Using Search to Research an Invoice in the System

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

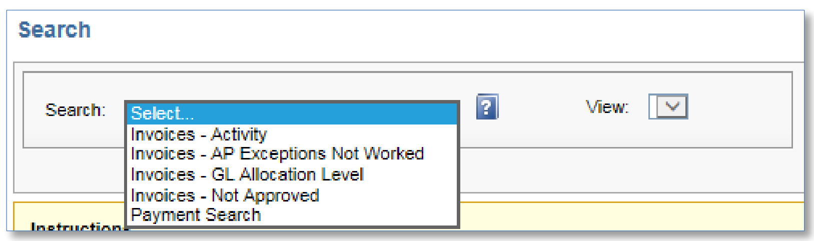
Use the Search page to check the status of a submitted invoice and find invoices in the system for your department. Use the filters to enter search parameters and be able to find what you need.

1. At the main menu, click **Search**.

2. At the **Search** page, click the dropdown to view your options.

3. There are six standard views available:

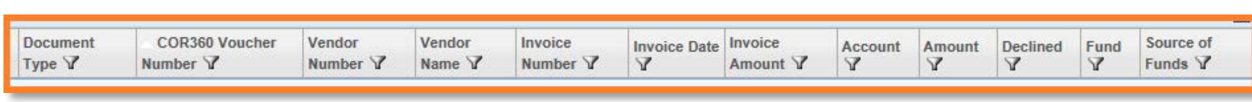
   • Invoices – Activity
   • Invoices – AP Exceptions Not Worked
   • Invoices – GL Allocation Level
   • Invoices – Not Approved
   • Payment Search
   • Unassigned Queue



   Each view comes with different column headings and filters.

4. The **Invoices - GL Allocation Level** selection. 1477831547

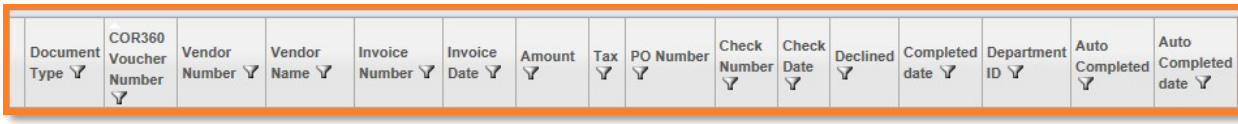
5. You may search by any of the column headings that display.



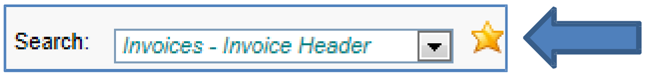
6. Click the dropdown to select the other view, **Invoices - Invoice Header**.

7. Click the **Invoices - Invoice Header** list item.

8. This view has various column headings to use as filters to locate invoices in the system. Notice that this view includes many of the most common search parameters (such as COR360 Voucher Number, Vendor Number, Vendor Name, and Department ID).

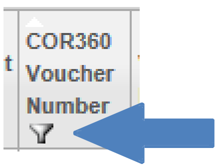


9. Click the **star** to save this view as the default.



10. Click **OK**.

11. For this example, search for an invoice by COR360 Voucher Number. Click the **filter icon**.



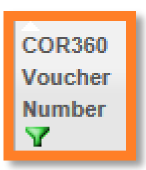
12. Click the **dropdown** to view your options.

13. Since we have a specific COR360 Voucher Number we need, click the **Equals** list item.

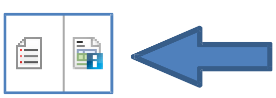
14. Enter the voucher number you need, such as "**10000092**".

15. Click the **OK** button to activate the search.

16. The filter icon turns green when the results of the search display.



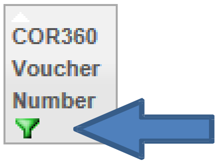
17. To check the status of the invoice, click the **Invoice Details** icon. Scroll to the bottom of the page.



18. Under **Workflow History and Comments**, you may view the following:
    - Date
    - Activity (Workflow State)
    - Event Text
    - Comments (Out of Office notes)
    - User (included in workflow)

19. Click the **Close** button.

20. To clear the filter and begin a new search, click the **filter icon**.



21. Click the **Cancel Filter** button.

22. Now there are no green icons on the Search page.

Document Type	COR360 Voucher Number	Vendor Number	Vendor Name	Invoice Number	Invoice Date	Amount	Tax	PO Number	Check Number	Check Date	Declined	Completed date	Department ID	Auto Completed	Auto Completed date

23. To try a different search, such as all invoices for the month of September, click the **Invoice Date filter icon**.

24. Click the **filter dropdown** to view your options.

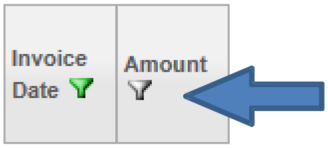
25. Click the **Is Between** list item.

26. Invoices for the month of September now displayed for your department.

27. Click the **Invoice Date** column heading to sort the information. This sorts the dates newest to oldest. Click the **Invoice Date** column heading again to re-sort the dates from oldest to newest.

Document Type	COR360 Voucher Number	Vendor Number	Vendor Name	Invoice Number	Invoice Date
Check Request	10000000			10000000	9/3/2013
Invoice	10000003	0000185057	BB&T Equipment Finance Corporation	0095709	9/3/2013
Invoice	10000011				9/3/2013
Invoice	10000027	0000000743	San Felasco Nurseries Inc dba Grandiflora	SI-683621	9/3/2013
Check Request	10000043			10000043	9/5/2013
Check Request	10000044			10000044	9/9/2013
Check Request	10000045	0000178779	Emily Weber LeBrun	10000045	9/9/2013
Check Request	10000046	0000001942	University of Florida Foundation Inc	10000046	9/9/2013

28. Now let's add a new filter to the **Invoice Date** filter that already exists. Click the **Amount** filter icon.

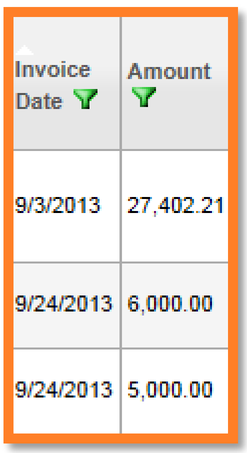


29. Click the **filter dropdown** menu.

30. Click the **Is Greater Than or Equals** list item.

31. In this example, enter a valid value e.g. "**5000**".

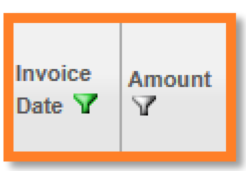
32. Click the **OK** button.



33. Notice that the data is now sorted by both invoice date and amount.

34. Now let's clear one of the filters. Click the **Amount** filter icon.

35. Click the **Cancel Filter** button. The **Invoice Date** filter remains, and the **Amount** filter is now cleared. Scroll to the bottom of the page and scroll right.



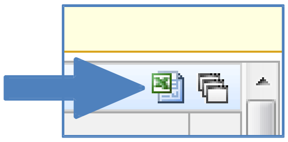
36. Click the **Show Total Record Count** checkbox.

37. Scroll left. The system now displays the total number of rows.

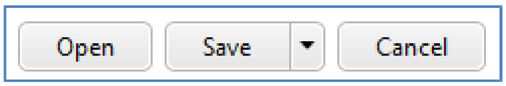
38. Click the **records per page** dropdown to increase the number of rows displayed.

39. Click the **100** list item and use the scrollbar to view all records.

40. To export to Excel, click the **Excel icon**. (You may need to scroll to the right to see this icon.)



41. Click the **Open** button in the message at the bottom.



You may save and modify the Excel spreadsheet if needed.

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