Previewing and Routing an Invoice from the Inbox

This guide is designed for reviews and 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 appropriate online course for your role in the system: PST967 myUF Payments for Reviewers or 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**

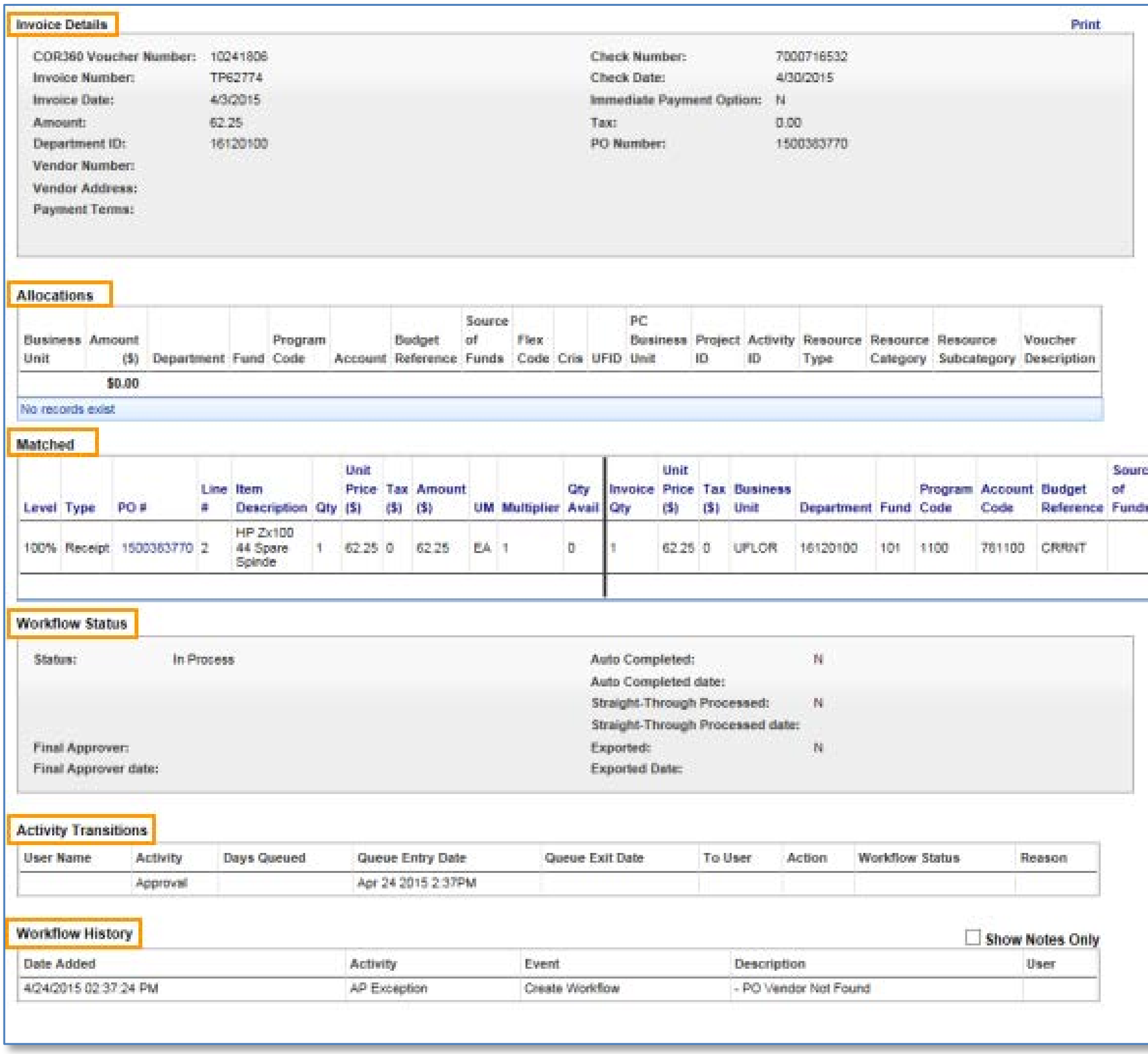
While in the Inbox, you may preview invoice details and route the invoice to another user in the system.

1. Click the **Invoice Details** button next to a particular invoice. The page that displays contains several helpful sections for a quick reference:

   ✓Invoice Details
   ✓Allocations
   ✓Matched
   ✓Workflow Status
   ✓Activity Transitions
   ✓Workflow History and Comments

2. When you look at the **Invoice Image**, you can:

   - Check the **Invoice Details** section for Total Amount, Vendor, PO Number, and Department ID.
   - Check the **Allocations** section for ChartFields entered in a Check Request or added to the invoice.
   - Check the **Matched** section for the matched purchase order information such as PO number, Quantity, Unit Price, Amount, etc.
   - Check the **Workflow Status** to see if this item was approved and Exported to myUFL for payment. Exporting is an overnight process.
   - Check the **Activity Transitions** to find out where the invoice is in the system. For example, you can view the User Name, the Queue Entry Date (the date it entered the myUF Payments system) and Workflow Status.
   - Check the **Workflow History and Comments** to view the history of the invoice in the system.



Invoice Details Print

COR360 Voucher Number:	10241806	Check Number:	7000716532
Invoice Number:	TP62774	Check Date:	4/30/2015
Invoice Date:	4/3/2015	Immediate Payment Option:	N
Amount:	62.25	Tax:	0.00
Department ID:	16120100	PO Number:	1500383770
Vendor Number:			
Vendor Address:			
Payment Terms:			

Allocations

Business Unit	Amount ($)	Department	Fund	Program Code	Account	Budget Reference	Source of Funds	Flex Code	Cris	UFID	PC Business Unit	Project ID	Activity ID	Resource Type	Resource Category	Resource Subcategory	Voucher Description
	$0.00																

No records exist

Matched

Level	Type	PO #	Line #	Item Description	Qty	Unit Price ($)	Tax ($)	Amount ($)	UM	Multiplier	Qty Avail	Invoice Qty	Unit Price ($)	Tax ($)	Business Unit	Department	Fund	Program Code	Account Code	Budget Reference	Source of Funds
100%	Receipt	1500383770	2	HP Zx100 44 Spare Spinde	1	62.25	0	62.25	EA	1	0	1	62.25	0	UFLOR	16120100	101	1100	781100	CRRNT	

Workflow Status

Status:	In Process	Auto Completed:	N
		Auto Completed date:	
		Straight-Through Processed:	N
		Straight-Through Processed date:	
Final Approver:		Exported:	N
Final Approver date:		Exported Date:	

Activity Transitions

User Name	Activity	Days Queued	Queue Entry Date	Queue Exit Date	To User	Action	Workflow Status	Reason
	Approval		Apr 24 2015 2:37PM					

Workflow History Show Notes Only

Date Added	Activity	Event	Description	User
4/24/2015 02:37:24 PM	AP Exception	Create Workflow	- PO Vendor Not Found	

3. To route the invoice, click the **Route** button. 

4. Click the dropdown menu to select the **Route Type**.

5. Click the **Copy to User in Company** list item.

6. Click the **Route Item To** dropdown menu for a list of users in myUF Payments.

7. Select a name from the list.

8. Enter a note in the **Comments** field.

9. Click the **OK** button.
   - Because you have routed the invoice to another user, the invoice no longer appears in your Inbox.

If you need help with…

If you need help with technical issues, contact the UF Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For further assistance, please contact University Disbursements at 392-1241 or email Disbursements@ufl.edu.