How to Approve a Requisition and a Change Order in myUF Marketplace

<u>Overview</u>

Use this instruction guide to approve a purchasing requisition (PR), and/or a change order in myUF Marketplace. Both requisitions and change orders route by the Dept IDs they contain. This instruction guide is for those who have Financial Approver security in myUF Marketplace and the role, UF_N_MKT_Financial_Approver. Financial Approvers need to complete the <u>Financial Approver form</u> with the Dept IDs for which they are financially responsible.

Financial approvers should review the fully opened requisition or change order and check the following:

- 1. Description of items being purchased do they align with the department's business purposes and quotation proposal attached.
- 2. Shipping and Billing
- 3. PO Business Unit and ChartFields
- 4. Commodity Code
- 5. Internal Notes (these go to approvers and procurement agents)
- 6. External Notes (these go to the vendor)
- 7. Business purpose needs to be specific
- 8. Total Amount
- 9. Attachments should include quote provided by vendor and two additional quotations (to show price reasonableness)

Financial approvers may edit the requisition, or return the requisition to the requestor with a comment to make edits, or approve.

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 > My Self Service > myUF Marketplace.

To View Requisitions Awaiting Approval:

1. Click Action Items in the top menu to display a flyout menu that displays My Assigned Approvals & Unassigned Approvals and click on Requisitions:

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2. Click the document number link to view it:

MY	PR APPROVALS						
	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	Ľ \
DEP	T ID: 63300500 (FS-FIN BU	USINESS OFC): (0.00 - 74,999.99) USD 🚺					
	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	C 4
DEP	T ID: 64400000 (FA-PURC	HASING/DISBURS SERVS): (0.00 - 74,999.	99) USD (2)				
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\checkmark	1655714	GovConnection Inc	Gator Approver	9/6/2016 1:22 PM	Gator Requestor	2,862.39 USD	C2 4
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3. Within the requisition or change request, click **Assign to Myself**:

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								Pending	
() Changes wi	ill not be sent to the Supplier.							Total (3.00 USD)	
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Status	Combo Edit Validation		Ship To		Bill To				3.
Submitted	9/30/2021 2:16 PM		Attn: Dianna Brook Building/Room:		Univ of Florida Accounts Payable PO Box 3357			Related Documents	
	2021-09-13 dbrook 02 - CR		971 ELMORE DR GAINESVILLE, FL 32611		Scranton, PA 18505 United States			Purchase Order: UIT1902837	•
Cart Name	2021-09-13 dbfook 02 - CR		United States					Requisition: 3337704	

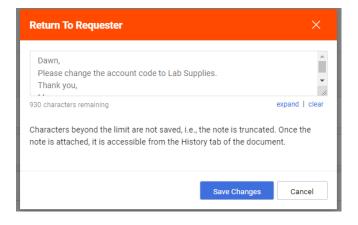
Check the entire requisition or change order per the list on the front page of this guide.

Use the tips below to return the requisition and add a comment, modify or approve.

To return the requisition, click the small triangle next to the **Finalize Step** button on the top right for the dropdown and select **Return to Requester**:

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You are reviewing a requisition that has been resubmitted					n to Shared Folder
Changes will not be sent to the Supplier.				Forwar Be aware of these issues You may review and proc Reject	rd to Change Request
Change Request Reason			/ ~	User is Inactive: Prepared for	
Reason no value				Total (3.00 USD)	
Cart Information	~	Shipping, Handling, and Tax charges are calculated ar charged by each supplier. The values shown here are estimation purposes, budget checking, and workflow			
Status Status Combo Edit Validation (Gator Approver)	Ship To	Bill To		approvals.	and tranking it

Add a Comment and select Save Changes:



To approve the requisition, click on **Finalize Step** or at the dropdown, click **Approve**.

mylf marketplace

Additional Tips

1. At the list, click the View symbol on the top right to view as list or folder:

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Showin	g Results 1 - 7 of 7	20 Per Page 💌					
	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	L. 7
	2789166	Huron Consulting Group Inc	Not Assigned	10/17/2019 10:14 AM	Dannielle Godwin	290.00 USD	Ľ 1.
	2789122	Huron Consulting Group Inc	Not Assigned	10/17/2019 9:17 AM	Dannielle Godwin	1,500.00 USD	Ľ 1.

2. Use the dropdown to sort, or the View icon to expand the folders:

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UF ISP No Distribution	C 2 F 2							
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CURRENT WORKFLOW STEP								
Financial Approval	10							
Buyer Sourcing	2							
Financial Catch-All	1							

Make sure you have Emails and Notifications turned on in your User Profile to receive emails when a requisition is pending and awaiting your approval. Please use this guide, <u>Setting Up Your User</u> <u>Profile</u>.

For further assistance, please contact the myUF Marketplace Help Desk or call 352 392-1335.