UF Training & Organizational Development / Human Resources / UNIVERSITY of FLORIDA

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:
   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.**
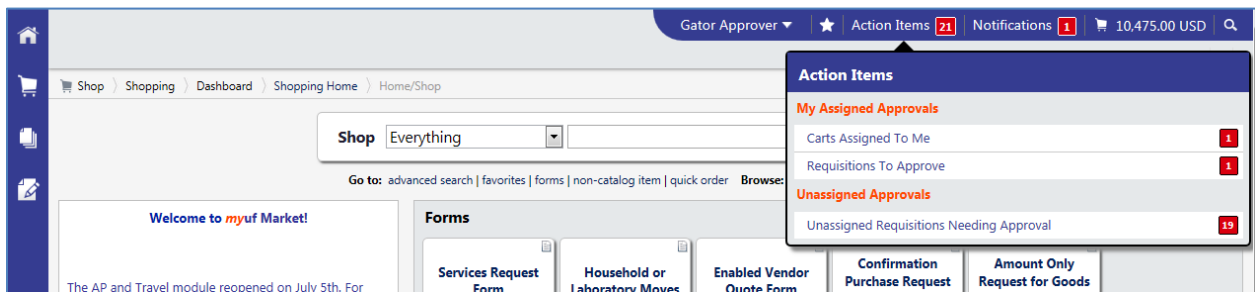

   b. Or locate approvals by clicking the **Orders & Documents** icon in the left navigation bar. Click **Approvals > My Approvals.**
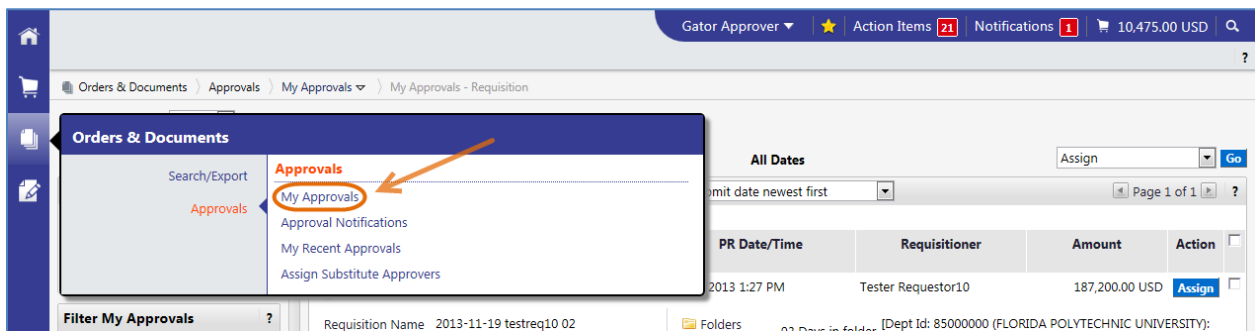
2. Filter and sort the list to help review and select requisitions to approve. For example, filters and sorting may help you find the oldest requisition in your queue, or requisitions submitted by a certain requestor:
   a. Click the **Sort by:** dropdown at the top to sort by several options such as:
      i. Sort by Total High to Low

ii. 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. Requestor
   ii. Supplier
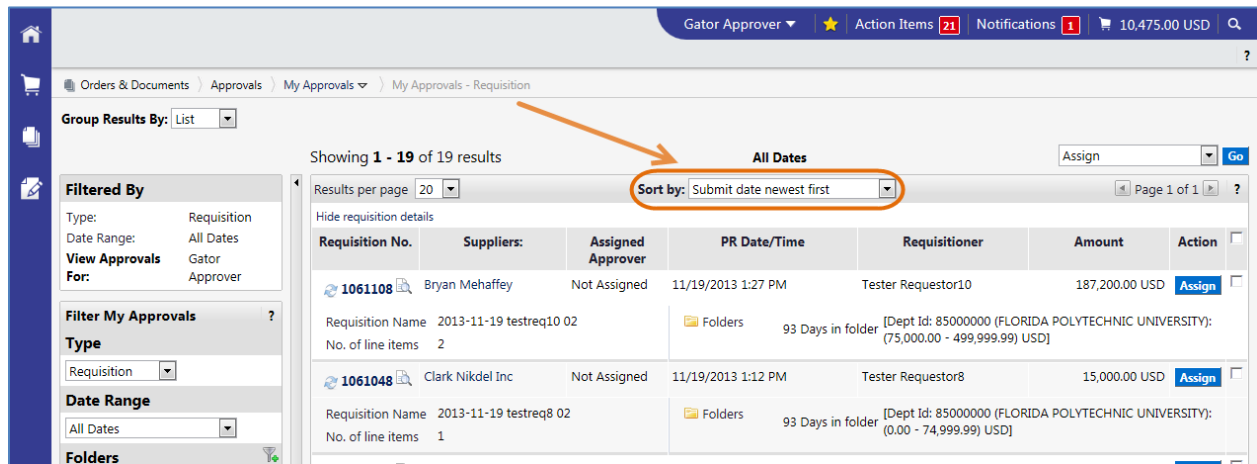
Assign the Requisition

1. Assign the requisition prior to approving to ensure all options are available to you in the actions dropdown.
2. To assign the requisition, click the **Assign** button at the end of its row.
3. To assign multiple requisitions at once, check the box for each one, then click the dropdown at the top and select "Assign," and then click the **Go** button.

Open & View

1. Before approving you need to open and view a requisition. Click the requisition number link.
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 **Available Actions** dropdown at the top right, and select **Approve/Complete step & show next**. Then click the **Go** button.
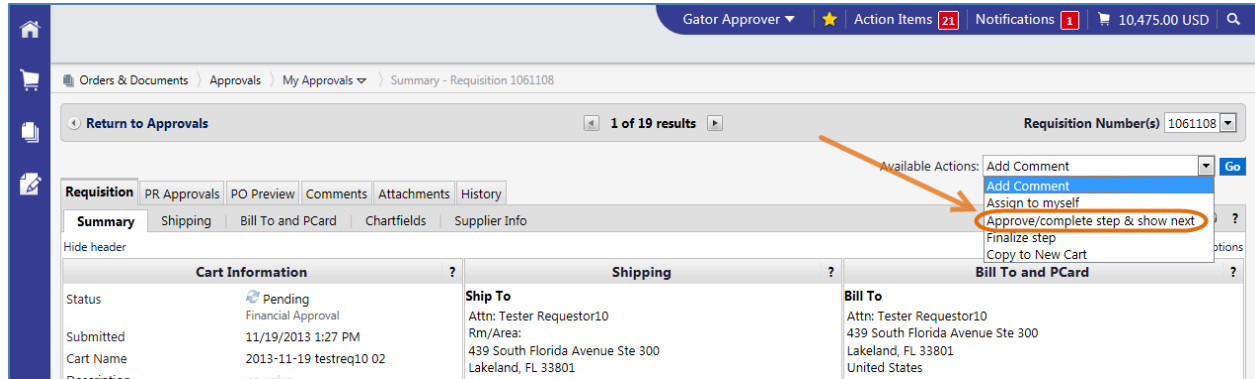
2. **To approve a requisition while listed in a folder**, click the **Approve button** at the end of its row.

3. To reject or return a requisition, assign and click the requisition number link to open the requisition. Click the **Available Actions** dropdown at the top, and **select one of the following:**

   a. **Return to Requisitioner** and click the **Go** button.
      - In the Return to Requisitioner dialog box, complete the Reason for Return and click the **Return to Requisitioner** button. The requisition will be moved to the Outbox and returned to the Requisitioner.

   b. **Reject Requisition** and click the **Go** button.
      - In the Reject Requisition dialog box, complete the PR Reject Reason, and click the **Reject Requisition** button.
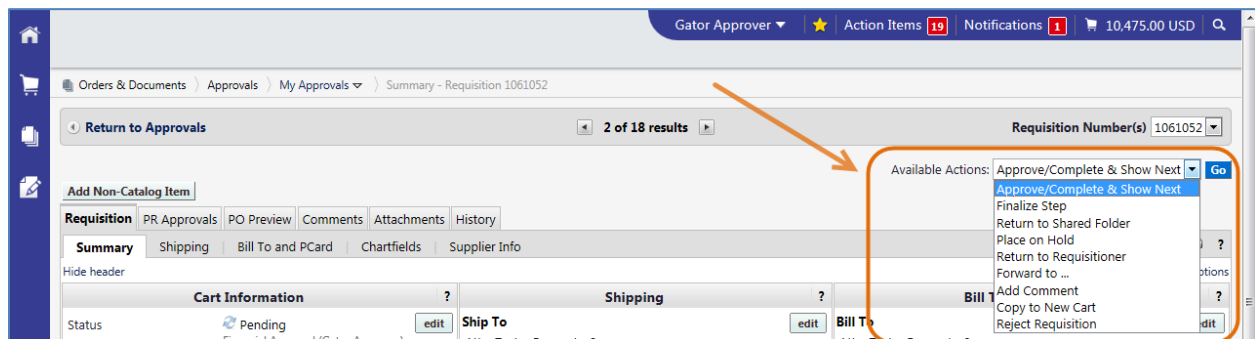
4. To **reject only one or several lines** of the requisition:
   a. Scroll down to the line level and check the box for the line selected.
   b. Click the **For Selected Line Items** dropdown and select **Reject Selected Items**, and then click the **Go** button.
   c. In the Add Note dialog box, complete the Reject Line Reason and click the **Reject Line Item** button.
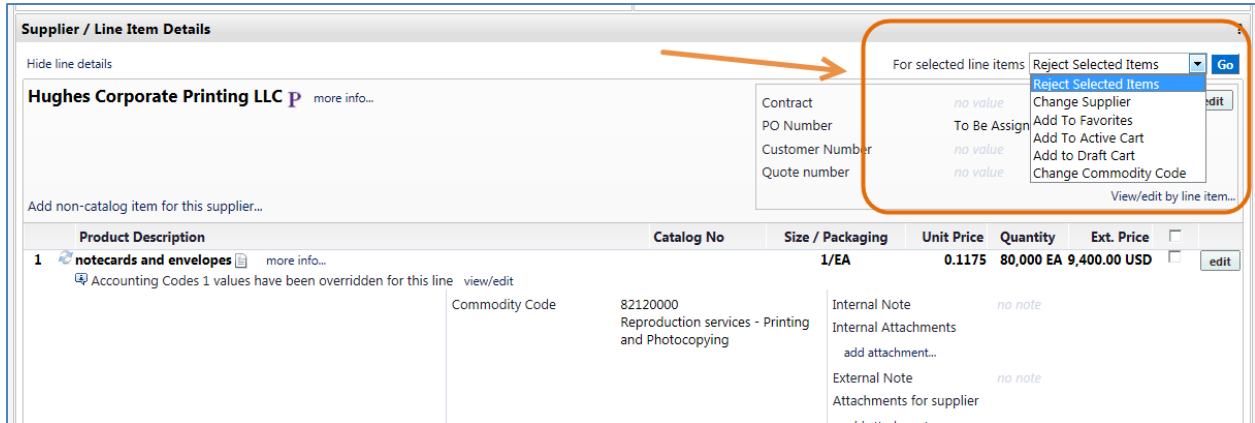
For further assistance, please e-mail procurement@ufl.edu or call Procurement Services Help Desk at 392-1335, or visit https://procurement.ufl.edu/uf-departments/myuf-market/vendors/.