

**Effort Reporting System
Requirements Group
Notes of the April 12, 2007 Meeting
Accepted May 10, 2007**

The meeting was convened as a conference call. Attendees: Evelyn Balabis (UCLA), Connie Brown (UCLA), Maurice Taylor (UCLA), Cynthia Kane (UCB), Adam Cohen (UCB), Erica Webber (UCSF), Zoanne Nelson (UCSF), Buck Marcussen (UCD), James Ringo (UCD), Debra Henn (UCD), Mark Cooper (UCSD), Ashley Clipson (UCSD), Jorge Ohy (UCOP), Pixie Ogren (UCOP), Steve Hunter (UCOP), and Jon Good (UCOP)

Review of 3/8/2007 Meeting Notes

The March 8, 2007, meeting notes were accepted without revision.

Follow-ups from Previous Meetings

Management Group Report

Jon Good and Steve Hunter briefly reported the highlights of topics discussed by the Management Group at its 4/12/2007 meeting:

- Jon mentioned to the Management Group that discussion of Enhancement Request #515 was underway and that there were potential controls issues to be resolved. The Management Group requested a review of any recommendations by the Requirements Committee, when those recommendations are ready.
- Jon also mentioned to the Management Group the Requirements Committee participation protocol.
- Steve reported that Release 8, featuring Compliance Monitoring Reporting will be issued on April 13th.

Enhancements Requests Review

- #515– “Ability to group reports by PI project so that PI can certify groups of supervisee’s on a single sheet”

Continuing the last meetings discussion of the certification summary form, the following points were raised in discussion:

- Eliminating mouse clicks is important. Though it was suggested that the certification confirmation message and associated mouse click be moved to just after the login as acknowledgement of any certification mouse click later in the session, and eliminate the message/mouse click when certifying each effort report. This was thought to present a general user interface problem and associated controls problem by not having this “are you sure?” type of prompt in place.

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- Based on the recommendations contained in the White Paper, all faculty and professional staff are supposed to certify their own effort. If that approach is used, the number of Effort Reports that a PI would need to certify is greatly reduced. It was pointed out that the manner in which some research programs are set up, there will always be some employees who aren't necessarily aware of what projects they're working on (e.g., lab staff) and whose reports will need to be certified either by a PI or by a supervisor or lab manager.
- There is a need to understand the distribution of the numbers of effort reports individual PIs must certify across the population of PIs. That is, how many PIs must certify 10 effort reports, 20 effort reports, 30 effort reports, etc. UCSF has already come up with the distribution and found a very small number of PIs needing to certify more than 30 effort reports.

As a first step towards addressing this issue, it was proposed that the navigation among effort reports from within an effort report list be changed as follows:

1. Select an effort report from the list of reports (e.g., MyProjects).
2. Certify the effort report by clicking on the "Certify" button.
3. The "are you sure?" prompt will appear.
4. Click on "Yes" to confirm the certification.
5. The next uncertified effort report from the list of reports is displayed.

This is different from current behavior which redisplay the updated effort report from steps 1-4, above, with the indication that the effort report has been certified. The current behavior requires the user to explicitly click the "Next Effort Report" button to navigate to the next report, whether the next effort report is certified or not.

It was generally agreed that this approach eliminates mouse clicks and preserves the controls of the current effort report certification process built into ERS, and should be pursued further. The next steps in this discussion:

1. Document the approach to eliminate requirement to click on NEXT after certifying an ER in a list
2. Look at numbers at each campus – Steve will pull together for UCSD and UCB the count of effort reports associated with a PIs projects (by PI) and will provide the query statements to do the same at campuses hosting their own instances of the ERS. A sample copy of the distribution report prepared by UCSF will also be shared. UCB, UCD, UCLA UCSD will prepare their distribution reports and submit to Steve and Jon. Jon will consolidate and report the results to the group.
3. Discuss the proposed approach and numbers further via email
4. On agreement to pursue this change (and endorsement from the Management Group), move forward and make the enhancement, then revisit the value of the enhancement after 6 months in production

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5. Research audit and other issues related to a contiguous display of multiple effort reports on a single web page...similar to what was originally proposed by UCSD.

- #990 – “Sorting options for effort report list”

Davis has requested that an option be provided on the effort report itself to change the sort sequence to “by fund” if so desired. A sort on fund would enable the Davis campus to bring together salary and cost shared effort at the same place on the report. James Ringo will follow-up on this request by preparing a mock-up and soliciting comments from the group.

- #991 – “Add home department to effort report list”

#991 – Davis has requested that the employee’s home department (name) be added as a display attribute associated with each entry on the effort report list. The report list should be sortable by this home department name. The rationale for this enhancement is that some of the PIs are seeing the names of people on their lists that they don’t recognize and this will help to clarify those situations. James will prepare a mock-up for the Requirements Committee to discuss further. Steve/Jon will provide the text of this item from bugzilla along with mockup.

Implementation Status

San Diego – Ashley Clipson reported that San Diego still is in the process of testing and is working through some issues with Work Study payments. San Diego is planning on going live with six departments in June.

Berkeley – Cynthia Kane reported that Berkeley is testing with a small number of users in a couple of depts. The current plan is to pilot with the two colleges (Public Health and Engineering) and four smaller depts. The pilot is planned to start in May/June, will be for the 3rd quarter (Jan-Mar) and will not include faculty.

Los Angeles – Connie Brown reported that Los Angeles has completed testing Release 7.4 in preparation for production with summer and fall quarters. Some issues have been identified and these will be reviewed with UCLA AIS this afternoon.

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San Francisco – Zoanne Nelson reported that San Francisco is going live April 16th for academic and staff reporting for the period ending December 31st.

Davis – Debra Henn reported that, as of the 2nd week in March, Davis is in campuswide release of ERS. 10% of the effort reports have been certified. The Davis team is going around to departments to provide training that supplements the online training.

Next Meeting

The next meeting is scheduled for **Thursday, May 10, 2007** This meeting will be a conference call from 1:00pm-3:00pm.