

Effort Reporting System
Technical Advisory Group
Notes of the September 20, 2005 Meeting
DRAFT - 10/17/2005 Accepted - 10/18/2005

Participants: Beatrice Cardona (UCSF), Judith Freed (UCLA), Lyle Kafader (UCSD), Renata Ellis (UCB), Don Rutherford (UCB), Larry Johnson (UCD), Adam Cohen (UCOP)

The meeting was conducted via conference call. Notes from the August 16th meeting were reviewed and accepted without revision.

Project Status Update

Adam reported that work on development is wrapping up and that there are a very small number of functions still to be coded. All of the campus operating environments have been replicated at UCOP including various combinations of Java application servers and database management systems.

All data requested for the QA has been provided including interface files from UCD and UCLA and payroll extracts have been run for November 2004 through August 2005 in preparation for QA test cycles. Unit test cases have been received from the campuses to highlight employees with complex sets of sponsored projects.

UCOP will run QA tests for UCD reporting periods, followed by UCLA, then UCSD in late October.

The team has also been working on build and release procedures and deployment scripts in preparation for the first distribution of the ERS software by Monday October 3rd. However, the team may decide to defer release for another week in order to complete more of the QA testing.

Judith reported that UCLA has been considering going with DB2 mainframe as their ERS database to reduce the number of operational environments that have to be supported at the campus. Adam responded that this selection will be supported.

Adam reported that the ITLC met at UC Davis and that Jon Good and Mike Allred presented an update ERS which included a short demo of the system.

Authorization Discussion

UC Davis' development of the system administration functions has identified a question whether a sufficient level of delegation exists in the security and authorization management module.

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Adam posed two questions: what levels of delegation exist within existing authorization subsystems such as DACSS and UCSD-Roles, and what level of delegation is required for ERS.

Judith responded for UCLA that DACSS allows central administrators to give access to pre-defined functions to departmental security administrators (DSA's). The DSA's then assign users to the function to control access.

Some functions are yes/no and other are value-based, usually on some component of the organizational hierarchy such as department, subdivision, division, organization. Other value-based rules are by FAU which can include a partial FAU or a wildcarded FAU.

For ERS, UCLA will probably want to authorize by fund number, or ideally a range of fund numbers. DACSS doesn't support ranges right now. There is concern about the administrative burden of authorizing by fund number without a range feature.

Lyle reported that the UCSD system uses a similar structure and they will probably administer ERS using a high level organization code. The authorization interface defined for ERS will provide the necessary data to make an authorization decision.

Don reported that UCB has the Calnet system for authentication and that Gary Thackeray's group has the expertise with interfacing applications with campus authentication and authorization.

Beatrice reported that UCSF is using ARSM for PPS, but no common system is in use for other financial applications. Larry responded that UCD will likely use the ERS internal authorization module.

Adam summarized the discussion saying that the development team will need to analyze the delegation issue further and may need to plan for enhancements to the system administration and/or authorization modules to provide additional capabilities in ERS.

Next Meeting

The next ERS TAG meeting will be Tuesday November 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.