



**Step Action**  
**Navigation: eProcurement – Manage Requisitions**

- 1 **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.  
  
**Hint:** **Receiving** is **not** required for any orders initiated through the OU Marketplace or any transaction made through an OnDemand or Regular Voucher.
- 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**.

**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] 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

- 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  Requisition Name

Requisition ID  Request State  Budget Status

Date From  Date To

Requester  Entered By  PO ID

[Show Advanced Search](#)

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**Requisitions**

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▶ 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

Business Unit

Receipt Number

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:      Manufacturer ID:      Manufacturer's Item ID:      UPN ID:      Ship To:      Ship Via:       Retrieve Open PO Schedules

**Receipt Qty Options**  
 No Order Qty       Ordered Qty       PO Remaining Qty

**Retrieved Rows**      Personalize | Find | View All | 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	

Select All       Clear All

OK      Cancel      Refresh

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      PO Voucher - Special Processing: \*Priority Processing | Normal Processing

Receipt ID: NEXT      Header Comments/Attachments      Activities      254 characters remaining

**Header**      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.

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	PO Number	Receiver User ID	Receiver User Name	Device Track
1	Property Lease Space	Property Lease Space	1.0000	1641420.81	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0000001629	506696	Twyla Juanzell Taylor	Device Track

- 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.



12 All receipts will default in with **Normal Processing** instructions. However, if a receipt needs to be rushed for payment or there are other handling instructions, those can be added to the receipt in the **PO Voucher - Special Processing** section. **Rush** vouchers will require additional justification for rushing the payments in the **Rush Justification Handling** section. Vouchers noted as requiring **Special Handling** should have the specific instructions on handling entered in this section.

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

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

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



15 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: OUHSC Requisition Name: [ ]  
 Requisition ID: [ ] Request State: All but Complete Budget Status: [ ]  
 Date From: 06/06/2020 Date To: 06/13/2020  
 Requester: 520767 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	
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

16 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

Requester: [ ] Entered By: [ ] Priority: Medium  
 Pre-Encumbrance Balance: Not Available

Requestion 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

17 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.