

Effort Reporting System
Technical Advisory Group
Notes of the November 2, 2004 Meeting
~~DRAFT~~—11/4/2004 Accepted 11/16/04

Attendees: Jon Good (UCOP), Adam Cohen (UCOP), Wayne Kidd (UCOP), Terry Truax (UCOP), Kelly Haberer (UCB), Renata Ellis (UCB), Rick Espinosa (UCSD), Judith Freed (UCLA), Mabel Lai (UCLA)

The meeting was conducted via conference call. Notes from the 10/19 meeting were reviewed and no changes were noted.

Project Overview/Update

Adam reported that significant progress has been made in the area of interfaces to PPS and campus financial systems. The database design work is well underway.

The recruitment for the graphic design/user interface designer is underway and several candidates have already been interviewed. Contractor expected to be in place the week of November 15th.

Their first deliverable for the user interface designer will be to produce mockups of the external design for review by the TAG and Requirements groups.

Open Items from Previous Meeting

- Campus representatives reported on how their systems handle use by users who are not employees. UCSD, UCB and UCLA all support user access for people that are not employees. In all cases an identifier is generated, sometimes a generic ID and sometimes a pseudo-employee ID is used. We will continue to evaluate how to support affiliated users within the ERS.
- Following up on the last TAG meeting, Wayne presented our design approach to satisfy audit trail requirements. [Note: Slides of this presentation are available on the ERS project website: http://www.ucop.edu/sysdev1/ers/ers_docs.html] This approach includes effort report **versioning**, which will provide a complete record of every change made to every effort report, as well as a mechanism for **logging** view (read-only) access to effort reports.
- Feedback was positive for the versioning approach and there was agreement that this will more than satisfy audit trail requirements. Concern was expressed that the logging mechanism may generate significant volumes of data. The development team will evaluate this concern as we move forward.
- Jon pointed out that requirements have been evolving regarding change tracking and that tracking of read-only access may not be as strong of a need. The question was posed as to what campuses are doing for other web based systems. There was no indication that the technique of logging read-only accesses was in widespread use.

Effort Reporting System
Technical Advisory Group
Notes of the October 19, 2004 Meeting
DRAFT – 10/26/2004

- A question was posed as to what volume of effort reports are campuses generating right now and what might be anticipated for ERS. Berkeley reported that their current A21/PAR system is run seven times per year and produces approximately 15,000 individual PARs. No other campus information was immediately available. The design team will investigate estimates of data volume at other campuses to help with the the database design.

New Issues

Adam reported that the development team has been generating a number of technical issues that require feedback. Some are detailed and some are broader “approach” issues.

As an example of this kind of issue, Adam asked the group what type of operational model would work best at the individual campuses: centralized, with the system operated by production control or central office, or distributed, with the system operated by a departmental administrator or campus effort reporting coordinator, or some combination. In general, campuses indicated that they expected central office involvement to be required. We will revisit this again in the context of specific system functions and operational tasks.

Adam said that future issues of this sort would be posted to a discussion list website and invited campus representatives to provide feedback on specific issues through this medium.

Schedule of Meetings for 2005

The group discussed and agreed to change the meeting schedule for 2005 to a monthly basis. The TAG meetings will be scheduled for the third Tuesday of each month, January through June. Meetings will continue to be held by conference call, unless otherwise necessary, from 2-4pm. Adam will schedule the conference calls and distribute details to the group.

Next Meeting

The next ERS TAG meeting will be Tuesday November 16, 2004 2-4pm, via conference call. ERS team will publish agenda and other materials via project website and will announce availability in advance of November meeting.