

**Effort Reporting System
Requirements Group
Notes of the November 15, 2007 Meeting
Accepted January 10, 2007**

The meeting was convened as a conference call. Attendees: James Ringo (UCD), Debra Henn (UCD), Buck Marcussen (UCD), Connie Brown (UCLA), Guy Stocks (UCLA), Connie Feeley (UCSB), Mark Cooper (UCSD), Ashley Clipson (UCSD), Bronwen Halacy (UCSD), Pixie Ogren (UCOP), Steve Hunter (UCOP), and Jon Good (UCOP)

Introductions

Bronwen Halacy, ERS Training Specialist, UCSD.

Review of 10/10/2007 Meeting Notes

The October 10, 2007, meeting notes were accepted the clarification of the UCLA status report to read “Maurice Taylor reported that testing w/Release 8.1 is wrapping up and there have been *no* issues to report.”

Follow-ups from Previous Meetings

Management Group Report

Jon Good reviewed highlights of the Management Group meeting of 11/14/2007:

- The consequences statement is being sent to Larry Coleman and Anne Broome for coordination with Vice Chancellors for Research, Controllers, and Academic Council for adoption in policy.
- Had an initial discussion about possibly revising the policy statement on timing (45/30) requirements for completion of effort report certifications. Discussion will take place in January 2008.

User Group Status

Ashley Clipson reported that there were 25 attendees (some people could not attend because of a conflict with NCURA). There was a good exchange of knowledge. More use of the ERS Users Group was encouraged. Some of the discussion topics:

- 45/30 timing – most campuses feeling this was an unreasonable time constraint
- training issues – one action item was for campuses to share their training materials using the Users Group web page
- consequences statement– everyone is looking forward to the statement being incorporated in policy so it can be used

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- integration of local cost sharing tracking systems
- UCLA and UCSD have been operating under the constraint that academics have to be approved by academics (e.g., non-academic PI overseeing a graduate researcher considered an academic). This constraint does not exist at other campuses. UCLA and UCSD are exploring this further.

Participants in the Users Group generally agreed that it was worthwhile to hold another Users Group meeting next year.

Project Status

Steve Hunter reported on releases:

- Release 8.2 was released on October 16th.
- Release 9.0 is still planned for December 2007.

Implementation Status

Pixie asked that campus status reports include a description of when late pay would be processed into ERS and how often.

- Los Angeles – Connie Brown reported that UCLA is in the process of implementing Release 8.1. Spring and Summer 2007 quarters will start next week. UCLA will probably give more than 30 days for completion of certification given that two cycles are being run concurrently.

Late Pay: Connie responded that UCLA will run Late Pay into ERS three times a month (2 biweekly and one monthly pay cycles).

- Davis – Debra Henn reported that Davis is getting ready for the next cycle which covers January-September 2007. Reports will be sent out next week. A backlog of 5 months of late pay has finally been processed and resulted in approximately 400 effort reports requiring recertification. Completion rate dropped to about 90% as a result, but has since climbed back up to about 93% Davis will likely skip installing release 8.2 and go straight to release 9 for the next cycle.

Late Pay: Debra reported that Davis will be running late pay into ERS once a month. During non-certification periods, monthly status reports of non-certified effort reports will be produced.

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- San Diego – Bronwen Halacy reported that San Diego has gone live for the April-June 2007 quarter. 83% of January-March 2007 effort reports have been certified. 28 departments have been trained in preparation for the next cycle.

Late Pay: Ashley responded that late pay processing is planned to run once a month.

- Santa Barbara - Connie Feeley reported that UCSB is still in the early stages and is pursuing campus-specific work to pull the financial system interface file together. UCOP will be visiting Santa Barbara on November 28th to review the ERS and address functional and technical questions about the system.
- Berkeley – (Cynthia Kane via email) – Berkeley is loading data tonight to run reports tomorrow for the pilot (Phase I) with 6 campus units beginning on Monday, November 26 . Implementation is still on track for February 15, 2008 for Fall Semester and Second Quarter 2008.
- San Francisco – No Report

Enhancements Requests Review

- #938 – User role notifications flag should default to Y
After a brief discussion, Pixie will work with Steve to better understand the administration mechanism and then work with Ashley to articulate a clear statement of requirements before bringing that statement to the entire Requirements Committee.

Other Topics

Debra reported that one of the members of the UCD functional users group had objected to the following behavior: when an effort report is designated as requiring multiple certification, is then certified by more than one certifier, and subsequently reissued because of late pay transactions, all lines on the reissued effort report need to be re-certified, not just the lines that were impacted by the late pay transactions. The suggestion was made that if any lines on the reissued effort report matched lines on the original certified report, the certification information of those lines should be carried forward to the reissued effort reports so that previously certified lines with no changes would not need to be certified again. Pixie suggested that any reissued effort report should be

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reviewed by all certifiers, since the effort report is intended to certify an individual's total effort and should not be viewed simply as a collection of independent pieces. The idea of carrying forward certification of individual lines was discussed at some length, with no resolution. Pixie suggested the issue be referred to the Management Group for their decision. Ashley will submit an enhancement request for this item and elaborate on the requirement and facilitate further discussion within the Requirements Committee.

Next Meeting

It was agreed to cancel the December 2007 meeting and to convene via conference call in January 2008.

2008 Meeting Dates (all are Thursday's; meeting time is 1-3pm):

January 10
February 14
March 13
April 10
May 8
June 12
July 10
August 14
September 11
October 9
November 13
December (no meeting scheduled)

The next meeting is scheduled for **Thursday, January 10, 2008** This meeting will be a conference call from 1:00pm-3:00pm.