Approve a Requisition, PO, Change Order or Invoice in myUF Marketplace

Overview

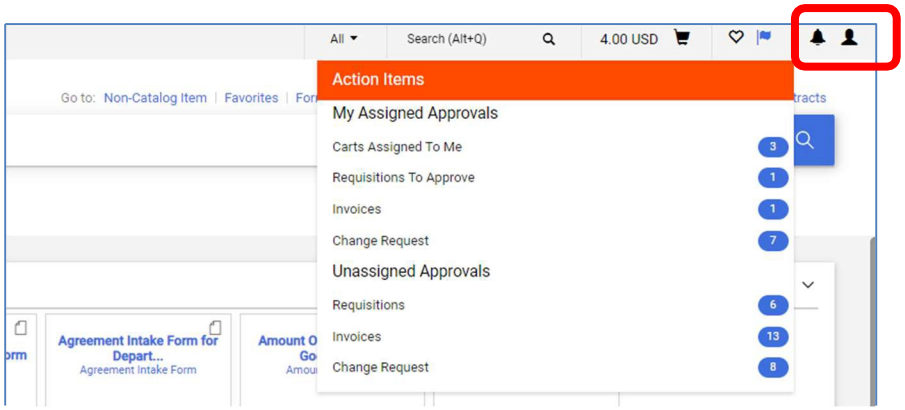
Use this instruction guide to approve a purchasing requisition (PR), change order and/or invoice or PO in myUF Marketplace, depending on your security role setup in myUF Marketplace. This instruction guide is for those who have Financial Approver security in myUF Marketplace and the role, **UF_N_MKT_Financial_Approver**, or similar role. An approver must assign the document to themselves to have access to all approver actions.

To access myUF Marketplace as an approver:

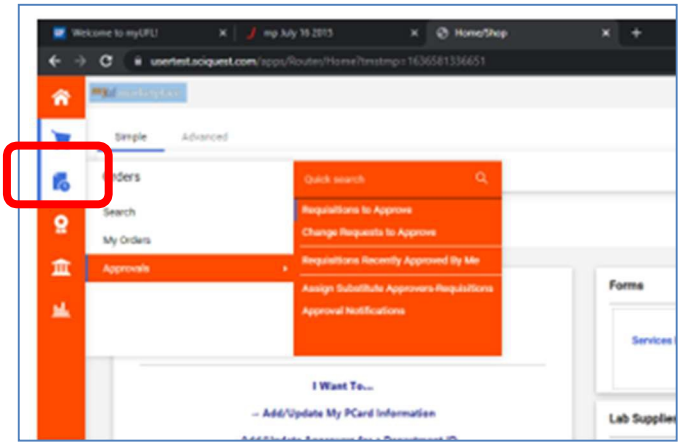
a. Log on to **http://my.ufl.edu** using your Gator Link username and password.
b. Click **Nav bar > Main Menu > Financials > eProcurement > myUF Marketplace.**

Locate & Sort Requisitions

1. Access documents to be approved from two locations:
   a. Click **Action Items** in the top menu to display a flyout menu that displays **My Assigned Approvals** & **Unassigned Approvals and click on any:**



   b. Or, locate approvals by clicking the **Orders** icon in the left menu bar. Click **Approvals > (Select any document to approve such as Requisitions)**



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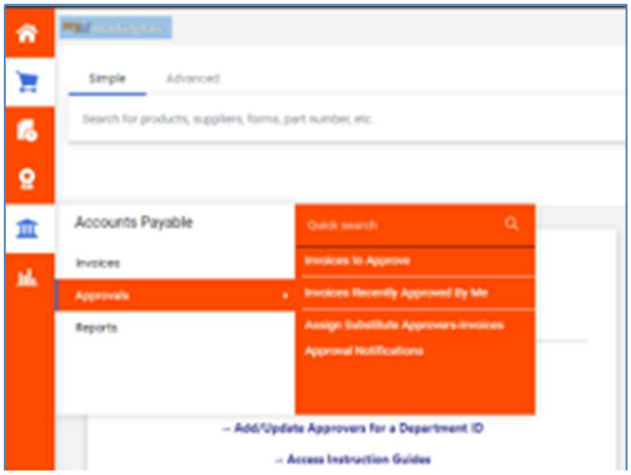
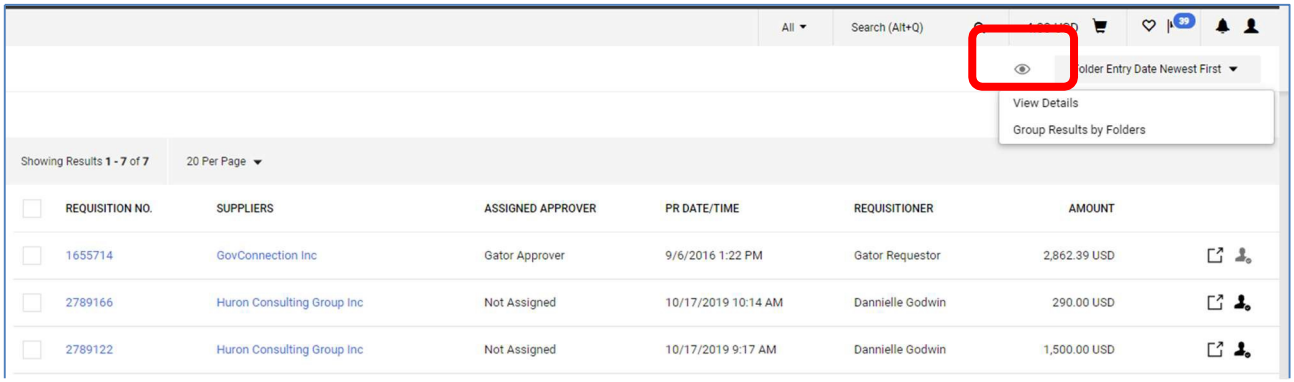
c. For invoices, locate approvals by clicking the **Bank** icon in the left menu bar. Click **Approvals > Invoices to Approve:**



2. **At the list, click the eyeball symbol on the top right** to view as list or folder:



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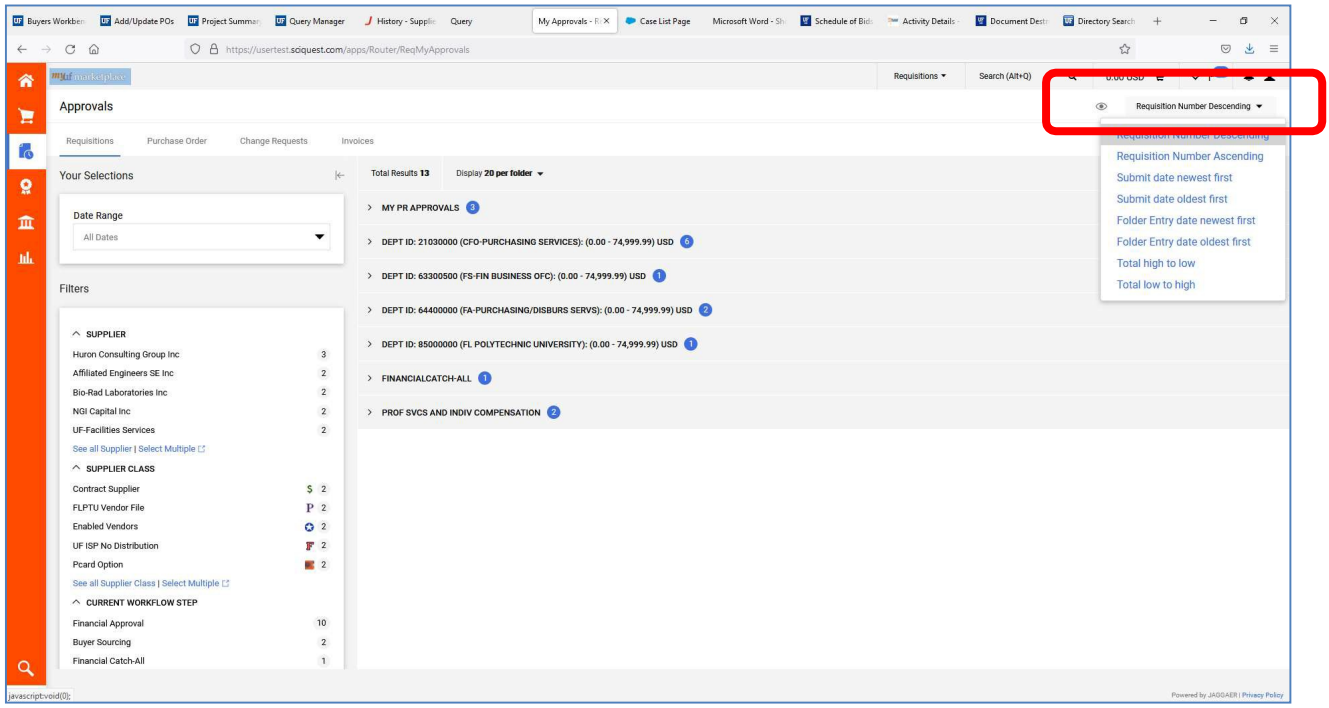
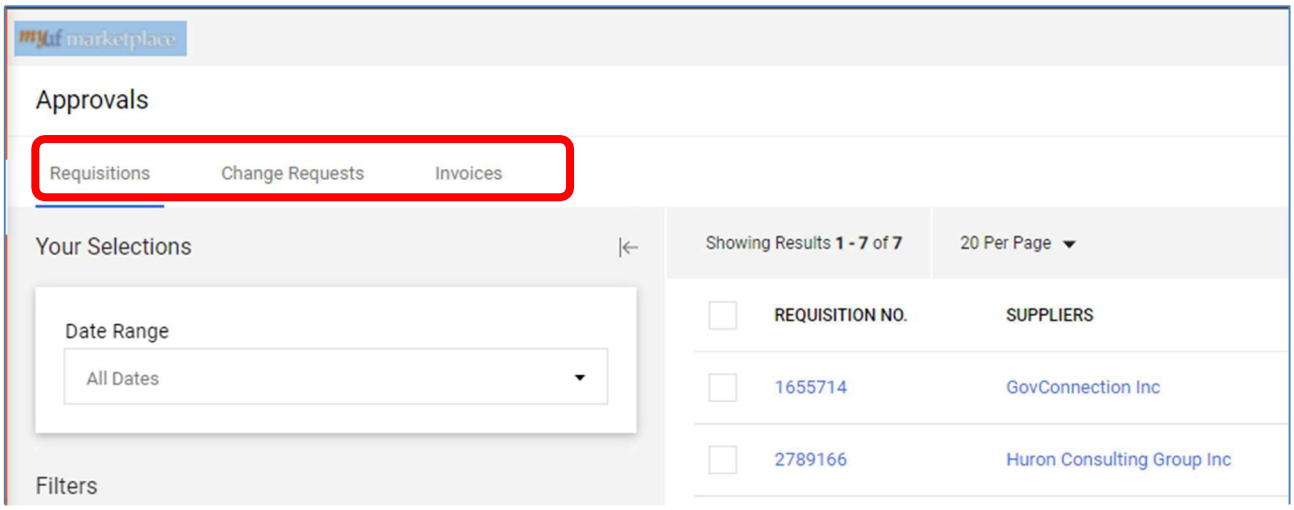
3. **Use the dropdown to sort:**



4. Use the column headings at the top left to select **Requisitions, Purchase Order, Change Requests or Invoices** which will appear depending on your security role:



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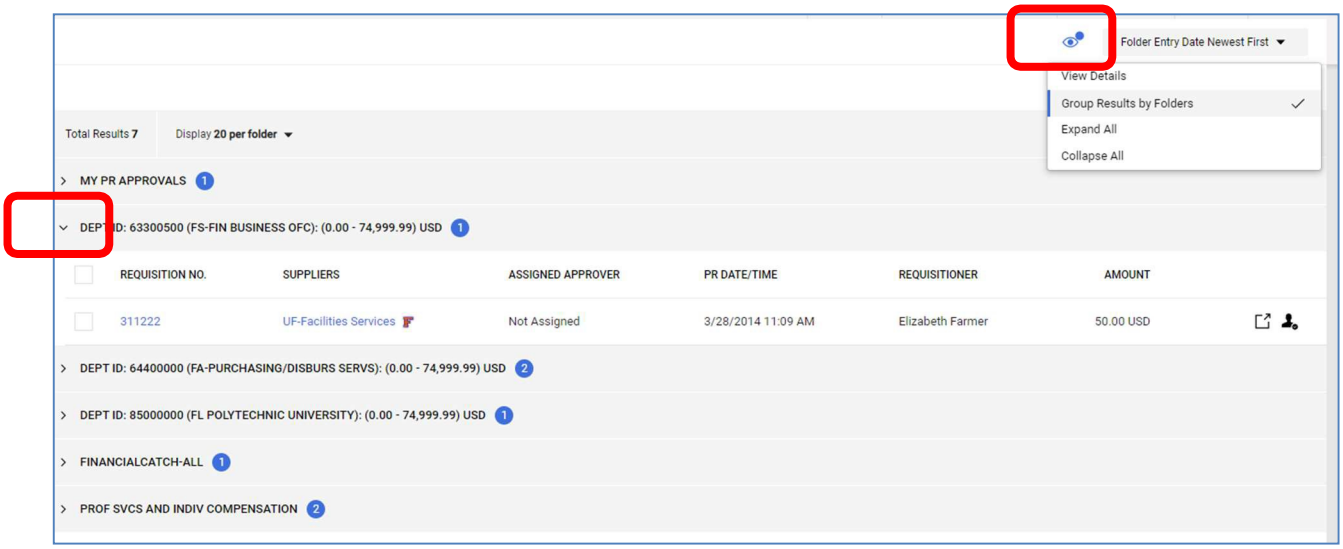
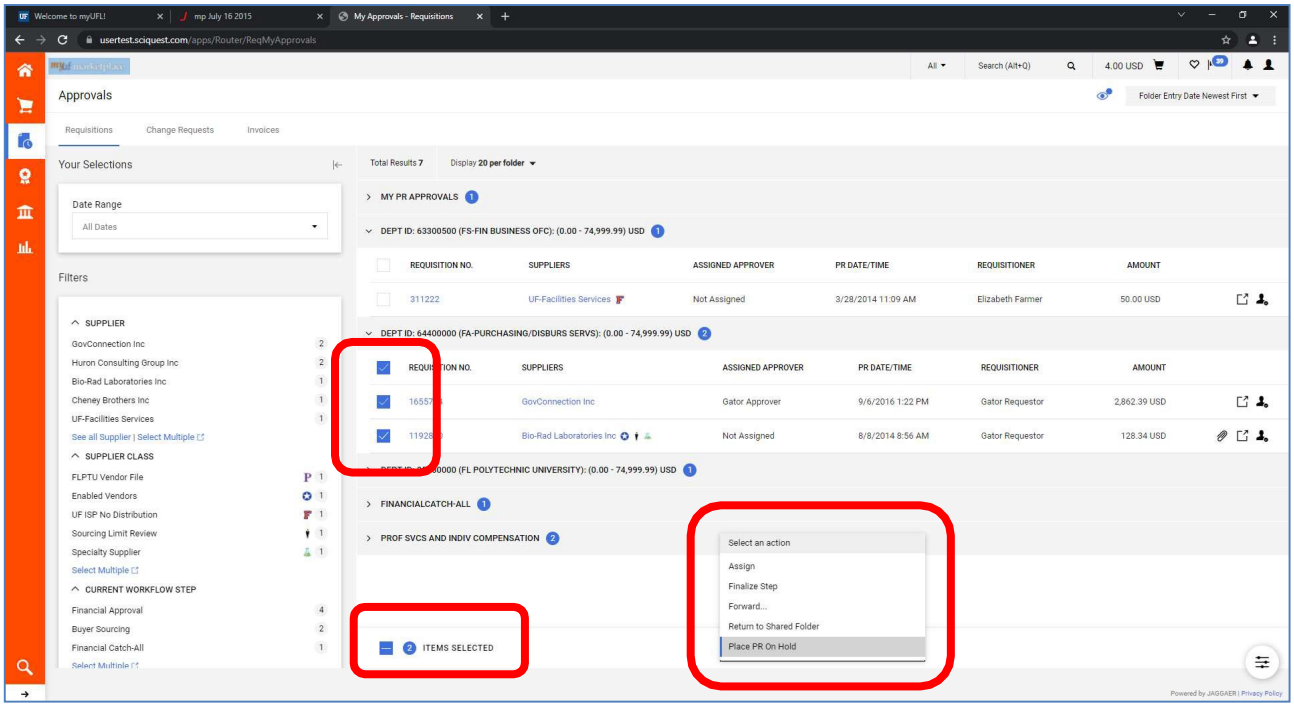
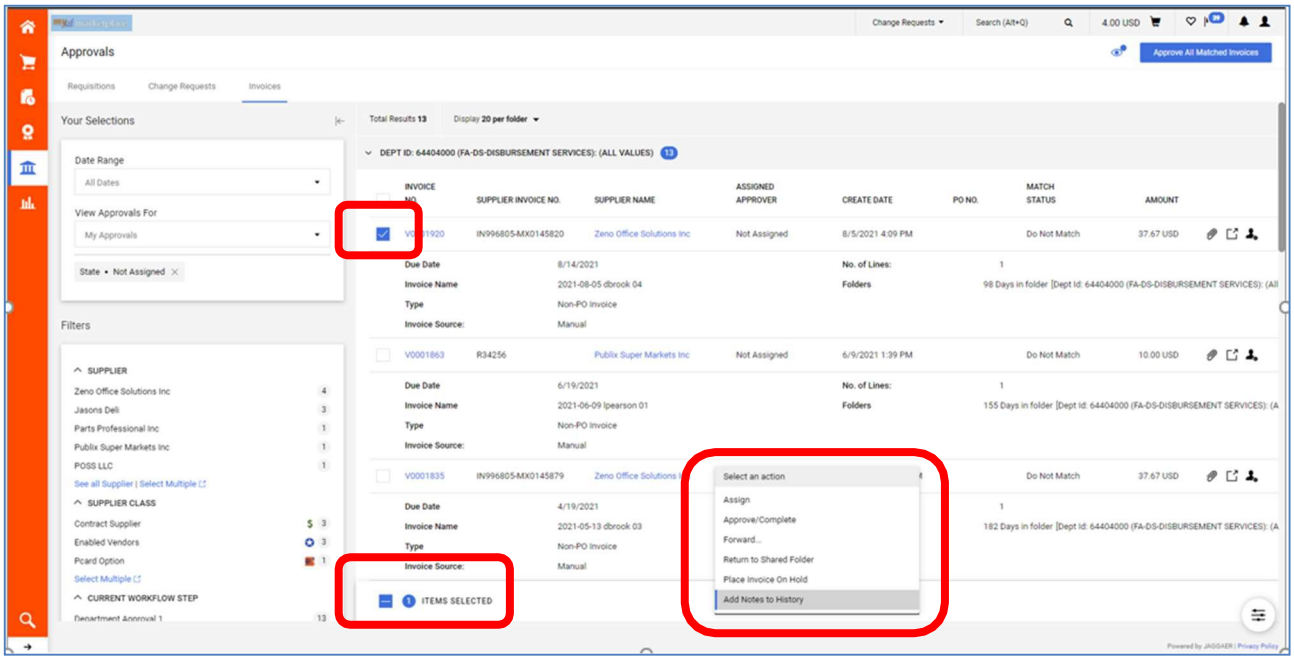
5. Click the **arrow** to open a folder, if you are using the folder view, or click the **Eyeball icon** to click on Expand All:



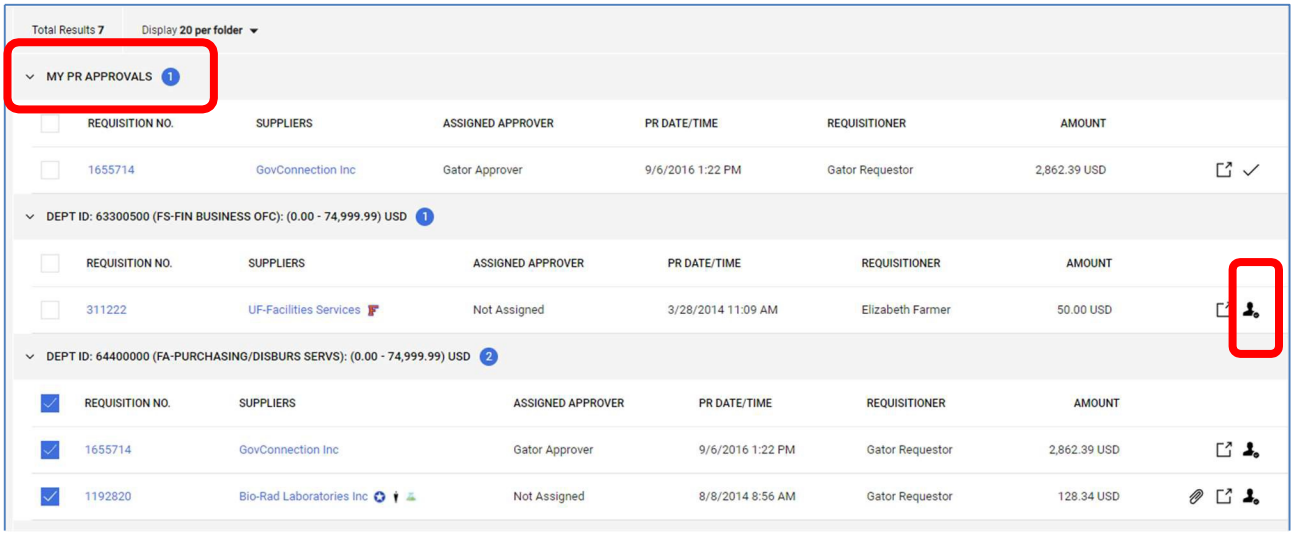
6. To take action on a document, check the box for one or more, and **a dropdown will display at the bottom with actions to take on all checked:**



For Invoices:



7. You may also **click the person symbol on the right of each document** to assign it to yourself; the document will show in your MY PR APPROVALS folder (or MY INVOICE APPROVALS folder). Click the checkbox to approve it from this screen.



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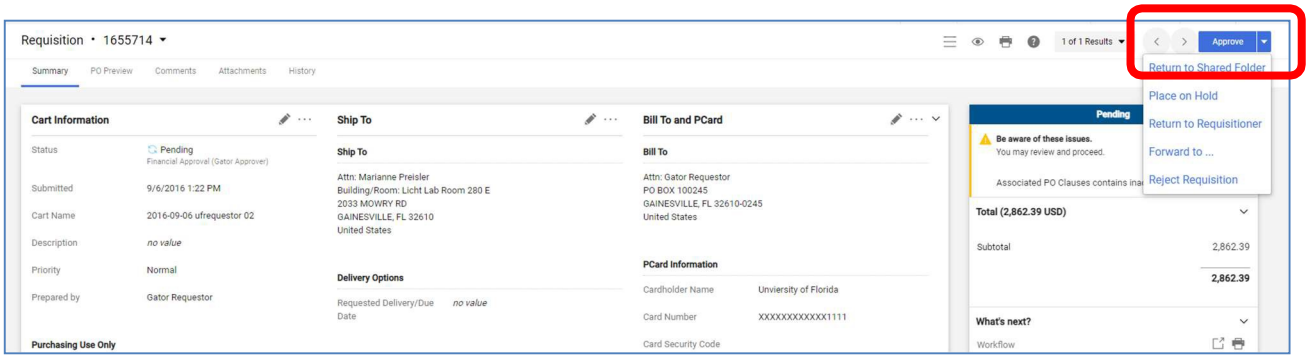
To Open & View

1. Before approving you need to open and view the document. Click the **document number link** to view it.

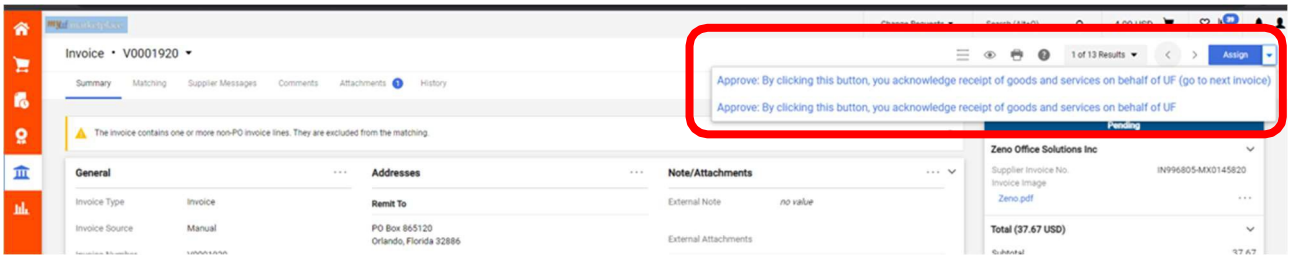
2. Click line-by-line, and verify:
    a. Items being purchased
    b. Shipping and Billing
    c. PO Business Unit and ChartFields
    d. Commodity Code
    e. Internal Notes (these go to approvers)
    f. External Notes (these go to the vendor)
    g. Total Amount or being paid

Approve or Return to Requisitioner or Adding a Comment

1. To approve from within the document, click the **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.



For Invoices:



Note: You may also click the black triangle next to the invoice, change order or requisition number to get an action dropdown as well.

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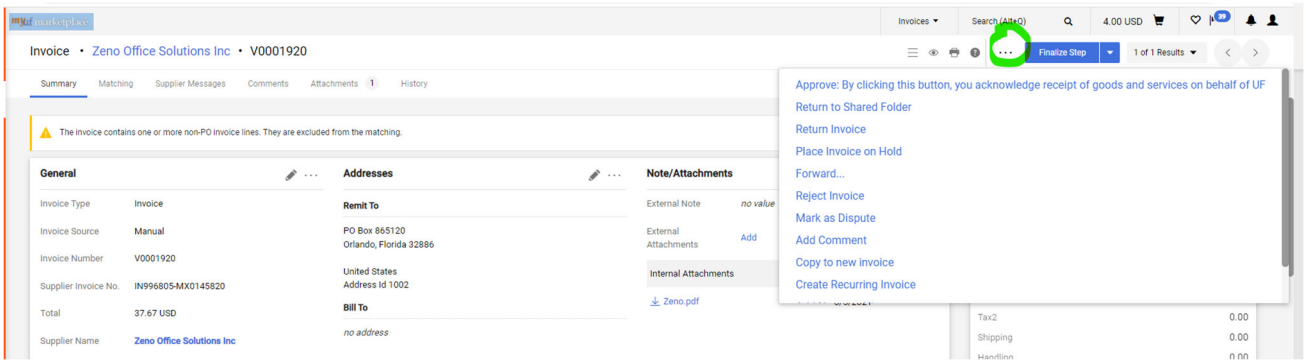
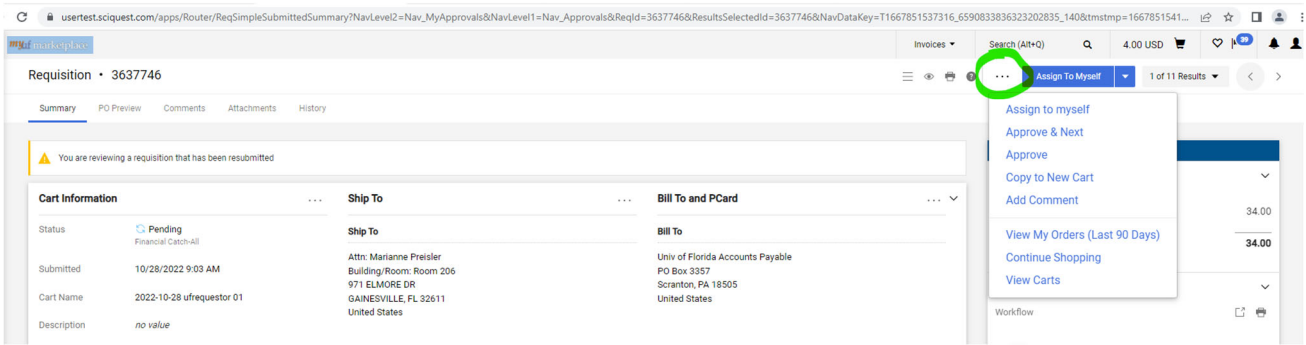
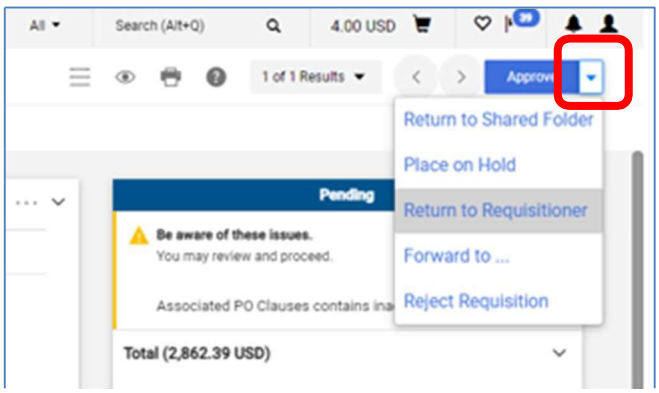
For Invoices:



For Requisitions:



2. To **Return to Requisitioner, click the small triangle next to the Approve button on the top right for the dropdown and select Return to Requisitioner:**



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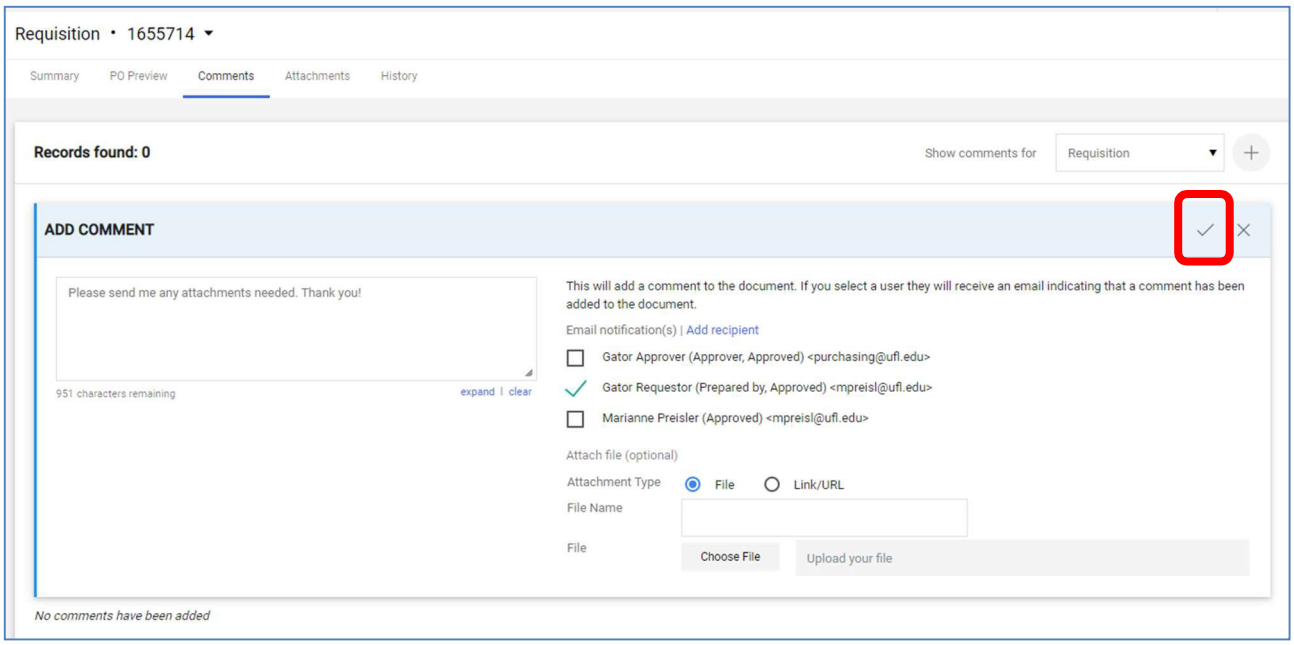
3. To add a Comment, click on the **Comments** tab on the top, then click on the plus (+) sign to add a new comment:

4. To send the comment, click the **green check** on the right:



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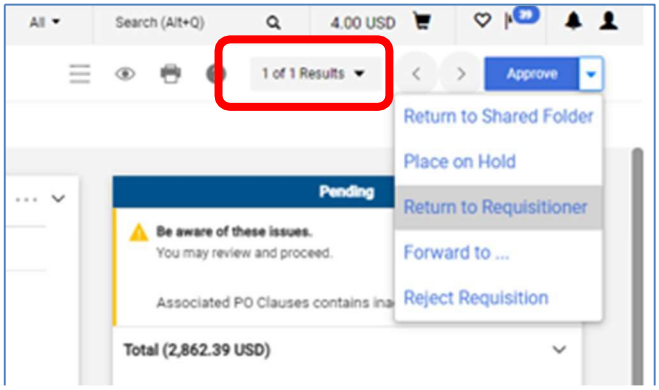
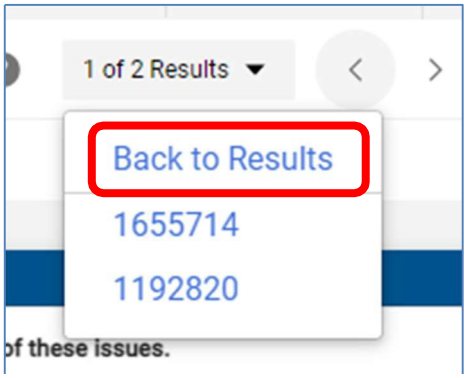
5. To return to your Approval page, click the 1 of 2 Results on the top right then Back to Results:





For further assistance, please e-mail myufmarketplace@ufl.edu or call the myUF Marketplace HelpDesk at 392-1335.

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