WORKFLOW GUIDE

Workflow routing is:
- A BruinBuy process
- Which was developed at the request of departments
- To allow the true end users to enter orders into the BruinBuy system
- Even though they may not be familiar with all the regulations and codes such as FAU, Object Codes, etc.

Workflow routing will introduce several new terms:
- **BORG** - BORG stands for Buying Organization and is a "unit" which is used to control privileges and roles within Workflow Routing. BORG's are typically set up following the standard organizational hierarchy and will normally be at the sub-division or department level.
- **Initiator** - An Initiator is the person who begins an order. This could be a lab manager, a Principal Investigator, or any employee to whom a department does not wish to grant full access to the BruinBuy system. Because an Initiator cannot complete and post an order, training is limited.
- **Finisher** - A Finisher is a person who is authorized to complete and post orders. This would normally be an employee who is currently processing BruinBuy orders. Each Initiator is assigned one Finisher.
- **Super Finisher** - A Super Finisher is a Finisher who has the ability to access all pending orders and to complete or reject any pending order for the BORG.
- **Purchaser** - Any BruinBuy user with authority to complete and post orders, who will not be a Finisher or a Super Finisher.
- **BORG Administrator** - An employee who will be responsible for maintaining roles for users in their BORG. Usually the department DSA will fill this role.

Currently, end users convey orders to the department administrative personnel either by oral request, email, or paper communication. Workflow Routing will allow:
- End users or *Initiators* to enter orders with only minimal training,
- By allowing *Finishers* to enter missing information, edit the request, and complete and post the order.
- *SuperFinishers* have the ability to act on all pending orders within that unit and can log onto the system and finish orders if the designated Finisher is not available.

The workflow routing process is highly automated making it easy to use.
- The system sends an email to the Finisher to let them know they have an order to finish,
- Sends an email back to the Initiator to let them know the order has been completed.
- Initiators and Finishers can also log onto the system to check the status of pending orders.
- Set up of Initiator/Finisher/SuperFinisher roles is maintained within the BruinBuy system by the designated *Central Purchasing Administrator* who has the ability to grant the roles to additional users.
The set up of workflow routing for Departments and Central Purchasing is as follows:

Department Process:
- Department Administrator will grant roles (Initiators/Finishers/Super Finishers) on the BruinBuy WorkFlow Spreadsheet
- Oasis Logon ID
- DACSS – AP730 – “zero” dollars
- Finishers must have attended full BruinBuy training
- Email address must be in Campus Directory

Central Purchasing Process:
- Review BruinBuy WorkFlow Spreadsheet Form with Department Administrator
- Validate Oasis Logon ID
- Validate DACSS AP730 access
- Validate Campus Email
- Set up Department in BruinBuy WorkFlow Borg Administration
- Assign Initiators, Finishers and Super Finishers roles
- Do “live” test to validate information
- Conduct training in Department with Initiators/Finishers/Super Finishers
- Continue to monitor Department on as needed basis
**INITIATOR PROCESS**

(Initiator is the person who begins an order and can not complete/post)

**Initiator**

Initiator must have a valid login ID and password. Currently, this means an OASIS logon. All of you are supposed to have a logon ID and have been set-up in BruinBuy, so let’s give it a try. If you don’t know your logon ID and password you will need to watch someone else process a transaction.

**Important:**

We will be in the “Live” region.
Before beginning the Shopping Cart using workflow routing, you must first select your BORG (Buying Organization).

Do you all see that you have a choice of either “BruinBuy” or your “BORG Name”? Since you are using workflow routing you will always select your department BORG.

This is important because all activity and records are stored in the BORG in which they were processed and your workflow details are set-up only in the BORG and not in the “BruinBuy”. If you try to process in “BruinBuy” you will run into difficulty and may not be able to complete or find your orders.

Select your BORG.
**Initiator**

Those of you currently using BruinBuy know about profile and defaults. These are also important for Initiators. It is essential that the Initiator’s Profile and User Defaults are completed before the first requisition is created. If they have not been set-up, then please do the following:

1. Click on Profile/Ship To
Initiator

It is important that the fields in the “Profile / Ship To” be filled in completely like the example given below.

1. Phone Number - enter area code and separate with dashes.
2. Fax Number - enter area code and separate with dashes.
3. Dept. Code/Name – enter 4 digit department code and name of department.
4. Email Address – verify email address. If incorrect, user must request his/her department administrator to update the email address in the Campus directory. This field can not be edited from the Profile / Ship To screen.
5. Click on binocular icon to select the default Ship To Address.
**Initiator**

After clicking on binocular icon, a new window will appear. Please see example below.

1. Type the 4 digit department code in “Search Ship To” box. If you are an Initiator and don’t know what Dept Code is, please check with one of the “finishers”.
2. Click Search.
3. A list of all addresses for that specific department will appear and you will be able to see the addresses. If you don’t see the one you are looking for, use the arrows to go to the next page(s) to see additional addresses.

4. Click on “Check Mark” icon to select desired address. If the desired address can not be found on the list, or if additional addresses are necessary, then you can submit a request to BruinBuy Ship to Request/Change located under “My Account”. The address will be added to the list and it will probably take about two (2) days to be added. You cannot simply type in and enter the address. If you use multiple “Ship To” addresses you will want to make sure they are all set-up so that you won’t have problems once you start processing orders.
Initiator

5. Once you click on check mark, previous screen will appear with selected address
6. Click Save.
The next step is to set up your Default Values. Click on “Default Values”.

Add the following:
1. Dept Code
2. Class of Order – N
3. PAN Subject - You can either leave it blank on default screen or complete it on each order or you can fill in “standard wording” on the default screen.
   Important: If you don’t fill in the PAN Subject box on the default screen the box will appear as “blank” and you may be asked to complete it for each item. If you complete it for each item, it may result in splitting your order into multiple po’s. We recommend that you enter a default PAN Subject. If you want to change the PAN Subject box for each new order, we recommend that you do so by going into the default screen before beginning your order and changing it there, rather than changing it as you process order items.
4. Requestor and Requestor Phone number (fill in now or fill in on the purchase order)
5. Dept Contact Login ID and Dept Contact Phone – This should be the logon ID of the Finisher assigned to that particular Initiator. This is important because any error messages, H&I notification sent by the system will go to this person. The Dept Contact Phone can be either the Initiator’s or the Finisher’s.
Initiator

6. Receiving Required?(fill in only if required by dept, otherwise leave blank)
7. DocToAP – “I” Invoice
8. Override Reason (fill in w/ appropriate dept override reason)
9. Line Code – MAT
10. Desc On Chk? (leave blank)
11. CC Self (click on box)
12. State Code – CA
13. Tax Rate – M 9.25%
14. Exempt Reason (leave blank)
15. Tax Code – T (Taxable)
16. FAU (fill in w/ favorite FAU or leave blank) – Initiators may not know the FAU information. If not, they can leave it blank but must communicate in comments which “FAU” to charge. They may refer to it as “Dr. X’s Public Health Grant, etc.” Next, we’ll talk about how to set-up FAU Favorites.
17. Click Save.
**Initiator**

A FAU Favorites list can be created if desired. Click on Favorite FAUs and do the following:
1. You can enter up to 40 FAUs in any desired manner (i.e. with or without Sub, with or without Object Code, etc.). So, if you purchase using multiple subs, you may want to leave that field blank and enter it for individual orders. We recommend that Initiators work with their Finishers to make sure that all required fields are set-up correctly.
2. Click Save.
**Initiator**

After Initiator’s Profile / Ship To and Default Values are completed the Initiator is ready to create a Shopping Cart / Order.

1. Click on Catalog Orders.
Initiator

You may search the catalog by Keyword, Manufacturer, Supplier, or Part Number (Hint: the fastest way to find an item in the catalog is by using the Part Number field). The part number can be either the manufacturer part # or the supplier catalog number. If you don’t know the part #, use the other selection criteria to drill down to the item.

1. Type in part number and then click Find.

2. You have the option to click on the Item Description field for a more detailed, long description of the item with a picture (if provided by supplier). See screen shot on next page.
**Initiator**

Here is an example of a detailed, long description of the item and a picture. Important: To return to the previous screen to continue your Shopping Cart, click the Close button. Never click the “Back” button in the Toolbar! It may take you out of BruinBuy.
**Initiator**

1. Type quantity desired and click on (shopping cart) to add this item. If the quantity you are ordering is “1”, you can simply click the shopping cart.

If desired, a Favorite Items list can be created for frequently ordered items by clicking (Favorite items). If you want to add to your Favorites, you must do it now while you are creating the Shopping Cart.
Initiator

After adding the first item, the Line Details screen will appear. The information which appears is based on your Profile / Ship To and Default Values. The screen should look like the example below.
1. If you are an Initiator you may leave any of these fields blank, although we recommend you complete as much as possible to make sure your order is processed correctly and without delay. If you are a Finisher, you must ensure that all fields are completed before submitting the order. Your department may have specific instructions for Initiators and you should follow those instructions. If they require fields to be completed, you should complete them.
2. FAU information must be complete and include the Object Code. At this time the FAU Favorite list can be pulled up, if desired. Click on binocular icon.
3. PAN Subject – type in a subject matter regarding this order.
4. If doing a multiple line order for only one vendor, mark the bubbles that reads, “Display this section only when sub object changes” and “Display this section only when the vendor changes”. Marking these bubbles will help prevent the order from splitting unnecessarily.
5. If Initiator would like to add additional email recipients to this order, Initiator should click on the Email field at the top before closing this screen. When this screen is completed, click Update.
6. The screen below allows you to add recipients and comments.
7. Click on add to search email recipients.
**Initiator**

7. Type in last name, first name (as pictured). Only names currently in the Campus Directory are available.
8. Click Search.
**Initiator**

9. Click the “Check Mark” icon to select email reviewer. The selected person will receive an email for this order only, and not for all future orders.
10. A maximum of six (6) email reviewers can be added.
11. Type any necessary comments in the Comments Field. These comments will be seen by all reviewers, as well as the newly added email recipient(s).
12. Click on Update.
After you update the Email screen, you will return to the Line Details screen.
1. PAN Subject must be in.
2. Click Save/Close.
Initiator

Initiator can continue their order by adding more items, if desired.
1. Type in the part number or other selection criteria for the next item.
2. Click Find. New item should appear, enter the quantity desired.
3. Click “add” icon to add it to the Shopping Cart.
4. Click on Shopping Cart when all items have been ordered.
**Initiator**

At Shopping Cart, you can review the list of items you have added. You can make any changes to the order at this time (i.e. add new items, delete unwanted items, change Ship To address, change FAU, etc.). Click on the appropriate Actions icons to make the desired changes, if necessary.

1. **Shopping Cart Name** – type in the subject matter of the Shopping Cart.
2. **Click blue diskette** to save the Shopping Cart Name.
3. **Click Justification** – type in justification for the Finisher.
**Initiator**

You may type in a business justification of the order for the Finisher to read.
1. Type in justification.
2. Click Save.
To see the process of order approval for his/her Borg (Buying Organization), the Initiator can do the following:

1. Click Approval Preview.

The Approval Preview screen allows the Initiator to see the name of the Finisher in the Borg who will be receiving the order to approve it.

1. Click Close.
Initiator

The Shopping Cart is now ready for review and/or approval by the Finisher.
1. Click Submit.
Initiator

A message will appear on the Initiator’s screen if the Shopping Cart is submitted successfully (See below)
**Initiator**

After submitting Shopping Cart, the Initiator will receive an email from BruinBuy Workflow. If Initiator needs to notify others in the lab, this email can be forwarded by the Initiator. Remember, this email is notification that the purchase request was sent to the Finisher. Any follow up must be done with the Finisher. (See below)

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**Email:**

From: m-bruinbuy@ucla.edu
To: Ruth, Inc.
Cc: 
Subject: BruinBuy Workflow

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Your Shopping Cart has been submitted to the workflow process:

**Shopping Cart Date:** Testing Email Confirmation
**Organization Name:** 209990-FIRE/HAZARD
**Shopping Cart Completion Date:** September 10, 2009 14:51 PM PST
**Initiator:** RUTHI, JOE
**Finisher:** COOKE, RUTH

**Group:** 1

**Vendor Nbr:** 194912888
**Vendor Name:** OFFICEMAX
**Requester Name:** RASERA A UTEDAO
**Dept Contact:** MMES2
**Dept Contact Nbr:** 310-794-6013
**Doc. To Ap:** 1
**Receipt Auth:** H
**Req/Po/Order Date:** 09/10/2009
**Deliver To:** RUTHI, JOE
**Ship To:**
10500 WILSHIRE BLVD
WILSHIRE CENTER BLDG
SUIT 560 - BAR RA AA
LOS ANGELES, CA 90024
**F.O.B.:** 00
**Ship Via:**
**Terms:**
**Override Reason:** FUNDS IN CORRECT SUB

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"SPIRIT - PREMIUM INSERTABLE INDEX TAB DIVIDERS - WHITE, 11" X 8-1/2" 5-TAB, CLEAR"

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Note: If Initiator wants to cc: lab people on a real order, he/she has to add them before Shopping Cart is submitted to Finisher for approval.
**Initiator and Finisher**

After the Initiator has submitted a Shopping Cart, the Finisher receives an email notification to notify him/her that a Shopping Cart has been placed in his/her BruinBuy WorkFlow inbox to be reviewed. (See below)
Initiator and Finisher

After Shopping Cart has been approved or rejected by Finisher, the Initiator receives an email notification from BruinBuy Workflow. (See below)

Note: Initiator will receive a PAN email Notification when Shopping Cart was approved only. (See below)
**Initiator**

After the purchase order has been created the Initiator can check the status of his/her orders processed by the Finisher under “BruinBuy Order” to see all orders. BruinBuy Orders show catalog orders only, Special Request orders can be seen by selecting “All Orders”. All BruinBuy WorkFlow and BruinBuy orders (catalogs, Special Requests) can be viewed at “All Orders”.

Click on BruinBuy Orders.
**Initiator**

The Initiator can see that the Shopping Cart order was approved by the Finisher and was sent to the supplier (See Status).

The Initiator can also view the items that were on the Shopping Cart order.

1. Click on the small yellow arrow to the left of the Order Number. It will change to a green arrow and will display all the items on the order.
FINISHER PROCESS

(Finisher is a person who is authorized to complete/post orders)

Finisher

After Initiator submits the order, the system sends an email to the Finisher to let him/her know he/she has an order to finish. (See below)
Finisher

Once you click on the link or type www.bruinbuy.ucla.edu the system will take you to Bruinbuy.

1. Log In
2. Select your BORG (Buying Organization).
**Finisher**

Any Shopping Carts waiting for approval will appear in the Workflow Approve / Review list. Finisher can review the order from this screen and approve or reject it by clicking the appropriate buttons. Any comments the Finisher would like to send to the Initiator can be entered in the Comments field. The Finisher can also review the Shopping Cart in detail and make any necessary changes to the order by doing the following:

1. **Click on Workflow Approve / Review**
Finisher

Once you click on Workflow Approve / Review, list of pending orders will appear.

Before you start the process of approving an order you have to be familiar with the following icons (See below).

View Approval Map icon

Finisher can see who it was the Initiator who submitted the order prior approval. (See below)
Edit Shopping Cart icon

Once Finisher clicks on this icon, Shopping Cart will be displayed and it can be edited. (See below)

Shopping Cart History icon

Finisher can see the history of the process of a shopping cart. (See below)
Finisher can print a copy of the Shopping Cart prior approval by clicking on this icon. (See below)
Finisher

Now that the Finisher is familiar with those icons, is ready to start the process to approve an order.

To view information from an order click on the square box to select it, then click on Edit icon 📝.
**Finisher**

Here is the example of the screen the Finisher will see after clicking the Edit icon. The Finisher can review the details of the order by clicking on any of the Actions icons.

Remember the Finisher must complete all the necessary fields before submitting the Shopping Cart. Failure to properly complete all fields will cause an error at time of submit.

![Image of Finisher screen](image)

Once the Shopping Cart is approved by the Finisher the message below will appear.

![Image of Approval message](image)
By email the Initiator will receive the message below.

If Initiator & Finisher CC: themselves will receive a PAN Email Notification (see below)
Super Finisher Process

(Finisher who has the ability to access all pending orders to complete/reject)

Super Finisher

If the Finisher is out of the office the Super Finisher can approve/delete/reject a Shopping Cart.
Type [www.bruinbuy.ucla.edu](http://www.bruinbuy.ucla.edu) the system will take you to Bruinbuy.

1. Log In
Super Finisher

2. Select your BORG (Buying Organization).

3. Click on Workflow Approve / Review
Super Finisher

A Super Finisher can access any pending Shopping Carts in the BORG. They can do this in several ways. If they know who the Finisher is they can simply select the Finisher name from the drop down box on the right side of the screen and any pending Shopping Carts for that Finisher will appear.
Super Finisher

If one of the Finishers is on vacation or out of the office, the Super Finisher will have to access the Finisher’s Approval List in order to review Shopping Carts from the Initiator. The Super Finisher follows the same review process as the Finisher. Although a Super Finisher can finish any pending orders in their BORG at any time, we strongly recommend that they do so only in cases where the assigned Finisher is not available to complete the order. We also recommend that a Super Finisher communicates with the Finisher about any orders completed.
Super Finisher

Once you click on Workflow Approve / Review, list of pending Shopping Carts will appear. Initiators assigned to you and to the Finisher will appear. To view information from an order click on the square box to select it, then click on Edit icon.

Here is the example of the screen the Super Finisher will see after clicking the Edit icon. The Super Finisher can review the details of the order by clicking on any of the Actions (List, Print, Delete, Edit) icons.
**Super Finisher**

Once the Shopping Cart is approved by the Super Finisher the message below will appear.

By email the Initiator will receive the message below.
Finisher receives PAN Email Notification.

```
From:   PAN - BARBARA UYEDA (POST2MVS.ASG.UCLA.EDU)
To:     Dickey, Ruth; Huyhn, Joe; Gamez, Ruth
Cc:     
Subject: TEST

******************************************************************************
**FUND OVERRIDE REASON: FUNDS IN CORRECT SUB**
******************************************************************************
LOC ACCOUNT CC FUND PROJECT SUB OBJECT SOURCE AMOUNT TRANS DT
  4   062859 29900 01 4700  2.37  04/30/00

ORDER TOTAL:  2.37

PAC ORDER NBR........: 3275 F KB301 00
ORDER DATE..........: 04/30/00
VENDOR NBR..........: 104052 888
AGREEMENT NBR.......: 000050000400
VENDOR NAME/ADDRESS: OFFICEnAX INC
                     (BUYNBUY VENDOR ONLY)
                     13131 WESTERN AVE
                     GARDEN GROVE, CA 92641

REQUESTOR NAME......: BARBARA UYEDA
DEPT CONTACT/NAME...: HRREG / GOMEZ, RUTH
DEPT CONTACT NBR....: 310-794-6813
DOC. TO AP..........: I
EQ SCREENING........: 
RECEIPT AUTH.......: N
BUYNBUY TRANC TO...: 10408758
```
**Super Finisher/Finisher**

This is an example of the Initiator’s BruinBuy orders list. It lists all of the orders that the Initiator has created. Super Finishers and Finishers may require PO numbers for documentation and tracking. This example allows the Super Finisher and Finisher to see all orders they posted for their Initiators.

You have successfully completed the BruinBuy WorkFlow training for Initiators/Finishers/Super Finishers. Thank you for taking time to review your role in this process. Initiators need to work closely with their Finishers. Finishers can email bruinbuy@finance.ucla.edu or call 310-794-6013 with questions.