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RECEIVING OVERVIEW

Receiving allows you to track the receipt of item. The functionality provides the ability to partially or completely accept goods and/or services, or reject items/services. The receiver of the goods/services is also the approver of the receipt. The approval is automatic when the receipt is processed. (Ad hoc approvers can be added to the receipt.)

There are two types of receiving: Desktop Receiving and Central Receiving. The type of receiving used is determined by the setup of the BuysenseOrg (BSO) to which your user profile is assigned.

In Desktop Receiving, the requester of the requisition is authorized to process the receipt(s) when goods or services are delivered. ONLY the requester can receive against the order. This means that if the preparer is NOT the requester (the preparer name does not appear in the ‘on behalf of’ field on the requisition), the preparer will not be able to receive against the order they initiated.

In Central Receiving, a designated user (e.g. an employee at a central warehouse) receives the goods or services on behalf of the requester. The requester of the requisition cannot do receiving if the receiving role is assigned to the applicable requester’s BSO (Buysense Org).

There are two methods of receiving: receive by Quantity and/or receive by Amount. The default method is Quantity but a user within an entity authorized to receive by Amount will have the option to change the method to Amount on the line.

IMPORTANT- If the user’s BSO changes for receiving at the time a receipt is processed, the official receiver on any partial receipt could change. See Important Notes at end of document.

Receiving phrases and descriptions:

- **Reopen Closed Order** – A ‘Reopen Order’ button is provided for situations where changes must be made on requisitions and the order has been fully received.

- **Rejected Items** – A ‘Reject’ field is provided for situations where an item is received but not yet recorded as having been received, and must be returned to the vendor for some reason (defective/not ordered, etc.). This field should **NOT** be used for items that need to be returned after the item(s) has been recorded as having been received.

- **Negative Receiving** – The ‘Accept/Return’ field is used for situations where item(s) are accepted but is also used to back out items previously received. Backing out items may be necessary to: 1) denote return item(s) to the vendor or, 2) position the requisition to allow for a change to Quantity and/or Unit price.
PROCESSING RECEIPTS

1. After finding the order number*, click the Receive link on the eVA eMail ‘My Home’ page.

   ![Image of eVA eMail interface]

   NOTE: If you are a desktop receiver, and your name appears in the ‘on behalf of’ field of the requisition, you can access receiving by clicking the RECEIVE button when you open the requisition.

2. Enter the desired ID in the Search field: OrderID, ReqID, or ReceiptID.

   If desired, you can also click the Advanced option to choose other filters for receipts, such as Supplier, Order Title, Requisition Preparer or Requester.

   ![Image of advanced search options]

3. When below screen appears, take the appropriate action:
   a. To receive all items on the order, click the ‘Accept All’ button.
b. To record partial receiving, enter the quantity in the Accept/Return field.

**NOTE:** If the item/service was received prior to the current date, enter the correct date received, as shown below.

It’s possible to see lines on an order with different receiving methods: Quantity and Amount. The below screen illustrates this scenario:
4. If an item is received damaged, or should not have been sent by the vendor, the receiver should always, upon immediate receipt of item(s),

   a. denote the quantity to be rejected in the REJECT field, as shown below. **NOTE: This field should NEVER be used to record a ‘return’ after the product or service has been received on a prior receipt. If this was mistakenly done, back out the erroneous quantity in the Reject field (i.e.-5) after erroneous receipt has processed.**

   ![Image of receipt with reject field]

   b. then enter a Rejection reason, as noted below.

   ![Image of receipt with rejection reason]

5. If needed, additional information can be added (Step 4; above screen). Otherwise, proceed to the Summary screen.
6. Review the Summary screen to ensure accuracy.

7. If desired, an additional approver can be added to the receipt by clicking the 'Add Approver' on the Approval Tab. (See important information in the 'Approving Receipts' section of this document).

NOTE: The Close Order field defaults to the 'Yes' button. Leave as is.

8. When the receipt is complete, click the Submit button.

9. Based on your default Preference setup, after clicking Submit button, you will see this screen,

... or you will see this screen.
Let's look at the receipt audit trail!
The requisition will be in one of two statuses: If partial receiving was done, the requisition will be in Receiving status. If all items were received, the requisition status will be in Received status.

When reviewing the receipt tab for this example, the newly processed receipt appears, as well as a NEW receipt in composing status.

**NOTE:** For partially received orders, the system creates a new composing receipt in preparation for additional receiving.

**APPROVING RECEIPTS**

There are no required approvals for receipts unless a receiver enters an approver. If the receiver inserts an approver in the workflow before the box showing the regular receiver, that approver can only find the receipt after it's submitted by going into the RECEIVE screen and searching for the order. If, however, the receiver inserts the approver after the regular receiver, the receipt (RC) will appear in the 'To Do' pane of the eMail home screen. An email notification is NOT sent to the receiver stating an order is ready to be received. The only approver to receive a notification will be one added to the workflow that falls AFTER the regular receiver.
REOPENING CLOSED ORDERS

Once closed, it will be necessary to REOPEN an order so change(s) can be processed for the associated eVA requisition.

1. Click the Receive link on the eVA eMail 'My Home' page.

2. When the below screen appears, enter the order number in the Search field, as shown. If the order number is unknown, a Requisition number (ReqID) or Receipt number (Receipt ID) can be entered by accessing the drop- down menu to select an alternate search type. (Ignore Contract ID)
3. When the applicable screen appears, click the 'Reopen Order' button.

4. Take the below action according to your situation:
   a. If you reopened the order to reduce the quantity/amount on a requisition line item(s) below the quantity/amount already received,
      (1) Click the RC ID# that appears in Composing status.
      (2) Enter the adjusted negative receiving on the applicable line(s). 
         NOTE: If items must be re-received after the changed requisition is approved, make a note of the original RECEIVED date of each line.
         Ensure the Close Order button is set to 'No'.
(3) Click the Submit button. 
*This action will place the order and requisition in Receiving status.*

b. If you must reopen the order to allow for non-item related changes to the associated requisition (e.g. accounting codes, title, PO Category, etc..) click the EXIT button after clicking the Reopen Order button.

You will be returned to the eMail HOME screen where the requisition associated with the reopened order can be found in Receiving status-awaiting necessary revisions.

When the PR# is clicked, the Change button will be viewable on the PR.

![Search Results](image)

If necessary to re-receive the item(s) after the changed requisition has been fully approved, go back into Receiving and process the receipt, making sure to enter the original receiving date(s).

**Note:**

If an attempt is made to process a new composing RECEIPT too soon after an RC has been submitted, the below screen may appear. Wait at least 15-20 minutes before Reopening the order and Exiting.

![Confirm Exit](image)
IMPORTANT RECEIVING INFORMATION

BSO is a term used to designate the unit/division/department associated with an eVA user’s account. The receiving process can be either Central Receiving or Desktop receiving (receiving completed by the requestor), based on the requestor’s BSO. If the BSO has Central Receiving for receiving, anyone assigned to the Central Receiving role can receive against orders initiated by requesters within that BSO. It’s important to understand that the initial receipt is created at the time the order is created and will use the BSO setting for receiving at that time. If the receiving field of the BSO is changed from Central Receiving to Desktop receiving (or vice versa), and a partial receipt is processed after the BSO change, the next receipt (in composing status), will require that receiving be done by the NEW receiver. This situation could also occur if the requester is moved to a different BSO with different receiving setup.

REMEMBER: Whatever the receiving field reflects on the BSO for that requester at the time of receipt creation will necessitate that type of receiving for the receipt(s); either Central Receiving or Desktop.*

*HELPFUL HINT: If the BSO receiving field was switched from Desktop to Central Receiving, the requester can be inserted in the applicable Central Receiving role to complete receiving.

The same Central Receiving role can be assigned to multiple BSO’s.

After a requisition is submitted, a Receipts tab appears as one of the Tabs on the requisition. NOTE: The Requisition History tab does not contain date/time details for receipts; the Receipts tab does.

The receiving method (quantity or amount), is determined by selection made by the requisition preparer on the line item(s). The default is quantity. If this option is not available, consult your eVA Entity lead or DPS Account Executive.

A receipt could potentially have a mix of receiving methods. Some items may be designated for receiving by Quantity, while other items might specify receiving by Amount.

All quantities/amounts that must be backed out on a receipt should be entered as a negative number in the Accept/Return field. (e.g. -10 or -$300.00).

COMMON MISTAKE! Do NOT enter a quantity/amount in the REJECT field if that item has already been recorded as RECEIVED on a prior receipt.

Processed receipts will show the new/adjusted quantity or amount in the "Prev. Total" field.

A PR can be cancelled if ALL items previously received on the PR are completely backed out.

CAUTION: If multiple orders to different vendors exist on the same requisition, canceling the requisition will cancel ALL orders associated with the requisition. Instead, create a change to decrease the quantity on the applicable line item(s) to zero (0).

To accurately process a change to a requisition, the order associated with the change must first be reopened, and, if applicable, receiving BACKED out. Even if all receiving is backed out, the below changes cannot be done on a requisition if it is greater than version 2 requisition (vs2).
- Supplier name and/or supplier location
- Method of payment (changing from a pcard to invoice OR vice versa)
- Billing address
- Order delivery (Print to Electronic or vice versa)

To process a PRICE change on a non-catalog item previously received, it will be necessary to back out quantities/amount previously received by doing negative receiving on the item(s).

Receivers are discouraged from closing an order short. (Clicking the close button.) An adjustment should be made to the requisition if the item(s) will not be delivered or replaced. If a change requisition is processed to reflect a quantity that equals the total adjusted received quantity/amount, the PR will automatically move to Received status.

Once any receiving is processed, the requisition will never revert back to Ordered status, even if all items are backed out of receiving.

If applicable, re-receive items after a changed requisition is fully approved. NOTE: Past receipts will provide receive date(s).

There is no concept of ‘Delegating your Receiving Authority’. No role or action will allow anyone other than the authorized receiver (requester [aka desktop] or Central Receiver) to receive the order.

If an EDIT button displays after clicking the Receipt#, it could mean one of two things: the user is not the official receiver yet has an ‘eVA-EditApprovable’ role that allows them to edit the receipt (check Approval Tab to view authorized receiver), OR it the appropriate receiver is viewing the receipt by clicking through the requisition, then onto to the Receipt tab, and choosing a receipt. (This option allows the requester to view a receipt without being put into the receiving mode where receiving is expected.) NOTE: If an unauthorized person edits a receipt, that receipt will NOT process until the authorized receiver goes into Receive module, pulls up that receipt, and clicks Submit!

Refer to the Report and Resource Center for helpful receiving reports.

There are a number of ways to determine orders that are still outstanding.

You can choose a variety of reports (e.g. 200, 201, 202, 208) and select the status of ‘Ordered’ and/or ‘Receiving’ for a past time period to view which orders have not yet been fully received.

For Accounts Payable personnel, the 211 Order Receiving Details report can prove especially helpful for viewing what receipts have processed within a designated time period. In addition, a specific receipt can also be opened and printed from this report!

The 203 View or Print Orders(s) Report provides detail information such as line item descriptions, approvers and approval dates, receiving details, and accounting code distribution.
Welcome to eVA

Buyer Reports

Vendor Data
100 Vendor Data by NIGP Code
101 General Vendor Information
102 Vendor Location for Specific Order
1010 Vendor Active Ordering Location Address CP

Spend Analysis
200 Order Details with Accounting/Receiving
201 Order Totals - No Accounting
202 General Order Information
203 View or Print Order(s)
204 Spend by NIGP Class
205 Spend Summary-Registered vs. Non-Registered Vendors
206 Spend Totals with SWAM Breakout
207 Total Vendor Spend by BSO
208 Order Line Item Details
209 SWAM Vendor Summary with FY Totals

210 Spend by User for Time Period
211 Order Receiving Details

212 Total Order Count and Spend Summary
213 Top Vendor List
215 Orders Created with Vendor as Un-Registered
216 Services Spend by Vendor

Approver Analysis
300 Approval Cycle Time on eVA Requisitions