Approving an Invoice for an Encumbered Payment
(Allocating Additional Funds Example)

This guide is designed for approvers in myUF Payment Solutions. To complete the process described below, you must have the UF_SY_BUSUNIT_UFLOR role and either the UF_AP_Reviewer or UF_AP_Approver security role in myUFL. For a complete coverage of content and skills related to myUF Payment Solutions, please see the following online course: PST970 myUF Payments for Approvers.

To access myUF Payment Solutions, use the following steps:

- Visit http://my.ufl.edu
- Click the Access myUFL button
- Enter your GatorLink username and password
- Click the Login button
- Click Main Menu > My Self Service > myUF Payment Solutions

In this guide, you will encounter an invoice for an encumbered payment. You will allocate additional funds to an unmatched portion of the invoice (in this case for shipping charges). You will then approve the invoice.

1. Click the Work Invoice icon.

2. Notice that the amount to be paid for this invoice is $654.32. Only $640 is currently allocated. Why is there a remaining $14.32? Let’s investigate by reviewing the Line Items tab and the imaged invoice.

   ![Amount: 654.32 Allocated: 640.00 Remaining: 14.32]

3. Click the Line Items tab.

4. Here we find that the invoice matches line #1 of the purchase order. Therefore, $640 of the amount has been appropriately allocated.

   ![Matched Items Table]

5. Let’s check the imaged invoice to find out more about the extra charge of $14.32. Scroll to the bottom of the invoice.

   If you notice the invoiced image is difficult to read you can make the imaged invoice bigger.

   ![Imaged Invoice Image]
Use the following options to improve the readability of the imaged invoice:

- The New Window button opens the imaged invoice in full-screen mode (if you need to take a closer look).

- Another option is to use the Zoom buttons to adjust your view of the imaged invoice.

6. Because this $14.32 was not included in the original purchase order, you'll need to allocate it now.

7. Click the Allocations tab.

8. Click the Business Unit dropdown menu and click the UFLOR list item.

9. Input ChartField information.

10. Scroll to the beginning of the line and click the Save icon.

11. The full amount is now listed as Allocated.

12. Click the large Save button.

   **NOTE:** If this were an invoice charged to a Foundation Funding Source (Fund 171 and Source FXXXXXXX), you have two options:
   - You would need to route the invoice manually to the Fund Administrator for approval or
   - Departments approve the invoice and upload a signed UFF PA form.

13. Provided that all ChartField information is correct, the Approve button (green checkmark) will become active. If there are issues with the invoice, hovering your mouse over this icon will reveal the updates to make prior to approval. Click the Approve button.

If you need help with...

- Technical issues, contact the UF Help Desk:
  - 392-HELP(4357)
  - helpdesk@ufl.edu

- Procedures, Policies and Directives, contact University Disbursements:
  - 392-1241
  - Disbursements@ufl.edu

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Office of Human Resource Services
University of Florida, Gainesville, FL 32611

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