RECEIVING A PURCHASE DOCUMENT
(PD-Receiving on the employee’s Archibus home screen)

The employee will get an e-mail from Archibus stating he/she has a Purchase Document (PD) awaiting receiving. By this point, the PD should now have an invoice attached to it.

1. Click “PD-Shop Receiving” under Purchase Documents on the employee home screen.

2. On the left side of the screen, select the PD number requiring receiving.
3. Open the invoice attached to the PD. For demonstration purposes, we will show the invoice open on the screen with the PD. You will also need to print the invoice (it should be signed and returned to Admin Services after you complete the receiver, but this may change as deemed by Admin Services to paperless or by using the Receiving Report instead in the future). The important point is to be able to visually compare the price and quantity on the invoice with what is on the PD.
4. Compare the invoice price to the original PD price. Do this for each line item on the PD.

5. Click on the blue numbers for price under “Actual Total Cost”. The window shown below will appear. Use this window to input actual invoice quantity, price per unit and received by.

6. Enter actual quantity and actual unit cost. You will also need to use the ellipses button to select who received the item. Click “Save”

7. Click “Received All Items”

Note 1: If doing a Partial Receiver, select the line items to receive and click the Receive Partial button.

Note 2: Items no longer needed can be cancelled by selecting the line item to be cancelled and then clicking the Cancel button.
Note 3: Clicking the Force Complete button will allow you to close the PD, even when all items are not received. Clicking Force Complete allows you to complete the PD and still show the broken item technically not received.

Note 4: The “Receiving Report” button allows you to open and print a report of the received items (currently not required, but may change). It has space for quantity and price changes and also has a signature block.

8 & 9. After receiving the items on the PD, you will see the above messages. Simply click “OK”.