Effort Reporting System
Technical Advisory Group
Notes of the December 7, 2004 Meeting
DRAFT – 12/7/2004

Attendees: Jon Good (UCOP), Adam Cohen (UCOP), Wayne Kidd (UCOP), Terry Truax (UCOP), Don Rutherford (UCB), Lyle Kafader (UCSD), Judith Freed (UCLA), Mabel Lai (UCLA), Beatrice Cardona (UCSF), Ed Martinek (UCSF), Larry Johnson (UCD)

The meeting was conducted via conference call. Notes from the 11/16 meeting were reviewed and no changes were noted.

Project Status Update

Adam reported that significant progress has been made on the database design and a full data model is nearly complete. The interface file specifications presented at this meeting are a result of the data modeling work that has been completed. The data model has been implemented at UCOP on the Sybase DBMS for testing purposes.

The web application design has begun and a preliminary prototype will be reviewed with the Requirements and Management groups at meetings this week.

Many functional areas of the application have been defined and although a number of points still require analysis and design, the development phase of the project is expected to begin after the holiday break.

[Note: the project schedule has been revised and updated and is available on the home page of the project website: http://www.ucop.edu/sysdev1/ers/ers_docs.html.]

Production Data Access

Following up on the request posted to the TAG discussion list in late November, Adam requested campus approval to access production payroll data for analysis and testing. Specifically, PPS PAR files were requested from more than one campus. Representatives from the campuses agreed to seek approval from their campus payroll manager. Once approval is received, the ERS team will work directly with UCOP operations staff to gain access to the necessary files.

Design Review – ERS Interface Specification

Adam reviewed the specification for the file formats for the interface files that will feed into ERS. The main file from PPS will be produced using a Base Payroll program. Campuses were asked to consider how they will gather the data that is called for on the other three interface files and to evaluate when test interface files could be provided to the development team at UCOP.

A number of clarifications on specific fields were provided, and several requests for additional fields were accepted for inclusion.

Campuses will provide any final feedback on the interface file formats on or before the January TAG meeting. At that meeting we will finalize the target date for delivery of test interface files from the campuses. This date will likely be near the end of January.

Design Review – Web Application Design

Eli presented the prototype of the web application and highlighted a number of user interface features. Model screens are available for effort report search results list, and the individual effort report view/edit page. Eli reported that the prototype will have additional model pages added over the coming weeks to include a search criteria entry page and a payroll detail drill-down page. Eli then demonstrated the concept of "skinning" by showing the same model pages with campus-specific graphics and styles applied.

Other Discussion Items

Adam reported that the team is ready to test implementing the database on an Oracle system and requested that one of the campuses provide a development environment for this purpose. Lyle agreed to host the development database at UCSD. Adam will provide user information so that database accounts can be established.

Next Meeting

The next ERS TAG meeting will be Tuesday January 18, 2004 2-4pm, via conference call. The ERS team will publish agenda and other materials via project website and will announce availability and confirm conference call details in advance of the meeting.