

Effort Reporting System Management Group
Meeting Notes
September 7, 2005
Accepted October 12, 2005

In attendance were: Sue Abeles, Mike Allred, John Ellis, Joyce Freedman, Don Larson, Jorge Ohy, Pixie Ogren, Adam Cohen, and Jon Good.

Discussion Topics:

Review and Acceptance of August 10, 2005, Meeting Notes:

The meeting notes of August 10, 2005, were accepted without revision.

Jorge Ohy asked whether the San Francisco campus was considering UCOP hosting their ERS implementation. Joyce Freedman responded that Eric Vermillion needed to respond to this question.

Don Larson asked for the threshold number of campuses opting for UCOP hosting to make that option viable. Jon responded that managers at UCOP need to discuss what that number would be. The topic will be discussed with the Information Technology Leadership Council on September 20, to gauge interest among non-sponsoring campuses.

Project Status Update:

Adam Cohen remarked that the updated project schedule was on the web site and comments on the following activities:

- The principal programming work on the ERS user interface is complete.
- Programming on the system administration component is underway.
- The project team is actively working on deploying ERS in different technology environments and associated testing, as well as quality assurance testing

Pilot Preparations

Adam reported a couple of discussions have now taken place with pilot team at Davis. Pixie mentioned a September 2 deadline to have a plan together and submitted to Project Team for review for appropriate detail. Mike Allred noted that he doesn't believe that the Davis Pilot project manager, Radhika Prabhu, is working on a more detailed plan. Adam mentioned that looking at draft of late July there were some additional functional items that were going to be detailed on the pilot schedule. Pixie Ogren commented that more detail about the departments to be involved, and other function matters that are to be addressed in the pilot, would be helpful

elements in the plan. Pixie also suggested that a functional lead needs to be identified. Mike said that Kathy Haas is the functional lead but can't devote 100% time to the pilot process.

Jon asked whether the discussion is about documenting enough detail about the pilot schedule and associated details. Pixie commented that we're trying to get a sense that all aspects of the pilot are going to be covered. Mike suggested that if someone on the project team could help with documenting the particulars of the Davis pilot and report back to the Management Group perhaps that would clarify everyone's understanding. Adam will put together a conference call with the Davis folks and include Jon, Deb, and Pixie. Someone from the project team will document the understanding of the pilot.

Mike asked whether Pixie had specific items she thought were needed in a pilot. Pixie commented that the ERS Implementation Guide pretty much covered the topic, but she could prepare more specifics for the pilot and send those specifics along to Mike.

Mike mentioned that Deb Nikkel had met with the Davis user group, a formidable-sized group. In that meeting, a representative from the campus IT department had presented a description of what it took to educate their faculty about "grades online". In light of the description of "grades online" rollout, the campus work group had identified two location policy issues that need to be addressed soon. Since rollout of the cost commitment tracking system is underway, addressing local issues for ERS is being deferred for the moment.

Adam reported that discussion with UCLA about the pilot is continuing. Updated test data has been received. Sue mentioned that Rick Valdivia, the functional lead for the UCLA pilot, has been on vacation but should be back soon and will touch base with him on status. The UCLA Work Group has expanded to include departments with a high volume of PARs. The Work Group is expected to meet the 3rd week of September.

Adam pointed out that data for the quality assurance testing has been arriving from campuses.

Mike asked whether the project team is waiting on pre-QA data from Davis. Adam responded in the affirmative, though he's been in contact with Davis staff about the need for the QA data.

Adam remarked that QA test data has been received from UCLA and San Diego. Sue asked whether the Requirements Group would review the results of the QA testing. Adam responded that the project team will review with campuses individually and report results to the Requirements Group, which can elect to examine results in more detail, if desired.

Requirements Group Update

Jon reported that the Requirement Group had met via conference call on 8/11. The Committee heard reports on the 8/10 Management Group meeting, reviewed the Pre-Quality Assurance work plan, reviewed the Communications and Training Design document, observed a demonstration of the ERS (favorably received), and discussed two changes to the requirements. On this last topic, Jon pointed out that the Requirements Group feedback on the ERS demo had

brought out two issues that were perceived to be of relatively minor system significance but potentially viewed as negatives about the ERS when presented to campus users: inconsistent labeling of column headings on the effort report itself and the requirement that comments be entered on an effort report any time there is a change in effort report information. The Requirements Committee discussed making the headings consistent and limiting the requirement for the entry of comments to only those effort reports where changes to payroll information were entered. This sparked a discussion of how to set the scope of requirements changes at this stage in the development without revisiting major issues that have already been decided and keeping on schedule for the pilots and the February rollout. Subsequently, through email, this discussion took place and agreement was reached on the proposed requirements changes. The project team is planning to make these changes before the ERS software is made available to the pilot campuses.

Technical Advisory Group (TAG) Update

Adam reported that he had re-pollled campuses on technologies planned for deployment at each campus to facilitate QA testing and/or production rollout. There were no significant changes from what has been described in the past. All of the products involved at the different campuses have been brought together by the project team for QA testing purposes.

The ERS was demonstrated to the group and favorably received.

Sue asked whether QA testing would include testing with different browsers. Adam responded that project team had reviewed browser variations with the TAG a few months in preparation for addressing browser variations in the QA testing phase.

Feedback from Campus Work Group Meetings

Los Angeles – Sue reported that there had been no campus work group meeting in August. The next meeting is scheduled for September

Berkeley – John Ellis reported that he is working with a couple of different campus groups and hopes to have some plans in place by end of September. Communications with faculty have not yet taken place, though such communications are planned.

San Francisco – Joyce Freedman reported that no formal campus work group meetings have started at UCSF.

San Diego – Don reported that the campus work group had met the week before and discussed the intersection of cost sharing and ERS. Adam will visit the campus on September 12 to demonstrate the system to the work group. Don is looking for resources for communications and rollout activities. A plan is anticipated to be in place in October. After the plan is in place, work with friendly department staff and faculty will commence.

Other Business

White Paper – Jon asked whether there had been any feedback from Anne Broome or Larry Coleman on the White Paper. Sue responded that she had not yet heard back from either Anne or Larry.

Portlets Discussion – Jon mentioned that Sue had participated in a meeting of the Irvine, Los Angeles and San Diego campuses on the topic of business portals, where Bruce James from UCOP had made a presentation on portlets planned for UC For Yourself services. Sue had asked Jon offline whether the ERS was being designed with portlets in mind. Jon reported that the portlet solution that had been described was to allow a centrally hosted application (UC For Yourself) to be integrated in the campus portal context. ERS has been not been designed for portlet operation as the original vision was that campuses would host/operate ERS locally. If UCOP winds up hosting ERS for some campuses, and any of those campuses need to have ERS integrated into their portal, “customization” of the ERS code will be needed to make ERS function in as a portlet.

ERS Implementation Planning Guide – Jon asked for feedback on the Implementation Planning Guide that Pixie had produced. Everyone commented positively that the document was useful and appreciated Pixie sharing her experience with implementation planning. Jon added that he’s already shared the document with several people at UCOP working on other projects that involve rollout to large audiences and that these people have found the document helpful.

Next Meeting

The next meeting is scheduled for October 12, 2005 from 1:00 to 3:00. This meeting will be an in-person meeting (Conference Room 10325).