

POWERPOINT LINKS – CLASS 4: POST-AWARD TOOLS

Slide 2: Ascend 2.0 Disclaimer

Ascend 2.0: <https://ascend.ucla.edu/>

Slide 3: Types of Logins - Access Matrix

1. Access Matrix:

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/DOMORA_Manual_Access-Matrix_0.pdf

2. UCLA Logon: <https://accounts.iam.ucla.edu/#/>

3. DUO as secondary authentication: <https://ociso.ucla.edu/iamucla/mfa-at-ucla/activate-ucla-logon-mfa>

Slide 9: UCLA Financial Web Reports

1. Business & Finance Solutions' Home Page: <https://www.finance.ucla.edu/>

2. Direct link: <https://fswj.it.ucla.edu/menu/faces/main.xhtml>

3. What do I use it for? <https://ofsr.it.ucla.edu/FSReports/desc.asp>

4. NPEAR: <https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/NPEARs.pdf>

5. TOFs: https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/DOMORA_Manual_Post-Award_TOFs.pdf

6. Recharges: <https://www.finance.ucla.edu/sales-and-services-and-recharge-training>

7. Create new UCPath Project codes: <https://fsw.ais.ucla.edu/ProjectCode>

Slide 11: Layout & Navigation for Financial System Reports

EFM Resource Slide Deck:

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/DOMORA_Resources_OFSR-Overview-By-EFM.pdf

Slide 13: Layout & Navigation for Financial System Reports, page 3

Gifts Received Undistributed (GRU):

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/DOMORA_Manual_Post-Award_Gifts-Received-Undistributed.pdf

Slide 14: Layout & Navigation for Financial System Reports, page 4

Overhead base: <https://www.finance.ucla.edu/corporate-accounting/base-object-code-table-for-indirect-costs>

Slide 15: Financial System Key Entry

1. Non-Payroll Expenditure Adjustment (NPEAR):

<https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/NPEARs.pdf>

2. Transfer of Funds (TOF):

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/DOMORA_Manual_Post-Award_TOFs.pdf

3. Recharge system one-time training: <https://www.finance.ucla.edu/sales-and-services-and-recharge-training>

Slide 16: Applications

1. BruinBuy Plus "PAN":

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/DOMORA_Manual_Post-Award_BruinBuy-Plus-PAN-Review.pdf

2. BruinBuy Plus: <https://bruinbuyplus.ucla.edu/>

Slide 20: OASIS

1. Status of fund # or FAUs:

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/_DOMORA_Manual_Post-Award_YN-Fund.pdf

2. BruinBuy (Legacy): <https://bruinbuy.it.ucla.edu/>
3. BruinBuy Plus: <https://bruinbuyplus.ucla.edu/>
4. UCPath: <https://ucpath.universityofcalifornia.edu/home>

Slide 24: ORA Online Resource Center (ORA Portal)

1. Add'l Access Form:
<https://portal.research.ucla.edu/Reports/StaticPortalDocument?docType=PortalToolAccessRequest>
2. Web link: <https://portal.research.ucla.edu/>

Slide 26: ORA Online Resource Center (ORA Portal), page 3

1. Cayuse: <https://ocga.research.ucla.edu/s2s-grants/>
2. Exception: <https://powerforms.docusign.net/ad1c2311-9072-4b5d-9907-8c33e2fd2758?env=na3&acct=8161a94f-714d-401f-889c-c97cede23c31&accountId=8161a94f-714d-401f-889c-c97cede23c31>

Slide 27: ORA Online Resource Center (ORA Portal), page 4

1. PAMS: <https://pams.research.ucla.edu/>
2. Effort Reporting System (ERS): <https://ers.it.ucla.edu/>

Slide 30: PI Portal

1. PI must grant access to the Fund Manager:
https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/_DOMORA_Resources_PI-Portal-FM-Access.pdf
2. PI Portal: <https://piportal.research.ucla.edu>

Slide 37: PAMS:

1. New User Form: <https://efm.research.ucla.edu/wp-content/uploads/pams-new-user-request-form.pdf>
2. EFM's website: <https://efm.research.ucla.edu/pams-overview/>
3. ORA Portal – Post-Award tab: <https://portal.research.ucla.edu/PostAward>
4. Direct link: <https://pams.research.ucla.edu/>
5. EFM Training Material: <https://efm.research.ucla.edu/fund-management-training-resources/#pams>
6. Smart Closeout Tool: <https://efm.research.ucla.edu/closeout-resources/>

Slide 40: DocumentDirect

1. UCLA Central Resource Unit Website under Other Web Applications: <https://cru.ucla.edu/quick-access-links>
2. UCLA Financial Web reports under Application - Web Document Direct:
<https://fsw.ais.ucla.edu/DDISelect/DdiRptSelect.aspx>

Slide 43: BruinBuy Plus

1. BruinBuy+ training: <https://purchasing.ucla.edu/bruinbuy-plus-hub>
2. Purchasing & Accounts Payable Home Page: <https://purchasing.ucla.edu/>
3. Direct link: <https://bruinbuyplus.ucla.edu/>
4. Subaward requisitions:
https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/_DOMORA_Manual_Post-Award_Subaward-BruinBuy-Requisition.pdf
5. BruinBuy Legacy (now only view only): <http://www.bruinbuy.ucla.edu/>

Slide 46: UCPath

1. UCPath Training: <https://cru.ucla.edu/ucpath-access-requirements>
2. Central Resource Unit Home Page: <https://cru.ucla.edu/>
3. UCPath Login: <http://ucpath.universityofcalifornia.edu>
4. General Ledger Tasks: https://ucpath-ifp.universityofcalifornia.edu/psc/ucphrprd/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TEMPLATE_ID%3aPTPPNAVCOL&scname=ADMN_UC_GL_TASKS_LOC_NAVCOLL&PanelCollapsible=Y&PTPB_GROUPLET_ID=UC_GL_TASKS_LOC_TILE_FL&CRefName=UC_GL_TASKS_LOC_TILE_FL&AJAXTRANSFER=Y

Slide 50: ERS

1. EFM's Website: <https://efm.research.ucla.edu/ers-overview/>
2. ORA Portal – Post-Award tab: <https://portal.research.ucla.edu/PostAward>
3. Direct link: <https://ers.it.ucla.edu/EffortReporting/enterERS.do>
4. EFM offers ERS Class: <https://lms.ucla.edu>

Slide 54: SOM Financial Projection Module (FPM)

1. Deans Office DSA: <mailto:DeansOfficeDSA@mednet.ucla.edu>
2. Dean's Office Application Dashboard icon: <https://uclahs.box.com/s/kv7qygfs17kx339e24vnc0qm016aaiyo>

Slide 56: School of Medicine QDB

Jump Server Excel...Instructions: <https://uclahs.box.com/s/kv7qygfs17kx339e24vnc0qm016aaiyo>

Slide 59: SOM Financial Reporting Application

Monthly Overdraft Report:

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/DOMORA_Manual_Post-Award_Overdraft-Reports.pdf

Slide 62: DG Inform

1. Deans Office DSA: <mailto:DeansOfficeDSA@mednet.ucla.edu>
2. Web-based training: <https://uclahs.app.box.com/s/3dyi2dv5x7p1rz4rboquomvfipzmukse>
3. Dean's Office Financial Affairs Home Page: <https://medschool.ucla.edu/departments/administrative/financial-affairs>
4. Direct link: <https://powerbi.mednet.ucla.edu/pbireports/browse/>

Slide 65: OnCore (aka ResearchConnect)

1. CRIS Help Desk: <mailto:crishelpdesk@mednet.ucla.edu>
2. Online required training: https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/DOMORA_Manual_CT_OnCore-Access-Roles-Job-Duties-Trainings.pdf
3. OnCore web portal: <https://crmsprod.mednet.ucla.edu/forte-platform-web/login>

Slide 67: Homework for Next Week's FPM/QDB Class/Lab

Jump server installation instructions: <https://uclahs.app.box.com/s/kv7qygfs17kx339e24vnc0qm016aaiyo>

Slide 68: Links from Today's Class:

1. UCLA Financial Web Reports: <https://fswj.it.ucla.edu/menu/faces/main.xhtml>
2. ORA Online Resource Portal (ORA Portal): <https://portal.research.ucla.edu/>
3. PI Portal: <https://piportal.research.ucla.edu>
4. PAMS: <https://pams.research.ucla.edu/>
5. BruinBuy Plus: <https://bruinbuyplus.ucla.edu/>

6. UCPATH: <http://ucpath.universityofcalifornia.edu>
7. ERS: <https://ers.it.ucla.edu/EffortReporting/enterERS.do>
8. DG Inform: <https://powerbi.mednet.ucla.edu/pbireports/browse/>
9. OnCore: <https://www.researchgo.ucla.edu/oncore>

28: Google Survey Link

Anonymous Google Survey Link: <http://goo.gl/forms/C3gdjsL5y1>