

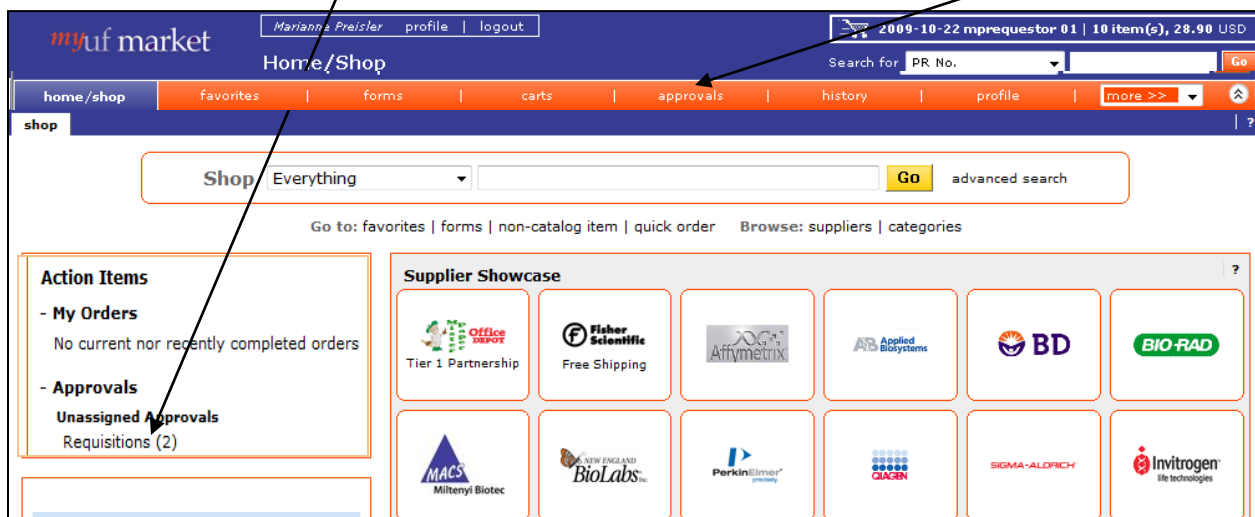
[Approving Requisitions in myUF Market]

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 return a requisition. Please refer to the 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. E-mail reminders will be sent out automatically by the system for requisitions not approved.

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

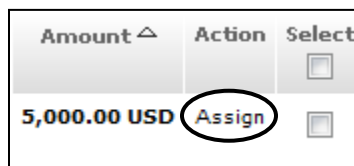


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- ▶ If you have requisitions ready for approval, you will see folders on the **Approvals** page
 - ▶ The top one is the **My Approvals** folder
 - ▶ Any folders displaying after that will be the **Dept ID and Amount** folders assigned to you
 - ▶ You may sort by clicking the column headings for easier viewing
- ▶ You may also sign up for e-mail notifications for when a requisition is ready for your approval
 - ▶ At the very top of the myUF Market website, click **Profile > Email Preferences**
 - Check the box for "PR pending workflow approval"
 - The e-mail will include items such as Summary, Details and ChartFields
 - Note: You cannot approve from the e-mail itself

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

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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

- ▶ 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 or call Purchasing Services at 392-1331 or visit <http://purchasing.ufl.edu/departments/myufmarket/default.asp>