



Step	Action
<b>Navigation: eProcurement – Manage Requisitions</b>	
1	<p><b>Receiving</b> is a required function for Purchase Orders. When an invoice is <b>received</b> for goods or services initiated through a requisition, <b>receiving</b> should be performed to acknowledge the receipt of goods/services <b>and</b> to authorize payment of the invoice.</p> <p><b>Hint:</b> <b>Receiving</b> is <b>not</b> 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] --&gt; B[Purchase Order dispatched by Purchasing]     B --&gt; C[Invoice received by department from supplier]     C --&gt; D[Department enters receipt against PO]     D --&gt; E[PO voucher entered and approved by Accounts Payable from receipt]     E --&gt; F[Supplier paid]   </pre>	
2	To perform <b>receiving</b> , login to <b>PeopleSoft Financials</b> and click on the <b>eProcurement</b> tile on the <b>Home Screen</b> and select <b>Manage Requisitions</b> from the left side menu or use the <b>NavBar</b> and select <b>Navigator &gt; eProcurement &gt; Manage Requisitions</b> .
3	Locate the requisition by typing in the <b>Requisition Number</b> , updating the <b>Date From</b> and <b>Date To</b> fields or by changing the <b>Request State</b> to <b>PO(s) Dispatched</b> . By default, the date range will be within the last week and the <b>Request State</b> will be <b>All but Complete</b> .
4	Click <b>Search</b> . The available <b>requisitions</b> will be displayed. Note that OU Marketplace requisitions may be on this list but <b>do not</b> require <b>receiving</b> .



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	
▶ 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](#)

Requisitions

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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	Approvals Go
▶ 0000000173	2020-05-12 vala0003 01	OUHSC	05/12/2020	PO(s) Dispatched	Valid	1,554.00 USD	Copy Go
▶ 0000000169	2020-05-11 vala0003 04	OUHSC	05/11/2020	PO(s) Dispatched	Valid	14,099.00 USD	Edit Go
▶ 0000000167	2020-05-11 vala0003 01	OUHSC	05/11/2020	PO(s) Dispatched	Valid	830.60 USD	Receive Go
▶ 0000000165	2020-05-11 535039 01	OUHSC	05/11/2020	PO(s) Dispatched	Valid	373.12 USD	View Print Go
							[Select Action] 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

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

Selected Rows	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](#)

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 **X**

Receipt ID NEXT Header Comments/Attachments Activities

PO Voucher - Special Processing

\*Priority Processing Normal Processing

Rush Justification Handling

254 characters remaining

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	Device Track
1		Vaccines	250.0000	EA	500.00000	250.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track <b>X</b>
2		Syringes	1.0000	EA	2.00000	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track <b>X</b>

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 Open **X**

Receipt ID NEXT Header Comments/Attachments Activities

PO Voucher - Special Processing

\*Priority Processing Normal Processing

Rush Justification Handling

254 characters remaining

Header

Select Purchase Order

Close Short All Lines Print Delivery Report Run PO Receipt Accrual

Receipt Lines

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	1.0000	1641420.81	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0000001629	506696	Twyla Juanzell Taylor	Device Track <b>X</b>

Interface Receipt  Run Close Short

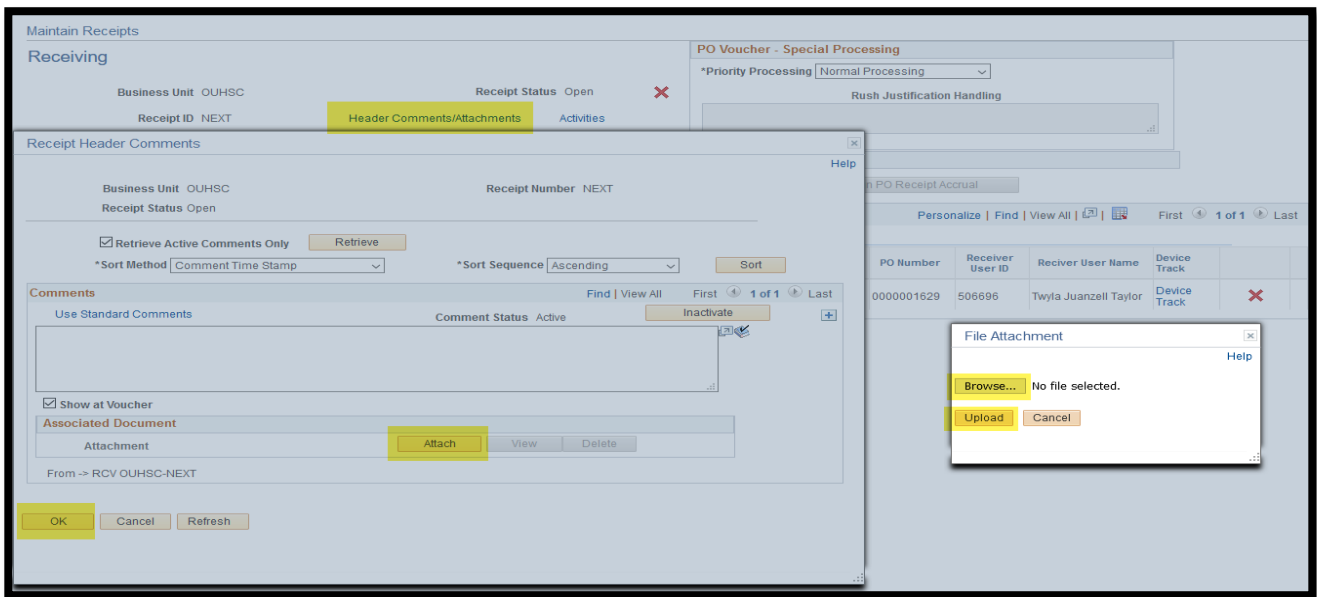
Interface Asset Information

Save Notify Refresh Add Update/Display

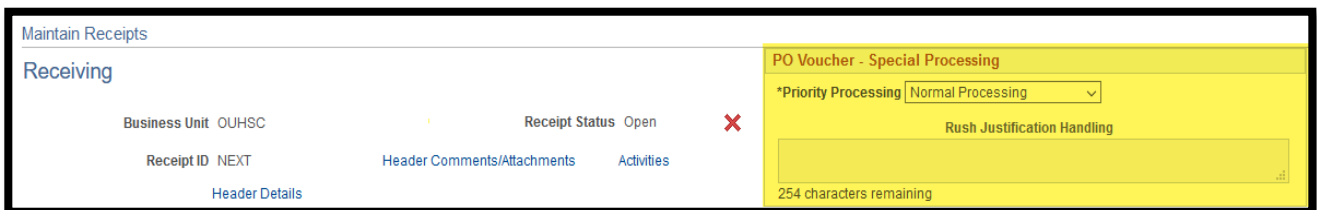
**11** All receipts will require the invoice to be attached. Click on the **Header Comments/Attachments** hyperlink and a pop-up attachment window will appear. Click



**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.



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.



Maintain Receipts

Receiving

Business Unit OUHSC Receipt Status Fully Received

Receipt ID 000000042 Edit Header Comments/Attachments Activities

Header Details Document Status

Header

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

Receipt Lines Personalize Find View All 1 of 1 Last

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

Interface Receipt  Run Close Short Interface Asset Information

Save Notify Refresh Add Update/Display

14 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

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Maintain Receipts

Receiving

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:  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

**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

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

**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.