



Extramural Fund Management

September 14, 2023

Agenda

Ascend

- **Ascend Research Post-Sprint 2 Demo: Invoice Method and Revenue Method**

Post-Sprint Demo Overview



What are post-Sprint demos and why are we facilitating them?

- Recorded **demonstrations of functionalities** covered in previous Sprint
- **Specific to a functional area**
- Allow campus SMEs and stakeholders to **provide feedback on system design**, which the program team can use to **inform future Sprints**



When are post-Sprint demos scheduled to take place?

- **One session per Sprint** per functional area
- Duration: **1-3 hours** each
- Sponsored Projects post-Sprint 2 occurred **Wednesday, September 13, 9:00-11:00 a.m. PST**



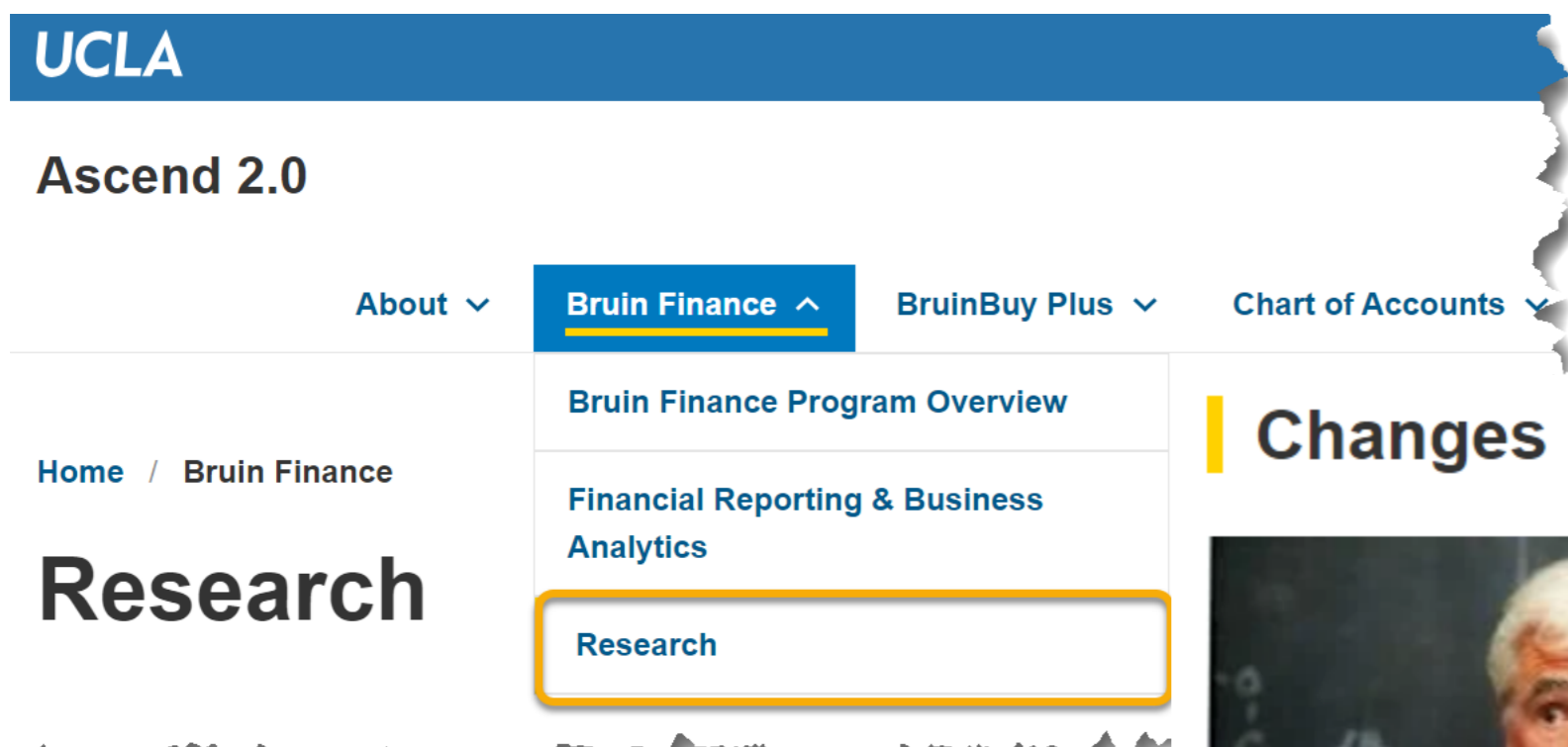
Who can participate in post-Sprint demos?

- **Campus SMEs** selected based on input from **Advisory Committees** & other members of program leadership
- Wider range of stakeholders can **share feedback** after **viewing demo recording**

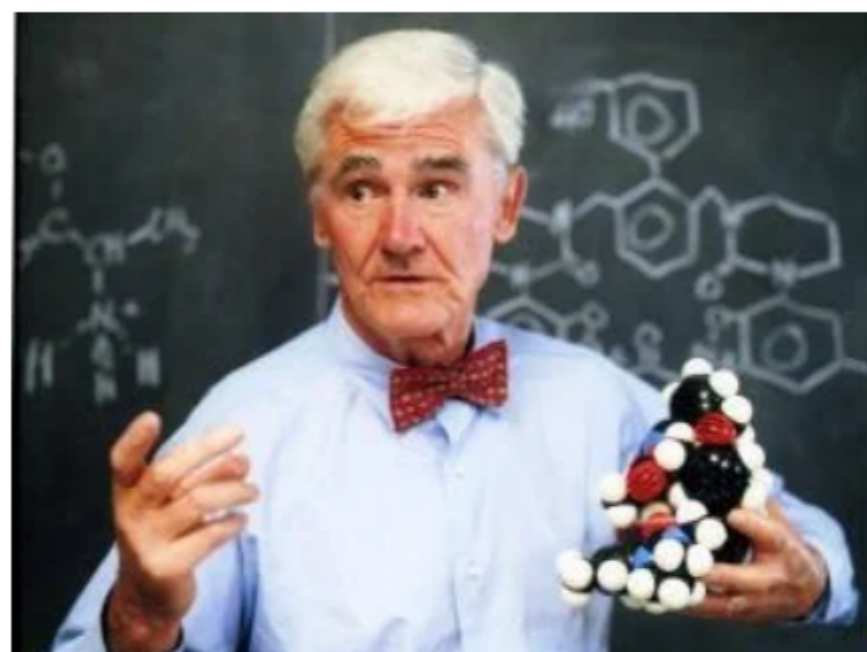
Post-Sprint Demo Access Previous Demos & Share Feedback



Research Post-Sprint Demos are located on the [Ascend Website](#) under the [Bruin Finance Tab](#) and [Research Sub-Tab](#)



Changes Coming to the Research Community



Learn more about some of the changes coming to the research community and what you can do to prepare by reviewing the topics below. You can also visit the [FAQs page](#) to find answers to commonly asked research questions.

[The Project Portfolio Management \(PPM\) Subledger and POETAF](#) ▾

[Subaward/Subcontract Invoice Approval in BruinBuy Plus](#) ▾

[Sponsored Projects Post-Sprint 1 Demo](#) ▴

The first Sponsored Projects post-Sprint demo took place on Monday, July 10th. Select representatives from across the research community joined this session to provide feedback on the first set of Sponsored Projects functionalities that were developed for Bruin Finance. Some topics that were reviewed include navigation, award creation workflow, and new reports.

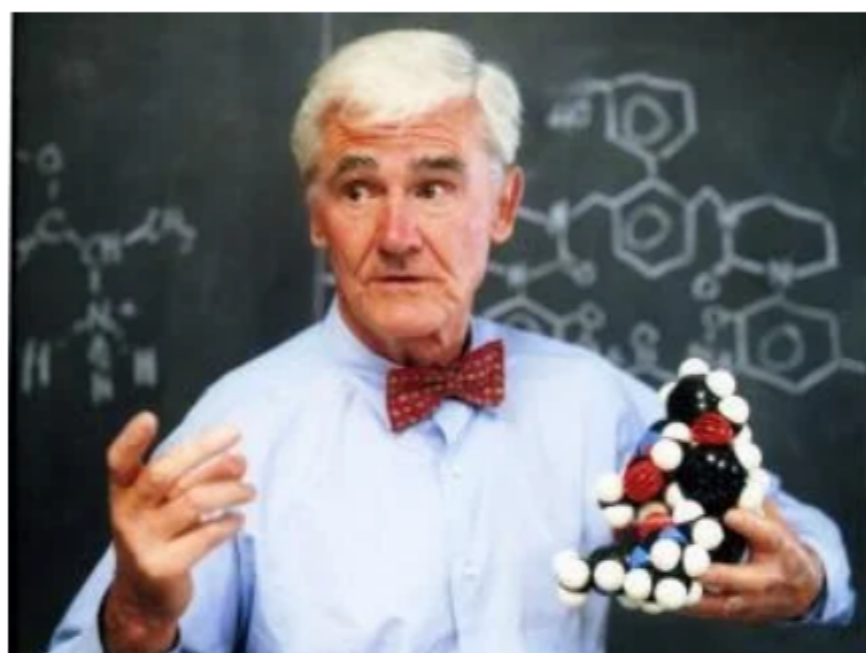
[Access the Sponsored Projects Post-Sprint Demo recording](#) 📺 to get a preview of the new system.

We want your feedback! Complete our [feedback survey](#) 📄 so we may share with our project team the functionalities you are excited about!

Post-Sprint Demo **Access Previous Demos & Share Feedback**

 **Share feedback with the Project Team by completing the [feedback survey](#).**

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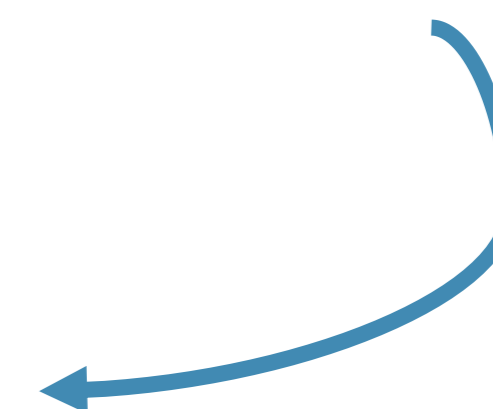
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We want to hear from you!



Post-Sprint Demo 2 Demo Topics

1 Introduction

2 Revenue Recognition: Current State vs. Future State

3 Invoicing Methods

1 Revenue Methods

2 Matrix of Invoice and Revenue Methods

3 Oracle Demo

Revenue Method and Invoice Method (1/2)

total Unallocated Amount 0.00 USD

Award Project Summary
View ▾ **Manage Project Budget**

| Project Name | Funding Source | Project Status | Funding Amount | Current Working Budget Amount in Project Currency | Baseline Budget Amount in Project Currency | Unbudgeted Amount |
|-----------------|---|----------------|----------------|---|--|-------------------|
| 621587_JD_18459 | CA-DEPARTMENT OF HEALTH CARE SERVICES (DHS) (C004204) | CG Active | 100,000.00 USD | 100,000.00 USD | 100,000.00 USD | 0.00 USD |
| 621588_JD_18459 | CA-DEPARTMENT OF HEALTH CARE SERVICES (DHS) (C004204) | CG Active | 15,000.00 USD | 15,000.00 USD | 15,000.00 USD | 0.00 USD |
| 621588_OH_18459 | CA-DEPARTMENT OF HEALTH CARE SERVICES (DHS) (C004204) | CG Active | 10,000.00 USD | 10,000.00 USD | 10,000.00 USD | 0.00 USD |
| 625931_TB_18459 | CA-DEPARTMENT OF HEALTH CARE SERVICES (DHS) (C004204) | CG Active | 75,000.00 USD | 75,000.00 USD | 75,000.00 USD | 0.00 USD |

Contract Summary ⓘ

Contract Lines

| Number | Name | Amount (USD) | Billing Details |
|--------|--------|--------------|-----------------|
| 1 | Line 1 | 100,000.00 | ⓘ |
| 2 | Line 2 | 100,000.00 | ⓘ |

Associated Projects

Project Name

- 621587_JD_18459
- 621588_JD_18459
- 621588_OH_18459
- 625931_TB_18459

Billing details are available within the Contract Summary section of the award

Revenue Method and Invoice Method (2/2)

The screenshot shows a software interface for project management. At the top, it displays 'Primary Sponsor CA-DEPARTMENT OF HEALTH CARE SERVICES (DHS)' and 'Total Unallocated Amount 0.00 USD'. The main section is titled 'Award Project Summary' and includes a 'View' dropdown and a 'Manage Project Budget' button. On the left, there is a list of project names: 621587_JD_18459, 621588_JD_18459, 621588_OH_18459, and 625931_TB_18459. Below this is a 'Contract Summary' section with a 'Contract Lines' table:

| Number | Name |
|--------|--------|
| 1 | Line 1 |
| 2 | Line 2 |

The 'Billing Details' window is open, showing the following information:

- Bill Plan Name: Bill Plan 1
- Revenue Plan Name: Revenue Plan 1
- Invoice Method: Amount Based**
- Revenue Method: Amount Based Revenue**
- Billing Cycle: Immediate
- Payment Terms: IMMEDIATE
- Labor Format: Labor Invoice Format
- Nonlabor Format: Non-labor Invoice Format
- Event Format: Event Invoice Format
- Billing Currency: USD
- Net Invoice: —
- Generated Invoice Status: Draft
- Bill-to Customer: CA-DEPARTMENT OF HEALTH CARE SERVICES (DHS)
- Bill-to Account: A004204
- Bill-to Account Description: Contracts and Grants
- Bill-to Site: 7975
- Bill-to Contact: atoxlwatwh y aaaalfaack
- Ship-to Customer: CA-DEPARTMENT OF HEALTH CARE SERVICES (DHS)
- Ship-to Account: A004204
- Ship-to Account Description: Contracts and Grants
- Ship-to Site: 9646
- Letter of credit: —
- Invoice Grouping: —
- Bill Set: 1
- Transaction Type: State Contracts

An 'OK' button is visible at the bottom right of the 'Billing Details' window.

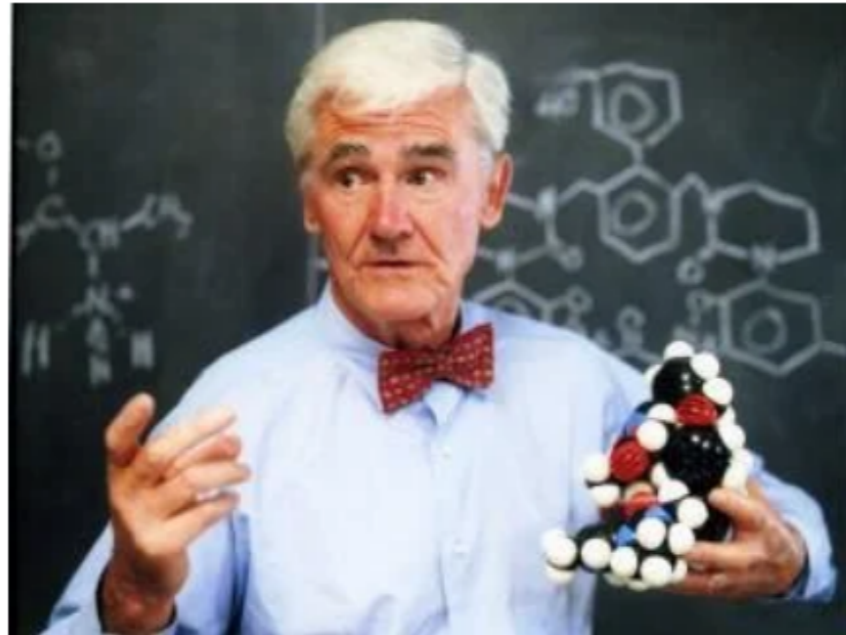
Invoice Method and Revenue Method are included in Billing Details

Post-Sprint Demo 2 Recording & Feedback Survey



Post-Sprint 2 Demo is now available on the Ascend website.

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[Sponsored Projects Post-Sprint 1 Demo](#) ▼

[Sponsored Projects Post-Sprint 2 Demo](#) ▲

The second Sponsored Projects post-Sprint demo took place on Wednesday, September 13th. Topics that were reviewed in the session include revenue recognition and a demo on navigation to see invoice and revenue methods.

[Access the Sponsored Projects Post-Sprint 2 Demo recording](#) to learn more about invoice and revenue methods in the new system.

We want your feedback! Complete our [feedback survey](#) so we may share with our project team the functionalities you are excited about!

We look forward to hearing your feedback!

[Feedback Survey](#)

Any Questions?

Contact Information

EFM Website

<https://efm.research.ucla.edu/>

Ascend Website

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

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