

# [Receiving Assets]

Receiving is required on asset purchases. This instruction guide describes how to properly receive a single asset, multiple assets, and assets purchased using several funding sources.

To learn general information about receiving, attend "PST070 Introduction to Purchasing" and "PST120 Asset Management." Also use the instruction guide titled "Receiving Goods."

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- ▶ Log on to myUFL (<http://my.ufl.edu>) using your GatorLink username and password
  - ▶ Navigate to **EProcurement > Receive Items**
    - ▶ 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
    - ▶ Enter the PO Business Unit for which you are receiving this good
      - ▶ Click the "Add" button
  - ▶ 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)
    - ▶ Clear the "Ship To" field
      - ▶ Click "Search"
  - ▶ From the Search Results Retrieved Rows displayed,
    - ▶ Check the box (under "Sel" heading) by the Purchase Order **line** that match the items that arrived
      - ▶ Click the "OK" button
  - ▶ In the Receipt Lines,
    - ▶ Do a separate receipt for each invoice
    - ▶ Enter quantity received in the box under "Receipt Qty" heading
    - ▶ Check the box under the Serial heading
    - ▶ Click the "Pending" link under the "AM Stat" column (Asset Management Status)
  - ▶ At the Asset Management Information Screen,
    - ▶ Click the "View All" link on the gray bar
    - ▶ This will display a row for each item received

**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 for each item (as provided by the manufacturer)
- ▶ In the **Asset ID field**,
  - ▶ Leave the default value for Asset ID (NEXT) as is

**If the asset is a split-funded asset, it will have multiple distribution lines (one per funding source).**

**For a single asset, purchased with split funds:**

- ▶ Click the "View All" link on the blue bar titled "Distribution Information"
- ▶ This will display a row for each funding source used to pay for the item
- ▶ In the **Serial ID field**,
  - ▶ Enter the Serial ID (as provided by the manufacturer) in each distribution row associated with the same asset



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- ▶ 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

**NOTE:** For several assets purchased with split funds, you will not be able to complete the asset management section of the receipt in myUFL.

- ▶ Click OK on the Asset Management Information Page
- ▶ At the Receiving Page click Save. There will be a warning that a serial number has not been selected. Click OK and the receipt will be completed
- ▶ Contact your property contact so that a property update document can be completed
- ▶ List each item on the document and submit. The items will be entered into the Asset Management module in myUFL separately by the Property Office.

- ▶ In the **Asset ID Field**,  
Leave the default value for Asset ID (NEXT) as is Click the "More Details" tab. Enter the information below.
- ▶ **Custodian field** - 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. (If you need to look up your Accountable Officer, please check the asset management web site [http://fa.ufl.edu/am/accountable\\_officers.asp](http://fa.ufl.edu/am/accountable_officers.asp).)
  - ▶ Enter the custodian name and use the format "Last name,First name" with no spaces
  - ▶ When receiving multiple items, you only need to enter this information on the 1<sup>st</sup> row. The name entered on the 1<sup>st</sup> row will populate each subsequent blank row.
- ▶ **Location field** - Indicates where the asset will be kept. The decal will be brought to this location for placement on the item.
  - ▶ Change location if needed.
- ▶ **Model field** - This field is used to indicate the individual using the item
  - ▶ Enter the name of the individual who will be using the equipment. When receiving multiple items of the same thing, you only need to populate the 1<sup>st</sup> row.
- ▶ **Manufacturer field** - Please enter the manufacturer of the item by **using the new lookup icon to select** the manufacturer. The manufacturer will often be different than the vendor. When receiving multiple items of the same thing, you only need to populate the 1<sup>st</sup> row.
  - ▶ If you are unable to find your manufacturer, please select "PENDING INPUT" and email Sherry Adams at Asset Management at [sadams@ufl.edu](mailto:sadams@ufl.edu), with the following: "New Manufacturer" - Name of Manufacturer and PO#

**If there are multiple funding sources, you will need to enter the same Custodian, location, model and manufacturer for each funding source just as you did for the serial number above.**

- ▶ Click the "OK" button at the bottom of the page to go back to the Receipt lines
- ▶ On the Receiving screen,
  - ▶ Click the "Save" button
    - ▶ A **Receipt No** number will display
    - ▶ **Receipt Status** will change from "Open" to "Received"
    - ▶ Use the **Notify Button** to send an e-mail to your departmental property contact to notify them the item has been received

For further assistance contact the **Property Office at 392-2556**