Training & Organizational Development

Human Resources
UNIVERSITY of FLORIDA

Approving Requisitions in myUF Marketplace

## **Overview**

Use this instruction guide to approve a purchasing requisition (PR) in myUF Markeplace. Approvers in myUF Markeplace can approve, modify, add notes, return or deny (reject) a purchasing requisition. Please refer to the instruction guide, "Working with Returned Requisitions." This instruction guide is for those who have Financial Approver security in myUF Markeplace and the role,

**UF\_N\_MKT\_Financial\_Approver**. An approver must assign the requisition from the shared folder to their own folder to have access to all approver actions. E-mail reminders will be sent out automatically by the system for requisitions not approved.

To access myUF Markeplace as an approver:

- a. Log on to **http://my.ufl.edu** using your Gator Link username and password.
- b. Click Nav bar > Main Menu > Financials > eProcurement > myUF Markeplace.

Locate & Sort Requisitions

- 1. Locate your requisitions to be approved in two locations:
  - a. Click **Action Items** in the top menu to display a flyout menu that displays **My Assigned Approvals & Unassigned Approvals.**

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	All 🔻	Search (Alt+Q)	2,223.00 USD 凄	♡ /₽	* 1
Go to: Non-Catalog Item		ion Items			tracts
	Una	ssigned Approvals			
	Requ	uisitions		5	
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	Cha	nge Request		•	

 b. Or locate approvals by clicking the **Orders** icon in the left navigation bar. Click **Approvals > Requisitions to Approve**

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6	Orders	Quick search	٩
8	Search My Orders	Requisitions to Approve Change Requests to Appro	we
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- 2. Filter and sort the list to help review and select requisitions to approve. For example, filters and sorting may help you find the oldest requisition in your queue, or requisitions submitted by a certain requestor:
  - a. Click the **Sort by:** dropdown at the top to sort by several options such as:

i. Sort by Total High to LowSort by Submit Date Oldest First Note: The system will sort requisitions within each folder.

<b>*</b>	<sup>my</sup> uf marketplace				All 👻 S	Search (Alt+Q) Q 2,2	23.00 USD 📜 🗢 🏴	• •
	Orders + Approvals + Requisitions to Approve							
	Group Results By: List 🗸							
		Showing 1 - 20 of 103 Results		All Dates			Assign	<b>√</b> G
		Results Per Page 20		Sort by: Submit date newest f	irst 🗸		I Page	1 🕶 of 6 🕨 1
	Filtered by	Show requisition details						
	Type: Requisitions Date Range: All Dates	Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
	View Approvals For: Gator Buyer	2 148672975 🕰	Bio Quip Products Inc	Not Assigned	9/14/2021 10:31 AM	Kristen Ray	174.34 USD	Assign
		2 148673420 🗟 🛙 🕕	UF Procurement	Not Assigned	9/14/2021 10:27 AM	Christina Lake	1,000.00 USD	Assign
		<i>2</i> 148665196 🕰	Corning Inc	Not Assigned	9/14/2021 10:26 AM	Kendra Mckee	307.20 USD	Assign
	Filter My Approvals ? Type	2 145781536 🖄 🗐	Eagle Carpet Restoration Inc	Not Assigned	9/14/2021 9:58 AM	Charlotte Nagy	11,084.16 USD	Assign
	Requisitions 🗸	<i>@</i> 148670312 🗟 🛙	UF Procurement	Not Assigned	9/14/2021 9:49 AM	Margaret Somers	152.00 USD	Assign
	Date Range	<i>≈</i> 148667853 🗟 🕅	Ebony D Terrell Shockley	Not Assigned	9/14/2021 9:24 AM	Christina Oxer	45,000.00 USD	Assign
	All Dates V	<i>₹</i> 148667400 🗟 🛙	Elife Sciences Publications Ltd	Abigail Deal	9/14/2021 9:19 AM	Christa Stout	3,000.00 USD	Assign
	AI DUID	<i>₹</i> 148612390 🗟 🛙	Chen Garner & Stevens Partners LLC	Not Assigned	9/14/2021 9:05 AM	Ella Bayer	15,968.31 USD	Assign

- b. Filter the list by clicking on one of the items displaying a number in parentheses in any of the filters on the left-hand menu. For example, you may filter by:
  - i. List or Folder on the top left
  - ii. Requestor
  - iii. Supplier
  - iv. Type such as Requisition or Change Requests
- c.

roup Results By:			
Filtered by			
Туре:	Requisitions		
Date Range:	All Dates		
View Approvals	For: Gator Buyer		
Filter My Appro	ovals		?
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Туре	ovals	~	?

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#### Assign the Requisition

1. Assign the requisition prior to approving to ensure all options are available to you in the actions dropdown on the top right for multiple requisitions or any checked requisitions, or click on **Assign** button at the end of its row.

### Open & View

- 1. Before approving you need to open and view a requisition. Click the **requisition number link** to view it.
- 2. Check the requisition line-by-line, and verify:
  - a. Items being purchased
  - b. Shipping and Billing
  - c. PO Business Unit and ChartFields
  - d. Commodity Code
  - e. Internal Notes (these go to approvers)
  - f. External Notes (these go to the vendor)
  - g. Total Amount of Requisition

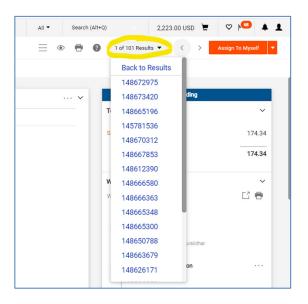
#### Approve or Reject

1. To approve from within the requisition, click the orange **Approve** button at the top right. For other options, click the **small arrow on the right**, next to the Approve button to get a dropdown with options.

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Requisition • 14867	/29/5 •				<u> </u>	🖶 🔞 1 of 101 Results 🔻	< Approv
Summary PO Preview	Comments 1 Attachments	History					Return to Shared F
							Place on Hold
Cart Information	Ø ····	Ship To	ø ····	Bill To and PCard	ø ··· v	Pendi	Return to Requisit
Status	C Pending Buyer Sourcing (Gator Buyer)	Ship To		Bill To		Total (174.34 USD)	Forward to
Submitted	9/14/2021 10:31 AM	Attn: Dr. Stern Room/Area: VC - 87		Attn: UF Accts Payable - Adam Stern PO Box 3357		Subtotal	Reject Requisition
Cart Name	2021-09-14 51775201 01	2015 SW 16TH AV GAINESVILLE, FL 32610		Scranton, PA 18505 United States			17
Description	no value	United States				What's next?	
Priority	Normal	Delivery Options				Workflow	Ľ
Prepared by	Kristen Ray	Owner Phone	+1 352-294-4052			Submitted	
Prepared for	Manavi Muralidhar	Requested Delivery/Due	no value			9/14/2021 10:31 AM Kristen Ray	
Payment Handling Code	no value	Date				On behalf of: Manavi Mur	alidhar
Payment Handling Justification	no value	Business Purpose	For rearing entomological evidence that can provide an estimate for time of death in stray			Combo Edit Validation Completed	1
Payment Message	no value		cat cases			Financial Approval	
						Approved Dionne Slaughter	
Purchasing Use Only							
Sole Source	×					Completed	
Payment Terms	no value					Buyer Sourcing	
Freight Terms	DES Destination-Freight Included					Active Gator Buyer	
PO Clauses	Edit   View details						

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2. To return to the list, click the Results on the top and then Back to Results or on any of the requisition numbers listed:



- 3. To **reject only one or several lines** of the requisition, (this only works after assigning to yourself):
  - a. Scroll down to the line level and check the box for the line selected.
  - b. Click the **the tiny black triangle at the Line Items level**, and click **Reject Selected Items**.

Requisition • 14865420	8 •						$\equiv$	• 🖶 🕄	1 of 104 Results 💌	Approve
Summary PO Preview C	Comments 1 Attachments	History								
									Pending	
4 Items						1	o -{	Total	(240.00 USD)	````
BioLegend Inc · 4 Items ·	240.00 USD							Reject Sele Change Suj		240.0
SUPPLIER DETAILS								Add to Fave		240.0
	no value	PO Number Quote number	To Be Assigned BL-UF-2021					Add to Draf		C2 🖷
Customer Number	no value	Quote number	BL-0F-2021				L	Change Co		
Status Item		Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		C C	Submitted 9/14/2021 10:56 AM Alice Bliss-Dodd	
1 😋 Propidium Iodia	de Solution-	421301	EA (Each)	45.00	2 EA (Each)	90.00			On behalf of: Dinalynn Michaels	
∧ ITEM DETAILS								(~	Combo Edit Validation	
Contract:	no value		Internal Note		code BL-UF-2021 for	discount.				
Commodity Code		nd scientific equipment and	Internal Attachments	Add				6	Financial Approval	
	accessories		External Note	Please use of	code BL-UF-2021 for	discount.			Approved Bradley Furr	
			Attachments for suppl	ier Add						
			Quote	no value				G	Budget Validation Completed	



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4. To add a Comment, click on the **Comment** tab on the top, then click on the plus (+) sign to add a new comment:

合	<sup>my</sup> uf marketplace	All 👻 Search (Alt+Q) 💿 2,223.00 USD 📜 😎 🏴	• 🔺 💶
7	Requisition • 148654208 •	☐ ② 1 of 104 Results ▼ 〈 > Ar	oprove 💌
6	Summary PO Preview Comments 0 Attachments History		
		Pending	
8	Records found: 1	Show comments for Requisition Total (240.00 USD)	~
血	Dinalynn Michaels - 9/13/2021 5:17:30 PM	Requisition - 148654208 Requisition assigned 5 👕 Subtotal	240.00
뫒	Thanks Alicet :)		240.00
nh.			
		What's next? Workflow	

For further assistance, please e-mail <u>procurement@ufl.edu</u> or call Procurement Services Help Desk at 392-1331.