

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 |
|--------------------------------|-----------|-----------|-------------|--------------|-----------------------------|---------|

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 “.

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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.

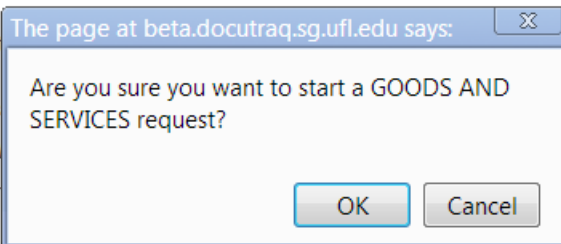
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Step 5: Information page in which you will input the contact info for the SAR. Please remember whoever is listed as the contact person of the SAR will receive notifications during the processing of the SAR. This is the person our office will contact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

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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.

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Create a New SAR

- Select a Request Type
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Select a Vendor

Search For:

Name Vendor ID City Email

Include Deleted

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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

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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.

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.

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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

« Previous ⚙

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.

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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

⚙

« Previous

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

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- 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

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- 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

Download as PDF

SAR Overview **123-106372**

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

President: Jeffrey Schmidt
jschmidt@sq.ufl.edu
 41871380

Treasurer: Jeffrey Schmidt
jschmidt@sq.ufl.edu
 3522730310
 1234-5678

Vendor: John Test
 1234 SW Archer Rd
 3522730310
 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 |

5. CONTACT INFO:

| | | | |
|------------------------|----------------------|--|--|
| Student Body Treasurer | | Budgets, 800 codes | treasurer@sg.ufl.edu |
| &] v Manager | ' Ć Ç Ć Ç v S | Budgets ,800 Codes, Docutraq | PO@sg.ufl.edu |
| Sr. Fiscal Assistant | <] u , Ć Ć o o | Docutraq, Deposits, Budgets, Travel | 176@mu.ufl.edu |
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