

## Completing a Requisition in myUF Market

### Overview

This instruction guide is for Requestors who have the role UF\_N\_MKT\_REQUESTOR. Shoppers may complete a requisition with this information but must assign it to a requestor to place the order. Use this instruction guide to complete a requisition in myUF Market, either after filling the cart yourself or having it assigned to you by a Shopper. Click the **Proceed to Checkout** button on the top right corner of the cart to complete required information such as Shipping, Due Date, Billing, PO Business Unit and ChartFields.

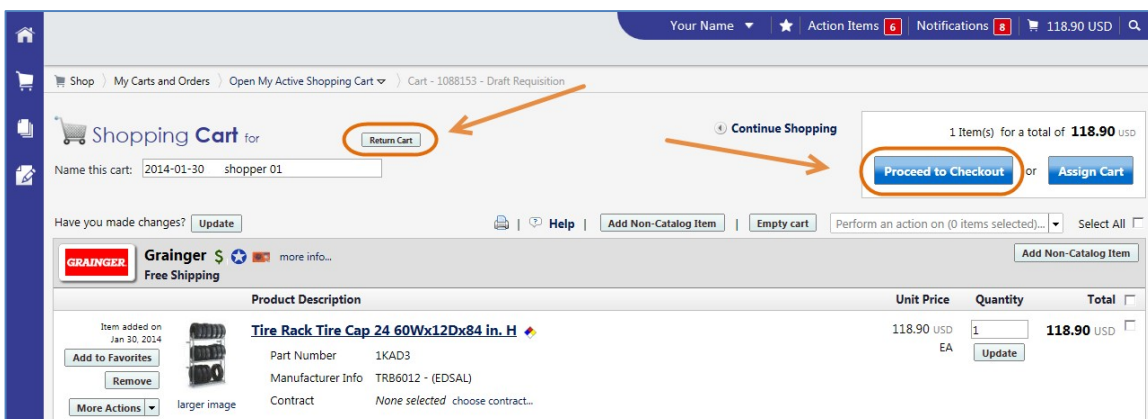
Additional information such as selecting PCard as a payment option (if available) and Distribute By options may be selected as well. If processing a form or non-catalog item, a Commodity Code will be needed. Internal Notes and External Notes may also be completed as well as attachments. When completed, the requestor may place the order using the **Place Order** button at the top. This button remains grayed out until the requisition is complete and ready for ordering.

### Access myUF Market by:

1. Navigating to <http://my.ufl.edu/> and logging in with your Gatorlink username and password.
  - a. Click **Nav bar > Main Menu > Financials > eProcurement > myUF Market** for the UF\_N\_MKT\_Requestor role.
  - b. Click **Nav bar > Main Menu > My Self Service > myUF Market** for UF\_N\_MKT\_Shopper role.
  - c. Click **Nav bar > Main Menu > Financials > eProcurement > myUF Market** for

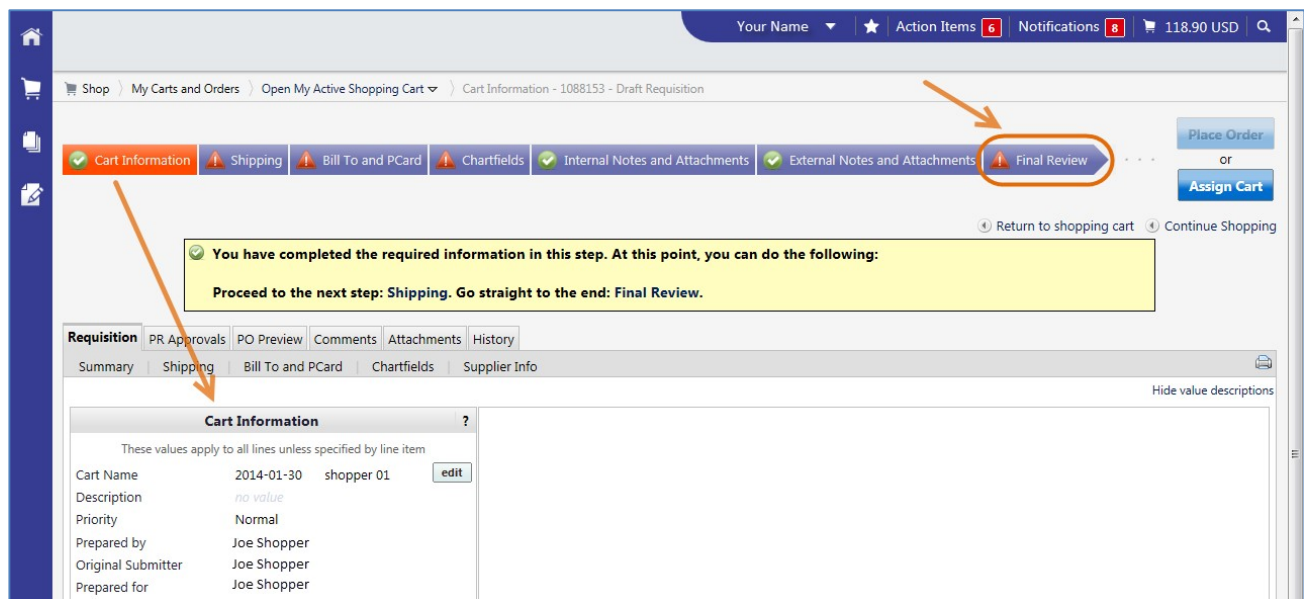
### UF\_N\_MKT\_Shopper\_Req role (to shop only). To view your current carts:

1. Click the **Cart Icon** or dollar amount in **USD** on the top-right to view your current cart.
2. Click the **View My Cart** button in the fly out box.
3. To view all your draft carts from here, use the breadcrumbs on the top left of the page, click the **Open My Active Shopping Cart** link, and then click the **View Draft Shopping Carts** link.
4. Click on a **Shopping Cart Name** to view the cart and begin to process as a requisition.
  - a. Make sure the cart contains a Cart Name that will be easy to use for finding the requisition in the future. Enter/edit the name in the **Name this cart** text box.
  - b. Return the cart to the Shopper if needed, with an explanation, by clicking the **ReturnCart** button above the name of the cart.



### To process as a requisition:

1. To process a cart as a requisition, click the **Proceed to Checkout** button at the top.
2. The system will display the requisition for each step in the **Guided Checkout** at the top--the orange, highlighted step is what is currently on the screen ready for editing.
3. Some steps may be completed with default values from the User Profile. Please use the instruction guide, "Setting up Your User Profile."
4. A green checkmark means complete; a red triangle means needs attention. Keep in mind that defaulted information may still require review even though the step indicates it is complete.
5. Click the **Final Review** step at the end to view the entire requisition at once.
6. Not all steps will be required for all requisitions.

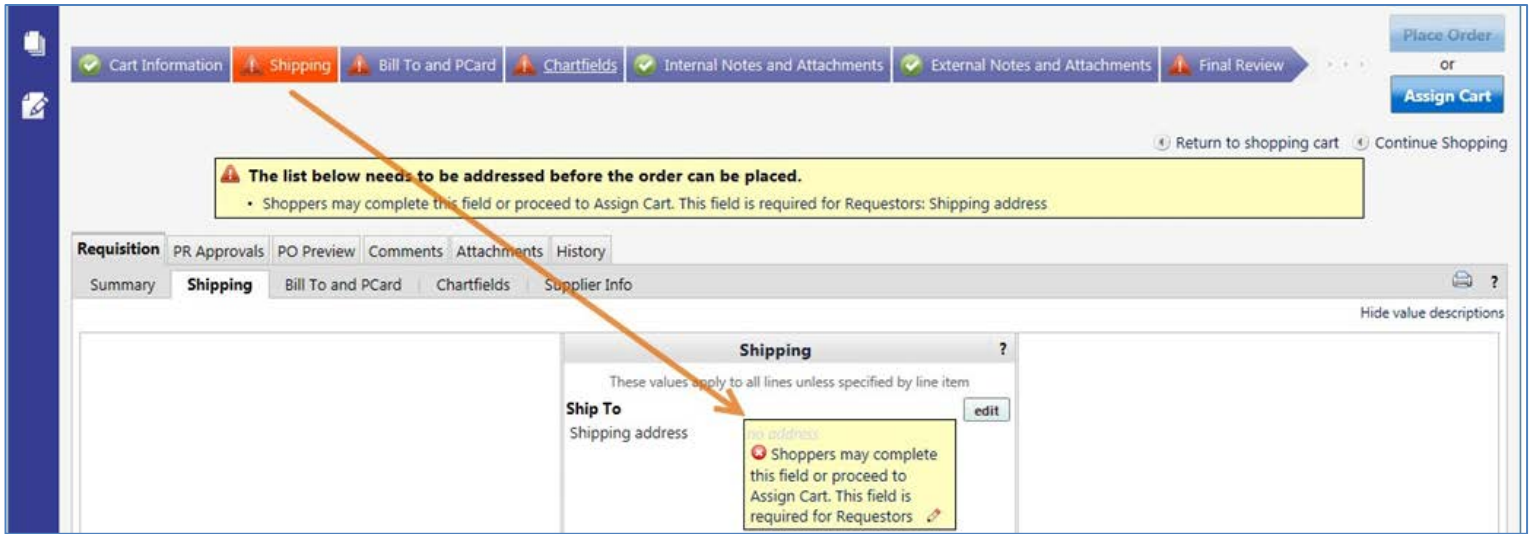


### Ship To:

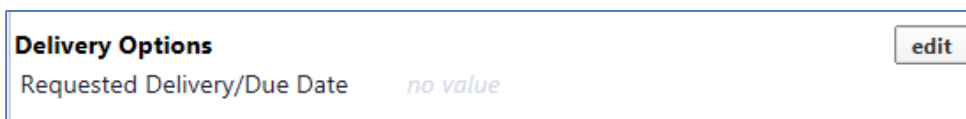
1. Click on the Shipping tab to view the section, or click the Ship To in the guide at the top, then click the **Edit** button to edit.

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2. Edit the existing address or select a new one for the requisition by clicking the **edit** button and following one of the three options below.
  - I. To modify the existing address:
    - a. Add the **Attn:** name and the **Building/Room** number.
    - b. Click the **Save this address for future use** checkbox if you would like to save this in your profile for future selection and use.
    - c. Click the **Save Changes** button to use.
  - II. Select from the **Or choose from your addresses** list by clicking the **Use** button--these are from your User Profile.
  - III. Search campus-wide for the address you need in the **Or select a new address** window.
    - a. Search by building name or part of the street address in the **Nick Name/Address Text** box. Street addresses must be official UF Facilities locations. For example, for Elmore Hall, enter "Elmore" or "971" as part of the street address 971 Elmore Drive.
    - b. Click the **Search** button.
    - c. Click the **Use** button to the left of the needed address to add to requisition.
    - d. If you do not find the street address needed, please call the Procurement Help Desk at 392 352-1335.
  
3. Under the Ship To address, edit the **Requested Delivery/Due Date** by clicking on the Edit button to the right. A Due Date is the date a good is needed by or the date a service will end, such as a lease. If left blank, today is assumed to be the due date.



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The **Due Date** is important because regular processes in myUFL won't close a purchase order if the due date is still in the future. This is especially useful if you need the PO to remain open for multiple invoices. Set it to the end of the fiscal year.

- When the changes are complete, the screen will display a green checkmark next to Shipping. Click the next step to proceed or click **Review** at the end to edit the entire requisition.

### Bill To and PCard:

To complete the **Bill To** information:

- Click the **Edit** button next to the Bill To line, inside the Bill To and PCard window.
- Follow the same instructions for selecting a shipping address keeping in mind

Billing addresses are not tied to PO Business Units.

### PCard Information:

- Click the **Edit** button to assign or unassign a PCard as payment method for the requisition as appropriate for the PCard policy and the cardholders individual limit.
- If a user needs a PCard activated in the system, they need to sign-in at least once, then complete the myUF Market PCard Access Form at <https://www.fa.ufl.edu/apps/purchasing/market/> to have it added to the system.
- Use the instruction guide, "Using PCards in myUF Market" at <http://purchasing.ufl.edu/departments/myufmarket/resources.asp>
  - If the vendor does not accept PCard, the option to assign a PCard will not be available.

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### Other Information – Distribute By:

1. Use this option if you need to pay the PO over time over several invoices, such as with a Standard Service Requisition.
2. Click the **Edit** button.
3. Select from the **Distribute By** dropdown to distribute by **Amount** or by **Quantity**.

### ChartFields:

#### PO Business Unit:

1. Click the **Edit** button to enter a PO Business Unit.
2. This will be the first four digits of your Dept ID.
3. You will be able to find the PO in myUFL by searching for it with this PO BusinessUnit.

#### ChartFields:

1. Click the Edit button to enter or modify any of the ChartFields needed for this requisition.
2. If paying with a Project ID, enter the Activity ID as 1 and the PC Business Unit as GRANT, otherwise, leave these fields blank.
3. ChartFields are the same as in myUFL; scroll to the right to view them all.
4. For creating split distributions, see the instruction guide, "Processing a Split Distribution in myUF Market".
5. Enter Dept ID, Fund Code, Program Code and Account Code, or click the **Select From All Values** link to search for each of these.
6. If they are part of the Shopper or Requestor or Approver's **User Profile** and they are marked as Default they will auto populate the field, otherwise, click the dropdown, **Select From Profile Values**, for each of these to select and add to the requisition.
7. Enter any additional ChartFields needed such as Source of Funds or Flex.

### Internal Notes and Attachments:

1. Click the **Edit** button to add an internal note which will go to your department financial approver and to the Purchasing Services Department if the requisition is routed that way. Click the **Save** button.
2. Click the **add attachments** link to upload an attachment. Browse for your attachment and click the **Save** button.

### External Notes and Attachments:

1. Click the Edit button to add an external note which will go to the vendor. Enter your notes and click the Save button.
2. Click the add attachments link to upload an attachment for the vendor. Browse for your attachment and click the Save button.
3. To see if an enabled vendor reads External Notes or attachments review the myUF Market Enabled Vendor Reference Tool on this page.  
<http://purchasing.ufl.edu/departments/myufmarket/vendors.asp>

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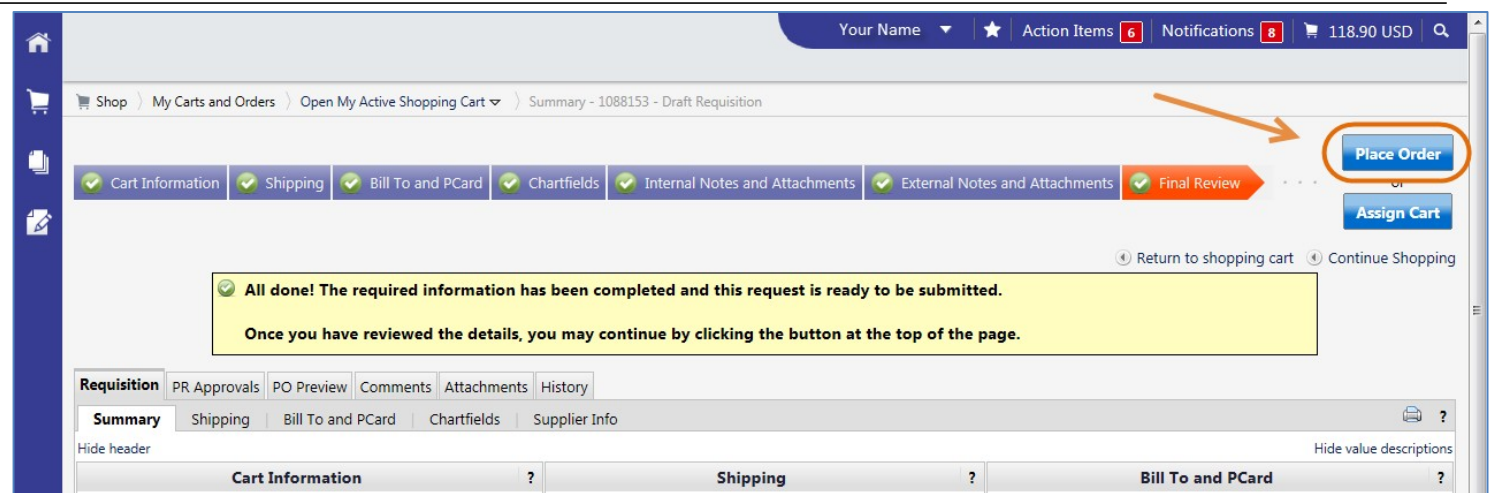
### Final Review:

#### Commodity Code:

1. To find the Commodity Code, scroll to the bottom of the requisition while in the **Final Review** screen.
2. The Commodity Code will be provided automatically by hosted vendors and punchout vendors. For Forms and Non-Catalog Item forms, click the **Edit** button at the line level to search for the correct Commodity Code on the form by clicking the **search icon** next to the Commodity Code text box.
3. Some forms include Commodity Code instructions in the instructions--please read!
4. Use the instruction guide, "Searching for Commodity Codes," to help with selection.

#### Placing the Order:

1. To place the order, all the steps in the blue arrow should have green checks for the Place Order button to become active.
2. Click the **Place Order** button to place the order.



For additional help, e-mail [procurement@ufl.edu](mailto:procurement@ufl.edu) or call the Procurement Services Help Desk at 392-1335.