

**Effort Reporting System
Requirements Group
Notes of the July 12, 2007 Meeting
Accepted August 9, 2007**

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

Introductions

Guy Stocks is replacing Rochelle Caballero on an interim basis. Rochelle retired in June and will be returning to the committee in a couple of months.

Review of 6/14/2007 Meeting Notes

Jon Good mentioned that discussions on enhancements requests would now be recorded in Bugzilla, rather than in meeting notes. Discussions and conclusions on enhancement requests from the June 14, 2007 meeting were the first to be recorded in Bugzilla.

The June 14, 2007, meeting notes were accepted without revision.

Follow-ups from Previous Meetings

Management Group Report

The Management Group conference call of 7/11/2007 was cancelled.

UCLA had just provided numbers on PIs with multiple effort reports to certify. Jon will collate with numbers from the other campuses and distribute the results to the Requirements Committee.

Project Status

- Steve Hunter reported that Release 8.1 is scheduled for release the week of July 16th. Work on this release had been interrupted by some priority bug fixes.

Implementation Status

- San Francisco – Erica Webber reported that at San Francisco everything is going along fine; currently in the “chase down delinquent reports” phase. Looking forward to implementing Release 8.1. At the recent deadline for Winter 2007, 72% of effort reports had been certified for the cycle. The number for the Fall

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2006 cycle now stands at 91%. The day after the deadline, an email was sent to all Effort Reporting Coordinators who have late reports on their lists asking for completion within two weeks with the added incentive that escalation will occur if not completed as requested. After two weeks, notice will be sent out to control points (Dean's offices, etc.) requesting help getting delinquents effort reports completed. After that, it's a one by one contact. In the attempt to collect the late effort reports, department heads ask the question: "what happens when they refuse". The "consequences" document that the Management Group is preparing would be useful to see to help formulate responses to this question. Jon will arrange to get the draft "consequences" document to the Committee.

- Los Angeles – Connie Brown reported that the deadline for the concurrent Fall, Winter, and Spring reporting cycles has been extended from June 30 to July 27. So far about 40% of the effort reports have been completed. UCLA hasn't yet pushed/escalated for completion. Evelyn Balabis mentioned that they have been working with high-volume departments and control points to encourage timely completion of effort reporting and have held "open house" meetings to talk through issues.
- Davis– Buck Marcussen reported that at Davis a lot of work takes place finding people and getting them to complete the effort reports, much the same as with the paper process. James Ringo and Debra Henn reported that Davis is 96% certified for its first cycle. Currently further work has come to a halt because of problems with late pay processing; currently awaiting Base ERS fixes related to late pay. The next reporting cycle at Davis will begin in November for January-September timeframe.
- San Diego – Ashley Clipson reported that San Diego went live 2-1/2 weeks ago with a population accounting for 20% of all effort reports in the January-March 2007 quarter. So far, 12% of the effort reports have been certified. Inquiries from departments still using the paper effort reports have come in wanting to know when they can cut over to the ERS. The target for the next quarter with ERS is a population accounting for 50% of all effort reports, then 80% the following quarter, and then 100% in the quarter after that.
- Berkeley – Cynthia Kane reported that Berkeley has a new project lead dedicated to moving the implementation forward. Department research administrators met to discuss the timing/phasing of implementation. Good feedback was received in this session. Also, concern was raised about being better prepared for the rollout, and possibly delaying rollout to achieve more comfort with preparations. There will be follow-on meetings with individuals to better understand the concerns about rollout preparations. One known concern is that of moving from centralized to decentralized administration, which may potentially impact department

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workload. Everything else at Berkeley is decentralized. Over the last year there's been more pushback from departments because of decentralized workload.

Enhancements Requests Review

Pixie Ogren mentioned that on the June 14th conference call, in the discussion of Enhancement Request 1022 – “Define column headings on Payroll Details”, she'd asked for campus to articulate preferences for labels but has not heard from anyone. Pixie asked once again for campuses to contact her with their preferences.

The following Enhancement Requests/Bug Reports were discussed (see Bugzilla for summary of discussions/conclusions on each of these items):

- 672
- 916
- 1125
- 1128
- 1141 (new to Bugzilla as a result of Requirements Committee discussion)
- 1142 (new to Bugzilla as a result of Requirements Committee discussion)

Jon mentioned that plans to further examine the priorities of Functional Enhancement Requests based on the magnitude of work associated with each request have been shelved for the simple reason that there is no magnitude of work differentiation among those requests. Thus, there is no need for further discussion of prioritization except as new enhancement requests come up.

Jon recommended and the Committee agreed that bug reports be given highest priority and that functional enhancement requests be addressed after bug reports. (This is with the understanding that where synergies exist to address combinations of bug reports and functional enhancement requests, enhancement requests may be worked on ahead of outstanding bug reports.)

In response to an inquiry from Debra, the Project Team will put together a work plan to show approximately when bug reports and functional enhancements will be addressed.

Ashley asked how to deal with effort reports where an individual is paid under a project before the personnel agreement comes in (sometimes as long as four months after work begins – cost transfers are done only once the personnel agreement has been processed) and the effort is “below the line” on the effort report. The recommendation is to put a note in the effort report about the real effort expended.

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Debra mentioned that Davis has a need for a mapping of ERS data elements to the assigned by the campus. Steve responded that he would start putting together this mapping.

Next Meeting

The next meeting is scheduled for **Thursday, August 9, 2007** This meeting will be a conference call from 1:00pm-3:00pm.