

**Effort Reporting System
Requirements Group
Notes of the June 14, 2007 Meeting
Accepted July 12, 2007**

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

Review of 5/10/2007 Meeting Notes

James Ringo clarified that the Davis Implementation Status report (p.2) and asked that the statement "...anticipates 100% completion by around May 16" be changed to "...has a goal of 100% completion by around May 16." With this change, the meeting notes were approved.

Follow-ups from Previous Meetings

Management Group Report

The Management Group met via conference call on 6/13/2007.

Jon Good and Steve Hunter reported the following information about Base ERS releases:

Two additional releases are currently planned:

- Release 8.1 is on target for release on June 29. The highlight enhancement for this release is support for multiple co-PIs, in addition to several bug fixes in the late pay process and minor enhancements. Release 8.1 will require a change to the Financial System Interface file feed to include multiple co-PIs.

- Release 8.2 is planned for release in the late July/early August timeframe. The highlight enhancement for this release is the implementation of weighting 11/12 pay in mixed pay scenarios, which will facilitate combination of summer pay into a regular reporting cycle. As the opportunity arises, bug fixes and minor enhancements will be included in this release.

Also, patches and bug fixes have been issued on a regular basis. Information about these minor releases is available on the "Maintenance and Support" web page at: http://www.ucop.edu/sysdev1/ers/ers_MandS.html under the "Changes" link for affected releases.

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Following Release 8.2, it is hoped that a less frequent release schedule, such as quarterly, can be established and that Base ERS support will be limited to the two most recent significant releases. Intervening releases would be limited to only the most urgent of fixes to correct problems that have a significant negative impact on users; compromise system integrity; prevent the system from functioning at all or implement changes necessary to fulfill external or UC requirements with a University-wide mandated implementation date occurring before the next scheduled release. The Technical Advisory Group will be discussing a proposed schedule for periodic releases, to make sure that there is consistency with campus operations schedules. The Requirements Committee's discussion of Functional Enhancement Requests and associated priorities, later on the agenda, will help considerably with release planning.

Rochelle asked whether training modules are impacted by releases and whether changes to the modules are made as part of the releases. Jon responded that since late 2006, the Base ERS Team is no longer supporting the training modules since campuses were making extensive local modifications. Releases do have the potential to impact the training modules.

The Management Group also had an update on non-sponsor campus plans for adopting ERS, in response to a letter from Anne Broome to campus Controllers on this subject:

- Irvine – no response yet
- Riverside – no response yet
- Santa Barbara – no response yet (unofficially, Santa Barbara would like to go live in January 2008)
- Santa Cruz – responded that implementation is planned for FY 2008-2009.

The Management Group is also working on a statement concerning “consequences” for not certifying in a timely manner. This most likely will be finalized in the next month or so.

Summary Report for Certification of Multiple Effort Report – (this is Enhancement Request # 1012, previously referenced as #515). The Management Group was updated on the conclusions from the May 10th Requirements Committee con call on this topic, specifically that because of control issues, it was agreed to alter navigation to reduce mouse clicks and make the process somewhat easier than with the current navigation. Jon reported that he'd seen raw numbers from all but UCLA. Once UCLA has provided numbers, he will present a summary to the committee.

Implementation Status

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- San Francisco – Erica Webber reported that San Francisco completed the first cycle on May 25th. On deadline 82% of 5,500 effort reports had been certified. The following week San Francisco opened up the next cycle (staff quarterly for winter) to resume regular reporting schedule. Generally, things are going well. A couple of issues have come up and enhancement requests are being prepared for submission.

- San Diego – Ashley Clipson reported that San Diego will be going live June 21st with 6 departments (approximately 1,000 effort reports). Currently running about 2-1/2 weeks behind schedule. UCSD's single sign-on is now working with ERS.

- Berkeley – Cynthia Kane reported that Berkeley has delayed going live due to a variety of issues that are being worked out. Berkeley will likely begin its pilot in August. A new date for rollout has yet to be determined; discussion of the pros and cons of starting with the summer quarter is underway as part of the process of determining a new start date.

- Los Angeles – Maurice Taylor reported that Los Angeles has started three cycles in parallel: Summer 2006, Fall 2006, and Winter 2007. The deadline to complete all three cycles is June 30th. Four workshop sessions over the past two weeks to get a sense of issues and problems that folks are having.

- Davis – Debra Henn reported that Davis achieved 93% certification for the July-December 2006 cycle that just ended. Davis upgrade next week to Release 8 but will not be doling out access to compliance reporting just yet.

Enhancements Requests Review

The purpose of a more detailed enhancements requests review is to make sure that everyone understands each request and to determine the relative priority of the outstanding requests so that future release planning can take place. Steve, Pixie, and Jon had reviewed each of the requests and slotted them as either Functional or Technical Enhancement Requests, or Bugs, and came up with a preliminary prioritization of those items. The discussion focused on the Functional Enhancement Requests. The amount of work required to implement a request was not a factor in determining prioritization, but rather the focus was on the merits of the requests and the priorities were set accordingly.

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Next Meeting

The next meeting is scheduled for **Thursday, July 12, 2007** This meeting will be a conference call from 1:00pm-3:00pm.