



Step	Action																																																								
Navigation: eProcurement – Manage Requisitions																																																									
1	<p>Receiving is a required function for Purchase Orders. When an invoice is received for goods or services initiated through a requisition, receiving should be performed to acknowledge the receipt of goods/services and to authorize payment of the invoice.</p> <p>Hint: Receiving is not required for any orders initiated through the OU Marketplace or any transaction made through an OnDemand or Regular Voucher.</p>																																																								
2	To perform receiving , login to PeopleSoft Financials and click on the eProcurement tile on the Home Screen and select Manage Requisitions from the left side menu or use the NavBar and select Navigator > eProcurement > Manage Requisitions .																																																								
3	Locate the requisition by typing in the Requisition Number , updating the Date From and Date To fields or by changing the Request State to PO(s) Dispatched . By default, the date range will be within the last week and the Request State will be All but Complete .																																																								
4	Click Search . The available requisitions will be displayed. Note that OU Marketplace requisitions may be on this list but do not require receiving .																																																								
<div data-bbox="167 1050 1474 1690" data-label="Form"> <p>Manage Requisitions</p> <p>Search Requisitions</p> <p>To locate requisitions, edit the criteria below and click the Search button.</p> <p>Business Unit: OUHSC Requisition Name: _____ Requisition ID: _____ Request State: PO(s) Dispatched Budget Status: _____ Date From: 04/01/2020 Date To: 07/31/2020 Requester: 535039 Entered By: _____ PO ID: _____</p> <p>Search Clear Show Advanced Search</p> <hr/> <p>Requisitions</p> <p>To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.</p> <table border="1"> <thead> <tr> <th>Req ID</th> <th>Requisition Name</th> <th>BU</th> <th>Date</th> <th>Request State</th> <th>Budget</th> <th>Total</th> <th></th> </tr> </thead> <tbody> <tr> <td>▶ 0000000225</td> <td>2020-05-19 535039 05</td> <td>OUHSC</td> <td>05/19/2020</td> <td>PO(s) Dispatched</td> <td>Valid</td> <td>7,886.05 USD</td> <td>[Select Action] Go</td> </tr> <tr> <td>▶ 0000000221</td> <td>2020-05-19 535039 01</td> <td>OUHSC</td> <td>05/19/2020</td> <td>PO(s) Dispatched</td> <td>Valid</td> <td>1,893.35 USD</td> <td>[Select Action] Go</td> </tr> <tr> <td>▶ 0000000173</td> <td>2020-05-12 vala0003 01</td> <td>OUHSC</td> <td>05/12/2020</td> <td>PO(s) Dispatched</td> <td>Valid</td> <td>1,554.00 USD</td> <td>[Select Action] Go</td> </tr> <tr> <td>▶ 0000000169</td> <td>2020-05-11 vala0003 04</td> <td>OUHSC</td> <td>05/11/2020</td> <td>PO(s) Dispatched</td> <td>Valid</td> <td>14,099.00 USD</td> <td>[Select Action] Go</td> </tr> <tr> <td>▶ 0000000167</td> <td>2020-05-11 vala0003 01</td> <td>OUHSC</td> <td>05/11/2020</td> <td>PO(s) Dispatched</td> <td>Valid</td> <td>830.60 USD</td> <td>[Select Action] Go</td> </tr> <tr> <td>▶ 0000000165</td> <td>2020-05-11 535039 01</td> <td>OUHSC</td> <td>05/11/2020</td> <td>PO(s) Dispatched</td> <td>Valid</td> <td>373.12 USD</td> <td>[Select Action] Go</td> </tr> </tbody> </table> </div>		Req ID	Requisition Name	BU	Date	Request State	Budget	Total		▶ 0000000225	2020-05-19 535039 05	OUHSC	05/19/2020	PO(s) Dispatched	Valid	7,886.05 USD	[Select Action] Go	▶ 0000000221	2020-05-19 535039 01	OUHSC	05/19/2020	PO(s) Dispatched	Valid	1,893.35 USD	[Select Action] Go	▶ 0000000173	2020-05-12 vala0003 01	OUHSC	05/12/2020	PO(s) Dispatched	Valid	1,554.00 USD	[Select Action] Go	▶ 0000000169	2020-05-11 vala0003 04	OUHSC	05/11/2020	PO(s) Dispatched	Valid	14,099.00 USD	[Select Action] Go	▶ 0000000167	2020-05-11 vala0003 01	OUHSC	05/11/2020	PO(s) Dispatched	Valid	830.60 USD	[Select Action] Go	▶ 0000000165	2020-05-11 535039 01	OUHSC	05/11/2020	PO(s) Dispatched	Valid	373.12 USD	[Select Action] Go
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5	Locate the requisition that needs to be received on. From the drop-down menu, select Receive and click the Go button.																																																								



Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: OUHSC Requisition Name: _____

Requisition ID: _____ Request State: PO(s) Dispatched Budget Status: _____

Date From: 04/01/2020 Date To: 07/31/2020

Requester: 535039 Entered By: _____ PO ID: _____

Search Clear Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000000225	2020-05-19 535039 05	OUHSC	05/19/2020	PO(s) Dispatched	Valid	7,886.05 USD	[Select Action] <input type="button" value="Go"/>
0000000221	2020-05-19 535039 01	OUHSC	05/19/2020	PO(s) Dispatched	Valid	1,893.35 USD	Approvals <input type="button" value="Go"/>
0000000173	2020-05-12 vala0003 01	OUHSC	05/12/2020	PO(s) Dispatched	Valid	1,554.00 USD	Copy <input type="button" value="Go"/>
0000000169	2020-05-11 vala0003 04	OUHSC	05/11/2020	PO(s) Dispatched	Valid	14,099.00 USD	Edit <input type="button" value="Go"/>
0000000167	2020-05-11 vala0003 01	OUHSC	05/11/2020	PO(s) Dispatched	Valid	830.60 USD	Receive <input type="button" value="Go"/>
0000000165	2020-05-11 535039 01	OUHSC	05/11/2020	PO(s) Dispatched	Valid	373.12 USD	View Print <input type="button" value="Go"/>
							[Select Action] <input type="button" value="Go"/>

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

- 6 On the next screen, click **Add** to be taken to the Purchase Order associated with the requisition.

Favorites ▾ Main Menu ▾ > Employee Self Service > Manage Requisitions > Add/Update Receipts

Receiving

Find an Existing Value Add a New Value

Business Unit: OUHSC

Receipt Number: NEXT

PO Receipt:

Find an Existing Value | Add a New Value

- 7 The next screen will display the PO and all the PO lines. Click on the box to the left of the **PO ID** field for all the lines to be received and click **OK**. To select all lines on the PO, click the **Select All** hyperlink and then click **OK**.



Select Purchase Order

Search Criteria

PO Unit: OUHSC Days +/- Today: 30

ID: 0000000570 Start Date: 05/14/2020

Line: Schedule: End Date: 07/13/2020

Release: Supplier Name: AMERISOURC-001 [Supplier Lookup](#)

Item ID: Supplier Item ID:

Ship To: Manufacturer ID:

Ship Via: Manufacturer's Item ID:

Retrieve Open PO Schedules UPN ID:

Receipt Qty Options

No Order Qty Ordered Qty PO Remaining Qty

Retrieved Rows [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Selected Rows	Shipping Related	More Details									
Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description	
<input checked="" type="checkbox"/>	OUHSC	0000000570	1	1		06/12/2020	5.0000			Vaccines	
<input checked="" type="checkbox"/>	OUHSC	0000000570	2	1		06/12/2020	250.0000			Syringes	

- 8 Enter in the appropriate **Receipt Quantity** or **Receipt Price** for the goods/services received. Remember that these are the lines that correlate to the invoice that needs to be paid. Do not receive on lines that you have been invoiced for but have not received. In this situation, contact the supplier to resolve the billing issue and request a revised invoice before performing any receiving.

Hint: **Receiving** is authorization to pay the invoice that is being attached to the receipt.



Maintain Receipts

Receiving

Business Unit OUHSC Receipt Status Open ✘

Receipt ID NEXT Header Comments/Attachments Activities

Header Details

Header

Select Purchase Order Close Short All Lines Print Delivery Report Run PO Receipt Accrual

Receipt Lines Personalize | Find | View All | First 1-2 of 2 Last

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information								
Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Device Track	
1		Vaccines	250.0000	EA	500.00000	250.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track	✘
2		Syringes	1.0000	EA	2.00000	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track	✘

Interface Receipt Run Close Short Interface Asset Information

Save Notify Refresh Add Update/Display

9 For goods related Purchase Orders, you will enter in the number of goods received in the **Receipt Qty** field. The **Receipt Price** reflects the total quantity established on the Purchase Order.

10 For service related Purchase Orders, you will enter in the total cost of services received in the **Receipt Price** field.

Maintain Receipts

Receiving

Business Unit OUHSC Receipt Status Fully Received ✘

Receipt ID NEXT Header Comments/Attachments Activities

Header Details

Header

Select Purchase Order Close Short All Lines Print Delivery Report Run PO Receipt Accrual

Receipt Lines Personalize | Find | View All | First 1 of 1 Last

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information								
Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Device Track	
1		Transcription Services	1.0000	EA	150.00000	1.0000	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track	✘

Interface Receipt Run Close Short Interface Asset Information

Save Notify Refresh Add Update/Display

11 All receipts will require the invoice to be attached. Click on the **Header Comments/Attachments** hyperlink and a pop-up attachment window will appear. Click **Attach** and the File Attachment pop-up will appear. Click **Browse**, locate the attachment and click **Upload**. Once the file is attached, click **OK** to close the pop-ups.



The screenshot shows the 'Maintain Receipts' application interface. The main window is titled 'Receiving' and displays 'Business Unit OUHSC' and 'Receipt Status Fully Received'. A yellow box highlights the 'Header Comments/Attachments' button. An open window titled 'Receipt Header Comments' shows 'Business Unit OUHSC' and 'Receipt Number NEXT'. It includes a 'Retrieve' button, a 'Sort Method' dropdown set to 'Comment Time Stamp', and a 'Sort Sequence' dropdown set to 'Ascending'. A 'Comments' section has a text area and an 'Inactivate' button. Below that is an 'Associated Document' section with an 'Attach' button highlighted in yellow. A 'File Attachment' dialog box is open on the right, showing 'Browse...' and 'No file selected.' with 'Upload' and 'Cancel' buttons.

12 When complete, click **Save** and the receipt number will appear in the **Receipt ID** field.

The screenshot shows the main 'Maintain Receipts' application interface. The 'Business Unit OUHSC' and 'Receipt Status Fully Received' are displayed. The 'Receipt ID' field now contains '000000042' and is highlighted in yellow. The 'Header' section is expanded, showing 'Select Purchase Order' and buttons for 'Close Short All Lines', 'Print Delivery Report', and 'Run PO Receipt Accrual'. The 'Receipt Lines' section contains a table with one line item: 'Transcription Services' with a quantity of 1.0000 and a price of 100.00000. The 'Save' button at the bottom left is highlighted in yellow.

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Device Track
1		Transcription Services	1.0000	100.00000	1.0000	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Track

13 To create another receipt, click on **Manage Requisitions** in the menu at the top of the screen to be returned to your requisitions.



[Favorites](#) > [Main Menu](#) > [Employee Self Service](#) > **Manage Requisitions** > [Add/Update Receipts](#)

[Maintain Receipts](#)
[Receiving](#)

14 Note that the **Request State** will display the status of receiving. **PO(s) Dispatched** means that there no associated receipts. **Partially Received** means that some receipts exist. **Received** means that the order has been fully received.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:
 Requisition ID: Request State: Budget Status:
 Date From: Date To:
 Requester: Entered By: PO ID:

[Show Advanced Search](#)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000000192	0000000192	OUHSC	06/11/2020	Partially Received	Valid	2,000.00 USD	[Select Action] Go
▶ 0000000209	0000000209	OUHSC	06/13/2020	Partially Received	Valid	7,800.00 USD	[Select Action] Go
▶ 0000000193	0000000193	OUHSC	06/11/2020	Partially Received	Valid	2,500.00 USD	[Select Action] Go
▶ 0000000191	0000000191	OUHSC	06/11/2020	Received	Valid	1,500.00 USD	[Select Action] Go
▶ 0000000201	0000000201	OUHSC	06/12/2020	PO(s) Dispatched	Valid	1,200.00 USD	[Select Action] Go

15 To view the payment status of a receipt, click the drop-down arrow to the left of the **Req ID** to open the request lifespan. Click on the **Invoice** icon to see invoices associated with receipts.

0000000192 0000000192 OUHSC 06/11/2020 Partially Received Valid 2,000.00 USD [Select Action] Go

Requisition Pre-Encumbrance Balance Not Available Entered By Priority Medium

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Request Lifespan:

Line Information Personalize | Find | First 1 of 1 Last

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	Office Supplies	Partially Received	500.0000	USD	4.0000	EA	AMERISOURCEBERGEN DRUG CORPORATION



16 If you are unable to **receive** appropriately due to the cost/quantity or lines available on the Purchase Order, a Change Order will have to be submitted.

Hint: Refer to the job aid on Change Orders more information on the Change Order process.