UNIVERSITY OF CALIFORNIA

BERKELEY • DAVIS • IRVINE • LOS ANGELES • MERCED • RIVERSIDE • SAN DIEGO • SAN FRANCISCO   SANTA BARBARA • SANTA CRUZ

OFFICE OF THE SENIOR VICE PRESIDENT —
BUSINESS AND FINANCE

OFFICE OF THE PRESIDENT
1111 Franklin Street
Oakland, California 94607-5200

September 10, 2010

MOJGAN AMINI   BEATRICE CARDONA
SUNGSOO YANG   BARBARA VANDEN BORRE
WEN TANG   KRISTINE CARPENTER
LOU BROWDY

Re: Effort Reporting System – Base Release 10.4

We are pleased to announce the availability of Release 10.4 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 2189 – Add "My Projects" type filter to compliance reports

  The compliance reports can be created using a new filter criteria, "My Projects". User will see a list of "myProjects" to which they are subscribed to. The results of the compliance report will be filtered to only include reports that would appear on the selected My Projects search(es).

  o 2390 – New compliance report #4 - Multiple Certification Reports

  This report measures the percentage of reports for each home department, account org, fund org, and/or period where the report was certified multiple times. This is an indicator that the certifiers are not reflecting the true effort at the time of initial certification, and that additional training is needed.

  o 2391 – New compliance report #5 - Not Self-certified Reports

  This report measures the percentage of reports that were not self-certified out of the total reports requiring self-certification based on PI status or one of the established CTO groups. This is an indicator that the certifier may not have first-hand knowledge of the employee's effort.

- In addition, this release fixes the following bugs:

  - 2415 – Version 1.0 reports with invalid earnings get open status

  Initially generated reports with one or more unrecognized earning(s) should have exception status but the application assigns open status. This has been corrected.

  - 2416 – Partially certified reissued reports don't retain entered values

  When the late pay batch job would reissue a partially certified report, any effort values previously entered by a user would be overwritten by the new generated amount on the new report version. This has been fixed so that user-entered values are retained.

  - 2436 – Filtering the PI list in the Subscribe to PI's My Projects can lead to an empty screen

  When filtering the PI list after paging forward, if the filtered set had fewer pages than the current page being displayed, the application would display an empty screen. Now when filtering the list, the application resets the view to the first page in all cases.

  - 2489 – Incorrect percentage of reports on time on Effort Report Status

  Percentage of reports on time was being calculated incorrectly. This has been fixed.

  - 2491 – All Reports: report title changes on all reports

  Title and subtitle have been adjusted for all reports. Title line now indicates the report name and major selection criteria.

  - 2493 – Issue with percent of self-certified on Certification Listing

  The calculations of percentages at department or period level were incorrectly done. This has been fixed.

  - 2494 – Alignment and font of self-certified percent on Certification Listing

  Self-certified percentage was not in proper alignment with label and used a smaller font. This has been corrected.

  - 2495 – Add org code to drop-down lists on Compliance Report Selection page

  The department Id/Org Id have been added to the drop-down selection list for easier identification. An external campus customization option has been added to indicate if the Ids should be displayed before or after the department/org name.

  - 2498 – Show selection criteria on all reports

  A cover page has been added to all reports. This page, along with report title, will list the selection criteria specified to generate the report. In addition to this, all report page footers have been changed to include page numbers.

  - 2500 – Statistical Analysis Summary and Detail need to be better synchronized

  Summary and Detail for Statistical Analysis didn't match. This has been fixed.

  - 2502 – Combined Threshold Report percentages in decimal format

Percentages on the Combined Threshold Report have been changed to print in % format.

- o 2503 – Compliance Reports selection criteria - required field indicator

A red asterisk has been added before the label for required selection filters.

- o 2509 – Show report title on every page of PDF reports

A standard report title will appear on each page of the report. All reports have been fixed.

- o 2514 – Certifier title code on Certification Listing

Determination of title code has been standardized among all reports to use restrict the set of earnings used for this determination to just those within the reporting period of the report in question.

- o 2523 – HTML report formatting

Page footers have been removed from HTML output format.

- o 2527 – Display of certifier name if certifier has no employee ID in the system

The application uses the first and last names of the user in cases where the certifying user does not have a linked employee ID.

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 been updated for this release. The new version of this document is available on the [Base ERS web site](#).

Configuration Files

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

- prefix-OrgId-for-compliance-report-dropdown

This option controls how the department/org names are displayed in the drop-down list on the compliance report selection page. Setting the value to "true" will prepend the department/org Id to the name and the list will be sorted by department/org Id. Setting the value to "false" will append the department/org Id to the name and the list will be sorted by department/org name.

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:

- Added a new column `MYPROJECT_FILTER` to the `ERSCOMPRPTPARAMS` table.
- Add 8 new views to support new compliance reports.

- Modify 4 existing views to support bug fixes.

See the ERS_R10.4_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 10.2. Base ERS will no longer release any fixes or enhancements to this branch.

If there are any questions, please email rajeev.gupta@ucop.edu or call (510) 987-9695.