



Ascend

UCLA

Ascend Town Hall for Research Admin Forum

November 8th, 2018

Agenda



1. Why Ascend?
2. What's Ascend?
3. What's Changing?
4. How will I stay informed?
5. Next Steps
6. Q&A

Ascend Launch Video

"The needs of our campus are constantly evolving and we need a scalable system that will grow with us and elevate our financial foundation as UCLA begins its second century."

Gene D. Block
Chancellor



▶ | 🔊 2:01 / 2:30

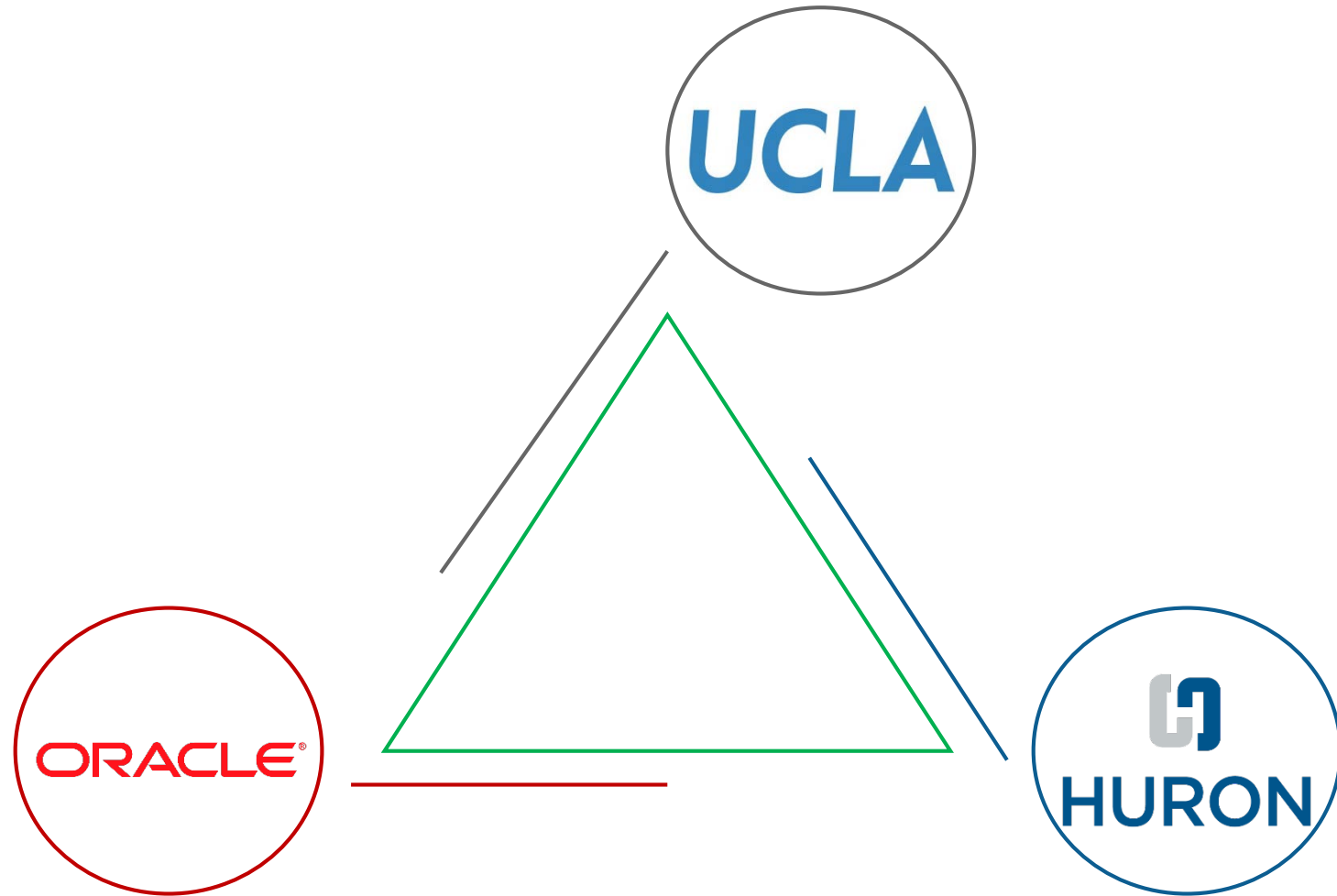




Ascend

UCLA

For UCLA,
By UCLA

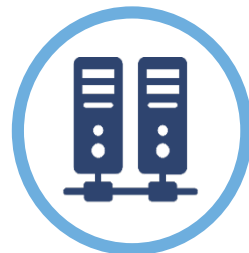


WHY ASCEND?

Ascend



Current Financial System vs. Needs



Mainframe Technology

- Maintenance
- Limited improvements
- Long-term stability

1980s

Operating Budget	\$849M
Grants & Contracts Revenue	\$119M
Medical Center Revenue	\$169M
FTEs	17.6K



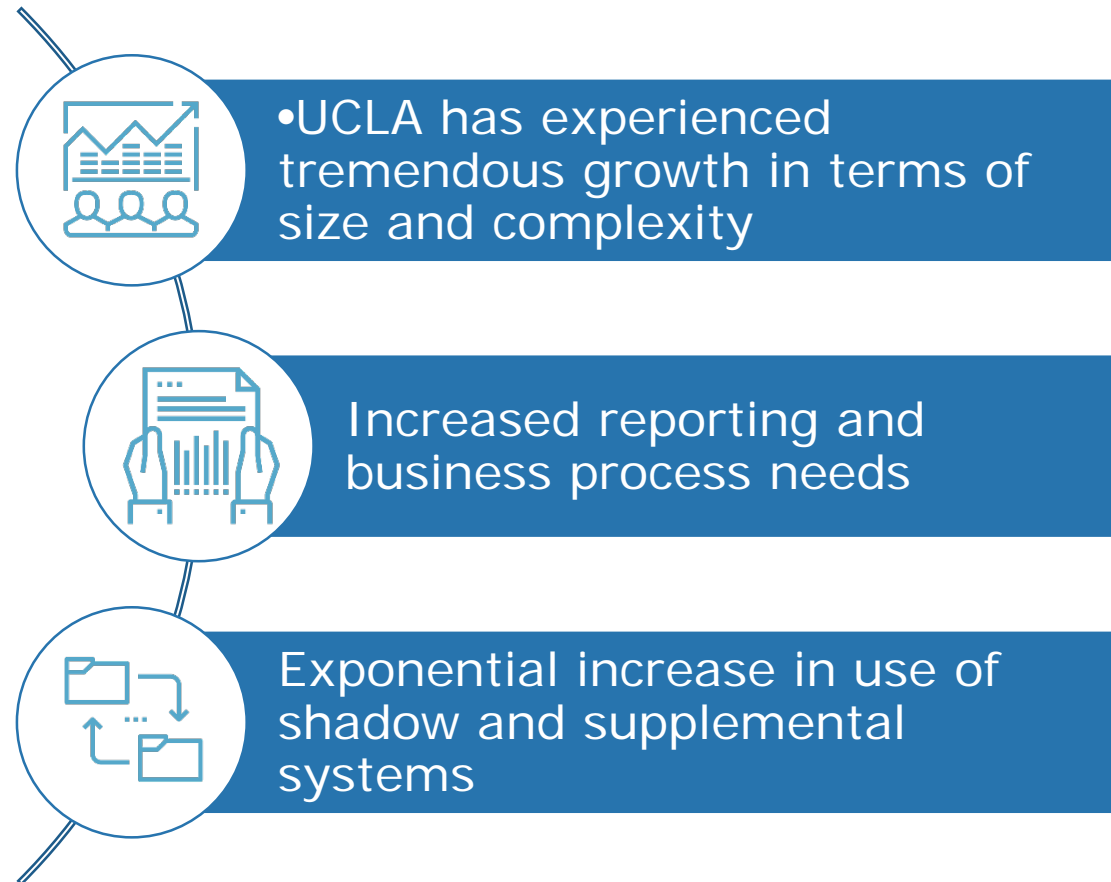
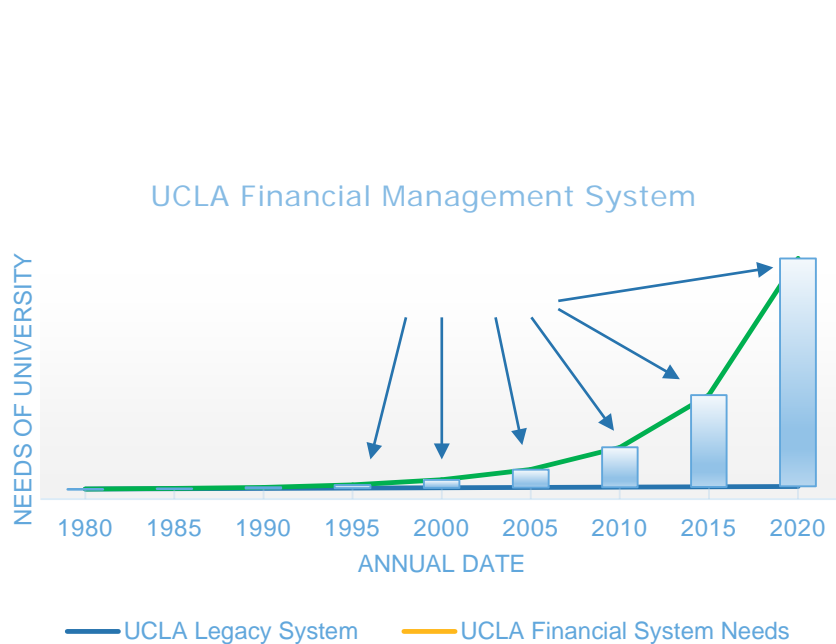
Current Needs

- Modern day efficiencies
- Streamlined reporting needs
- Compliance/regulatory changes
- Mobile technology

Today

	\$7.5B
	\$948M
	\$2.4B
	34.5K

UCLA's Use of Shadow Systems



UCLA's Core Financial System Today

Processing transactions shouldn't be this difficult!

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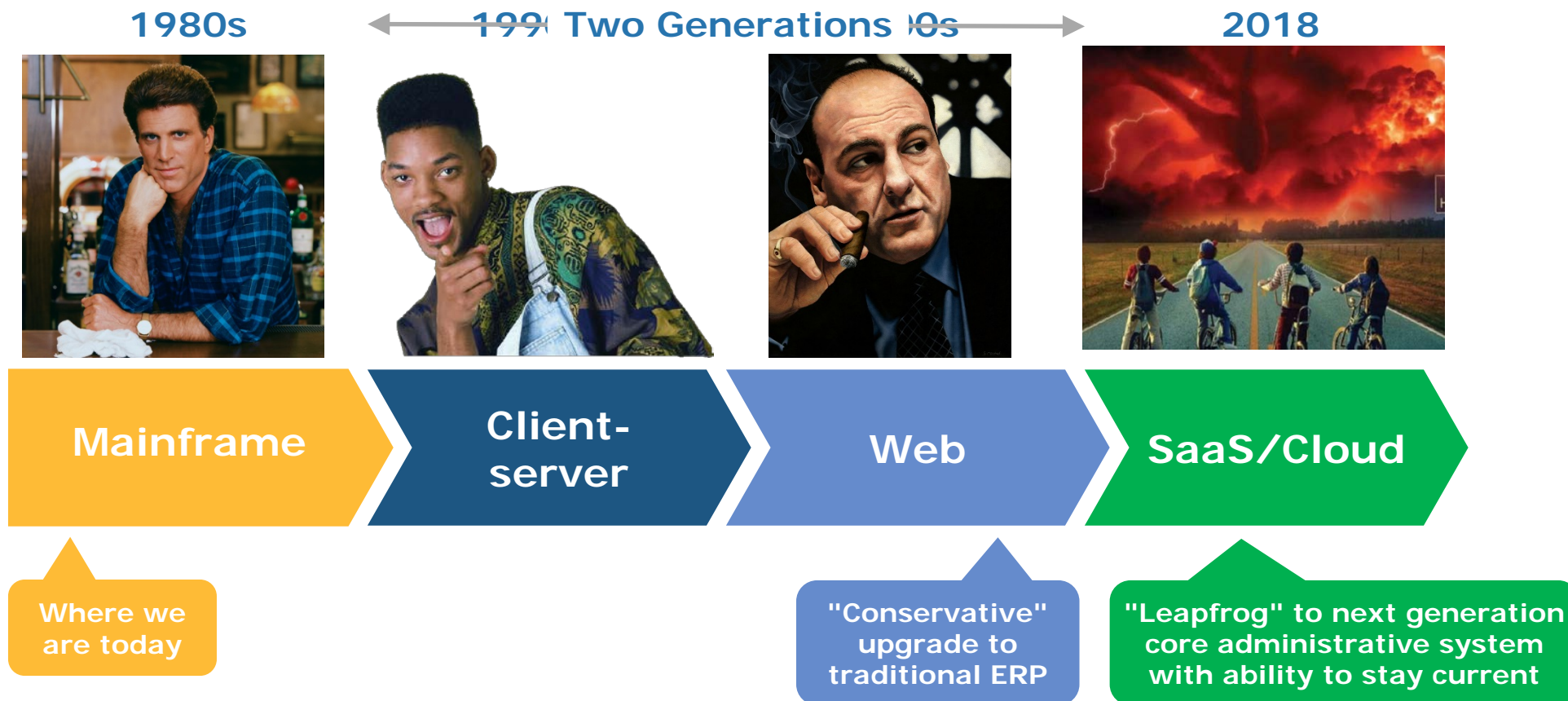
UCLA-AIS                *** ACCOUNT/CC TABLE ***                FSM0672

ACTION:  B      TABLE:  AC  +                                LAST UPDATE: 06/07/01
LOC:    4  ACCOUNT/CC: 100000  _                            LAST LOGON :
-----
ACCOUNT/CC TITLE: BALANCE SHEET ACCOUNT DEFAULT
DEPARTMENT: 9930   CONTROL-GENERAL ACCOUNTING
FUNCTION:   95    BALANCE SHEET
PROGRAM:    _
MANAGING INVESTIGATOR: _____ +
ARC: _____ UAS/DISCIPLINE: _____ CAPITALIZATION: _ SAU: _
NSF CODE:   _ +
REF/SRC SUB LEDGER: _ DO NOT HISTORY: _ MOVE FUND CONTENTS TO SOURCE: _
UCPATH REFERENCE IND: _ (P=PAYCHECK E=EMPL ID N=NONE)
PLANT ASSET: _ RECHARGE ALLOW IND: _

UCOP ACCT'T GROUP: 100100 + CA-CASH
UCOP CCA: _____ +
ACCOUNT/CC CLOSED?: _ CLOSED DATE: _____ LOGON ID: _____
UCPATH ACCOUNT TYPE: _ (L=LIABILITY FOR UCPATH)

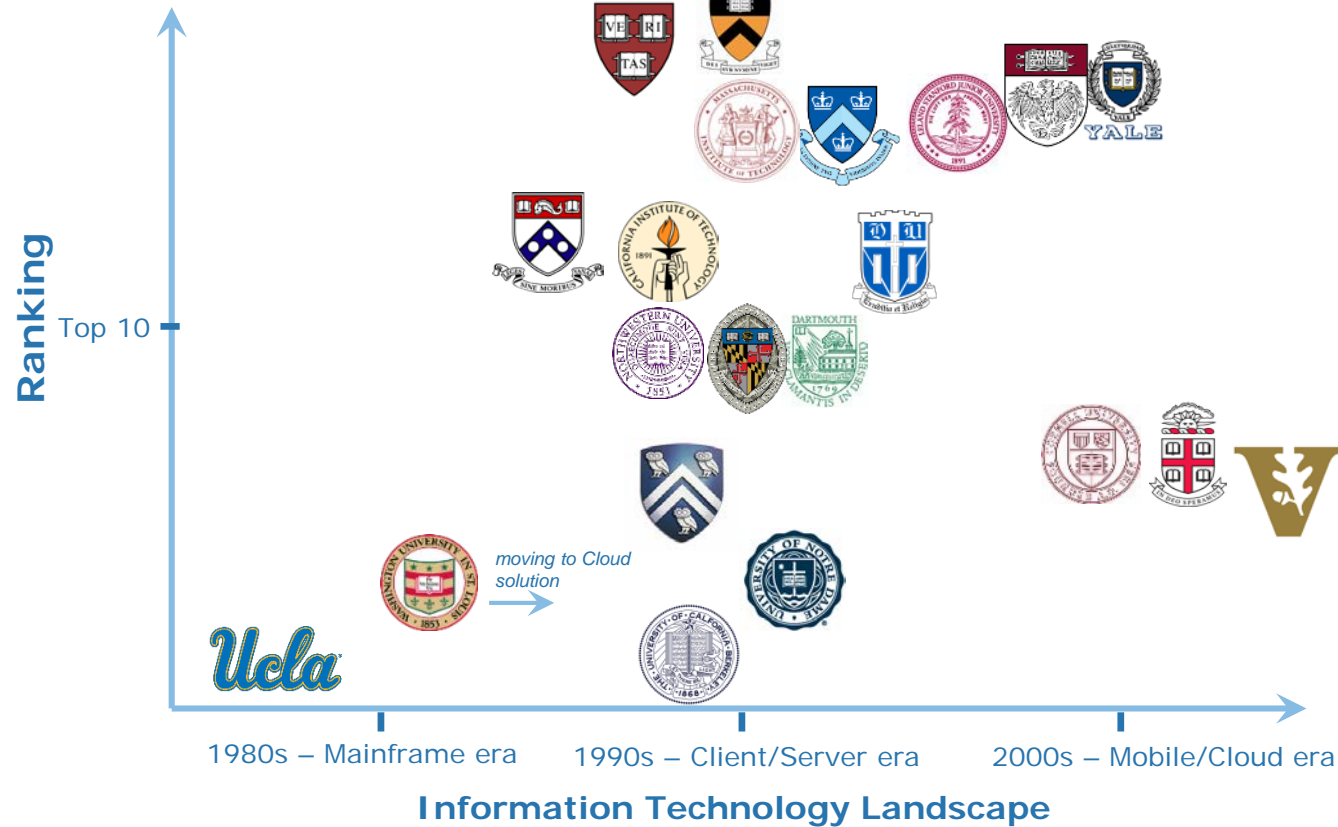
MESSAGES:  FIRST ENTRY ON TABLE GIVEN
           PRESS ENTER, PF8, OR PF20 FOR NEXT ON FILE
    
```

Opportunity to Leapfrog Technology



Administrative Systems Landscape

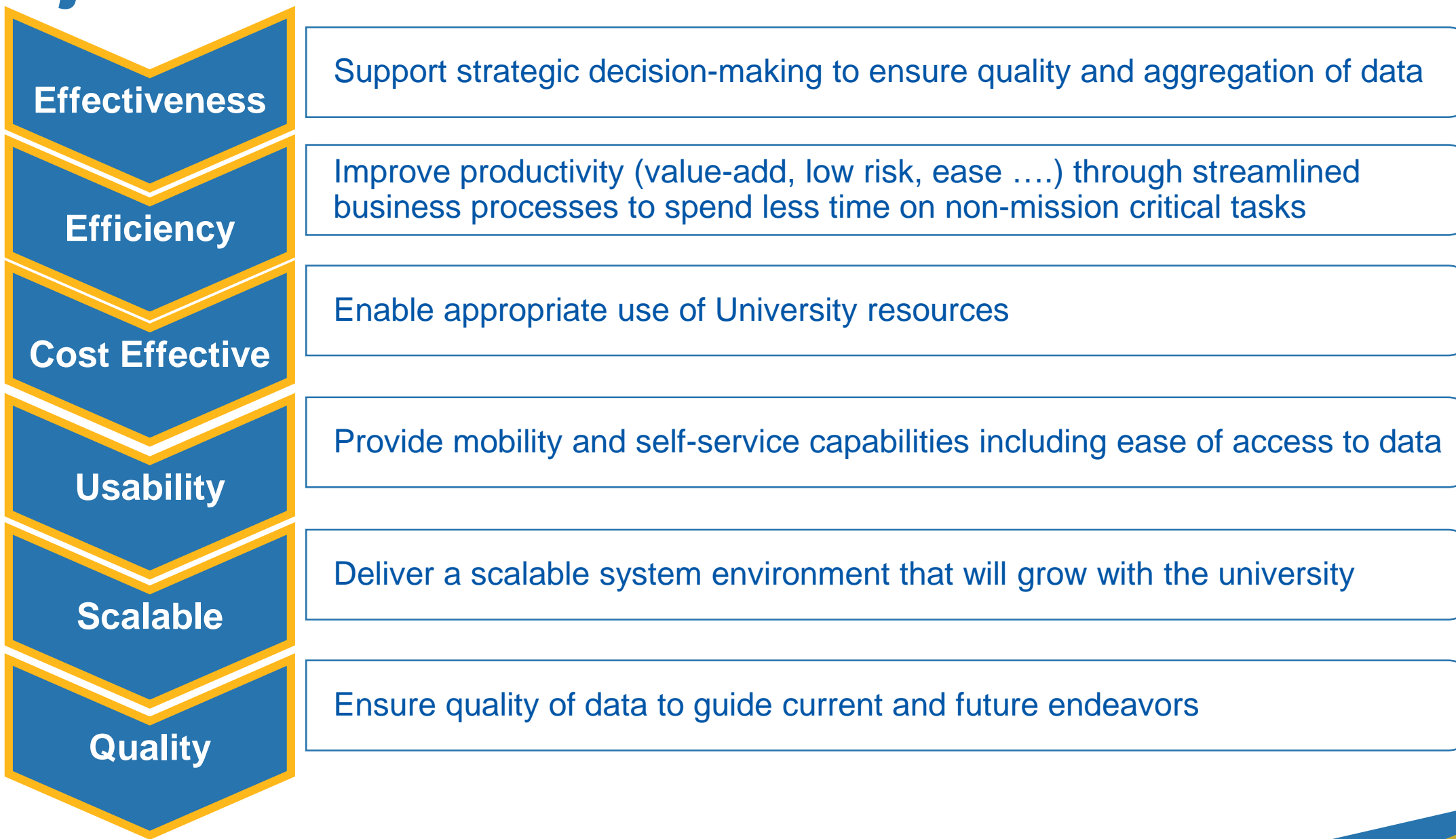
Ranking vs. Information technology landscape



- | Ranking | |
|---------|----------------------------|
| | Princeton University |
| | Harvard University |
| | Yale University |
| | Columbia University |
| | Stanford University |
| | University of Chicago |
| | MIT |
| | Duke University |
| | University of Pennsylvania |
| | Cal Tech |
| | Johns Hopkins University |
| | Dartmouth University |
| | Northwestern University |
| | Brown University |
| | Cornell University |
| | Vanderbilt University |
| | Washington U |
| | Rice University |
| | University of Notre Dame |
| | UC, Berkeley |
| | UCLA UC, Los Angeles |

Source: 2018 US News National Universities Rankings

Project Goals

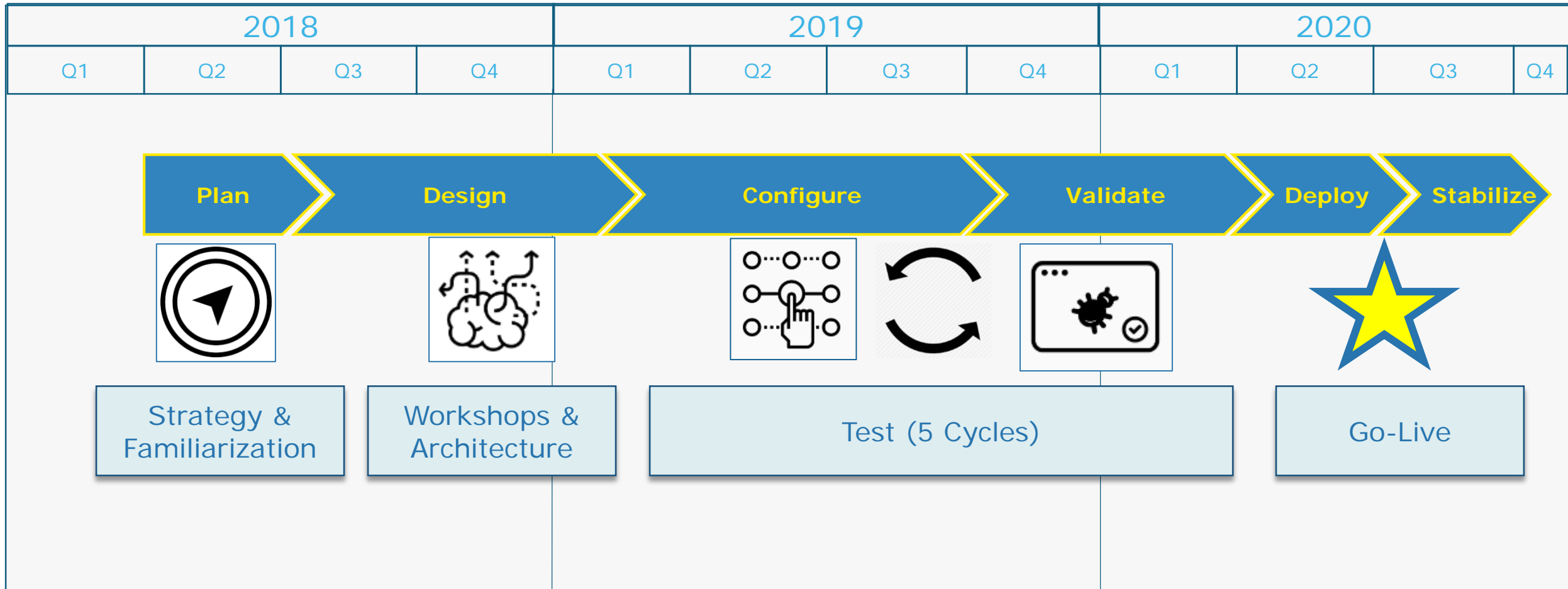


WHAT'S ASCEND?

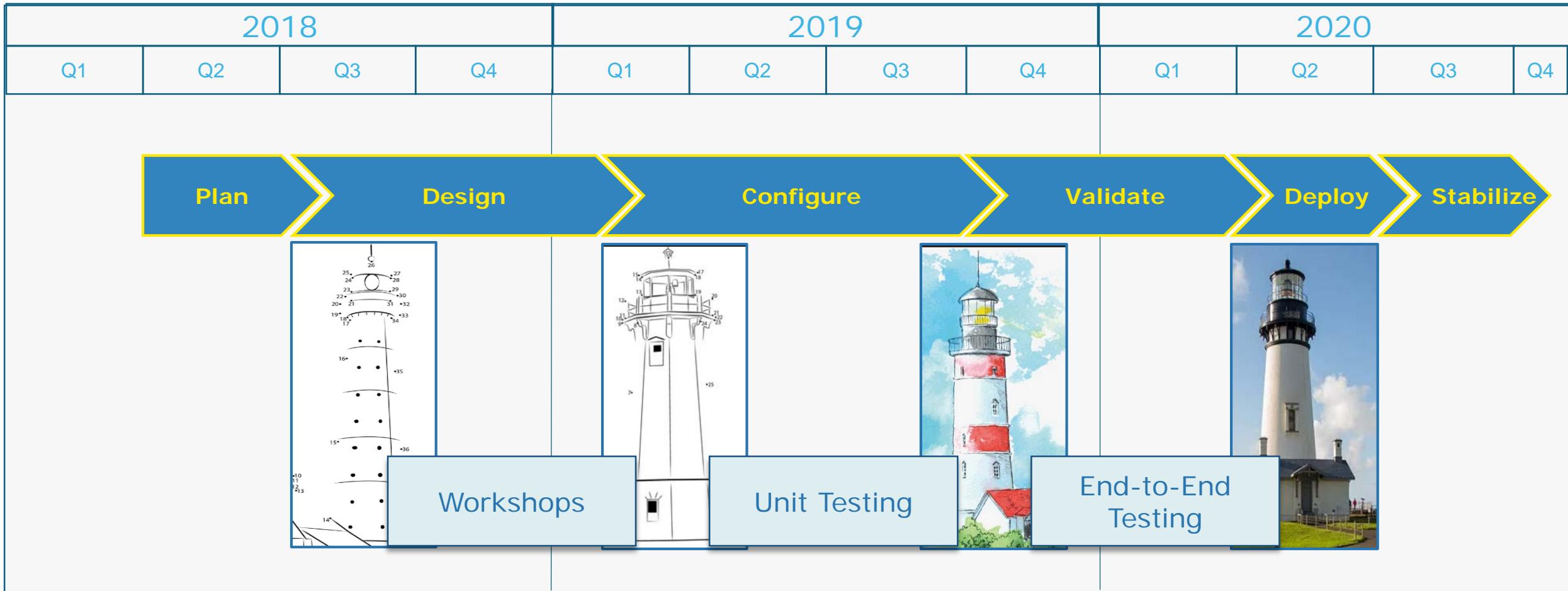
Ascend



Project Timeline



Iterative Nature of Cloud Projects



Project Governance Membership

Executive Committee

Michael Beck
(Administration)

Gregg Goldman
(Finance)

Rhea Turtletaub
(Ext. Affairs/Foundation)

Roger Wakimoto
(Research)

Scott Waugh
(Provost)

John C. Mazziotta
(Health Sciences)

Susan Cochran
(Academic Senate)

Ex Officio Members

Steering
Committee

Ryan McDaniel
(Huron)

Jeff Henley, Steve Miranda, Gene Casciola
(Oracle)

Steering Committee

Allison Baird-James
(Finance)

Omar Noorzai
(BTO)

Jeff Roth
(Planning & Budget)

Julie Sina
(External Affairs)

Marcia Smith
(Research)

Ex Officio Members

Frank Wada
(Registrar)

Ed Pierce
(Audit & Advisory)

Kamyar Zaré
Program Director

Ryan McDaniel
Huron Exec. Sponsor

Gita Agrellas
Mike Gillett
Margaret Berry
Oracle

Mike Van Norman
(UCLA ITS)

Jason Schober
Project Director

Vivek Cherian
Project Manager

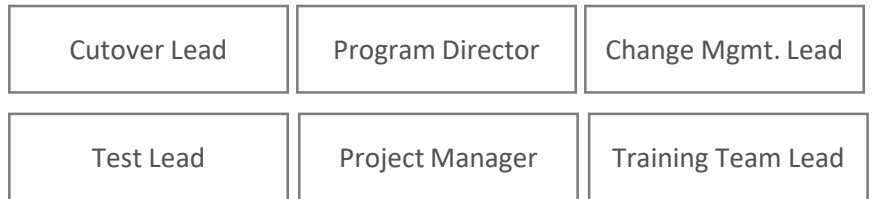
UCLA Ascend Project – Organization Structure

Executive Committee

Steering Committee

Core Team

Project Office



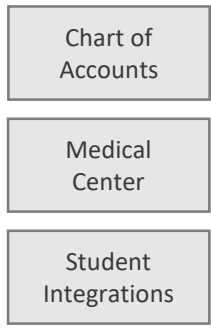
Change Teams



Change Populations



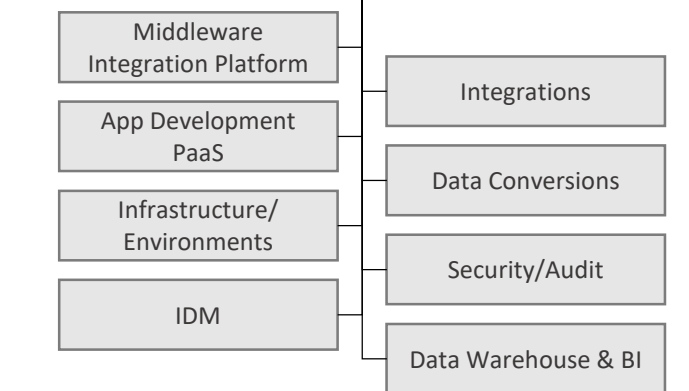
Cross-Functional Workgroups



Functional Workstream



Technical Workstream



Cloud Transformation Methodology



"How do we make this work for you?"

Build

Requirements Driven

- Assumed Customization
- Scope Creep

Solution Driven

- Drives Improvement
- Quicker delivery to the user

Buy

"What do you want?"



WHAT'S CHANGING?

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Ascend Cloud

Business Intelligence
Reporting & Data

General Ledger
Accounts Receivable
Fixed Assets
Cash Management

Finance

Procure-to-Pay

Sourcing
Purchasing
Procurement Contracts
Supplier Portal

Accounts Payable
Invoice Processing
Concur Expense Reimbursements

Project Portfolio Management

Grants & Contracts
Faculty Funds
Capital Projects
Gifts & Endowments

Planning & Budgeting

**Grouper
IDM**

What changes will affect most users?

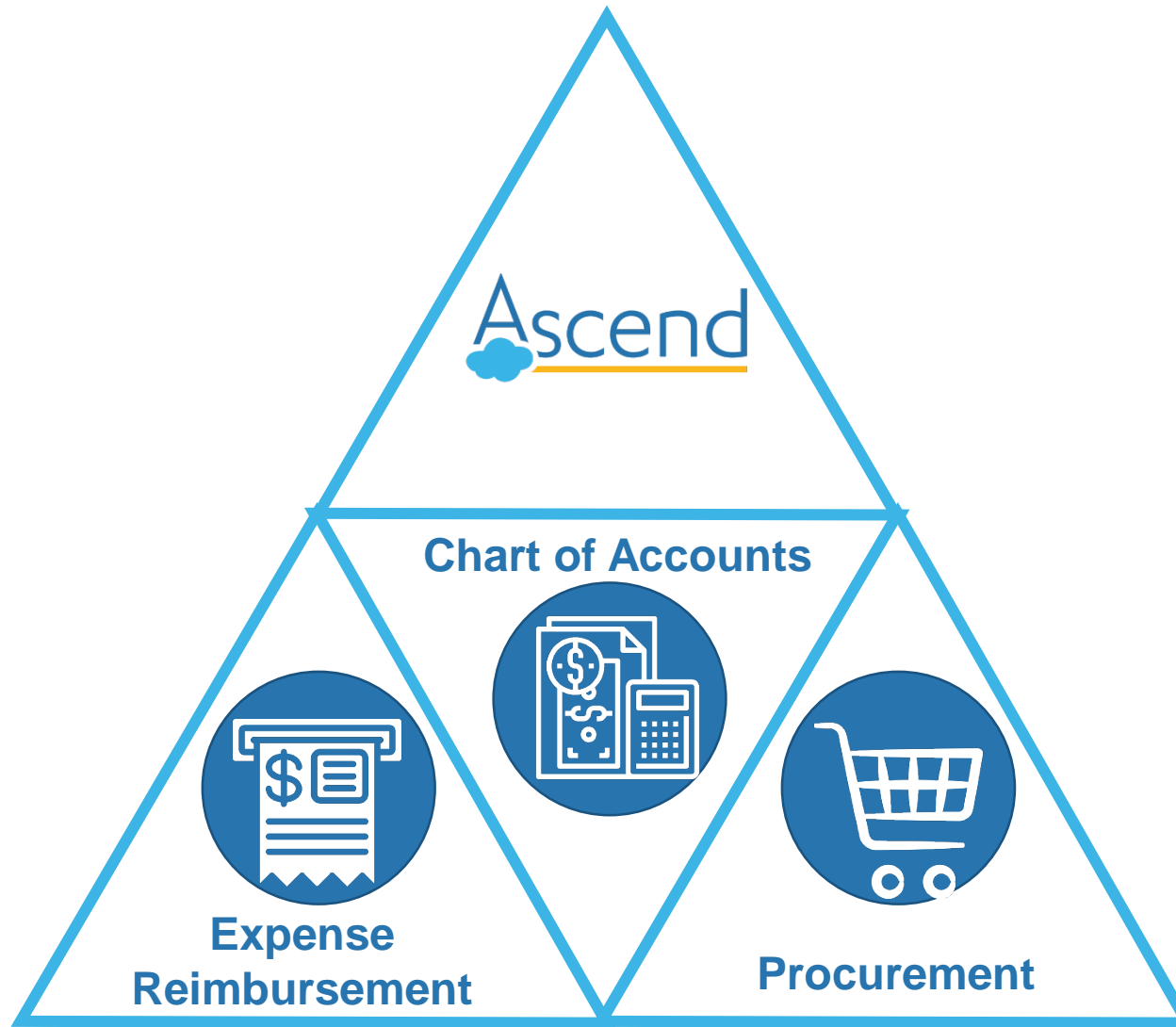


Chart of Account Types

UCLA's future state Chart of Accounts will leverage a multi-dimensional design to enhance the institution's reporting capabilities and simplify maintenance.

Current State

Linear

- May require significant intelligence in numbering/nomenclature
- Limited capacity to track funds that cross organizations or purposes
- May rely on extensive use of “account attributes” to meet reporting needs
- Limited capacity to track multidisciplinary activities and programs
- Often results in duplicative information captured across the Chart

Future State

Multi-Dimensional

- Increased flexibility for program fiscal management
- Improved capacity for tracking fiscal activity of cross disciplinary activities
- High scalability, supporting accounting needs of complex organizations
- May require less maintenance than linear CoA
- May be a significant departure from legacy CoA – steeper learning curve
- Requires care in design to result in best outcome

Multi-Dimensional Chart Structure Example

XXXXX
Fund

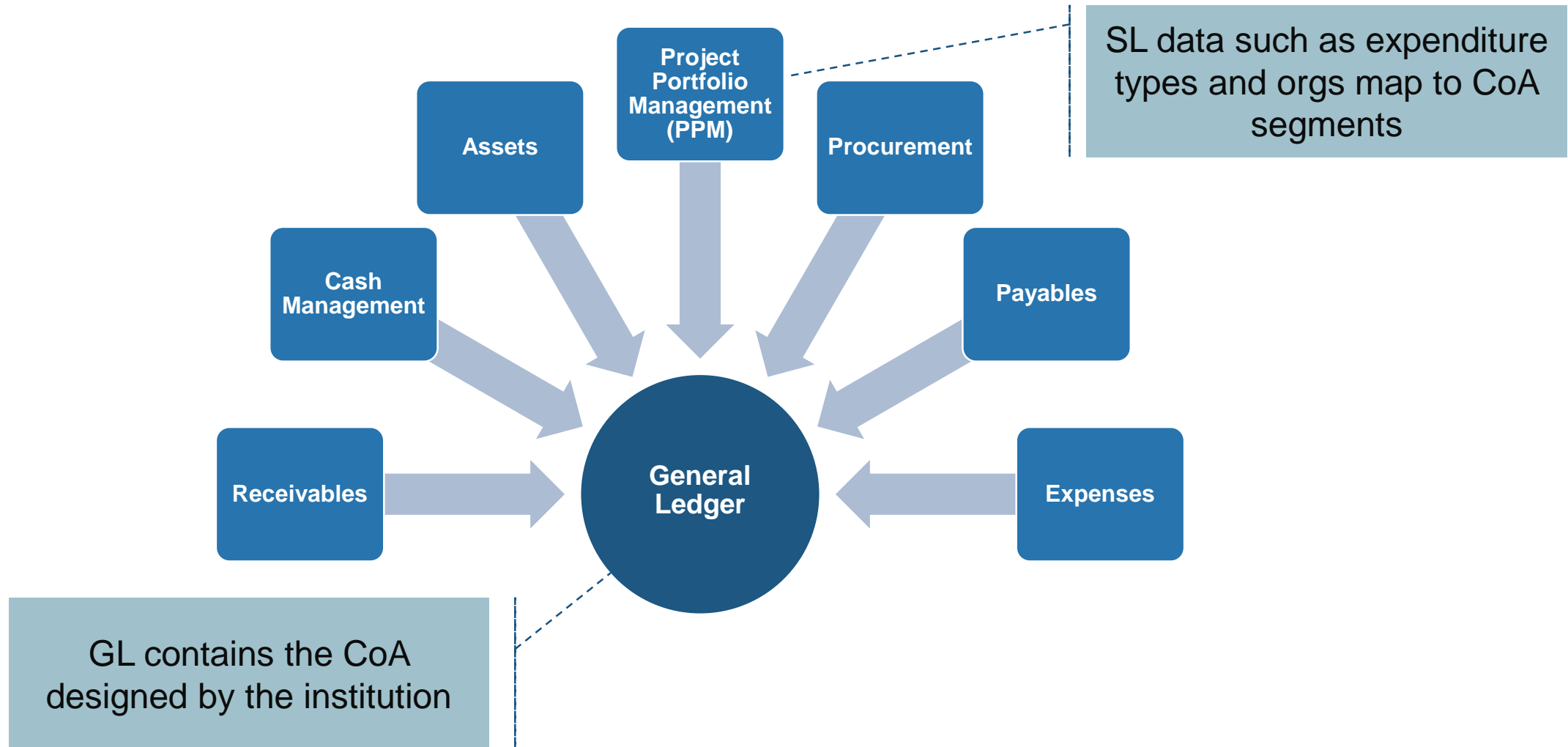
XXXXX
Account

XXXXX
Financial Unit

XXXXX
Program

XXXXX
Activity

Relationship Between GL & Sub-ledgers



UCLA Systems Impacted by Oracle Cloud

Evaluating Local Systems

Why?



All UCLA systems consuming financial data from QDB must use new key data elements. For e.g. new Chart of Accounts

What?



All directly and indirectly impacted systems will need updates (“retrofitting”) to work with the new CoA and other key data elements

How?



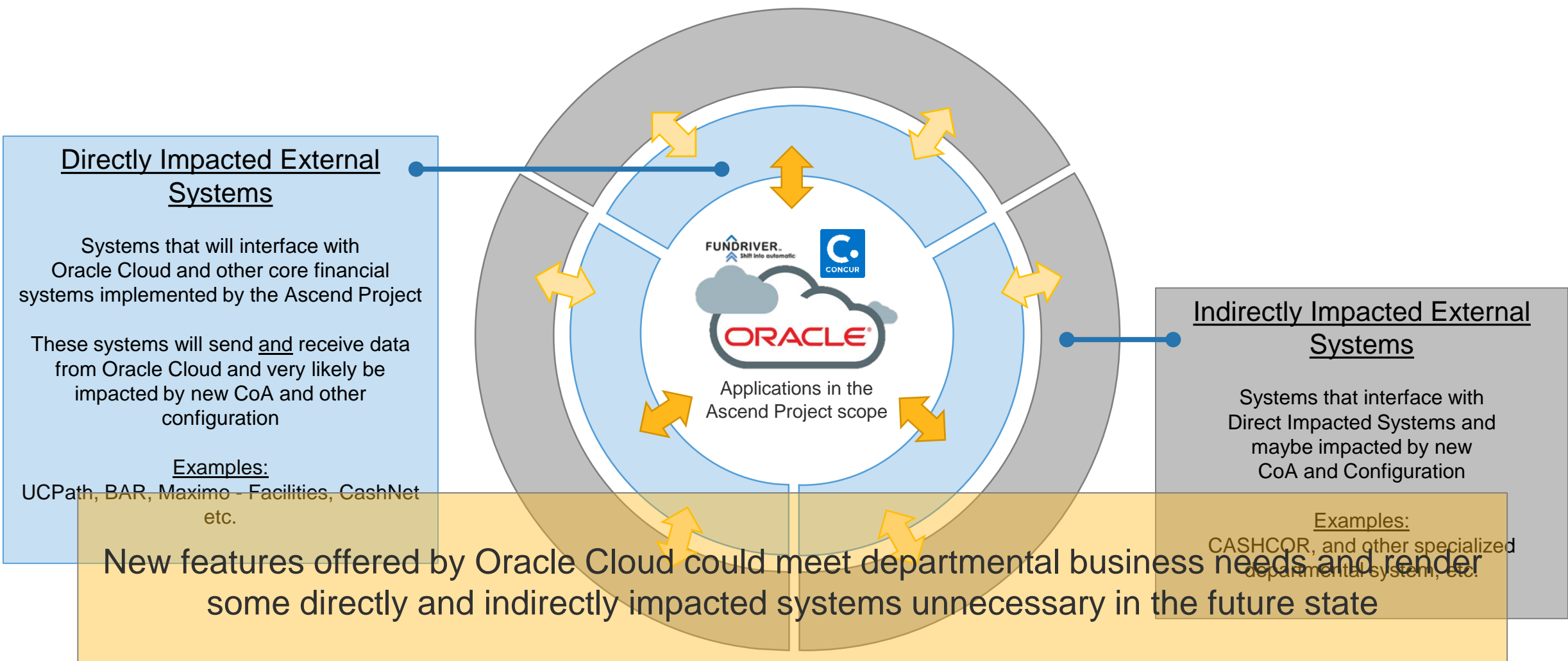
The Ascend project will coordinate an outreach to departmental and system owners

When?



Departmental and system owner outreach will occur through the end of the year

UCLA Systems Impacted by Oracle Cloud



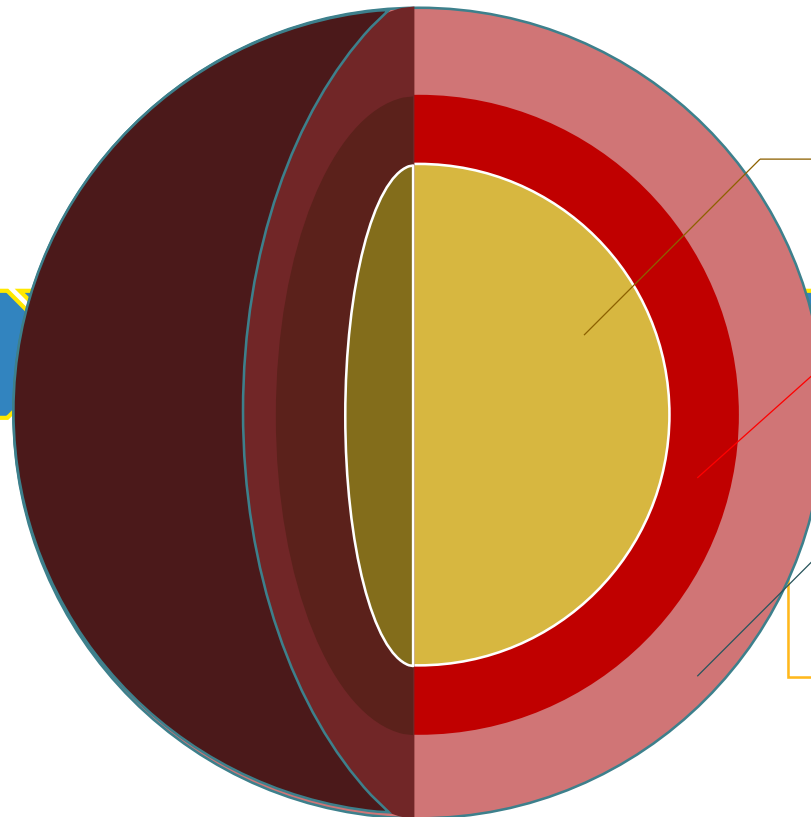
**HOW WILL I STAY
INFORMED ABOUT
ASCEND?**

The logo for Ascend is a white circle with a blue border. Inside the circle, the word "Ascend" is written in a blue, sans-serif font. A blue cloud icon is positioned to the left of the letter 'A', and a horizontal blue line is drawn under the word "Ascend".

Ascend



Team Expansion



Core Team:
Team Leads & Team Members

Departmental
experts and campus leaders
Team Leads are empowered to
make necessary and beneficial
changes to campus processes
and are supported by the project team
members

Building a Change Network

Business Partners Experts

- Provide **local context** for unit aiding in the “why” for change
- **Communicate business needs** by aiding in redesign process
- Drives **clarity to change** resulting in increased adoption and proficiency
- Influence broadly by **leading change** and **gathering feedback** to bring to the project team
- **Engage actively** in bi-monthly Business Partner Expert meetings

UCLA Business Partner Expert Groups:

1. DGSOM
2. Academic
3. Non-Academic
4. Research

100



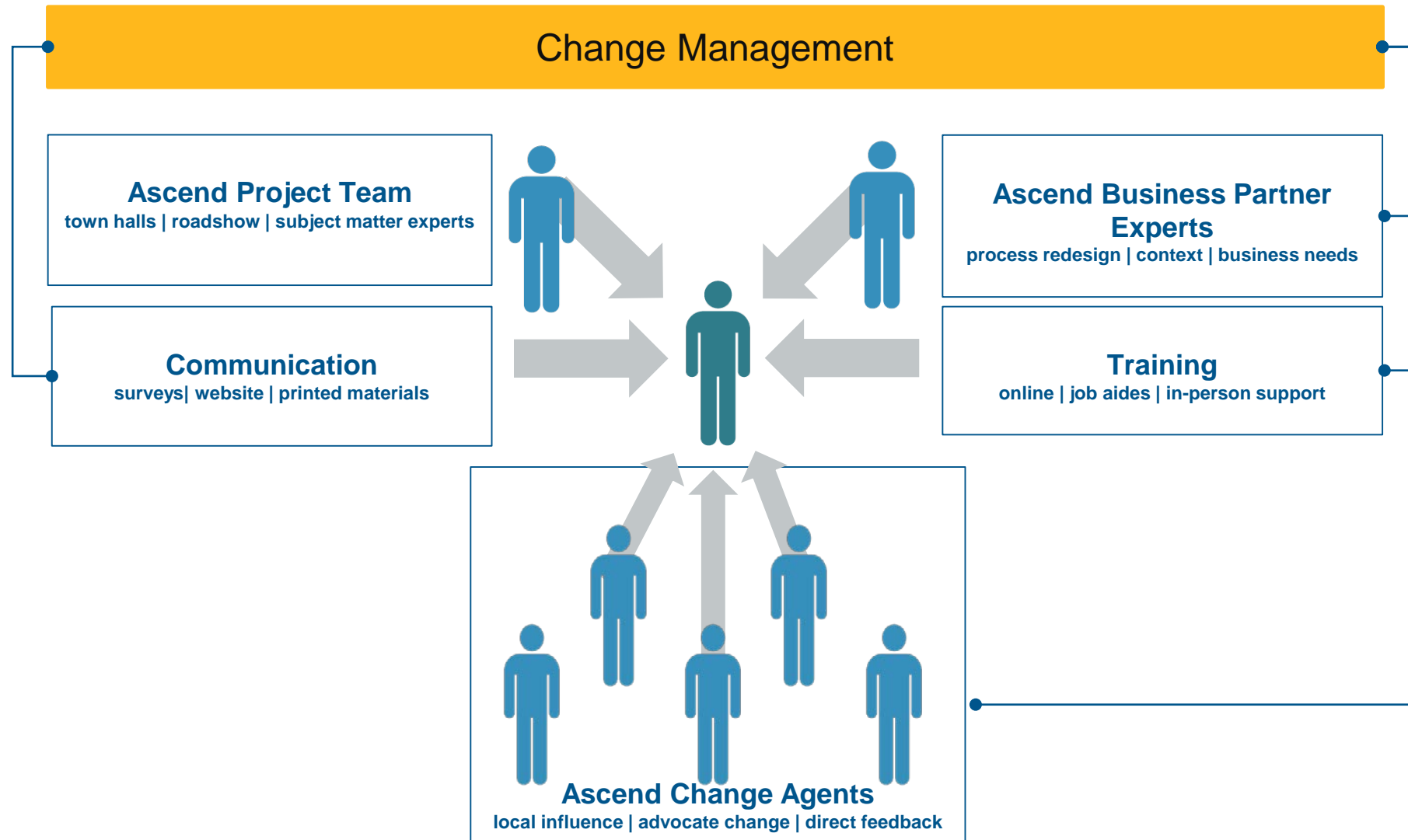
400+

Change Agents

- **Advocate change locally** amongst unit colleagues
- **Gather and share feedback** on changes with Business Partner Experts and Core Project Team
- **Promote readiness** by sharing information from bi-monthly Change Agent webinars
- **Support colleagues** during implementation to bring along thru change process (ADKAR)
- Go-to-person post-implementation to **reinforce change** and **provide resources**

Change Management Support

How does Change Management support this community?



NEXT STEPS



Want to stay informed?

Sign up for our Monthly Newsletter **HERE!**

Visit the Website: www.ascend.ucla.edu

Sign-up to be an Ascend Change Agent!



1. Visit www.ascend.ucla.edu
2. Hover over 'Change Network'
3. Click on 'Change Agent'
4. Sign up!

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Search this site

ABOUT CHANGE NETWORK LATEST UPDATES FAQs CONTACT US

BUSINESS PARTNER EXPERTS

CHANGE AGENTS

WHO ARE CHANGE AGENTS?

Change Agents are a subset of future end-users that help provide the project team with ongoing feedback to stay informed on project progress. Within their teams and departments, Change Agents help by acting as a channel for accurate and up-to-date information, providing reassurance to their peers and communities. In addition, they communicate questions or areas of concerns that arise to the project team, enabling the project team to adjust training and communications to better serve the needs of the wider University community.

CHANGE AGENT ROLES & RESPONSIBILITIES

- Change agents will need to commit an additional 2 hours, on a weekly basis
- Change agents are expected to attend webinars, events, and trainings
- Change agents will act as an initial point-of-contact for colleagues in their department, who may have additional questions about the system or project

If you are interested in becoming a Change Agent, please fill out the webform below.

(WE RECOMMEND USING GOOGLE CHROME OR MOZILLA FIREFOX TO VIEW AND SUBMIT THIS FORM PROPERLY.)

Name *

E-mail Address *

UCLA Department *



Q&A
Open Discussion



Email ascend@ucla.edu