Receive (Partial) using Req. Info in "ePro-Manage Requisitions"

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<tr>
<td>1.</td>
<td>Your Berkeley Financial System (BFS) Home page may look different, depending on your user access. Click the eProcurement link.</td>
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<td>2.</td>
<td>Click the Manage Requisitions link.</td>
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<td>3.</td>
<td>Click the Collapse (Ctrl+Y) Menu button.</td>
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<td>4.</td>
<td>The Manage Requisitions page appears. On this page, you can Search for the item(s) you are Receiving. You can search by the Requisition ID of the Requisition that was used to order the item(s), or you can search by other Requisition information, including: - Date (the Date the Requisition was created) - Requester - Entered by (Requisition Preparer) - PO ID (PO number for PO related to the Requisition)</td>
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<td>5.</td>
<td>Note that the first time that you pull up the Manage Requisitions page in each BFS session, the system will enter the following defaults: - Date From: one week prior to the current date - Date To: the current date If you are searching for a requisition that was not created between those dates, you will need to change or (the easiest option) delete them. Also note that the Request Status defaults to &quot;All but Complete.&quot; As you can only receive items in BFS for which the PO is Dispatched, you may wish to limit your search to &quot;PO(s) Dispatched.&quot; When you return to the Manage Requisitions page during a BFS session, the search fields will have the information you entered the last time you were on the page. If you leave BFS and return later (for example, the following day), the defaults for that date will appear.</td>
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<td>6.</td>
<td>The easiest way to delete all the default entries is to &quot;Clear&quot; them. Click the Clear button.</td>
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| 7.   | In this example, we know the **Requisition ID number**, and we just want to pull up that one Requisition, so we don't need to search by any parameter other than **Requisition ID**.  
Click in the **Requisition ID** field. |
| 8.   | Enter the requisition number into the **Requisition ID** field.  
In this example, enter “0000000258”.  
Please note that (7) leading zeros are required. |
| 9.   | Click the **Search** button.  
[Search] |
| 10.  | The Requisition(s) that meet your search parameters will appear below the dark blue **Requisition** header line.  
Note the instructions for viewing the "**lifespan**" (related documents and actions) and **line items** for each requisition on the list. |
| 11.  | In this example, we want to see the **lifespan** and **line items** for Requisition 0000000258, so we will click on the **Expand Section triangle** icon to the left of Requisition ID 0000000258.  
Click the **Expand Section triangle icon**. |
| 12.  | The **Request (Requisition) "Lifespan"** and **Line Items** appear.  
Note that the names of the **Requester** and **Requisition Creator ("Entered By")** appear above the **Lifespan** icons  
For more information about this Requisition, you could click on the different **Lifespan** icons to see the details regarding that part of the requisition's life cycle - For example, you can see:  
- the **Approval** details by clicking on the **Approvals icon**  
- the **Purchase Order** number and details by clicking on the **Purchase Order icon**  
- the **Voucher** information by clicking on the **Invoice icon**  
The **Line Information** section shows the 5 PO lines for this Requisition. We can click on the item name link in the **Description** column of this section to see the details of that item. |
| 13.  | Note the instructions above the Requisition Lifespan for performing an action on this Requisition.  
In this example, the line 1 Buffer and 2 of the Titertubes on line 2 have arrived, so we are ready to **Receive** them in BFS.  
Click the **Down Arrow** next to the **<Select Action...** field. |
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<td>The <strong>Select Action</strong> drop down list appears. Click on <strong>Receive Order</strong>.</td>
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<tr>
<td>15.</td>
<td>Notice that <strong>Receive Order</strong> is now entered in the Action field. Click the <strong>Go</strong> button.</td>
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</table>
| 16. | The **Receive Items** page appears with a list of the items from your Requisition. Note - This list will include only lines that are "open" for Receiving in BFS. Open items are items for which:  
- The PO is in "Dispatched" (approved) status  
- The PO line still has items that have not yet been Received in BFS.  
On this page, there are **two tabs**: **Requisition Lines to Receive** and **Purchase Order Details**. Both tabs list the same items, but show different details for the items. You can **Select** items to receive on either tab. In this example, we will **Select** our items on the default **Requisition Lines to Receive** tab, because it shows **Vendor** and previous Receipt (**Accepted to Date**) information. |
<p>| 17. | To select an item for <strong>Receipt</strong>, we need to check the box to the left of that item's line. You can select <strong>some or all</strong> of the lines. In this example, some items have arrived from the <strong>first 2 lines</strong>. Click the <strong>Check Box</strong> to the left of the first line to select that item. |
| 18. | Click the <strong>Check Box</strong> to the left of the second line to also select that line. |
| 19. | Click the <strong>Purchase Order Details</strong> tab to see PO details for these items. |
| 20. | Note that the first 2 lines are still selected. You may select <strong>multiple lines</strong> of items to Receive on one Receipt if they are from the <strong>same Purchase Order</strong>. In this example, the <strong>Purchase Order</strong> column shows that both lines are from PO <strong>0000000225</strong>. |</p>
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| 21.  | We have checked the quantity of items delivered and their condition and have verified that they are (indeed) the items ordered and are in acceptable condition, so we are ready to **Receive** them in BFS.  
(For the procedure to follow if some or all of the goods are not acceptable, see *Return to Vendor - Vendor will Replace* and *Return to Vendor - Vendor issues Credit.*)  
Click the **Receive Selected** button. |
| 22.  | The **Receive Items - New Receipt** page appears and only shows your selected requisition line(s). Note that the **Receipt Status** is **Open** (not yet **Saved**).  
Note: There are several ways to check the specifics of the order:  
1) Click the item name link in the **Item Description** column and  
2) Click the yellow/red "**Details**" icon just to the right of the **Accept Qty** column.  
If you need to add a comment to your Receipt line, you can use the **Comment** bubble at the end of the line. |
| 23.  | The **Received Qty** column is filled by default with the Requisition quantity that is left to receive for that line item.  
In this example, we are receiving the 1 Buffer ordered on line 1, but only 2 of the 3 Titertubes ordered on line 2, so we need to change the **Received Qty** on line 2 from 3.0000 to "2.0000". |
| 24.  | We have highlighted the **Received Qty** on line 2 and will delete it so we can enter the correct quantity.  
Press the **[Delete]** key. |
| 25.  | Now enter the quantity of items on line 2 that have actually arrived.  
In this example enter "2". |
| 26.  | Now we are ready to **Save** this  
Click the **Save Receipt** button. |
## Step 27.

The **Receipt Saved Successfully** page appears.

Notice that the receipt shows only the **Received Qty** of items actually received, and that it has been assigned a **Saved Receipt #**, which you can use to find this receipt later if necessary.

A **Three-way Match** compares the **Purchase Order**, this **Receipt** and the **Voucher** created by Disbursements. When these three items match, payment to the vendor occurs.

For instructions on what to do when there is **not** a match, see **Correcting a Failed Match**.

## Step 28.

In this example, we have finished **Receiving** the items from this Requisition and want to return to **Manage Requisitions** to Receive items from other Requisitions.

Click the **Return to Manage Requisitions** link.

Return to Manage Requisitions

## Step 29.

We are now back on the **Manage Requisitions - Search** page.

Note that the Requisition you just partially **Received** now has the **Receiving icon** highlighted in the **Lifespan**, and shows "**Received**" for Line 1 and "**Partially Received**" for Line 2 **Status**.

## Step 30.

We can now begin **Receiving** or another action for other Requisitions.

End of Procedure.