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

<u>Overview</u>

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:

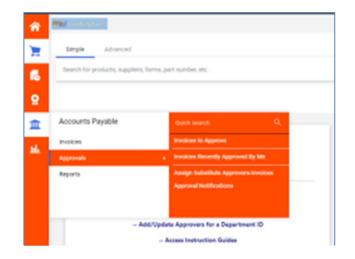
	All - Search (Alt+Q) Q 4.00 USD 🗮	♡ № 🔺 1
	Action Items	
Go to: Non-Catalog Item Favorites For	My Assigned Approvals	tracts
	Carts Assigned To Me	3 Q
	Requisitions To Approve	•
	Invoices	
	Change Request	7
	Unassigned Approvals	~
	Requisitions	<u> </u>
Agreement Intake Form for Amount O	Invoices	13
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 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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5	Sample Advanced			
16	(inders	Quick search	۹.	
Q	Search	Requisitions to Ap	prove	
	My Orders	Change Requests	to Approve	
血	Approvals		ntly Approved By Me	1.1
-		Assign Substitute Approval Notifical	Approvers Hequisitions ions	Forms
				Service
		I Want Tour		
		- Add/Update My PCard In	formation	Lab Supp



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:

			All 👻	Search (Alt+Q)	👻 🗢	1 ²⁰
					Older Entry Date N	lewest First 💌
					View Details Group Results by Folders	
Showing 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	Ľ 1.
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	C 1.

mylf marketplace

3. Use the dropdown to sort:

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		ы 0 <u>.</u>
multimarketplace	Requisitions Search (Alt+Q)	
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Requisitions Purchase Order Change Requests	Involces	Requisition Number Descending
	∠ Total Results 13 Display 20 per tolder ▼	Requisition Number Ascending
Your Selections	Total Results 13 Display 20 per folder	Submit date newest first
	> MY PR APPROVALS 3	Submit date oldest first
Date Range		Folder Entry date newest first
All Dates 👻	> DEPT ID: 21030000 (CFO-PURCHASING SERVICES): (0.00 - 74,999.99) USD 🔕	Folder Entry date oldest first
		Total high to low
Filters	> DEPT ID: 63300500 (FS-FIN BUSINESS OFC): (0.00 - 74,999.99) USD 1	Total low to high
	> DEPT ID: 64400000 (FA-PURCHASING/DISBURS SERVS): (0.00 - 74,999.99) USD 🥝	
Huron Consulting Group Inc 3	> DEPT ID: 85000000 (FL POLYTECHNIC UNIVERSITY): (0.00 - 74,999.99) USD 1	
Affiliated Engineers SE Inc 2	> FINANCIALCATCH-ALL 1	
Bio-Rad Laboratories Inc 2		
NGI Capital Inc 2	> PROF SVCS AND INDIV COMPENSATION 2	
UF-Facilities Services 2		
See all Supplier Select Multiple E		
↑ SUPPLIER CLASS		
Contract Supplier \$ 2		
FLPTU Vendor File P 2		
Enabled Vendors O 2		
UF ISP No Distribution 7 2		
Pcard Option 2 See all Supplier Class Select Multiple [2		
CURRENT WORKFLOW STEP		
Financial Approval 10 Buyer Sourcing 2		
Financial Catch-All 1		

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:

my af marketplace			
Approvals			
Requisitions Change Requests Invoices			
Your Selections	←	Showing Results 1 - 7 of 7	20 Per Page 🔻
Date Range		REQUISITION NO.	SUPPLIERS
All Dates	•	1655714	GovConnection Inc
Filters		2789166	Huron Consulting Group Inc

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:

					•	Folder Entry Date Ne	ewest First 💌
					View Det	ails	
					Group Re	sults by Folders	
fotal Results 7 Display 20 per fo	View Details Group Results by Folders Expand All Collapse All Collap						
					Collapse	All	
MY PR APPROVALS							
DEP1 ID: 63300500 (FS-FIN BUSI	NESS OFC): (0.00 - 74,999.99) USD	D					
REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	A	MOUNT	
311222	UF-Facilities Services	Not Assigned	3/28/2014 11:09 AM	Elizabeth Farmer	50	.00 USD	Cî 4
DEPT ID: 64400000 (FA-PURCHA	SING/DISBURS SERVS): (0.00 - 74,999	.99) USD 2					
DEPT ID: 85000000 (FL POLYTEC	HNIC UNIVERSITY): (0.00 - 74,999.99)	USD 1					
FINANCIALCATCH-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:**

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mylif marketplace					Al -	Search (Alt+Q)	4.00 USD 👻	∞ 🔊 🛊
Approvals							Folder Entry	Date Newest First 💌
Requisitions Change Requests Invo	pices							
Your Selections	←	Total Results 7 Display 20 p	er folder 👻					
Date Range		> MY PR APPROVALS						
All Dates		✓ DEPT ID: 63300500 (FS-FIN E	BUSINESS OFC): (0.00 - 74,999.99) USD 🕚					
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SUPPLIER GovConnection Inc	2	- DEPT ID: 64400000 (FA-PUR	CHASING/DISBURS SERVS): (0.00 - 74,999.99	i) USD <				
Huron Consulting Group Inc Bio-Rad Laboratories Inc	2	REQUINTION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	
Cheney Brothers Inc	1	16557	GovConnection Inc	Gator Approver	9/6/2016 1:22 PM	Gator Requestor	2,862.39 USD	Ľ.
UF-Facilities Services See all Supplier Select Multiple E	1	11928	Bio-Rad Laboratories Inc 🧿 🛉 🍒	Not Assigned	8/8/2014 8:56 AM	Gator Requestor	128.34 USD	0 C.
	рт	DEPT ID OT SOODO (FL POLY	TECHNIC UNIVERSITY): (0.00 - 74,999.99) U	SD 🕦				
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Sourcing Limit Review	• 1	> PROF SVCS AND INDIV COM	PENSATION 2	Select an action				
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				Finalize Step				
Financial Approval	4			Forward				
Buyer Sourcing	2			Return to Shared Folde	r			
Financial Catch-All Select Multiple F	1	ITEMS SELECTED	8	Place PR On Hold				(
Sereta Millione Li								1

For Invoices:

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All Dates	•	INVOICE	SUPPLIER INVOICE NO.	SUPPLIER NAME	ASSIGNED	CREATE DATE	PO NO.	MATCH STATUS	AMOUNT		
View Approvals For My Approvals	- ſ	V0 11920	IN996805-MX0145820	Zeno Office Solutions Inc	Not Assigned	8/5/2021 4:09 PM		Do Not Match	37.67 USD	0 C	
State • Not Assigned ×	-	Due Date Invoice Name		14/2021 21-08-05 dbrook 04		No. of Lines: Folders	1 98 Days in	folder [Dept Id: 6440	4000 (FA-DS-DISBURS		
Filters		Type Invoice Source: V0001863		n-PO Invoice anual Publix Super Markets Inc	Not Assigned	6/9/2021 1:39 PM		Do Not Match	10.00 USD	Ø [
SUPPLER Zeno Office Bolutions Inc Jasona Deli Parts Professional Inc Public Super Markets Inc	4 3 1	Due Date Invoice Name Type Invoice Source:	6/ 20 No	19/2021 21-06-09 (pearson 01 in-PO Invoice anual	Prot Assignme	No. of Lines: Folders	1 155 Days		04000 (FA-DS-DISBUR		
POSS LLC See all Supplier Select Multiple (5	0	V0001835	IN996805-MX0145879	Zeno Office Solutions I	Select an action			Do Not Match	37.67 USD	0 C	3 4
Contract Supplier Enabled Vendors	\$ 3 O 3	Due Date Invoice Name Type	20	19/2021 21-05-13 dbrook 03 xn-PO Invoice	Approve/Complete Forward		1 182 Days	in folder [Dept Id: 644	04000 (FA-DS-DISBUR	SEMENT SE	RVIC
Peard Option Select Multiple (5 CURRENT WORKFLOW STEP		Invoice Source:		anual	Return to Shared Folder Place Invoice On Hold Add Notes to History						
Department Approval 1	13										(

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.

Total Res	sults 7 Display 20 per fol	der 💌					
✓ MY P	R 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	
V DEPT	D: 63300500 (FS-FIN BUSIN	IESS 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	Ľ 🕹
✓ DEPT	D: 64400000 (FA-PURCHAS	SING/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	C 1.
\checkmark	1192820	Bio-Rad Laboratories Inc 🧿 🛉 👗	Not Assigned	8/8/2014 8:56 AM	Gator Requestor	128.34 USD	0 Ľ 1



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.

Summary PO Preview	v Comments Attachments His	tory						Return to Shared Folde
Cart Information		··· Ship To	ø	Bill To and PCard		ø v	Pending	Place on Hold Return to Requisitioner
Status	S Pending Financial Approval (Gator Approver)	Ship To		Bill To			A Be aware of these issues. You may review and proceed.	Forward to
Submitted	9/6/2016 1:22 PM	Attn: Marianne Preisler Building/Room: Licht Lab Room 280 E 2033 MOWRY RD		Attn: Gator Requestor PO BOX 100245 GAINESVILLE, FL 32610	-0245		Associated PO Clauses contains	
Cart Name	2016-09-06 ufrequestor 02	GAINESVILLE, FL 32610 United States		United States			Total (2,862.39 USD)	~
Description	no value						Subtotal	2,862.39
Priority	Normal	Delivery Options		PCard Information				2,862.39
Prepared by	Gator Requestor	Requested Delivery/Due no value		Cardholder Name	Unviersity of Florida			LIOULIOF
		Date		Card Number	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		What's next?	~
Purchasing Use Only				Card Security Code			Workflow	C 🖶

For Invoices:

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Invoice • V0001920 •			=		< 🕹 Assign 👻
Summary Matching Suppler Mess	ages Comments Attachments 🚺 History		: By clicking this button, you acknowledge rece : By clicking this button, you acknowledge rece		
	invoice lines. They are excluded from the matching.	Approve.	by clicking this button, you acknowledge rece	Zeno Office Solutions Inc	
1 General	··· Addresses	··· Note/Attachments	v	Supplier Invoice No. Invoice Image	IN996805-MX0145820
Invoice Type Invoice	Remit To	External Note	no value	Zeno.pdf	10.
Invoice Source Manual	PO Box 865120 Orlando, Florida 32886	External Attachments		Total (37.67 USD)	~

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

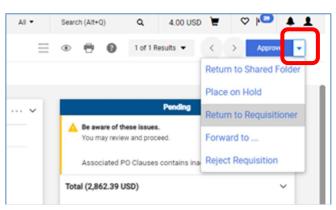
For Invoices:

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	Invoice • V000192	× .				=	•	0	1 of 13 Res	uits 🕶	<	> Assig	m 🔻
Ľ	Summary Matching	Assign											
ŀ		Approve: By clicking this button, y	ou acknowledge receipt of goods and services on be	half of UF (go to next invoice)									
	A The invoice contains on	Approve: By clicking this button, y	ou acknowledge receipt of goods and services on be	half of UF		,			•	ending			
I.	The second second	Mark as Dispute					Zeno 0	ffice Solu	utions Inc				~
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ł.	Invoice Type	Copy to new invoice			no value		Invoice Zeno						
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For Requisitions:

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	Requisition • 33748	3 🔹				≣ ⊛	🔁 🔕 1 of 7 Res	iuts 🕶 <	Assign To Myself
	Summary PO Preview	Assign to myself Approve & Next							
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	Cart Name Description	Continue Shopping View Carts	1255 LILA ST JACKSONVILLE, FL 32209 Jnited States		United States		What's next?		.,

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:



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

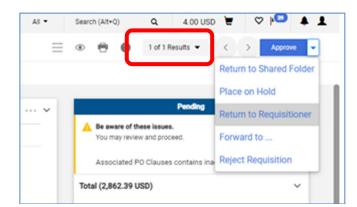
my uf marke	iplace	All 👻 S
Requi	sition • 1655714 -	-
Sumn	ary PO Preview Comments Attachments History	
-		
Rec	ords found: 0 Show comments for Requisition	+
No c	omments have been added	_

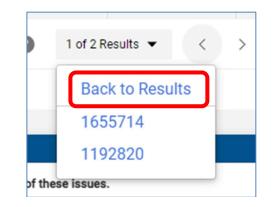
4. To send the comment, click the **green check** on the right:

Imary PO Preview Comments Attachments History	
ecords found: 0	Show comments for Requisition
ADD COMMENT	
Please send me any attachments needed. Thank you!	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) <pre>purchasing@ufl.edu></pre>
951 characters remaining expand 1 clear	Gator Requestor (Prepared by, Approved) <mpreisl@ufl.edu> Marianne Preisler (Approved) <mpreisl@ufl.edu> Attach file (optional) Attachment Type File File V Link/URL File V</mpreisl@ufl.edu></mpreisl@ufl.edu>
	File Choose File Upload your file



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 <u>myufmarketplace@ufl.edu</u>or call the myUF Marketplace HelpDesk at 392-1335.