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Re: Effort Reporting System – Base Release 10.5

We are pleased to announce the availability of Release 10.5 of the base Effort Reporting System.
This release includes four enhancements and improvements, as well as bug fixes.

- This release includes the following enhancements:

  o 2188 – Enable organization selection by org code when filtering compliance reports

    This feature adds the capability to directly enter department codes and names for
    filtering on the compliance report selection screen. The system will suggest and
    auto-fill the selection based on the characters entered.

  o 2368 – Enhancements to the Excel version of the compliance reports

    The Excel versions of all detail compliance reports have been simplified to allow
    sorting and filtering in Excel.

  o 2377 – New automated PI MyCertifications list (like My Projects)

    This enhancement adds a new system built-in search for PIs, called *My
    Certifications*. This search includes all of the PI's own reports, and all reports on
    the PI's *My Projects* search which contain effort on projects for which the PI is
    designated as the "Account PI", while excluding reports requiring self-certification
    and those belonging to other PIs. Like the built-in *My Projects* search, users can
    subscribe to a PI's *My Certifications*.

    This list is optional and will be available only for campuses which have this feature
    turned on. A new option, *show-myCertification-search-list*, has been added to

ERSConfig.xml. Setting this flag to true will make the MyCertifications list available.

There is a new optional batch job, RunAccountPIInterface, and interface file to indicate which PIs are account PIs. See the **Account_PI Interface File** section of interface file specification for details.

- o 2510 – Add a link to the compliance reports in the ERS system header

  A new link at the top of the ERS screen will appear for the users who are authorized to run compliance reports. This link has been added for easy access to the compliance report screen.

- In addition, this release fixes the following bugs:

  - o 2526 – Certification Listing report formatting

    Prevent truncation and wrapping on this report.

  - o 2687 – Column spacing on Certification Listing

    Prevent truncation of column headings on this report.

  - o 2688 – Labels on Certification listing

    Changes have been made to the Certification Listing report to correct column labels and field wrapping. The column spacing on the Certification Listing report has been corrected.

  - o 2689 – Date Format on Multiple Certification and Not Self-Certified reports

    Date format changed from mm/dd/yy to dd-MMM-yy.

  - o 2693 – Labeling on Multiple Certification Report

    Column labels on the Multiple Certification report have been made more meaningful.

  - o 2741 – Sorting and grouping issue by Account department on the Certification Listing report by account department

    The Certification Listing by account department was sorted on department name. It has been corrected to sort on account department id instead.

  - o 2747 – Saving report period fails due to date ordering error

    If the certification date of the period occurred in the next year after the report run date, the date validation on the certification date was failing. The validation logic was using the run date's year value instead of the certification date's year value, causing the certification date to appear to precede the run date. This has been corrected.

  - o 2761 – Can't add more than one resource of the same type when creating a permission

When creating a permission, adding a second resource of the same type as one already added caused an alert to appear indicating that the resource already exists in the list. The validation was comparing only the resource type value, which is always the same for the same type of resource. This fix changes the validation to compare the combination of both the resource type and the resource value.

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 Guide, the Customization Guide and the Interface Specification* have 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 been changed. The following new option has been added:

- show-myCertification-search-list

This option controls the new system built-in PI search – MyCertifications. If this option's value is set to "true", the system will create a new search, named "MyCertifications", for all PI's. This search will also be available for subscription to other PIs.

The ExternalizedStrings.xml file has been changed. The following new externalized string has been added:

- <AccoutPi>(Account PI)</AccoutPi>

This string is displayed on effort reports when users hover over the project details for above-the-line items to label those PIs who are designated as "Account PIs". See enhancement 2377 above for more details.

Interface Process Changes

Release 10.5 introduces one new optional interface load process, Account PI Interface file. See the Installation Guide and the Interface File Specification for more details.

Database Changes

There are structure changes with this release. These changes include the following:

- Added a new column `ACCOUNT_PI` to the `ERSPI` table.

See the ERS_R10.5_UPGRADE… script corresponding to your DMBS vendor for details.

The Oracle create script changes the definition of rpt_seq_nbr, the primary key of the ERSEffortRpt table, and a foreign key in several tables, to INTEGER globally, to avoid overflow issues with the previous datatype used.

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 10.3. Base ERS will no longer release any fixes or enhancements to this branch.

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