Approving an Invoice for an Asset

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**

For assets (items costing over $5000 and nonconsumable), document their receipt by checking the Asset Purchase checkbox in the header of the invoice and completing the following fields:

• Received Date
• Location
• Manufacturer
• Responsible Individual
• Serial Number

Before you do this, confirm that the asset has arrived by routing the invoice to your reviewer.

1. Ask the reviewer to attach documents that confirm that the asset has arrived. Document(s) provided will need to include the legible name of the person who received the asset and date. A signed and dated packing slip, signed and dated invoice or an email stating the item has arrived can be used to confirm receipt.

2. Click the **Work** icon to interact with the invoice.
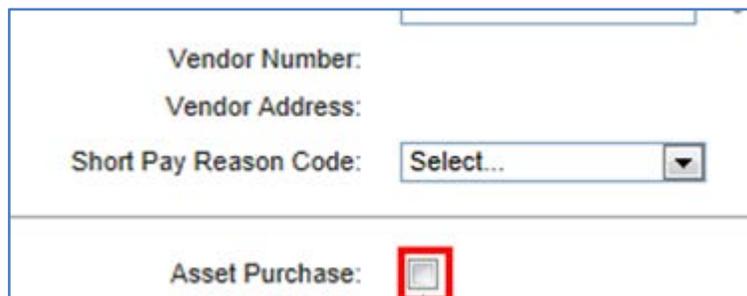
3. Click the **Asset Purchase** checkbox.

4. This displays additional fields for you to complete. Scroll down the page to view the fields pictured below.

5. Click the calendar icon to input the **Received Date**.

6. Enter the desired information into the **Location** field (e.g. "**BLDG 723 Room 118**).

7. Enter the desired information into the **Manufacturer** field (e.g. "**Electron Microscopy Sciences**").

8. Enter the Model information (e.g. "**EMS 150T**").

9. Who is responsible for the asset? Enter the person's full name (e.g. "**Mike Smith**").

10. Enter the **Serial Number**.

11. Click the **Save** button to save this information.

12. Complete the rest of the invoice. Provided that all information you have entered is correct/permissible, the **Approve** button (green checkmark) will become active.

13. Click the **Approve** button to submit the invoice. Once in workflow, the invoice will route to Asset Management for **Secondary Approval**.

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