



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>
<pre> graph TD A[Requisition entered and approved by department] --> B[Purchase Order dispatched by Purchasing] B --> C[Invoice received by department from supplier] C --> D[Department enters receipt against Requisition] D --> E[Receipt used by Accounts Payable to create a PO voucher] E --> F[Supplier paid] </pre>	
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

Requisition
Activity Summary
Print POs
Supplier

Manage Requisitions

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

Business Unit: NORMN
Requisition Name: _____
Requisition ID: _____
Request State: All but Complete
Budget Status: _____
Date From: 02/10/2022
Date To: 02/17/2022
Origin: _____
Org: _____
Requester: _____
Entered By: _____
Supplier: _____
PO ID: _____

Search Clear Show Advanced Search

! The Requester specified has no Requisitions.

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

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: NORMN
Requisition Name: _____
Requisition ID: _____
Request State: PO(s) Dispatched
Budget Status: _____
Date From: _____
Date To: 02/17/2022
Origin: _____
Org: _____
Requester: _____
Entered By: _____
Supplier: _____
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		
▶ 0000020634	0000020634	NORMN	02/15/2022	PO(s) Dispatched	Valid	12,435.00 USD	[Select Action]	Go
▶ 0000020633	0000020633	NORMN	02/15/2022	PO(s) Dispatched	Valid	850.00 USD	[Select Action]	Go
▶ 0000020629	0000020629	NORMN	02/15/2022	PO(s) Dispatched	Valid	2,225.00 USD	[Select Action]	Go
▶ 0000020627	0000020627	NORMN	02/15/2022	PO(s) Dispatched	Valid	1,230.00 USD	[Select Action]	Go
▶ 0000020614	0000020614	NORMN	02/14/2022	PO(s) Dispatched	Valid	70.00 USD	[Select Action]	Go
▼ 0000020613	0000020613	NORMN	02/14/2022	PO(s) Dispatched	Valid	15,150.00 USD	[Select Action]	Go

Requester: _____ Entered By: _____ Priority: Medium

Pre-Encumbrance Balance: Not Available

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns

Request Lifespan:

Line Information Personalize | Find | First 1-3 of 3 Last

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier	
1	Nike Shoes	PO Dispatched	198.00	USD	50.00	EA	NIKE USA INC	✗
2	Jersey	PO Dispatched	85.00	USD	50.00	EA	NIKE USA INC	✗
3	Shipping	PO Dispatched	1000.00	USD	1.00	LOT	NIKE USA INC	✗

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



Receiving

Find an Existing Value
Add a New Value

Business Unit 🔍

PO Receipt

Add

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 line 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

ID

Line Schedule

Release

Item ID

Ship To

Ship Via

Retrieve Open PO Schedules

Days +/- Today

Start Date

End Date

Supplier Name [Supplier Lookup](#)

Supplier Item ID

Manufacturer ID

Manufacturer's Item ID

UPN ID

Receipt Qty Options

No Order Qty
 Ordered Qty
 PO Remaining Qty

Retrieved Rows

1-3 of 3 | [View All](#)

Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input type="checkbox"/>	NORMN	0000019038	1	1		02/14/2022	50.0000			Nike Shoes
<input type="checkbox"/>	NORMN	0000019038	2	1		02/14/2022	50.0000			Jersey
<input type="checkbox"/>	NORMN	0000019038	3	1		02/14/2022	1.0000			Shipping

[Select All](#) [Clear All](#)

OK
Cancel
Refresh



8 Note that if two or more Purchase Orders are issued from the same requisition and the first PO is cancelled, the wrong PO number will default in the receiving screen.

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	TV	PO Canceled	750.00	USD		1.00 EA	MATHIS BROTHERS FURNITURE
2	TV Stand	Partially Received	100.00	USD		1.00 EA	MATHIS BROTHERS FURNITURE

9 You will need to manually update the PO number to see the correct line(s) to receive on.

Look Up ID

PO Business Unit: NORMN
 Order ID: begins with 0000019059

Buttons: Search, Clear, Cancel, Basic Lookup

Search Results: View 100, 1-1 of 1

Order ID	Purchase Order Reference	PO Status	Buyer
0000019059	(blank)	Dispatched	475516

10 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 NORMN Receipt Status Open

Receipt ID NEXT Header Comments/Attachments Activities

Header Details

PO Voucher - Special Processing

*Priority Processing Normal Proc

Rush Justification Handling

Header

Select Purchase Order

Close Short All Lines Print Delivery Report Run PO Receipt Accrual

Receipt Lines

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	PO ID	Requisition ID
1		Nike Shoes	5	EA	198.00	50.00	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	0000019038	0000020613
2		Jersey	10	EA	85.00	50.00	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	0000019038	0000020613
3		Shipping	1.00		25	1.00	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0000019038	0000020613

Interface Receipt Run Close Short Interface Asset Information Receipt Total 1283.00

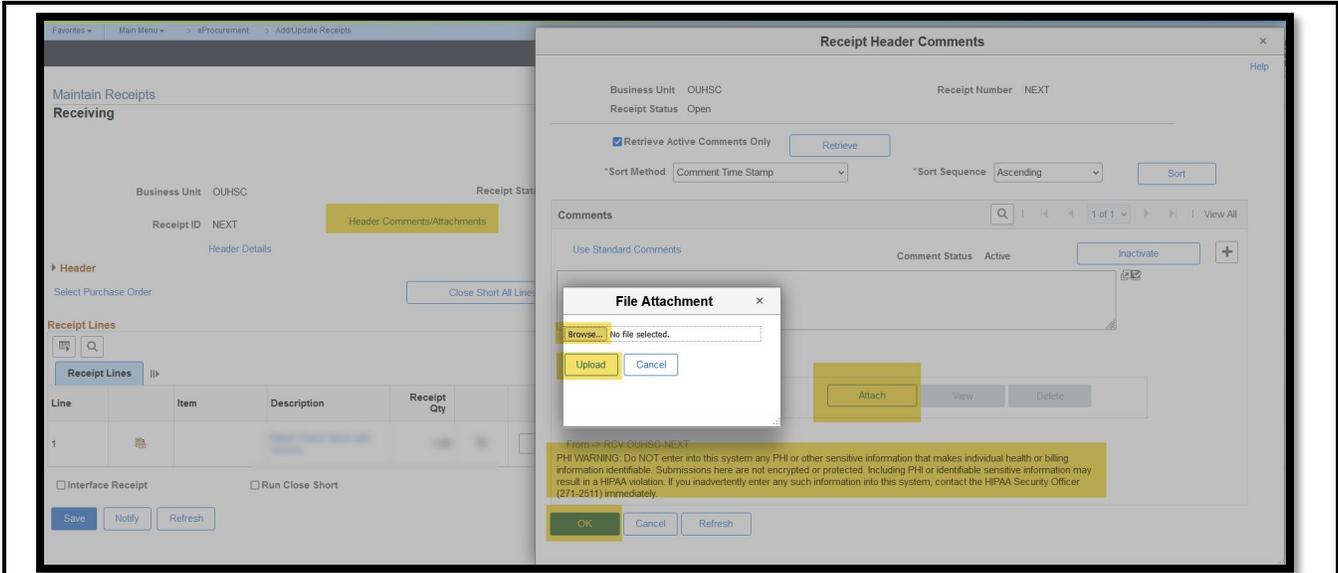
Save Notify Refresh

11 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.

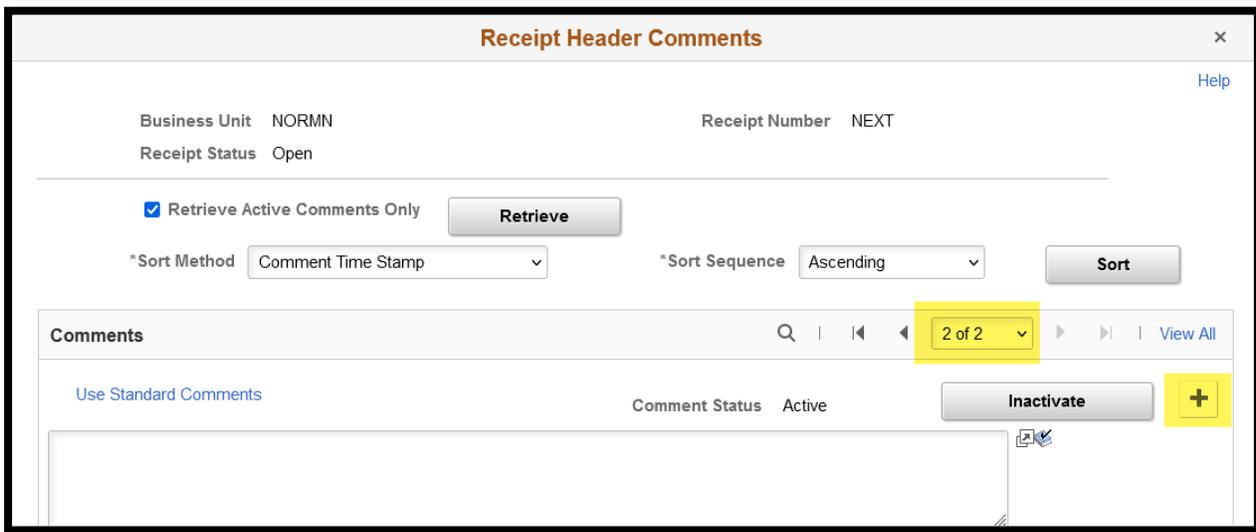
12 For service-related Purchase Orders, you will enter in the total cost of services received in the **Receipt Price** field.

13 For mixed Purchase Orders, you will receive on both quantity and price.

14 All receipts will require the invoice to be attached. Click on the **Header Comments/Attachments** hyperlink and a pop-up attachment window will appear. Please note the **PHI warning** regarding all attachments. 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.



15 To add additional attachments, click the plus button +. The number of pages will change, and additional attachments can be added by going through the same attachment process.



16 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.



Maintain Receipts
Receiving

Business Unit NORMN Receipt Status Open

Receipt ID NEXT Edit Header Comments/Attachments Activities

Header Details

Header

Select Purchase Order

Close Short All Lines Print Delivery Report Run PO Receipt Accrual

PO Voucher - Special Processing

*Priority Processing Normal Proc

Rush Normal Processing

Rush Handling Special Handling

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

Maintain Receipts
Receiving

Business Unit NORMN Receipt Status Fully Received

Receipt ID 0000046256 Edit Header Comments/Attachments Activities

Header Details Document Status

Header

Select Purchase Order

Close Short All Lines Print Delivery Report Run PO Receipt Accrual

PO Voucher - Special Processing

*Priority Processing Normal Proc

Rush Justification Handling

Receipt Lines

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	PO ID	Requisition ID
1		Nike Shoes	5.00	EA	198.00	5.00	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	0000019038	0000020613
2		Jersey	10.00	EA	85.00	10.00	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	0000019038	0000020613
3		Shipping	1.00		25.00	1.00	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0000019038	0000020613

Interface Receipt Run Close Short Interface Asset Information Receipt Total 308.00

Save Notify Refresh

18 **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 Origin Org

Requester Entered By Supplier 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		
▶ 0000020634	0000020634	NORMN	02/15/2022	PO(s) Dispatched	Valid	12,435.00 USD	[Select Action]	Go
▶ 0000020633	0000020633	NORMN	02/15/2022	PO(s) Dispatched	Valid	850.00 USD	[Select Action]	Go
▶ 0000020631	0000020631	NORMN	02/15/2022	Received	Valid	6,000.00 USD	[Select Action]	Go
▶ 0000020629	0000020629	NORMN	02/15/2022	PO(s) Dispatched	Valid	2,225.00 USD	[Select Action]	Go
▶ 0000020627	0000020627	NORMN	02/15/2022	PO(s) Dispatched	Valid	1,230.00 USD	[Select Action]	Go
▶ 0000020619	0000020619	NORMN	02/14/2022	PO(s) Completed	Valid	750.00 USD	[Select Action]	Go
▶ 0000020618	0000020618	NORMN	02/14/2022	Received	Valid	950.00 USD	[Select Action]	Go
▶ 0000020616	0000020616	NORMN	02/14/2022	Received	Valid	750.00 USD	[Select Action]	Go
▶ 0000020614	0000020614	NORMN	02/14/2022	PO(s) Dispatched	Valid	70.00 USD	[Select Action]	Go
▶ 0000020613	0000020613	NORMN	02/14/2022	Partially Received	Valid	15,150.00 USD	[Select Action]	Go

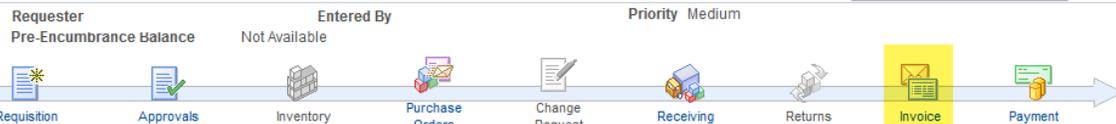
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To view the payment status of a receipt, click the drop-down arrow to the left of the **Req ID** to open the request lifespan. Click on the **Invoice** icon to see invoices associated with receipts.

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		
▶ 0000020613	0000020613	NORMN	02/14/2022	Partially Received	Valid	15,150.00 USD	[Select Action]	Go
▶ 0000019008	Clegg20987 Fisher111721	NORMN	11/17/2021	Partially Received	Valid	87,042.91 USD	[Select Action]	Go
▼ 0000013032	QSS FY22 PM & Service	NORMN	07/06/2021	Partially Received	Valid	13,100.00 USD	[Select Action]	Go



Request Lifespan:

Line Information

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	PM & Service 3 boilers & 3 P...	Partially Received	13100.00	USD	1.00	EA	QUALITY STERILIZER SERVICES INC

Create New Requisition

Review Change Request

Review Change Tracking

Manage Receipts

Requisition Report

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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.
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