

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 <u>http://my.ufl.edu</u>
- Click the Access myUFL button
- Enter your GatorLink username and password
- Click the Login button
- Click Main Menu > My Self Service > myUF Payment Solutions

Check Request Search Inbox Out of Office

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.



Instruction Guide

6. Click the 15 list item.	/5
← Filters	20 ↓ Actions
Please select your filter criteria and click the Apply Filters button. To save filters as your default logon Filter by Activity: Invoice Processing - Approval Page Size: S 10 15 20 25 30 40 50 100	n f 25 the Save as Default Button. 40 50 100 Save as Default Button. 30 Apply Filters Save as Default Save as Default Restore Defaults Mass Decline Select to Export to Excel ▼ My Downloads

- 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

✓ Pended										
	COR360 Voucher #	State	Invoice #	Invoice Date	Invoice Amount (\$)	PO #	Vendor #	Vendor Name		
e 🖬 🖻	10242809	Approval	0978938127	5/20/2015	(\$289.60)	1500385871		GRAYBAR ELECTRIC CO.		
Viewing records 1 - 2										
Ş	Has Trailing Docs Approval Dept Id			Document Type	Queued	Pend	ed	Comments		

1	Has Trailing Docs	Approval Dept Id	Document Type	Queued	Pended	Comments		
/	No	63300200	Invoice	8/12/2016 10:15:51 AM	10/20/2016 1:08:48 PM	Auto Pend	•	
1							ord cou	۱t

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:
 - o 392-HELP(4357)
 - o <u>helpdesk@ufl.edu</u>
- Procedures, Policies and Directives, contact University Disbursements:
 - o 392-1241
 - o <u>Disbursements@ufl.edu</u>