Effort Reporting System
Technical Advisory Group
Notes of the April 19, 2005 Meeting
DRAFT – 5/13/2005 Revised and Accepted – 5/17/2005

Attendees: Adam Cohen (UCOP), Wayne Kidd (UCOP), Abdulla Jehaberdeen (UCOP), Eli Cochran (UCOP), Gary Thackeray (UCB), Sungsoo Yang (UCB), Lyle Kafader (UCSD), Mabel Lai (UCLA), Larry Johnson (UCD), Beatrice Cardona (UCSF)

The meeting was conducted via conference call. Notes from the 3/15 meeting were reviewed and accepted without correction.

Project Status Update

Adam reported that the coding is approximately 50% complete on interface processing and substantial progress has been made on report period initiation and report generation coding. The milestone dates of a beta release on October 1st, and a production release in February 2006, are still on schedule.

TAG members were updated on the discussions at the previous Management Group meeting regarding hiring a training and communications specialist to prepare common materials for the project. This position should be filled by the end of April.   Macromedia Breeze was mentioned as a possible product/platform for development of training materials.

TAG members were also provided an update on the work of the Requirements Group which completed detailed requirements for system-generated notifications and reminders. The specifications for these features of the system have been posted to the project website.

Review of View Specification

Eli reviewed a new document which provides specifications for the user interface and the ERS web application. The document is meant to serve as a driver for the development process of the web application and Struts configuration. TAG members were encouraged to follow the development of this document through the project website.

Review of changes to Interface Specification

Adam highlighted the most recent changes to the interface specification. The Corporate Account/Fund Profile will be updated with new code values to help identify special case federal funds that do not require certification of effort. Once these code values have been established, campuses can update their fund profiles to properly identify these funds so that they can be excluded from effort reporting.

Lyle raised a question regarding the format of the cost sharing interface file. Specifically, how the begin date/end date and period code fields would be used. A brief discussion followed regarding how a cost sharing percentage or dollar amount for a specific project could be applied to a reporting period.

UCLA asked, in reference to the USER interface file, whether updates had to be detected and sent on a regular basis. Adam responded that the entire USER file can be processed on each run, and that changes will be detected by the interface loading program. This program will detect and insert new records, and update existing records when changes are detected.

Next Meeting
Adam advised the group that two topics were planned for discussion at future meetings. The May meeting will address the topic of authentication and authorization system interfaces. The June meeting will address portal integration issues.

The Technical Advisory Group will keep its meeting schedule in place through the summer. If there is a shortage of agenda items during one of the summer months, the meeting may be cancelled.

The next ERS TAG meeting will be Tuesday May 17, 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.