

Effort Reporting System Management Group
Meeting Notes
January 11, 2006
Accepted February 9, 2006

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

Discussion Topics:

Review and Acceptance of December 7, 2005, Meeting Notes:

The meeting notes of December 7, 2005, were accepted without revision.

Project Status Update:

Adam Cohen commented on the following:

- The project team continues working with the pilot campuses. (characterized later in the discussion) A lot of issues relating to the clarification of requirements and technical documentation have been raised and addressed. At this point issues reported from the pilots are being addressed as soon as they're reported. No issues have come up which has set back planned release date of February 6, 2006.
- Less than 10 items remain on the to-do list for Base ERS Release 1. Five of the remaining to-do's are internally-generated technical items that will make support of the base ERS easier. The remainder of the items are functional in nature.
- The Project Team will soon start planning on a release 2 to catch items from initial installation.

Pilot Status

Sue Abeles reported that the UCLA pilot is still in the training stage, and the training is going well. Some issues about the system have been uncovered and reported to the project team. Adam reported that one of the issues was a conflict of batch processing interfering with training, and that issues are being addressed as soon as they are reported.

Sue mentioned that that the UCLA pilot will begin in earnest in the next two weeks.

Mike reported essentially the same at the Davis. The campus is still focused on the rollout of the Effort and Cost Share Commitment Tracking system. The campus pilot team has received good support from the ERS project team. Davis hasn't progressed far in the pilot because of some technical issues related to payroll transactions: issues with School of Medicine and the School of Veterinary Medicine. Local pay processing changes are being put in place and the hope is to bring in pilot participants to actually use the system very soon.

Requirements Committee Update

Jon reported that the Requirements Committee had met in person on December 8. The Committee heard reports on the December 7 Management Group meeting, and reviewed most of the same topics. There was bit more in-depth discussion of training materials, but nothing of note to report about that discussion. As the topics for the Requirements Committee dwindle, monthly meetings will continue to be calendared, but meetings will be cancelled if there is a lack of agenda items.

Technical Advisory Group Update

Adam reported that the Technical Advisory Group did not meet in December. The group will meet in January to review the Installation and Operations Guide for structure.

Non-sponsor Campus Presentations Update

Jon reported that there was no news on this front. He will soon be scheduling a session with Santa Barbara and Santa Cruz to present the ERS Overview. As mentioned at the December 7 meeting, there were some questions about the views of Irvine and Riverside. Eric Vermillion reported that a review of the costs associated with buying into ERS is on the agenda for the next Budget and Planning Officers meeting on January 25th, and that Jon will present the cost information. **Eric asked Jon for the most up-to-date cost spreadsheet.**

UCOP Hosting Update

Jon mentioned that UCOP IR&C had decided to move forward with offering ERS Hosting for campuses. The initial offering will be at the 5-campus rate, even if fewer campuses sign up for the service. Review of the service will take place after a year or so to determine whether there are enough campuses subscribed to the service to justify its continuance. The announcement of this offering would be made to the IT Leadership Council on Thursday January 12.

John Ellis mentioned that Berkeley is willing to go ahead with UCOP hosting, pending seeing a service level agreement. Jon apologized for Berkeley not having received a draft service level agreement as had been discussed in a meeting with John and Berkeley IT representatives in December, and indicated that follow-up would happen soon.

Policy Update: Contracts and Grants Manual, Accounting Manual

Sue asked Jorge if anything more needed to be done to finalize the Contracts and Grants Manual and Accounting Manual changes. Jorge responded that one Academic Senate staff member had indicated that they wanted to provide a comment, but Jorge has not yet received that comment. He will wait for the comment and, if it doesn't arrive soon, finalize the changes.

Jorge also reported that he had received no responses from the Controllers regarding proposed changes to Corporate Account Fund Profile data element values. Jorge mentioned that Barbara Yoder in UCOP Research Administration had commented on a strong preference for a separate data element rather than added values to existing data elements. This preference avoids impacting existing reporting processes built on the Corporate Contracts and Grants System (CGX). Many commented that campus financial systems cannot easily accommodate the addition of a new data element. Pixie suggested that campuses might map the proposed new data element values back to existing values in the interfaces to UCOP as to avoid conflict with UCOP reporting. Jorge responded that it would eliminate uniform coding, but would address Barbara's issue.

It was agreed that everyone would talk with their respective campus IT people to see whether this “mapping” solution is a viable option. Jorge will follow-up with Barbara after getting feedback from the Management Group on the campus mapping option.

Campus Work Group Reports

(Note: Davis and Los Angeles reports appear in “Pilot Status”, above.)

Berkeley – John Ellis reported that an enlarged campus group had met in the last week. Nothing of substance worthy of reporting came out of the meeting. Nothing negative came up.

San Diego – Don Larson reported that UCSD is meeting every two weeks to work through various issues. A web survey is out trying to ascertain campus effort reporting practices involving the paper effort report, who is touching the reports, how many faculty are actually signing the reports, etc. Don added that UCSD is starting to look more seriously at the communication and training plan, and when the campus is going to implement the new ERS.

Davis - Mike Allred commented that faculty and deans are starting to believe that this has to happen. A lot less grouching than there was about 6 months ago.

San Francisco – Joyce Freedman–The UCSF email group hasn't had much activity. Eric commented that the primary focus has been on the rollout of their Peoplesoft Research Administration system (phase II).

Jon asked for anticipated production start dates/reporting periods using the new ERS. The responses:

Campus	Effort Reporting Period	Calendar Start	Notes
Los Angeles	Spring quarter 2006	Summer 2006	
Berkeley	Summer 2006	Fall 2006	
San Francisco	Not Yet Determined	Not Yet Determined	
Davis	Spring Quarter 2006 or Summer 2006	Summer 2006 or Fall 2006	Dependent on when PPS data issues can be resolved
San Diego	Not Yet Determined	Not Yet Determined	See discussion summary below

Don mentioned that UCSD is still examining the issues of moving to an annual effort reporting certification cycle with the objective of reducing workload. Moving to twice yearly certifications is a possibility if the annual cycle is not possible. A determination will be made in the next month or so. Don agreed to share the analysis with the Management Group.

Communications and Training

Pixie and Jon reported that training materials had been reviewed and the thirty modules Deb had prepared were now ready for formatting. Pixie has identified a vendor with experience assembling online training materials that can take the prepared training text and screen snapshots and assemble the final online training modules, including graphic presentation format. The cost of doing this is estimated to be about \$10,000. Taking this approach will expedite the delivery of the training materials. The Management Group agreed.

Pixie indicated that work with the vendor would start sometime the next week. Sue and Mike asked to see the text of the training materials for a review prior to the vendor work and agreed to provide comments by Tuesday January 17th.

Marketing of ERS

After a brief discussion of various expressions of interest in the ERS, it was agreed to table this discussion for a few months until the pilots are completed and implementation at the first campuses is well underway.

Next Meeting

The next meeting is scheduled for **Thursday February 9, 2006, from 10:00 to Noon**. Confirmation of an in-person meeting or conference call will be sent by end of day on Tuesday, January 31, 2006.