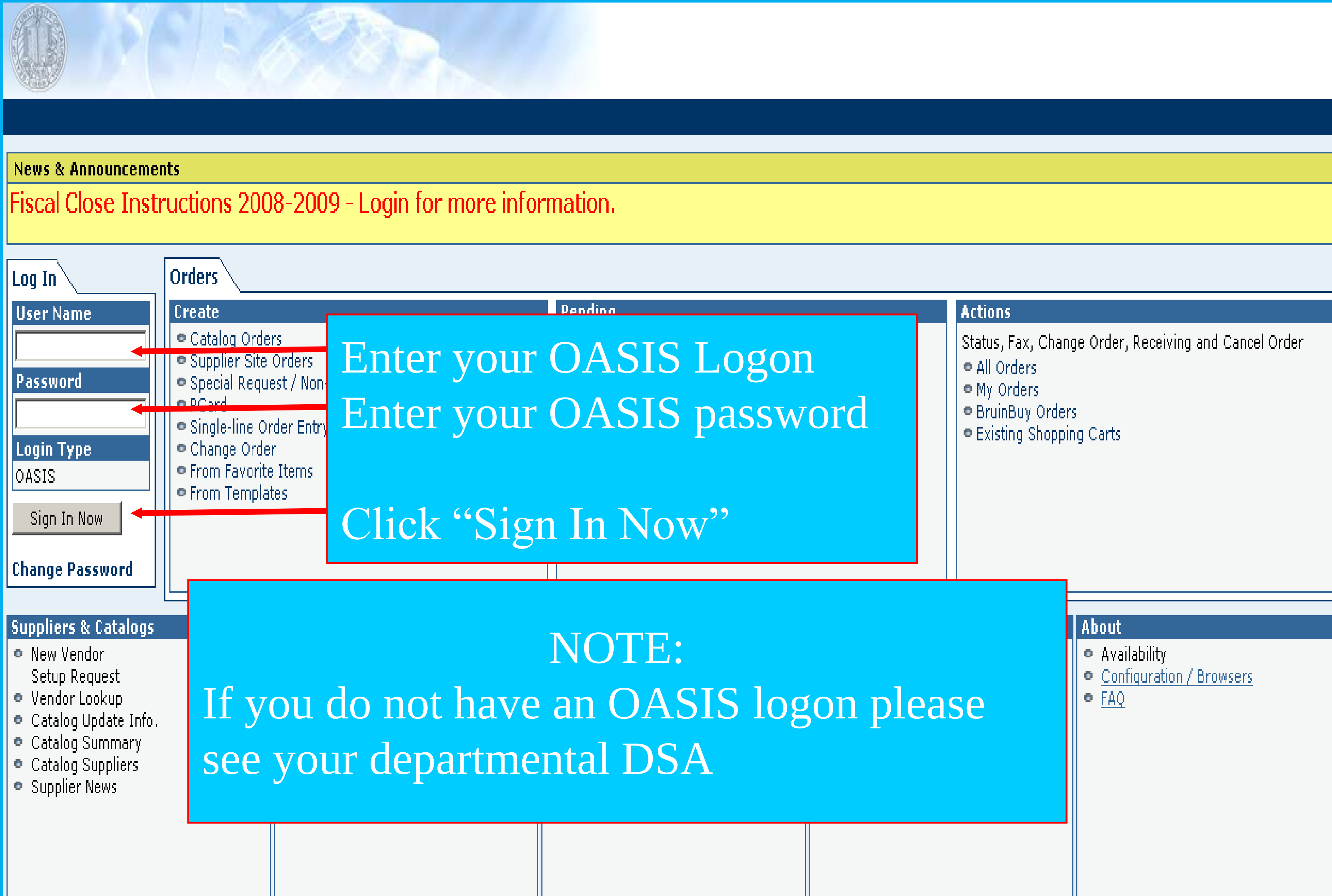
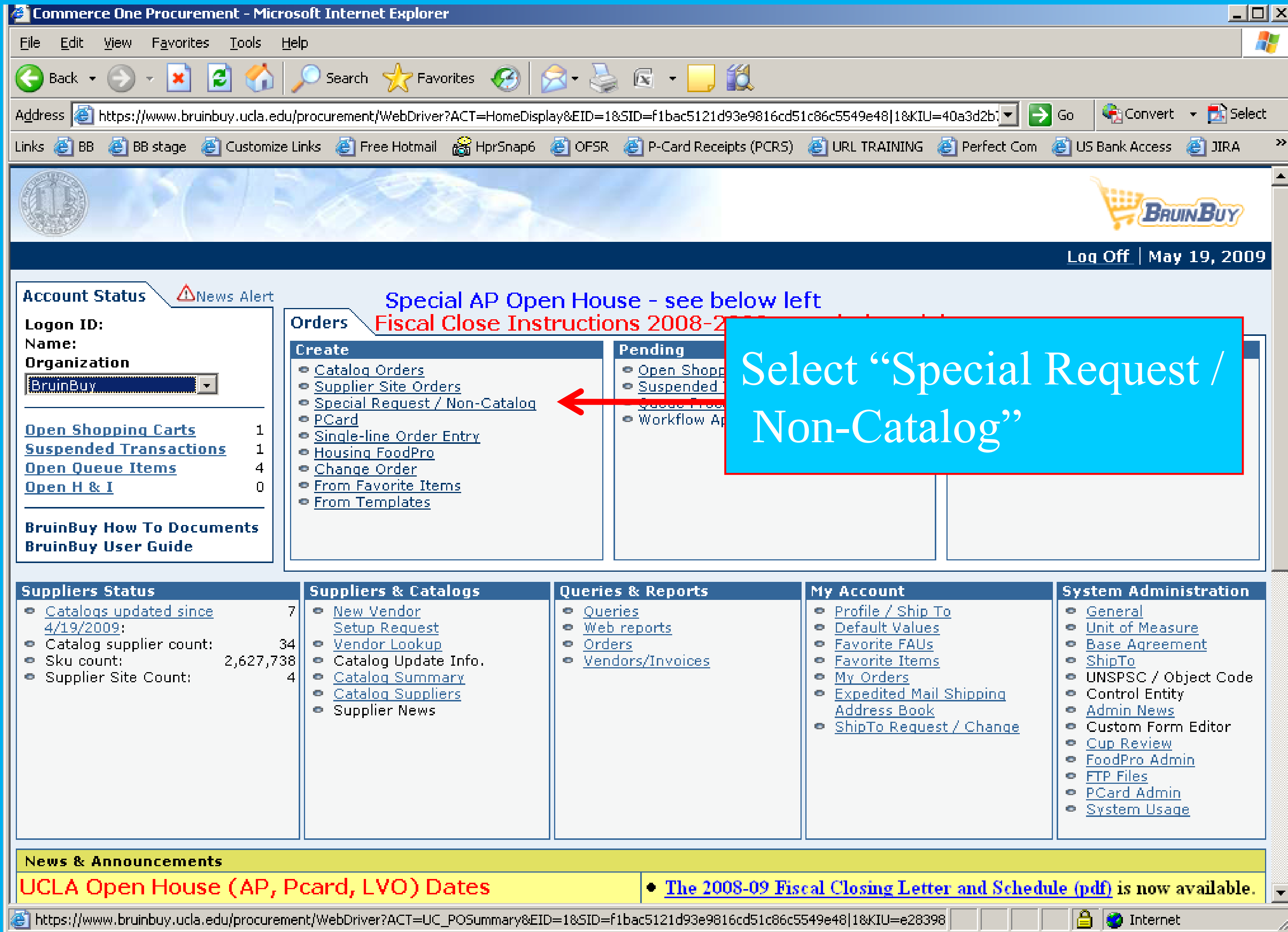
How to…
Submit “J” & “R” Requisitions with Attachments
7/1/2009



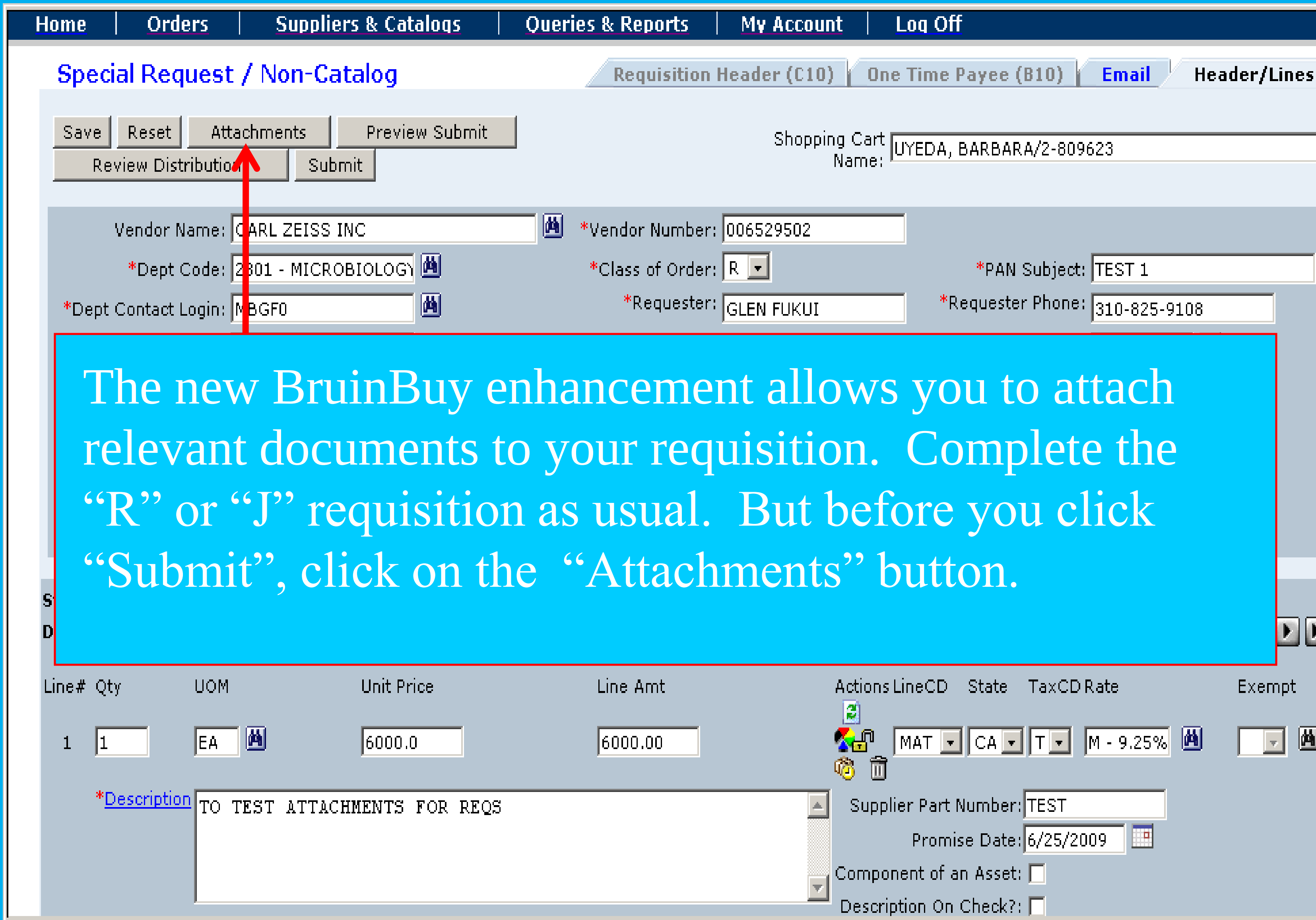
Enter your OASIS Logon
Enter your OASIS password

Click “Sign In Now”

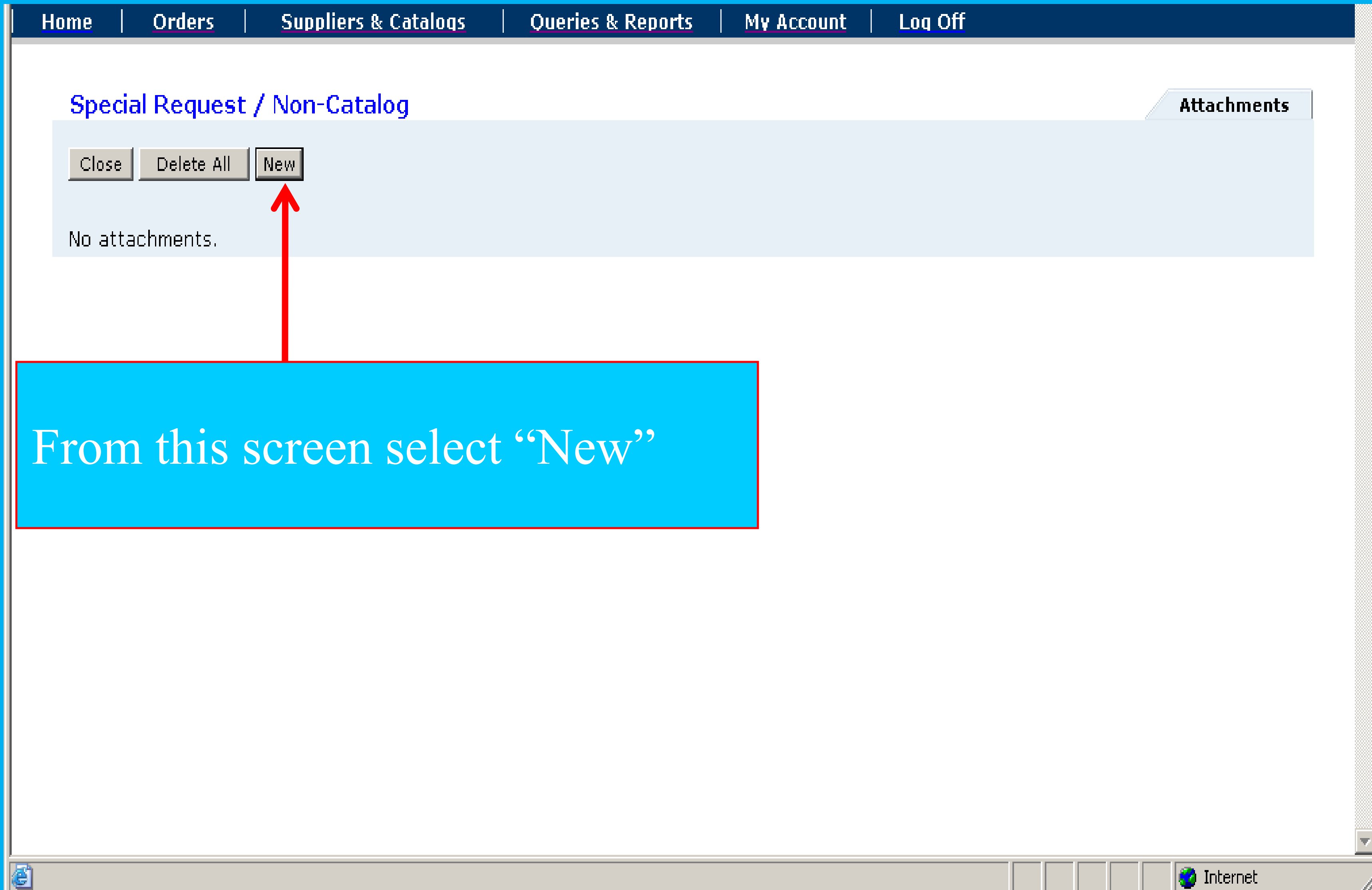
NOTE:
If you do not have an OASIS logon please see your departmental DSA

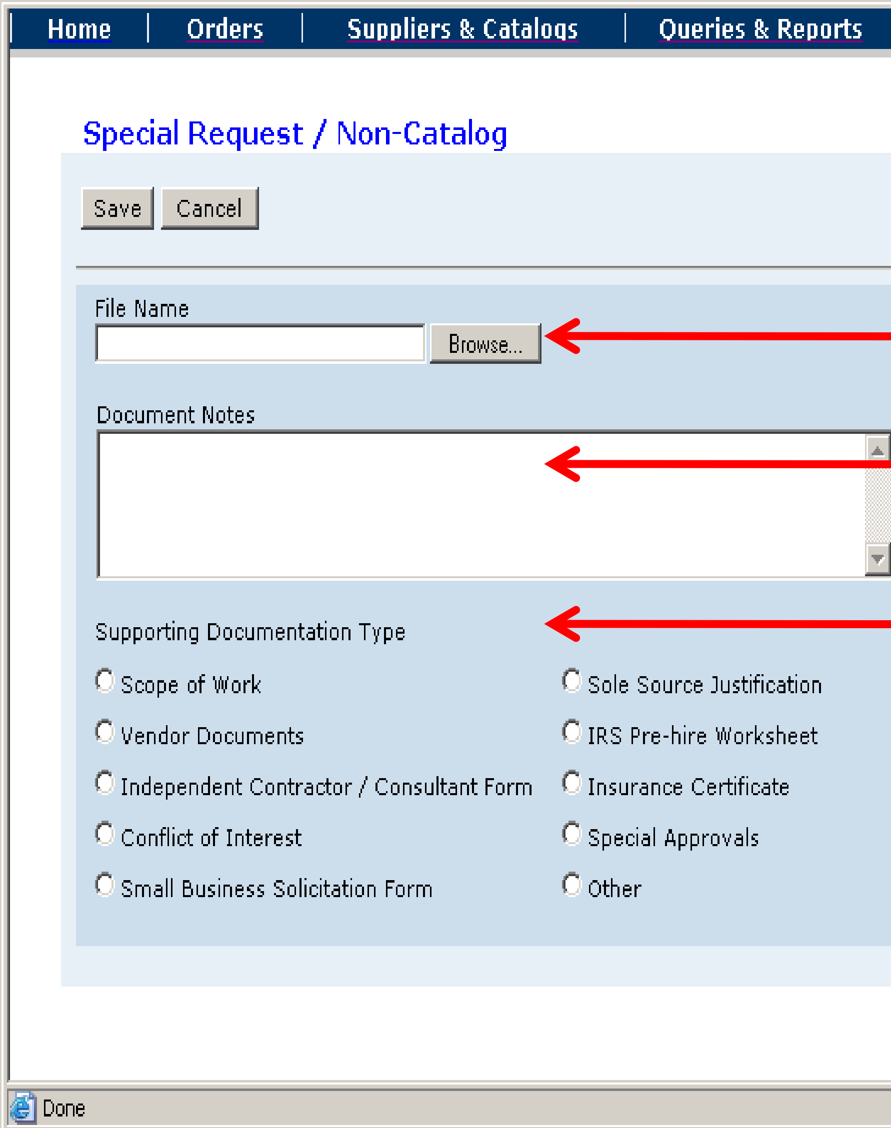


Select “Special Request / Non-Catalog”



The new BruinBuy enhancement allows you to attach relevant documents to your requisition. Complete the "R" or "J" requisition as usual. But before you click "Submit", click on the "Attachments" button.


Home
Orders
Suppliers & Catalogs
Queries & Reports
My Account
Log Off
Special Request / Non-Catalog
Attachments
Close
Delete All
New
No attachments.
From this screen select “New”
Internet



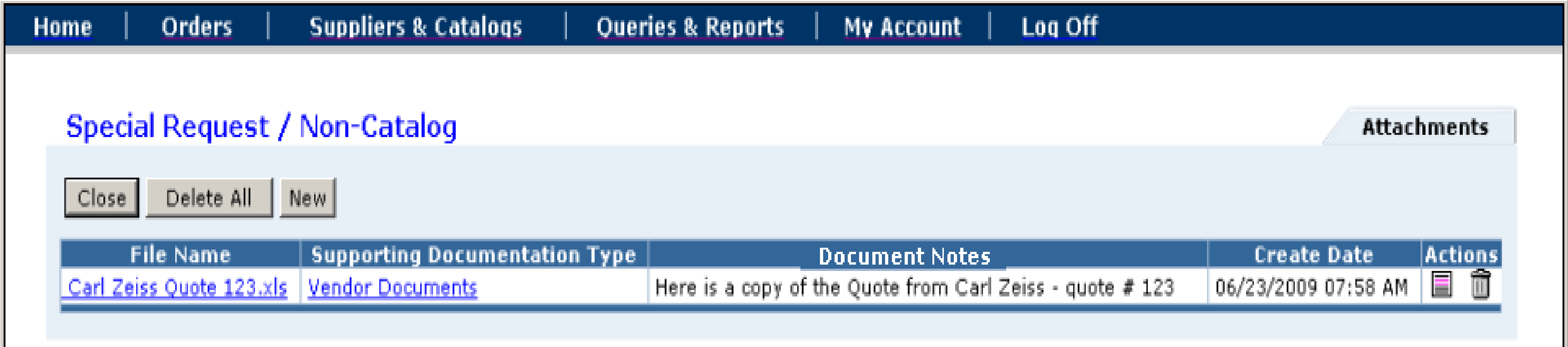
To start adding your attachment(s), click the “Browse” button next to the “File Name” field.

Add comments or other information relating to this attachment in the “Document Notes” field.

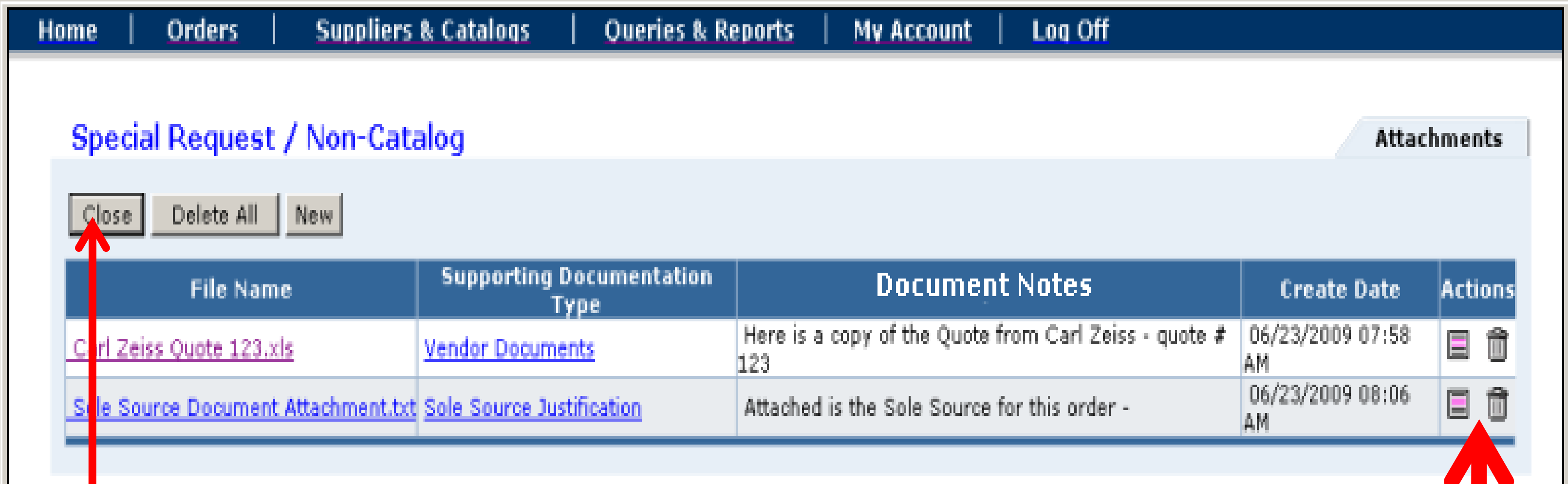
Under “Supporting Documentation Type” select the appropriate title. Select “Other” for any document not listed.

Validation requires you to input data in all three sections. Failure to do so will generate an “error”.

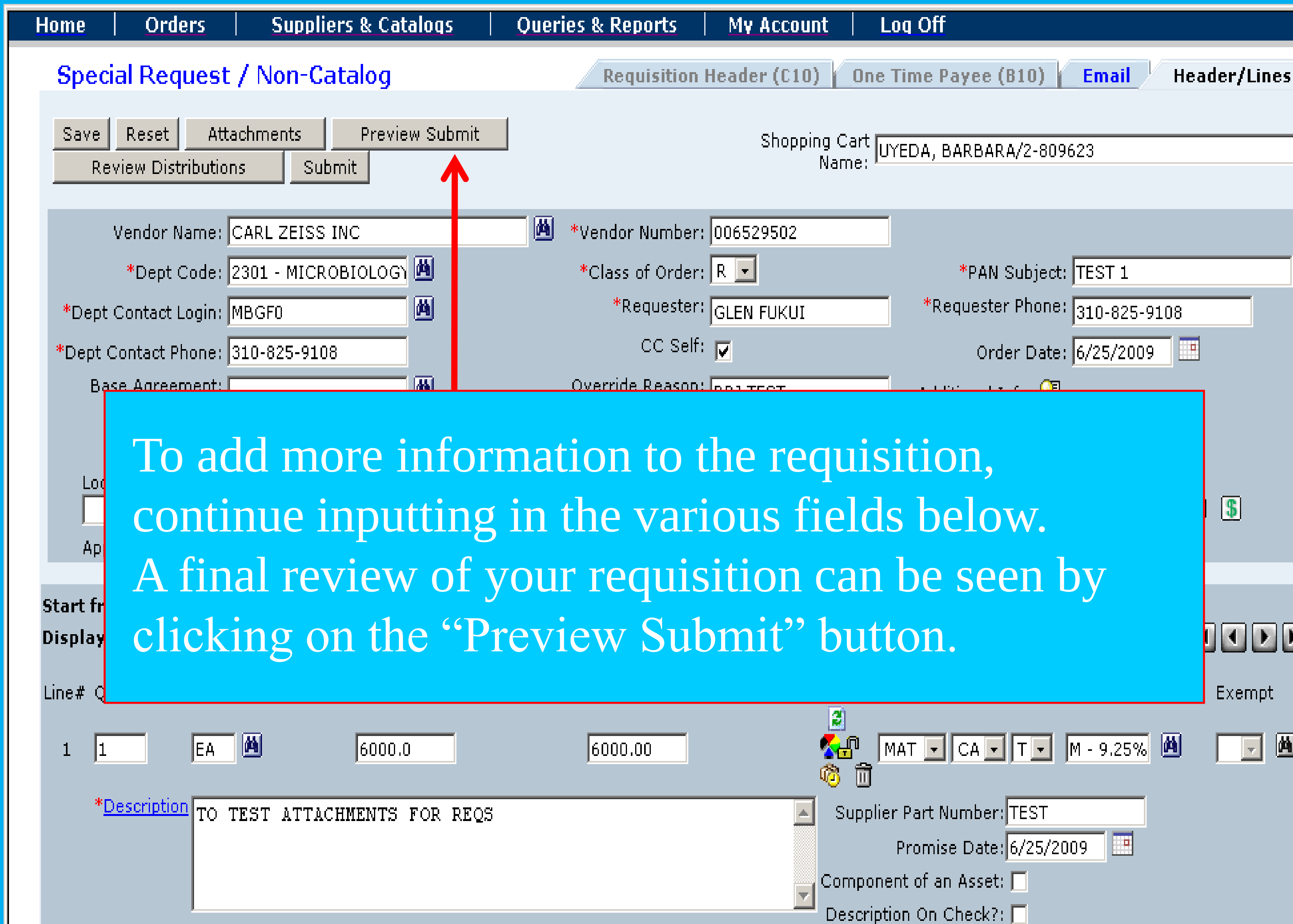
When you are finished click “Save”



Once the document is attached, you will be returned to this screen where your attachment is now listed. To add additional documents, repeat this procedure.

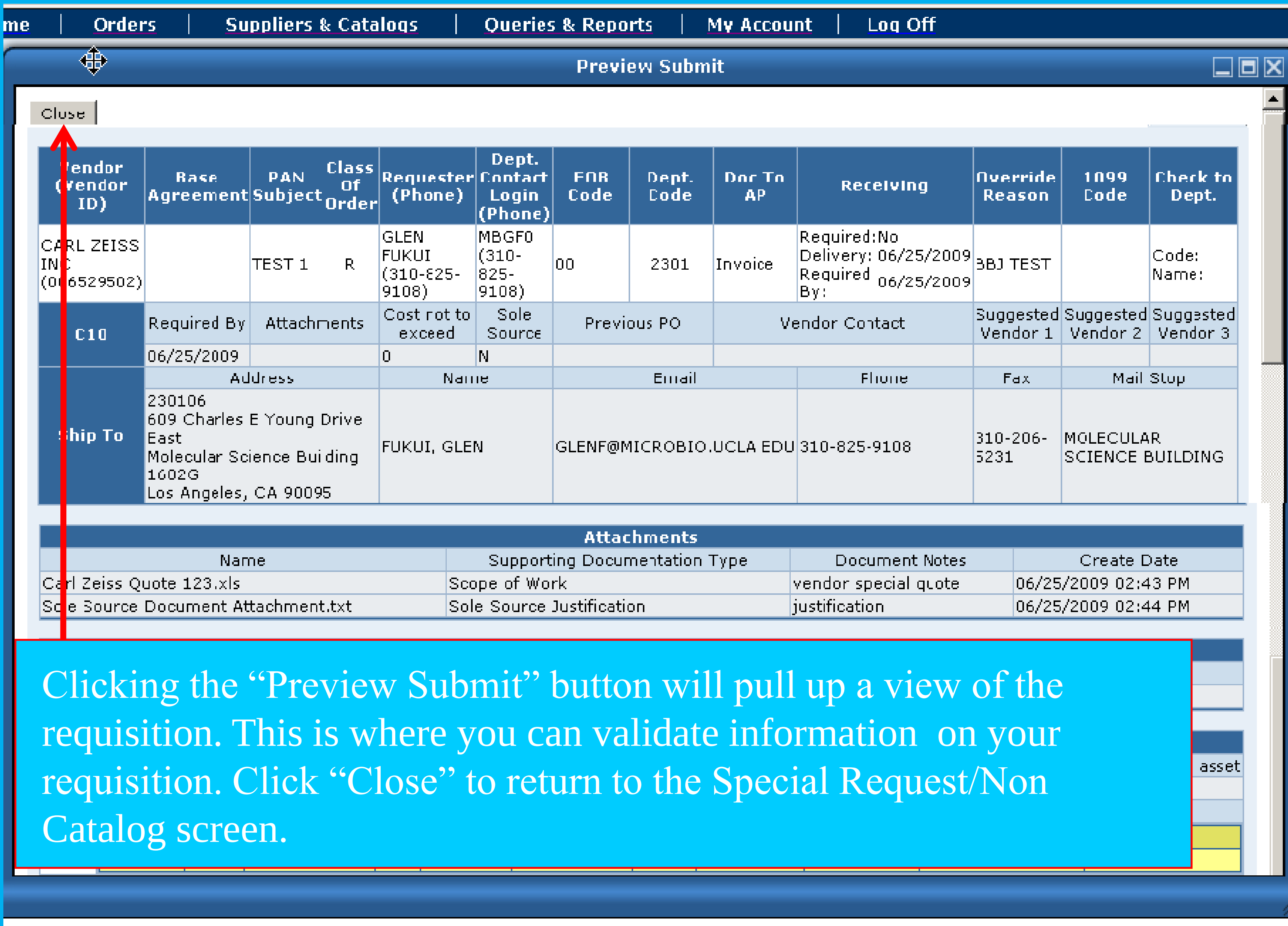


This screenshot displays the documents attached to your requisition. From this screen you have the option of opening your attachment via the “View/Save” icon or deleting an attachment via the “Trash Can” icon. Click “Close” and you will be returned to the Special Request/Non Catalog screen.

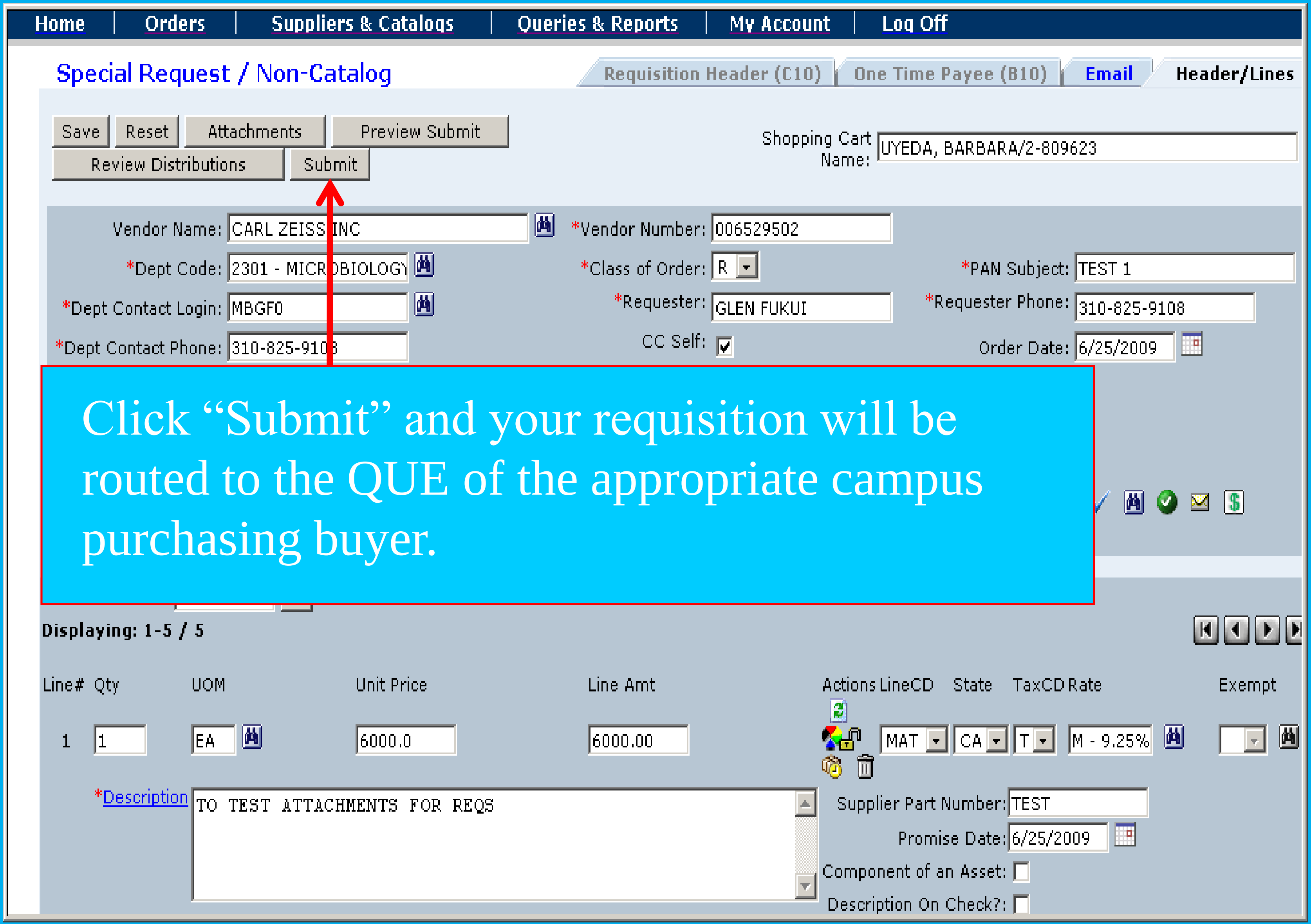


To add more information to the requisition, continue inputting in the various fields below.

A final review of your requisition can be seen by clicking on the “Preview Submit” button.



Clicking the "Preview Submit" button will pull up a view of the requisition. This is where you can validate information on your requisition. Click "Close" to return to the Special Request/Non Catalog screen.



Click "Submit" and your requisition will be routed to the QUE of the appropriate campus purchasing buyer.

Additional Tips on the “Attachments” Function

1. Today, the Attachments are only for the “R” and “J” requisitions.
2. Once you click “Submit” your requisition will be assigned to a campus purchasing buyer. If your requisition has not been made into a purchase order you have the option to create a change order to the requisition. It is suggested that you contact the buyer before you create the change order requisition.
3. Once the buyer creates the PO and the PO is posted, all users will see the complete transaction in the Action section, “All Orders”.
4. The department end-user who created the order can do a “Copy” to any posted order within their department. The complete “Copy” will display the full attachments. Departments are not allowed to copy orders outside their department. The validation authorization is linked to the home department payroll records logon ID.
5. Campus purchasing buyers are the only ones who can view and print any department order attachments after the PO has been posted.
6. Please use the “Attachments” function whenever you need to attach documentation to the requisition.
7. Any suggestions/enhancements to the “Attachments” function need to be sent to bruinbuy@finance.ucla.edu.

References

- Email bruinbuy@finance.ucla.edu
- BruinBuy Help Desk at (310) 794-6013
- Email purchasing@finance.ucla.edu
- For complete overview of BruinBuy Training please go to www.chr.ucla.edu to sign up for training classes
- www.purchasing.ucla.edu – UCLA Portal