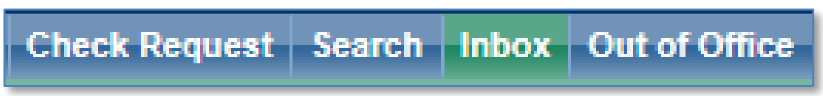
Using the Inbox

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**



In this guide, you will tour the Inbox, which contains all of your incoming and saved invoices.

1. The Inbox has four folders:

   - New Documents
   - Pended
   - CC'd
   - Unassigned

   The unassigned queue is where invoices go first. Invoices copied to you will display in the **CC'd** folder but will not need action. These invoices are there for your reference only.

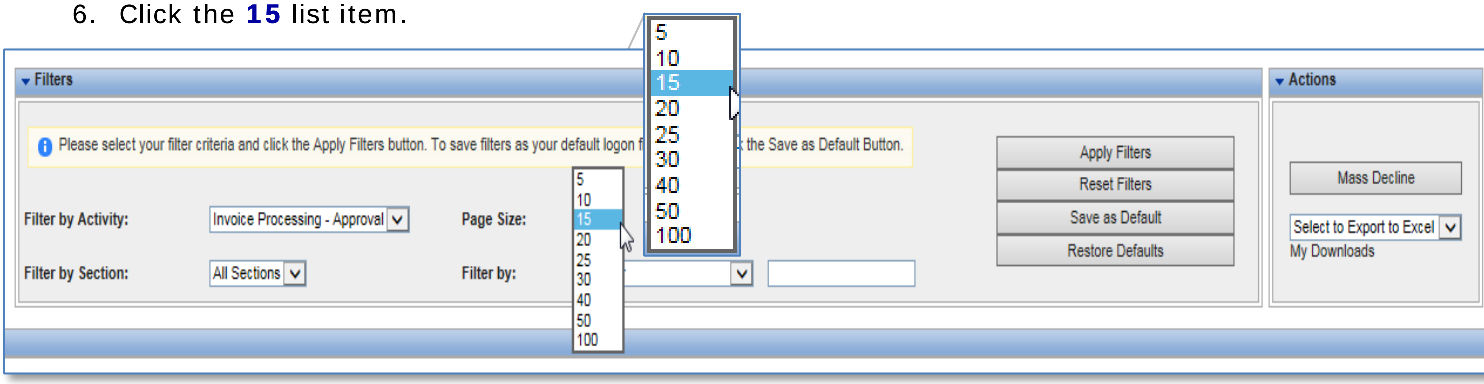
2. Invoices will first appear in the **Unassigned queue** when you are part of a group of approvers. Any member of your group may work with the invoice and approve it.

3. When an invoice has been routed to you directly for your action, it shows up in your **New Documents**.

4. The **Pended** folder will store any invoices you have opened and not completed.

5. By default, only 5 invoices requiring your approval will appear in all sections. Click the **Page Size** dropdown menu to increase the number.

6. Click the **15** list item.

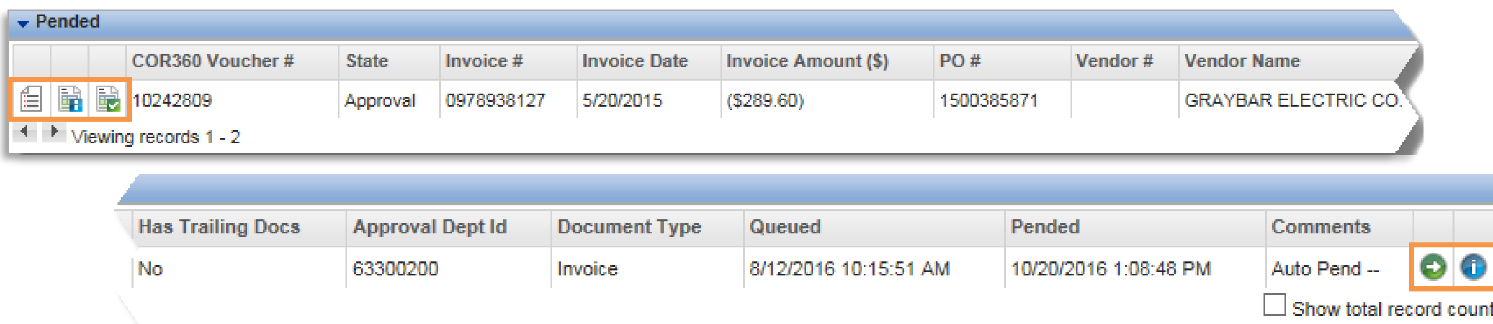


7. Click the **Apply Filters** button.

8. Scroll to the bottom of the page to see the expanded view.

9. Invoice rows may include buttons with the following functions:

- View the invoice details
- Open an invoice to begin work
- Route an invoice
- Copy it to another person



10. Click the **Invoice Details** button to view invoice information including workflow status. The **Invoice Details** page is printable and contains at-a-glance information on the invoice.

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