

**Effort Reporting System**  
Technical Advisory Group  
Notes of the February 21, 2006 Meeting  
DRAFT - 3/17/2006 Accepted - 3/21/06

Participants: Beatrice Cardona (UCSF), Judith Freed (UCLA), Lyle Kafader (UCSD), Mojgan Amini (UCSD), Don Rutherford (UCB), Larry Johnson (UCD), Adam Cohen (UCOP), Steve Hunter (UCOP), Wayne Kidd (UCOP)

The meeting was conducted via conference call. Notes from the January meeting were reviewed and accepted. Revised notes from the November meeting were reviewed and accepted.

**Project Status Update**

Adam reported that Release 1 was issued on February 6<sup>th</sup> as scheduled. Although there were a few outstanding issues still open at the time of release, the release was stable enough to distribute. As of this meeting, all of those remaining issues have been resolved and Release 1 was refreshed on the ERS website. The team is now starting to plan for the next releases and the Requirements Group will be reviewing the items on the enhancement list to approve and prioritize the next set of system changes.

Release 2 will include technical and performance enhancements. Release 3 will be the first functional upgrade to the software and will include the decentralized system administration feature that is being developed by UC Davis.

Larry reported that the development of this enhancement was proceeding with both Larry and Dan Lemus doing the development. Adam responded that the enhancement will be released as soon as it is ready.

Wayne reported that in response to comments from UCLA regarding performance of the FS interface process, additional optimization work was done and after a slight redesign the performance of this process has been improved by many factors. An update that took twelve hours to run is now taking less than one hour. Don raised the issue of when an FS update might occur twice in one day. Adam clarified that because a single date field is used to detect updates to FS records, the implication is that only one FS file could be run per day. The group agreed that this was most likely an extreme case although an enhancement will be submitted to record the suggestion that we expand this date field to a full timestamp.

Adam reported that the ERS hosting infrastructure is under development. Jane Meyer is the manager leading that project. The ERS development team is advising the hosting group. The system will be available for campus data loading and testing in the April/May time frame. UCSD and UCB have reached agreements to host at UCOP.

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Lyle commented that UCSD is planning for implementation of ERS and would likely be coming up on the ERS hosting system with July 1 data. Don reported that UCB is still in the planning process and refining the SLA with UCOP.

Adam reported that Barbara Vanden Borre will be supporting the hosted ERS service in her group similar to what is done for the Base Payroll/Personnel System. ERS will follow most of the procedures used for Base PPS. Wayne will be assisting with campus implementations when customization is required.

### **Campus Pilot Updates**

Larry reported that the latest pilot build was just installed and Davis is preparing test cases to run against this new update. Davis will be verifying some of the late-arriving pay functionality. User testing is being scheduled to start within a couple of weeks. Some enhancement requests have come out of the first stages of the review of the system.

Judith reported that UCLA has begun user testing and March 7<sup>th</sup> is target date for receiving feedback from pilot test participants. Reports have been generated for multiple periods and are loaded in the test database. UCLA is analyzing the customization required to interface ERS with DACSS for authorization and ISIS for authentication.

UCLA is also analyzing how the new "fund attribute" data elements might be added to their financial system. These fund attributes were intended to assist in the preparation of the ERS FS interface to allow the necessary certification indicators to be set correctly on the FS file.

Adam reviewed the status of this issue. There was little support at UCOP for expanding the corporate account/fund profile system (CAFP) to include new elements for ERS. The owners of this system preferred the approach of adding new code values to existing elements. This issue is still being discussed with the Management and Requirements groups.

Lyle asked whether the pilot campuses had formal test plans that could be shared. Don also expressed interest in seeing these as examples. Adam will follow up with Rick at UCLA and Larry will follow up Debra Henn at UCD to request examples.

### **Review of Documentation**

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The first draft of the ERS Customization Guide was circulated for review. This document is intended to provide detailed information on all the configuration options supported by ERS and all of the programming interfaces for integrating with campus security systems. There were few specific comments on the document given the early state of implementation planning. The development team will provide support for ERS customization as campuses install the system and prepare for production implementation.

**Next Meeting**

The next ERS TAG meeting will be Tuesday April 18, 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.