

Receiving via Manage Requisitions

The purpose of this job aid is to provide requisition preparers instructions for receiving via the **Manage Requisitions** page in EFS (the University’s financial system).

Navigate to: **eProcurement>Manage Requisitions**. By default, this page will populate requisitions that have you as the requester, and were created within the last week (seven days). If the requisition was created before that timeframe or by another requester, change the parameters then click <Search>. In addition, the requisition must have the *Request Status* of “PO(s) Dispatched” or “Partially Received” and a “Valid” *Budget* to be eligible for receiving.

Manage Requisitions

Search Requisitions

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

Business Unit	UMN01	Requisition Name	
Requisition ID		Request Status	All but Complete
Date From	08/03/2015	Date To	08/10/2015
Requester	PETER026	Entered By	
		Budget Status	
		PO ID	

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 Status	Budget	Total		
▶ 0000980890	1990 capillaries filters	UMN01	08/05/2015	PO(s) Dispatched	Valid	479.96 USD	[Select Action]	Go
▶ 0000980406	1990 SYBR QPCR kit	UMN01	08/04/2015	PO(s) Dispatched	Valid	426.00 USD	[Select Action]	Go
▶ 0000979722	5598 Exiqon probe	UMN01	08/03/2015	PO(s) Dispatched	Valid	674.13 USD	[Select Action]	Go

Locate the intended requisition. Select “Receive Items” from the dropdown menu, then click <Go>.

Manage Requisitions

Search Requisitions

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Business Unit	UMN01	Requisition Name	
Requisition ID		Request Status	All but Complete
Date From	08/03/2015	Date To	08/10/2015
Requester	PETER026	Entered By	
		Budget Status	
		PO ID	

Requisitions

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Req ID	Requisition Name	BU	Date	Request Status	Budget	Total		
▶ 0000980890	1990 capillaries filters	UMN01	08/05/2015	PO(s) Dispatched	Valid	479.96 USD	[Select Action]	Go
▶ 0000980406	1990 SYBR QPCR kit	UMN01	08/04/2015	PO(s) Dispatched	Valid	426.00 USD	Receive	Go
▶ 0000979722	5598 Exiqon probe	UMN01	08/03/2015	PO(s) Dispatched	Valid	674.13 USD	[Select Action]	Go

The **Receive Items** page will appear.

Key Considerations:

- A. Review the total quantity or amount of the PO and compare it to what has been received (accepted) to date. If it is an insufficient number, contact the procurement specialist.
- B. Ensure the proper *UOM* (unit of measure) criteria exist for receiving by amount vs. quantity. If it is the wrong type, contact the procurement specialist.
- C. (optional) If receiving multiple items, all items must be associated to the same PO or the receipt cannot be saved. To view each item’s associated PO, click <Purchase Order Details>.

Receive Items

You have 1 line open for receiving for requisition 1990 SYBR QPCR kit

and go to the Receive Form.

C

A **B**

Requisition Lines to Receive Purchase Order Details

Req BU	Requisition	Item Description	Item I	Tot Req Qty/Amt	Accepted Date	UOM	Ship To	Ship To GLN	Attention To	Supplier	Supplier ID Number
<input type="checkbox"/>	UMN01	1990 SYBR QPCR kit	204143 QuantiTect SYBR Green PCR Kit (200)	1	0	EA	P117840004		Mark Peterson	QIAGENINC-001	

[Inquire Receipts](#)

Place a checkbox in the line(s) you wish to receive. Click <Receive Selected>.

Receive Items

You have 1 line open for receiving for requisition 1990 SYBR QPCR kit

and go to the Receive Form.

Requisition Lines to Receive Purchase Order Details

Req BU	Requisition	Item Description	PO Unit	Purchase Order	PO Qty	Receiving Required
<input checked="" type="checkbox"/>	UMN01	1990 SYBR QPCR kit	UMN01	0001069848	1.0000	Required

[Inquire Receipts](#)

The **Receive Items** page will appear. The information from the selected line(s) will appear. Receive only the intended amount or quantity (do not over receive). Where appropriate, enter any necessary comments or add attachments at either the header or line level comments.

Receive Items

New Receipt

*Business Unit

Receipt Status Open Supplier: QIAGENINC-001

*Received Date

Add Header Comments Reject Shipment

Line	PO ID	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Cancel Line
1	0001069848	204143 QuantiTect SYBR	<input type="text" value="1.0000"/>	EA	1.0000				N				X

Save Receipt

Add New Receipt Inquire Receipts

Where appropriate, enter any necessary comments or add attachments at either the header or line level comments (optional).

Receive Items

New Receipt

*Business Unit

Receipt Status Open Supplier: QIAGENINC-001

*Received Date

Add Header Comments Reject Shipment

Line	PO ID	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Cancel Line
1	0001069848	204143 QuantiTect SYBR	<input type="text" value="1.0000"/>	EA	1.0000				N				X

Save Receipt

Add New Receipt Inquire Receipts

Once all data has been verified as correct, click <Save>.

Receive Items

New Receipt

*Business Unit

Receipt Status Open Supplier: QIAGENINC-001

*Received Date

Add Header Comments Reject Shipment

Line	PO ID	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Cancel Line
1	0001069848	204143 QuantiTect SYBR	<input type="text" value="1.0000"/>	EA	1.0000				N				X

Save Receipt

Add New Receipt Inquire Receipts

A confirmation will appear. You may either return to the **Manage Requisitions** or **Receive Items** pages.

Receipt Saved Successfully

You have saved receipt # 0000926677 containing the following items:

Receipt Lines		Personalize	Find	First	1 of 1	Last
Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity		
1	204143 QuantiTect SYBR Green PCR Kit (200)	1.0000		1.0000		

[Return to Manage Requisitions](#)

[Return to Receiving](#)