**Effort Reporting System**
Technical Advisory Group
Notes of the January 17, 2005 Meeting
DRAFT – 1/18/2006 Accepted – 2/21/06

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

The meeting was conducted via conference call. Notes from the November 15th meeting were reviewed and one correction was noted. On page 2, fourth complete paragraph contained an incomplete sentence. The notes will be revised and finalized at the February TAG meeting.

**Project Status Update**
Adam reported that the QA process is complete and approximately twelve items are being finalized in preparation for the February 6th release date. There are a few functional items but most are internal technical items such as code cleanup and adding additional data collection mechanisms for support and diagnostic purposes. The development team is continuing to work closely with the pilot sites to provide support for their testing efforts.

**Campus Pilot Updates**
Larry reported that the Davis pilot was currently dealing with issues of applying cost sharing data to effort reports. Adam noted that the FAU on the cost sharing interface file must match an FAU that appears on the PPS interface file. User pilot testing is pending resolution of this issue.

Lyle asked whether changes to cost sharing data would trigger a late-arrival process similar to what is done for payroll data. Adam noted that this question was also raised by UCD but that there is no provision in the current design for processing cost sharing changes. The cost sharing data is read once during report generation and subsequent changes to cost sharing data will not affect existing reports, only reports that will be generated in the future.

Mabel reported that the UCLA pilot was currently at the point of recreating the database in order to test processing of expense transfers. There is also a performance problem on the financial system interface load. Judith expressed concern at the runtime for report generation. Adam responded that the development team is focused on performance tuning and optimizing the application code right now and expects to issue updates to the software shortly which address these performance concerns.

Mabel reported an issue from the UCLA functional team in which they requested that ERS suppress the display of the subaccount element of the FAU. Adam reported that the initial response to this issue was that the full FAU must be carried on the funding source table in order to match against PPS transactions. Suppressing the display of this element would be confusing to users because they would see what appear to be duplicate entries with the same FAU since the subaccount would not be visible to distinguish the different funding source rows. Adam will follow up with Rick Valdivia to discuss this requirement further.

**Review of Documentation**

The first draft of the Installation and Operations Guide was circulated for review. This document is intended to provide a first-time installer with instructions on how to install and perform basic configuration of ERS. One comment was that the guide should state that it is written with the assumption that a first-time installation is being performed. Pilot sites, for example, would not have to follow many of the first-time setup steps. Also, subsequent releases can assume that an installation exists and only needs to be upgraded with new software. These clarifications will be made to the document.

A companion document, the ERS Customization Guide, will be circulated for review at the next TAG meeting.

**Next Meeting**

The next ERS TAG meeting will be Tuesday February 21, 2006 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.