

[Completing a Requisition in myUF Market]

Use this instruction guide to complete a requisition in myUF Market with information such as Shipping, Billing, PO Business Unit and ChartFields. Additional information such as Delivery Information and Distribute By as well as selecting PCard as a payment option (if available) may be added. If processing a form or non-catalog item, additional information will be needed such as vendor, unit price and commodity code. Internal and External Notes and attachments can be added. When completed, the requestor clicks the Place Order link in the cart path diagram at the top. This instruction guide is for Requestors who have the role UF_N_MKT_REQUESTOR. Shoppers may complete a requisition with this information but must assign it to a requestor to place the order.

- ▶ Access myUF Market by navigating to <http://my.ufl.edu> and logging in with your Gatorlink username and password, and navigate to:
 - ▶ **My Self Service > myUF Market** for UF_N_MKT_Shopper role
 - ▶ **eProcurement > myUF Market** for UF_N_MKT_Shopper_Req role (to shop only)
UF_N_MKT_Requestor and UF_N_MKT_Financial Approver

To view your current carts:

- ▶ To view all your carts, including assigned carts,
 - ▶ Navigate to **Carts > Draft Carts**
 - ▶ Click on a cart number to view the cart and begin to process as a requisition
 - Make sure the cart contains a **Cart Name** in the top-left corner that will be easy to use for finding the requisition in the future

To process as a requisition:

- ▶ To process a cart as a requisition, click the **Review** link at the top cart path diagram
 - ▶ The cart will display several sections with the **Edit** button on the right of each section
 - ▶ To edit each section, click its own **Edit** button
 - ▶ Some sections may already be completed if there were default values in the shoppers' User Profile. Refer to the instruction guide, "Setting Up Your User Profile."

Initiator: Shipping address
Initiator: Billing address

This is a partial list of errors. Click here to see all (8)

Info

Hide value descriptions

Shipping	Billing
Ship To edit <i>no address</i> ✘ To be filled out by Req. Initiator	Bill To edit <i>no address</i> ✘ To be filled out by Req. Initiator
Delivery Options edit Requested Delivery <i>no value</i> View/edit by line item...	PCard Information edit Cardholder Name mprequester Card Number XXXXXXXXXXXX1111 Card Security Code Expiration Date 10/2010



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Ship To:

- ▶ To complete the **Ship To** information
 - ▶ Click the **Edit** button inside the Shipping box
 - ▶ Click the **from org addresses** link to search for shipping addresses at UF
 - ▶ Enter a building name in the **Nick Name** box or enter a street address in the **Address Text** box
 - Click the **Search** button
 - ▶ Click the **Select** button to the right of the needed address to add to requisition
 - Add the **Attn To:** name and the **Room/Area** number
 - Click the **Add to Profile** checkbox if you would like to save this in a dropdown for future selection and use
 - Click the **Save** button

Delivery Options:

- ▶ Enter the **Due Date** for the requisition here if needed
- ▶ Click the **Edit** button
 - ▶ Enter the date of **Requested Delivery** and click the Save button

Bill To:

- ▶ To complete the **Bill To** information
 - ▶ Click the **Edit** button inside the Billing box
 - ▶ Click the **from org addresses** link to search for Billing PO Box or Site at UF
 - Enter a Department name in the **Nick Name** box or a Street Address, City or PO Box in the **Address Text** box
 - Click the **Search** button
 - ▶ Click the **Select** button to the right of the needed PO Box to add to the requisition
 - Add the **Attn:** name
 - Click the **Add to Profile** checkbox if you would like to save this in a dropdown for future selection and use
 - Click the **Save** button

PCard Information:

- ▶ Click the **Edit** button to assign or unassign a PCard as payment method for this requisition
- ▶ If a user needs a PCard activated in the system, they need to sign-in at least once, then complete the myUF Market PCard Access Form at http://purchasing.ufl.edu/main_purchasingcards.asp to have it added to the system
- ▶ Refer to the instruction guide, "Using PCards in myUF Market" at <http://purchasing.ufl.edu/myufmarket/resources.htm>
 - ▶ If the vendor does not accept PCard, the option to assign a PCard will not be available

Other Information – Distribute By:

- ▶ Use this option if you need to pay the PO over time over several invoices, such as with a Standard Service Requisition
 - ▶ Click the **Edit** button
 - ▶ Select from the **Distribute By** dropdown to distribute by **Amount** or by **Quantity**

PO Business Unit:

- ▶ Click the **Edit** button to enter a PO Business Unit
 - ▶ This will be the first four digits of your Dept ID
 - ▶ You will be able to find the PO in myUFL by searching for it with this PO Business Unit

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Chart of Account Fields:

- ▶ Click the **Edit** button to enter or modify any of the ChartFields needed for this requisition
 - ▶ If paying with a Project ID, enter the Activity ID as 1 and the PC Business Unit as GRANT, otherwise, leave these fields blank
 - ▶ ChartFields are the same as in myUFL; scroll to the right to view them all
 - ▶ For creating split distributions, see the instruction guide, "Processing a Split Distribution in myUF Market"
 - ▶ Enter Dept ID, Fund Code, Program Code and Account Code, or click the **Select From All Values** link to search for each of these
 - If they are part of the Shopper or Requestor or Approver's **User Profile**, if they are marked as Default they will autopopulate the field, otherwise, click the dropdown, **Select From Profile Values**, for each of these to select and add to the requisition
 - ▶ Enter any additional ChartFields needed such as Source of Funds or Flex

Internal Notes and Attachments:

- ▶ Click the **Edit** button to add an internal note which will be seen by approvers who may include your department financial approver, a commodity approver or Purchasing Services
 - ▶ Click the **Attachments** link to upload an attachment

External Notes and Attachments:

- ▶ Click the **Edit** button to add an external note which will go to the vendor
 - ▶ Click the **Attachments** link to upload an attachment for the vendor

Commodity Code:

- ▶ The Commodity Code will be provided automatically by hosted vendors and punchout vendors. For Forms and Non-Catalog Item forms, search for the correct Commodity Code on the form by clicking the **search...** link next to the Commodity Code
 - ▶ Some forms include Commodity Code instructions in the instructions – please read!
 - ▶ Use the instruction guide, "Searching for Commodity Codes" to help with selection

Placing the Order:

- ▶ To place the order, check to make sure there are no yellow error boxes left at the top
 - ▶ Click the **Place Order** link in the clickable cart path diagram at the top
 - ▶ At the confirmation page, record the requisition number for reference

For additional help e-mail myufmarket@ufl.edu or call Purchasing Services at 392-1331 or visit <http://www.purchasing.ufl.edu/myufmarket>