



ASCEND 2.0

01/11/2024

AGENDA

- BruinBuy *Plus* Launch
- Contract and Grant Expenditure Type List

BRUINBUY *PLUS* LAUNCH

UCLA Research
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BRUINBUY *PLUS* R1 LAUNCH



*UCLA's new procure-to-pay system,
BruinBuy Plus, successfully launched
on January 2, 2024!*

To prepare for success in the new system, we will review the following topics:

1. New invoice submission process
2. Change order limitations on migrated Purchase Orders

NEW INVOICE SUBMISSION PROCESS

New invoice submission process:

- Transcepta and the invoice submission portal have been decommissioned
- Vendors must email invoices to noreply@invoices.ucla.edu
- For more information, visit the [BruinBuy Plus hub](#)

Outgoing subaward Invoices:

- All subaward invoices submitted to noreply@invoices.ucla.edu will need to be approved by the PI and Fund Manager in BruinBuy *Plus*, even if the invoice is already signed by the PI
- If departments receive invoices directly from subawardees, submit invoices immediately upon receipt (without PI signature); then, complete approvals in BruinBuy *Plus*

CHANGE ORDERS ON MIGRATED PURCHASE ORDERS

Policy for Change Orders on Migrated POs:

- Change orders cannot be made to Purchase Orders that have been migrated from BruinBuy to BruinBuy *Plus*
- A new PO must be requested, and the old PO must be closed out

Impact on Research:

- Procedure applies to any modifications to POs, including outgoing subawards (e.g., NCE)
- Departments must request creation of new POs in a timely fashion to allow OCGA sufficient time to execute modifications to subawards
- Delay in request of PO can cause delay in execution of modification to subawards

BRUINBUY PLUS ACCESS & TRAINING



Who has access?

- All PIs with outgoing subawards have been granted access to BruinBuy Plus
- Fund Managers are provided access to the system upon completion of required training



Training

If access is needed for Fund Managers to assist PI's with review of subaward invoices:

1. Access the [Fund Manager BruinBuy Plus course page](#) on Bruin Learn and log in via SSO
2. Click **Begin Course Now** and navigate through the training materials
3. Complete the final assessment to receive credit
Course length is approximately 30 min

CONTRACT & GRANT EXPENDITURE TYPES

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EXPENDITURE TYPES

Background:

- Expenditure Type represents the classification of the expense and is the “E” in the POETAF chart string
- Will be used to charge contract and grant expenses in PPM and will roll up to the Account segment in the CoA
- Initial list of [Expenditure Types](#) was shared at the [April 2023 RAF](#)
- Thank you to those who shared input – the updated Expenditure Types list reflects your feedback

Additional Review Conducted

- Incorporated CoA Account values into analysis to confirm Expenditure Types are not less granular than the CoA → added additional Expenditure Types for these cases
- Some boundary systems (ex. BAR) cannot accommodate POETAF → updates made to align the Expenditure Type list with the CoA Account values as needed

EXPENDITURE TYPES

Request for Additional Feedback:

- Your feedback is requested on the updated Expenditure Type list!
 - List will be shared following RAF meeting via the ORA News mailing list
 - Email kcadle@research.ucla.edu with any feedback by end of day **Wednesday, January 24th**

Expenditure Types:
Inventorial Equipment for Project - Other Equipment
Inventorial Equipment for Project - Scientific Medical
Inventorial Equipment for Project - Scientific Non-Med
Inventorial Equipment for Project - Telecom/Networking
Inventorial Equipment for Project - Vehicles
IRB Fees
IV Solutions
Lab/Shop Glass/Plastic/Ceramics
Lab/Shop Instruments And Supplies
Lab/Specialized Equipment < \$200
Laboratory - Gases-Compressed
Laboratory - Gases-Cryogenic
Laboratory - Precious Metals
Laboratory - Specimens
Laboratory Animals & Supplies (Purchase)
Laboratory Testing Services - External
Laboratory Testing Services (Recharge)

CONTACT INFORMATION

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ASCEND 2.0 RESEARCH WEBSITE

<https://ascend.ucla.edu/research/overview>