Receiving Assets

This instructional guide describes how to receive assets in PeopleSoft. To learn general information about receiving, attend “Introduction to Purchasing and Payables.” If receiving a good, see the instruction guide titled “Receiving Goods.”

- Log on to myUFL (my.ufl.edu) using your GatorLink username and password
- Navigate to eProcurement > eProcurement Home > Receive (listed as Receive Items in the left-hand navigation menu)
- At the Receipts for—Your Name Here screen, click the “Add New Receipt” link
- At the “Add a New Value” tab on the Receiving screen
  - Confirm the Business Unit listed is the PO Business Unit for which you are receiving this good
  - Click “Add”
- At the Pick Purchase Order screen
  - Change the number in the “Days +/- Today” box if the Purchase Order was initiated more than 30 days before today’s date (the date on which you are receiving)
  - Also, clear the “Ship To” field
  - Click “Search”
- From the Search Results displayed, check the box (under “Sel” heading) by the Purchase Order for which the goods have been received
  - Click “OK”
- In the Receipt Lines, enter quantity received under “Receipt Qty” heading
- Next, select the Serial Button associated with the Purchase Order (click the box so that a check mark appears). Then click the hyperlink found in the same row in the “AM Stat” column

Asset Management Information Screen
- At the Asset Management Information Screen, click "More Details" and enter the following information:
  - Custodian - The custodian is the Accountable Officer who has been pre-approved by Asset Management Services to serve as the person responsible for the department's equipment. Usually this is a dean director or chairperson. (Please contact Sherry Adams or Matt Alday at 392-2556 if you are unsure who your accountable officer is.) When entering the custodian name, please use the format "Last name,First name" with no spaces
  - Location - Indicate where the asset will be kept. The decal will be brought to this location for placement
  - Model - This field is used to indicate the individual using the item. Please enter the name of the individual who will be using the equipment
  - Manufacturer - Please enter the manufacturer (i.e. Gateway)
- Click the “View” link to review all distribution lines for the receipt (located to the right in the blue bar titled “Distribution Information”)
- Use the notify button to send an e-mail to your departmental property contact to notify them the item has been received

One Funding Source
- If the asset is being paid for from one funding source, the asset should only have one distribution line
- In the Serial ID Field:
  - Enter the Serial ID (as provided by the manufacture)
- In the Asset ID Field, leave the default value for Asset ID (NEXT) as is
- Click “Save”
- On the Receiving screen, a Receipt Number will be listed and Receipt Status will change from “Open” to “Received”
Split-Funded Asset

- If the asset is a split-funded asset, it will need to have multiple distribution lines (one per funding source)
- To add a distribution line, click the “Plus” sign
  - In the Serial ID Field:
    - Enter the Serial ID (as provided by the manufacture) for each distribution associated with the same asset
    - Example: If a computer is purchased and received but is paid for from 2 funds, there will be two distribution lines (.5 quantity each line). The same Serial ID should be entered on both distribution lines
  - The same Serial ID can only be entered into distribution lines that equal a quantity of one
  - In the Asset ID Field:
    - Enter a number (i.e., “1” – without the quotes) at the end of the default value for Asset ID, which is “NEXT”
    - Example: A computer is bought and received but has multiple distribution lines. A quantity of .5 exists for both distribution lines, but overall the total asset is 1. The Asset ID for both distribution lines will be “NEXT1.” This will assure that these lines combine to produce one Asset ID instead of two
- Click “Save”
- On the Receiving screen, a Receipt Number will be listed and Receipt Status will change from “Open” to “Received”

Receiving Multiple Split-Funded Assets

Follow the same navigation and process described, except:

- A different serial ID should be entered on each line since you are receiving multiple assets
- If any of the distribution lines are to be combined into one Asset, then the same number (i.e., ‘1’) should be entered at the end of the word ‘NEXT’ for each line that needs to make up 1 asset
- Finalize by clicking on “Save.” Look for the Receipt Number and Receipt Status as described above