Effort Reporting System
Technical Advisory Group
Notes of the March 21, 2006 Meeting
DRAFT – 4/17/2006 Accepted – 4/18/06

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

The meeting was conducted via conference call. Notes from the February
meeting were reviewed and accepted with notation of a correction to an
incomplete paragraph. The notes will be corrected and posted to the project
website.

Project Status Update
Adam reported that the Requirements Group had met and reviewed the
functional enhancement requests collected to date. About half the items on the
list were approved and work has begun on these items. The most significant
item that will be included in Release 2 will be support for DB2 v7 for the
mainframe.

Adam described the plan for release materials. Each release will include a cover
letter which summarizes the changes included in the release and any special
installation steps.

Release 2 will be issued towards the end of March. Releases will continue to be
issued on a monthly basis until the bug and enhancement lists is caught up
which we estimate to be approximately June or July.

The ERS project website has been revamped and the new main tab is called
"Maintenance and Support". This page includes a new "maintenance schedule"
which tracks the items being worked on for each release and the estimated time
frame for release. This page also includes links to the release materials
themselves.

Mabel asked whether releases would include change tracking to indicate which
source modules were changed. Adam responded that we should talk about
whether ERS should be maintained in source form or in binary form since the
design of ERS is meant to allow for customization without modifying base
source. This item will be brought back for further discussion.

Campus Pilot Updates
Mabel reported that UCLA extended the pilot to the end of March to allow more
time for user testing. A question was raised about data retention and the
potential for performance issues when the database grows significantly. Adam

responded that this is a potential issue and that we need business requirements for data retention.

Larry reported that UCD had started training for ERS pilot users and the system was generally well received although a few issues were identified which need research.   Two additional classes are scheduled and the pilot is expected to run through the end of the month.

Maintenance Protocol
Adam introduced a document describing the proposed maintenance protocol for ERS. Release notification contacts were identified. Renata mentioned that PPS uses a listserv for release notifications and Adam responded that this approach would be investigated for use with ERS.

The group discussed the ERS release life-cycle and whether there was any consistent time frame that could be adopted for installation of new releases.   The group generally agreed that efforts would be made to "stay current" and that would more likely be successful given the size of the ERS application. But various factors such as training, conversion and workload could cause variation in the time to install and implement new ERS releases.

One reason cited for potential delays in release installation was the analysis required to apply local modifications to the source code for new releases. Adam reiterated the philosophy of the project that source modifications should not be necessary. The development team would prefer to have the opportunity to provide an exit point or customizable module to address any campus-specific requirements that might otherwise require a source modification.

Other Discussion
Judith asked about the status of the proposed changes to the corporate account-fund profile to add additional data elements for ERS use. Adam responded that all sites had indicated that the modifications could be made locally and the decision was made not to include these new elements in the CAFP specification. Upon implementation, campuses would be able to use these new local data elements to prepare ERS interface files that excluded the special funds – such as those for work study or IPA's.

Next Meeting
The next ERS TAG meeting will be Tuesday May 16, 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.