

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



## News & Announcements

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

### Log In

User Name

Password

Login Type  
OASIS

Sign In Now

Change Password

### Orders

Create

- Catalog Orders
- Supplier Site Orders
- Special Request / Non
- PCard
- Single-line Order Entry
- Change Order
- From Favorite Items
- From Templates

Pending

### Actions

Status, Fax, Change Order, Receiving and Cancel Order

- All Orders
- My Orders
- BruinBuy Orders
- Existing Shopping Carts

### Suppliers & Catalogs

- New Vendor Setup Request
- Vendor Lookup
- Catalog Update Info.
- Catalog Summary
- Catalog Suppliers
- Supplier News

### About

- [Availability](#)
- [Configuration / Browsers](#)
- [FAQ](#)

**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**

Commerce One Procurement - Microsoft Internet Explorer

Address: https://www.bruinbuy.ucla.edu/procurement/WebDriver?ACT=HomeDisplay&EID=1&SID=f1bac5121d93e9816cd51c86c5549e48|1&KIU=40a3d2b;

Log Off | May 19, 2009

**Account Status** News Alert

Logon ID:  
Name:  
Organization:  
BruinBuy

Open Shopping Carts: 1  
Suspended Transactions: 1  
Open Queue Items: 4  
Open H & I: 0

**Orders**

Special AP Open House - see below left  
Fiscal Close Instructions 2008-2009

**Create**

- Catalog Orders
- Supplier Site Orders
- Special Request / Non-Catalog
- PCard
- Single-line Order Entry
- Housing FoodPro
- Change Order
- From Favorite Items
- From Templates

**Pending**

- Open Shopping Carts
- Suspended Transactions
- Workflow Applications

Select "Special Request / Non-Catalog"

**Suppliers Status**

- Catalogs updated since 4/19/2009: 7
- Catalog supplier count: 34
- SKU count: 2,627,738
- Supplier Site Count: 4

**Suppliers & Catalogs**

- New Vendor Setup Request
- Vendor Lookup
- Catalog Update Info.
- Catalog Summary
- Catalog Suppliers
- Supplier News

**Queries & Reports**

- Queries
- Web reports
- Orders
- Vendors/Invoices

**My Account**

- Profile / Ship To
- Default Values
- Favorite FAUs
- Favorite Items
- My Orders
- Expedited Mail Shipping
- Address Book
- ShipTo Request / Change

**System Administration**

- General
- Unit of Measure
- Base Agreement
- ShipTo
- UNSPSC / Object Code
- Control Entity
- Admin News
- Custom Form Editor
- Cup Review
- FoodPro Admin
- FTP Files
- PCard Admin
- System Usage

**News & Announcements**

**UCLA Open House (AP, Pcard, LVO) Dates**

- The 2008-09 Fiscal Closing Letter and Schedule (pdf) is now available.

https://www.bruinbuy.ucla.edu/procurement/WebDriver?ACT=UC\_POsummary&EID=1&SID=f1bac5121d93e9816cd51c86c5549e48|1&KIU=e28398




Special Request / Non-Catalog

Save | Reset | Attachments | Preview Submit  
Review Distribution | Submit

Shopping Cart Name: UYEDA, BARBARA/2-809623

Vendor Name: CARL ZEISS INC \*Vendor Number: 006529502  
\*Dept Code: 2301 - MICROBIOLOGY \*Class of Order: R \*PAN Subject: TEST 1  
\*Dept Contact Login: MBGF0 \*Requester: GLEN FUKUI \*Requester Phone: 310-825-9108

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.

Line#	Qty	UOM	Unit Price	Line Amt	Actions	LineCD	State	TaxCD	Rate	Exempt
1	1	EA	6000.0	6000.00	  	MAT	CA	T	M - 9.25%	<input type="checkbox"/>
<u>*Description</u> TO TEST ATTACHMENTS FOR REQS					Supplier Part Number: TEST Promise Date: 6/25/2009 Component of an Asset: <input type="checkbox"/> Description On Check?: <input type="checkbox"/>					

## Special Request / Non-Catalog

**Attachments**

No attachments.

From this screen select "New"



Home | Orders | Suppliers & Catalogs | Queries & Reports | My Account | Log Off

### Special Request / Non-Catalog

Attachments > New

Save Cancel

File Name  Browse...

Document Notes

Supporting Documentation Type

<input type="radio"/> Scope of Work	<input type="radio"/> Sole Source Justification
<input type="radio"/> Vendor Documents	<input type="radio"/> IRS Pre-hire Worksheet
<input type="radio"/> Independent Contractor / Consultant Form	<input type="radio"/> Insurance Certificate
<input type="radio"/> Conflict of Interest	<input type="radio"/> Special Approvals
<input type="radio"/> Small Business Solicitation Form	<input type="radio"/> Other

Done

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”

## Special Request / Non-Catalog

Attachments

Close Delete All New

File Name	Supporting Documentation Type	Document Notes	Create Date	Actions
<a href="#">Carl Zeiss Quote 123.xls</a>	<a href="#">Vendor Documents</a>	Here is a copy of the Quote from Carl Zeiss - 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.

Home | Orders | Suppliers & Catalogs | Queries & Reports | My Account | Log Off

### Special Request / Non-Catalog

Attachments

Close Delete All New

File Name	Supporting Documentation Type	Document Notes	Create Date	Actions
<a href="#">Carl Zeiss Quote 123.xls</a>	<a href="#">Vendor Documents</a>	Here is a copy of the Quote from Carl Zeiss - quote # 123	06/23/2009 07:58 AM	 
<a href="#">Sole Source Document Attachment.txt</a>	<a href="#">Sole Source Justification</a>	Attached is the Sole Source for this order -	06/23/2009 08:06 AM	 

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.



### Special Request / Non-Catalog

Requisition Header (C10) | One Time Payee (B10) | Email | Header/Lines

Save | Reset | Attachments | Preview Submit  
Review Distributions | Submit

Shopping Cart Name: UYEDA, BARBARA/2-809623

Vendor Name: CARL ZEISS INC \*Vendor Number: 006529502  
\*Dept Code: 2301 - MICROBIOLOGY \*Class of Order: R \*PAN Subject: TEST 1  
\*Dept Contact Login: MBGF0 \*Requester: GLEN FUKUI \*Requester Phone: 310-825-9108  
\*Dept Contact Phone: 310-825-9108 CC Self:  Order Date: 6/25/2009  
Base Agreement: Override Reason: TEST

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.

Line# Q 1 1 EA 6000.0 6000.0 MAT CA T M - 9.25%  
\*Description TO TEST ATTACHMENTS FOR REQS Supplier Part Number: TEST  
Promise Date: 6/25/2009  
Component of an Asset:   
Description On Check?:

Preview Submit



Close

Vendor (Vendor ID)	Base Agreement	PAN Subject	Class Of Order	Requester (Phone)	Dept. Contact Login (Phone)	FNR Code	Dept. Code	Doc To AP	Receiving	Override Reason	1099 Code	Check to Dept.
CARL ZEISS INC (006529502)		TEST 1	R	GLEN FUKUI (310-825-9108)	MBGF0 (310-825-9108)	00	2301	Invoice	Required: No Delivery: 06/25/2009 Required By: 06/25/2009	3BJ TEST		Code: Name:
<b>C10</b>	Required By 06/25/2009	Attachments	Cost not to exceed 0	Sole Source N	Previous PO	Vendor Contact		Suggested Vendor 1	Suggested Vendor 2	Suggested Vendor 3		
<b>Ship To</b>	Address		Name		Email		Phone	Fax	Mail Stop			
	230106 609 Charles E Young Drive East Molecular Science Building 1602G Los Angeles, CA 90095		FUKUI, GLEN		GLENF@MICROBIO.UCLA.EDU		310-825-9108	310-206-5231	MOLECULAR SCIENCE BUILDING			

Attachments

Name	Supporting Documentation Type	Document Notes	Create Date
Carl Zeiss Quote 123.xls	Scope of Work	vendor special quote	06/25/2009 02:43 PM
Sole Source Document Attachment.txt	Sole Source Justification	justification	06/25/2009 02:44 PM

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

### Special Request / Non-Catalog

Requisition Header (C10) | One Time Payee (B10) | Email | Header/Lines

Save | Reset | Attachments | Preview Submit  
Review Distributions | **Submit**

Shopping Cart Name: UYEDA, BARBARA/2-809623

Vendor Name: CARL ZEISS INC \*Vendor Number: 006529502  
\*Dept Code: 2301 - MICROBIOLOGY \*Class of Order: R \*PAN Subject: TEST 1  
\*Dept Contact Login: MBGF0 \*Requester: GLEN FUKUI \*Requester Phone: 310-825-9108  
\*Dept Contact Phone: 310-825-9108 CC Self:  Order Date: 6/25/2009

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



Displaying: 1-5 / 5

Line#	Qty	UOM	Unit Price	Line Amt	Actions	LineCD	State	TaxCD	Rate	Exempt
1	1	EA	6000.0	6000.00		MAT	CA	T	M - 9.25%	<input type="checkbox"/>
<b>*Description</b> TO TEST ATTACHMENTS FOR REQS					Supplier Part Number: TEST Promise Date: 6/25/2009 Component of an Asset: <input type="checkbox"/> Description On Check?: <input type="checkbox"/>					

## 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](mailto:bruinbuy@finance.ucla.edu).

# References

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