

**Effort Reporting System
Requirements Group
Notes of the September 8, 2005 Meeting
Revised, Accepted.....**

Attendees: Greg Carr (UCB), Cynthia Kane (UCB), Amy Kimball (UCB), Rick Valdivia (UCLA), Dan Gilbreath (UCSD), James Ringo (UCD), Buck Marcussen (UCD), Erica Webber (UCSF), Pixie Ogren (UCLA), Jon Good (UCOP), Adam Cohen (UCOP), Wayne Kidd (UCOP), Jorge Ohy (UCOP)

The meeting was conducted via conference call.

Review of 8/11/2005 Meeting Notes

Notes of the August 11th meeting were approved without revision.

Follow-ups from Previous Meetings

Jon Good provided a report on the discussion from the September meeting of the Management Group.

The group discussed hosting of the ERS application at UCOP and considered the costs involved. Jon noted that the topic of ERS hosting would be discussed with the Information Technology Leadership Council on September 20, to gauge interest among non-sponsoring campuses.

At the Management Group meeting, Mike Allred 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 campus 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.

Jon reported that there was no further progress on the topic of new data elements in the Corporate Account Fund Profile (CAFP) since the last meeting.

Subsequent to the August meeting, the Requirements Group was polled via email on two proposed requirements revisions. The response was unanimous in the affirmative for both revisions. These are the two requirements changes that will be made:

- 1. Make the effort reporting column headers consistent by removing the word "Effort" from the "Payroll %" columns.*
- 2. Limit the requirement that comments be entered on the effort report to those cases where the "Payroll %" value has been changed on the effort report.*

Pre-Quality Assurance Review

Adam Cohen reported that the development team was nearly ready to begin the QA cycle using data and test cases provided by the campuses. Dan Gilbreath reported that he will be sending test cases for UCSD. Adam noted that data files had already been provided.

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Amy Kimball mentioned that UCB wants to have their test cases reviewed and will ask the Financial Systems group for refreshed files so that their cases can be run at UCOP.

Multi-campus Appointments

James Ringo described the “multi-campus appointments” issue where someone is paid from one campus but is working at another campus. This practice raised questions such as where should the effort report come from and where is the certification “office of record”.

Pixie Ogren responded that if an employee receives pay on federal funds from both campuses, they will get two effort reports. The employee would have to certify each report separately. If an employee is paid from their “home” campus but works at visiting campus, it could appear that nothing is charged to the federal funds.

The group felt that this issue could be dealt with as a policy matter or a training issue depending on the number of cases. Requirements Group members will survey their campuses to evaluate how many instances of this situation may exist.

Additional Discussion

Jon asked for feedback on the implementation planning guide. There were favorable comments and a number of campuses said that the document would be useful for their campus implementation efforts.

The group decided that a special conference call to discuss results of the QA will not be needed and that we can review results in general at the October meeting.

Next Meeting

The next meeting is scheduled for October 13, 2005. This will be a conference call from 1:00pm to 3:00pm.