AGENDA

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

SERVICE NOW
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.
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
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
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.
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.
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.
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.
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**.
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.
Once you select **Invoices**, you can review the **Invoices** you need to approve by **Fund**.
You can select a folder and review approvals two ways:

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

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

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ASCEND 2.0 RESEARCH WEBSITE
https://ascend.ucla.edu/research/overview