

[Finding Purchases and Requisitions Using Queries]

Use this instruction guide to check the status of your purchase orders and requisitions in myUF Market including orders you have placed on behalf of a shopper, which you cannot view in the My Requisitions page unless you use a query – please refer to the “Using My Requisitions Page in myUF Market.” If you are a shopper and you assigned your cart to a requestor, you may sign up for e-mail notifications to be alerted as to when the PO is dispatched to the vendor. Refer to the instruction guide, “Setting Up User Profiles.” Anyone who uses myUF Market may use this page.

- ▶ Access myUF Market by navigating to <http://my.ufl.edu> and logging in with your Gatorlink username and password, and navigate to:
 - ▶ **Click My Self Service > Click myUF Market** for UF_N_MKT_Shopper role
 - ▶ **Click eProcurement > Click myUF Market** for UF_N_MKT_Shopper_Req role (to shop only) UF_N_MKT_Requestor and UF_N_MKT_Financial Approver
- ▶ Click the **History** link on the top menu, then select
 - ▶ PR History to search for requisitions
 - ▶ PO History to search for purchase orders

Searching for Requisitions – Use the **PR History** tab for Purchasing Requisitions

- ▶ You can search **by PO** or **by Requisition (PR)** by clicking on either tab
- ▶ If you know your requisition number, enter it at the **Requisition Number** field
- ▶ You may also search by Supplier, Catalog Number (SKU)
- ▶ Check the **Filter** box to use the Filters in the next section of the page:
 - ▶ Modify the **Start Date and End Date** to have a date range – 90 days maximum

Examples of Queries:

- ▶ To search for requisitions you shopped:
 - Click the **My Orders** option button
 - At **Prepared By** click the Select User button
 - Search for your name and click the **Choose the Selected User** button to add
- ▶ To search for requisitions placed for a certain shopper or for orders you a shopper assigned to a requestor:
 - Click the **My Submitted Orders** button
 - At **Prepared For** click the **Select User** button
 - Search for the name of the shopper and click **Choose the Selected User**
- ▶ To search for both orders placed by you AND orders placed for other shoppers assigned to you
 - Click the **My Submitted Orders** button
 - Do not select a specific User
- ▶ You may include any status of the PR by clicking on it on the left box and using the arrows to move to the box on the right or click the **Show All** to include all statuses
- ▶ Click the **Search** button
- ▶ You may now also search by Custom Values, such as:
 - ▶ Dept ID, Fund Code, etc.
 - ▶ PO Business Unit

Searching for Purchase Orders – Use the **PO History** tab

- ▶ You can search **by PO, by Requisition or by Supplier/SKU** by clicking on these tabs
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- ▶ Searching **by PO**:
 - ▶ If you know your **PO** number, enter it at the **Purchase Order No.** field
 - ▶ Check the **Filter** box to use the purchase order filters offered in the bottom half of the page and search by purchase order attributes, such as:
 - ▶ Sent to Supplier
 - ▶ Partially shipped
 - ▶ PO Status, such as:
 - No Shipments
 - With Cancellation
 - ▶ You may now also search using **Custom Values**, which include some ChartField values and the PO Business Unit
 - ▶ Click the **Search** button

The screenshot displays the 'myUF Market' interface for searching purchase requisitions. It includes search criteria for 'Start Date' (07/01/2009) and 'End Date' (07/21/2009), both with calendar icons. Below these are 'Prepared for' and 'Prepared by' fields, each with a 'Select User' button. A 'Custom Field Filter' section contains various fields like 'Budget Reference', 'CRIS', 'Dept Flex', 'Dept Id', 'Fund', 'PO Business Unit', 'Program Code', 'Project', 'Source of Funds', and 'UFID', each with a dropdown menu and options like 'Select from profile values...' and 'Select from all values...'. At the bottom, there are 'PR Status Filters' with two sections: 'Include PR's with Any of These Statuses' and 'Only Include PR's with These Statuses', each containing a 'PR Status' dropdown and a 'Show All' button. The interface concludes with 'Search' and 'Request Export' buttons.

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Exporting the Results to Excel

- ▶ Click the **Request Export** button at the bottom to export the result set to Excel

Request Export ?

File Name

Description

expand | clear

Export Type

Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

- ▶ The excel file will contain:
 - Status
 - PO#
 - Supplier Name
 - Creation Date
 - PO Total Amount
 - Requisitioner ID and Name
 - PO Status (Supplier Status)
- ▶ Navigate to **History > Search Exports** to get the file
 - Click the name of the file on the left under the **File Name** heading to retrieve

File Name	Description	Request Date / Time	Expiration Date	Export File Size	Export Status	Select
All the POs for January 2009.zip	All the orders that went out in January 2009	3/9/2009 5:20 PM	3/16/2009	149.0 KBytes	Completed	<input type="checkbox"/>
POs the Month of January 2009.zip	All the orders that went out for the month of January 2009	3/9/2009 5:19 PM	3/16/2009	6.0 KBytes	Completed	<input type="checkbox"/>

Status	PO #	Supplier Name	Creation Date	PO Total	Currency	PR ID	Requisitioner	Supplier Status	Settlement Status
Completed	900000403	Grainger	1/28/2009 10:44	1278.72	USD	263453	Graham,Derrick	Sent to Supplier	
Completed	900000402	Grainger	1/28/2009 10:40	1278.72	USD	263450	Graham,Derrick	Sent to Supplier	
Completed	900000400	QIAGEN, Inc.	1/26/2009 16:27	2037	USD	258908	Preisler,Marianne	Sent to Supplier	
Completed	900000399	Graybar Electric Co In	1/26/2009 13:34	114.2	USD	262692	Keith,Sara	Sent to Supplier	
Completed	900000398	Career Center Inc	1/26/2009 13:07	100	USD	260783	Hayes,Laura	Sent to Supplier	
Completed	900000397	Abba Construction In	1/26/2009 8:57	200	USD	262508	Sheppard,Elisabeth	Sent to Supplier	
Completed	900000396	Grainger	1/23/2009 16:40	1278.72	USD	262454	Graham,Derrick	Sent to Supplier	
Completed	900000395	Grainger	1/23/2009 16:39	109.89	USD	262453	Graham,Derrick	Sent to Supplier	
Completed	900000394	Graybar Electric Co In	1/23/2009 13:18	876.27	USD	262298	Wight,Susan	Sent to Supplier	
Completed	900000393	Grainger	1/23/2009 13:18	149.85	USD	262384	Graham,Derrick	Sent to Supplier	

For further assistance, e-mail myufmarket@ufl.edu or contact Purchasing Services at 392-1331 or visit <http://www.purchasing.ufl.edu/myufmarket>