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Re: Effort Reporting System – Base Release 10.3

We are pleased to announce the availability of Release 10.3 of the base Effort Reporting System. This release includes many enhancements and improvements, as well as bug fixes.

- This release includes the following enhancements:

  o 2073 – Certification Tolerances to address rounding issues due to payroll expense transfers

     When late pay changes the generated values of a certified or certified/adjustment required report, the application now applies a 1% tolerance when determining if the new report should be reissued.

  o 2272 – Percent of Effort Reports Certified by Established Due Dates

     The status summary compliance report now includes the percent of reports certified by the report period's due date. This figure is available both at the departmental the campus level.

  o 2273 – Percent of Effort reports Certified for a Given Reporting Period

     The status summary compliance report now includes the percent of certified reports for a given reporting period at the campus level.

- 2274 – Individual Knowledgeable of Work Performed/Suitable Means of Verification

  There is a new certification distribution report that calculates the number of reports certified by each individual user in the system, and reports the totals in as a distribution across five groupings: 0-25, 26-50, 51-75, 76-100, and greater than 100.

In addition, this release fixes the following bugs:

- 1118 – Statistical detail report max/min/average counts incorrect

  The days overdue and the days to certification max/min/average values for each group are now reporting the correct values.

- 1157 – Report generation not marking reports with negative lines as exception status

  ERS now assigns exception status to any report generated with a negative value for any line (certifiable projects, other sponsored category, or non-sponsored category).

- 1319r – Can't use Reissued/Partially Certified list filter introduced by the original enhancement

  ERS could not save as a user preference the last report list filter run when using the "re-issued partially certified" filter due to a database field length being not big enough. The ERSPreference table has been expanded to hold up to 30 characters in the LIST_FILTER field, which resolves this problem.

- 1539 – Status Report Summary has incorrect percentages

  When running the Status Report Summary grouped by department, the percentages were based on the number certified (or open, not required, etc.) for the period divided by the total number of reports for all periods. It now divides just by the total number of reports in each specific period. The same problem also occurred when the grouping was switched to by period.

- 2155 – Report can be flagged as overdue on a report list one day early

  The report list view flags overdue reports. The date comparison logic could flag reports as overdue one day early, due to inclusion of the timestamp portion of today's date. The application now only compares dates when determining if a report is overdue.

- 2171 – Compliance reports: last modified date incorrect (Oracle only)

  The views used by some compliance reports selected the report header's last modified date instead of the latest effort report's change date. This problem existed in the Oracle versions of the DDL.

- o 2183 – Compliance reports: Statistics summary reports not showing recertified counts

  All statistic summary reports now display the count of recertified reports for each outer group.

- o 2185 – Compliance reports: Statistics report detail has incorrect recertified totals

  The counts of reports reopened, reissued, and recertified for each outer grouping on all statistical detail reports are now correct.

- o 2187 – Compliance reports: allow filtering on all account/fund orgs

  Previously on the compliance report view, when grouping by account or fund org, the application would filter out orgs from the drop down list that were not related to any funding source in the system. This defeated the purpose of the "include sub orgs" feature. The application now lists all available orgs.

- o 2302 – Saving a multiline report without any above-the-line items fails

  If a report is marked as requiring multiple certifications when the report has no above-the-line items, the save will fail with an exception. This fix allows such a report to be successfully saved.

- o 2328 – Late pay drops certified by value when versioning up a reconciled certified/adjustment required report

  ERS would drop the "certified by" information when reconciling a certified/adjustment required report, so that the new version would not show who certified the previous version. It now preserves this information. This problem impacts the Certification compliance report, causing it to not display the user ID of the person who certified a report in the cases where late pay has reconciled the report.

- o 2356 – Reports with no effort above the line after rounding not adjusted

  If a report has items requiring certification with less than 1% of the total effort on the report, after rounding their original payroll amount can become zero. The adjustment business rules caused these reports to be skipped for adjustment, leaving the total at 99%. The adjustment logic now applies the business rules to the original, unrounded four digit amounts, so that adjustment is applied to these reports when needed.

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 *Installation & Customization Guide* has one minor change with this release. The new version of this document is available on the Base ERS web site.

Configuration Files

There are no changes to any ERS configuration file with this release.

Interface Process Changes

There are no changes to any ERS interface specification with this release.

Database Changes

There are structure changes with this release. These changes include the following:
- Expand ERSPreference.LIST_FILTER column.
- Add two new views to support 2274.
- Modify three existing views to support 2272.
- Modify nine existing views to support 2171 (Oracle only.)
- Add one new view to support 2183.
- Modify three existing views to support 2183.

This release also includes one repair script to fix the data problems created by 2328.

See the ERS_R10.2_UPGRADE… script corresponding to your DMBS vendor for details.

Java Changes

There are no Java system parameter or release level recommendation 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. 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 <u>not urgent</u>. 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 10.1. Base ERS will no longer release any fixes or enhancements to this branch.

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