Effort Reporting System
Requirements Group
Notes of the October 13, 2005 Meeting
Accepted November 10, 2005

Attendees: 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), Deb Nikkel (UCOP)

The meeting was conducted via conference call.

Review of 9/8/2005 Meeting Notes
Notes of the September 8th meeting were approved without revision.

Follow-ups from Previous Meetings
Jon Good provided a report on the discussion from the October meeting of the Management Group.

The Management Group discussed the question of employees with multi-campus appointments, the issue being which campus would be responsible for producing effort reports for these employees. A number of factors must be taken into consideration such as which site receives the federal funds and which funds are used for payments to the employee. Because of the variables involved in this situation, the Management Group felt that it would not be possible to design a solution into the Effort Reporting System and that these situations would have to be handled through training and procedural controls.

The Management Group considered the question of whether the system should enforce the requirement that faculty members and professional staff certify their own effort reports. Given the fact that there would need to be exceptions to this rule, that it would be difficult to manage the exception process, and that it may not be possible to consistently identify this type of user based on available payroll data, the decision was made to not attempt to enforce this at the system level.

In response to this item, the Requirements Group reiterated its position that there was a significant functional impact to removing this requirement from the system.

Pixie Ogren will attempt to develop a set of criteria that can be used to define which employees fall into this class.

Jon also reported that on the subject of data element revisions to the Corporate Account/Fund Profile, further discussions would be held with the Office of Research to determine whether that unit would assume "ownership" for a new data element in the corporate system.

ERS Roles and Capabilities
Adam Cohen reported that working with the pilot implementation groups at UCD and UCLA had raised a number of issues regarding authorization and approaches for integrating ERS with existing campus authorization systems. Some of these issues have

arisen from variations in terminology between the ERS design and existing systems. These differences have been highlighted with the review of communication and training materials being prepared for the pilot.

Adam Cohen proposed, and the group agreed, that a brief presentation on the subject of authorization would be useful and would be made at the next Requirements Group meeting.

Pre-Quality Assurance Testing – Update
Adam Cohen reported that while progress is being made on the QA testing phase, the team has not completed loading test databases with the campus data needed to produce the test cases. This work is expected to be completed by the end of October.

Communications and Training
Deb Nikkel reviewed the status of communications and training products. Communications products were posted to the ERS website for all phases, except the final implementation phase which is scheduled to be posted just prior to system release. Feedback on all four communications packets was requested. Rick indicated that he had reviewed the materials in detail and would forward comments to Deb. Then, Deb briefly reviewed the delivery dates for training products that were revised to reflect pilot campus schedules. Those materials will be developed primarily in Captivate. This Macromedia authorizing tool is SCORM and AICC compliant; and end products are easily portable to Breeze and other learning management systems such as WebCT and others used by campuses.

Next Meeting
The next meeting is scheduled for November 10, 2005. This will be an in-person meeting at UCOP in Oakland, 1111 Franklin conference room 9204.