

Effort Reporting System
Technical Advisory Group
Notes of the July 19, 2005 Meeting
DRAFT - 8/15/2005 Accepted -

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

The meeting was conducted via conference call. Notes from the 6/21 meeting were reviewed and accepted without revision.

Follow-up from June meeting

Adam reported that the team reviewed UCSD's request to add a begin/end date to the cost sharing interface file and determined that this could be supported. We will follow the Management group's direction that the system should not attempt to prorate or allocate of the cost sharing percentage, but the use of start and end dates can be viewed as an operational control for selecting records to be applied to the effort report.

Project Status Update

Adam reported that Steve Hunter has joined UCOP as a PA3 on the ERS project and will be responsible for continuing the development, enhancement and maintenance of the application after the February 2006 release.

Wayne reported that progress has been made on many aspects of the web application including payroll detail "drilldown", editing of effort reports, search criteria and authorization infrastructure.

Adam mentioned that the Management group requested a demo of the web application at the August meeting. The team will demonstrate the system as a "work in progress" for the Management Group and Requirements Group in mid-August.

Judith asked whether authentication and authorization will be included in the August demo to which Adam replied that it was doubtful that these features will be ready. The internal milestone of August 31 for "code complete" was still within reach and overall progress is still on track.

UCD will be starting work on development of System Administration after having spent a day at UCOP getting briefed on the development environment and toolset. Larry Johnson and Dan Lemus will be the programmers participating in this development effort. The goal is to include at least a portion of the system administration functions with the beta release in October.

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Review of Authorization API

Adam described the new API as an interface between the ERS application and a separate "service provider" module for authorizing access to effort reports. ERS will be released with a module for doing authorizations using internal database tables but this module can be replaced by campuses that need to interface to an existing external authorization system.

Lyle and Judith confirmed that UCSD and UCLA have existing role-based authorization systems in place. Beatrice confirmed that UCSF uses only the ARSM system that is part of PPS. Don reported that UCB uses Calnet for authentication but nothing was in use for authorization.

Judith asked whether campuses were going to create their authorization rules at a broader departmental level or at a more granular level. There is concern about the administrative burden of managing a complex authorization scheme.

The group shared the concern that administration of permissions at the FAU or fund level might be too cumbersome to maintain. Judith indicated interest in authorizing at the department or organizational unit level. Adam commented that this approach would be supported by the system.

Lyle asked for confirmation that when access to a report was granted based on a rule, that the user would be given access to the entire report. Adam confirmed that this was the case. Lyle also asked for clarification of the purpose of the account department and fund department fields. Wayne responded that these fields are provided for campuses that can assign separate administrative responsibility to different parts of the FAU. For example, where one org unit manages the fund but the expenditures are the responsibility of another department.

UCLA and UCSD indicated that the API appeared to be compatible with existing authorization systems and that creating a custom service provider module would be feasible. Adam asked that the interface document be shared with the staff that would be involved in the development of campus customization to help vet the design and identify any issues that may exist.

Additional Discussion

Judith polled the group about implementation timeframes and what the earliest date was that campuses would be attempting run effort reports. Renata responded for UCB that the plans are still being formulated and that the first ER

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cycle would be no earlier than Spring 06. Lyle responded for UCSD saying that this was still being decided and that the campus was considering changing their reporting periods to a less frequent schedule. UCSD would implement in the spring or later. UCSF is still in the planning stages and has not established any dates yet.

Next Meeting

The next ERS TAG meeting will be Tuesday August 16, 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.