Effort Reporting System
Requirements Group
Notes of the December 8, 2005 Meeting
Revised February 9, 2006   Accepted February 9 , 2006

Attendees: Amy Kimball (UCB), Gregg Carr (UCB), Rochelle Caballero (UCLA), Rick Valdivia (UCLA), Dan Gilbreath (UCSD), James Ringo (UCD), Buck Marcussen (UCD), Erica Webber (UCSF), Jorge Ohy (UCOP), Pixie Ogren (UCLA), Jon Good (UCOP), Adam Cohen (UCOP), Deb Nikkel (UCOP)

Review of 11/10/2005 Meeting Notes

Rick Valdivia commented that the UCLA Pilot status report needed to be corrected to indicate that no users have yet been involved in pilot testing. It was agreed to change the wording of the last sentence of the UCLA report (bottom of page 2) to read: "Users in general and Principal Investigators/Faculty have yet to be involved in the pilot."

With this change, the notes of the November 10th meeting were approved.

Follow-ups from Previous Meetings

Management Group Report

Jon Good provided a brief report on the topics covered by the Management Group that aren't otherwise on the agenda for the Requirements Committee:

- Discussions with several of the campus not currently participating in ERS have begun, with the purpose of getting those campuses involved in ERS down the road.
- Jorge Ohy has received feedback on the proposed revisions to the Contracts and Grants Manual and the Accounting Manual. Jorge and Sue Abeles will work together to consolidate the comments and responses to each comment.

Quality Assurance Testing – Update

Adam reported the following:

- 12 reporting periods (effort) at UCLA have been processed (non-academics – 4; 11-mo academics – 4; 9-month academic – 3; off-quarter – 1)
- 10 reporting periods at UCD have been processed
- The Project Team is currently analyzing the data and results of this processing and investigating anomalies
- San Diego data is starting to be processed– just today the Project Team received updated files to continue moving forward.
- Reports for individuals identified by the campuses for close scrutiny in the Quality Assurance process are being pulled together for review by respective

campus representatives. Review of effort calculations for these individuals will be important.

Buck asked if anyone was checking to see if individuals are not being excluded from effort reporting that should otherwise have an effort report generated. He suggested checking a campus data warehouse source to identify individuals who should get effort reports and then comparing with the population in ERS. Adam pointed out that the project team doesn't have access to the alternative data sources. Jon suggested that we ask pilot sites to retrieve appropriate counts from local sources and compare to what's being seen in the pilots.

Pilots – Update

Rick mentioned that the UCLA pilot team is working through a lot of data loading issues. UCLA is still working on getting four months of pay data loaded. Rick reported that actual user involvement in pilot testing most likely will not be begin until January.

James Ringo reported that the Davis data load has been completed. The Davis pilot team is currently reviewing the data that has been loaded into ERS, developing test scripts for the testers; and reporting anomalies to the Project Team. Some local data problems have been uncovered and some bugs have been reported to the Project Team.

Adam noted that three bugs have been reported by the Davis pilot team, all having to do with apparent inconsistencies in effort calculations: two of these appear to be related and have been confirmed as a problem in the ERS program code; the other remains to be investigated; A fourth report has been corrected in the base system and the fix will be included in a subsequent release.

Authorization Setup and Terminology

Following up on discussion at the previous meeting, Adam reported that the ability to distribute security administration setup is under development. This feature will allow departmental security administrators to give permissions for just a project, a department, or a fund within their scope of control. This feature will be ready for the February release.

Review of Bug and Enhancement Tracking

Adam reviewed the current list of bugs and enhancements that are being tracked by the Project Team. Items on the list have been generated by the Project Team as well as by members of pilot teams at Davis and Los Angeles. As new items come in, they are

triaged to assign priority and severity which guides the sequence in which items are to be addressed by the Project Team.

James asked about some the items logged for Davis, particularly item 272, "Payroll % not calculating correctly" and wondered how the priority and severity were set. Adam responded that the Project Team was assigning priority and severity.

Communications and Training

Deb Nikkel reported that a training data base has been created containing masked UCLA data (name and Employee IDs have been changed). Substantial text detail is being developed, beyond the simulations that were shown at the last meeting.

"Portals" for role-based training are being developed. Currently, work is focused on the Principal Investigators "portal".

There are thirty modules currently in development. Development is currently focused on content, with text being entered into Powerpoint. Once the Powerpoint has been edited and completed, the Powerpoint is imported into Captivate, where click boxes and other elements will be added. Simulations, such as those reviewed at the last meeting, are developed strictly within Captivate. Deb mentioned that, just yesterday, the Management Group had indicated it might be useful to have the Powerpoint materials available to pilot campuses for review of training materials during the pilot.

In response to a question from Deb, Buck reported that the ERS screens in the simulations appear smaller than before (example: the "Add a New Sponsor" module).

Rick commented that he recently obtained a larger monitor and where screen snaps were too large for the screen before, the screen snaps now within the bigger screen. Rick suggested planning on a screen resolution of 800x600 as the lowest common denominator of screen resolutions. Adam commented that ERS is being developed to the 800x600 screen resolution standard.

Next Meeting

It was pointed out that dates for meetings in 2006 had not been sent to Requirements Committee members. Jon will send out a list of dates in the next day or two.

Jorge Ohy pointed out that the Requirements Committee meetings have often conflicted with Controllers' meetings on the day after the Management Group meetings, and asked whether another day of the month could be found for Requirements Committee meetings.

After some discussion of possibilities, it was agreed to keep to the second Thursday of the month but to schedule conference calls for 1:00pm-3:00pm instead of 10:00am-noon.

The next meeting is scheduled for January 12, 2006 from 1:00pm-3:00pm. This will be conducted via conference call. Call-in number: 866-740-1260; passcode 9879193.