9. Receipting and Transferring Orders

Overview
Items that you have ordered through ERM need to be receipted in ERM and then transferred to the owner and final location. This quick guide will show you how to do so.

- **Receipting** (aka receiving) is usually completed in the stockroom by the stockroom personnel. Some specialist items may need to be receipted by a DLP.
- **Transferring** items to their correct location and owner must be completed by the DLP for all barcoded items.
- When an item is receipted in ERM, it will be automatically receipted in PeopleSoft Financials/UniServices Purchasing within 2-3 days.

1. Receipting part 1: Search for a purchase order
2. Receipting part 2: Select items to receive
3. Receipting part 3: Review and receive an item
4. Transfer barcoded items

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<th>Steps</th>
<th>Screenshots</th>
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<tr>
<td><strong>1. Search for a purchase order</strong></td>
<td>![Images showing search process]</td>
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<tr>
<td>A. Click Receiving.</td>
<td>![Image showing search interface]</td>
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<tr>
<td>B. Enter P.O. number or cart name in the Search Term field.</td>
<td>![Image showing search interface]</td>
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<tr>
<td>C. Click Search.</td>
<td>![Image showing search interface]</td>
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**Tip:** Uncheck the “Show only open items” box to view orders that have already been receipted.
2. Select items to receive
   A. Check the items you want to receive.
   B. Click Receive Items (5) to add selected items to Work List.

Note:
- **Receive Items** displays the number of items to be added to your Work List. The **Work List** is a group of request items that are ready to be received, but not necessarily from the same shopping cart.
- Click heading to select all items in the search screen.
- Click to cancel the request item (note that this will not cancel the purchase order for the supplier).

3. Receive the selected items
   *Some items that have had barcodes turned off can be instantly received in full by clicking . If you need to edit the quantity received or add a barcode, please follow the steps below.*
   
   A. **If** the quick receipt icon is available, click this to instantly fully receipt the item without barcodes. Otherwise, click to enter the receipting window.
B. Change the **Quantity to Receive** value if you have received a partial order.

C. Make sure **Create Containers** is checked for all chemicals and restricted biologicals.

**Important:**
- If Create Containers (C) is unchecked for an item, all future orders for that item will automatically have barcodes turned off. Please make sure you only uncheck Create Containers for lab equipment.
- Unchecking Create Containers on chemicals or restricted biologicals may breach the Health and Safety at Work Hazardous Substances Regulations, HSNO Regulations and the University Health, Safety and Wellbeing Policy.

D. If a container is to be created, fill in all relevant fields (mainly used for biologicals).

E. Enter/scan the barcode to be attached to the item.

F. Click **Add** after each bar code.

Click **Receive** to complete the receipt.

**Receiving partial orders:**
- If you receive a partial order, the Quantity Outstanding after Receipt will automatically calculate what is outstanding.
- If the quantity received is less than what is outstanding and you are not expecting any further receipts for the item, change Quantity Outstanding after Receipt to 0.

**Note:**
- Click **Package Information** button to open Package Information Details pane and edit if required (H).
- Click **Back to Work List** to stop receiving of this item (G).
4. Transferring items

This feature allows you to change the location and/or the owner of inventory items. For more information about the Container Search window, please see ERM Quick Guide “10. Container Search and Operations”

A. Click Container Search.
B. Click Paste tab.
C. Type or paste in the barcode(s).
D. Click Search.
E. Select the containers to transfer.
F. Click **Operations** and select **Transfer Owner/Location**.
G. Changing owner:
   a. Enter first name or surname.
   b. Select desired user.
H. Changing location:
   a. Select location from drop-down list **OR**
   b. If required location is not available, use location search button to select the location.
I. Click **Transfer**.

**Note:**
- Owner defaults to the logged-in user.
- The locations drop-down is populated by the selected recipient’s alternate delivery locations. You may change your own alternate delivery locations in User Preferences.
- For more details on how to transfer only the owner or location, please see the ERM Quick Guide “10. Container Search and Operations”