



ASCEND 2.0

02/08/2024

AGENDA

- BruinBuy *Plus* Update
- Preview: Subaward/Subcontract Tips & Resources Guide

BRUINBUY *PLUS* UPDATE

UCLA Research
Administration

UPDATE: WORKFLOW FIX FOR SUBAWARD/ SUBCONTRACT INVOICES

During the first few weeks of hypercare, the Procurement team identified an issue with workflow for invoices against subawards/subcontracts.

Known Issue: Due to a system glitch, invoices against subawards/subcontracts were not prompting notification emails to PIs and fund managers to alert them that an invoice was ready to approve

Identified Resolution:

- As of 1/19/24, the workflow issue has been fixed. Invoices ready for PI and fund manager approval will now prompt notification emails
- For invoices submitted to noreply@invoices.ucla.edu prior to 1/19/24: The PI and fund manager tied to the invoice do not need to take immediate action; however, in some cases, Accounts Payable team may reach out directly to the PI and/or fund manager for manual approval
- For invoices submitted to noreply@invoices.ucla.edu on or after 1/19/24: Workflow routes invoice for approval as designed

REQUESTING PI & FUND MANAGER SYSTEM ACCESS

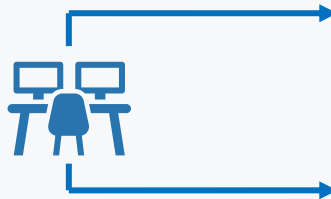
The process outlined below explains how PIs and fund managers gain BruinBuy Plus system access.



An admin (likely the fund manager) navigates to the “Research Subaward” or “Research Subcontract” form in BruinBuy Plus



Within the form, the admin inputs the name and email of the fund manager and PI associated with the subaward or subcontract



The form routes to PSG (Procurement Solutions Group), who checks whether the fund manager and PI are in the system and hold the correct role

If the fund manager and/or PI listed in the form **already has the correct role in BruinBuy Plus**, the central team simply adds them to the workflow to review invoices specific to that subaward/ subcontract

If the fund manager and/or PI listed in the form **does not already have the correct role in BruinBuy Plus**, the central team provides them access to relevant training and to BruinBuy Plus, and adds them to the right workflow in the system

UPDATING A PI OR FUND MANAGER FOR SUBCONTRACT/SUBAWARD INVOICE APPROVAL

- For an **Invoice** that is currently in workflow with the **incorrect PI/fund manager**, please email help@it.ucla.edu and indicate with whom to **replace** the current **PI/fund manager**
- The most effective way to **update PI/fund manager information** is when creating an **amendment** to a **Subaward/Subcontract**, to update the fields asking, “Who are the UCLA PI/fund manager?”
- For R1 (through December 2024), PIs and fund managers will be maintained by the **Procurement Solutions Group (PSG)**. The original list (reflected in workflow for existing Subcontracts/Subawards) was developed utilizing data from **PATS** – with validation in some cases from departments.

NEED HELP? CONTACT THE BRUINBUY *PLUS* HELP DESK

BruinBuy *Plus* users who require assistance are encouraged to contact the help desk.



PHONE

Call **310-267-4357** and a service ticket will be created on their behalf.



EMAIL

Email questions directly to help@it.ucla.edu and a ticket will be auto-created.



SERVICENOW

Log a ticket yourself in [Service Now](#) and ITS will route it accordingly.

NEED HELP? JOIN RESEARCH-SPECIFIC OFFICE HOURS

To ensure the Research community gets clear, timely answers to questions related to UCLA's new procurement processes, the BruinBuy *Plus* team is facilitating office hours featuring a Research-specific breakout session at the following dates/times:



- Tuesday, February 13, 11:00-12:00 p.m. PST – [register here](#)
- Tuesday, February 20, 11:00-12:00 p.m. PST – [register here](#)

NEW! Submit questions in advance via the survey below:

[SURVEY LINK](#)

NOTE: There is only one survey link for all Office Hours sessions.

SUBAWARD/SUBCONTRACT TIPS & RESOURCES GUIDE

The BruinBuy *Plus* and Ascend 2.0 Training Team collaboratively developed the [Subaward/Subcontract Tips & Resources Guide](#), a helpful resource addressing many common questions and issues raised by UCLA's Research community. The guide includes information about the following:

- User Access
- Invoices
- Notifications
- Approvals
- How to see migrated POs
- How to create a new PO for a migrated PO for which we cannot do a change order
- F&A Rates
- When to do Receiving
- How to create amendments against a BruinBuy *Plus*-originated Subaward/Subcontract
- How to reach out for help
- How to update a fund manager for Subaward/Subcontract invoice approval

Visit the [BruinBuy *Plus* hub](#) to access other helpful BruinBuy *Plus* resources

PREVIEW: SUBAWARD/SUBCONTRACT TIPS & RESOURCES GUIDE

UCLA Research
Administration

Subaward/Subcontract Tips and Resources Guide


Invoices

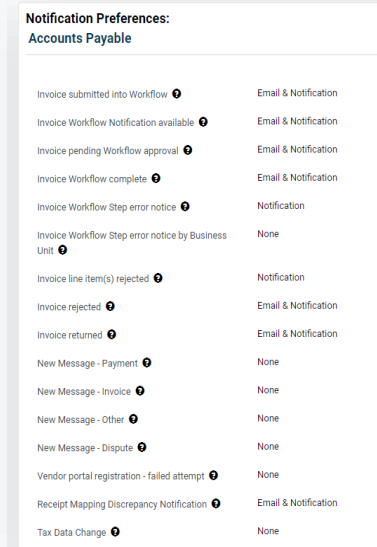
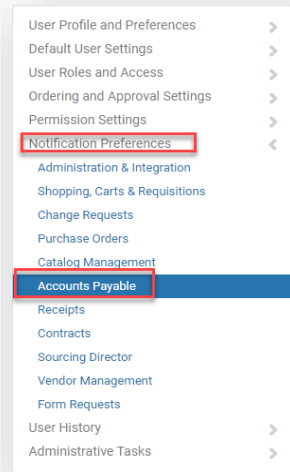
- All **Invoices** need to be sent to noreply@invoices.ucla.edu for the **Invoice** to get into BruinBuy *Plus* and start workflow.
- All **Invoices** against a **Subaward/Subcontract** will require a Fund Manager **AND** a PI to approve the **Invoice**.
- All **Invoices** against a **Subaward/Subcontract** require **Receiving**.
- Notifications can be sent to alert you to the following actions:
 - An **Invoice** against a **PO** you are the **PO Owner** on has entered BruinBuy *Plus* (at this point you can view it by accessing your **PO** and locating the **Related Documents**, and accessing the **Invoice**).
 - An **Invoice** is in **Workflow** and now requires **Receiving**.
 - An **Invoice** is in a **Workflow Step** that requires your **Approval**.
 - An **Invoice** or **Credit Memo** has successfully completed all workflow review processes and has sent to **PAC** for payment
- It is preferred for the **Subrecipient** to email the invoice to noreply@invoices.ucla.edu



Subaward/Subcontract Tips and Resources Guide

Notifications (1 of 5)

- Notifications can be changed within your **User Profile**.
- To review notifications, navigate to the top right of your home screen in BruinBuy *Plus*, and select the **Silhouette Icon** to access your unique **User Profile**. 
- On the left side menu, select **Notification Preferences**, then **Accounts Payable**.
- This will direct you to the notifications or **Accounts Payable**.
- You will notice which notifications you currently have enabled and what type of notification is being sent.

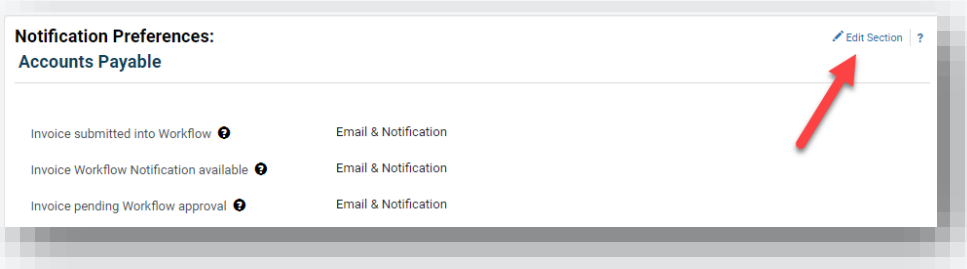




Notification Preferences: Accounts Payable	
Invoice submitted into Workflow	Email & Notification
Invoice Workflow Notification available	Email & Notification
Invoice pending Workflow approval	Email & Notification
Invoice Workflow complete	Email & Notification
Invoice Workflow Step error notice	Notification
Invoice Workflow Step error notice by Business Unit	None
Invoice line item(s) rejected	Notification
Invoice rejected	Email & Notification
Invoice returned	Email & Notification
New Message - Payment	None
New Message - Invoice	None
New Message - Other	None
New Message - Dispute	None
Vendor portal registration - failed attempt	None
Receipt Mapping Discrepancy Notification	Email & Notification
Tax Data Change	None

Subaward/Subcontract Tips and Resources Guide

Notifications (2 of 5)

- To update **Notification Preferences**, navigate to the top right of the **Notification Preferences: Accounts Payable** screen and select **Edit Section**.



- Once you select **Edit Section**, you will notice **Blue Radio Buttons** and options for you to select.
- To turn **On** a notification
 - Select the **Override Button**
 - Then select the notification type you wish to receive.
 - None – no notifications
 - Email – Only an email notification
 - Notification – This is a notification within BruinBuy *Plus* that will appear with the **Bell Icon** next to your **Profile Icon**  
 - Email and Notification – This will send both an email and a notification in BruinBuy *Plus*.

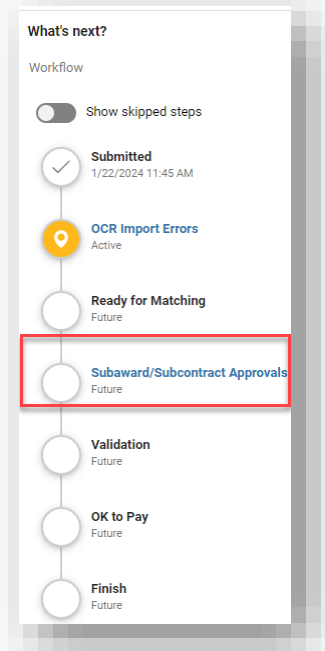
Subaward/Subcontract Tips and Resources Guide

Notifications (3 of 5)

When will you receive a notification?

- If you created a **Requisition/PO**, a notification can be sent to you when **Receiving** needs to be completed.
- When the invoice is in the **Subaward/Subcontract Approvals** workflow step.

NOTE: There may be other workflow approval steps before an invoice gets to this step, so it could take time to get to your workflow approval step.

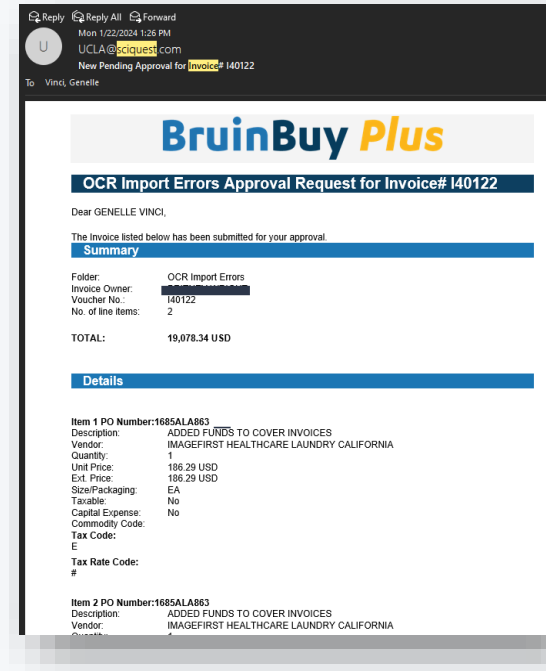


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Notifications (4 of 5)

You have the ability to approve invoices from the notification itself **OR** from within BruinBuy *Plus*.

Email notifications (Pictured to the right) contain useful information such as the workflow step, the PO Number, and line item details.



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Notifications (5 of 5)

Scrolling down the body of the email will reveal a section to Take Action.

From here, if you select the yellow **Take Action** button, it will direct you to a new page giving you the options to **Approve**, **Reject/Cancel**, or **Assign to Myself**.

Ready to approve, reject or assign this document to yourself? [Take Action](#)

Bruin Plus

Invoices: I40122

Owner:	BRITNEY WRIGHT
Subtotal:	19,078.34 USD
Terms Discount:	0.00 USD
Discount:	0.00 USD
Tax1:	0.00 USD
Tax2:	0.00 USD
Shipping:	0.00 USD
Handling:	0.00 USD
No. of line items:	2
Vendors:	IMAGEFIRST HEALTHCARE LAUNDRY CALIFORNIA
Assigned To:	Not Assigned

> **Addresses**

Attachments 1

> **Line Items**

> **Other Approvers** 10

Actions

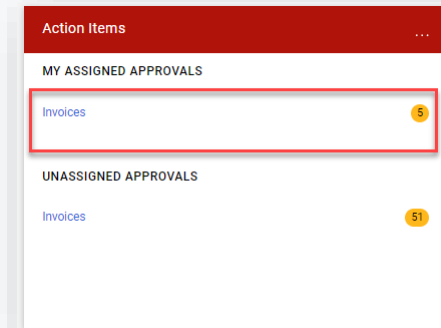
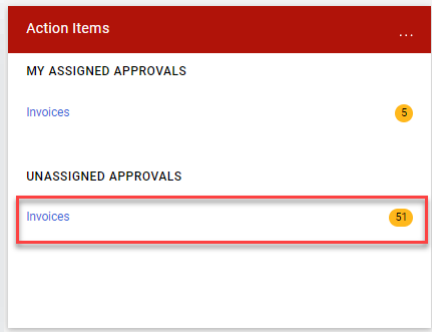
Comment

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Approvals (1 of 3)

- As mentioned in the [Notifications Section](#), you can **Approve** directly from the notification, or you can **Approve** from within BruinBuy *Plus*.
- After Logging into BruinBuy *Plus*, under the **Home Shopping Dashboard** there is a widget called **Action Items**.
 - Here you will notice your **Unassigned Approvals**
 - Then you can select **Invoices**

NOTE: You can also access **Invoices** you have already assigned to yourself in the **My Assigned Approvals** section.



Subaward/Subcontract Tips and Resources Guide

Approvals (2 of 3)

Once you select **Invoices**, you can review the **Invoices** you need to approve by **Fund**.



Subaward/Subcontract Tips and Resources Guide

Approvals (3 of 3)

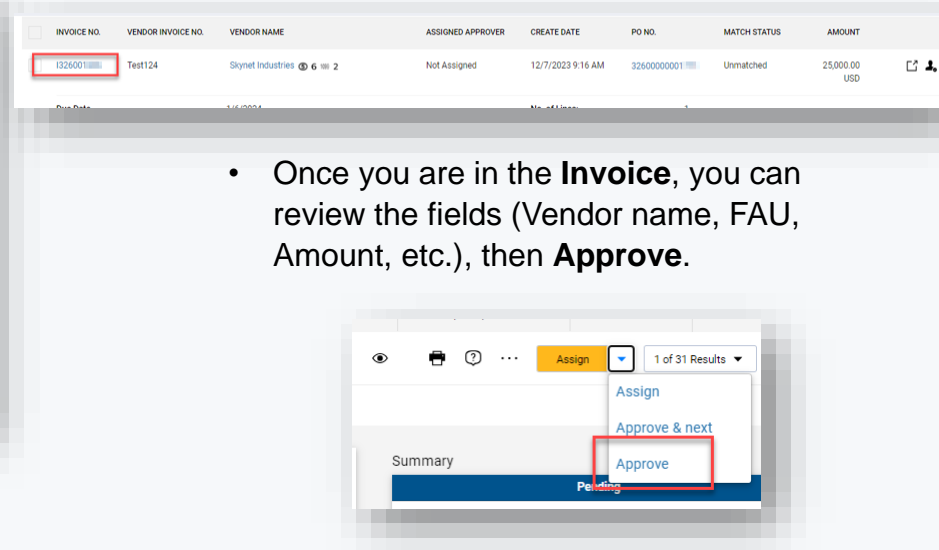
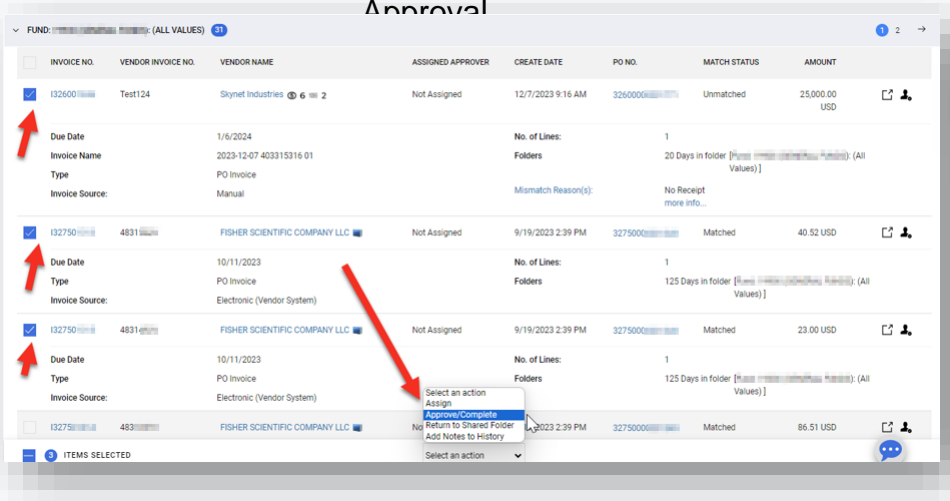
You can select a folder and review approvals two ways:

Mass Approval

Approval One-by-One

- Select the **Invoice Number** to open it.

- Once you are in the **Invoice**, you can review the fields (Vendor name, FAU, Amount, etc.), then **Approve**.



CONTACT INFORMATION

GENELLE VINCI

gvinci@finance.ucla.edu

ASCEND 2.0 RESEARCH WEBSITE

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