

**Effort Reporting System**  
Technical Advisory Group  
Notes of the February 15, 2005 Meeting  
DRAFT – 2/18/2005  
Accepted – 3/15/2005

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

The meeting was conducted via conference call. Notes from the 1/18 meeting were reviewed and no changes were noted.

### **Project Status Update**

Adam reported that the database design has been finalized and while adjustments are expected over the course of the development phase of the project, the basic structure is ready for review. Specifications for most of the batch processing parts of ERS have been completed. Additional design work for the web user interface remains to be done.

[Note: the project schedule has been revised and updated and is available on the home page of the project website.]

### **Review of Database Design**

The data model and database design was presented for review. The group walked through the major entities and relations in the data model. Questions related to sizing the database were raised and campuses expressed interest in getting a projection of space requirements for the system. **The development team will publish a “sizing guide” to help campuses with this planning step once the campus test interface files are received and are loaded.** No major issues were noted with the database design as presented.

The database design review led to a discussion of how the campus interface files would be processed. Adam said that the expectation was that the interface flatfiles would be loaded into the database through a DBMS-specific data loading utility such as SQL\*Loader or BCP.

Jon commented that the interface file format should include an audit mechanism, such as a header record, to allow the application to verify the contents of the file for consistency and completeness. This will preclude the use of a data loading utility and will require that the interface files be loaded by a batch program that can interpret the proposed header record. **The development team will revise the design of the interface file processing module to address this issue.**

### **Review of Development Workbench**

A document describing the software tools that will be used for the ERS development phase was reviewed. This tool set also includes some of the software that will be

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required to operate ERS in production mode. **The design team will publish a revised version of this document that distinguishes the development environment from the operational environment in terms of the required software products and versions.**

Related to this discussion, UCLA requested that a specification for browser standards be published so that campuses can plan ahead to make sure that ERS users are prepared with the proper version of browser to use the application. UCLA reported specific problems with Mac OS9 users that were encountered during implementation of the Web PAN project. UCSD reported encountering some compatibility issues with Javascript applications and is trying to avoid Javascript.

Adam responded that although some basic information was specified in the ERS Requirements Document, **the development team would publish a standalone document that details minimum browser requirements and functionality for the ERS application.**

#### **Preparation for a Pilot Test**

Adam related interest expressed by the Management Group to include a pilot test as part of the project plan. The pilot test would involve a campus and one or more departments who would use the new ERS in production mode to help validate system operation and the new generated effort reports.

The group discussed the requirements for a pilot test and the resources required to conduct this test. UCLA responded that while they were interested in participating in a pilot test, that work would need to be done to prepare the environment and identify a suitable user department. **The development team will prepare and share a more detailed pilot test plan with the TAG at a future meeting.**

#### **Next Meeting**

The next ERS TAG meeting will be Tuesday March 15, 2005 from 2-4pm, and will be conducted 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.