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

Gene D. Block
Chancellor
For UCLA, By UCLA
WHY ASCEND?
Current Financial System vs. Needs

**Mainframe Technology**
- Maintenance
- Limited improvements
- Long-term stability

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

<table>
<thead>
<tr>
<th>1980s</th>
<th>Today</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating Budget</td>
<td>$849M</td>
</tr>
<tr>
<td>Grants &amp; Contracts Revenue</td>
<td>$119M</td>
</tr>
<tr>
<td>Medical Center Revenue</td>
<td>$169M</td>
</tr>
<tr>
<td>FTEs</td>
<td>17.6K</td>
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</table>
UCLA’s Use of Shadow Systems

- UCLA has experienced tremendous growth in terms of size and complexity.
- Increased reporting and business process needs.
- Exponential increase in use of shadow and supplemental systems.
UCLA’s Core Financial System Today

Processing transactions shouldn’t be this difficult!
Opportunity to Leapfrog Technology

1980s Mainframe

1990s Two Generations Client-server

2018 SaaS/Cloud

Where we are today

"Conservative" upgrade to traditional ERP

"Leapfrog" to next generation core administrative system with ability to stay current
Administrative Systems Landscape

Ranking vs. Information technology landscape

1980s – Mainframe era 1990s – Client/Server era 2000s – Mobile/Cloud era

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

Source: 2018 US News National Universities Rankings
## Project Goals

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Effectiveness</strong></td>
<td>Support strategic decision-making to ensure quality and aggregation of data</td>
</tr>
<tr>
<td><strong>Efficiency</strong></td>
<td>Improve productivity (value-add, low risk, ease ....) through streamlined</td>
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<tr>
<td></td>
<td>business processes to spend less time on non-mission critical tasks</td>
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<tr>
<td><strong>Cost Effective</strong></td>
<td>Enable appropriate use of University resources</td>
</tr>
<tr>
<td><strong>Usability</strong></td>
<td>Provide mobility and self-service capabilities including ease of access to data</td>
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<tr>
<td><strong>Scalable</strong></td>
<td>Deliver a scalable system environment that will grow with the university</td>
</tr>
<tr>
<td><strong>Quality</strong></td>
<td>Ensure quality of data to guide current and future endeavors</td>
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WHAT’S ASCEND?
Project Timeline

<table>
<thead>
<tr>
<th>2018</th>
<th>2019</th>
<th>2020</th>
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<tbody>
<tr>
<td>Q1</td>
<td>Q1</td>
<td>Q1</td>
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<tr>
<td>Q2</td>
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<tr>
<td>Q3</td>
<td>Q3</td>
<td>Q3</td>
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<tr>
<td>Q4</td>
<td>Q4</td>
<td>Q4</td>
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- **Plan**
  - Strategy & Familiarization

- **Design**
  - Workshops & Architecture

- **Configure**
  - Test (5 Cycles)

- **Validate**
  - Go-Live

- **Deploy**

- **Stabilize**
# Iterative Nature of Cloud Projects

<table>
<thead>
<tr>
<th>2018</th>
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<th>2020</th>
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<tbody>
<tr>
<td>Q1</td>
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<td>Q2</td>
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<td>Q3</td>
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<tr>
<td>Q4</td>
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**Plan**
- Workshops

**Design**
- Unit Testing

**Configure**
- End-to-End Testing

**Validate**

**Deploy**

**Stabilize**
Ascend Project Timeline

Today

Plan
- Product Familiarization
- Discovery
  - P2P
  - Research
  - Budget

Design
- CRP 1
- Design Workshops
- CRP 2
- Discovery
- P2P
- Research
- Budget

Configure
- CRP 3
- COA Redesign
- Business Process Mapping
  - BPA 1
  - Business Process Mapping
  - BPA 2
  - Business Process Mapping
  - BPA 3

Validate
- SIT
- UAT
- Carryover
- Cutover

Deploy
- Go Live
- UAT
- Carryover
- Cutover

Stabilize
- Go Live
# Project Governance Membership

## Executive Committee

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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<tbody>
<tr>
<td>Michael Beck</td>
<td>(Administration)</td>
</tr>
<tr>
<td>Gregg Goldman</td>
<td>(Finance)</td>
</tr>
<tr>
<td>Rhea Turtletaub</td>
<td>(Ext. Affairs/Foundation)</td>
</tr>
<tr>
<td>Roger Wakimoto</td>
<td>(Research)</td>
</tr>
<tr>
<td>Scott Waugh</td>
<td>(Provost)</td>
</tr>
<tr>
<td>John C. Mazziotta</td>
<td>(Health Sciences)</td>
</tr>
<tr>
<td>Susan Cochran</td>
<td>(Academic Senate)</td>
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## Ex Officio Members

<table>
<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Allison Bair-James</td>
<td>(Finance)</td>
</tr>
<tr>
<td>Omar Noorzai</td>
<td>(BTO)</td>
</tr>
<tr>
<td>Jeff Roth</td>
<td>(Planning &amp; Budget)</td>
</tr>
<tr>
<td>Julie Sina</td>
<td>(External Affairs)</td>
</tr>
<tr>
<td>Marcia Smith</td>
<td>(Research)</td>
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</tbody>
</table>

## Steering Committee

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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<tbody>
<tr>
<td>Frank Wada</td>
<td>(Registrar)</td>
</tr>
<tr>
<td>Ed Pierce</td>
<td>(Audit &amp; Advisory)</td>
</tr>
<tr>
<td>Kamyar Zaré</td>
<td>Program Director</td>
</tr>
<tr>
<td>Ryan McDaniel</td>
<td>Huron Exec. Sponsor</td>
</tr>
<tr>
<td>Gita Agrellas</td>
<td></td>
</tr>
<tr>
<td>Mike Van Norman</td>
<td>(UCLA ITS)</td>
</tr>
<tr>
<td>Jason Schober</td>
<td>Project Director</td>
</tr>
<tr>
<td>Vivek Cherian</td>
<td>Project Manager</td>
</tr>
</tbody>
</table>

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<tr>
<td>Mike Gillett</td>
<td></td>
</tr>
<tr>
<td>Margaret Berry</td>
<td></td>
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<tr>
<td>Oracle</td>
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Cloud Transformation Methodology

Build

Requirements Driven
• Assumed Customization
• Scope Creep

Solution Driven
• Drives Improvement
• Quicker delivery to the user

“What do you want?”

“How do we make this work for you?”

Buy

“Buy”
WHAT’S CHANGING?
What changes will affect most users?

Chart of Accounts

Expense Reimbursement

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

<table>
<thead>
<tr>
<th>Current State</th>
<th>Future State</th>
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<tbody>
<tr>
<td><strong>Linear</strong></td>
<td><strong>Multi-Dimensional</strong></td>
</tr>
<tr>
<td>• May require significant intelligence in numbering/nomenclature</td>
<td>• Increased flexibility for program fiscal management</td>
</tr>
<tr>
<td>• Limited capacity to track funds that cross organizations or purposes</td>
<td>• Improved capacity for tracking fiscal activity of cross disciplinary activities</td>
</tr>
<tr>
<td>• May rely on extensive use of “account attributes” to meet reporting needs</td>
<td>• High scalability, supporting accounting needs of complex organizations</td>
</tr>
<tr>
<td>• Limited capacity to track multidisciplinary activities and programs</td>
<td>• May require less maintenance than linear CoA</td>
</tr>
<tr>
<td>• Often results in duplicative information captured across the Chart</td>
<td>• May be a significant departure from legacy CoA – steeper learning curve</td>
</tr>
<tr>
<td></td>
<td>• Requires care in design to result in best outcome</td>
</tr>
</tbody>
</table>

Multi-Dimensional Chart Structure Example:

- **Fund**
- **Account**
- **Financial Unit**
- **Program**
- **Activity**
Relationship Between GL & Sub-ledgers

GL contains the CoA designed by the institution

SL data such as expenditure types and orgs map to CoA segments
All UCLA systems consuming financial data from QDB must use new key data elements. For e.g. new Chart of Accounts.

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

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

Departmental and system owner outreach will occur through the end of the year.
UCLA Systems Impacted by Oracle Cloud

**Directly Impacted External Systems**

Systems that will interface with Oracle Cloud and other core financial systems implemented by the Ascend Project.

These systems will send and receive data from Oracle Cloud and very likely be impacted by new CoA and other configuration.

Examples: UCPath, BAR, Maximo - Facilities, CashNet, etc.

**Indirectly Impacted External Systems**

Systems that interface with Direct Impacted Systems and maybe impacted by new CoA and Configuration.

Examples: CASHCOR, and other specialized departmental systems, etc.

Future State Financial Ecosystem

New features offered by Oracle Cloud could meet departmental business needs and render some directly and indirectly impacted systems unnecessary in the future state.
HOW WILL I STAY INFORMED ABOUT 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 garnering 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

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**
How does Change Management support this community?

Change Management

- **Ascend Project Team**
  - town halls | roadshow | subject matter experts

- **Communication**
  - surveys | website | printed materials

- **Ascend Business Partner Experts**
  - process redesign | context | business needs

- **Training**
  - online | job aides | in-person support

- **Ascend Change Agents**
  - local influence | advocate change | direct feedback

UCLA
NEXT STEPS
Visit the Website: www.ascend.ucla.edu
Sign-up to be an Ascend Change Agent!

1. Visit [www.ascend.ucla.edu](http://www.ascend.ucla.edu)
2. Hover over ‘Change Network’
3. Click on ‘Change Agent’
4. Sign up!
Email ascend@ucla.edu