

**INSTRUCTIONS FOR
RECEIVING INVOICES AGAINST
BLANKET PURCHASE ORDERS
(BPUM) IN ELLUCIAN
COLLEAGUE**

If you are connecting to the colleague system from on campus please go directly to the next slide.

If you are connecting from off campus you must first initialize a connection to the VPN. If you are unfamiliar with this process go to the link below:

<https://www.lakeheadu.ca/faculty-and-staff/departments/services/helpdesk/software/virtual-private-network>

Log into myPortal.
Select the waffle icon menu.
Select "Web UI" from the drop-down list.

The screenshot shows the Lakehead University myPortal interface. The browser address bar displays <https://erpwp.lakeheadu.ca>. The top navigation bar includes the Lakehead University logo, a search bar with the placeholder text "Type your question here", and a "Waffle Menu" icon (a 3x3 grid of squares) with a blue arrow pointing to it. The left sidebar contains a vertical menu with the following items: Home, Applicant, Student, Employee, and Alumni. The main content area features a large banner with a pink flower background and the text "Good morning, I" and "You have 15060 unread email". A blue arrow points from the banner to the "Select Colleague – Web UI" option in the Waffle Menu dropdown. The Waffle Menu dropdown is open, showing a list of links: myCourseLink, myEmail, Library, Romeo Research Portal, Colleague - Web UI, Helpdesk Ticket System, MySuccess, myCalendar, myDrive, Concur, and LinkedIn Learning. Below the banner, there is an "Announcements" section with the date "November 16, 2019" and the title "Preparing for December 2019 Exams". The announcement text reads: "Important December Exam Information. It is not too early to start preparing for your December exams!". The bottom of the page shows the start of a numbered list: "1. Make sure you have a Lakehead University Student ID".

Log into myPortal.
Select the waffle icon menu.
Select "Web UI" from the drop-down list.

Waffle Menu

Good morning, I
You have 15060 unread email

Select Colleague – Web UI

myCourseLink
myEmail
Library
Romeo Research Portal
Colleague - Web UI
Helpdesk Ticket System
MySuccess
myCalendar
myDrive
Concur
LinkedIn Learning

Announcements

November 16, 2019

Preparing for December 2019 Exams

Important December Exam Information

It is not too early to start preparing for your December exams!

1. Make sure you have a Lakehead University Student ID

Click the navigation menu to expand.
Select CF from the application list at the top.
Select/expand the "Purchasing - PU" menu.
Select/expand the "Blanket Purchase Order - BPM" menu.
Select "Blanket PO Use Maintenance - BPUM."

The screenshot shows the ellucian application interface. At the top, there is a dark blue header with the ellucian logo on the left, a search bar in the center, and 'Navigate', 'Log Out', and a settings gear icon on the right. Below the header is a horizontal navigation bar with tabs labeled 'BROWSE BY APPLICATION', 'UT', 'CORE', 'CF', 'ST', 'HE', and 'CA'. The 'CF' tab is selected and highlighted in dark blue. Below this bar is a list of application categories, each with a downward arrow icon. The categories are: 'Accounts Payable - AP', 'Budget Management - BU', 'Fixed Assets - FX', 'General Ledger - GL', 'Purchasing - PU', 'Vendor Maintenance - VEN', 'Approvals - APR', 'Requisitions - REQ', 'Purchase Orders - POM', 'Blanket Purchase Orders - BPM', and 'Goods and Services Receiving - GSR'. The 'Purchasing - PU' and 'Blanket Purchase Orders - BPM' categories are expanded, showing their sub-items. The 'Purchasing - PU' sub-items are 'Vendor Maintenance - VEN', 'Approvals - APR', 'Requisitions - REQ', and 'Purchase Orders - POM'. The 'Blanket Purchase Orders - BPM' sub-items are 'Blanket PO Item Orders List - BPIL', 'Blanket PO Use Maintenance - BPUM', 'Blanket PO Inquiry - BINQ', 'Blanket PO GL Hist Summary - BGLS', and 'Blanket PO GL Hist Detail - BGLD'. A large blue arrow points from the top right towards the 'CF' tab with the text 'Click Navigation Menu to expand'. Another large blue arrow points from the 'CF' tab towards the 'Purchasing - PU' category with the text 'Select CF from the Application pull down'. A third large blue arrow points from the 'Purchasing - PU' category towards the 'Blanket Purchase Orders - BPM' category with the text 'Select from the purchasing -PU menu then BPM then BPUM'. A fourth large blue arrow points from the 'Blanket Purchase Orders - BPM' category towards the 'Blanket PO Use Maintenance - BPUM' sub-item with the text 'Select Blanket PO Use Maintenance - BPUM'.

ellucian

Click Navigation Menu to expand

BROWSE BY APPLICATION UT CORE CF ST HE CA

Select CF from the Application pull down

Select from the purchasing -PU menu then BPM then BPUM

- Accounts Payable - AP
- Budget Management - BU
- Fixed Assets - FX
- General Ledger - GL
- Purchasing - PU
 - Vendor Maintenance - VEN
 - Approvals - APR
 - Requisitions - REQ
 - Purchase Orders - POM
- Blanket Purchase Orders - BPM
 - Blanket PO Item Orders List - BPIL
 - Blanket PO Use Maintenance - BPUM
 - Blanket PO Inquiry - BINQ
 - Blanket PO GL Hist Summary - BGLS
 - Blanket PO GL Hist Detail - BGLD
- Goods and Services Receiving - GSR

Enter the four-digit purchase order number into the BPO Lookup field of the dialogue box. Click OK

The image shows a software interface for managing Blanket Purchase Orders (BPOs). A 'BPO Lookup' dialogue box is overlaid on the main 'BPUM - Blanket PO Use Maintenance' screen. The dialogue box has a text input field labeled 'BPO Lookup' and buttons for 'Ok', 'Cancel', 'Finish', and 'Help'. A blue arrow points from the text 'Type the 4 digit Purchase Order number then hit the enter key.' to the input field. The main screen has a dark blue header with the 'ellucian' logo and a 'Log Out' button. A left sidebar contains navigation icons. The main content area has a light gray background with various input fields and labels. At the bottom, there are three yellow-highlighted fields: 'GL Account No', 'GL Account Description', and 'Project Number'.

ellucian

BPUM - Blanket PO Use Maintenance

Log Out

BPO Lookup

Type the 4 digit Purchase Order number then hit the enter key.

Ok Cancel Finish Help

BPO Number : Status : Status Date :
BPO Amount : Expensed : Diff :

Vendor

Commodity

Description

Qty Ordered Qty Accepted

Unit of Issue Packing Slip

Order Date Received Date

Initiator Received By

Expected Cost Actual Cost

Expected Date Form/Box/Loc

GL Account No GL Account Description Project Number

Enter the description from the invoice in the Description field.

Enter the Quantity Ordered date and the Quantity Accepted date in the corresponding fields.

Enter the Initiator in the Initiator Field. This is your login name.

In the Actual Cost field, enter the amount you wish to be paid to the vendor; this is usually the balance listed on the invoice.

The screenshot shows the 'ellucian' web application interface for 'BPUM: Blanket PO Use Maintenance'. The form contains the following fields and callouts:

- Header:** ellucian logo, user profile, document icon, 'BPUM: Blanket PO Use Maintenance' title, 'Navigate' button, 'Log Out' button, and settings icon.
- Context Bar:** 'No Active Context. Search for People or open Favorites to get started'.
- Form Header:** 'BPUM - Blanket PO Use Maintenance' with 'Save', 'Save All', 'Cancel', and 'Cancel All' buttons.
- Summary:** BPO Number: B0005730, Status: Outstanding, Status Date: 18/11/30, BPO Amount: 6,000.00, Expensed: 6,000.00.
- Vendor:** 1 Richard J. Francis
- Commodity:** (empty field)
- Description:** A table with 2 rows. Callout: 'Enter the description from the invoice' points to the first row.
- Quantity Ordered:** (empty field) with callout: 'Enter 1'.
- Unit of Issue:** (empty field)
- Order Date:** 18/11/30
- Initiator:** (empty field) with callout: 'Initiator = Enter your login'.
- Quantity Accepted:** (empty field) with callout: 'Enter 1'.
- Packing Slip:** (empty field)
- Received Date:** (empty field)
- Received By:** (empty field)
- Actual Cost:** (empty field) with callout: 'In Actual Cost Enter the amount you wish to be paid to the vendor usually the balance from the invoice'.
- Form/Box/Loc:** (empty field)

When you are done entering, click
SAVE at the top of the screen.



In the dialogue box that opens,
click UPDATE.

