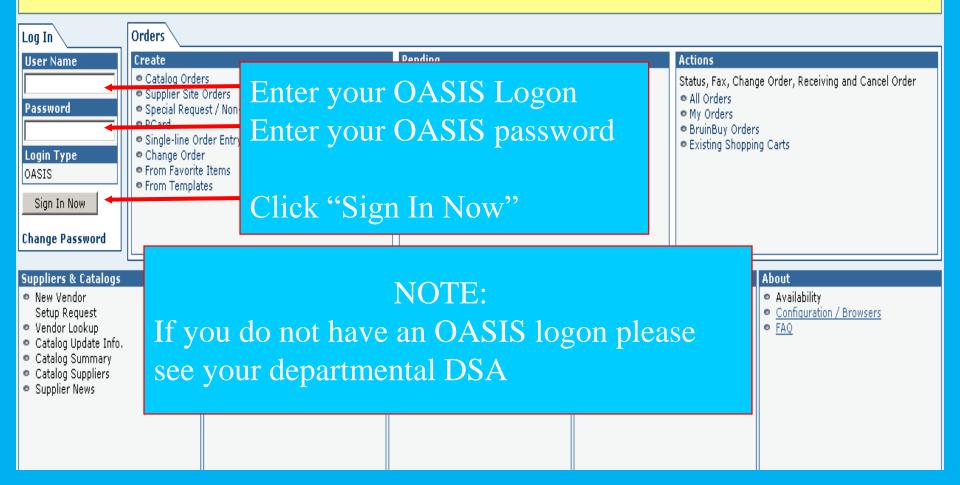
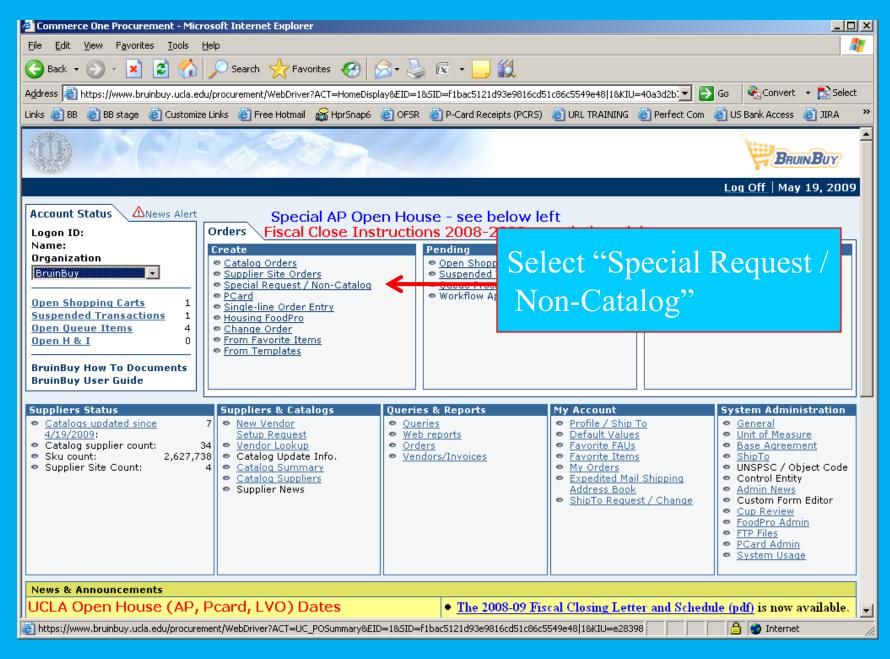
How to... Submit "J" & "R" Requisitions with Attachments 7/1/2009

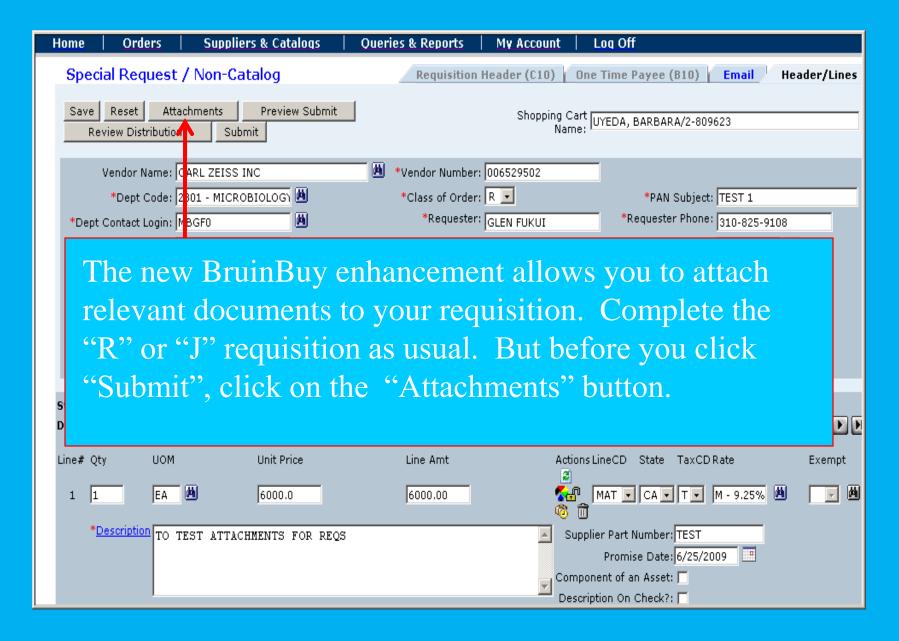


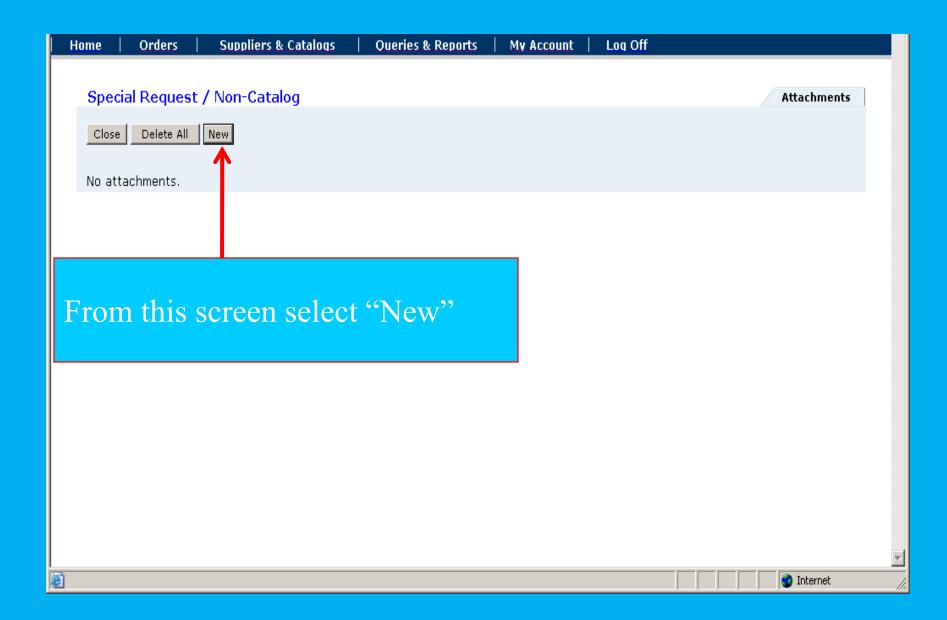
News & Announcements

Fiscal Close Instructions 2008-2009 - Login for more information.









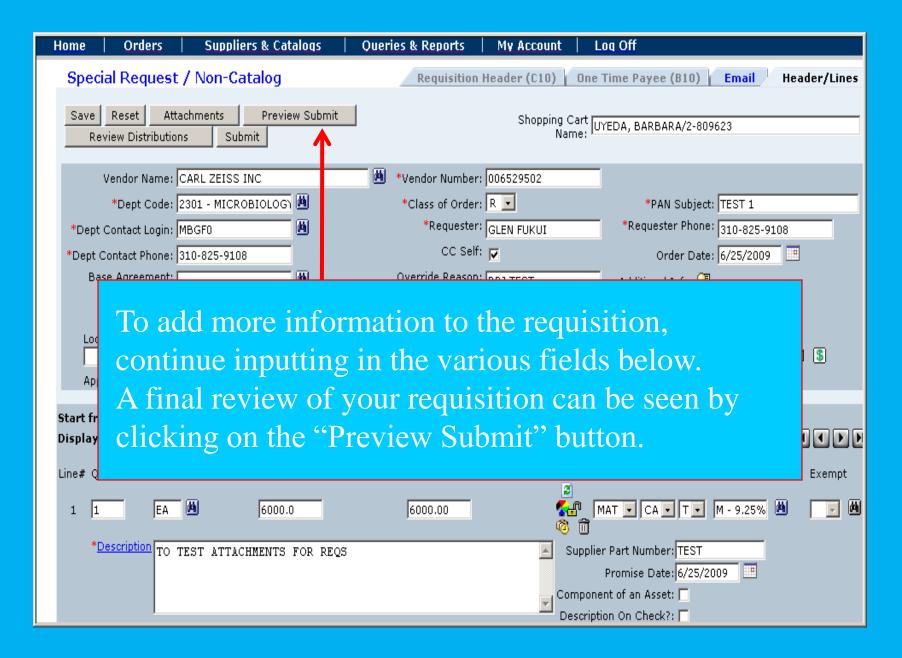
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	C Sco C Ver C Ind C Cor	orting Document ope of Work ador Documents ependent Contr offict of Interest all Business Sol	actor / Consultant Form	 Sole Source Justification IRS Pre-hire Worksheet Insurance Certificate Special Approvals Other 	Type" se Select "C listed. Validatio in all thre	Supporting Documenta lect the appropriate tit Other" for any docume on requires you to inpu ee sections. Failure to erate an "error".	ile. ent not it data		
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Home Orders	Suppliers & Catalogs 🔰 Quer	ies & Reports My Account	Log Off								
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Close Delete All New											
File Name	Supporting Documentation Type	Document Notes		Create Date	Actions						
Carl Zeiss Quote 123.xls	Vendor Documents	Here is a copy of the Quote from Carl Z	eiss - quote # 123	06/23/2009 07:58 AM							

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.

Special Request / No	n-Catalog		Attac	hments
Close Delete All New				
	Supporting Documentation	Document Notes	Create Date	Actions
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File Name C rl Zeiss Quote 123.xls	Type Vendor Documents	Here is a copy of the Quote from Carl Zeiss - quote # 123	06/23/2009 07:58 AM	ΞÛ

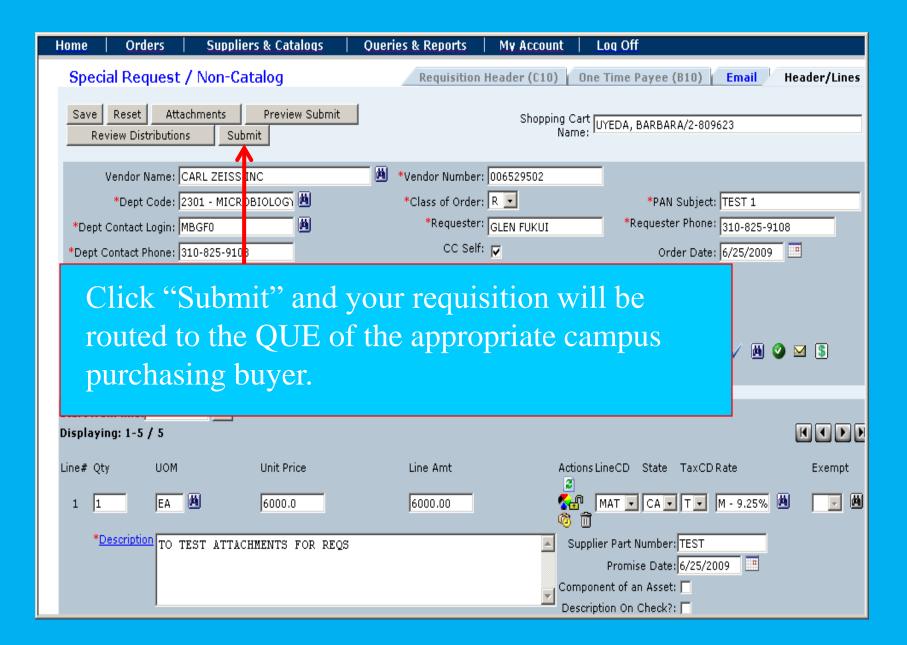
This screenshot displays the documents attached to your requisition. From this screen you have the option of opening your attachment via the "View/Save" icon or deleting an attachment via the "Trash Can" icon. Click "Close" and you will be returned to the Special Request/Non Catalog screen.



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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.

asset



Additional Tips on the "Attachments" Function

- 1. Today, the Attachments are only for the "R" and "J" requisitions.
- 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.
- 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.
- Campus purchasing buyers are the only ones who can view and print any department order attachments after the PO has been posted.
- Please use the "Attachments" function whenever you need to attach documentation to the requisition.
- Any suggestions/enhancements to the "Attachments" function need to be sent to bruinbuy@finance.ucla.edu.

References

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