

Overview

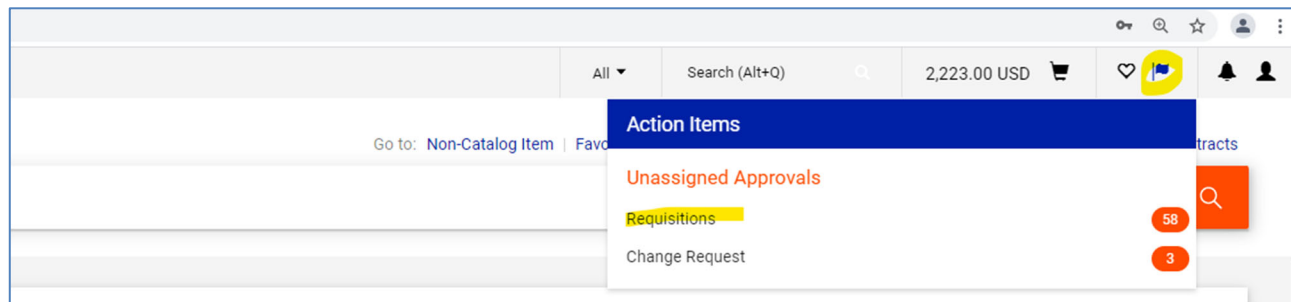
Use this instruction guide to approve a purchasing requisition (PR) in myUF Marketplace. Approvers in myUF Marketplace can approve, modify, add notes, return or deny (reject) a purchasing requisition. Please refer to the instruction guide, "Working with Returned Requisitions." This instruction guide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

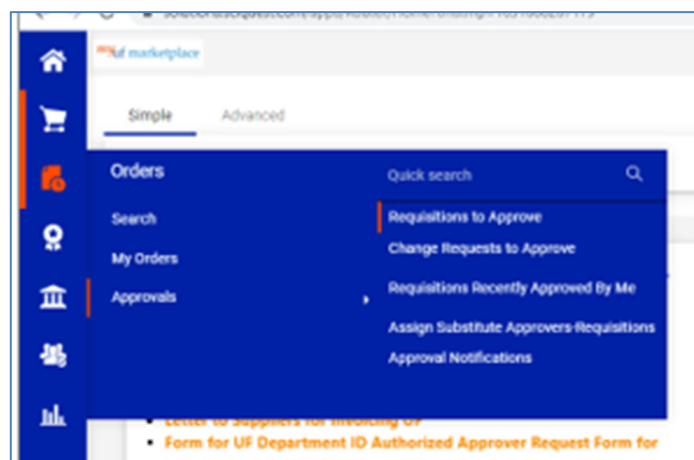
- Log on to **http://my.ufl.edu** using your Gator Link username and password.
- Click **Nav bar > Main Menu > Financials > eProcurement > myUF Marketplace**.

Locate & Sort Requisitions

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

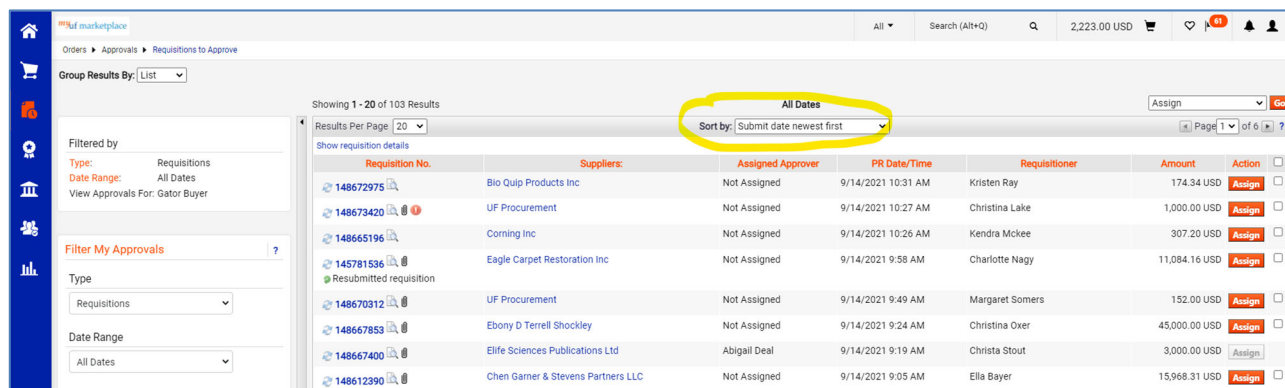


- Or locate approvals by clicking the **Orders** icon in the left navigation bar. Click **Approvals > Requisitions to Approve**



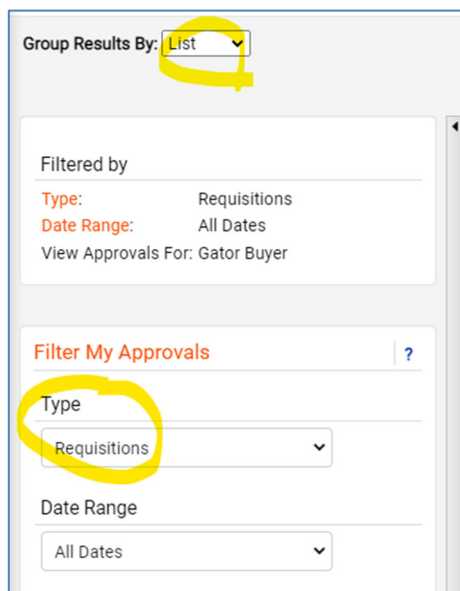
2. Filter and sort the list to help review and select requisitions to approve. For example, filters and sorting may help you find the oldest requisition in your queue, or requisitions submitted by a certain requestor:
 - a. Click the **Sort by:** dropdown at the top to sort by several options such as:
 - i. Sort by Total High to Low
 - Sort by Submit Date Oldest First

Note: The system will sort requisitions within each folder.



- 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.



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

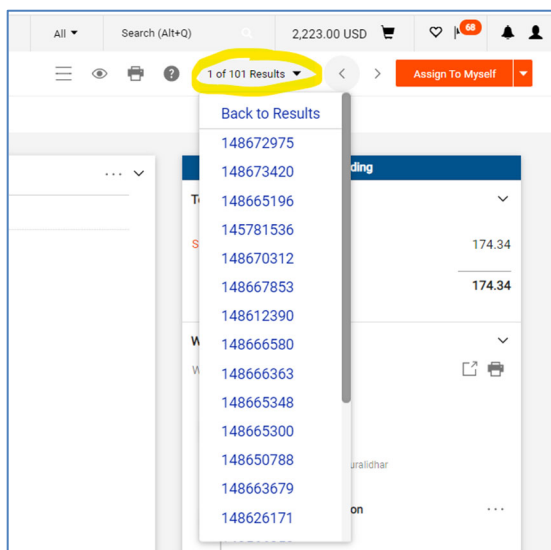
Approve or Reject

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.

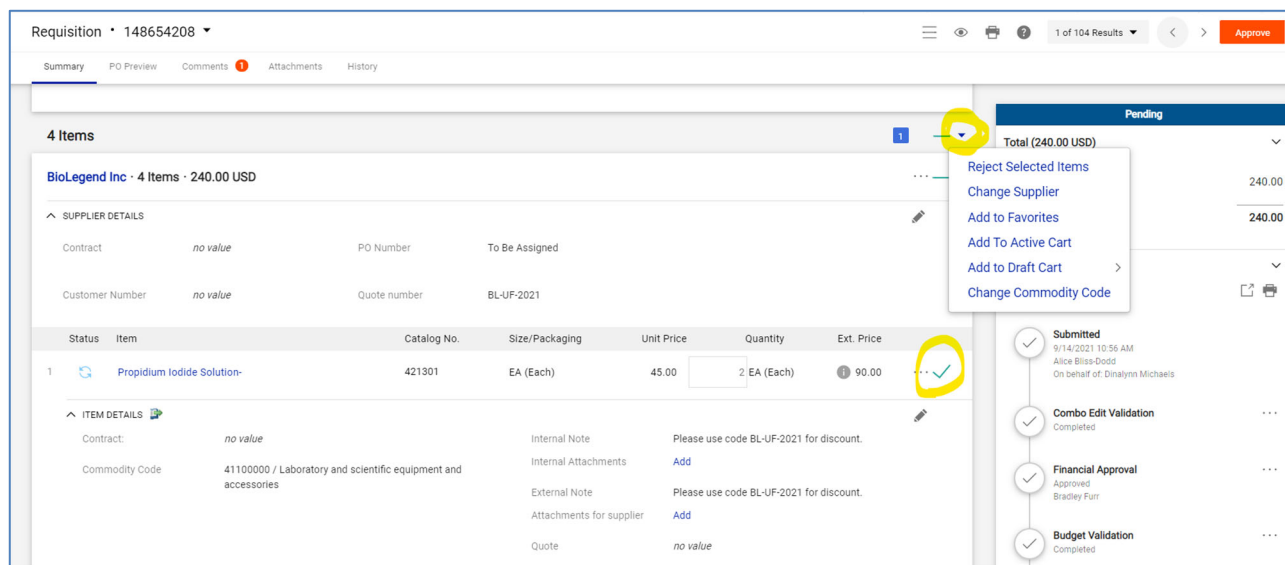
The screenshot displays the 'myUF marketplace' interface for a specific requisition (148672975). The top navigation bar includes a search bar and a currency indicator (2,223.00 USD). The main content area is divided into several sections: 'Cart Information' (Status: Pending, Submitted: 9/14/2021 10:31 AM, Cart Name: 2021-09-14 51775201 01), 'Ship To' (Attn: Dr. Stern, Room/Area: VC - 87, 2015 SW 16TH AV, GAINESVILLE, FL 32610, United States), and 'Bill To and PCard' (Attn: UF Accts Payable - Adam Stern, PO Box 3357, Scranton, PA 18505, United States). A 'Delivery Options' section shows the owner phone and requested delivery date. The 'Purchasing Use Only' section includes fields for Sole Source, Payment Terms, and Freight Terms. On the right side, a 'What's next?' workflow section shows a sequence of steps: Submitted (9/14/2021 10:31 AM), Combo Edit Validation (Completed), Financial Approval (Approved by Dionne Slaughter), Budget Validation (Completed), and Buyer Sourcing (Active, Gator Buyer). A dropdown menu is open next to the 'Approve' button, showing options: Return to Shared Folder, Place on Hold, Return to Requisitioner, Forward to..., and Reject Requisition.

Approving Requisitions in myUF Marketplace

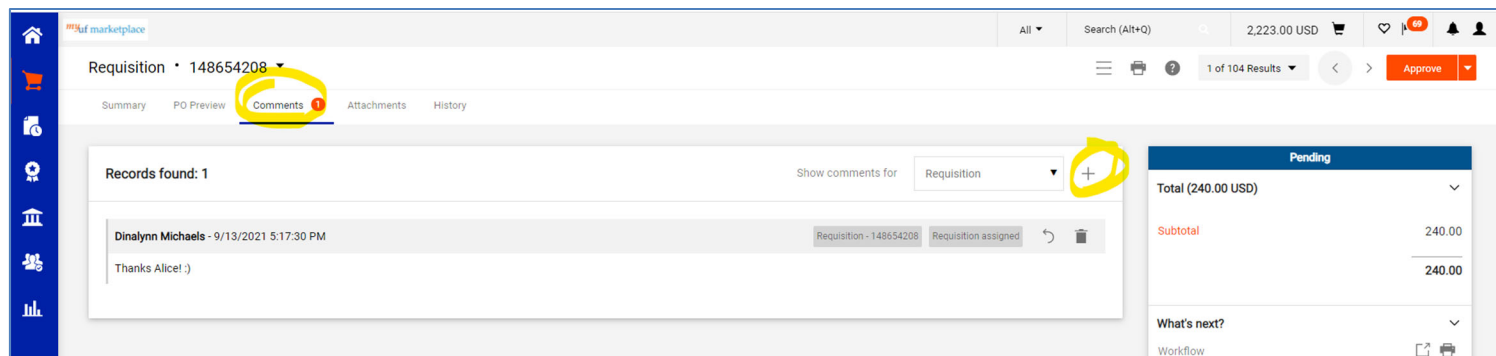
2. To return to the list, click the **Results** on the top and then **Back to Results** or on any of the requisition numbers listed:



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**.



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



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