Common Systems Group (CSG)

August 24, 2004
Meeting Summary

CSG Attendees: Paul Craft, Steve Duim, Bill Jepson, Carol King, Greg Kitch, Robert Konishi, Max Kopelevich, Michelle Lew, Kathleen O’Kane, Tom Phelan, Sean Pine (for Jason Frand), Nick Reddingius, Terry Ryan, Ruth Sabean, Mike Schilling, Marsha Smith, Eric Splaver, Kent Wada, Esther Woo-Benjamin, Don Worth

Guests: Glyn Davies (AP&B), Peter Kovaric (GSEIS), Pamela Taylor (Grad Division)

Agenda:

1) New AP&B Budget System Update

Glyn Davies gave the Group an overview of the new campus budget system, renamed C-BIG (Campus Budget Implementation Group). This project is an example of an application that has gone through a local process that parallels the campus-wide ITPB Project Development Flow Process and is now being brought to IT committees to raise awareness and surface impacts.

As a result of continued efforts associated with the campus planning process, AVC Davies was directed to implement a campus budgeting system by EVC Neuman and VC Olsen in June, 2003. The current budget system can be best termed a budget allocation process. What UCLA needs is a budget system that has budgeting analysis tools for managing its revenues and expenditures.

The Campus Budget Implementation Group is the functional sponsor for the project. This committee evolved from a group of CFOs involved with design and implementation of the 2004-05 budget reduction process. It has academic and administrative representation from L&S, Medical Center, Engineering, Education, Arts & Architecture, Administration, AIS, APB, Student Affairs, and External Affairs. The committee members represent 60% of the total campus revenue budget excluding contracts and grants and approximately 94% of the contract and grant revenues and expenditures.

The committee identified the top needs/desired features of the system as: budget, data manipulation, IT, mapping, planning/forecasting, security, querying, reporting, and timing of implementation training. A vendor has been selected and contract negotiations are expected to be finalized September 3. The C-BIG hopes to be able to leverage the Campus Data Warehouse (CDW) project’s Managed Reporting Environment (MRE) tool. The contract for this tool is expected to be signed by the end of August.
A six week implementation is planned, with campus rollout to follow immediately and in time for the FY 05/06 budget process in December or January. When rollout is complete, the system can support 200 read only users, 182 budget input users, and 75 interactive users who review budgets. Sixty concurrent users can be supported. The system will be tested through variance reports in April (3rd quarter) and July/August (4th quarter/End of Year).

In answer to CSG questions, Glyn responded: at the desktop, the system requires only a web browser and 3 are supported; ISIS will be used for authentication and logon; the system is based at the FAU level so budgeting can be done at whatever level is desired, from organization down to FAU; the system supports single sign-on. There are some policy issues regarding authentication that have not been decided.

2) Travel Express Update

Current status of Travel Express is: most performance issues have been resolved; a majority of UCLA departments and 100% of UCOP departments are using the application; and almost 1800 reports were processed in July 2004.

A system upgrade is in the planning stage with functional oversight from an operationally focused campus-wide user group representing 20 different departments. The upgrade timeline is: programming and testing – November 2004; test pilot – December 2004; production – February 2005; and phased rollout – April 2005. A summary of the new system architecture, system interfaces, functions/features, and reporting are provided in the presentation: UCLA Express Travel System Upgrade 8-24-04: [http://www.csg.oit.ucla.edu/documents.htm#August2004](http://www.csg.oit.ucla.edu/documents.htm#August2004)

3) Wireless Standards Board Update


Two issues surfaced. 1) To protect our licensed resources, there needs to be language that says access is restricted to UCLA faculty, staff, and students. However, the issue is broader than just wireless and needs to be a network policy. (The Library has since said it is okay with the policy as is), 2) Since there are faculty that don’t want wireless in their classrooms, there needs to be provisions for mandatory dead zones.

**Actions:**
- Raise to the ITPB, the issue of having a network policy that restricts access to UCLA faculty, staff and students.
The Wireless Standards Board is seeking a new chair. There was a suggestion to open the position to the campus as an opportunity for someone to work outside the local environment. If departments would allow 8 hours release time per week, a stipend could be offered as compensation. The Group agreed this would be an interesting model to test. There was also a suggestion that this could be a PDP project.

4) **Enterprise Directory Identity Management Infrastructure (EDIMI) Project Technical Review**

The group chose Eric Splaver to be the CSG representative on the EDIMI Project Technical Review Committee. The review is being planned for October 2004.

5) **Campus Data Requirements**

This was a continuation of last meeting’s discussion of campus data requirements and standards for interoperability. Nick Reddingius is taking the lead on addressing these issues. As a first step, he will be leading a discussion on portal issues and things that sit behind portals at the September ITPB meeting. He will also be following up with the CMS group and what they’re doing with campus architecture on instructional systems. Nick will return to the CSG for further discussion.

6) **Repositioning IT Initiative**

An action from the last CSG meeting was for Jim Davis to craft a message of introduction to the initiative for all staff. The Group agreed that instead of this type of communication, it would rather receive a communication (in the form of a dialog) about the details and rationalization behind many of the assumptions in the initiative. For example, what information is behind the projected cost savings; what information is behind the decision that this initiative is necessary, how was “50 systems down to 10” decided; will there be layoffs, what are the larger goals; what is the jurisdiction (19900 money or not); will the new structure be as responsive (quality of service issues); are there true cost savings that can be redeployed? Several CSG members have had conversations with their staff about this initiative and all were asked these same types of questions.

The ITPB will be appointing two members to the Functional Oversight Committee who will represent the CSG. As input to the ITPB, the individual members of the CSG (not the CSG as a whole) suggested that the representatives should have the following qualifications:

- Willing to speak up
- Willing to entertain the initiative as a possibility
- Understand technical issues
• One person to take the pro point of view and one to take the con point of view
• Operational experience managing people and budgets
• Supports a 24x7 operation
• Can be communicative to the CSG to ensure the CSG’s viewpoint is well represented
• Able to commit the time
• Someone who’s unit will be directly affected
• Someone in a unit where provision of infrastructure is a big part of what they do
• Able to express the issues that are unpopular
• Iconoclastic
• Open minded
• Suitably skeptical
• Viewed as credible
• Familiarity with campus technical issues (historical and present)
• Supports a heterogeneous environment

**Actions:**
• Send additional suggestions to Marsha Smith.

**Meeting Schedule for Remainder of 2004:**

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<tr>
<th>Tuesday</th>
<th>September 28</th>
<th>2 p.m. – 4 p.m.</th>
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<tr>
<td>Tuesday</td>
<td>October 26</td>
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<td>Tuesday</td>
<td>November 23</td>
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<td>Tuesday</td>
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