

**Effort Reporting System**  
Technical Advisory Group  
Notes of the May 17, 2005 Meeting  
DRAFT – 5/17/2005 Accepted – 6/21/05

Participants: Renata Ellis (UCB), Don Rutherford (UCB), Lyle Kafader (UCSD), Mabel Lai (UCLA), Judith Freed (UCLA), Jonathan Keller (UCD), Beatrice Cardona (UCSF), Adam Cohen (UCOP), Wayne Kidd (UCOP), Abdulla Jehaberdeen (UCOP), Eli Cochran (UCOP)

The meeting was conducted via conference call. Notes from the 4/17 meeting were reviewed and accepted with the minor correction that the Requirements Group was not going on hiatus but would continue meeting throughout the summer.

**Project Status Update**

Adam reported that coding is proceeding on interface file processing, the Struts framework for the web application, and internal report period and report creation processing. The milestone dates of a beta release on October 1<sup>st</sup>, and a production release in February 2006, are still on schedule.

**Cost Sharing Interface**

Adam reported that a discussion of the cost sharing interface file which occurred at the April meeting of the Management Group resulted in the group reiterating that the cost sharing commitment for a project should only be stored as a percent of effort for a single project, and that no attempt should be made to allocate this percentage across any particular time period.

As a result, the cost sharing interface will be simplified to require only the employee ID, FAU and committed percent effort for that combination of employee and FAU. These commitments will be applied to the generated effort report without regard to reporting period. If the commitment must be adjusted or removed, this change should be made in the source system and re-imported into ERS before the subsequent reporting period.

Lyle commented that this will present a challenge for both the creation of the interface file for input to ERS and also for the calculation of the dollar value of the cost shared effort for tracking in the UCSD cost sharing tracking system. Adam confirmed that the actual percent effort as certified will be available to ad-hoc query and that this could facilitate a back-end reconciliation of the certified cost sharing percent effort with the campus tracking system.

**QA Test Participation**

Adam reported that the Management and Requirements groups have endorsed the concept of a “pre-QA” test which would be conducted in the summer. The objective of this test would be to validate the new effort reports generated by ERS based on a set of known inputs. The UCOP development team would conduct the test but requested support from campus experts to help validate the results. TAG members were asked to consider what resources they might be able to contribute to the validation effort and report back at the next TAG meeting.

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**Additional Discussion**

Mabel asked for clarification regarding the use of “effective dates” on the financial system (FS) interface file. Adam responded that the mechanism for determining whether an FAU or Project was current was being revised and would be brought up for discussion at the next TAG meeting.

Adam asked campuses to investigate whether their campus had a practice of overriding the default Appointment Basis and Paid Over fields in the PPS system and if so, what the circumstances are when this might occur.

Renata requested a copy of a template of the project plan for ERS implementation that was mentioned during discussion. This document is available as a starting point for campuses who are beginning to plan for the implementation of ERS.

**Next Meeting**

The next ERS TAG meeting will be Tuesday June 21, 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.