

An aerial photograph of Los Angeles, California, showing the city skyline with numerous skyscrapers in the distance and the UCLA campus in the foreground. The campus features several large, multi-story buildings, green spaces, and a parking lot. The image is used as a background for a presentation slide.

ASCEND 2.0

03/14/2024

AGENDA

- Award Budget Process and Project Creation
 - Award and project structure in PPM
 - When a separate project is created
 - Changes to budgeting
 - Introduction to new budget tool

PROJECTS & AWARDS IN THE PPM SUBLEDGER

The graphic below compares Awards, Contracts, and Projects in the future state (PPM Subledger) to their current state equivalents. In future state, separate projects will need to be created when there is a need to track budget and/or expenses separately.

CURRENT STATE (UCLA Financial System)



Today, **Fund** represents a sponsored award (contract, grant, cooperative agreement, etc.).



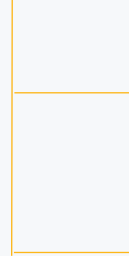
Today's combination of **expense account** and **cost center** is a subgrouping of Fund.



FUTURE STATE (Oracle PPM Subledger)



Tomorrow, the equivalent of Fund will be **Award**.



All billing information will be housed in the **Contracts** module.



We will budget at the **Project** level to manage the financial performance of award.



PROJECT CREATION

Certain Awards will require multiple Projects to segregate funding as required by Sponsor terms and conditions or due to requirements of Bruin Finance (Oracle). Projects will be created either through integration from PATS or from the new budget tool.

Central office will set up projects for:

- Multiple Payment Basis
- Concurrent multiple F&A Bases or Rates
- STIP B: for Project use
- Funding restricted by Award terms to be spent for defined purpose (e.g., diversity award)
- Restricted Carryforward
- Funding restricted until certain conditions are met
- Training Grant by Budget Period
- Cost Share*
- Funding restricted for capitalizable Fabrication*
- Program Income*

Departments will set up projects for:

- Multiple Project Owning Organizations
- Multiple PI or Co-Investigators
- Tracking expenses separately as required by terms of award (e.g., reporting by a different task or aim)
- Cost Share*
- Funding restricted for capitalizable Fabrication*
- Program Income*

**Some scenarios may be set up by either Central office or Department. More information will be shared as these business processes are defined.*

CHANGES TO BUDGETING PROCESS

The process by which central offices and departments allocate and re-allocate budgets is changing with the transition to Bruin Finance.

CURRENT STATE (UCLA Financial System)

- At inception of Award, ORA allocates the budget at the **direct** and **indirect level**
- Departments re-allocate the direct budget based on **category** as needed

FUTURE STATE (Oracle PPM Subledger)

- ORA allocates the budget by **category**, in accordance with terms and conditions of Award
- Departments re-allocate awarded budget only when the **sponsor restricts re-budgeting**
- Re-budget requests require **approval**

Why are we implementing this change?

- **Greater transparency** – Allows central offices and departments to see when **variances between the awarded budget and actual expenses require a re-budget request** to the sponsor
- **Alignment with sponsor** – Improves **compliance** to obtain sponsor's prior approval
- **Elimination of non-required transactions** – Eliminates re-budgeting activity **unless required**
- **Efficient invoicing** – Improves **efficiency in invoicing and financial reporting** processes

NEW BUDGET TOOL – FEATURES & FUNCTIONALITY

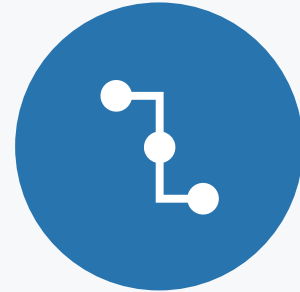
A new budget tool will be leveraged to enable the new process.



Departments and ORA will use the Budget Tool to enter **budgets/re-budgets** and **create Projects**



Workflow will route requests to approvers



Approved budgets/re-budgets and Projects will **integrate** to Bruin Finance

WORKFLOW

Budget Tool requests will route to approvers based on the user initiating the change



ORA User

ORA creates project/updates budget & clicks “approve” button → Integrates to Bruin Finance



Project Manager in the CFU that owns the award (Today’s home department fund manager)

Home creates project/updates budget → ORA reviews & approves → Integrates to Bruin Finance

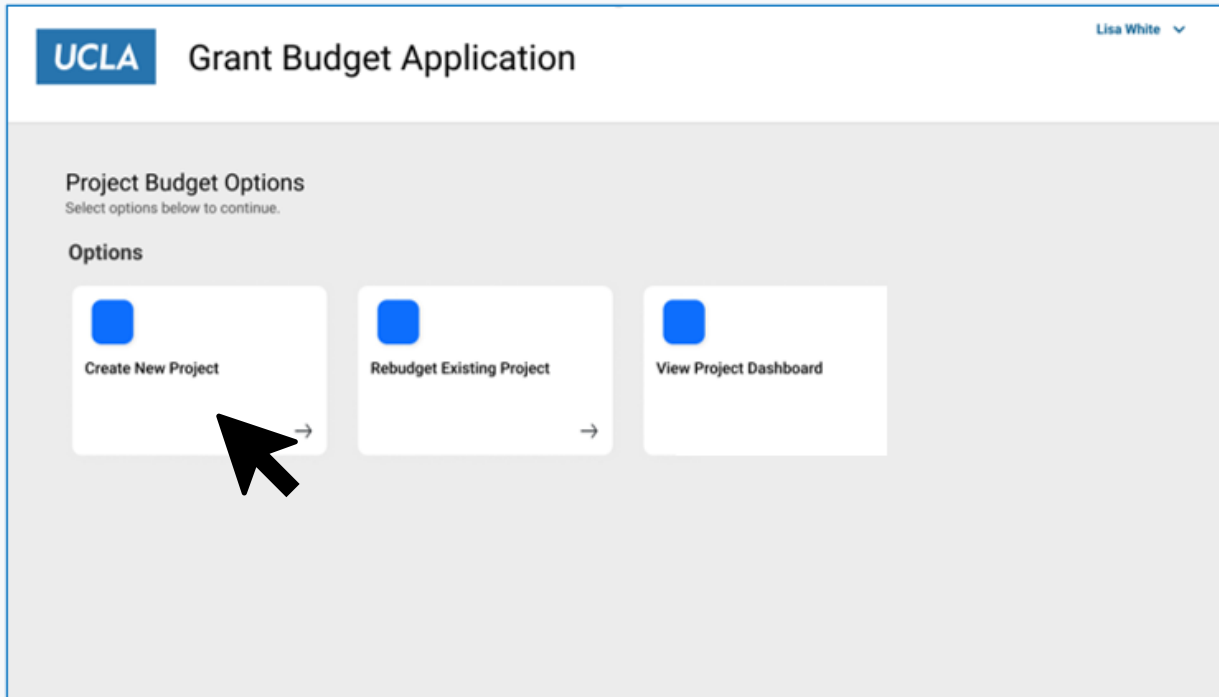


Project Manager in the CFU that does not own the award (Today’s linked department fund manager)

Link creates project/updates budget → Home Project Manager reviews & approves → ORA reviews & approves → Integrates to Bruin Finance

DEPARTMENT USERS – LANDING PAGE

We are going to look at [Create New Project](#) then [View Project Dashboard](#)



DEPARTMENT USERS – CREATE NEW PROJECT

Search Award

Users can **search** based on a variety of criteria to identify the Award.

The screenshot displays the 'UCLA Grant Budget Application' interface. At the top right, the user 'Lisa White' is logged in. The main heading is 'Create New Project'. Below this is a 'Search Award' section with a search bar containing the placeholder text 'Search award number, award name, etc.' and a 'Search' button. To the right of the search bar is an 'Advanced Search' link. A 'Search Fields' modal is open, showing six input fields: 'Award Number', 'Award Owning Organization', 'Principal Investigator', 'Project Number', 'Sponsor Name', and 'Sponsor Award Number'. At the bottom of the modal are 'Cancel' and 'Apply' buttons. A mouse cursor is pointing at the 'Apply' button. Below the search area, the text reads 'No Data to display. Please make a search above to render search results.'

DEPARTMENT USERS – CREATE NEW PROJECT

Award Search Results

Awards matching the entered criteria will appear in the **Results Grid**.

UCLA Grant Budget Application Lisa White ▾

Create New Project

Search Award


Principal Investigator Rachel Nelson ✕ Sponsor Name National Science Foundation ✕

Result

[Export to Excel](#)

"Select" an award to view project detail

Award Number	Principal Investigator	Award Status	Award Owning Organization	Sponsor Name	Instrument Type	
7386243	Rachel Nelson	Active	8834612 - Mathematic...	National Science...	Grant	Select
9786252	Rachel Nelson	Expired	8834612 - Mathematic...	National Science...	Grant	Select

Showing 1/10 of 30 

DEPARTMENT USERS – CREATE NEW PROJECT

Project List

Upon selecting an Award users will see all Projects on the Award in the **Project List**.

UCLA Grant Budget Application Lisa White ▾

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Create New Project

Award Number 2023252 - Project List

All projects for the award are listed.

Taylor - MTDC - 1239812 - MATHEMATICS - Curtis Center - 56.00% - MTDC - AA0018491					⤴
AA0018491	Budget: \$XXXX	Actual: \$XXXX	Commitment: \$XXXX	Available: \$XXXX	
Moore - MTDC - 1239813 - EDU - Graduate - 56.00% - MTDC - AA0018492					⤴
AA0018492	Budget: \$XXXX	Actual: \$XXXX	Commitment: \$XXXX	Available: \$XXXX	
Sanchez - Cost Share - MTDC - 1239814 - AVC Research Administration - 56.00% - MTDC - AA0018493					⤴
AA0018493	Budget: \$XXXX	Actual: \$XXXX	Commitment: \$XXXX	Available: \$XXXX	
Han - Cost Share - MTDC - 1239815 - BIO - Research - 56.00% - MTDC - AA0018494					⤴
AA0018494	Budget: \$XXXX	Actual: \$XXXX	Commitment: \$XXXX	Available: \$XXXX	
Award Total	Budget: \$xxxx	Actual: \$xxxx	Commitment: \$xxxx	Available: \$xxxx	

Cancel **Create New Project**

DEPARTMENT USERS – CREATE NEW PROJECT

New Project Information

Users will enter **demographic information** required to create the Project.

Certain demographics will **automatically populate** based on built in logic.

Award Number 9782498

New Project Information

Project Type *	Project Reference	Project Owning Organization *
<input type="text" value="Select"/>	<input type="text" value="Enter"/>	<input type="text" value="Select"/>
Project Start Date *	Project End Date *	Collaborating Investigator *
<input type="text" value="Enter"/>	<input type="text" value="Enter"/>	<input type="text" value="Select"/>
Award Start Date MM/DD/YYYY	Award End Date MM/DD/YYYY	Funding Source/Sponsor *
<input type="text" value="Enter"/>	<input type="text" value="Enter"/>	<input type="text" value="Select"/>
F&A Base *	F&A Rate *	Fabrication Number
<input type="text" value="Enter"/>	<input type="text" value="Enter"/>	<input type="text" value="Enter"/>

Description (2,000 characters)

[Back](#) [Create](#)

DEPARTMENT USERS – CREATE NEW PROJECT

Project Budget

New Project will appear for users to **allocate budget** in accordance with terms and conditions.

User can **attach documents** as needed.

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Create New Project

Award Number 9782498 - Project Budget

Project Detail - Other Funding Sources										
	AA0018491			AA0018494			New Project	Cost Share Subtotal		
	Taylor - Cost Share - MTDC - 1239812 - AVC Research Administration - 56.00% - MTDC - AA0018491			Hui - Cost Share - MTDC - 1239815 - BIO Research - 56.00% - MTDC - AA0018494			Hurley - Cost Share - MTDC - 9374860 - EHS - Research - 10.00% - TDC			
	Current Budget	Change in Budget	Updated Budget	Current Budget	Change in Budget	Updated Budget	Budget	Current Budget	Change in Budget	Updated Budget
Salaries and Wages	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Employee Benefits	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Equipment	\$0.00	<input type="text" value="\$20,000.00"/>	\$20,000.00	\$0.00	<input type="text" value="\$10,000.00"/>	\$10,000.00	<input type="text" value="\$10,000.00"/>	\$0.00	\$40,000.00	\$40,000.00
Travel Domestic	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Travel Foreign	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Materials & Supplies	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$10,000.00"/>	\$10,000.00	<input type="text" value="\$0.00"/>	\$0.00	\$10,000.00	\$10,000.00
Publication Costs	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Consultants	\$0.00	<input type="text" value="\$10,000.00"/>	\$10,000.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$10,000.00	\$10,000.00
Computer Services	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Subawards	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Space Rental	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Stipends, Tuition & Fees	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Participant Support Costs	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Patient Care	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Other Direct Costs	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00
Total Direct Cost	\$0.00	\$30,000.00	\$30,000.00	\$0.00	\$20,000.00	\$20,000.00	\$10,000.00	\$0.00	\$60,000.00	\$60,000.00
F&A Base Included	<input type="text" value="\$0.00"/>			<input type="text" value="\$0.00"/>			<input type="text" value="\$0.00"/>			
F&A Base Excluded	<input type="text" value="\$0.00"/>			<input type="text" value="\$0.00"/>			<input type="text" value="\$0.00"/>			
Facilities and Administration Costs	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	<input type="text" value="\$0.00"/>	\$0.00	0.00	\$0.00
Grand Total	\$0.00	\$30,000.00	\$30,000.00	\$0.00	\$20,000.00	\$20,000.00	\$10,000.00	\$0.00	\$60,000.00	\$60,000.00

Documents Attach

DEPARTMENT USERS – CREATE NEW PROJECT

Award Summary

After entering the new Project budget the user will be routed to the **Award Summary** which will show all Projects on the award broken down between **Sponsored Funding** and **Other Funding sources**

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Award Summary

Award Number 9782498

	Sponsored Funding Sources						Total Sponsored Funding Sources				
	A0081143 Johnson - MTDC - 9374523 - MATHEMATICS - Curtis Center - 56.00% - MTDC - A0081143			A00840998 Johnson - MTDC - 9374771 - EDU - Graduate - 56.00% - MTDC - A00840998			Sum of Project Types: Sponsored, Sponsored Capital, Fabrication, Restricted Carryforward, Restricted Funding				
	Current Budget	Change in Budget	Updated Budget	Current Budget	Change in Budget	Updated Budget	Awarded Budget	Revised Budget	Variance	% Variance of Award Total	% Variance of Line Item
Salaries and Wages	\$0.00	\$100,000.00	\$100,000.00	\$0.00	\$10,000.00	\$10,000.00	\$0.00	\$110,000.00	\$110,000.00	65%	100%
Employee Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	\$0.00	\$10,000.00	\$10,000.00	6%	100%
Travel Domestic	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Travel: Foreign	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Materials & Supplies	\$0.00	\$20,000.00	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20,000.00	\$20,000.00	12%	100%
Publication Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Consultants	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Computer Services	\$0.00	\$13,000.00	\$13,000.00	\$0.00	\$10,000.00	\$10,000.00	\$0.00	\$23,000.00	\$23,000.00	14%	100%
Subawards	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Space Rental	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Stipends, Tuition & Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Participant Support Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Patient Care	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	0%
Other Direct Costs	\$133,000.00	-\$133,000.00	\$0.00	\$30,000.00	-\$30,000.00	\$0.00	\$163,000.00	\$0.00	-\$163,000.00	-96%	100%
Total Direct Cost	\$133,000.00	\$0.00	\$133,000.00	\$30,000.00	\$0.00	\$30,000.00	\$163,000.00	\$163,000.00	\$0.00	0%	0%
Facilities and Administration Costs	\$5,000.00	0.00	\$5,000.00	\$2,000.00	\$0.00	\$2,000.00	\$7,000.00	\$7,000.00	\$0.00	0%	0%
Grand Total	\$138,000.00	\$0.00	\$138,000.00	\$32,000.00	\$0.00	\$32,000.00	\$170,000.00	\$170,000.00	\$0.00	0%	0%

Documents [+](#) [Attach](#)

DEPARTMENT USERS – CREATE NEW PROJECT

Award Summary

Sum of all Project Types will appear on the right

Users enter justification for the creation of the Project which will be used during the approval process.

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Award Summary

Award Number 2023252

Total Sponsored Funding Sources					Total Other Funding Sources					Sum of all Project Types				
Sum of Project Types: Sponsored, Sponsored Capital, Administration, Restricted Employment, Restricted Funding					Sum of Project Types: ETR, Program Income, Cost Share									
Accounted Budget	Revised Budget	Variance	% Variance of Award Total	% Variance of Line Item	Current Budget	Revised Budget	Variance	% Variance of Award Total	% Variance of Line Item	Budget	Revised Budget	Variance	% Variance of Budget Total	% Variance of Line Item
\$0.00	\$110,000.00	\$110,000.00	0%	100%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$110,000.00	\$110,000.00	0%	100%
Salaries and Wages														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Employee Benefits														
\$0.00	\$10,000.00	\$10,000.00	0%	100%	\$0.00	\$40,000.00	\$40,000.00	0%	100%	\$0.00	\$40,000.00	\$40,000.00	0%	100%
Equipment														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Travel Domestic														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Travel Foreign														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Materials Supplies														
\$0.00	\$20,000.00	\$20,000.00	0%	100%	\$0.00	\$10,000.00	\$10,000.00	0%	100%	\$0.00	\$30,000.00	\$30,000.00	0%	100%
Publication Costs														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Consultants														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$10,000.00	\$10,000.00	0%	100%	\$0.00	\$10,000.00	\$10,000.00	0%	100%
Computer Services														
\$0.00	\$20,000.00	\$20,000.00	0%	100%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$20,000.00	\$20,000.00	0%	100%
Subawards														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Space Rental														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Stipends, Tuition & Fees														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Participant Support Costs														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Patient Care														
\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%
Other Direct Costs														
\$143,000.00	\$0.00	-\$143,000.00	-100%	100%	\$0.00	\$0.00	\$0.00	0%	0%	\$143,000.00	-\$143,000.00	\$0.00	-100%	100%
Total Direct Cost	\$143,000.00	-\$143,000.00	-100%	100%	\$0.00	\$40,000.00	\$40,000.00	100%	0%	\$143,000.00	-\$40,000.00	\$103,000.00	0%	0%
Facilities and Administration Costs														
\$7,000.00	\$7,000.00	\$0.00	0%	0%	\$0.00	\$0.00	\$0.00	0%	0%	\$7,000.00	\$0.00	\$7,000.00	0%	0%
Grand Total	\$150,000.00	-\$170,000.00	-100%	0%	\$0.00	\$40,000.00	\$40,000.00	100%	0%	\$150,000.00	-\$170,000.00	\$20,000.00	0%	0%

Documents Attach

Justification *

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

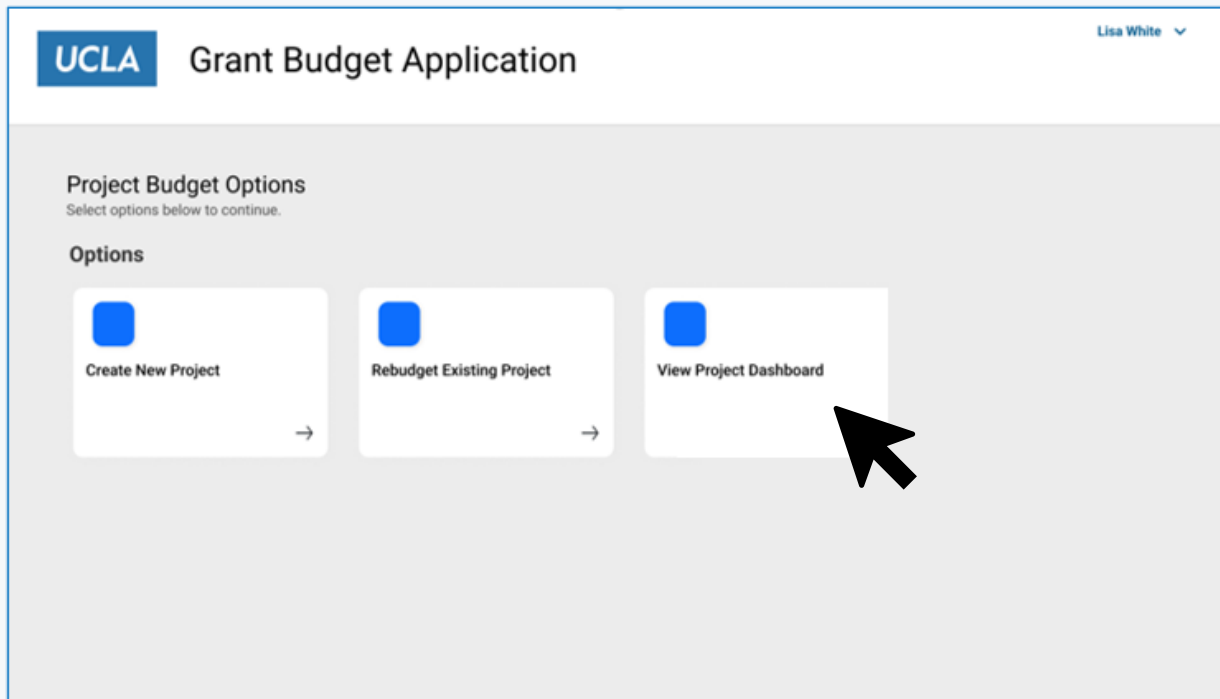
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Cancel Withdraw Save
Validate Submit for Approval

DEPARTMENT USERS – LANDING PAGE

Now we will look at the [View Project Dashboard](#)



DEPARTMENT USERS – DASHBOARD/WORKLIST

Project Dashboard

Dashboard contains a **Worklist** with demographics on the Award including the status of the Project creation or rebudget.

The screenshot displays the 'Project Dashboard' for the 'UCLA Grant Budget Application'. It features a search bar for 'Search Requests' and a 'Worklist' table. The table lists 10 projects, all in 'DRAFTED' status, with columns for Request ID, Award No., Principal Investigator, Organization, Sponsor Name, Status, and Oracle Transfer Status. A pagination control at the bottom shows 'Display 10' and 'Showing 1/10 of 30'.

Request ID	Award No.	Principal Investigator	Organization	Sponsor Name	Status	Oracle Transfer Status
1	20286123	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
2	20286124	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
3	20286125	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
4	20286126	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
5	20286127	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
6	20286128	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
7	20286129	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
8	20286130	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
9	20286131	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select
10	20286132	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	Select

DEPARTMENT USERS – DASHBOARD/WORKLIST

Search Fields

Users can update the **search fields** to customize the results

The screenshot displays the 'UCLA Grant Budget Application' interface. At the top, it shows the user's name 'Lisa White'. The main section is titled 'Project Dashboard' and contains a 'Search Requests' area with a search bar and an 'Advanced Search' link. Below this is a 'Worklist' table with columns for Request ID, Requestor, Request Date, and Date Applied. A 'Search Fields' modal is open, allowing users to filter results by Requestor, Request Status, Award Number, Award Name, Sponsor Name, Award Owning Organization, Approver, Action Type, Project Owning Organization, Principal Investigator, and Date Type. The Date Range is set to 06/10/2023 to 06/10/2023. The 'Apply' button is highlighted with a mouse cursor.

Request ID	Requestor	Request Date	Date Applied
1	XXX	DD/MM/YYYY	
2	XXX	DD/MM/YYYY	
3	XXX	DD/MM/YYYY	
4	XXX	DD/MM/YYYY	
5	XXX	DD/MM/YYYY	
6	XXX	DD/MM/YYYY	
7	XXX	DD/MM/YYYY	
8	XXX	DD/MM/YYYY	
9	XXX	DD/MM/YYYY	
10	XXX	DD/MM/YYYY	

DEPARTMENT USERS – DASHBOARD/WORKLIST

Worklist Results

The **Status** column will show where the request is in the approval process.

The **Oracle Transfer Status** will show if the request has been integrated to Oracle.

The screenshot displays the 'Project Dashboard' for a 'Grant Budget Application' at UCLA. It features a search bar for requests and a table with 10 rows of request data. The 'Status' column is highlighted with a red box, and the 'Oracle Transfer Status' column is highlighted with a blue box. A black arrow points to the green dot in the 'Oracle Transfer Status' column for the first row.

Request ID	Award No.	Principal Investigator	Organization	Sponsor Name	Status	Oracle Transfer Status	
1	20286123	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	ORA APPROVED	●	Select
2	20286124	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	ORA APPROVED	●	Select
3	20286125	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DEPT. RETURNED	●	Select
4	20286126	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	PENDING DEPT. APPROVAL	●	Select
5	20286127	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	●	Select
6	20286128	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	PENDING ORA APPROVAL	●	Select
7	20286129	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	ORA RETURNED	●	Select
8	20286130	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	ORA APPROVED	●	Select
9	20286131	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	ORA APPROVED	●	Select
10	20286132	Louise Wallace	9343400-9343400 - MATHEMATICS - ...	National Science Foundation (NSF)	DRAFTED	●	Select

CONTACT INFORMATION

KATIE CADLE

kcadle@research.ucla.edu

ASCEND 2.0 RESEARCH WEBSITE

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