

Viewing and Annotating an Imaged Invoice

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**

As a reviewer or approver, you may open an invoice in myUF Payment Solutions and electronically mark it for various purposes:

- Confirm that goods/services have been received
- Add a note for further processing or future reference
- Show that you have seen it

You may electronically add features such as the following:

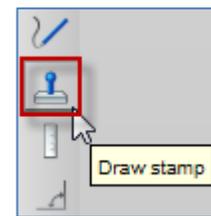
- Text
- A sticky note
- An electronic stamp such as "Received"
- Redactions

These electronic annotations will display when anyone opens or prints this invoice from within myUF Payment Solutions. These annotations will not display when the invoice is emailed to someone. Additionally annotations and redactions will not be transferred to myUFL.

1. From a folder in the Inbox, click the **Work Invoice** button.
2. On the top toolbar in the invoice, click the **New Window** button to open the invoice in full view.



3. Scroll down and view the total amount at the bottom of the invoice.
4. Click the **Draw Stamp** icon to add a stamp to the invoice.



5. Click **Received** to be able to draw a stamp on the invoice saying "Received."

Notice the other options available:

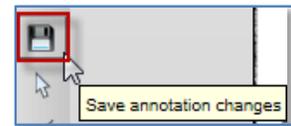
- Today's Date
- Paid
- Approved
- Rejected
- Void



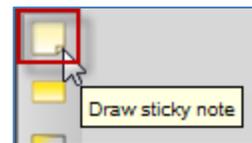
6. Click and drag anywhere **on the screen** to draw the stamp. The system will auto populate the word "Received". You may right-click on the word to see the tools in the mini-toolbar to adjust the font, etc.



7. Click the **Save** icon on the left-hand toolbar to save the stamp.



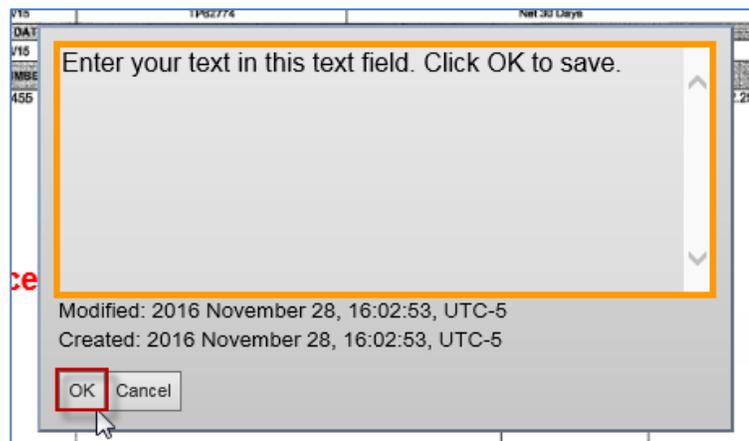
8. Click the **Sticky Note** icon to add a sticky note.
(Note: This will not show when printing the invoice.)



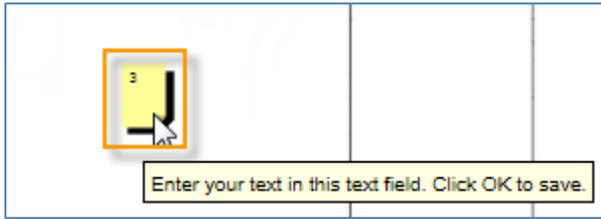
9. Click anywhere on the screen to start drawing the sticky note.

10. Enter your note in the text field.

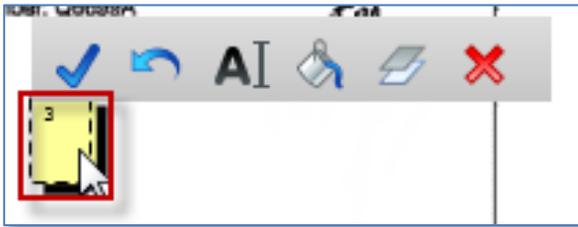
11. Click the **OK** button.



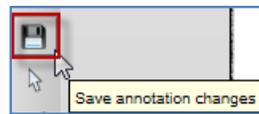
12. To read the note, **hover** over it.



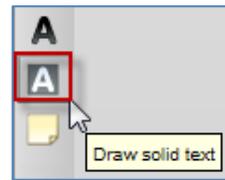
13. **Right-click** the note to view its mini-toolbar.



14. Click the **Save** icon.

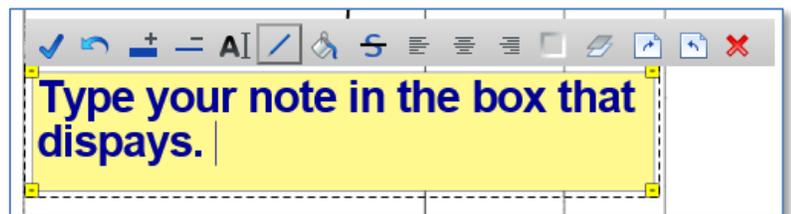


15. Click the **Text** icon to write on the invoice.

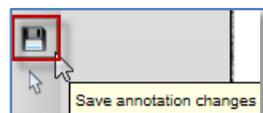


16. Click anywhere on the screen to draw a textbox.

17. Type your note in the box that displays.

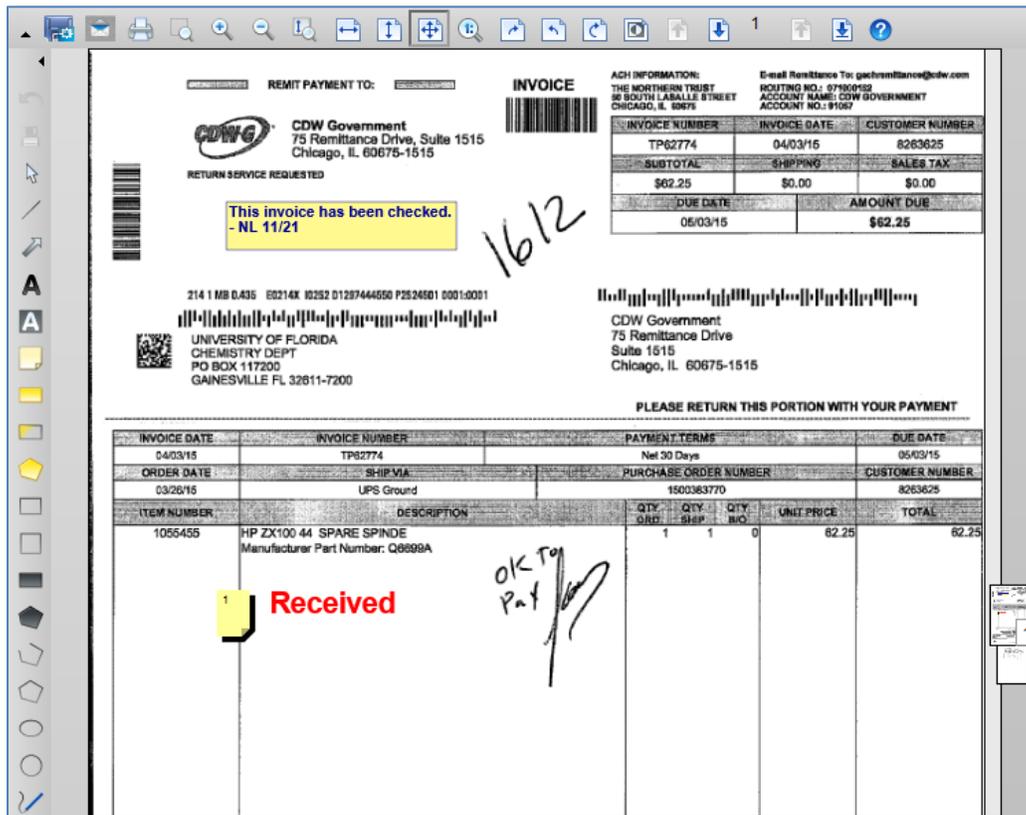


18. Click the **Save** icon.



19. Close the window.

20. Now the annotations you have added display for the next person that opens this invoice (within myUF Payment Solutions).



21. Click the **Save** icon to save your annotations permanently on the invoice.



If you need help with...

- Technical issues, contact the UF Help Desk:
 - 392-HELP(4357)
 - helpdesk@ufl.edu
- Policies and Directives, contact the UF Budget Office:
 - 392-1241
 - Disbursements@ufl.edu.