Receiving for Non-Assets

This job aid describes how to receive non-assets. It is intended for requisition preparers who are responsible for receiving in EFS.

Log in to MyU (myu.umn.edu). Navigate to: Key Links > PeopleSoft > EFS/Finance.

Navigate in EFS Finance: eProcurement > Manage Requisitions.

1. Populate search criteria to locate the requisition/PO against which you want to receive items.

   a. Clearing the Date From field will allow you to see requisitions older than one week.
   
   b. The Requester field defaults with your user ID. This only allows you to see requisitions for which you were indicated as the requester. Clear the field or enter the Internet ID of another user to see requisitions you are authorized to receive against.
   
   c. The requisition number may be entered in the Requisition ID field, or the PO number may be entered in the PO ID field.

2. Click <Search>.

3. Select “Receive” from the Select Action drop-down menu for the requisition/PO line for which you want to receive items.

4. Click <Go>.

5. Select the appropriate checkbox(es) corresponding to the line(s) that are being received.

6. Click <Receive Selected>.

7. Click the details icon to verify the PO matches the packing slip or invoice. To return to the previous page, click <Return to Previous Page>.

8. Either the Received Amount field (e.g., blanket orders or CPS’s) or the Received Qty field will be open. Change the defaulted amount or quantity to the amount or quantity that was physically received.

9. Click <Save Receipt>.