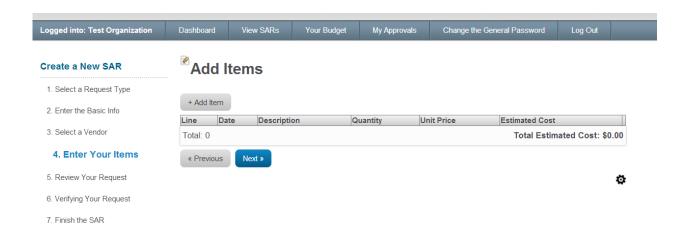
Step 6: Next you will see the vendor selections page in which you will select the vendor. The vendor is the person being reimbursed. Search first. If the vendor for your request is not in the system please select "Add New Vendor" and add them.

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 via reimbursement.

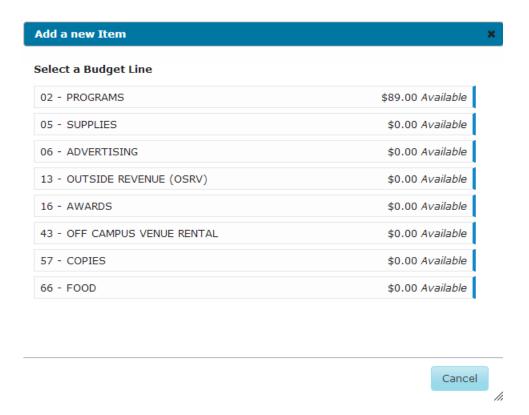


Step 7: Once you have selected a vendor you will be able to add the items you wish to purchase. To do so click "Add item "



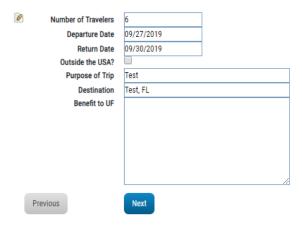
Step 8: A new feature of Docutraq is to display the available balance beside budgeted lines for your group. The request will charge whatever line you pick provided there is sufficient funds left in that line.

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.

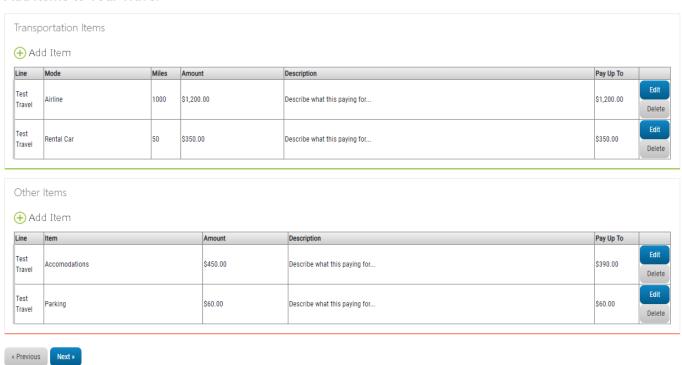
Travel Form for "TEST"



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.

Add Items to Your Travel



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
 Gary Bryant

 Email
 gbryant@ufsa.ufl.edu

 Phone Number
 (352) 273-4402

Budgeted Travel Number 1

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Vendor Information



 Name
 John Test

 1234 SW
 Archer Rd

 City
 Gainesville

 State
 FL

 Zip
 32611

 Phone
 (352) 126-4567

 Email
 test@ufl.edu

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Travel Form



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Line Items

Transportation Items

+ Add Item

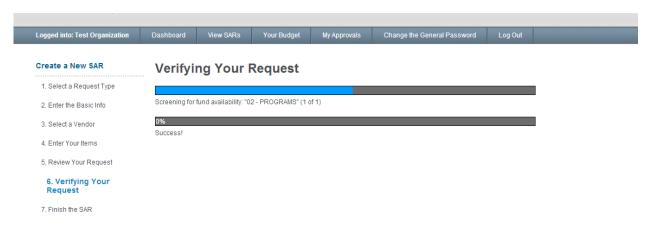
Line	Mode	Miles	Amount	Description	Pay Up To	
Test Travel	Airline	1000 \$1,200.00	01 200 00	Describe what this paying for	\$1,200.00	Edit
			51,200.00			Delete
Test Travel	Rental Car					Edit
		50 \$350.00	Describe what this paying for	\$350.00	Delete	

Other Items



Line	Item	Amount	Description	Pay Up To	
Test Travel	Accomodations	\$450.00	Describe what this paying for	\$390.00	Edit Delete
Test Travel	Parking	\$60.00	Describe what this paying for	\$60.00	Edit Delete

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.

All Finished!

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





IMPORTANT REQUEST INFORMATION

- THE FIRST AND MOST IMPORTANT RULE? <u>YOU CANNOT SPEND ACTIVITY AND SERVICES FEES</u> 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 <u>before</u> approval, SG Finance is NOT LIABLE for the payment to a vendor.
- THE SECOND MOST INMORTANT RULE? <u>ONLY EXPENSES MADE BY UF STUDENTS MAY BE</u>
 <u>REIMBURSED ON TRIPS.</u> (NO STAFF, ADVISOR, CHAPERONE COSTS, P-CARDS) SG will not reimburse departments.
- TARS <u>MUST BE</u> received by the SG Finance (approved by your Org President/Treasurer) 30 days prior to your departure but 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 via a 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 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
Finance Manager	Gary Bryant	Budgets ,800 Codes, Docutrag	gbryant@ufsa.ufl.edu
Sr. Fiscal Assistant	Kim Harrell	Docutraq, Deposits, Budgets, Travel	kharrell@ufsa.ufl.edu
Fiscal Assistant	Tabitha Hill	Docutraq, Budgets, Travel, Reimbursements	tahill@ufsa.ufl.edu