

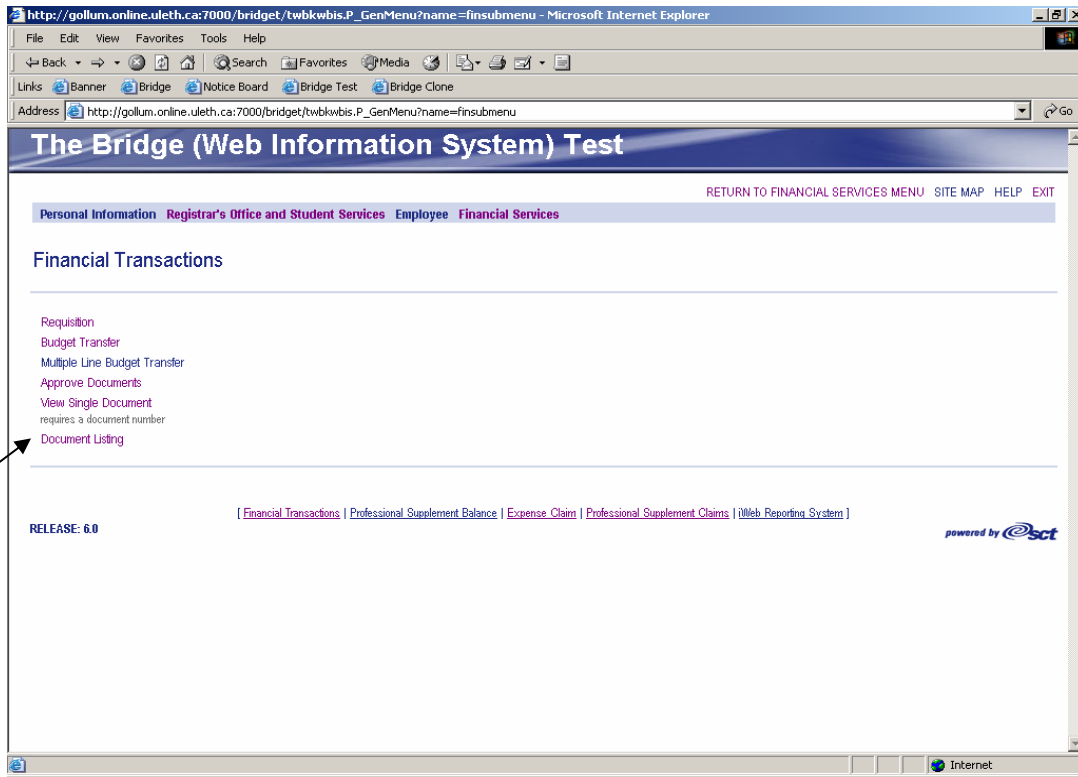
The Bridge

**The University of Lethbridge
Web Information System**

Online Inquiry of Purchase Orders

Procedure Manual
Effective September 1, 2004

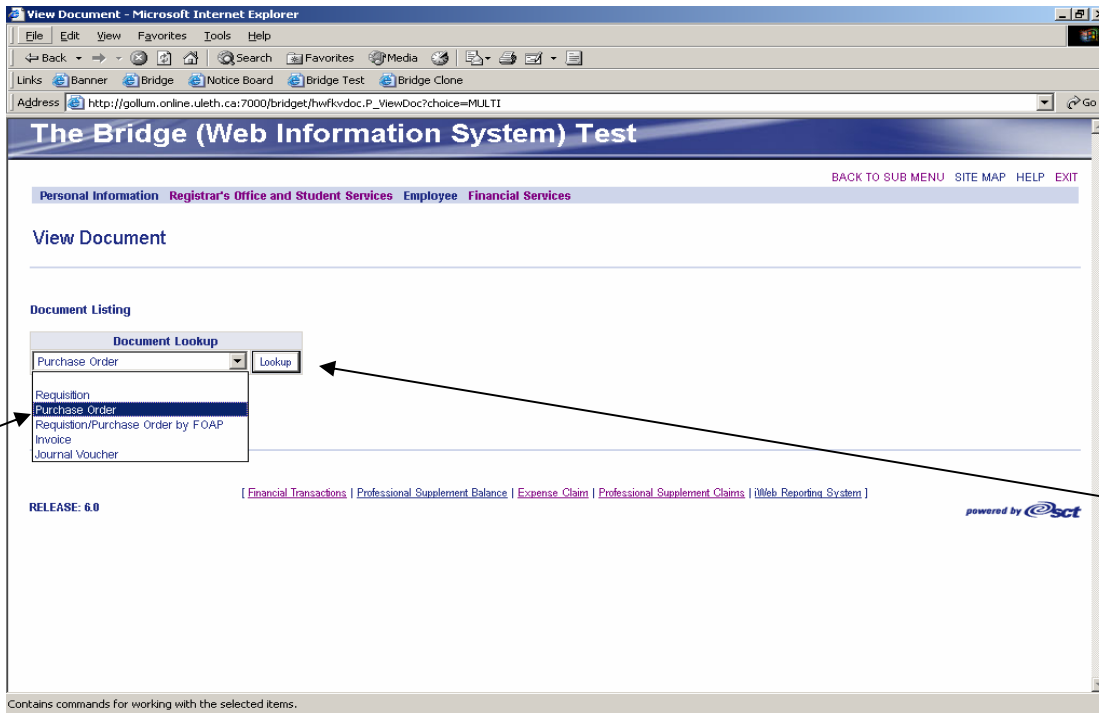
Financial Transactions Menu



Click on Document Listing

Click on the Document Listing menu item

View Document – Document Listing Form



Choose Purchase Order

Click on Lookup

Choose Purchase Order from the dropdown list then click on "Lookup"

Purchase Order Inquiry Form

Document #

Vendor Name

Order Date (From)

Delivery Date (From)

Requestor Name

Buyer Name

Order Date (To)

Delivery Date (To)


You can inquire on any one or combination of the following criteria. (Note: This form is not case sensitive nor are wildcard characters necessary)


Document Number: Type in part or all of the purchase order number

Requestor Name: Type in part or all of the persons name who requested the purchase order

Vendor Name: Type in part or the entire vendor name

Buyer Name: Choose the specific buyer from the dropdown list

Order Date (From – To): Enter/query a date or a date range (if you enter both first and second dates). There is an option between a dropdown menu for each day/month/year or you can click on the calendar  and click on the date (date range will default to the last 90 days)

Delivery Date (From – To): Enter/query a date or a date range (if you enter both first and second dates). There is an option between using the dropdown menus for each day/month/year or click on the calendar  and click on the date.

Purchase Order Inquiry Form with Document Status drop down list

Document Status

Submit Reset Exit Lookup

Document Status: There is a dropdown list for the different categories of status of a document

- No choice:** The default choice is blank which will bring up all documents regardless of status
- Incomplete:** Incomplete documents which must be completed by the originator (person who initiated/posted the requisition)
- Complete:** Documents which have been approved and forwarded on to Materials Management for processing
- PCard:** Documents which have been ordered through Materials Management Procurement Card

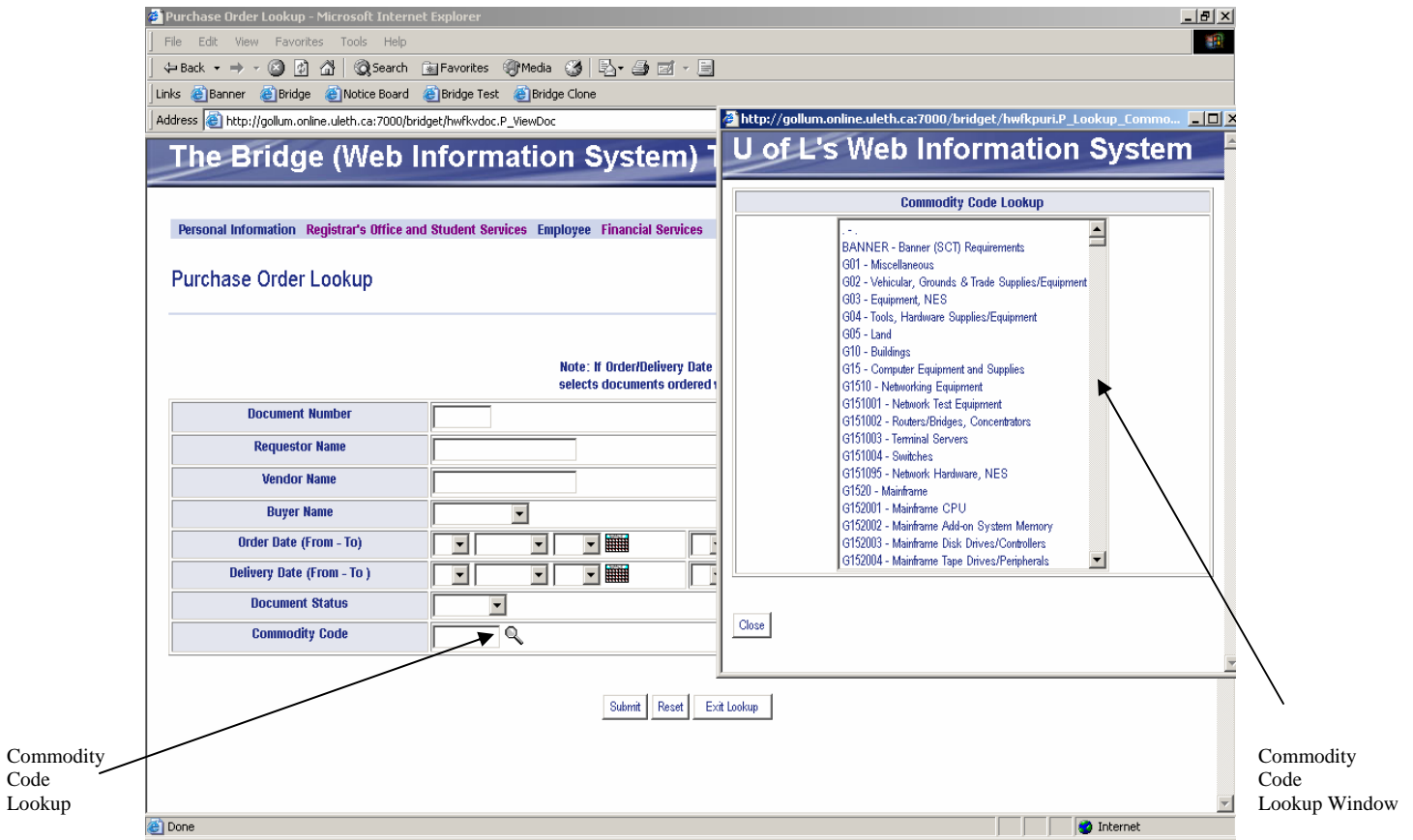
Commodity Code: The default (if left blank) will display all purchase orders regardless of the commodity code. [Go to next page on how to use the commodity code lookup.]

Submit: Generates a report of all purchase orders according to the chosen specifications


Reset: Clears all specifications chosen

Exit Lookup: Will exit the Purchase Order Lookup form and return you to the View Document – Document Listing form.

Purchase Order Inquiry Form with Commodity Code Lookup



Commodity Code

If left blank, the default is to display all purchase orders regardless of the commodity code. This feature is used if you would like to display only those purchase orders with a specific commodity code. In order to utilize this component, you can either type in the commodity code if known; otherwise use the commodity code lookup. Click on the magnifying glass  and the commodity code listing will pop up in another window. Scroll through the listing, then click on the commodity you wish to query on. Click on submit to generate the report of all purchase orders with the selected commodity code.

Purchase Order Inquiry Submitted

Document	PO Date	Delivery Date	Vendor	Requestor	Total	Status	Options
P0503154	23-NOV-2004	24-NOV-2004	Wesclean Southern Sales Ltd.	Greg Lacey	\$ 65.68	Complete	
P0503152	23-NOV-2004	30-NOV-2004	Inter Medico	Olga Kovalchuk	\$ 258.94	Complete	
P0503151	23-NOV-2004	03-DEC-2004	Perkin Elmer Canada Inc.	Olga Kovalchuk	\$ 648.42	Complete	
P0503150	23-NOV-2004	23-NOV-2004	Fisher Scientific Limited	Olga Kovalchuk	\$ 161.00	Complete	
P0503148	23-NOV-2004	23-NOV-2004	Wesclean Southern Sales Ltd.	Hill, S.	\$ 69.55	Complete	
P0503147	23-NOV-2004	26-NOV-2004	Canada-Wide The Ad Agency Ltd.	Brian Sullivan	\$ 3,552.51	Complete	
P0503146	23-NOV-2004	26-NOV-2004	Lethbridge Herald	Brian Sullivan	\$ 595.90	Complete	
P0503144	23-NOV-2004	23-NOV-2004	VWR International, Ltd.	Sutherland, R.	\$ 33.77	Complete	
P0503142	23-NOV-2004	23-NOV-2004	Canadian Tire Associate Store	McDonald, R.	\$ 192.59	Complete	
P0503141	22-NOV-2004	17-DEC-2004	Dell Computer Corporation	Sandzewich, E.	\$ 1,891.26	Complete	
P0503140	22-NOV-2004	16-DEC-2004	Dell Computer Corporation	Berteotti, J.	\$ 682.66	Complete	
P0503139	22-NOV-2004	26-NOV-2004	JourneyEd Canada	Goater, Lori	\$ 50.29	Complete	
P0503138	22-NOV-2004	26-NOV-2004	JourneyEd Canada	Peddle, Derek	\$ 100.58	Complete	

Document Purchase order number. Click on the document number to preview the purchase order. [See page 10]

PO Date Date purchase order was completed

Delivery Date Date of expected delivery

Vendor Vendor service/product is ordered from

Requestor Person who requested the item(s)

Total Total amount of the document (including GST)

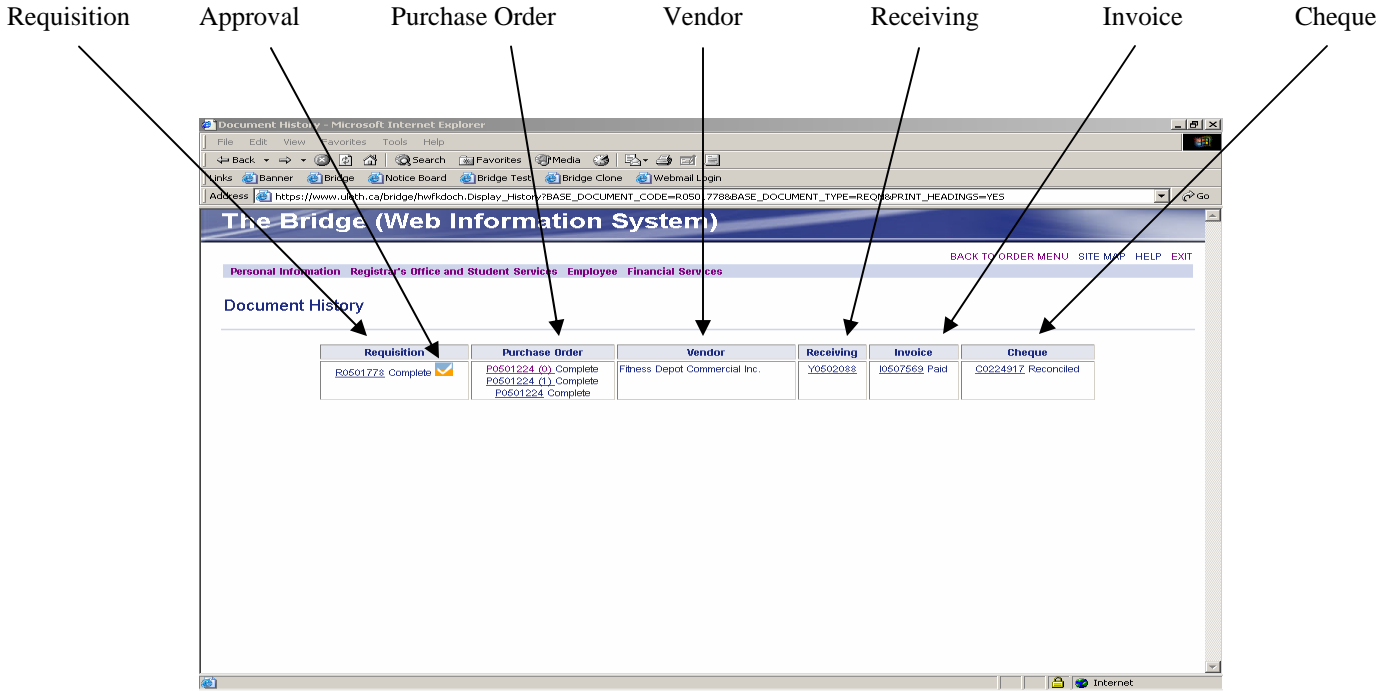
Documents Will display if documents were sent and by what means

Status Displays the current status of document. See page 4 for definitions.
Note: Both completed and pcard purchase orders display as complete

Options Click on this to display the document history with all related documents. Cradle to grave. See page 7.

Sort Order Click on the down arrow to sort descending
 Click on the up arrow to sort ascending

Document History



Click on any document number to preview.

Requisition

Click on the document number to preview the requisition. * [See page 8]

Approval

Click on checkmark to view approval status and history. [See page 9]

Purchase Order

Click on the document number to preview the purchase order. * [See page 10]

Vendor

Will display the vendor name from the purchase order.

Receiving

Click on the document number to preview the receiving document [See page 11]

Invoice

Click on the document number to preview the invoice. * [See page 12]

Cheque

Click on the document number to preview the cheque. * [See page 13]

* Note: Document status will be displayed beside the document number.

Preview Document Requisition

Personal Information **Registrar's Office and Student Services** **Employee** **Financial Services**

View Document

Requisition Header

Requisition #	R0501778	Currency	Canadian Dollars	Requisition Total	15,719.82
Status	COMPLETE			Order Date	24-Jun-2004
Department	Physical Education Facilities				
Requestor	DeJong, N.	Suggested Vendor	Fitness Depot Commercial	Transit Insurance	NO
Ship to	The University of Lethbridge	Delivery Instruction		Delivery Date	24-Jul-2004
				Supporting Documentation	237702

Requisition Commodities

Item	Description	U/M	Quantity	Price	Ext Amount	Tax	Item Cost	Purchase	Order	Buyer
001	Athletic/Recreation Equipment & Supplies	EA		2,1,270.00	2,540.00	177.80	2,717.80	<u>P0501224</u>		Nick Bensch
	Text: Concept II Power									
002	Athletic/Recreation Equipment & Supplies	EA		2,6,075.71	12,151.42	850.60	13,002.02	<u>P0501224</u>		Nick Bensch
	Text: Precor 546i Elliptical Fitness Crosstrainer (EFX) with Cross Ramp									
Commodity Total:								15,719.82		

Requisition Accounting

Item Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Percentage	Amount
001	1	9	05	12151	12151	6560	8079	4501		100.000	2,717.80
002	1	9	05	12151	12151	6560	8079	4501		100.000	13,002.02
Total of displayed sequences:											15,719.82

Click on any underlined document number to preview.

Preview Document

Approval Status

View Document - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Links Banner Bridge Notice Board Bridge Test Bridge Clone Webmail Login Managing the Information Systems Project

Address https://www.uleth.ca/bridge/hwfkvdoc.P_ViewDoc?action=Display%20REQ&global_doc=R0503764&subnum=&chngrnum=&disp_actg=yes&disp_text=printable&view_doc=Approval%20Status Go

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[Personal Information](#) [Registrar's Office and Student Services](#) [Employee](#) [Financial Services](#)

View Document

Document Approval Status and History

Doc Number: R0503764 **Doc Type:** Requisition

Originator: Brian Sullivan

Approvals Required

Queue Description Level Approvers

Approvals Recorded

Queue	Level	Date	User
CPR	1	25-OCT-2004	Eileen Ferguson

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Internet

Preview Document Purchase Order

Receiving Record

Purchase Order Header

Purchase Order #	P0501224	Change Order		Currency	Canadian Dollars	P.O. Total	16,254.82
Order Date	24-Jun-2004	Transaction Date	24-Jun-2004	Delivery Date	24-Jul-2004	Print Date	24-Jun-2004
Status	COMPLETE					P.O. Type	Regular
Requestor:	DeJong, N.						
Department	6560	Physical Education Facilities	Vendor	Fitness Depot Commercial Inc.			
Ship To	The University of Lethbridge	Buyer	Nick Bensch	Receiving Documents	<u>Y0502088</u>		

Purchase Order Commodities

Item	Commodity	Description	U/M	Quantity	Price	Ext Amount	Disc	Add	Tax	Item Cost	Requisition	Invoice	
001	G78	Athletic/Recreation Equipment & Supplies	EA	2	1,270.00	2,540.00	.00	.00	177.80	2,717.80	<u>R0501778</u>	<u>10507589</u>	
Text: Concept II Power													
002	G78	Athletic/Recreation Equipment & Supplies	EA	2	6,075.71	12,151.42	.00	.00	850.60	13,002.02	<u>R0501778</u>	<u>10507589</u>	
Text: Precor 546i Elliptical Fitness Crosstrainer (EFX) with Cross Ramp													
003	S9716	Freight Services	EA	1	500.00	500.00	.00	.00	35.00	535.00		<u>10507589</u>	
Text: Shipping to Lethbridge													
Commodity Total:											16,254.82		

Purchase Order Accounting

Item	Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Loen	Amount
001	1	9	05	12151	12151	6560	8079	4501			2,717.80
002	1	9	05	12151	12151	6560	8079	4501			13,002.02
003	1	9	05	12151	12151	6560	8079	4501			535.00
Accounting Total:											16,254.82

Click on any underlined document number to preview.

Requisition Invoice

Preview Document Receiving

The Bridge (Web Information System)

BACK TO SUB MENU SITE MAP HELP EXIT

Personal Information Registrar's Office and Student Services Employee Financial Services

View Document

Receiving Header

Receiving	Y0502088	Waybill #	119063422	Received Date	20-JUL-04
Carrier	KINDERSLEY TRANSPORT				
Receiving Method	Prepaid	Freight Charge		Broker Ref #	

Packing Slip

UofL Ref #	<u>P0501224</u>	Contact Person	DeJong, N.
Vendor Name	Fress Depot Commercial Inc.	Vendor Ref #	N/A
Content		Pieces	4
Department	Physical Education Facilities	Delivery Location	

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Click on any underlined document number to preview.

Preview Document Invoice

Purchase Order

Cheque Number

View Document

Invoice Header

Invoice #	I0507569	Credit Memo	N	Currency	Canadian Dollars	Total	16,254.82
Purchase Order #	P0501224	Invoice Date	09-Jul-2004	Transaction Date	15-Jul-2004	Payment Due Date	03-Aug-2004
Status	PAID	Cheque #	C0224917	Vendor	Fitness Depot Commercial Inc.	Vendor Invoice #	150001807

Invoice Commodities

Invoice Item	P.O. Item	Commodity	Description	U/M	Tax Group	Qty	Unit Price	Ext Amt	Disc	Add	Tax	Total
001	001	G78	Athletic/Recreation Equipment & Supplies	EA	GST	2.00	1,270.00	2,540.00	.00	.00	177.80	2,717.80
Text: Concept II Power												
002	002	G78	Athletic/Recreation Equipment & Supplies	EA	GST	2.00	6,075.71	12,151.42	.00	.00	850.60	13,002.02
Text: Precor 546i Elliptical Fitness Crosstrainer (EFX) with Cross Ramp												
003	003	S9716	Freight Services	EA	GST	1.00	500.00	500.00	.00	.00	35.00	535.00
Text: Shipping to Lethbridge												
Commodity Total:												16,254.82

Invoice Accounting

Item#	Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Approved	Disc	Tax	Add	Total	GST	Rebate	Net Amount	
1	1	9	05	12151	12151	6560	8079	4501				2,540.00	.00	177.80	.00	2,717.80	-119.13	2,598.67	
2	1	9	05	12151	12151	6560	8079	4501				12,151.42	.00	850.60	.00	13,002.02	-569.90	12,432.12	
3	1	9	05	12151	12151	6560	8079	4501				500.00	.00	35.00	.00	535.00	-23.45	511.55	
Accounting Total:																	16,254.82	-712.48	15,542.34

Click on any underlined document number to preview.

Preview Document Cheque

The Bridge (Web Information System)

BACK TO SUB MENU SITE MAP HELP EXIT

Personal Information Registrar's Office and Student Services Employee Financial Services

View Document

Cheque Header

Cheque #	C0224917	Cheque Amount	16,254.82
Bank	Bank of Montreal - Canadian	Cheque Status	Reconciled
Vendor	Fitness Depot Commercial Inc.	Cheque Date	03-AUG-2004

Invoices

Invoice #	CR Memo	Amount
<u>10507569</u>		16,254.82

RELEASE: 6.0

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