

# Receiving Technical Document

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## Purpose

The receiving document is used to acknowledge receipt of goods or services in return for a purchase order. It helps in recording the quantity of items received, damaged, returned, unordered on a purchase order. In OLE, receiving can be recorded through the monograph receiving document for the monographs and the serial receiving document for the serials. Serial receiving also allows to raise claims and manage the individual issues of a serial or continuing resource title.

This document discusses about the various technical aspects involved in the Monographic and Serial Receiving documents.

## Dependencies (db tables)

Tables used in Monograph receiving

PUR_RCVNG_COR_T	Correction Receiving
PUR_RCVNG_LN_T	Line Item Receiving Document
PUR_RCVNG_LN_ITM_T	Line Item Receiving Item
OLE_PUR_RCVNG_LN_ITM_NTE_T	Ole Line Item Receiving Receipt Notes
OLE_PUR_RCVNG_COR_LN_ITM_EXC_T	Ole Correction Receiving Item Exception Notes
OLE_PUR_RCVNG_LN_ITM_EXC_MDC_T	Ole Exception Type
OLE_PUR_RCVNG_COR_LN_ITM_NTE_T	Ole Correction Receiving Item Receipt Notes
OLE_PUR_RCVNG_LN_ITM_DOC_T	Ole Line Item Receiving Doc
OLE_NTE_TYP_T	Ole Note Type
PUR_RCVNG_COR_ITM_T	Correction Receiving Item
OLE_PUR_RCVNG_COR_LN_ITM_DOC_T	Ole Line Item Correction Receiving Doc

#### Tables used in Serial receiving

OLE_SER_RCV_REC_TYP_T	OLE Serial Receiving Type
OLE_SER_RCV_HIS_REC	OLE Serial Receiving History
OLE_SER_RCV_REC	OLE Serial Receiving
OLE_COPY_T	Ole Copy

## Logical Data Model (Class Structure)

The Monograph or Line Item Receiving document allows the user to create the receiving documents based on the Purchase orders. Each line item receiving document holds information about the vendor, titles and delivery. The Titles consists of information on quantity for each line item recorded.

All the receiving line items are associated with types of notes recorded namely, Exception notes for capturing information on the damaged, unusual or other notes, Receipt notes for receipt statements and Special processing instructions for special notes from the purchase orders.

Corrections can be made to the receiving documents to reduce or increase the quantity received, returned, and/or damaged if the original entered amounts are determined to be in error.

All the claims are stored under the Claim notices in the PDF format with vendor notes for the items. For previously claimed items the user is allowed to add the information received from the vendor under the Claims response information.

An easier way of receiving is provided by the Receiving and Claiming Queue screen for user to receive the PO without payment creation, partially receive the items, pay and receive the items or claim for the line items. Invoices for the titles can be created or titles can be added to existing invoices for payment process.

Serial Receiving Record is used by the user to manage the individual issues of a serial or continuing resource titles. This receiving document holds the inherited information from the Bibliographic, Instance and PO records. It allows the user to create, update the records along with an option for receiving the issue/supplements. Serial receiving record is linked to the OLE

Instance record which is either derived from the Bibliographic or purchase orders. For each OLE Instance only one Serial record is available.

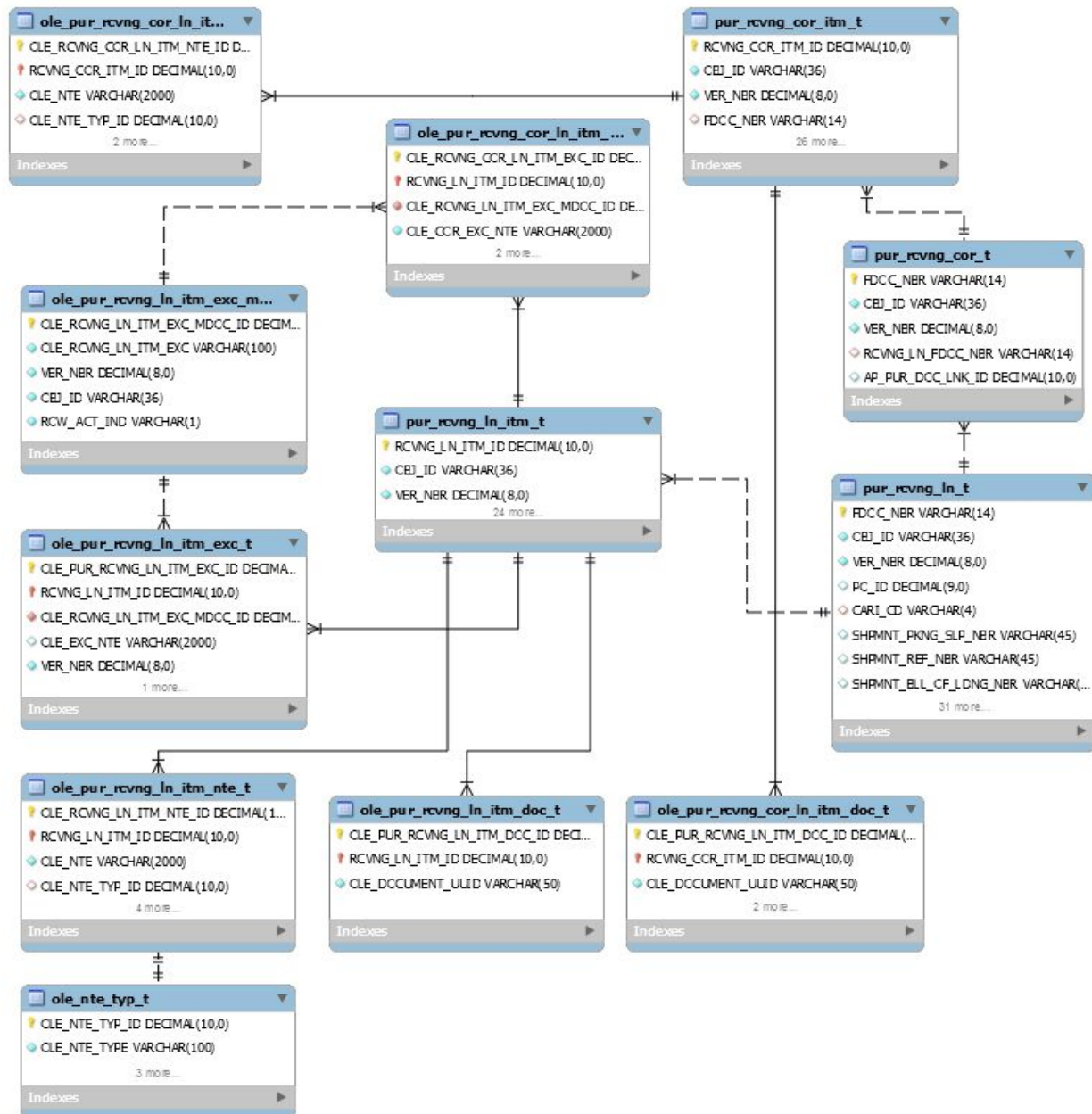
The library has multiple subscriptions for the same title, but the user is allowed to create OLE Instance record and Serial receiving record for each subscription even though it has the same location. If the subscription for a serial is cancelled the Serial receiving record can be deleted by the library.

## **Physical Data Model (Database Schema)**

### **Monograph Receiving**

In the Monograph Receiving the main table that captures the line item information is the Line Item Receiving Document (*pur\_rcvng\_ln\_t*) that captures details on the shipment, vendor and delivery information. Any changes to the items is processed by the Correction Receiving (*pur\_rcvng\_cor\_t*) that captures information on the quantity received, returned, and/or damaged. Specific to the receiving items the Line item notes are captured. The table Ole Line Item Receiving Receipt Notes (*ole\_pur\_rcvng\_ln\_itm\_nte\_t*) is used for capturing the Receipt notes for the items and the Ole Correction Receiving Item Exception Notes (*ole\_pur\_rcvng\_ln\_itm\_exc\_t*) is used for capturing the Exception notes.

The receiving correction for maintaining the information on the quantities received/damaged/returned can be captured under the Correction Receiving Item (*pur\_rcvng\_cor\_itm\_t*). The mapping of the receiving line item and Titles are given under the Ole Line Item Correction Receiving Doc (*ole\_pur\_rcvng\_cor\_ln\_itm\_doc\_t*).



## Serial Receiving

In Serial Receiving the main table for capturing the receive, claim information for the serial or continuing issues is captured by the OLE Serial Receiving (*ole\_ser\_rcv\_rec*) table. The chronology and enumeration captions are captured under the OLE Serial Receiving History (*ole\_ser\_rcv\_his\_rec*) where these captions are unique to the issues. The Action date for receiving the issue and the Action Interval days calculated based on the frequency of the

title/issue required for the claims are captured by the OLE Serial Receiving Type (*ole\_ser\_rcv\_rec\_typ\_t*).



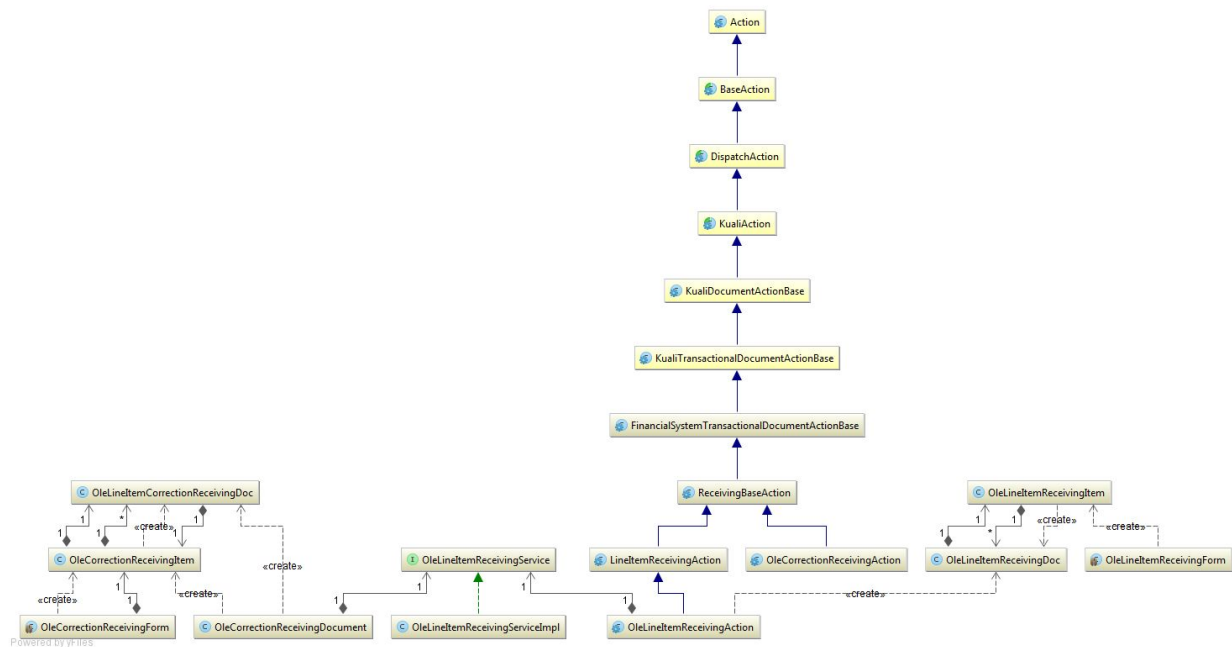
## Service Interface Design (Java)

### Monograph Receiving

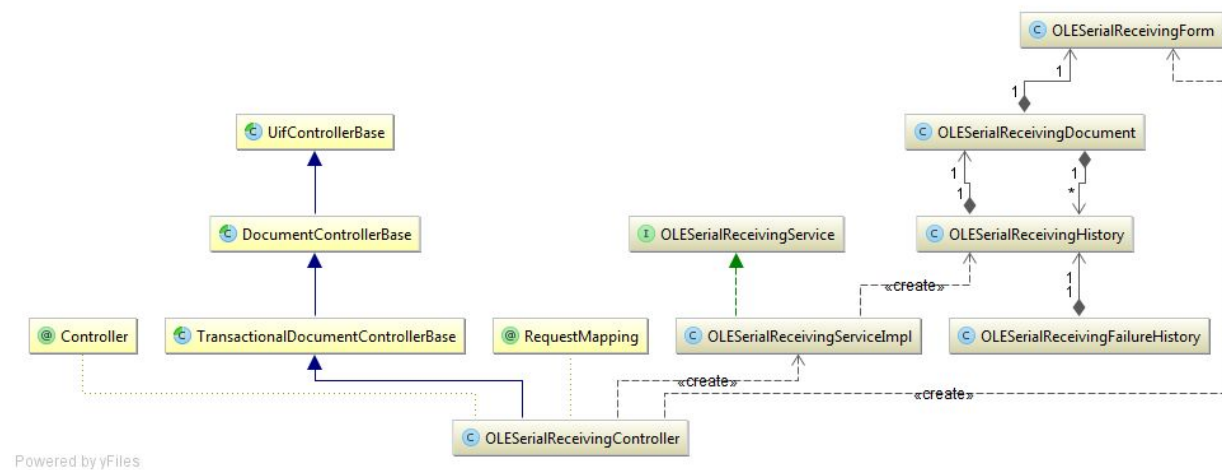
The *LineItemReceivingDocumentRule* class extends the *DocumentRuleBase* which is where the line item receiving rules are maintained.

Methods such as the *validateQuantityReturnedNotMoreThanReceived*, *validateQuantityDamagedNotMoreThanReceived*, *validateAllReceivingLinesHaveSaneQuantities* helps in validating the line items to record the quantities of items received, damaged, returned or unordered on a purchase order.

Maintenance Documents are primarily used for creating and maintaining data elements. The *LineItemReceivingStatusMaintenanceDocument.xml* is used for maintaining the Line Item Receiving status based on the Line Item receiving status code.



## Serial Receiving



The *OLESerialReceivingController* controls the whole serial receiving process. It extends the *TransactionalDocumentControllerBase* class. The *receive* method of the *OLESerialReceivingController* class processes the receive function. Similarly methods such as *route*, *claim*, *save* takes care of the routing, claiming and saving the document.

The class also has special methods such as *saveNote*, *claimNote*, *acknowledgeNote*, *acknowledgeUrgentNote*, *claimAgainNote* to handle special functions relating to note. The data

is collected in the *OLESerialReceivingForm* and the *OLESerialReceivingDocument* is the business object.

For more information, Javadocs can be found [here](#).

## Service Interface Design (SOAP)

Not Available

## User Interface Design

The Receiving document uses KRAD's UIF (User Interface Framework). A very good guide on this can be found [here](#). The Spring Beans XML used in the case of Receiving is under the data dictionary folder.

*LineItemReceivingDocument.xml*, *LineItemReceivingItem.xml*, *LineItemReceivingStatus.xml* and *OleLineItemReceivingReceiptNotes.xml* are used in case of Line item receiving, line items, line item status and receipt notes respectively.

## Data Importing

Not Applicable

## Data Exporting

OLE uses a RDBMS backend and hence any data can be exported using simple SQL queries. Currently there is no direct way in which receiving data can be exported directly from OLE.

## Workflow

Workflow details relevant to the Receiving documents are found in the *PurchasingAccountsPayableTransactionalDocuments.xml* file under the workflows folder.

## System Parameters

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Namespace Code	Parameter Name	Description
OLE-PURAP	INITIAL_COLLAPSE_SECTIONS	Allows these sections to be collapsed when Opening the LineItemReceiving Document
OLE-PURAP	LINE_ITEM_IMPORT	Relate URL for the line item import help.
OLE-PURAP	SHOW_CLEAR_AND_LOAD_QTY_BUTTONS	Allows the display of the clear and load quantity buttons on a receiving line document.
OLE-PURAP	UNORDERED_ITEM_WARNING_IND	Indicates whether a warning message shall be given when a user clicks "add unordered item" button. When set to Y the user will receive a warning.
OLE-SELECT	LINE_ITEM_RCV_DESC	This parameter is for populating line item receiving document description, the value within the braces are pre-defined functions which returns a value based on the input value
OLE-SELECT	SERIAL_RECEIVING_LOADER_DELIMITER	This is used as a delimiter in the csv file.The default value is comma(,)
OLE-SELECT	SERIAL_SEARCH_LIMIT	This is for configuring default serial search limit to display

OLE-SELECT	SERIAL_SINGLE_SEC_LIMIT	This is for configuring default single section limit to display
OLE-SELECT	RCV_REQ_INT	This parameter is for populating Receiving Required Indicator
OLE-SELECT	SERIAL_HISTORY_CSV_NAME	The Name of the csv file ingested for serial history document name should ends with the value specified in this parameter
OLE-SELECT	SERIAL_RECORD_CSV_NAME	The Name of the csv file ingested for serial record document name should ends with the value specified in this parameter
OLE-SELECT	SERIAL_RECORD_DATE_FORMAT	The format of the date for serial record should match with value specified in this parameter
OLE-SELECT	SERIAL_TYPE_CSV_NAME	The Name of the csv file ingested for serial type document name should ends with the value specified in this parameter

## Roles, Permissions and Responsibilities

Permissions and Responsibilities are linked to roles which are in turn linked to Users to give them access to screens and functions.

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Permission ID	Permission Name
OLE10193	Show Serials Receiving Record From Holding
OLE10318	Edit Enumeration Main Receipt History
OLE10319	Edit Enumeration Supplementary Receipt History
OLE10320	Edit Enumeration Index Receipt History
OLE10321	Edit Chronology Main Receipt History
OLE10322	Edit Chronology Supplementary Receipt History
OLE10323	Edit Chronology Index Receipt History
OLE10047	Open Receiving Line Items Document
OLE10279	Edit Serial Receiving Document
OLE10028	Condition on Line Item
OLE10161	Initiate Receipt Status Document
OLE98	Initiate Document RCV
OLE10119	Initiate Receiving Queue Document
OLE10046	Blanket Approve Receiving Line Items Document
OLE10048	Blanket Approve RCVC Document
OLE10055	Add New Line Item
OLE404	Serial Receiving Search
OLE80515	Initiate Document(RCV)
OLE80519	Initiate Document(Complex RCV)

Role Id	Role Name	Permissions
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OLE10019	OLE-Receive-Mgr	OLE10044, OLE10045, OLE10047, OLE10046, OLE97, OLE10050, OLE10051, OLE10052, OLE10055, OLE10011, OLE10014, OLE10048, OLE10057, OLE98, OLE103, OLE10118, OLE10119, OLE325, OLE326, OLE356, OLE293, OLE294, OLE367, OLE368, OLE10124, OLE10125, OLE10126, OLE10129, OLE394
OLE10016	OLE_RCV	OLE10014, OLE10011, OLE10012, OLE10017, OLE10043, OLESEC6001, OLESEC6002, OLESEC6003, OLE10044, OLE10045, OLE10047, OLE10046, OLE97, OLE10050, OLE10051, OLE10052, OLE10055, OLE10057, OLE98, OLE103, OLE10118, OLE10119, OLE325, OLE326, OLE356, OLE293, OLE294, OLE367, OLE368, OLE10124, OLE10125, OLE10126, OLE10129, OLE394
OLE10086	OLE_Serial-Receiving	OLE10193, OLE10279, OLE404, OLE10318, OLE10319, OLE10320, OLE10321, OLE10322, OLE10323
OLE10031	Receiving-AQ1	NA
OLE10032	Receiving-AQ2	OLE98, OLE103
OLE10033	Receiving-AQ3	OLE98, OLE103, OLE97, OLE10057, OLE10129, OLE394, OLE94, OLE268, OLE10067
OLE10034	Receiving-AQ4	OLE98, OLE103, OLE97, OLE10057, OLE80515, OLE80516, OLE80519, OLE80520, OLE10129, OLE394, OLE94, OLE268, OLE10067

Responsibility ID	Responsibility Name
OLE990020	Review OLE_RCVL ApproveReceiveLineItem
OLE990021	Review OLE_RCVC ApproveReceiveLineItemCorrection

OLE990016	Review OLE_REQS GreaterLineItem
OLE990061	Review Serial Receiving Operator