

HOW TO ENTER A SAR

THE WEBSITE IS : [DOCUTRAQ.SG.UFL.EDU](https://docutraq.sg.ufl.edu)

Step 1: To create a new SAR [Student Activity Request], click the green “ Create A New SAR/TAR” button on your dashboard.



+ Create A New SAR/TAR

Step 2: Select Goods and Services

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.



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 “.

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 “. Note: Always refer to current 808 codes for funding limits.

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

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.

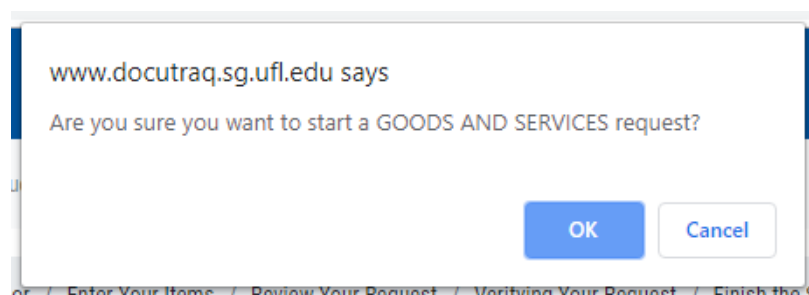
Food – maximum amount of \$2.00 per UF student eating the food for any given event/project.

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.



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.

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



Basic Information

SAR Title	<input type="text"/>	
Contact Name	<input type="text" value="Gary"/>	<input type="text" value="Bryant"/>
	First Name	Last Name
Email	<input type="text" value="gbryant@ufsa.ufl.edu"/>	
Phone Number	<input type="text" value="(352) 273-4402"/>	
Budgeted Project Number	<input type="text"/>	If using Outside Revenue for this request, please enter 99 for the project number.
	<input type="button" value="Cancel"/>	<input type="button" value="Next"/>

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 your 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

Create a New SAR

1. Select a Request Type

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Select a Vendor

Search For:	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="+ Add New Vendor"/>
<input checked="" type="radio"/> Name <input type="radio"/> Vendor ID <input type="radio"/> City <input type="radio"/> Email			
<input type="checkbox"/> Include Deleted			

Previous

Next

Create a New SAR

1. Select a Request Type
2. Enter the Basic Info
- 3. Select a Vendor**
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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**
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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.

Edit Item (Item ID: 80159) ✕

Quantity:

1

Price:

\$150.00

Estimated Cost:

\$150.00

Date of Event

9/30/2019

Description

Banner to advertise Org tabling taking place in Turlington Plaza from 1p-3p.

Line Number:

Test Advertising - ADVERTISING ▼

Cancel

Update Item

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.

+ Add Item

Line	Date	Description	Quantity	Unit Price	Estimated Cost	
Test Advertising - ADVERTISING	9/30/2019	Banner to advertise Org tabling taking place in Turlington Plaza from 1p-3p.	1	\$150.00	\$150.00	<div>Edit</div> <div>Remove</div>
Test Awards - AWARDS	9/30/2019	Trophy to be given out to winner of our donut activity.	1	\$40.00	\$40.00	<div>Edit</div> <div>Remove</div>
Test Food - FOOD	9/30/2019	Donuts and juice to be given out a tabling. We are expecting 60 in attendance.	1	\$150.00	\$150.00	<div>Edit</div> <div>Remove</div>
Total: 3					Total Estimated Cost: \$340.00	

« Previous
Next »

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.

Review Your Request

Basic Information

SAR Title

Test

Contact Name

Gary Bryant

Email

gbryant@ufsa.ufl.edu

Phone Number

(352) 273-4402

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	
Test Advertising - ADVERTISING	9/30/2019	Banner to advertise Org tabling taking place in Turlington Plaza from 1p-3p.	1	\$150.00	\$150.00	<div>Edit</div> <div>Remove</div>
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Total: 3					Total Estimated Cost: \$340.00	

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.

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Create a New SAR

Verifying Your Request

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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. If you get an error, go to "View Requests" and open up the new SAR. You will still be able to save to pdf.

Options

Print

Download as PDF

View SAR Details: 123-2000668 (06,16,66)

Basic Information

SAR Title

Test

Contact Name

Gary Bryant

Email

gbryant@ufsa.ufl.edu

Phone Number

(352) 273-4402

Budgeted Project Number

1

Vendor Information

Name

John Test

Address

1234 SW
Archer Rd

City

Gainesville

State

FL

Zip

32611

Phone

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Email

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Line Items

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Total: 3

Total Estimated Cost: \$340.00

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.
- SARs **MUST BE** received by the SG Finance (approved by your Org President/ Treasurer) asap or 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 (after the SAR is fully approved). All receipts for a given SAR must be turned in at the same time, and the individual being reimbursed must turn in their own receipts.

- Frequently Asked Questions - What are line items in an SAR?
- Programs: Anything that does not fall within any of the categories listed below.
- Advertising: Promoting the Org and/or an event.
 - Fliers/promo items/shirts.
 - Facebook Ads; twitter, etc.
 - Tarps/banners/tablecloth (custom).
 - 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.
 - Maximum amount is \$5.00 per person.
- Copies: All copies must be made through the SG Copy Center located on level 2, Room 2105 of the Reitz Union. Contact Info: copycenter@sg.ufl.edu.
- Awards :
 - No more than \$40 per award.
 - Given to individuals participating in some sort of competition.

2. Deposits:

- **ALL CHECKS MUST BE MADE OUT TO UNIVERSITY OF FLORIDA.**
- Deposits are taken from 8 to 11:30a and 1p to 4:30p during normal business days.
- All funds must be turned in to SG Finance within 15 calendar days from date on the check.

3. CANCELLATIONS 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.
- Once an Expense Report is completed, the traveler is REQUIRED to approve the amount via email before the report can be forwarded to UF Travel for payment.

5. CONTACT INFO:

Student Body Treasurer		Budgets, 800 codes	treasurer@sg.ufl.edu
Finance Manager	Gary Bryant	Budgets ,800 Codes, Docutraq	gbryant@ufsa.ufl.edu
Sr. Fiscal Assistant	Kim Harrell	Docutraq, Deposits, Budgets, Travel	kharell@ufsa.ufl.edu
Fiscal Assistant	Tabitha Hill	Docutraq, Budgets, Travel, Reimbursements	tahill@ufsa.ufl.edu