

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

### Overview

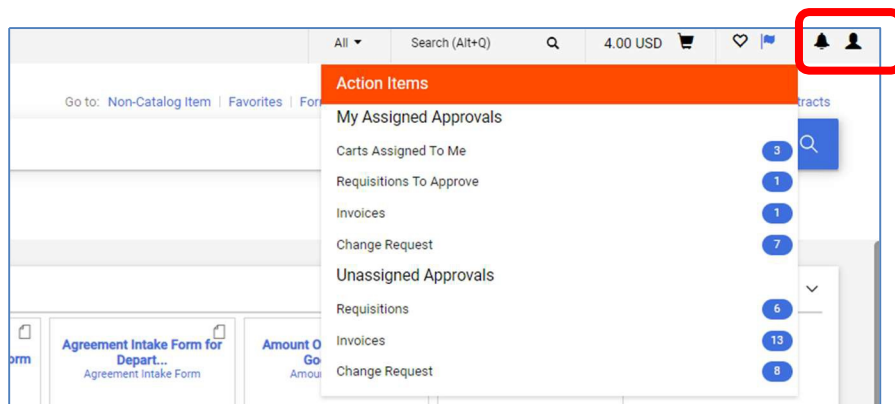
Use this instruction guide to approve a purchasing requisition (PR), change order and/or invoice or PO in myUF Marketplace, depending on your security role setup in myUF Marketplace. This instruction guide is for those who have Financial Approver security in myUF Marketplace and the role, **UF\_N\_MKT\_Financial\_Approver**, 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:

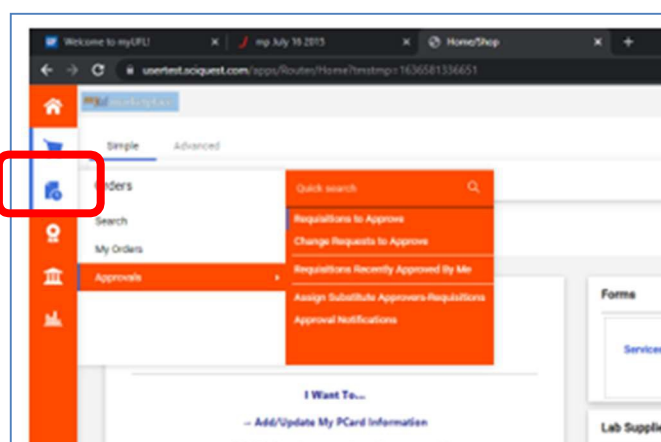
- Log on to **http://my.ufl.edu** using your Gator Link username and password.
- Click **Nav bar > Main Menu > Financials > eProcurement > myUF Marketplace**.

### Locate & Sort Requisitions

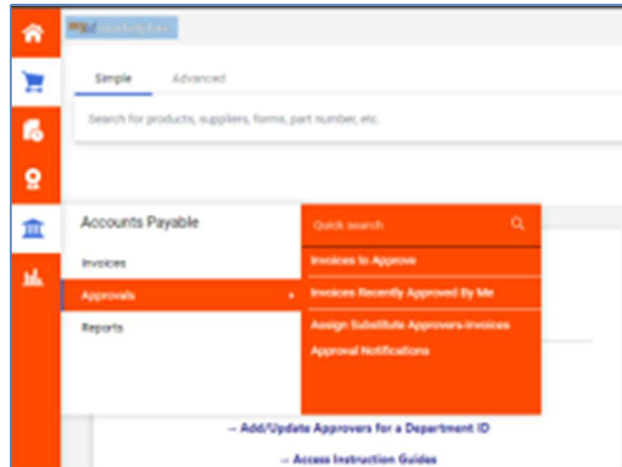
- Access documents to be approved from two locations:
  - Click **Action Items** in the top menu to display a flyout menu that displays **My Assigned Approvals & Unassigned Approvals** and click on any:



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



- 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:

The screenshot shows the myuf marketplace interface with a list of requisitions. The top right corner features a search bar, a shopping cart icon, a heart icon, a notification bell, and a user profile icon. An eyeball icon is highlighted with a red box. Below the search bar, there is a dropdown menu with options: 'Folder Entry Date Newest First', 'View Details', and 'Group Results by Folders'. The main content area displays a table of requisitions with columns: REQUISITION NO., SUPPLIERS, ASSIGNED APPROVER, PR DATE/TIME, REQUISITIONER, and AMOUNT. The table shows three rows of data.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
1655714	GovConnection Inc	Gator Approver	9/6/2016 1:22 PM	Gator Requestor	2,862.39 USD
2789166	Huron Consulting Group Inc	Not Assigned	10/17/2019 10:14 AM	Dannielle Godwin	290.00 USD
2789122	Huron Consulting Group Inc	Not Assigned	10/17/2019 9:17 AM	Dannielle Godwin	1,500.00 USD

### 3. Use the dropdown to sort:

The screenshot shows the 'Approvals' page in the myuf marketplace. A red box highlights the 'Requestion Number Descending' dropdown menu in the top right corner. The page displays a list of approvals with columns for Requisitions, Purchase Order, Change Requests, and Invoices. The left sidebar contains filters for Date Range, Supplier, Supplier Class, and Current Workflow Step.

### 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:

The screenshot shows the 'Approvals' page in the myuf marketplace. A red box highlights the 'Requisitions' tab in the top left corner. The page displays a list of requisitions with columns for Requisition No. and Suppliers. The left sidebar contains filters for Date Range and Filters.

REQUISITION NO.	SUPPLIERS
1655714	GovConnection Inc
2789166	Huron Consulting Group Inc

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

Total Results 7 Display 20 per folder

> MY PR APPROVALS 1

▼ DEPT ID: 63300500 (FS-FIN BUSINESS OFC): (0.00 - 74,999.99) USD 1

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
311222	UF-Facilities Services	Not Assigned	3/28/2014 11:09 AM	Elizabeth Farmer	50.00 USD

> DEPT ID: 64400000 (FA-PURCHASING/DISBURS SERV): (0.00 - 74,999.99) USD 2

> DEPT ID: 85000000 (FL POLYTECHNIC UNIVERSITY): (0.00 - 74,999.99) USD 1

> FINANCIALCATCH-ALL 1

> PROF SVCS AND INDIV COMPENSATION 2

- 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**:

Welcome to myuf! | mp July 16 2013 | My Approvals - Requisitions

Approvals

Requisitions Change Requests Invoices

Your Selections

Date Range: All Dates

Filters

SUPPLIER

- GovConnection Inc
- Huron Consulting Group Inc
- Bio-Rad Laboratories Inc
- Cheney Brothers Inc
- UF-Facilities Services
- (See all Supplier) Select Multiple

SUPPLIER CLASS

- FLPTU Vendor File
- Enabled Vendors
- UF ISP No Distribution
- Sourcing Limit Review
- Specialty Supplier
- Select Multiple

CURRENT WORKFLOW STEP

- Financial Approval
- Buyer Sourcing
- Financial Catch-All
- Select Multiple

Total Results 7 Display 20 per folder

> MY PR APPROVALS 1

▼ DEPT ID: 63300500 (FS-FIN BUSINESS OFC): (0.00 - 74,999.99) USD 1

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
311222	UF-Facilities Services	Not Assigned	3/28/2014 11:09 AM	Elizabeth Farmer	50.00 USD

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REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
16555	GovConnection Inc	Gator Approver	9/6/2016 1:22 PM	Gator Requestor	2,862.39 USD
11928	Bio-Rad Laboratories Inc	Not Assigned	8/8/2014 8:56 AM	Gator Requestor	128.34 USD

> DEPT ID: 85000000 (FL POLYTECHNIC UNIVERSITY): (0.00 - 74,999.99) USD 1

> FINANCIALCATCH-ALL 1

> PROF SVCS AND INDIV COMPENSATION 2

2 ITEMS SELECTED

Select an action

- Assign
- Finalize Step
- Forward...
- Return to Shared Folder
- Place PR On Hold

For Invoices:

The screenshot shows the 'Invoices' section of the myuf marketplace. On the left, there's a sidebar with filters and a 'View Approvals For' dropdown set to 'My Approvals'. The main area displays a table of invoices. A red box highlights the 'ITEMS SELECTED' button at the bottom of the table. Another red box highlights the 'Select an action' dropdown menu for a specific invoice, which includes options like 'Assign', 'Approve/Complete', 'Forward...', 'Return to Shared Folder', 'Place Invoice On Hold', and 'Add Notes to History'.

- 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.

The screenshot shows the 'MY PR APPROVALS' section of the myuf marketplace. At the top, there's a tab labeled 'MY PR APPROVALS' with a red box around it. Below the tab, there's a table of requisitions. A red box highlights the person icon on the right side of a requisition row, which is used to assign the requisition to the user.

## 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.

Requisition • 1655714

Summary PO Preview Comments Attachments History

**Cart Information**

Status: Pending  
Submitted: 9/6/2016 1:22 PM  
Cart Name: 2016-09-06 ufrequestor 02  
Description: no value  
Priority: Normal  
Prepared by: Gator Requestor

**Ship To**

Ship To: Attn: Marianne Preisler  
Building/Room: Licht Lab Room 280 E  
2033 MOWRY RD  
GAINESVILLE, FL 32610  
United States

**Bill To and PCard**

Bill To: Attn: Gator Requestor  
PO BOX 100245  
GAINESVILLE, FL 32610-0245  
United States

**PCard Information**

Cardholder Name: University of Florida  
Card Number: XXXXXXXXXXXX1111  
Card Security Code: [REDACTED]

**Delivery Options**

Requested Delivery/Due Date: no value

**Summary**

Total (2,862.39 USD)  
Subtotal: 2,862.39  
Total: 2,862.39

**What's next?**

Workflow

## For Invoices:

Invoice • V0001920

Summary Matching Supplier Messages Comments Attachments History

**General**

Invoice Type: Invoice  
Invoice Source: Manual

**Addresses**

Remit To: PO Box 865120  
Orlando, Florida 32886

**Note/Attachments**

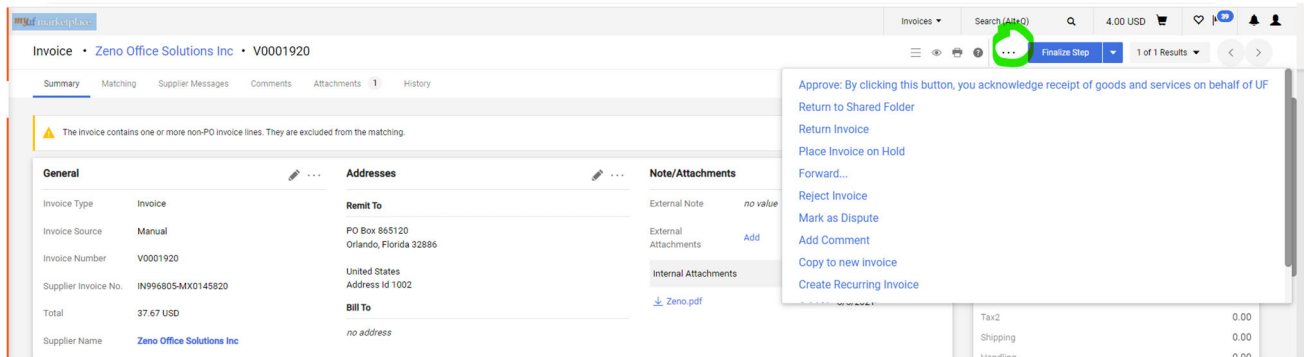
External Note: no value  
External Attachments: [REDACTED]

**Summary**

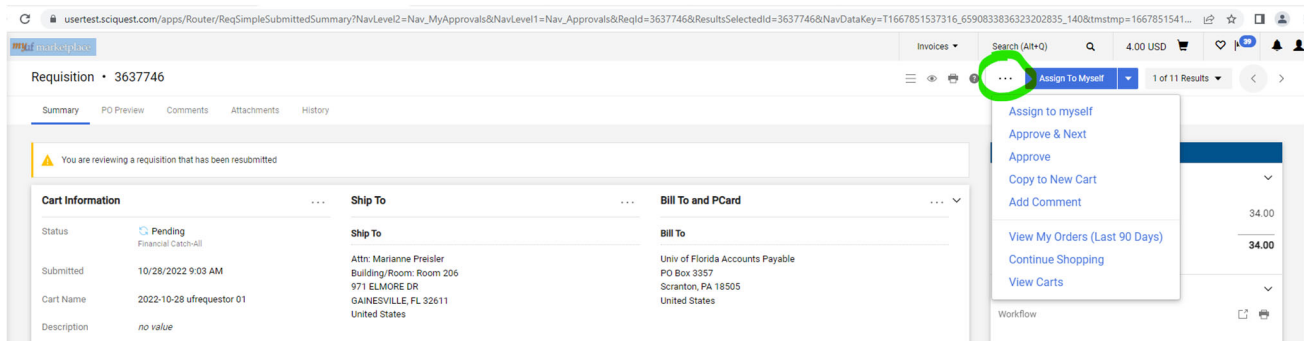
Total (37.67 USD)  
Subtotal: 37.67

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

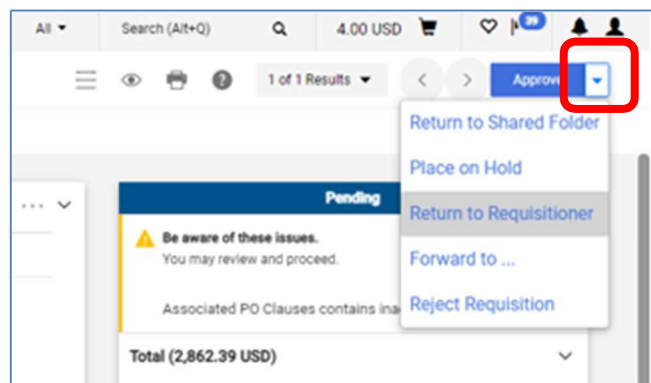
## For Invoices:



## For Requisitions:

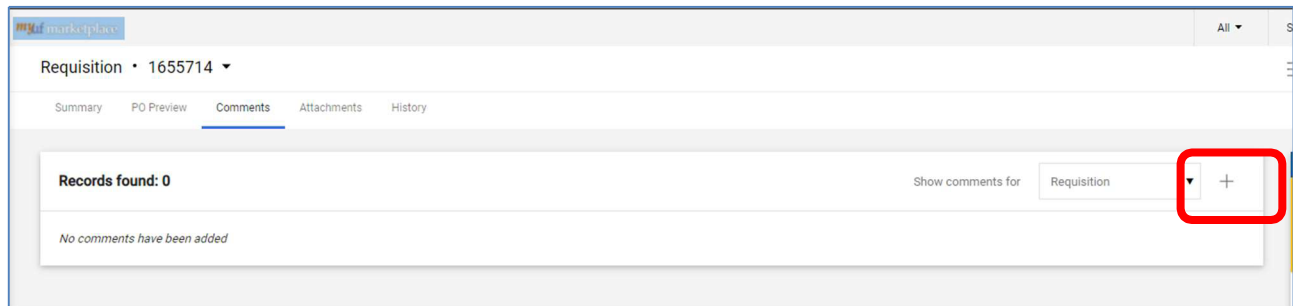


- To **Return to Requisitioner**, click the small triangle next to the **Approve** button on the top right for the dropdown and select **Return to Requisitioner**:





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



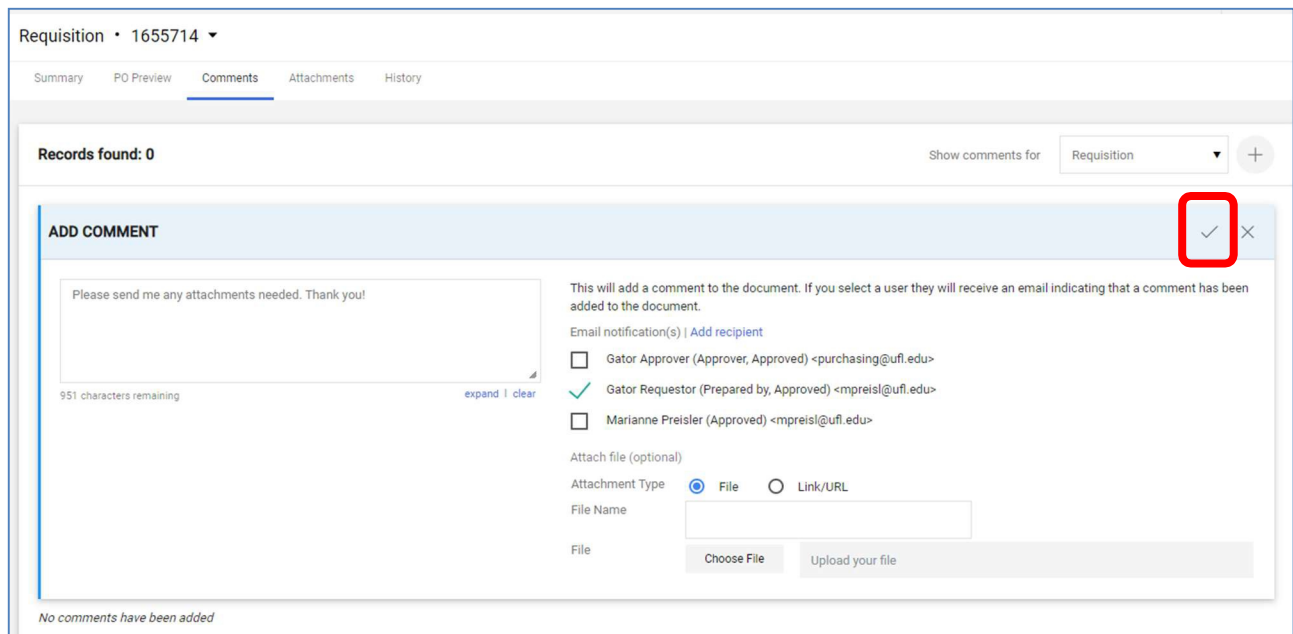
Requisition • 1655714 ▾

Summary PO Preview **Comments** Attachments History

Records found: 0 Show comments for Requisition ▾ +

No comments have been added

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



Requisition • 1655714 ▾

Summary PO Preview **Comments** Attachments History

Records found: 0 Show comments for Requisition ▾ +

**ADD COMMENT** ✓ ✕

Please send me any attachments needed. Thank you!

951 characters remaining expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

☐ Gator Approver (Approver, Approved) <purchasing@ufl.edu>

☒ Gator Requestor (Prepared by, Approved) <mpreis1@ufl.edu>

☐ Marianne Preisler (Approved) <mpreis1@ufl.edu>

Attach file (optional)

Attachment Type ☒ File ☐ Link/URL

File Name

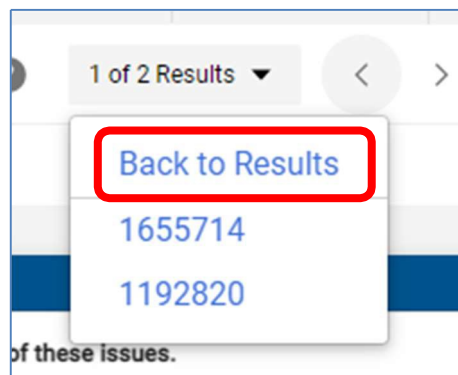
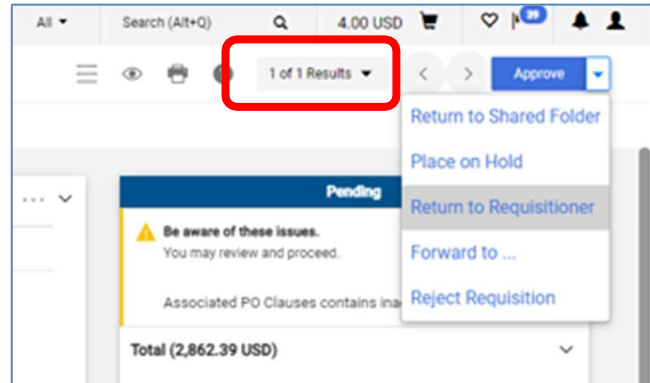
File

Choose File Upload your file

No comments have been added



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](mailto:myufmarketplace@ufl.edu) or call the myUF Marketplace HelpDesk at 392-1335.