

[Completing a Requisition in myUF Market]

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. Use this instruction guide to complete a requisition in myUF Market either after filling the cart yourself or having it assigned to you by a Shopper. Click the **Proceed to Checkout** button on the top right corner of the cart to complete required information such as Shipping, Billing, PO Business Unit and ChartFields.

Additional information such as selecting PCard as a payment option (if available) and Distribute By options may be selected as well. If processing a form or non-catalog item, a Commodity Code will be needed. Internal Notes and External Notes may also be completed as well as attachments. When completed, the requestor may place the order using the **Place Order** button at the top. This button remains grayed out until the requisition is complete and ready for ordering.

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

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
 1. 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
 2. Return the cart to the Shopper if needed, with an explanation, by clicking the **Return Cart** button next to the name of the cart.

To process as a requisition:

- ▶ To process a cart as a requisition, click the **Proceed to Checkout** button at the top

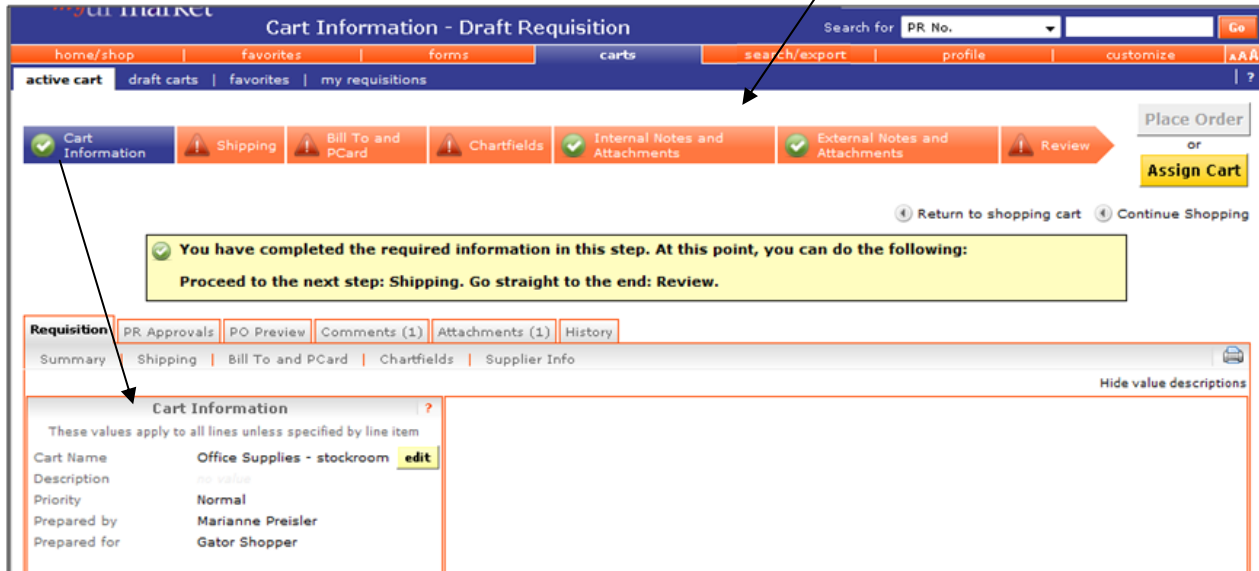
The screenshot shows a web browser window displaying a shopping cart. The title bar reads "Cart - 352055 - Draft Requisition". The page has a blue header with navigation tabs: "home/shop", "favorites", "forms", "carts", "search/export", "profile", and "customize". Below the header, there are links for "active cart", "draft carts", "favorites", and "my requisitions". The main content area shows a "Shopping Cart" with a "Return Cart" button. A search bar contains the text "lab supplies for Robertson". To the right, it says "14 Item(s) for a total of 139.86 USD" and has "Proceed to Checkout" and "Assign Cart" buttons. Below this, there are buttons for "Update", "Help", "Add Non-Catalog Item", and "Empty Cart". A section for "Fisher Scientific Co LLC T" is visible, with a "more info..." link. The main table lists the item "Syringe Slip Luer Tip Non-Sterile 10 CC, 850/CS" with a unit price of 9.99 USD, a quantity of 14, and a total of 139.86 USD. The table also shows the part number 14823168 and manufacturer info 301030 - (Bd Vacutainer Labware Medical). There are buttons for "Add to Favorites", "Remove", and "More Actions" for the item.



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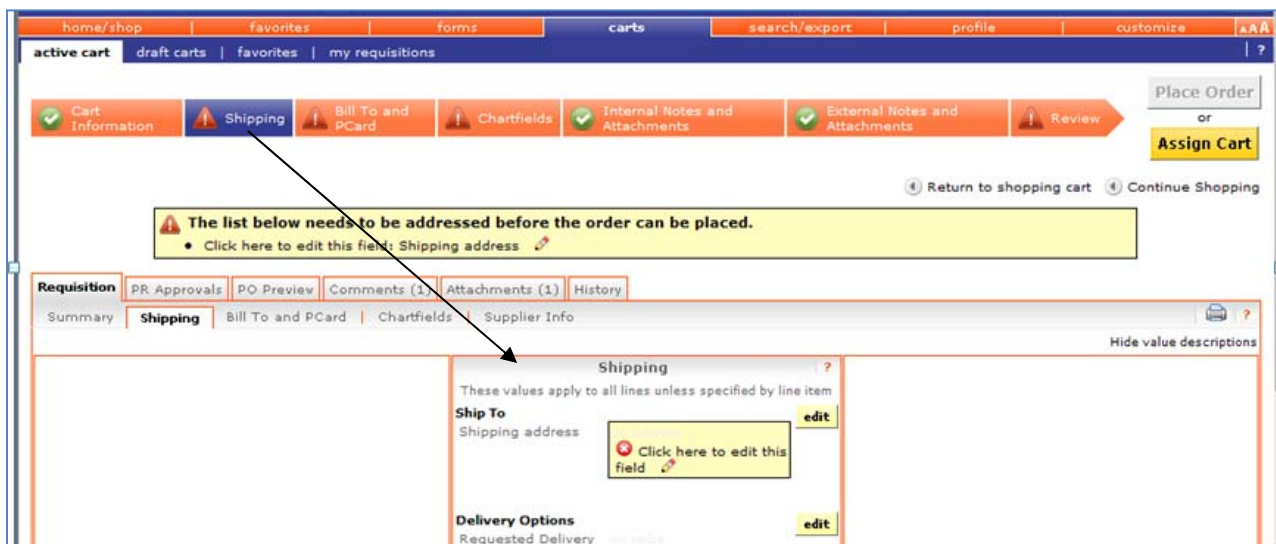
- ▶ The system will display the requisition for each step in the **Guided Checkout** at the top – the dark, highlighted step is what is currently on the screen ready for editing
 1. Some steps may be completed with default values from the User Profile. Please use the instruction guide, “Setting Up Your User Profile.”
 2. A green checkmark means complete; a red triangle needs attention. Keep in mind that defaulted information may still require review even though the step indicates it is complete.
 3. Click the **Review** step at the end to view the entire requisition at once.
 4. Not all steps will be required for all requisitions.



Shipping:

Ship To:

- ▶ To complete the **Ship To** information
 - ▶ Click wherever there is a pencil icon or click the **Edit** button to edit



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- ▶ myUF Market displays three sections for shipping addresses:
 1. Edit the existing address in the requisition
 - Add the **Attn To:** name and the **Room/Area** number
 - Click the **Save this address for future use** checkbox if you would like to save this in your profile for future selection and use
 - Click the checkbox to make this the **default address** in the future
 - Click the **Use** button to use
 2. Select from displayed address which one to use – these are from your User Profile
 3. Search campus-wide for the address you need
 - 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 **Use** button to the right of the needed address to add to requisition

When the changes are complete, the screen will display a checkbox next to Shipping. Click the next step to proceed or click **Review** at the end to edit the entire requisition.

Cart Information Shipping Bill To and PCard Chartfields Internal Notes and Attachments External Notes and Attachments Review Place Order or Assign Cart

Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Bill To and PCard. Go straight to the end: Review.

Requisition PR Approvals PO Preview Comments (1) Attachments (1) History

Summary Shipping Bill To and PCard Chartfields Supplier Info

Shipping ?

These values apply to all lines unless specified by line item

Ship To edit

Shipping address Attn: Marianne Preisler Building/Room: Room

Bill To and PCard:

Bill To:

- ▶ To complete the **Bill To** information
 - ▶ Click the **Edit** button inside the Billing box
 - ▶ Follow the same instructions for selecting a shipping address keeping in mind:
 1. Billing addresses are not tied to PO Business Units

PCard Information:

- ▶ Click the **Edit** button to assign or unassign a PCard as payment method for the requisition as appropriate for the PCard policy and the cardholders individual limit
- ▶ 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 <https://www.fa.ufl.edu/apps/purchasing/market/> to have it added to the system
- ▶ Use the instruction guide, "Using PCards in myUF Market" at <http://purchasing.ufl.edu/departments/myufmarket/resources.asp>
 - ▶ **If the vendor does not accept PCard, the option to assign a PCard will not be available**

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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**

ChartFields:

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

ChartFields:

- ▶ 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
 1. 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
 - ▶ You may now also set up **ChartField String Favorites** in your **User Profile**! Save a ChartField string and add the string automatically to the requisition later, or save several, and select one within the requisition to instantly populate the ChartFields. To learn how to do this, view the “Using ChartField String Favorites” simulation and PDF instruction guide

Internal Notes and Attachments:

- ▶ Click the **Edit** button to add an internal note which will go to your department financial approver and to the Purchasing Services Department if the requisition is routed that way
 - ▶ 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
 - ▶ To see if an enabled vendor reads External Notes or attachments review the myUF Market Enabled Vendor Reference Tool on this page
<http://purchasing.ufl.edu/departments/myufmarket/vendors.asp>

Review:

Commodity Code:

- ▶ The Commodity Code will be provided automatically by hosted vendors and punchout vendors. For Forms and Non-Catalog Item forms, click the **Edit** button at the line level to search for the correct Commodity Code on the form by clicking the **search...** link next to the Commodity Code

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- ▶ 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, all the steps in the orange arrow should have green checks for the Place Order button to become active
- ▶ Click the **Place Order** button to place the order

The screenshot shows the 'Summary - Draft Requisition' page in the myUF Market system. At the top, there is a navigation bar with links like 'home/shop', 'favorites', 'forms', 'carts', 'search/export', 'profile', and 'customize'. Below this is a search bar for 'PR No.' and a 'Go' button. A progress bar at the top indicates that all steps (Cart Information, Shipping, Bill To and PCard, Chartfields, Internal Notes and Attachments, External Notes and Attachments, and Review) are complete, each with a green checkmark. The 'Place Order' button is highlighted with an orange circle. Below the progress bar, there is a yellow message box with a green checkmark icon that reads: 'All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.' The main content area is divided into several sections: 'Requisition' (with sub-tabs for PR Approvals, PO Preview, Comments (1), Attachments (1), and History), 'Summary' (with sub-tabs for Shipping, Bill To and PCard, Chartfields, and Supplier Info), and 'Hide header'. The 'Summary' section is further divided into three columns: 'Cart Information', 'Shipping', and 'Bill To and PCard'. Each column contains various fields with 'edit' buttons. The 'Cart Information' section includes fields for Cart Name, Description, Priority, Prepared by, and Prepared for. The 'Shipping' section includes fields for Ship To (Attn: Marianne Preisler, Building/Room: Room 202, 903 WEST UNIVERSITY, GAINESVILLE, FL 32602, United States) and Delivery Options. The 'Bill To and PCard' section includes fields for Bill To (Attn: Dr. Henri, PO BOX 116005, GAINESVILLE, FL 32611, United States) and PCard Information (NO PCARD HAS BEEN ASSIGNED TO THIS TRANSACTION. CLICK THE EDIT BUTTON TO ASSIGN YOUR PCARD.).

For additional help, e-mail myufmarket@ufl.edu or call Purchasing Services at 392-1331.