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**Re: Effort Reporting System – Base Release 10.11**

We are pleased to announce the availability of Release 10.11 of the base Effort Reporting System.

- This release includes the following two enhancements:
  - 3711 Archive and Purge  
A new archive batch process allows Effort Reports and their associated payroll reports to be removed from the 'active' ERS system and placed into new archive tables, by reporting period. During the archive process, all Effort Report versions, comments, and associated payroll reports for a given period are compressed and moved into the ERS archive tables. After archiving, the archived effort reports and associated payroll reports are accessible via new online functionality for searching, viewing, and printing.  
  
A new purge batch process can later be used to permanently delete archived Effort Reports and associated payroll reports from the archive tables, by period. Both the archive and purge are batch processes that will be executed on request by the production support group. Please consult your record retention policy before submitting a purge request.
  - 3644 Change selected drop down values and labels in the online system to be configurable  
This enhancement provides selected drop down values and labels in Effort Report selection and Compliance Report selection to be configurable. This change was requested by UCSF. These enhancements are controlled by switch search-alternate-filter4-visible in the configuration file, ERSConfig.xml. For more details see attached document, "UCSF Request - Bugzilla Item 3644 for ERS 10.11"

A complete summary of the logged changes in this release can be found at the [Change Summary](#) link on the ERS Project Website.

## Documentation changes

The following documents have been updated for this release. The new versions of these documents, along with the marked-up versions, are available on the [Base ERS web site](#).

- *ERS Customization Guide* – Two new config options have been added
- *ERS Installation Guide* – No changes.
- *ERS Interface Specification* – No changes.
- *ERS 10.11 Design Document* – This is the design document for changes pertaining to this ERS release.
- *Customization Guide* – Updated for new ERSSConfig file switch 'search-alternate-filter4-visible'.
- *Change Summary* – Summary list of ERS enhancements by release.
- *Change Summary (Technical)* – ERS objects changed in this release.
- *Bugzilla Item 3644 for ERS 10.11* – Detailed description of 3644 changes.

## Configuration Files

The *ERSSConfig.xml* file has been changed. The following new options have been added:

```
<search-alternate-filter4-visible>true</search-alternate-filter4-visible>
```

If search-alternate-filter4-visible is not included in ERSSConfig.xml, the ERS application will function as if search-alternate-filter4-visible is set to false. A 'false' value means no change to ERS functionality

If search-alternate-filter4-visible is set to true, the following will occur:

- 1:** The 'Compliance Report Generation' screen 'Department Type' dropdown list will not prompt for 'Account Org' and 'Fund Org' when search-alternate-filter4-visible is set to true
- 2:** The Effort Report, 'Search Reports' tab, 'Departments' tab, 'Choose Department Type' drop down list, 'Account Department' and 'Fund Department' will not be prompted when search-alternate-filter4-visible is set to true
- 3:** The 'Edit Permission' screen, 'Resource Type' drop down list will not include 'Funding Source Account Department' and 'Funding Source Fund Dept' when search-alternate-filter4-visible is set to true

UCSF's ExternalizedStrings.xml changes:

- 1:** The following changes were made to the UCSF ExternalizedString.xml table  
To change the verbiage on the Effort Report, 'Search Reports' tab, 'Awards' tab, 'Filter By:' options

```
<PrimaryFilter1Label>Project ID</PrimaryFilter1Label>  
<PrimaryFilter2Label>Project Name</PrimaryFilter2Label>  
<PrimaryFilter3Label>Sponsor Award #</PrimaryFilter3Label>
```

\*\* See attached word document 'UCSF 10.11 Configuration Changes' for more detail.

## Scheduling an Archive or Purge

To archive or purge an ERS period, contact production support and request:

- job 'ers2archv' to archive an ERS period.
- job 'ers2purge' to purge an ERS period.

## Interface Process Changes

No changes have been made to the interface processes.

## Database Changes

There are database structure changes with this release. These changes are:

- Tables ERSArchivedReport and ERSArchivedFS are new:
  - ERSArchivedReport contains archived Effort Reports.
  - ERSArchivedFS contains archived payroll reports.
- The following new table indexes have been added:

◦ ersar_rpt	ERSArchivedReport( rpt_seq_nbr )
◦ ersar_per	ERSArchivedReport( per_id )
◦ ersar_pname	ERSArchivedReport( per_name )
◦ ersar_eid	ERSArchivedReport( emp_id )
◦ ersar_ename	ERSArchivedReport( emp_name )
◦ ersarfs_fau	ERSArchivedFS( ern_fau )
◦ ersarfs_ao_id	ERSArchivedFS( acct_org_id )
◦ ersarfs_ao_name	ERSArchivedFS( acct_org_name )
◦ ersarfs_fo_id	ERSArchivedFS( fund_org_id )
◦ ersarfs_fo_name	ERSArchivedFS( fund_org_name )
- See the *ERS\_R10.11\_UPGRADE...* script corresponding to your DBMS vendor for details.

## ERS 10.11 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. NB: If you are using a tomcat application server, you have to modify your catalina.sh script to set an environmental variable on the catalina JVM:
  - a. CATALINA\_OPTS=-Djava.awt.headless=true
5. 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.

If there are any questions, please email [~IRC-BASEERS@ucop.edu](mailto:~IRC-BASEERS@ucop.edu) or contact one the following persons:

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