

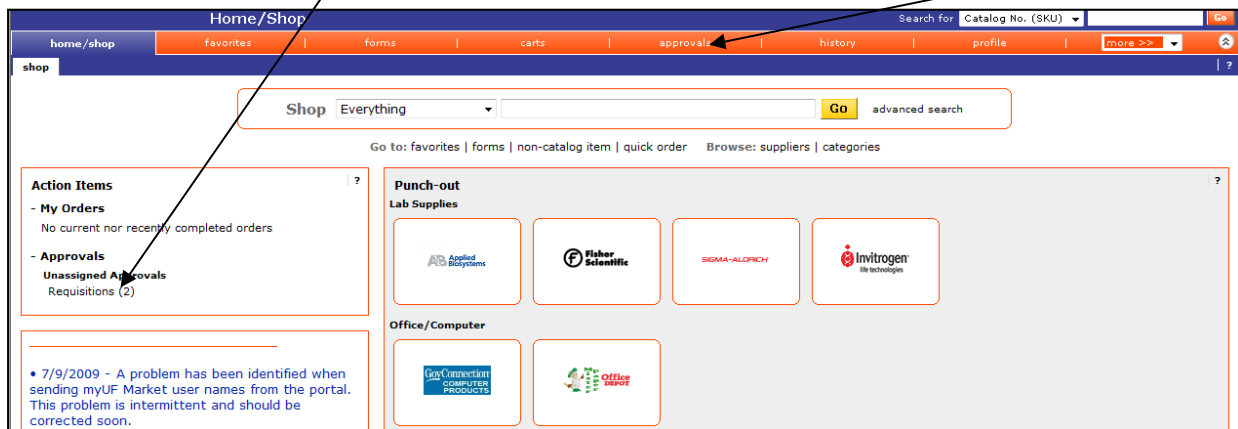
# [Approving Requisitions in myUF Market]

Use this instruction guide to approve a purchasing requisition (PR) in myUF Market. Approvers in myUF Market can approve, modify, add notes, or deny (reject) a purchasing requisition. Denying a requisition must be done line by line. **Approvers may now also return a requisition. Please refer to the new instruction guide, "Returning Requisitions for Approvers."**

This instruction guide is for those who have Financial Approver security in myUF Market 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. To navigate, log in to myUFL and then click on **eProcurement > myUF Market** to process the approval in the myUF Market.

Note: Hyperlinks in myUF Market are not underlined until you mouse over the words.

- ▶ Log in to **my.ufl.edu** using your GatorLink username and password
- ▶ Click on **eProcurement > myUF Market**
  - ▶ Refer to the **Action Items** panel on the left for a quick access to requisitions waiting for approval
    - Click the **Approvals** link
    - If there are requisitions awaiting approval, the word **Requisitions** will display with a number beside it in parentheses under **Unassigned Approvals**
    - Click **Requisitions** to go to your Approvals page or click the **Approvals** link at the top



- ▶ In the section, Requisition Approvals, there are two or more folders:
  - ▶ **My PR Approvals**
    - These are requisitions assigned to yourself
    - The system displays how many requisitions are pending approval and how many are active
  - ▶ **Dept ID / Amount with an assigned Dept ID and Cost Center**
    - These are requisitions submitted to workflow that need approval for this Dept ID / Amount
    - The system displays how many are not assigned to an approver, and how many are pending



Updated July 20, 2009 for myUF Market 9.2 Upgrade

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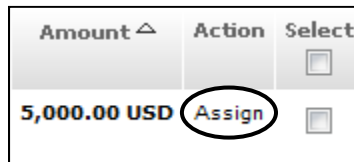
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# [Approving Requisitions in myUF Market]

- ▶ If you have requisitions ready for approval, you will see folders on the **Approvals** page
  - ▶ The top one is the **My Approvals** folder
  - ▶ Any folders displaying after that will the **Dept ID and Amount** folders assigned to you
  - ▶ You may sort by clicking the column headings for easier viewing

To assign a requisition to your own approvals folder:

- ▶ First **assign it** to your **My Approvals** folder by:
  - ▶ Clicking the word **Assign** on the right side of the requisition's row, next to the checkbox
  - ▶ The system will put a copy of the requisition in your folder



- ▶ If you would like to assign all, check the **Select** checkbox in the gray header at the top
  - ▶ Use the dropdown at the top and select "Assign," then click the **GO** button
  - ▶ The system will give each requisition in your folder the status of "Active"
  - ▶ In the Dept ID / Amount folders, it will add your name to the requisition as its Approver with a status of "Assigned"

home | my favorites | product search | carts | **approvals** | history | profile | more >>

requisition | Requisition outlook

+ Click to filter requisitions

Hide requisition details

Assign Substitute Apply Action to Selected PR(s) Finalize Step Go

**- My PR Approvals**

Results per page 10 Requisitions Found: 1 Page 1 of 1

Requisition No. ▼	State ^	Priority ^	PR Date/Time ^	Requisitioner ^	Amount ^	Action	Select
262075 view	Active	Normal	1/22/2009 7:27 PM	Joe Green	2,854.47 USD	Approve	<input type="checkbox"/>

Cart Name: 2009-01-22 mprequestor 01 Suppliers: Fisher Scientific  
Cart Description: Fisher Scientific  
No. of line items: 2

Assign Substitute Apply Action to Selected PR(s) Assign Go

**- Dept Id: 62010000 (HR-HR ADMINISTRATION): (0.00 - 75,000.00) USD**

Results per page 10 Requisitions Found: 1 Page 1 of 1

Requisition No. ▼	Approver ^	State ^	Priority ^	PR Date/Time ^	Requisitioner ^	Amount ^	Action	Select
262075 view	Marianne Preisler	Assigned	Normal	1/22/2009 7:27 PM	Joe Green	2,854.47 USD		<input type="checkbox"/>

Cart Name: 2009-01-22 mprequestor 01 Suppliers: Fisher Scientific  
Cart Description: Fisher Scientific  
No. of line items: 2

To review a requisition:

- ▶ To view the entire requisition, click the **requisition number** on the left-hand side of the requisition, or the **View** link next to the number
  - ▶ Check the requisition line-by-line, and verify:
    - Items being purchased
    - Shipping and Billing
    - PO Business Unit and ChartFields
    - Commodity Code
    - Internal Notes (these go to approvers)
    - External Notes (these go to the vendor)
    - Total Amount of Requisition

# [Approving Requisitions in myUF Market]

- ▶ To **approve** the requisition,
  - ▶ Check the checkbox on the right-hand side of the requisition
    - Click the word “Approve” next to it to approve, or
  - ▶ Click the **Requisition** number, or the **View** link next to the number
    - At the **dropdown** at the top, select “Finalize Step” and click **GO**
  
- ▶ To **return** the requisition to the requestor,
  - ▶ Click the **Requisition number** to view the requisition or click **View**
  - ▶ At the dropdown at the top, select “Return to Requisitioner” and click **GO**
    - The requisition will be returned as a **Draft Cart** and may be edited and resubmitted
  - ▶ Please refer to the [new](#) instruction guide, “Returning Requisitions in myUF Market” for more details
  
- ▶ To **deny or reject** the requisition,
  - ▶ Click the **Requisition number** to view the requisition or click **View**
  - ▶ This must be done at the [line level within the requisition](#)
    - ▶ Scroll down to view the lines of the requisition
    - ▶ Check the checkbox [of the line](#) on the right-hand side
    - ▶ Select **“Reject Selected Items”** from the dropdown at the line level section
    - ▶ Click the **Go** button
      - The requestor will have to copy the rejected requisition to a **new** draft cart to edit
      - A box appears titled **Add Note** for “Reject Line Reason” - add a note with a reason
      - Click the **Reject Line Item** button
      - If you change your mind, you can select “Un-reject Selected Items” from the dropdown
    - ▶ Scroll to the top of the requisition
    - ▶ Select **“Finalize Step”** from the dropdown at the top
    - ▶ Click the **Go** button
  
- ▶ To find an approved requisition [after you have taken action on it](#),
  - ▶ Click the **Requisition Outbox** link on the top blue menu band under the orange band
  - ▶ For denied or rejected requisitions,
    - It will display a row for your requisition and show a check mark with an “x” in it
    - For multiple-line requisitions with some lines denied, the row will display “Requisition Line Item Rejected”
      - A separate row will show the requisition as “Approved” with a check mark with an “x” in it
    - To approve requisitions line by line, please use the instruction guide, “Approving Requisitions with Multiple Dept IDs”

For further assistance, please e-mail [myufmarket@ufl.edu](mailto:myufmarket@ufl.edu) or call Purchasing Services at 392-1331 or visit <http://www.purchasing.ufl.edu/myufmarket>.