



# **Desktop Receiving of ePro Items by Department**

**Version Date: December 6, 2021**

**Training Guide  
of ePro Items by Department**

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## Desktop Receiving of ePro Items by Department

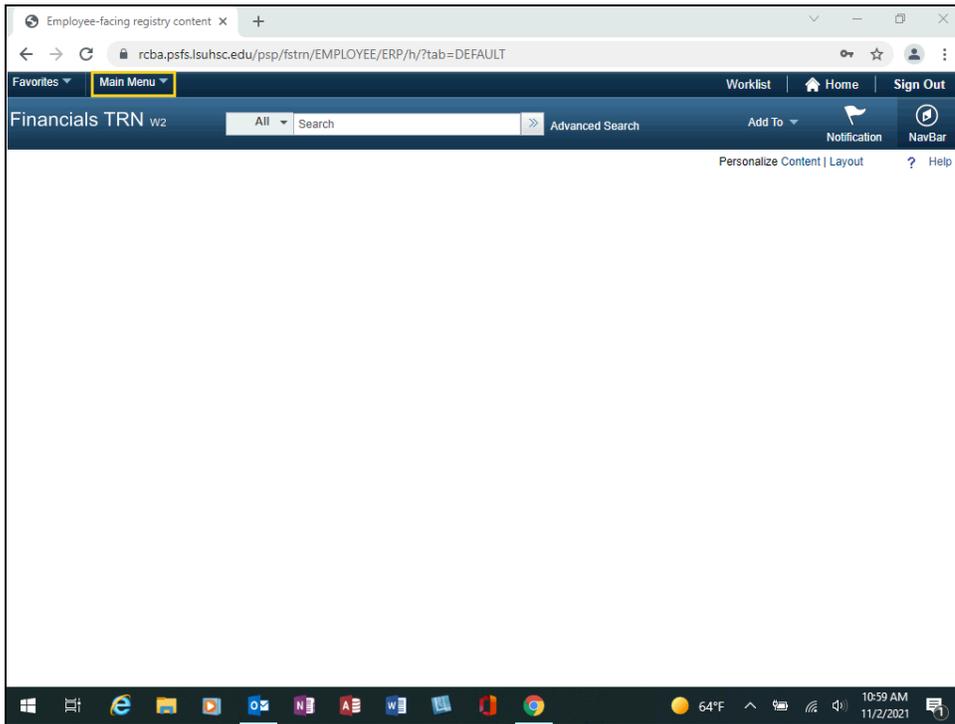
### Receive ePro Goods in the Department

#### Procedure

In this topic you will learn how to [Receive ePro Goods in the Department](#).

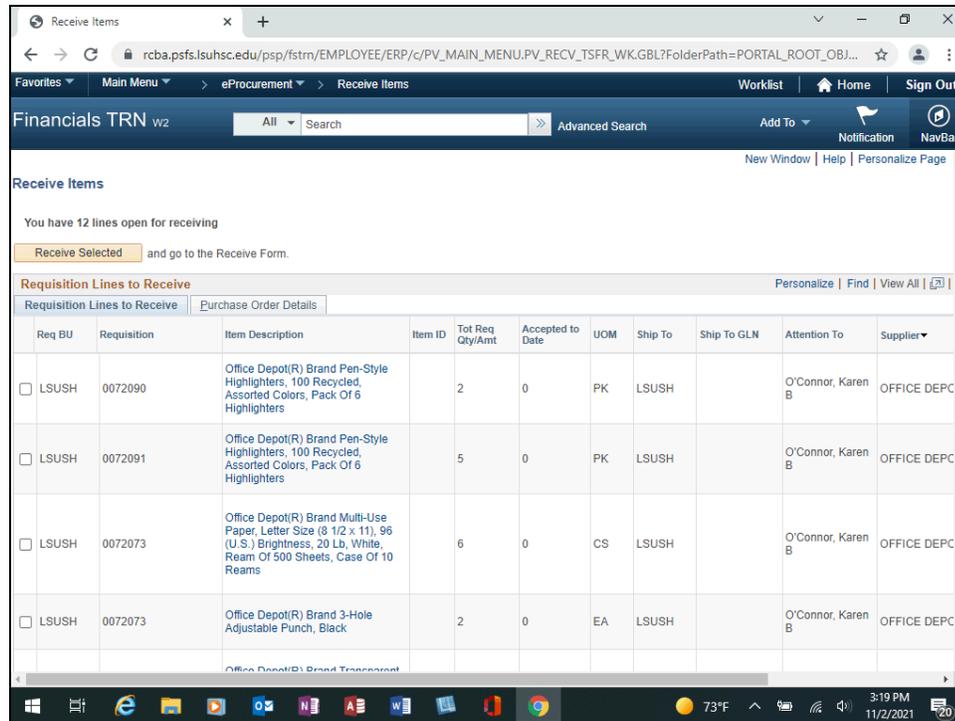
Step	Action
1.	<i>NOTE: Currently desktop receipts are only to be created for Office Depot Purchase Orders unless otherwise directed by the Procurement Team, and, receipts may only be created for <u>one</u> purchase order at a time.</i>
2.	Desktop receiving is a feature in the eProcurement module that allows the department requester to enter receipts into the system for goods received directly in the department. <i>For goods delivered through Central Receiving, the current procedure will continue to remain in place.</i>
3.	Office Depot is the first supplier for which Desktop Receipts will be available. <i>Users will enter the receipt and attach a scanned/signed copy of the packing slip as record of the receipt.</i>

# Training Guide of ePro Items by Department



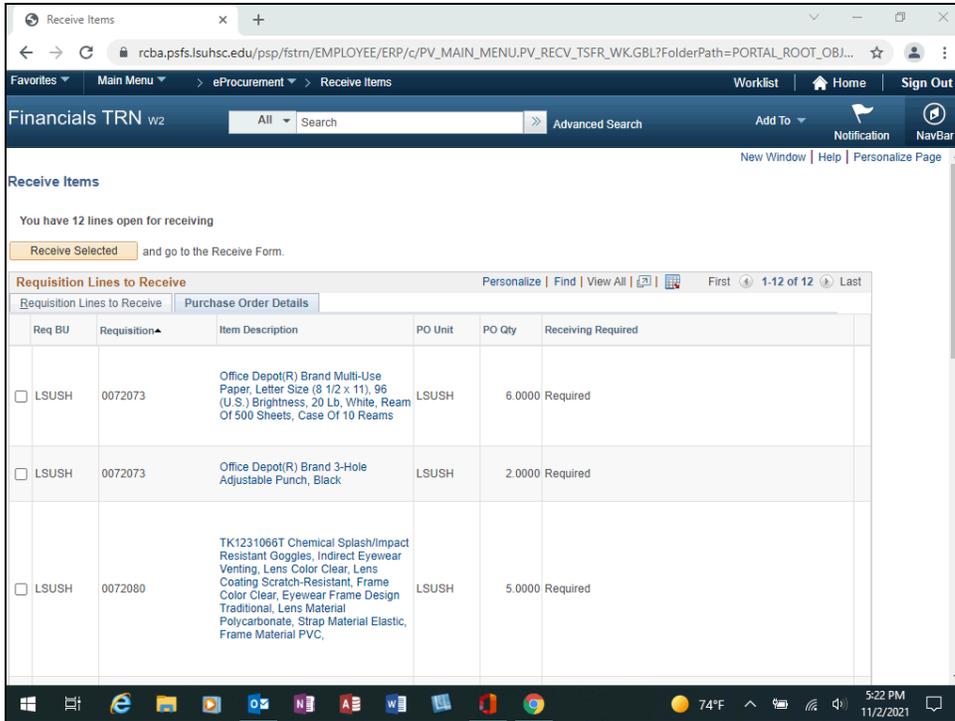
Step	Action
4.	Click the <b>Main Menu</b> button. 
5.	Click the <b>eProcurement</b> menu. 
6.	Click the <b>Receive Items</b> menu. 

# Training Guide of ePro Items by Department



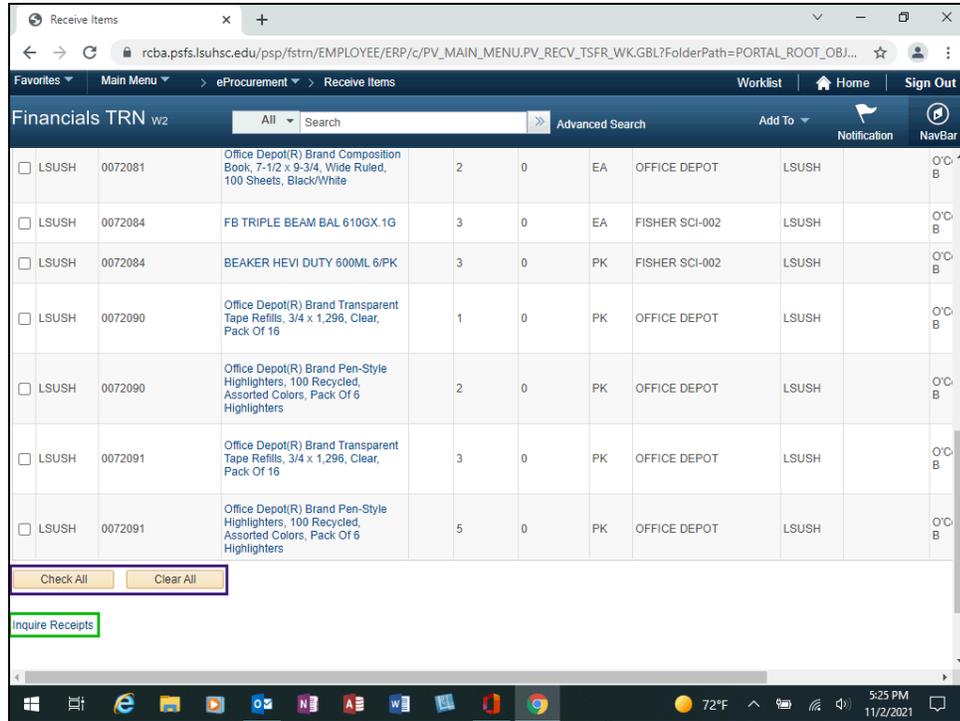
Step	Action
7.	The landing page displays all of the items for which the requester/department receiver has the ability to receive. The items may represent one or more purchase orders. Items may <u>not</u> list consecutively if purchase order has multiple items.
8.	<p>At the top left of the page, the system notes the number of lines that the requester has available to receive. Only requisitions with lines marked as receiving required are displayed. The yellow <b>Receive Selected</b> button allows users to receive goods for the lines selected from the grid.</p> <p><b><i>IMPORTANT NOTE: The list will include purchase orders other than those for Office Depot. At the time, only Office Depot purchase orders will be received in Desktop Receiving.</i></b></p>
9.	<p>The grid contains two tabs: <i>Requisition Lines to Receive</i> and <i>Purchase Order Details</i>.</p> <p>On the <b><i>Requisition Lines to Receive</i></b> tab, the grid displays each line by the Business Unit ID, the requisition number/name, the line details, the quantity ordered, quantity received to date, unit of measure, the Ship To ID, Attention To, and the supplier id if available.</p>

# Training Guide of ePro Items by Department



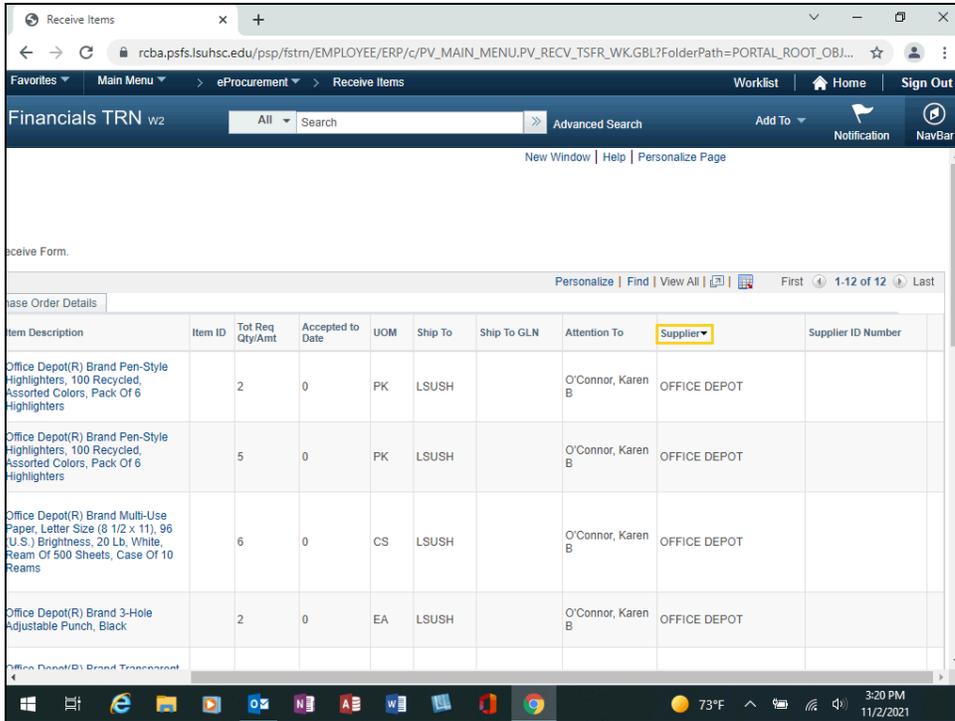
Step	Action
10.	On the <i>Purchase Order Details</i> tab, the business unit, requisition number/name, and the item details from the first tab display along with the PO Quantity, PO Business Unit, and the Receiving Required indicator.

# Training Guide of ePro Items by Department



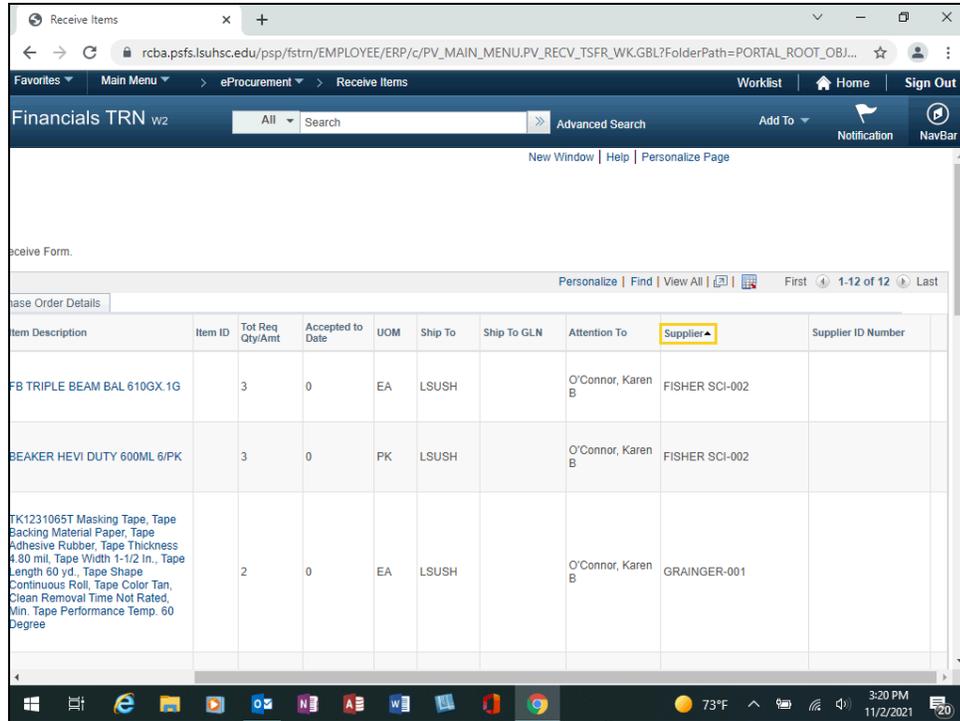
Step	Action
11.	Scrolling to the bottom of the Receiving Items page, there are yellow buttons to "Clear All" and "Clear All" as well as a link to <b>Inquire on Receipts</b> .
12.	<p>In the display, the default sort order is by PO schedule description. Users can sort by supplier or any of the other columns.</p> <p>In this exercise, you will sort by supplier and then return to original order.</p> <p>Click the <b>Right</b> scrollbar.</p> 

# Training Guide of ePro Items by Department



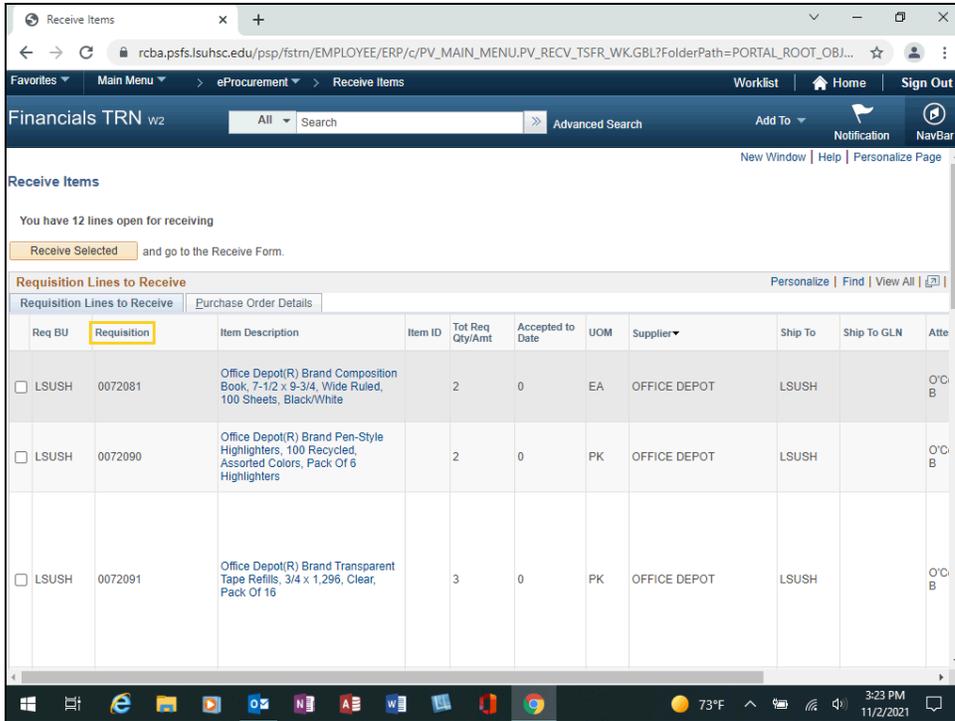
Step	Action
13.	<p>Click the <b>Supplier</b> column header.</p> <p><i>NOTE: This will change the requisition sort order to alphabetical.</i></p> 

# Training Guide of ePro Items by Department



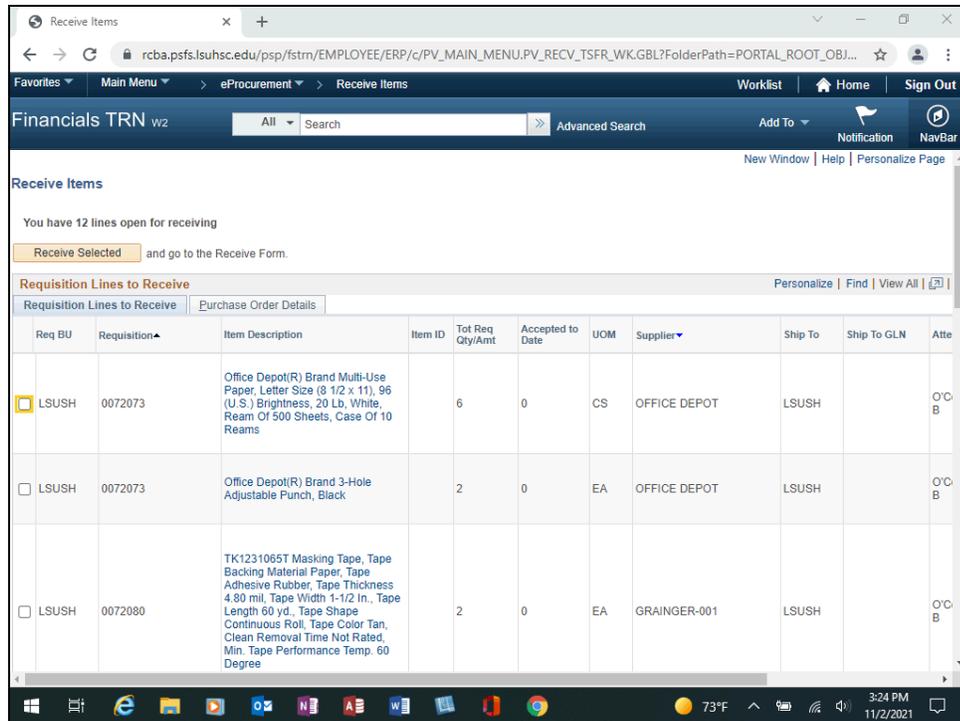
Step	Action
14.	<p>Click the <b>Supplier</b> column header.</p> <p><i>NOTE: This will return the requisitions to their original sort order.</i></p> 
15.	<p>Click the <b>Left</b> scrollbar.</p> 

# Training Guide of ePro Items by Department



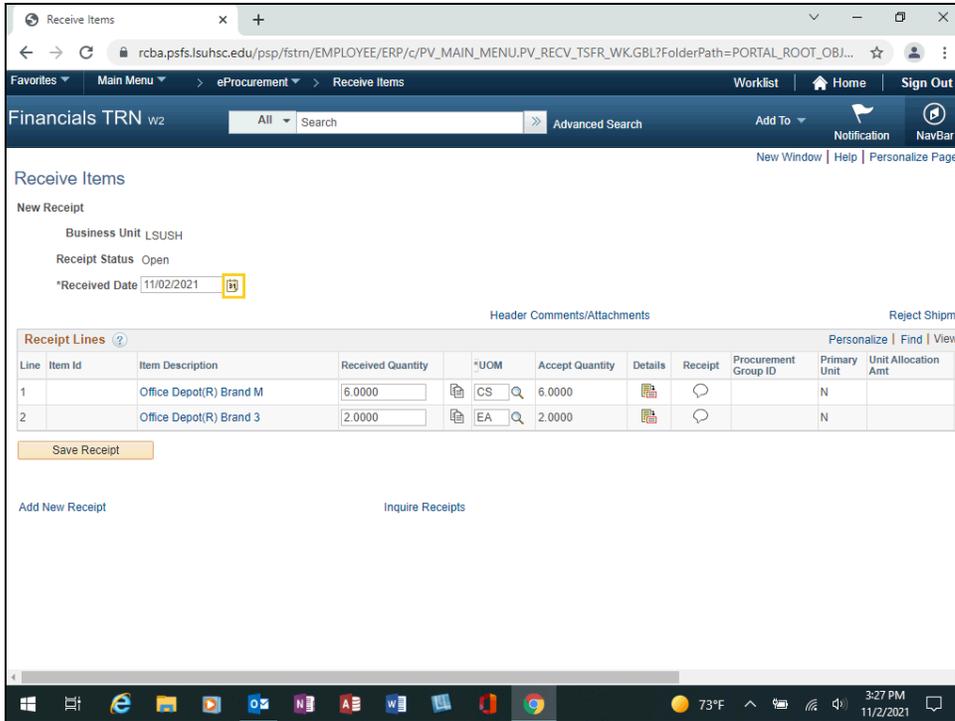
Step	Action
16.	<p>Requisitions are sorted by Item Description, meaning that all lines of the requisition are not grouped consecutively. Selecting the Requisition column header sorts the data by requisition number, thus sorting requisition lines consecutively.</p> <p>Click the <b>Requisition</b> column header.</p> <p><b>Requisition</b></p>

# Training Guide of ePro Items by Department



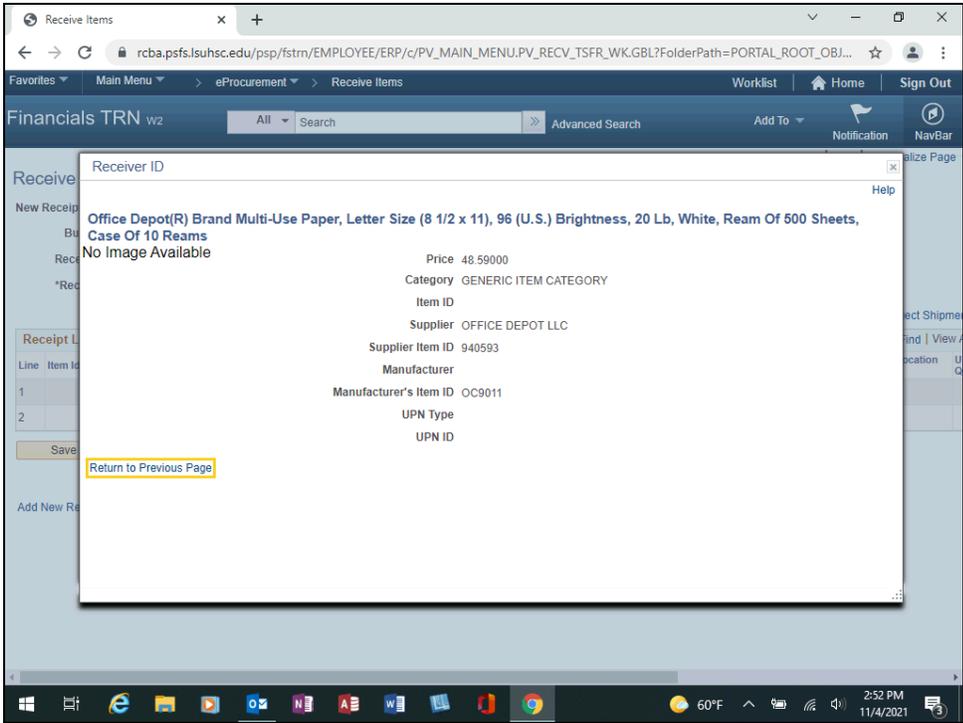
Step	Action
17.	In this exercise, users will select items from requisition 0072073 to receive.  Click the <b>0072073 - Line 1</b> option. <input type="checkbox"/>
18.	Click the <b>0072073 - Line 2</b> option. <input type="checkbox"/>
19.	Click the <b>Receive Selected</b> button. <input type="button" value="Receive Selected"/>

# Training Guide of ePro Items by Department



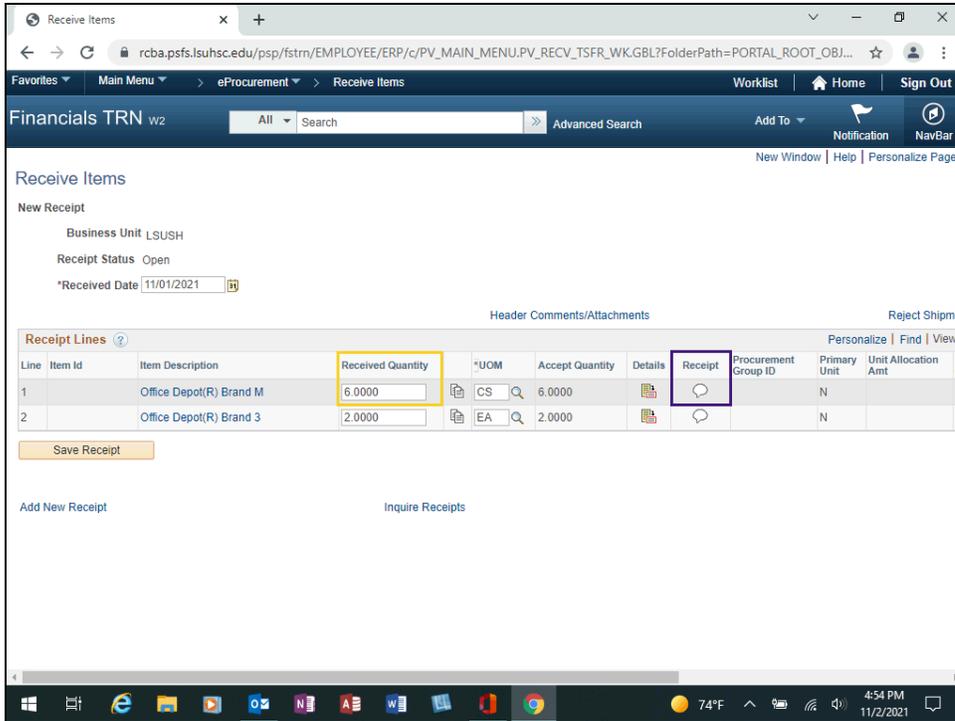
Step	Action
20.	<p>The <b>Receive Items</b> page includes several defaults such as the <i>Business Unit</i> and the <i>Receipt Status</i> of <u>Open</u>. The current date defaults into the <i>Received Date</i>.</p> <p><b>NOTE: Users will enter the actual date items are received by the department, not the date the items are being entered into PeopleSoft.</b></p> <p>Click the <b>Calendar Received Date</b> button.</p> 
21.	<p>Click the <b>1st</b> date/time field.</p> 
22.	<p>In the grid displaying the lines selected from the previous screen, the <i>Item Description</i> defaults. The Item Description field is limited to 30 characters, so it may be challenging to determine which line information you are receiving. By clicking on the Item Description for a specific line, users will be able to view the entire Item Description.</p> <p>Click the <b>Line 1 Item Description</b> link.</p> 

# Training Guide of ePro Items by Department



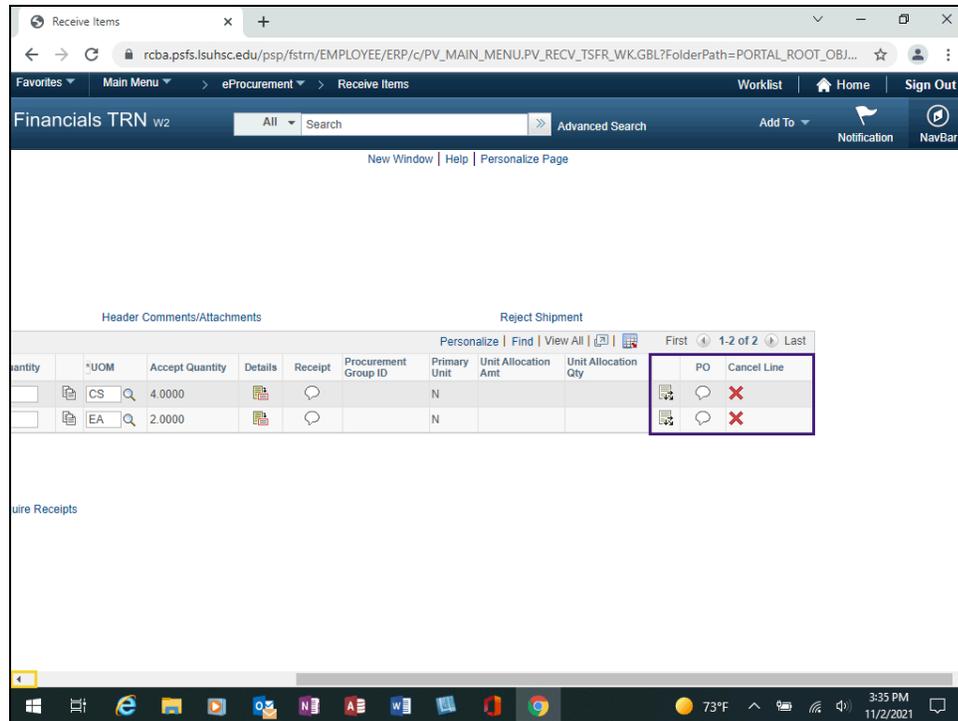
Step	Action
23.	<p>The complete item description displays.</p> <p>Click the <b>Return to Previous Page</b> link.</p> <p><a href="#">Return to Previous Page</a></p>

# Training Guide of ePro Items by Department



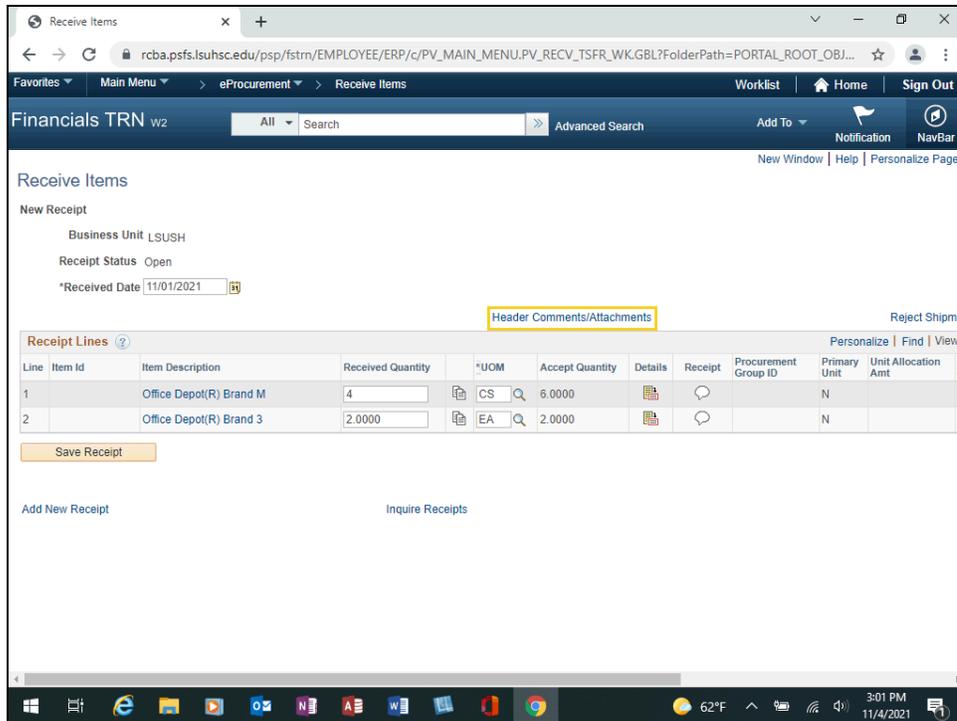
Step	Action
24.	<p>The <i>Received Quantity</i> defaults to the quantity ordered. If the amount <u>actually</u> received is different, users will enter the quantity <u>actually</u> received. If desired, you may enter comments for a particular line. If desired, users may enter comments for a particular line. <i>Repeat for each line to be received.</i></p> <p>Enter the desired information into the <b>Received Quantity</b> field. Enter "4".</p>
25.	<p>Click the <b>Right</b> scrollbar.</p> 

# Training Guide of ePro Items by Department



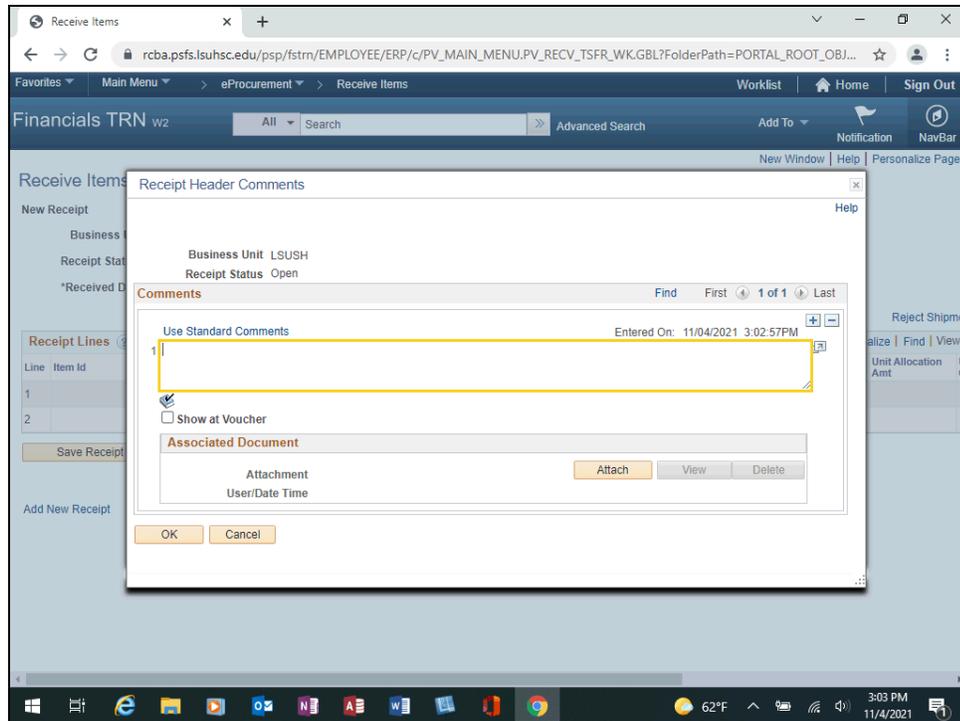
Step	Action
26.	<p>The <i>Distribution</i>, <i>PO Comments</i> and <i>Cancel Line</i> icons appear at the end of each line. Users may select the red <b>X</b> under <i>Cancel Line</i> to cancel a particular line if the item will not be received (i.e., item has been discontinued)</p> <p>Click the <b>Left</b> scrollbar.</p> 

# Training Guide of ePro Items by Department



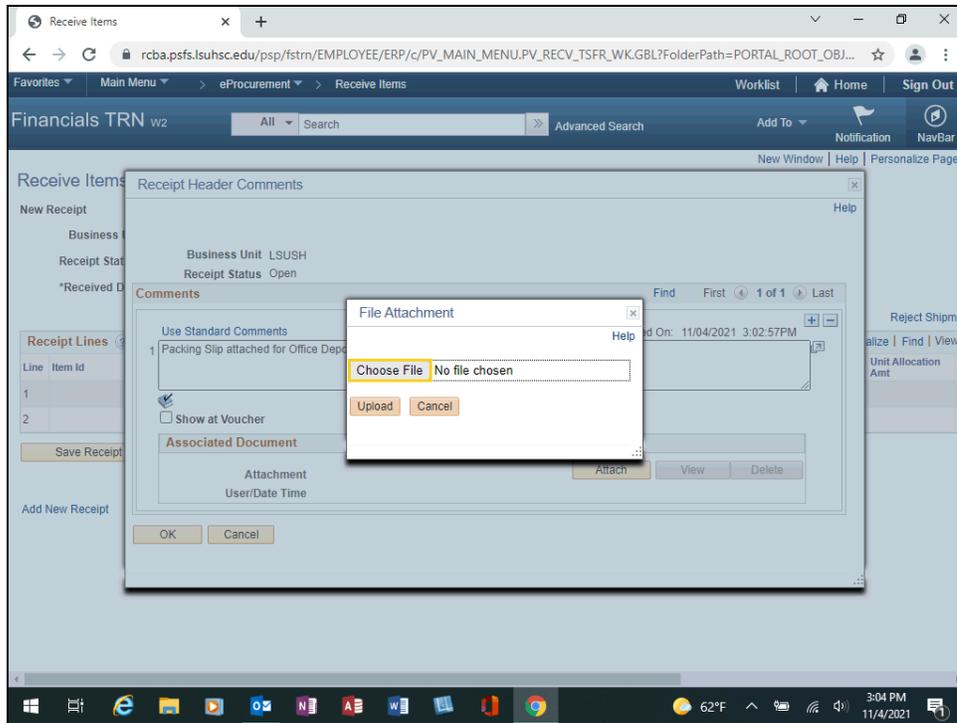
Step	Action
27.	Click the <b>Header Comments/Attachments</b> link. <b>Header Comments/Attachments</b>

# Training Guide of ePro Items by Department



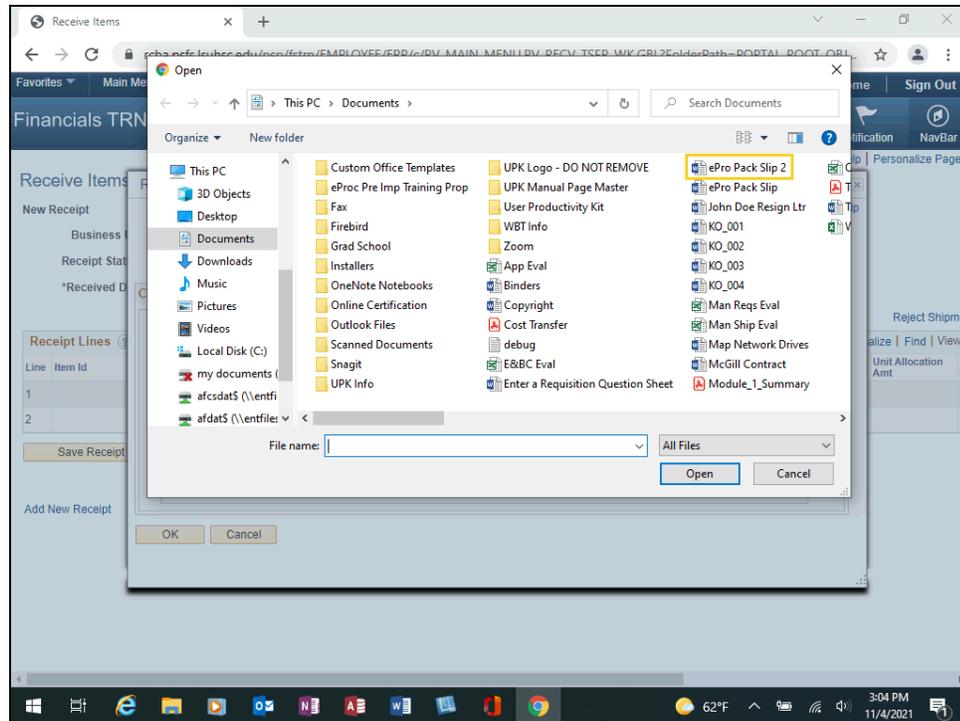
Step	Action
28.	<p>In the <b>Use Standard Comments</b> box, enter comments such as name of the person who signed for the goods and the date the goods were received.</p> <p>Enter the desired information into the <b>Use Standard Comments</b> field. Enter "<b>Packing Slip attached for Office Depot order received by KOCONN on 11/1/21.</b>".</p>
29.	<p><i><b>NOTE: The Packing Slip <u>must</u> be signed, dated, and attached to the receipt. All Office Depot orders come with a Packing Slip. If one is not received, contact our Office Depot representative. Currently the Office Depot representative is Lisa Patton, at Lisa.Patton@officedepot.com. Lisa will send a copy of the packing slip to you.</b></i></p> <p>Click the <b>Attach</b> button.</p> <div style="text-align: center;">  </div>

# Training Guide of ePro Items by Department



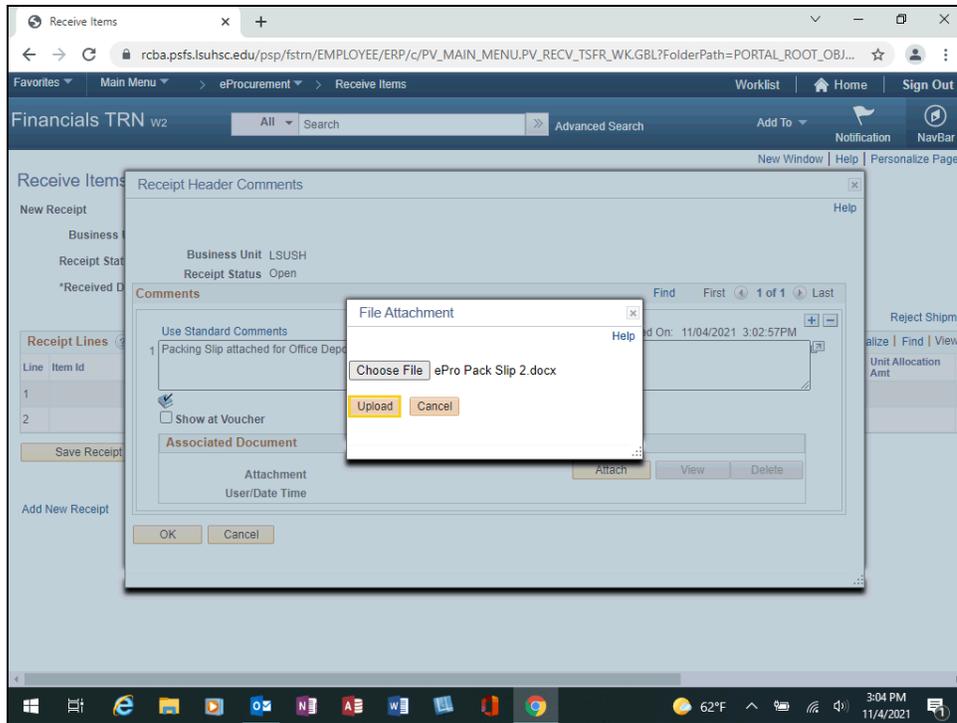
Step	Action
30.	Click the <b>Choose File</b> button. <b>Choose File</b>

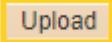
# Training Guide of ePro Items by Department



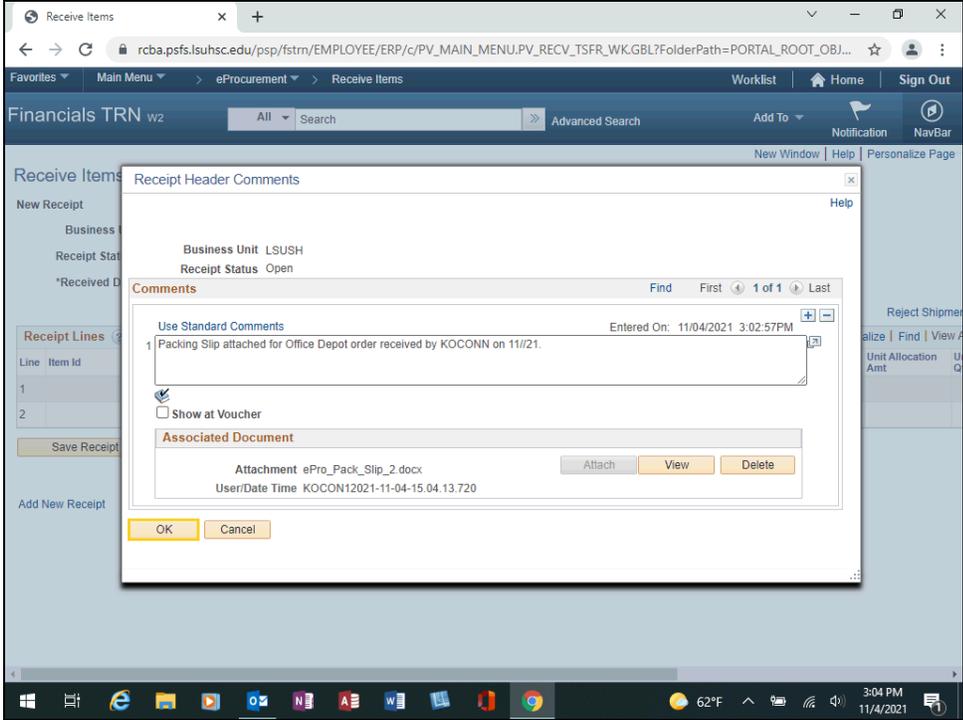
Step	Action
31.	Click the <b>ePro Pack Slip 2</b> list item. 
32.	Click the <b>Open</b> button. 

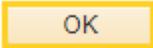
# Training Guide of ePro Items by Department



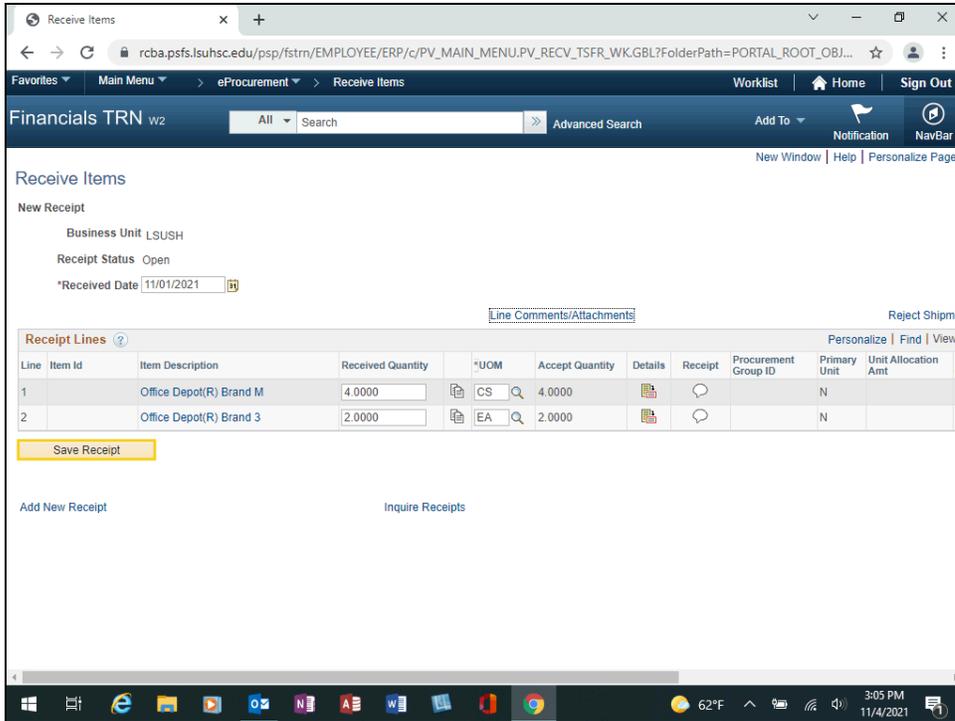
Step	Action
33.	Click the <b>Upload</b> button. 

# Training Guide of ePro Items by Department



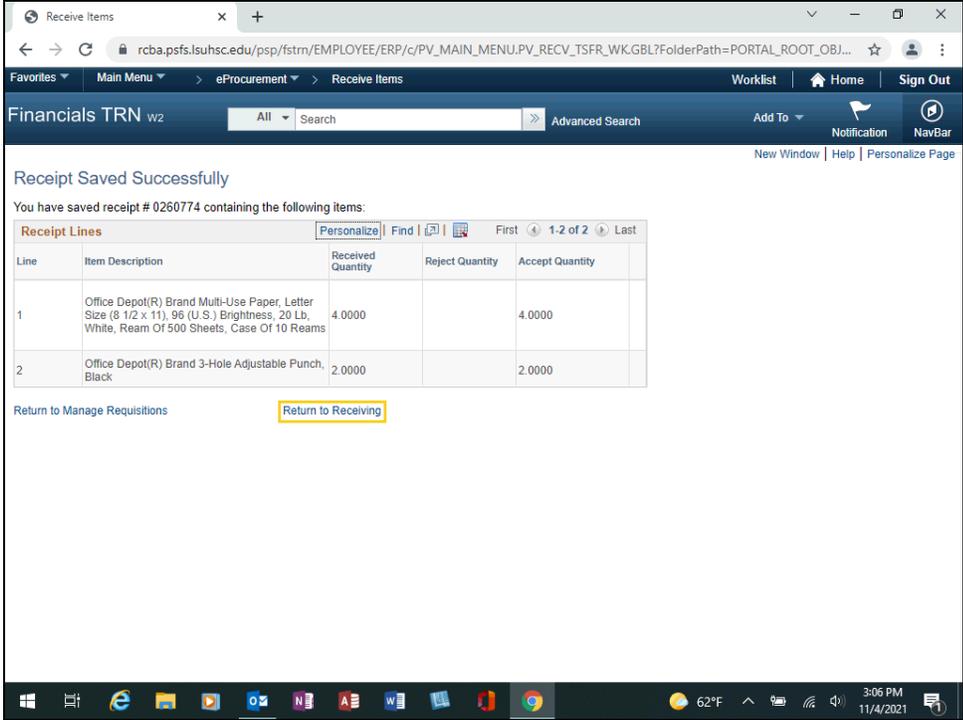
Step	Action
34.	Click the <b>OK</b> button. <div style="text-align: center; margin-top: 10px;">  </div>

# Training Guide of ePro Items by Department



Step	Action
35.	Click the <b>Save Receipt</b> button. <div style="text-align: center; margin-top: 10px;">  </div>

# Training Guide of ePro Items by Department

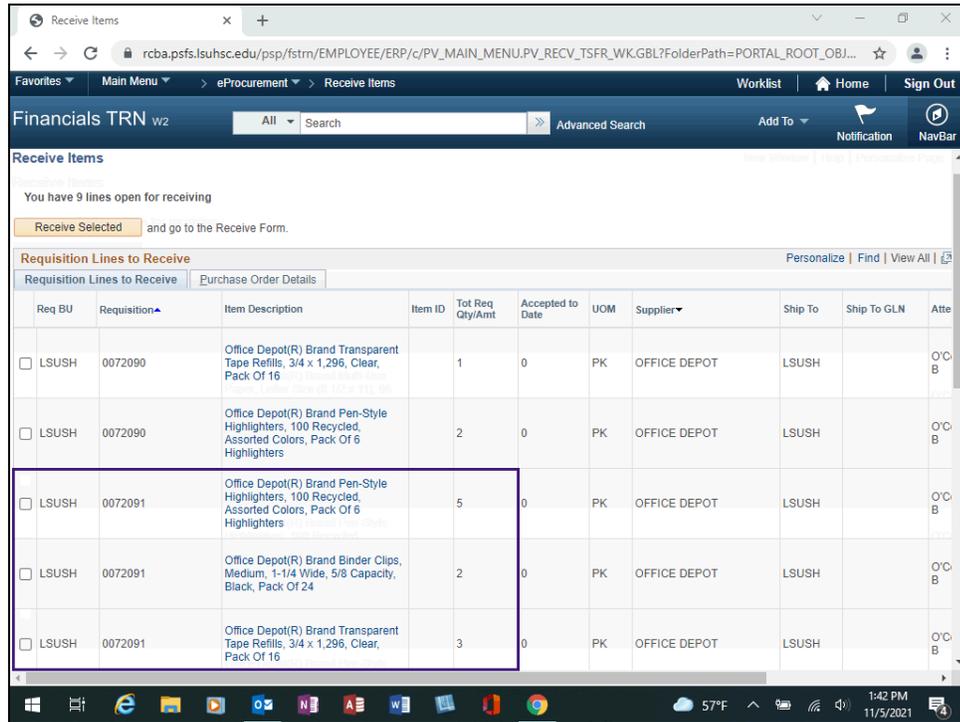


Step	Action
36.	To add another receipt, select the Return to Receiving link.  Click the <b>Return to Receiving</b> link. 
37.	This completes <i>Receive ePro Goods in the Department</i> . <b>End of Procedure.</b>

**Training Guide**  
**of ePro Items by Department**

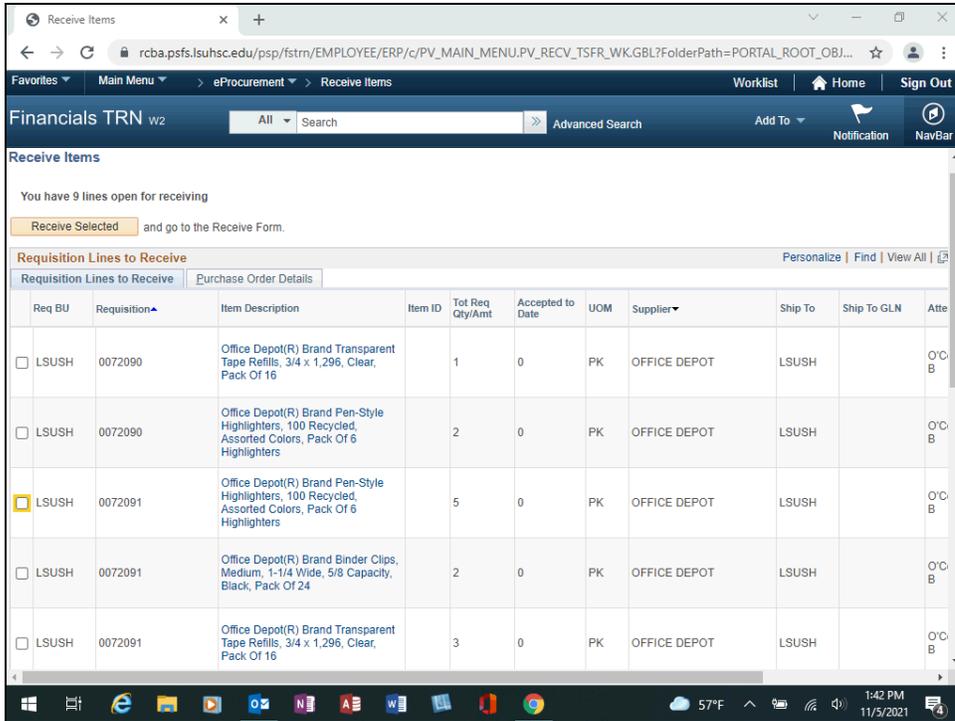
## Reject ePro Goods in the Department Procedure

In this topic you will learn how to **Reject ePro Goods in the Department**.



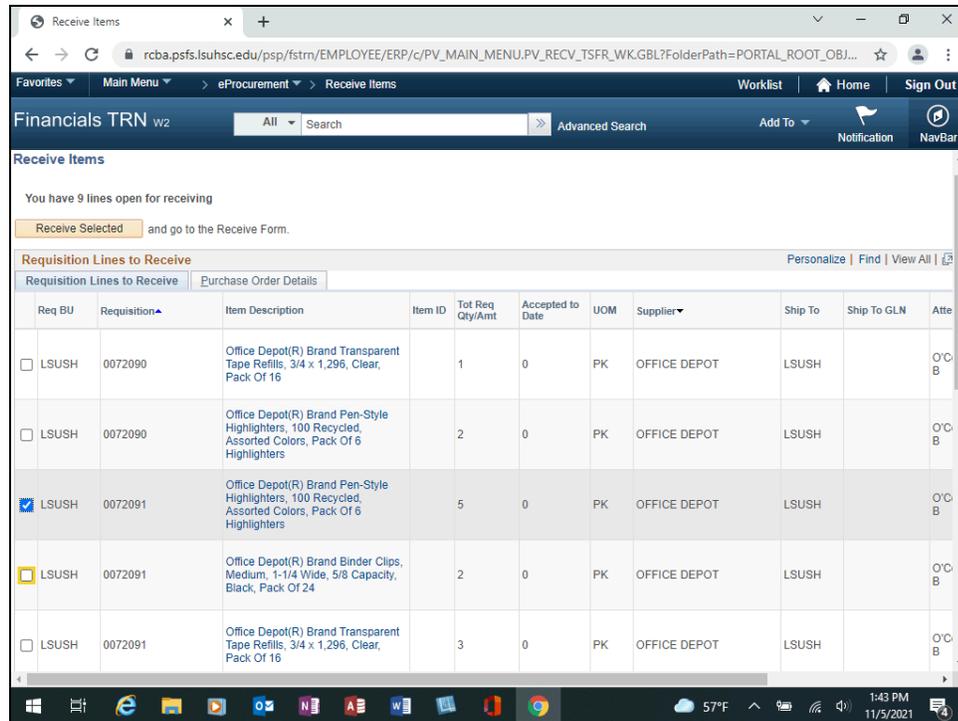
Step	Action
1.	<p>In this exercise, requisition <b>0072091</b> will be used to reject and received items. The requisition has three (3) merchandise lines: one for highlighters, one for binder clips and one for transparent tape.</p> <p>Five (5) packs of highlighters have been ordered. Only three (3) packs will be received. All three (3) packs of tape will be received. The two (2) packs of binder clips will be rejected for being the wrong item and will be returned for replacement.</p>

# Training Guide of ePro Items by Department



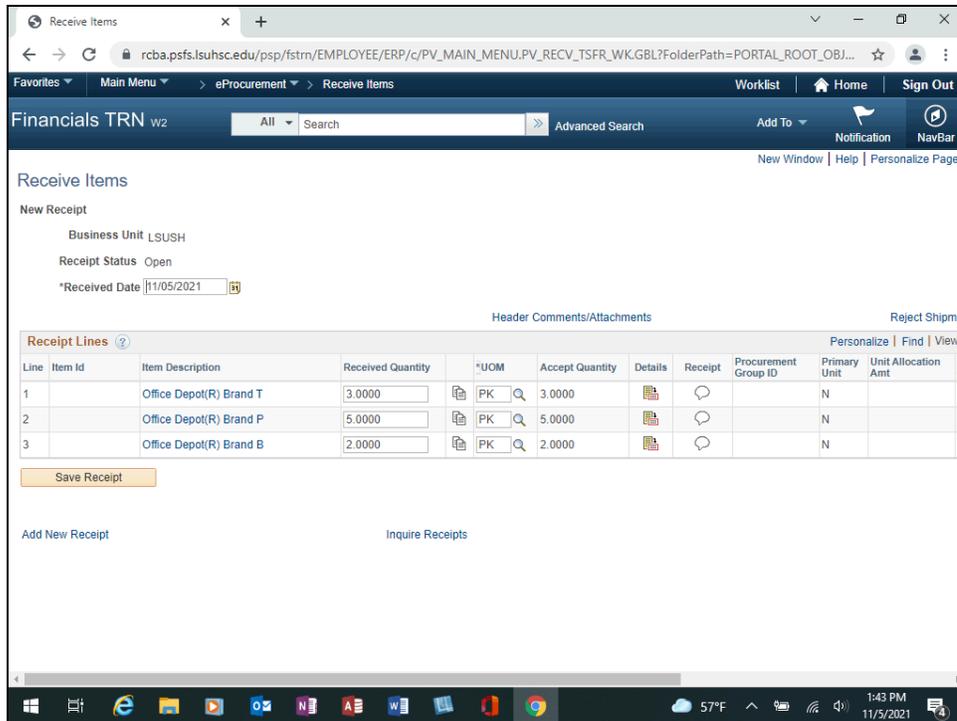
Step	Action
2.	<p>Select all the lines associated with the requisition.</p> <p>Click the <b>Line 1 - 0072091</b> option.</p> 

# Training Guide of ePro Items by Department



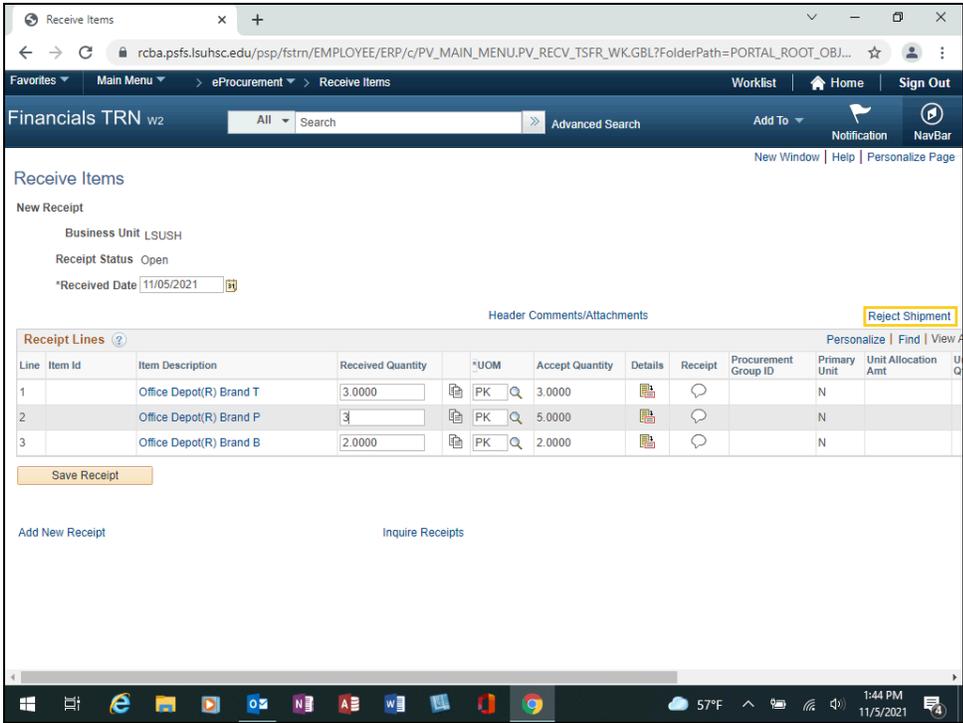
Step	Action
3.	Click the <b>Line 2 - 0072091</b> option. 
4.	Click the <b>Line 3 - 0072091</b> option. 
5.	Click the <b>Receive Selected</b> button. 

# Training Guide of ePro Items by Department



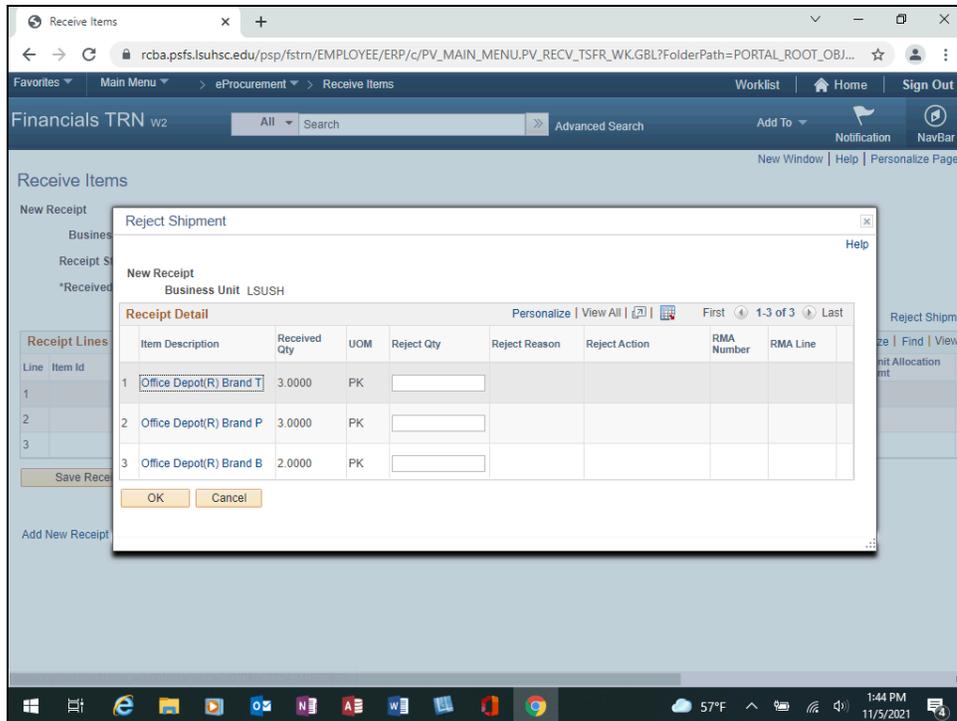
Step	Action
6.	<p>Line 1 is the tape, line 2 is the highlighters and line 3 is the binder clips. All <i>three (3) packs</i> of tape will be received on <i>Line 1</i>, so the <b>Received Quantity</b> will remain as defaulted. You will receive <i>three (3) packs</i> of highlighters on <i>Line 2</i>.</p> <p>Enter the desired information into the <b>Line 2 - Received Quantity</b> field. Enter "<b>3</b>".</p>

# Training Guide of ePro Items by Department



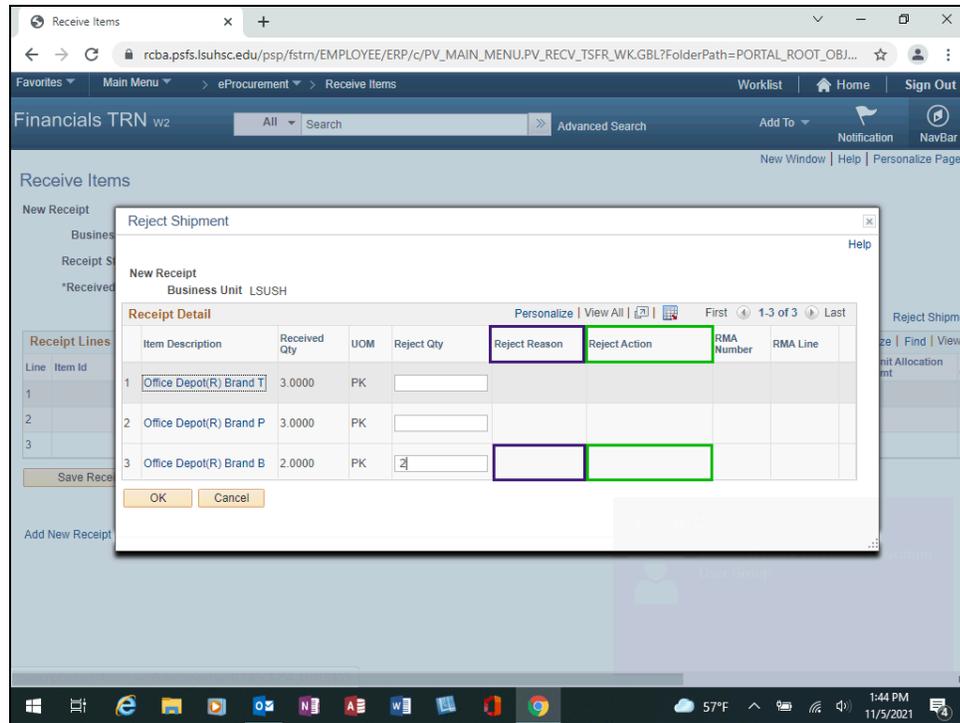
Step	Action
7.	Click the <b>Reject Shipment</b> link. 

# Training Guide of ePro Items by Department



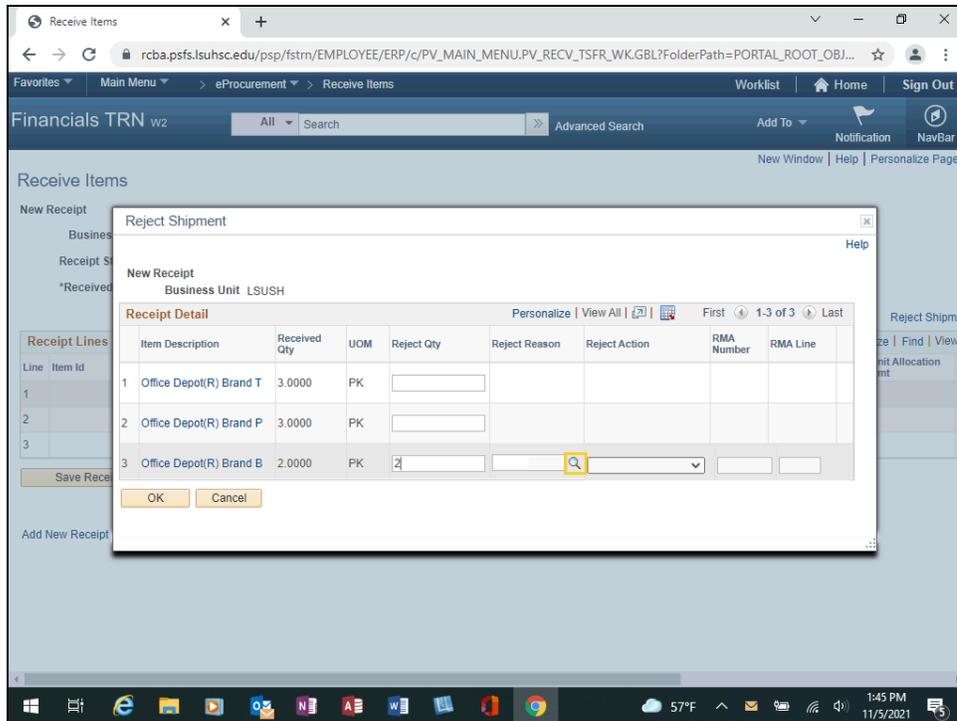
Step	Action
8.	Enter the <b>Reject Qty</b> for Line 3. In this exercise, both packs will be rejected.  Enter the desired information into the <b>Reject Qty</b> field. Enter " <b>2</b> ".

# Training Guide of ePro Items by Department



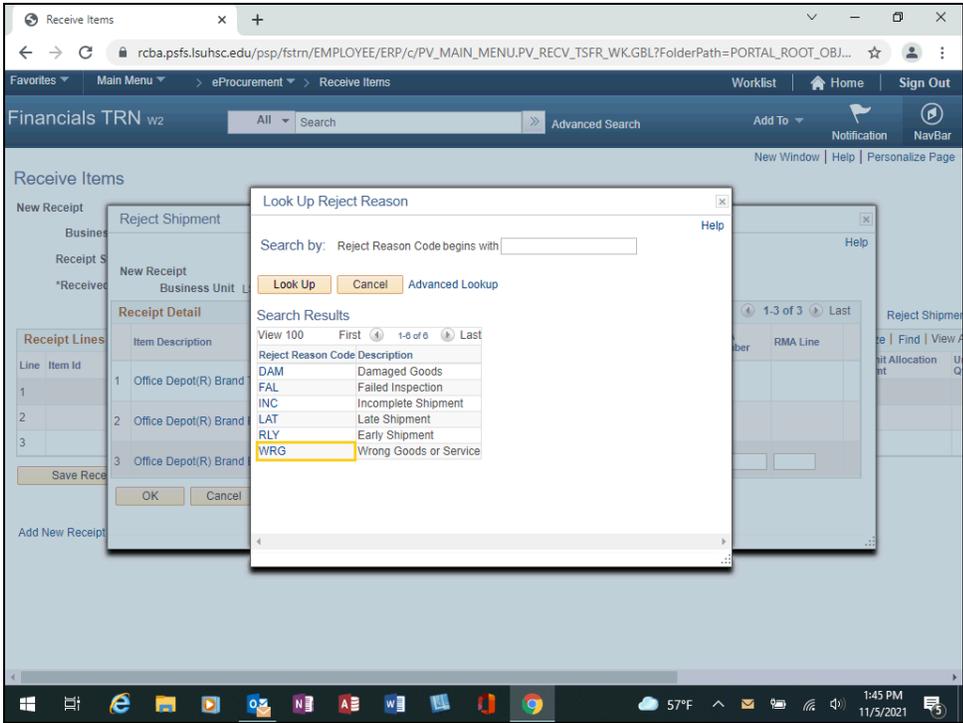
Step	Action
9.	<p>The <b>Reject Reason</b> and <b>Reject Action</b> <u>must</u> also be entered.</p> <p>Press <b>[Tab]</b> key on your keyboard to activate the <b>Reject Reason</b> and <b>Reject Action</b> fields.</p>

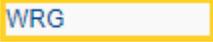
# Training Guide of ePro Items by Department



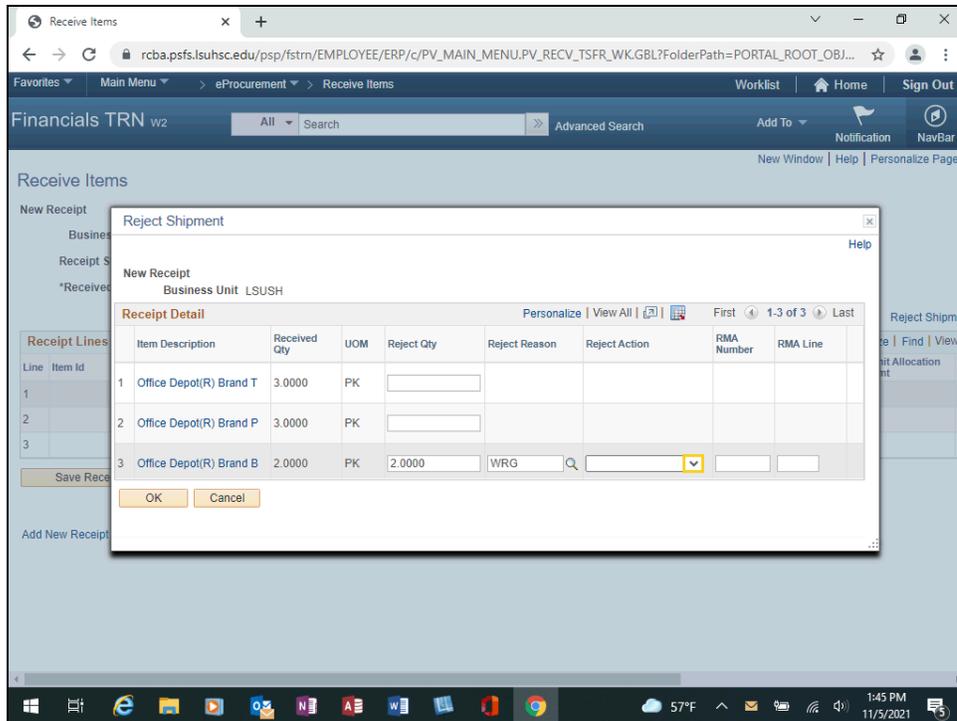
Step	Action
10.	Click the <b>Look up Reject Reason</b> button. 

# Training Guide of ePro Items by Department



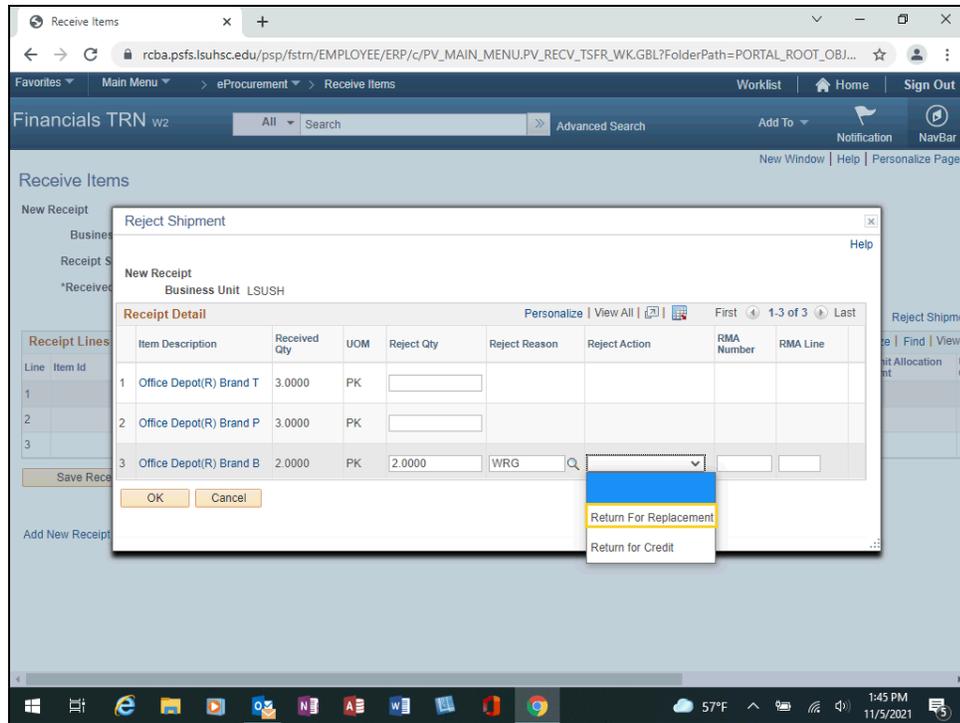
Step	Action
11.	Click the <b>WRG</b> list item. 

# Training Guide of ePro Items by Department



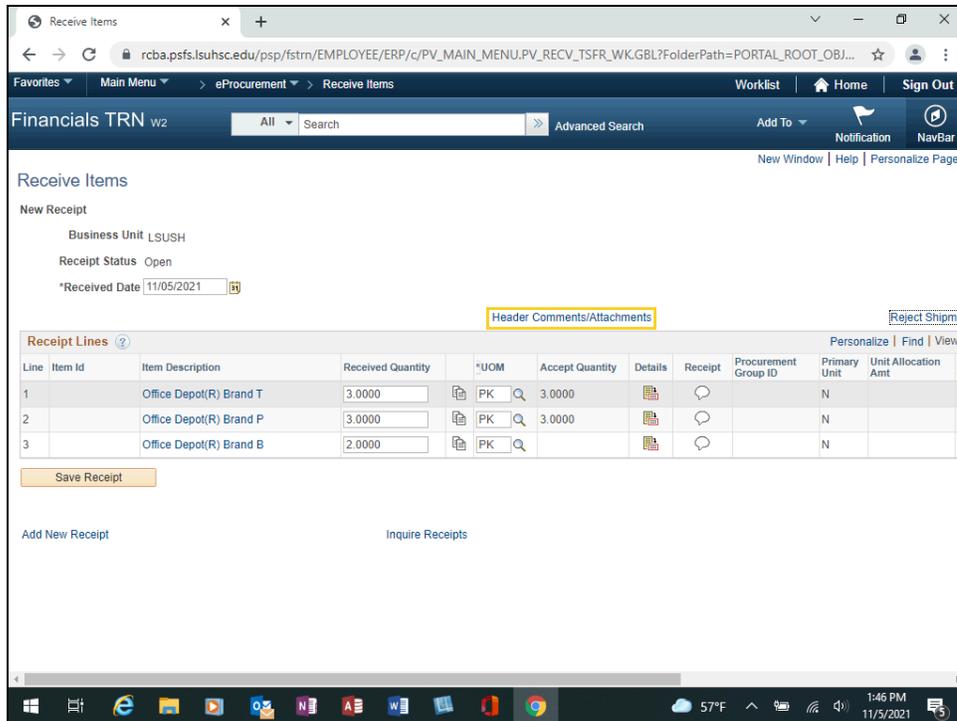
Step	Action
12.	Click the button to the right of the <b>Reject Action</b> field. 

# Training Guide of ePro Items by Department



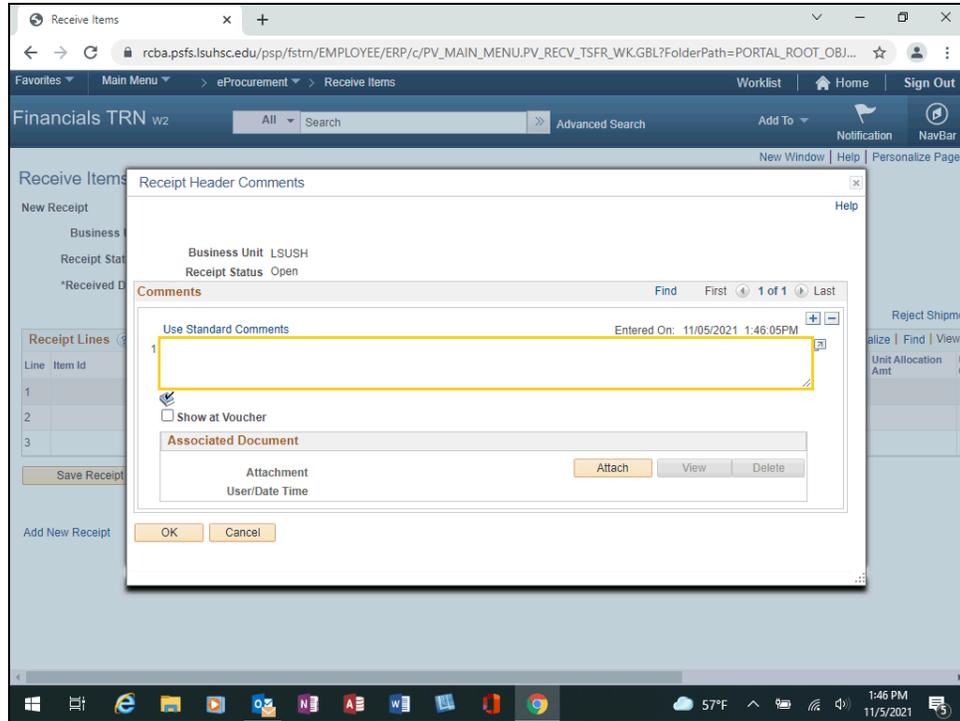
Step	Action
13.	Click the pane. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Return For Replacement</div>
14.	Click the <b>OK</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block;">OK</div>

# Training Guide of ePro Items by Department



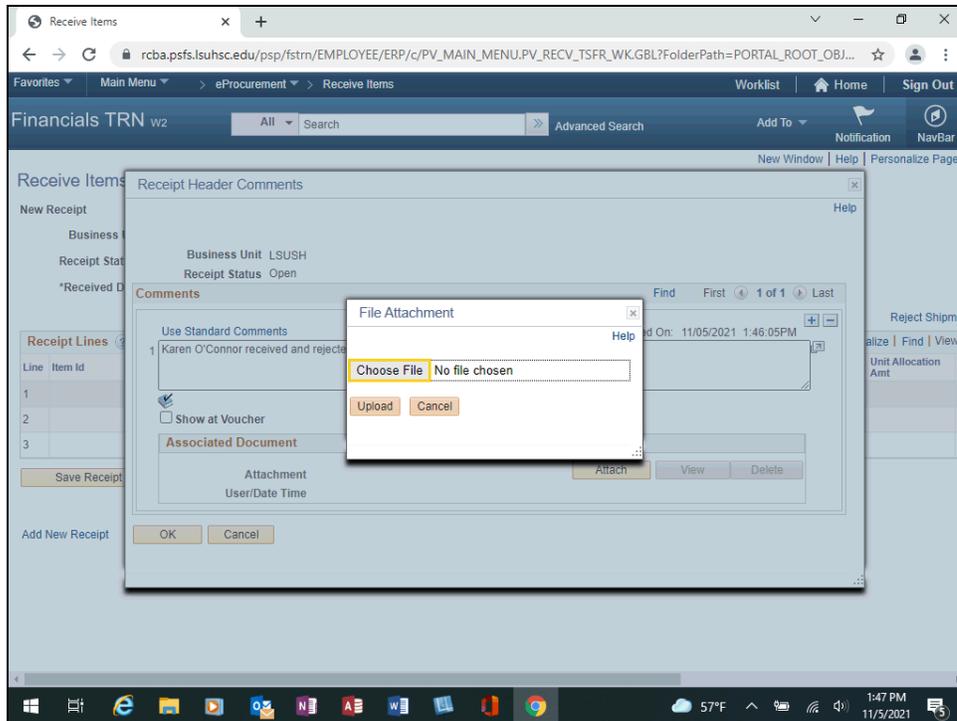
Step	Action
15.	Click the <b>Header Comments/Attachments</b> link. <div style="border: 2px solid yellow; padding: 2px; display: inline-block; margin-top: 5px;">Header Comments/Attachments</div>

# Training Guide of ePro Items by Department



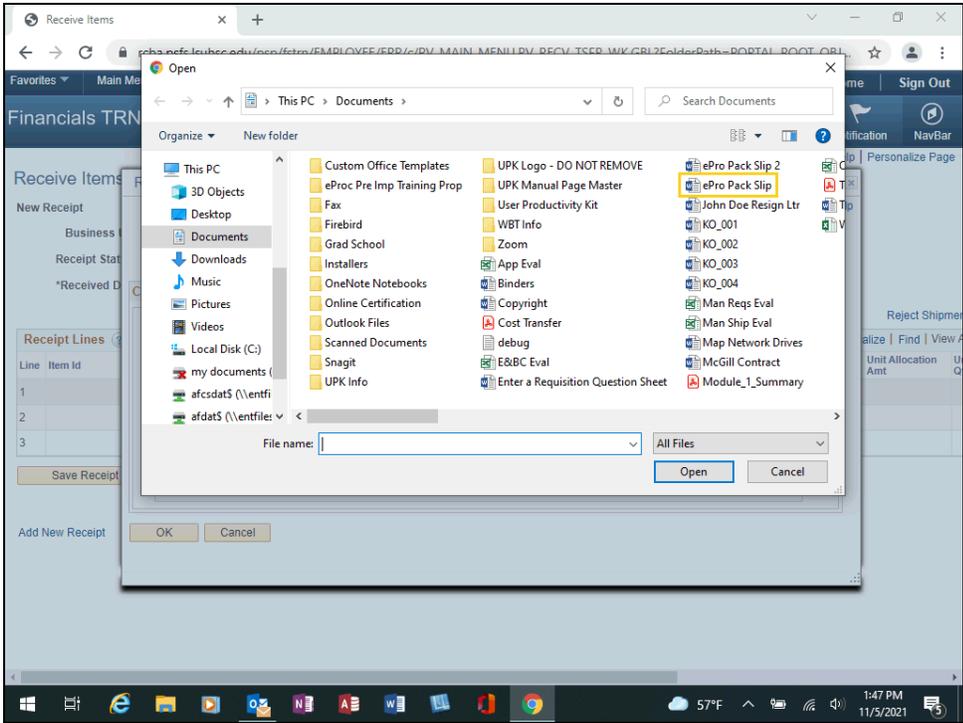
Step	Action
16.	<p>In the <b>Use Standard Comments</b> box, enter comments such as name of the person who signed for the goods and the date the goods were received.</p> <p>Enter the desired information into the <b>Use Standard Comments</b> field. Enter "<b>Packing Slip attached for Office Depot for goods received and rejected by Karen O'Connor on 11/4/21.</b>".</p>
17.	<p><i><b>NOTE: The Packing Slip <u>must</u> be signed, dated, and attached to the receipt. All Office Depot orders come with a Packing Slip. If one is not received, contact our Office Depot representative, Lisa Patton, at Lisa.Patton@officedepot.com. Lisa will send a copy of the packing slip to you.</b></i></p> <p>Click the <b>Attach</b> button.</p> 

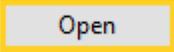
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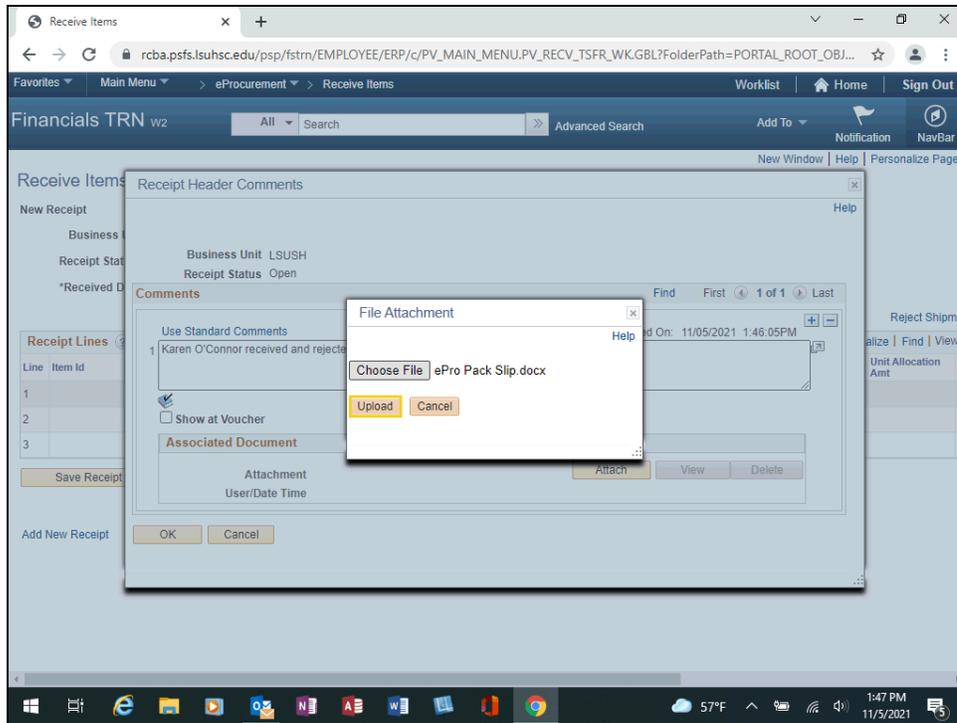
Step	Action
18.	Click the <b>Choose File</b> button. <b>Choose File</b>

# Training Guide of ePro Items by Department



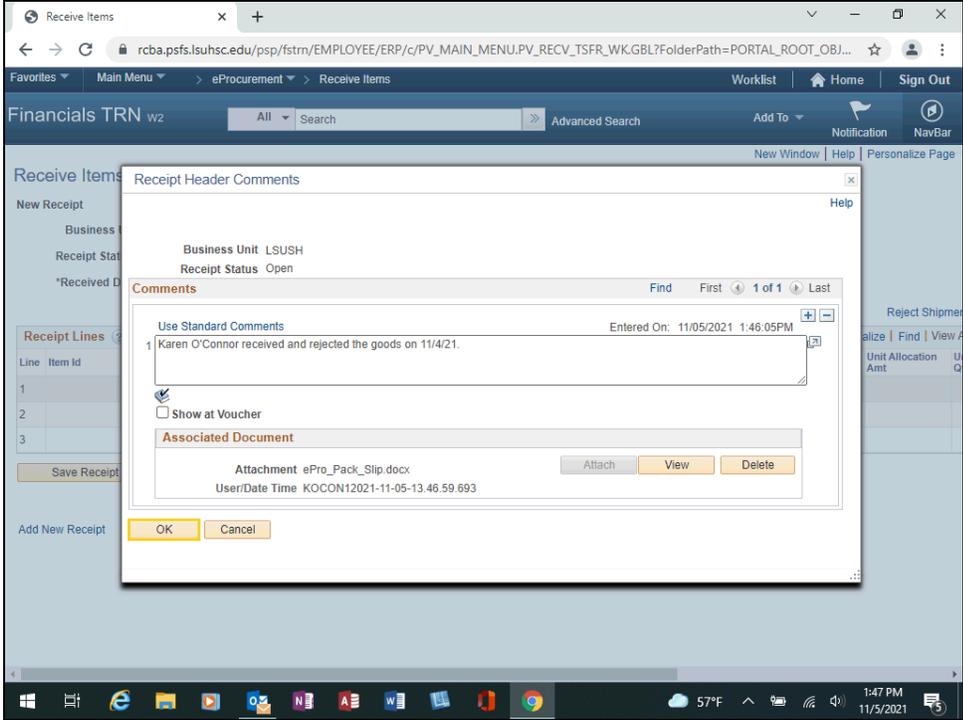
Step	Action
19.	Click the <b>ePro Pack Slip</b> list item. 
20.	Click the <b>Open</b> button. 

# Training Guide of ePro Items by Department



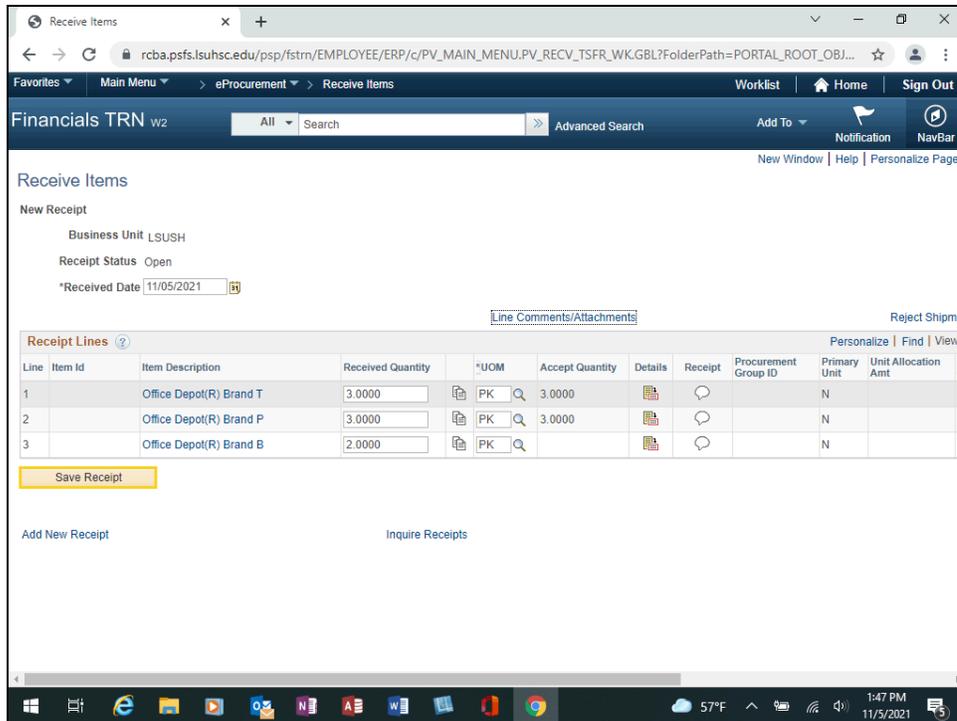
Step	Action
21.	Click the <b>Upload</b> button. 

# Training Guide of ePro Items by Department



Step	Action
22.	Click the <b>OK</b> button. 

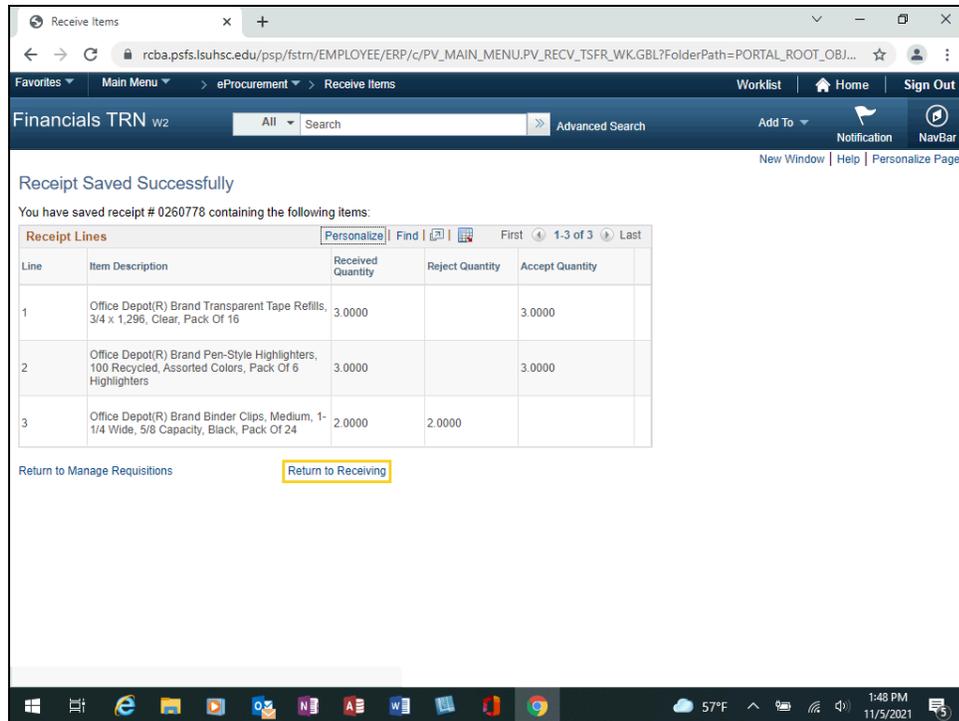
# Training Guide of ePro Items by Department



Step	Action
23.	Click the <b>Save Receipt</b> button.

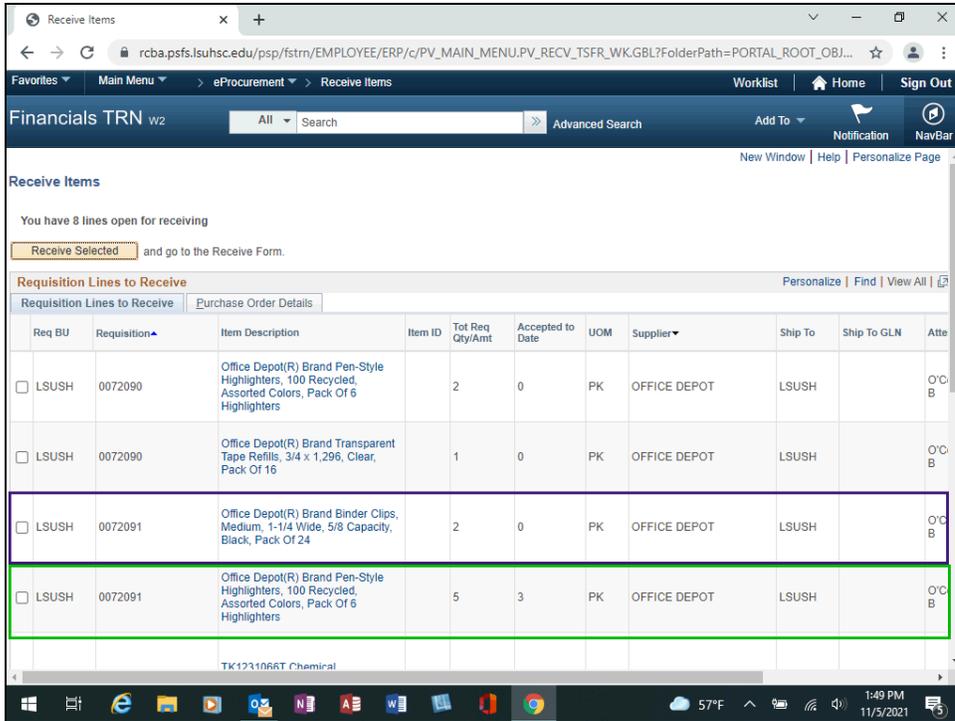


# Training Guide of ePro Items by Department



Step	Action
24.	<p>The <i>Receipt</i> confirmation displays the <i>receipt number</i>, <i>the quantity and goods received</i>, and <i>the quantity and goods rejected</i>.</p> <p><b>NOTE:</b> <i>The receiver should then reach out to the buyer to relay this information.</i></p> <p>Click the <b>Return to Receiving</b> link.</p> <p><a href="#">Return to Receiving</a></p>

# Training Guide of ePro Items by Department



Step	Action
25.	<p>Two of the <b>0072091</b> requisition items remain in the Requisition Lines to Receive panel as Pending. <b>Line 1</b> is the binder clips which were rejected, but rejected for replacement. The binder clip packs remain so they can be received when the correct binder clip is sent by Office Depot.</p> <p><b>Line 2</b> is the highlighters. Only a partial shipment was received, so two (2) packs are still outstanding. This line remains so that those two (2) packs can be received when sent by Office Depot.</p>
26.	<p>This completes <i>Reject ePro Goods in the Department</i>. <b>End of Procedure.</b></p>