

# Receiving Request eForm

# Tables of Contents

- What is the Receiving Request eForm? .....3
- Why am I being asked to approve? .....5
- How do I change the Delivery Contact? .....8
- What do I do if the invoice is ok to pay? .....17
- What do I do if the goods/services haven't  
been received yet? .....21
- What do I do if the invoice should not be paid? .....27

# **What is the Receiving Request eForm?**

# What is the Receiving Request eForm?

- An eForm that is generated when an invoice is processed by Accounts Payable that requires a “Receiver” before payment.
  - This is generated when the Purchase Order type is RO (Receiving Order) or QO (Quote Order)
- **Purpose**: To confirm that the goods/services referenced in the PO were:
  1. Received,
  2. Meet the department’s expectation, and
  3. Payment can be made

**Why am I being asked  
to approve?**

# Why am I being asked to approve?

- You are listed as the Delivery Contact for the PO.
  - All approvers will receive an email notification advising them when a Receiving Request is pending their approval.
- You are being asked if the goods/services listed on the PO have been:
  1. Received
  2. Meet your department's expectations, and
  3. The invoice can be paid

# What happens when I approve?

- Once approved, the invoice will be released for payment by the payment due date.
- The invoice will **not** be paid until this eForm is approved by the PO's Delivery Contact.

# How do I change the Delivery Contact?

I have been **incorrectly listed** as the Delivery Contact.



# Changing the Delivery Contact

- If you were incorrectly listed as the Delivery Contact, you will need to edit the request and enter the correct contact person's name.
- See slides 10 – 16 for instructions.

# Changing the Delivery Contact

- Sign into [UMeNET](#) with your CaneID and CaneID password (same used to log into myUM).



- Click the [Approve Requests](#) link.



# Changing the Delivery Contact

- Open the Receiving Request eForm by selecting the ID or Title.

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Elsa Liauwapau Preferences Toggle Tips

## Approve Requests

You are included in the approval flow for these requests, and you are required to approve or deny them. To review a summary of a request before...

You have 894 requests awaiting your approval.

<input type="checkbox"/>	Type	ID	Submitted Date	Requester	Status	Title
<input type="checkbox"/>		RR11093	Tue, 5 Oct, 2010	Ariba System	Submitted	Receiving Request for P158477/40029194 /COLEMAN TECHNOLOGIES INC
<input type="checkbox"/>		RR11092	Tue, 5 Oct, 2010	Ariba System	Submitted	Receiving Request for M158937/201018 /

- Select the Edit button.



# Changing the Delivery Contact

- Click the dropdown arrow for Delivery Contact and select Other.

Summary Approval Flow

Save As: Receiving Request for P158477/40029194 /COLEMAN TECHNOLOGIES INC

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**Complete Form - Receiving Request**

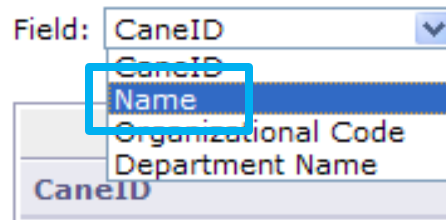
By approving this Receiving Request, you acknowledge when the invoice is due.

*PO #:	<input type="text" value="P158477"/>
*Invoice #:	<input type="text" value="40029194"/>
*Delivery Contact:	<input style="border: 2px solid blue;" type="text" value="Elsa Liauwapau"/>
Vendor:	<input style="border: 2px solid blue;" type="text" value="Ariba System"/>
Buyer:	<input type="text" value="Allison Gilbert"/>
PO Type:	<input type="text" value="Haidong Jiang"/>
PO Amount:	<input type="text" value="Andrew Vinard"/>
PO Date:	<input type="text" value="Marilyn Greene"/>
	<input type="text" value="Elsa Liauwapau"/>
	<input style="border: 2px solid blue;" type="text" value="Other..."/>

AMANDA GRABIOSKI  
COLEMAN TECHNOLOGIES INC

# Changing the Delivery Contact

- Change Field from CaneID to Name.



- Type in the name for the correct Delivery Contact, then click the Search button.

Field:

# Changing the Delivery Contact

- Click the Select button.

Field:

CaneID	Name	Organizational Code	Department Name	
cgcent\va.gilbert2	Allison Gilbert	4300132	ACCOUNTS PAYABLE/DISBURSEMENTS	<input type="button" value="Select"/>

- Notice the Delivery Contact name has changed.

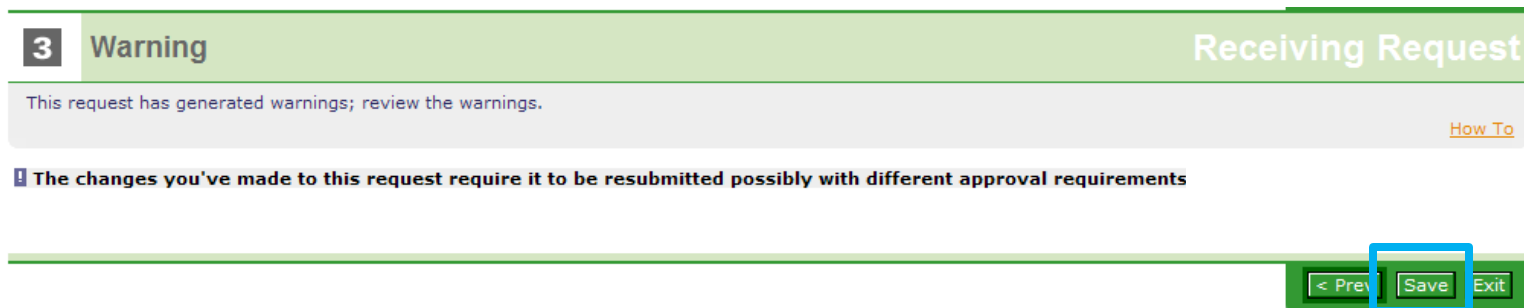
\*PO #:   
\*Invoice #:   
\*Delivery Contact:    
Vendor: [V0000381080: COLEMAN TECHNOLOGIES INC](#)

# Changing the Delivery Contact

- Then click the Submit button.

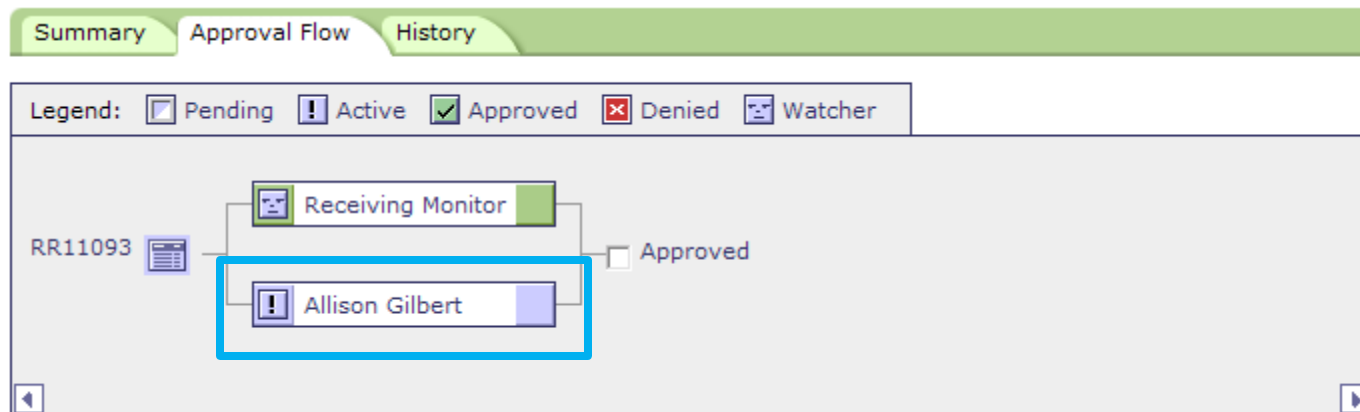


- Don't worry if you receive the following message. Select the Save button.



# Changing the Delivery Contact

- This action has changed the approval flow so that the newly entered person now needs to approve this request.



- They will receive an Ariba email notification advising that their approval is required.



# What do I do?

The Goods/Services have been received and the invoice is **OK to pay.**

# Ok to Pay

- The Delivery Contact will need to approve the eForm.
- Once approved, the invoice will be released for payment by the payment due date.
- See slides 19 – 20 for instructions.

# OK to Pay

- Sign into [UMeNET](#) with your CaneID and CaneID password (same used to log into myUM).



- Click the [Approve Requests](#) link.



# OK to Pay

- Open the Receiving Request eForm by selecting the ID or Title.

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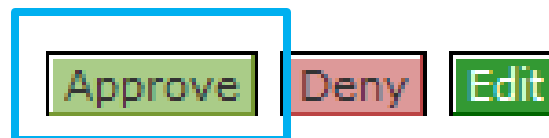
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- Select the Approve button.



# What do I do?

The Goods/Services have **not yet been received.**

# Not Yet Received

- **Do not deny the document!** If this request is denied, the request for payment will be deleted from the system.
- Enter a Comment in the eForm with the anticipated delivery date.
- Once delivered, approve the Receiving Request eForm.
- See slide 23 – 26 for instructions.

# Not Yet Received

- Sign into [UMeNET](#) with your CaneID and CaneID password (same used to log into myUM).



- Click the [Approve Requests](#) link.



# Not Yet Received

- Open the Receiving Request eForm by selecting the ID or Title.

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- Select the Add Comment button.

Comments - Entire Receiving Request

Add Comment



# Not Yet Received

- Enter your anticipated delivery date, then select the OK button.

**Add Comment**

Enter comments for the entire request; other users will see your comments.

Comments

- Verify the comment was added to the eForm.

## Comments - Entire Receiving Request

- COMMENT by **Elsa Liauwapau** on *Wednesday, October 13, 2010 at 12:40 PM*  
the goods should be delivered by October 29, 2010

# Not Yet Received

- Then close the eForm by selecting either the Home or Logout buttons.



- Once the goods/services have been delivered, follow the instructions on slides 17 – 20 to approve the eForm.

# What do I do?

The goods/services were received and the invoice **should not be paid for.**

# Do Not Pay

- The Delivery Contact should deny the Receiving Request and include the reason why the invoice is not to be paid.
- The Receiving Request eForm should only be denied if, for whatever reason, the University should not be billed for the invoice.
- See slides 29 – 32 for instructions.

# Do Not Pay

- Sign into [UMeNET](#) with your CaneID and CaneID password (same used to log into myUM).



- Click the [Approve Requests](#) link.



# Do Not Pay

- Open the Receiving Request eForm by selecting the ID or Title.

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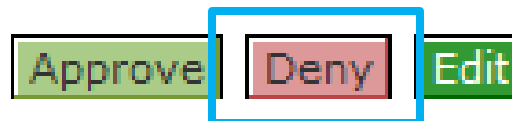
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- Select the Deny button.



# Do Not Pay

- Enter the reason the invoice should not be paid in the Comments section, then select the OK button.

## Deny - Comments

Please enter a comment to explain why you are denying the request. You can also choose to archive

You chose to deny RR11093.

Comments: The furniture is complete unacceptable. It's wobbly and is of poor quality

Archive item(s) to folder: Archive Items

# Do Not Pay

- Once denied, the invoice will be deleted from the Accounts Payable system and no payment will be sent to the vendor.