Electronic receiving is used for 100% of all eVA purchase orders with the exception of capital construction. It documents goods/services that have been received and the actual date of receipt.

eReceiving increases efficiency for Procurement Services, Accounts Payable, University departments and vendors. It also improves accountability, promotes prompt payment, and provides a complete audit trail as well as increases customer service.

This manual will serve as a step-by-step instructional guide on how to maneuver through Banner XE.
# eReceiving User Guide

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Step 1: Access eReceiving in Banner

1. Select the Menu Icon \(\equiv\) and select Form FPARCVD; or
2. Type FPARCVD in the Search field. Press Enter or select the form in the drop-down menu. The FPARCVD form will appear.
1. Type **NEXT** in the **Receiver Document Code** field to automatically assign a document number.

2. Click 🔄 (next block) or press **Ctrl & Page Down** to advance to the **Receiving Header** section.
3. Receiving Method is a required field. Select the drop down box and choose the appropriate Receiving Method.

4. Carrier field is not a required field.

5. Date Received should be changed to reflect the actual date the goods/service was received.

6. Received By field cannot be changed.

7. Click (Next Block) or press Ctrl & Page Down to advance to Packing Slip.

Hint: The Date Received is defaulted to today’s date. This can be modified and shall reflect the actual date the goods/services were received. The Received By field defaults to the person who logged in. This cannot be modified.
8. Enter the packing slip information into the Packing Slip field. This can be numbers and/or letters. If no packing slip is received, enter information that will help your department identify the goods or service.

9. Click (Next Block) or press Ctrl & Page Down to advance to Purchase Order field.
10. Enter **Purchase Order** number. Press **Tab** (Tab). The PO information will populate the **Buyer** and **Vendor** fields.

11. **Receive Items** is the default. If you wish to Adjust Items (or complete a return go to Slide 28, Step 6).
12. To receive purchase order items, select the **Options** drop down menu and **Select Purchase Order Items**. A new page will open.

- Do *not* click on Receive All Purchase Order Items, because it will default to receiving all quantities.

**Hint:** If you select **Receive All Purchase Order Items** you should bypass the next few slides, continue on to slide 14.
13. Select line items to receive by checking associated **Add Item** box.

14. After selecting the items received, a new receiving document number will be created for those items received.

**Hint:** This is where you add the line items you wish to receive and where your Receiver Document number will be assigned.
15. To Receive all items select **Receive All**, if applicable.

16. Select **Save**.
Step 2.4: How to create an eReceiver - Select Purchase Order Items

17. The box will indicate that your line items have been saved. Select OK.
Step 2.4: How to create an eReceiver - Select Purchase Order Items

18. Click on the black X. Then select Yes, to close this form.
20. Click (Next Block) or press Ctrl & Page Down to advance to the next page.

Hint: Once you add the items you received and exit that screen or receive all, Banner will take you back to what looks like the beginning. You must follow the next step to enter your quantities and complete your receiver.
Step 2.5: How to create an eReceiver - Enter Quantities Received

21. When receiving by selected line items, enter quantity received in the **Current** field.

22. If "Receive All" was selected, the **Current** amount defaults to the **Ordered** amount.

23. Click (Next Block) or press **Ctrl & Page Down**.

Hint: If you received all by error, you can change the amount in the **Current** field to the amount you actually received. The amount in the **To Date** column is the quantity previously received. The amount in the **Current** column are quantities you would like to receive.
24. By using the **scroll bar** you can scroll through the line items received. There will be a new screen for each line item.

**Hint:** Each line item on your purchase order is shown individually. Line item numbers will change as you scroll up or down.
Step 2.6: How to Complete an eReceiver - Complete the Receiver

25. Click (Next Block) or press Ctrl & Page Down.
26. Click (Complete).

Hint: If this was a partial eReceiver a new Receiver Document will need to be created for any remaining items that need to be received.
27. The message on Auto Help Line should indicate that the document has been completed. If you do not see this message, then the receiving document has not been completed. Incomplete receiving documents will not be processed and matched for payment.
28. Click on the black X to close the form.
29. Then, click on “Old Dominion University” to return to the Banner XE Home Page.
Step 3: Research the Purchase Order in FOIDOCH

1. Go to FOIDOCH under the menu icon or type FOIDOCH in the Search bar.
2. Enter PO in the Document Type field. Press Tab.
3. Enter the E number in the Document Code field.
4. Click Go.

Hint: Always drop the ‘P’ in the EP number when searching in Banner.
5. Click on the Purchase Order number and click on RELATED and select QUERY DOCUMENT [BY TYPE].
5. If the purchase order is a change order, then enter the sequence number in the Change Sequence Number field (i.e., enter 1 for E2436668-V2). Otherwise, click Go and use the Page Down arrow at the bottom left corner of the screen to go through the purchase order.

Hint: To exit out of Banner XE forms like this one, click on the white X at the top left of the screen.
1. **FOIDOCH** also provides the receiving report information. ALL generated receivers for the purchase order are listed, along with its status. The status indicator shows whether a receiving document has been Completed or Incomplete.
   - ‘C’ Status means Complete.
   - Blank Status means the receiver is Incomplete.

![Document History FOIDOCH 9.0 (PPRD2_DB)](image-url)
2. Click on the Receiving Document you wish to review.
3. Click on RELATED and select QUERY DOCUMENT [BY TYPE].
4. You are now in the **Receiving Goods Query**. This option allows query access to receiver details. Click **Go** to query the receiver.
5. Use the down arrow to navigate to each section of the receiver.

6. Once you get to the **Commodity Information** section, use the scroll bar to go through all the line items(s).

7. You will know that the **Receiver Document** has been received and checked Complete when you see a **Y** the Complete box.
8. For Incomplete Receivers, the Complete field will be blank even though the Receiving Document was done for these items. To complete; go to FPARCVD and type in the Receiver Document Code. Choose **Next Block** or **CTRL & Page Down** until you get to the complete screen. Click on **Complete**. (see Step 7: How to Complete an Incomplete Receiver).
1. To view a key for the full list of status indicators, click on Tools and under Options select View Status Indicators. (See next slide for full list of status indicators)
3. After selecting View Status Indicators the below screen will pop up.
   - Invoice with **R** status means the invoice is waiting for a receiver.
   - Receiver with **C** status means Complete.
   - If the status is **Blank** that would mean the receiver is Incomplete.
2. Click Next Block or Ctrl & Page Down, fill in the Receiving Header, Packing Slip and the Purchase Order sections.
3. Select Adjust Items in the Purchase Order section.
4. Click on the Options drop down menu and click Select Purchase Order Items to advance to the next screen.
5. Select the items you are returning by checking the associated Add Item box.

6. Click Save and then click X. When the “Close This Form?” box pops up, Click Yes.

Hint: After selecting PO items and exiting this screen Banner will take you back to the beginning you must click next block or ctrl page down to continue and complete your receiver.
7. Click Next Page or Ctrl & Page Down.
8. Enter the quantity that is being returned under Adjustment in the first box. If you are returning 1, enter -1.
9. Click Next Page or Ctrl & Page Down.
Step 6: How to Complete a Return or Adjustment Receiver

10. Click on **Complete**.

11. The message on the **Auto Help Line** should indicate that the document has been completed.

12. Click the **X**. Click **Old Dominion University** to return to the main menu.
Step 7: How to Complete an Incomplete Receiver

1. Go to FPARCVD.
2. Instead of typing in NEXT in the Receiver Document Code field you will type the incomplete Receiver Number (beginning with a Y) and click Next Block or Ctrl & Page Down.

Hint: To find the incomplete receiver number, go to FOIDOCH. See Slide 19 or Step 3 and it will instruct you on how to see the purchase order and its associated receivers.
3. Click **Next Block** or **Ctrl & Page Down** to navigate through the Receiver sections. Make sure that all required sections are correctly filled in.

4. If Banner stops at the Purchase Order section (see below) and gives you the hint on the **Auto Help Line** to select Purchase Order Items you will need to proceed to **Options** and select **Select Purchase Order Items** from the drop down menu and continue with **Step 2.4 on Slide 9** until your receiver is complete.
5. If you did not receive the “Select Purchase Order Items...” message on the Auto Help Line and you are able to move forward, click Next Block or Ctrl Page Down.

6. Enter the quantities received, click Next Block or Ctrl Page Down and click Complete. Refer to Step 2.5 on Slide 15 and continue with the steps until your receiver is complete.
eReceiving Questions/Concerns?

- Procurement Services Department Email procurement@odu.edu
- Barbie Edwards 757-683-3252
- La Toya Ellis 757-683-3105