

July 2023 Research Administration Forum Q&A

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Campus Purchasing

Q1: Can you give us a rough estimate of when we'll be moving to this new subaward invoicing system? More generally, will all these Ascend 2.0 changes go live at once, or will different features be available at different times?

A1: The R1 (BruinBuy Plus project) will go live Fall 2023. The R2 project (Oracle) will go live end of 2024/early 2025.

Q2: Is the email address for incoming invoices for UCLA Staff only? Or will Subawardees be instructed to submit their invoices via the email address?

A2: The new AP email address that will be used for all invoice submissions will be announced closer to the go-live, but can be used by anyone who needs to submit a valid invoice. However, all Vendors (payees) will be instructed as to where to send their invoices, which will be the new AP email address.

Q3: Does the system have the option to add a "cc" person in the PI's department when the emails to them go out? (e.g. when the PI is a Chair and their Executive Assistant is the one who needs to know that there's something awaiting signature, it would be great if we could have the email go to both the PI and their assistant, even if it's just the PI who will have ability to sign)

A3: There is no option to "cc," however, this can be resolved through Outlook rules, if you want emails to be forwarded.

Q4: If the PI has a lab supervisor to review the invoices, can they have access to BruinBuy Plus?

A4: A communication just got sent out to all CAO's/CFO's to define the right individuals to be the "fund managers." I would connect with your CAO/CFO to ensure the correct individuals are being added.

Q5: Is there a "time limit" for the review and approval process prior to the payment being issued?

A5: The approvals have to happen prior to AP being allowed to pay the invoices.

Q6: Sorry, I didn't follow your answer to my question about whether the mechanism for foreign subawards would be the same as what you are describing for domestics. I thought you said the mechanism for foreign subs would be unchanged, but it would just be brought into the new Bruin Buy mechanism, but I don't know what that means.

A6: The "processes" are not changing, the way in which you complete the process is changing. I don't know enough about how foreign subs are processed.

Q7: Fund managers usually do not know if the invoices/services being charged have been performed unless the PI approves it then that is when the fund manager sends it to AP.

A7: This can be communicated through the exercise happening with the CAO's/CFO's right now. I would connect with your CAO/CFO and communicate who the right individual(s) would be.

Q8: Thought the whole practice of Oracle product is to replace the existing system which is running on this PAC system. So even after Ascend 2.0 is up and running, PAC is the backbone for everything?

A8: Oracle will be replacing PAC. For R1 (BruinBuy Plus), PAC is the "backbone." For R2, Oracle will replace PAC, PAC will be sunset.

Q9: How come OCGA data never includes the actual title of the award/project? Is it because of proprietary information concerns? PI's often complain that they don't know what the cryptic "award name" means/indicates ("what project is this?"), so I was just curious as to the reasoning behind this trend.

A9: The snapshot includes the project title in section 1.

Extramural Fund Management

Q1: PI should be one important parameter when searching Awards. Is that correct?

A1: Yes, Principal Investigator is a search field on the Award page and is also a column within the search results grid. The screenshot on slide 13 within the EFM presentation shows a mock-up of where this field is located.

Q2: Who are the users for this Oracle PPM system? Is this departmental? ORA? Is this replacing the ORA Portal?

A2: Project Portfolio Management (PPM) is a subledger within Oracle Financials Cloud. Oracle Financials Cloud will replace our current mainframe financial system and modernize and streamline financial management at UCLA. The PPM subledger will be used for the financial management of Contract and Grant (C&G) awards and users will include Departmental and Central office staff. More information regarding Oracle Financials Cloud can be found on the [Ascend Website](#).

Q3: For projects, will there be a consistent naming mechanism used across all awards so that fund managers know that the starting initials could mean cost-sharing, program income (i.e. CS12345, PI22334)?

A3: The naming convention for projects will start with A and then be a seven-digit sequential number. Each project will have Project Type associated which will provide this level of detail. Users can easily view the Project Type within Oracle and various reports to identify the purpose of the project.

Q4: Will there be central, ORA-created POETAF (and/or CoA and payroll ledger) reporting tools to provide monthly financial reports to PIs?

A4: The Ascend project will deliver a set of reporting capabilities to the user community as part of the implementation of the new financial system. These capabilities are expected to include canned/standard reports, the ability to build new reports, the ability to build new ad-hoc queries, and the ability to consume financial system data from system to system. More information regarding reporting can be found on the [Ascend Website](#). Additionally, a Campus Reporting Workgroup and a Research Reporting Subcommittee have been established to develop reports needed by campus. The

Research Reporting Subcommittee is comprised of members from various campus departments with large research portfolios and are including PI reports in their list of reports to develop for go-live.

Q5: Would it show the sub award info Amount and entities like we see on the snapshot?

A5: The Award header in Oracle will indicate if an award is expected to have subawards. Detailed information for each subaward will be available in new reports we are creating. These reports are expected to provide detailed information regarding each subaward in a user-friendly format.

Q6: Will the ORACLE PPM system you showed be the new way for us to get all the details we currently access through OASIS?

A6: Oracle Financials Cloud will replace our current mainframe financial system. Project Portfolio Management (PPM) is a subledger within Oracle Financials Cloud and will be used for the financial management of Contract and Grant (C&G) awards. Details that currently exist in OASIS will be converted to Oracle Financials Cloud, and for C&G to the PPM subledger as needed to maintain robust financial management. Non-Financial Management for C&G awards will continue to take place in outside systems and the Award Snapshot will continue to be available on the ORA Portal. More information regarding Oracle Financials Cloud can be found on the [Ascend Website](#).

Q7: Will there be a process for sister-UC campus subaward invoices to be reviewed/approved before payment under the new system? Right now, they are paid without anyone at the dept level approving them.

A7: Intercampus Reimbursement Requests (IRR) from sister campuses will continue to be routed to EFM directly during the Release 1 phase of BruinBuy + due to the nature of payment of these invoices. Design sessions are starting soon with both the Grant Team and the Procure To Pay Team to establish business processes for IRRs which will take effect with the go-live of Ascend. We will discuss within the Project team opportunities for enhancement prior to the go-live of Ascend and report back at a future RAF.

Q8: It would be more user-friendly (less cryptic) to put the actual payment basis name instead of the 1/2/3 code. Is it not possible to do the former instead of the latter? Note that, with BB/Ascend, I understand we're going in the opposite direction: Moving away from cryptic codes, and using descriptive fields instead. If there's not enough room to put the entire name, what about abbreviations, e.g.: CR, FFP, and FFR. That would be more understandable than 1, 2, 3.

A8: The reason a single digit code is used to represent the Multiple Payment Basis is to allow easy entry, maintenance, and extraction for reporting. This is in alignment with the use of several other fields within the Account and Fund tables which use codes to denote values.