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Re: Effort Reporting System – Base Release 10.0

We are pleased to announce the availability of Release 10.0 of the base Effort Reporting System. This release includes many enhancements and improvements, as well as bug fixes.

- This release includes the following enhancements:
  - 1033 – Compliance reports can now be filtered and grouped by account and fund organizations, in addition to home departments. If hierarchical organization data is available, you can elect to include sub-organizations in the filter set. When using this feature, please keep in mind that since the relationship between reports and organization is many-to-many, the same report can appear under more than one organization. For consistency's sake, the same externalized strings used to label the department dropdowns on the Department Create Search tab are used for controls on the define a compliance screen, and the labels on the generated reports. The statistical summary report layout has been reworked for clarity's sake as well. There are no configuration changes required for this enhancement.
  - 1453 – A new user preference has been added to highlight key data elements on the payroll drill down screen. The initial value defaults to having the shading off. Users can turn it on by navigating to the "Account Settings" screen. When enabled, certain columns of the payroll drilldown screen are called out with highlighting. There are no configuration changes required for this enhancement.

- 1851 – On reports in Multiline Certification mode, CDUE reminders will not be sent to PIs who have already certified their line(s) on a report. There are no configuration changes required for this enhancement.
- 1863 – For external authorization, a “timeout” URL capacity has been added. This requires a new configuration value in ERSConfig.xml to be set:  
`Configuration.AccessControl.Authentication.timeout-redirect-url`. This gives you the ability to redirect a user whose session time out to a different web page from the one that the application uses when the user encounters an authentication error upon login.
- 1948 – Hyperlinks to the payroll drilldown on the generated amount column have been removed from the Edit Effort Report screen. Users can still access the payroll drilldown by clicking the magnifying glass icon next to each number. There are no configuration changes required by this enhancement.
- 1985 – The IAuthorizer authorizer interface has been extensively reworked to facilitate external authorization. It drops unused methods, and reworks the signatures of existing methods to decouple the interface from internal ERS code. These changes should have no impact on instances using internal authorization. There are no configuration changes required for this enhancement.

In addition, this release fixes the following bugs:

- 1950 – The online single generate feature now works without risk of causing an application server out-of-memory failure. There are no configuration changes required for this bug fix.
- 2023 – Reporting periods can now be saved using the online system administration feature. The error message has been improved to provide the user with more information on the failure. There are no configuration changes required for this bug fix.
- 2025 – You can now delete a permission if it’s linked to a role. Previously this type of operation would fail silently. There are no configuration changes required for this bug fix.

A complete summary of the logged changes in this release can be found at the [Changes](#) link on the ERS Project Website, and in a README found in the /EffortReporting/WEB-INF/classes directory.

## Documentation changes

The *Customization Guide* and the *Installation Guide* have been updated for this release. New versions of these documents are available on the [Base ERS web site](#).

## **Configuration Files**

The ERSConfig.xml file has changed, adding a new external authenticated timeout URL option.

## **Interface Process Changes**

Release 10.0 makes no changes to the interface file specification.

## **Database Changes**

There are structure changes and additional base installation data inserts with this release. These changes include: the addition of a `shade_drilldown` column to the `ERSPreference` table to support enhancement 1453; the addition of a `org_type` column to the `ERSCompRptParams`, and substantial changes to the views that enable compliance reporting, both in support of 1033.

See the `ERS_R10.0_UPGRADE...` script corresponding to your DMBS vendor.

## **Java Changes**

There are no Java changes with this release.

## Installation Instructions

1. Backup /campus/<campusname> web customization folder (if used) and other configuration files.
2. Download the release WAR file and deploy using the application server deployment tool.
3. Restore /campus/<campusname> web customization folder, if used, after comparing to identify new and changed elements of the ERS skin.
4. Merge your previous version of ERSConfig.xml with the new version, adding the new option.
5. NB: if you are using a tomcat application server, you have to modify your catalina.sh script to set a environmental variable on the catalina JVM:
  - a. CATALINA\_OPTS=-Djava.awt.headless=true
6. Perform campus release testing.

## Timing of Installation

Installation of this release is not urgent. As usual, campuses are encouraged to install this release in as timely a fashion as possible, and in the normal numeric sequence of releases.

## Release Sunset

With this release, ERS is retiring support branch 9.2. Base ERS will no longer release any fixes or enhancements to this branch.

If there are any questions, please email [steven.hunter@ucop.edu](mailto:steven.hunter@ucop.edu) or call (510) 987-0138.