

Using Dashboards for Approvers in myUF Marketplace

Departmental Financial Approvers can navigate to the Approver Dashboard, for an all in one spot quick-glance view of requisitions to be approved, Action Items, Quick Links to UF websites relevant to approving, and an easy to use Document Search to find requisitions or purchase orders in the system. This Dashboard is expressly designed for the Financial Approver.

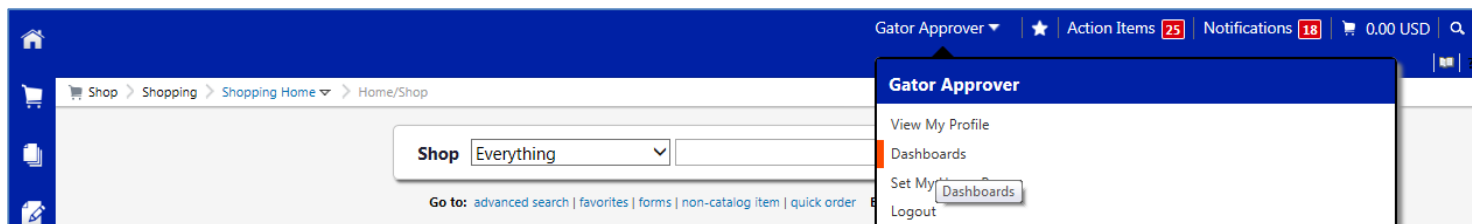
To access myUF Marketplace, logon through the myUFL Portal.

Log on to **http://my.ufl.edu** using your GatorLink username and password

- Click **Nav bar > Main Menu > My Self Service > myUF Marketplace** for the UF_N_MKT_Shopper
- Click **Nav bar > Main Menu > Financials > eProcurement > myUF Marketplace** for the UF_N_MKT_Requestor

Step 1 – Click on Your Name at the top to access the Dashboard

To find and use the Approver Dashboard, click on your name on the top right, then click on Dashboards.



Step 2 – Use the Dashboard for a Quick Glance View

The My Approvals panel shows a list of requisitions waiting for approval. The Action Items panel shows a count. Quick Links has websites for approvers' reference and Document Search allows quick and easy searching for requisitions or purchase orders.

Dashboards > Dashboard for Approvers

Dashboard for Approvers

Dashboard Actions View Another Dashboard

My Approvals

View: Requisition ☐ Only display My Approvals

Number	Name	Folder Name	Days In Folder
1027982	CRIS	PR_ValResponse	800
1192772	2014-08-08 ufrequestor 02	Dept Id: 64400000 (FA-PURCHASING/DISBURS SERV); (0.00 - 74,999.99) USD	462
1192820	2014-08-08 ufrequestor 03	Dept Id: 64400000 (FA-PURCHASING/DISBURS SERV); (0.00 - 74,999.99) USD	462
1095749	2014-02-17 ufshopper 01	2 Folders	388
1242470	2014-11-03 ufrequestor 01	Dept Id: 64400000 (FA-PURCHASING/DISBURS SERV); (0.00 - 74,999.99) USD	374

1-5 of 12 Results Per Page 5

Document Search

Search Purchase Orders Document Numbers, Supplier, Product Inf

Shortcuts: My Requisitions My Purchase Orders My Forms

Approvals: My Approvals Approval Notifications My Recent Approvals

Quick Links to Websites

- Instruction Guide for Approvers
- ChartFields Reference by Gen Acctg
- myUF Market Instruction Guides
- UF Purchasing Website
- UF Purchasing FAQs

Action Items

My Assigned Approvals

Requisitions To Approve 1

Unassigned Approvals

Requisitions 7

Step 3 – Using the My Approvals panel

The My Approvals panel offers different ways to sort and view your requisitions. You may click on the column headings to sort by Requisition Number, Name or Days in Folder. You may also check the Only Display My Approvals to view requisitions you have assigned to yourself. Click on the requisition number to view the requisition.

Dashboard for Approvers			
My Approvals ↻ ?			
View:	Requisition	<input checked="" type="checkbox"/> Only display My Approvals	
Number ▲	Name ▲	Folder Name	Days In Folder ▼
1449439	2015-10-27 ufrequestor 01	2 Folders	15

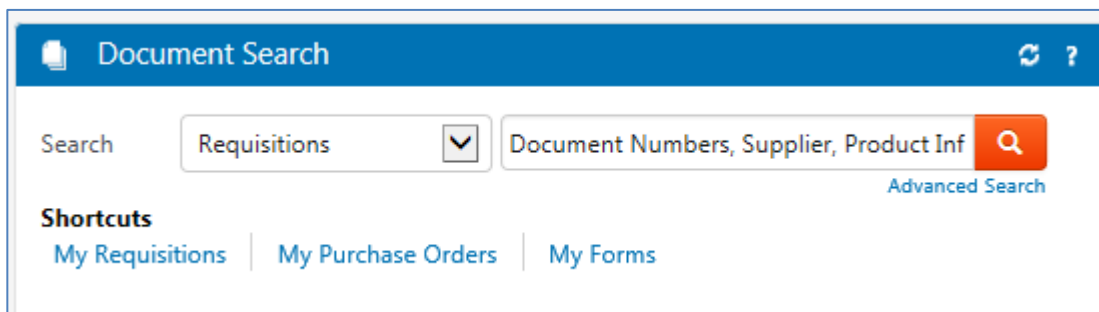
Step 4 – Using the Action Items panel

This panel shows you quickly how many requisitions you may have awaiting approval. Click on the Requisitions link to view a list.

Action Items ↻ ?	
▼ My Assigned Approvals	
Requisitions To Approve	1
▼ Unassigned Approvals	
Requisitions	7

Step 4 – Use the Document Search to Find Requisitions or Purchase Orders

You may use the **Document Search** panel to search for a Requisition, Purchase order or Form request by number. You may click Advanced Search to search by more terms. Please refer to the instruction guide, [Using the Search Export to Research POs and Requisitions](#) to use the Advanced Search.

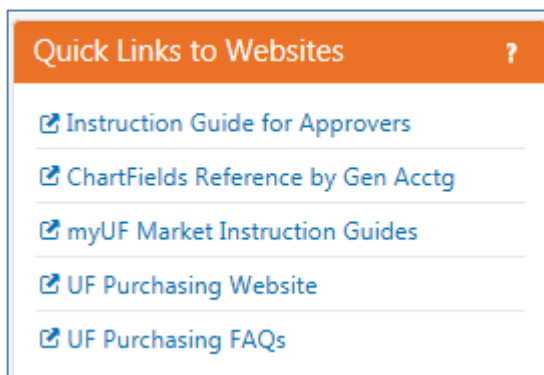


The screenshot shows the 'Document Search' panel. It has a blue header with a document icon, the title 'Document Search', and refresh and help icons. Below the header, there is a search bar with a dropdown menu currently set to 'Requisitions'. To the right of the dropdown is a text input field containing 'Document Numbers, Supplier, Product Inf' and a red search button with a magnifying glass icon. Below the search bar, there is a section titled 'Shortcuts' with three links: 'My Requisitions', 'My Purchase Orders', and 'My Forms'. A link for 'Advanced Search' is also visible below the search bar.

Step 5 – Use the Quick Links to UF Websites

The **Quick Links** panel provides shortcuts to recommended references online such as:

- Instruction Guide for Approvers
- ChartFields Reference by Gen Acctg
- myUF Marketplace Instruction Guides
- UF Procurement Website
- UF Procurement FAQs



These links are updated by UF Procurement as needed or by time of year necessity, such as End of Fiscal Year.

For additional help, please contact the Procurement Help Desk at 352 392-1335.