<u>**Notes from the 7-14 ERS Requirements Group Meeting**</u>

The newly expanded ERS Requirements Group met for the first time on July 14, and the input from academic department representatives was invaluable in addressing several issues. The group addressed the following topics:

<u>Multiple Certifications</u>
The group agreed that a significant number of effort reports will require more than one certification and it is not reasonable to expect Effort Report Coordinators to manage the process of obtaining multiple certifications without system assistance. The problems with multiple certifications occur for many reasons, but primarily because it is not possible for the system to determine how many certifications are required for each effort report nor is it possible for the system to determine who the certifiers should be. This is because for any given employee there are a number of people who could legitimately certify the effort. For example, Principal Investigators (PI's) can certify for anyone paid from their funds, other academics and staff supervisors can certify for any employee for whom they have first hand knowledge of the work performed, and employees can certify their own. PI's may have funds in more than one department, employees may be paid from multiple funds (with multiple PI's) and may work for more than one supervisor and in more than one department.

The group concluded that if each effort report contained a list of all fund sources--displayed in such a way that employees are accustomed to seeing fund source information for their campus--it would be reasonable to expect that each certifier could

Notes: Does the PAR contain the funding source in the FAU or other places. Then we would need a full list of fund #'s and descriptions so we could build that into the Effort report for that campus. So for each effort report we would have a list of the Fund sources for that effort report that would need certification, then a way to verify cert's for each active fund source and what ones are left to complete. So some form of status/state table that is carried with effort report to tell status of in process certification and what is left to do

be asked to check off a box indicating for which fund source they were certifying. It was generally felt that as long as the full name of the fund source was displayed along with the numbers that certifiers would be able to recognize and designate the appropriate fund sources to which their certification applied. The system could then simply monitor to verify that all boxes had been checked off. If boxes for some fund sources were not checked off, the system could determine which department those fund sources belonged to so that appropriate follow up could be done to ensure that the certification process was completed. Note : need a list of funds and the associated departments that lead that fund for signoff.(is it true that a fund has only one department assigned

to it ?) So we could point to either PI or department coordinator once we know department for the fund.
So we need Fund #, Long description of fund title, department #, department Coordinator name and email address, PI Name and email address, maybe all contained in a contract and grant database? Or we can build it as we go.

Routing of Notifications
The group began discussions about how notifications should be handled by ERS. Although there were interesting discussions, no conclusions were reached as to the actual system requirements. The concept that we are dealing with is different than most system solutions that we are accustomed to and it is important that the group members take the time to try to become comfortable with the concept. Not**ifications may require access to an email directory to construct email header info, etc** Several "straw model" proposals will be developed and vetted with the Requirements Group members. The discussion will be continued over the next few weeks with resolution expected by the end of our next meeting.

Future Meeting Schedules
We have tentatively scheduled workgroup meetings through the end of December. Members suggested that it would make the best use of their time if we were to extend the length of the meetings so that we can resolve more issues at each meeting. We have scheduled future meetings to run from 10:00 to 2:00. Future agenda items will include system presentation, system navigation, timing of notifications and continuation of discussions concerning routing of notifications. Other items will be added as we continue to refine requirements and provide additional detail.