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.

![Search: Invoices - Invoice Header](image)

10. Click **OK**.

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

![Filter Icon](image)

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

![Dropdown](image)

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.

![COR360 Voucher Number](image)

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

![Invoice Details Icon](image)

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.

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

![Invoice Date and Amount filters]

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.

![Filtered data with Invoice Date and Amount]

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.

![Records per page dropdown](image)

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.)

![Excel icon](image)

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

![Open button](image)

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