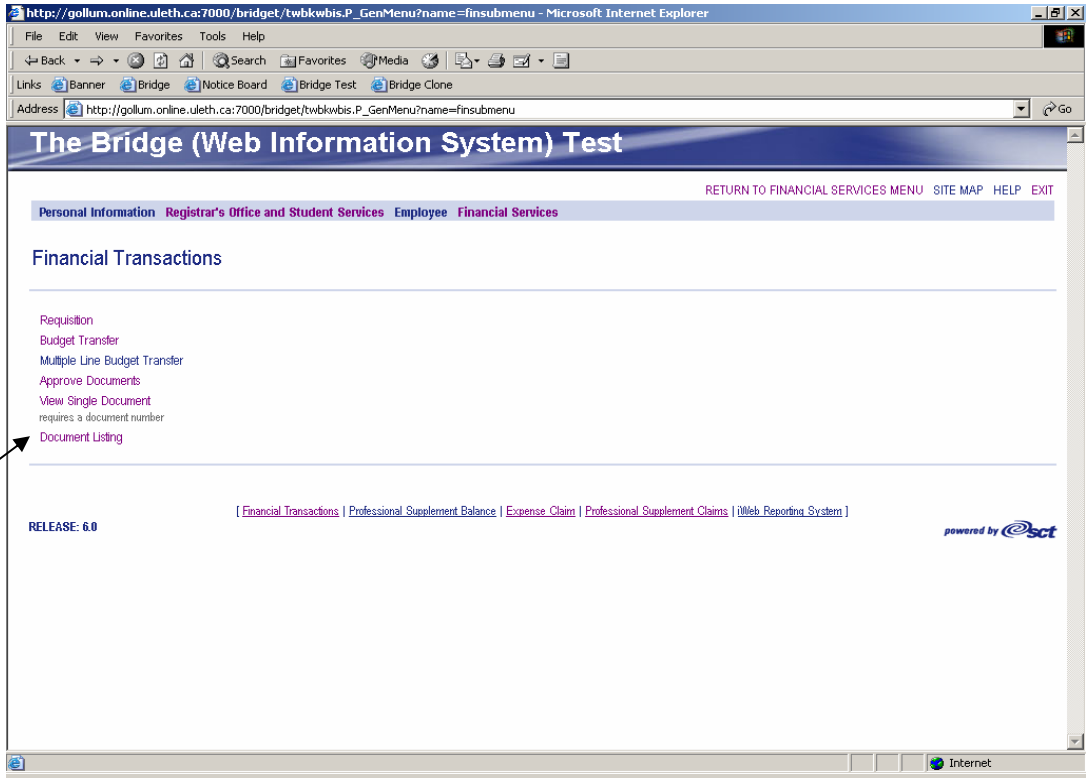
The Bridge

The University of Lethbridge
Web Information System

Online Inquiry of Requisitions

Procedure Manual
Effective September 1, 2004

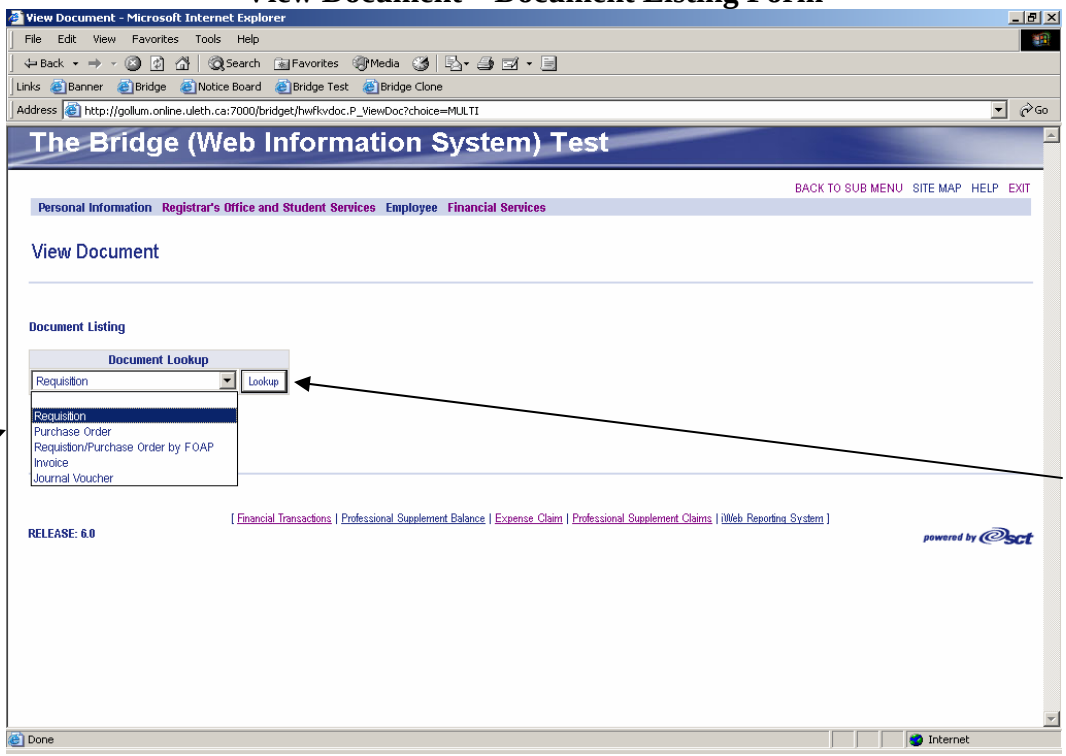
Financial Transactions Menu



Click on Document Listing

Click on the Document Listing menu item

View Document – Document Listing Form

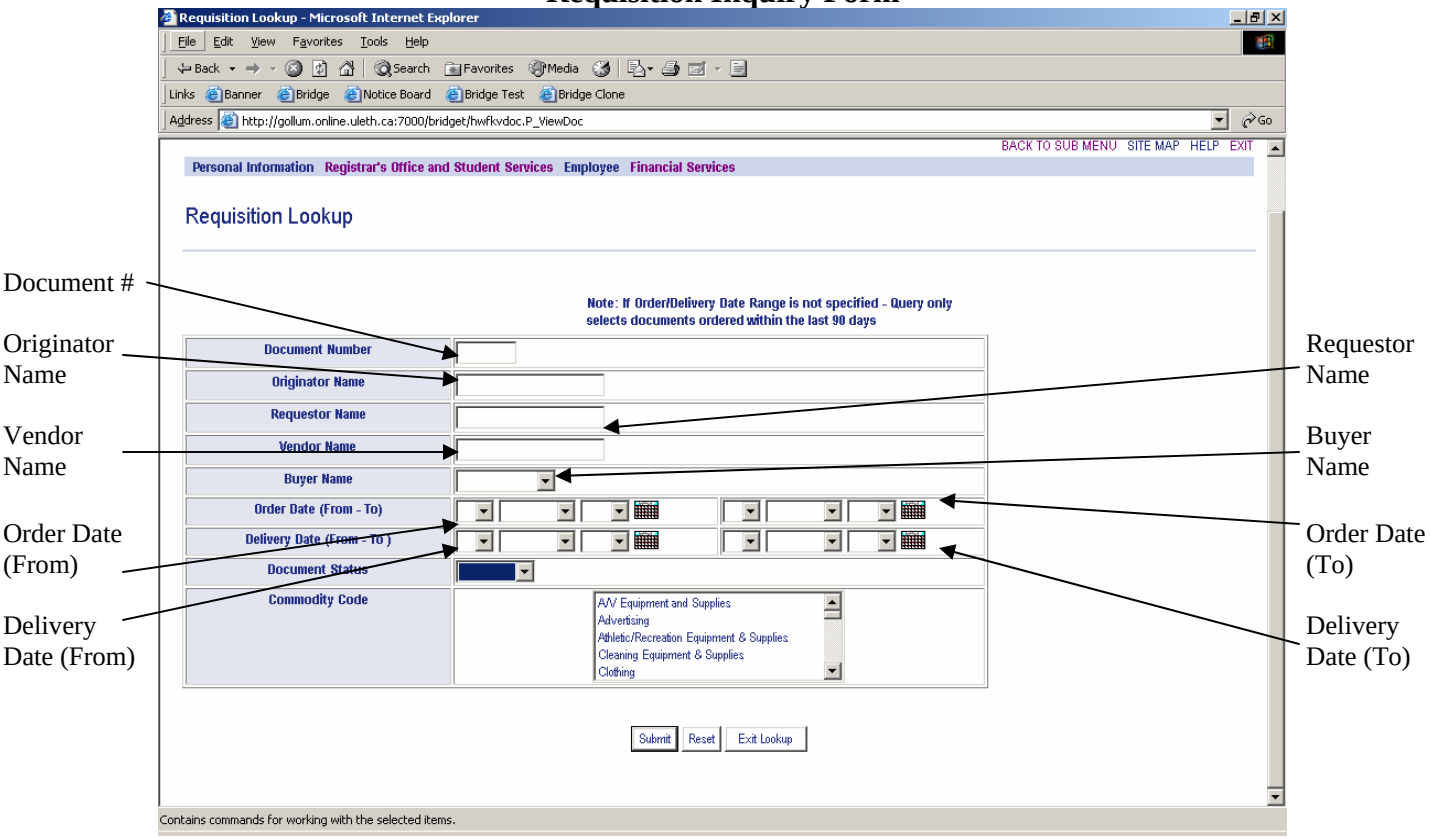


Choose Requisition

Click on Lookup

Choose Requisition from the dropdown list then click on “Lookup”

Requisition Inquiry Form



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 requisition number

Originator Name: Type in part or all of the persons name who created the requisition

Requestor Name: Type in part or all of the persons name who requisition was ordered for

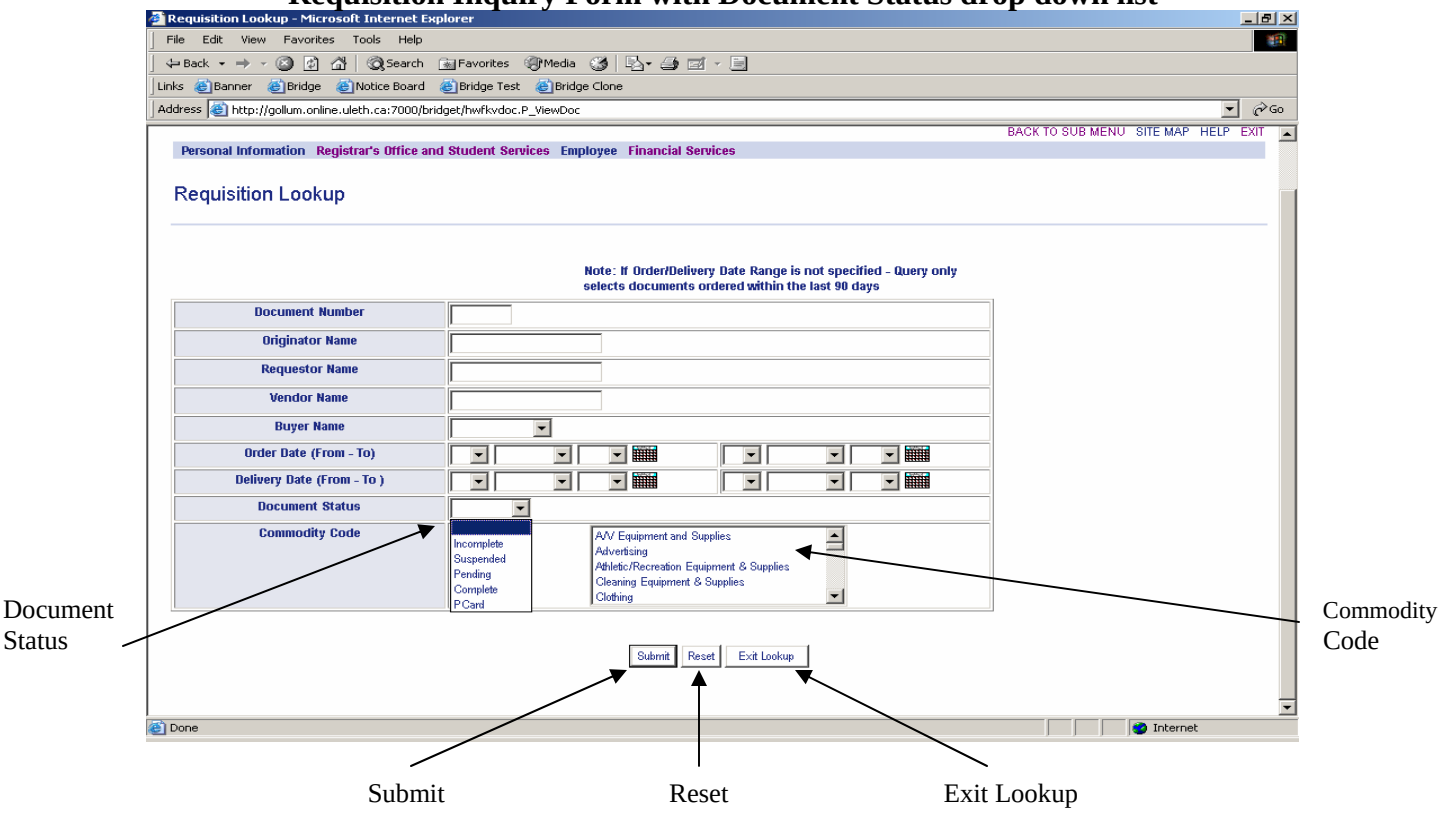
Vendor Name: Type in part or all of the vendor name

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. If a date or date range is not chosen, it 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. If a date or date range is not chosen, it will default to the last 90 days.

Requisition Inquiry Form with Document Status drop down list



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 are documents that have been saved and still need to be completed by the originator (person who initiated/posted the requisition)
Suspended:	Documents which require further processing by Financial Services. This includes all Professional Supplement, Employee Computer Purchase and Capital Project requisitions
Pending:	Documents which are waiting for approval
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 is to display all requisitions regardless of the commodity code. However you can use the scroll bar to scroll down and click on a commodity code which will display only those requisitions with that specific commodity code.

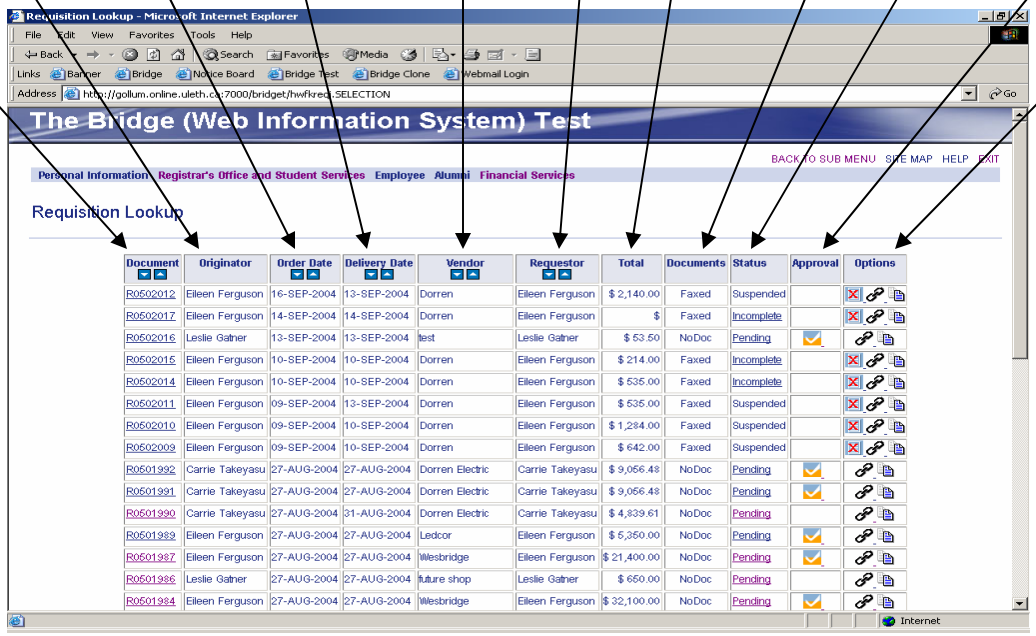
Submit: Generates a report of all requisitions according to the chosen specifications

Reset: Clears all specifications chosen

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

Requisition Inquiry Submitted

Document Originator Order Date Delivery Date Vendor Requestor Total Documents Status Approval Options



Document	Originator	Order Date	Delivery Date	Vendor	Requestor	Total	Documents	Status	Approval	Options
R0502012	Eileen Ferguson	16-SEP-2004	13-SEP-2004	Dorren	Eileen Ferguson	$ 2,140.00	Faxed	Suspended		
R0502017	Eileen Ferguson	14-SEP-2004	14-SEP-2004	Dorren	Eileen Ferguson	$	Faxed	Incomplete		
R0502016	Leslie Gatner	13-SEP-2004	13-SEP-2004	test	Leslie Gatner	$ 53.50	NoDoc	Pending		
R0502015	Eileen Ferguson	10-SEP-2004	10-SEP-2004	Dorren	Eileen Ferguson	$ 214.00	Faxed	Incomplete		
R0502014	Eileen Ferguson	10-SEP-2004	10-SEP-2004	Dorren	Eileen Ferguson	$ 535.00	Faxed	Incomplete		
R0502011	Eileen Ferguson	09-SEP-2004	13-SEP-2004	Dorren	Eileen Ferguson	$ 535.00	Faxed	Suspended		
R0502010	Eileen Ferguson	09-SEP-2004	10-SEP-2004	Dorren	Eileen Ferguson	$ 1,284.00	Faxed	Suspended		
R0502009	Eileen Ferguson	09-SEP-2004	10-SEP-2004	Dorren	Eileen Ferguson	$ 642.00	Faxed	Suspended		
R0501992	Carrie Takeyasu	27-AUG-2004	27-AUG-2004	Dorren Electric	Carrie Takeyasu	$ 9,056.48	NoDoc	Pending		
R0501991	Carrie Takeyasu	27-AUG-2004	27-AUG-2004	Dorren Electric	Carrie Takeyasu	$ 9,056.48	NoDoc	Pending		
R0501990	Carrie Takeyasu	27-AUG-2004	31-AUG-2004	Dorren Electric	Carrie Takeyasu	$ 4,839.61	NoDoc	Pending		
R0501989	Eileen Ferguson	27-AUG-2004	27-AUG-2004	Ledcor	Eileen Ferguson	$ 6,350.00	NoDoc	Pending		
R0501987	Eileen Ferguson	27-AUG-2004	27-AUG-2004	Wesbridge	Eileen Ferguson	$ 21,400.00	NoDoc	Pending		
R0501986	Leslie Gatner	27-AUG-2004	27-AUG-2004	future shop	Leslie Gatner	$ 650.00	NoDoc	Pending		
R0501984	Eileen Ferguson	27-AUG-2004	27-AUG-2004	Wesbridge	Eileen Ferguson	$ 32,100.00	NoDoc	Pending		

Document Requisition number. Click on the document number to preview the requisition.

Originator Person who posted the original document

Order Date Date requisition was completed

Delivery Date Date of expected delivery

Vendor Suggested vendor by the originator

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

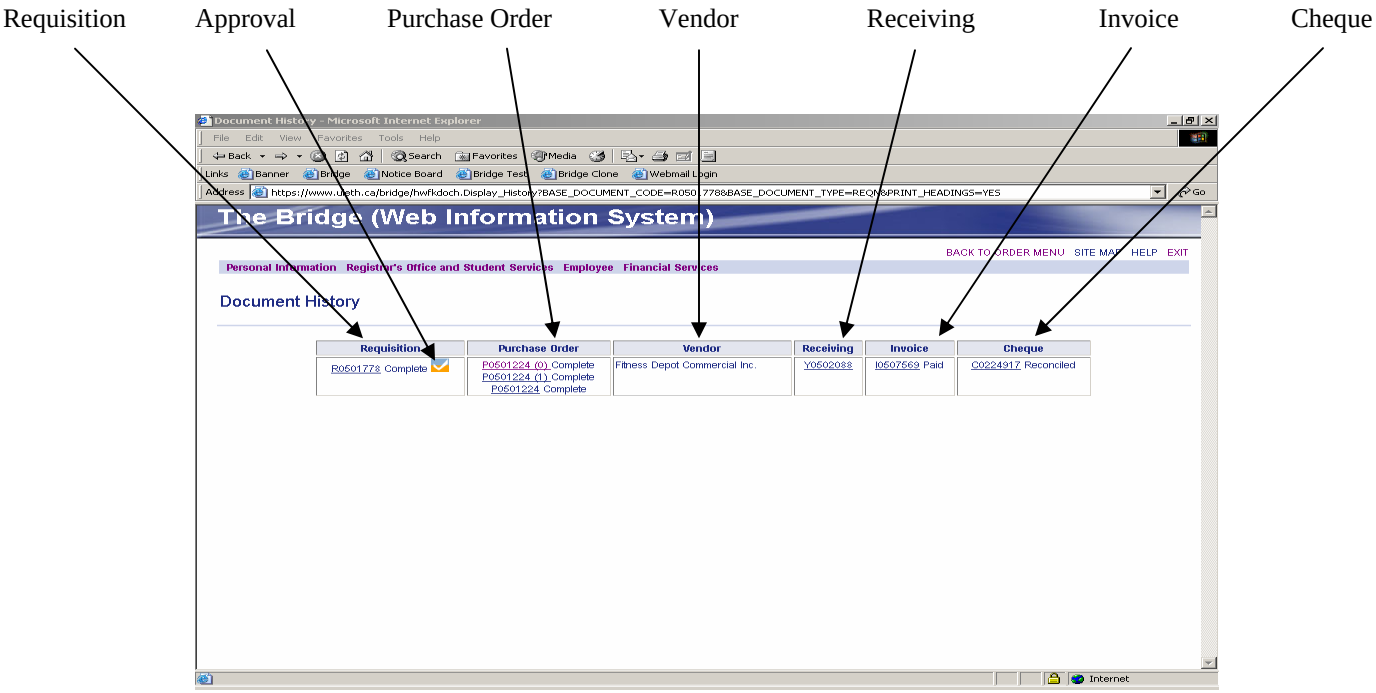
Status Displays the current status of document. See page 4 for definitions. Documents which are underlined:
Incomplete – click on to edit document. This will take you to the requisition form to continue processing.
Pending – click on to view approval status and history
Complete – click on to view approval status and history
Pcard – click on to view approval status and history

Approval If a document requires your approval, click on the checkmark, which will take you to the approval screen
As the originator, this will give you access to disapprove a document before it is complete. This will return the document to an incomplete status so that it can be edited. *

Options Used to delete a document not required. Can only be deleted by originator and only before it reaches complete status. *
This will display the document history with all related documents. Cradle to grave. See page 6.
Click on this copy function to duplicate a requisition. This will create a new document number and will take you to the requisition form to continue processing. *

* A message box will appear which will prompt you to either confirm or cancel the request.

Document History



Click on any document number to preview.

Requisition Click on the document number to preview the requisition. *

Approval Click on checkmark to view approval status and history.

Purchase Order Click on the document number to preview the purchase order. *

Vendor Will display the vendor name from the purchase order.

Receiving Click on the document number to preview the receiving document

Invoice Click on the document number to preview the invoice. *

Cheque Click on the document number to preview the cheque. *

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