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# Ascend: Grant Team Status Update

October 2023

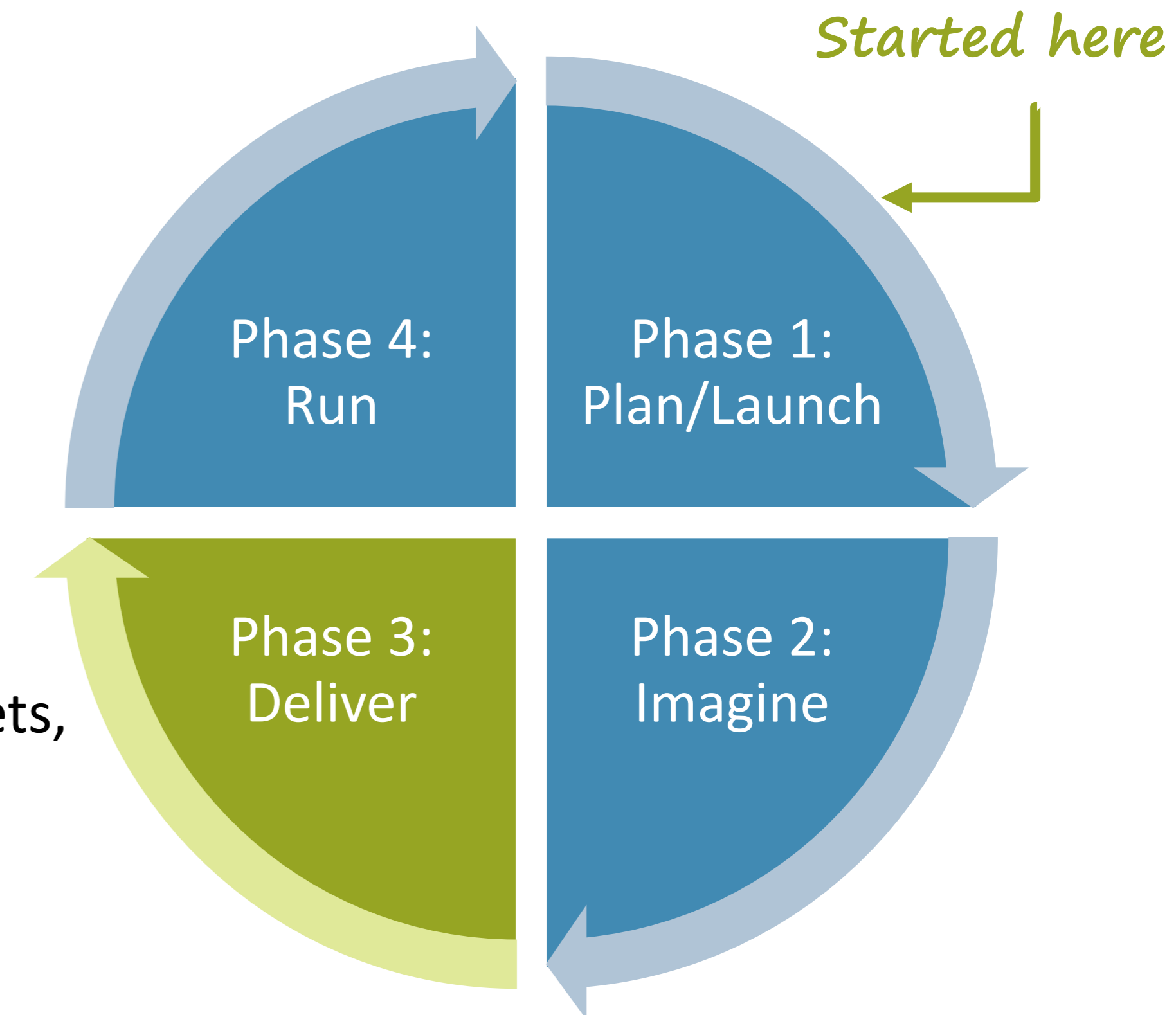
Katie Cadle

# Project Status: Grant Team

- The project is currently in the **Deliver** phase of the timeline
- **Activities for the Grant Team in this phase include:**
  - Testing of User Stories (Sprint cycles)
  - Creating Design Specification Documents (DSD) for Reports and Integrations
  - Loading and validating of conversion
  - Refining design decisions and business processes
  - Collaborating with other modules (e.g., General Ledger, Fixed Assets, Capital Projects, and Procure to Pay) regarding processes which require cross-collaboration
  - Participating in various committees and forums related to the Research Enterprise



**Additional information on the overall project timeline is in the [Ascend 2.0 Project Roadmap](#) on the Ascend website.**

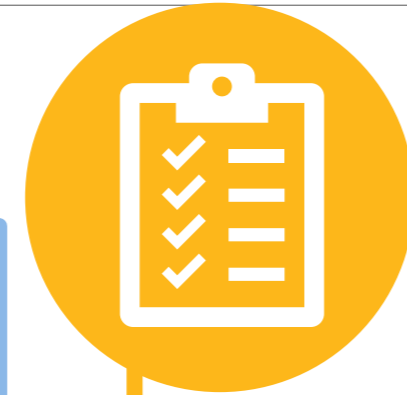


# Sprint Cycle Breakdown



## What are Sprint cycles?

- Repeatabe phases of the development cycle which **break down the development** into smaller, more manageable pieces
- Last approximately **six weeks** in length with **eight cycles** overall
- Includes **testing of User Stories** which are user requirements and testing of **reports and integrations**
- Cycles started **Spring 2023** and go through **Spring 2024**



## Sprint Highlights

- Sprint cycle four ends **Tuesday, October 17, 2023**
- Sprints **one – two** focus was **configuration User Stories**
- Sprint **three and four** focus expanded to include **central office report testing**
- **Configurations** tested in **Accounts Receivable Module** include **Managing Cash Receipts/Receivables, Cash/Receivables Adjustments, and Month End Close**
- **Configurations** tested in **PPM** include: **Award/Project Creation and Update, Month End Close**



## What is coming in the remaining in Sprint cycles?

- Transition to testing of **integrations and system builds** including **PATS, PAMS, and Project Cost Imports**
- Continued **central office report testing**
- **Testing of campus reports** designed in collaboration with **Research Reporting Sub-Committee**
- *Retesting as needed*

# Collaboration: Research Reporting Sub-Committee

- **The Research Reporting Subcommittee, within the Campus Reporting Workgroup, was established to ensure the Ascend 2.0 central Reporting Team develops reports that meet the Research community's needs.**
- **The Subcommittee is responsible for developing a list of reports needed for campus at go live, in collaboration with the Ascend 2.0 Financial Reporting and Business Analytics (FR&BA) and Grant Teams.**
- **Upon finalizing the list of reports the respective owning team oversees the creation of the Design Specification Documents (DSD) and development of the report.**
- **Collaboration between the Subcommittee and Grant team ensures:**
  - Reports include data relevant to campus users
  - Reports developed for campus users are consistent in look and feel
  - Creation of duplicate reports is avoided

# Design Specification Document (DSD) Breakdown



## What are Design Specification Documents (DSD)?

- Documents containing the functional and technical requirements for a report or integration
- Used as the source document for the technical team during development



## DSD Highlights: Reports

- Examples of reporting DSDs being created by the Grants Team for central office use:
  - Reports needed during the billing and reporting process including Pre-Bill reports, invoice and financial report templates for submission to sponsors, and Letter of Credit Reports.
  - Other management and Quality Assurance reports utilized by ORA

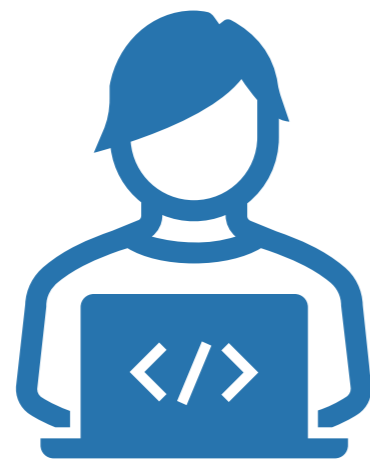


## DSD Highlight: Integrations & Conversions

- Examples of integration DSDs being created by the Grants Team:
  - Integrations from PATS for Award/Project creation and update
  - Integration from PAMS for Award/Project creation and update and fixed amount billing
  - Project Cost imports from boundary systems such as UCPath

# Sprint 1 – 4 Milestones

Beyond the functionalities covered in the demos, the Grants team has accomplished significant work during Sprints 1-4.



Wrapping up testing of Grants & Accounts Receivable system configuration user stories. Testing for all user stories will continue through sprint 8 (March ~ April 2024).



Research Conversion Design Specification Documents (DSDs) have been completed. DSD creation for integration in process and will continue through future sprints.



Alignment and collaboration with Financial Reporting and Business Analytics team completed for campus facing reports. Design Specification Documents (DSD) creation proceeding according to alignment for all Research related reports.

# Any Questions?

## Contact Information

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