



OFFICE OF THE SENIOR VICE PRESIDENT –
BUSINESS AND FINANCE

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

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HAMED FOROOZANFARD
SUNGSOO YANG
WEN TANG
LOU BROWDY

BEATRICE CARDONA
KRISTINE CARPENTER

Re: Effort Reporting System – Base Release 10.7

We are pleased to announce the availability of Release 10.7 of the base Effort Reporting System. This release includes 8 enhancements and 7 bug fixes.

- This release includes the following enhancements:
 - 2371 – Enable Drilldown to Specific Employees on Certification Distribution Report
- Two new compliance reports have been created as drill-down reports for “Certification Distribution” report. These reports can only be generated after running the “Certification Distribution” report.

The existing Certification Distribution Report has been modified to make "Number of Persons" value “clickable”. Upon clicking the "Number of Persons" link, a new report, named "Certification Distribution Summary Report", is displayed, listing all of the certifiers making up that particular group. Two links have been added against each of the certifiers, to access the details in either PDF or Excel format.

Upon clicking one of the two links, a new report is displayed named, "Certification Distribution Detail Report". This report lists all of the reports certified by the selected certifier for a given reporting period.

- 2513 – Status field legend on Certification Listing
- A legend explaining status code abbreviations has been added on the cover page of Certification Listing report.
- 2690 –Need ability to enter any percentage for Combined Threshold report

Combined Threshold Report now allows for any threshold percentage from 1% to 100% as a free form input field.

- 2691 – Combined Threshold Report - CTO category filter

Combined Threshold Report now allows for filtering by one or more of the 5 CTO categories. Please note that this data is not available for reporting periods before 2010. This filter should not be used for reporting periods prior to 2010.

- 2750 – If there is no payroll for the period an effort report should not be generated, even for a PI

The system now checks if a PI has any earnings for the period and if there are none, an effort report is not generated.

- 2902 – Standard comment on certification not added if there's a user comment

Now the system will always add the standard comment and a user comment, if entered, when a report is certified.

- 2905 – Require comment when initial certification is made after the certification deadline

A new configurable option (ERSConfig.xml, option.require-overdue-certification-comment) if turned on will make a comment mandatory for reports if the initial certification is 120 days after the certification deadline.

The text that will be displayed is also configurable (ExternalizedStrings.xml, messages, OverdueCertificationCommentMessage). Please note that the comma needs to be escaped.

If the user enters a comment and does not save it prior to clicking the "CERTIFY..." button, the comment will be displayed in the required comment field and a configurable message will be displayed asking the user to edit the comment to explain the late certification (ExternalizedStrings.xml, messages, OverdueCertificationExistingCommentMessage).

- 2940 – Account Dept search - Option to filter out all effort reports where the searched dept is below the line

A new, optional, check box has been added for searching reports based on "Account Department". By checking this box, the search for a given account department is restricted to above the line items only.

Two new configurable options have been added in ERSConfig.xml to support this feature:

1. atl-acctOrg-search-checkbox-visible true/false (default is false)

This option shows (true) or hides (false) the new check box on the screen.

2. atl-acctOrg-search-checkbox-checked true/false (default is false)

This option is applicable only if the first option is set to "true". This defined the initial default value of the check box as checked (true) or unchecked (false).

- In addition, this release fixes the following bugs:

- 2126 – Enhance search capabilities to allow entry of multiple values at once

Changed the wording of the associated hints to be more exact.

- 2950 – Updating main PI on a sponsored project when running an FS file doesn't set the employee PI indicator

For the FS interface processing, if a new PI is assigned to a project, application was not updating the Employee record correctly. This has been corrected so that the PI flag in the Employee record is updated correctly for the new PI. Also, if there are no more projects associated with the previous PI, the PI flag is reset in the Employee record.

- 2953 – Certification Distribution report count include prior versions of the report

This has been corrected by counting only the current version of the effort reports.

- 3015 – Orgs names containing apostrophes do not display correctly in compliance report autofill

The JavaScript that handles the autofill values has been fixed to correctly translate the encoding of apostrophe character.

- 3025 – Account PI interface processing job name too long

In case the Account PI interface job fails, it tries to log the issue in the application message log table. The "Job Code" has been changed from 6 characters (ACCTPI) to 4 characters (ATPI) to fit the database field definition.

- 3039 – Application abends if manually adding a duplicate project to an effort report

The edit effort report function has been changed to identify duplicate project while adding a project to an effort report. The user will be given an error message if duplicate projects condition is found.

- 3042 – Application abends when 2 or more users subscribe to the same search.

There was an internal program error that could affect search subscription. This has been corrected.

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. The new versions of these documents are available on the [Base ERS web site](#).

Configuration Files

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

- require-overdue-certification-comment

This option controls whether or not to require a comment when initial certification for an effort report is more than 120 days after the certification deadline (see 2905).

- atl-acctOrg-search-checkbox-visible

This option controls the visibility of “Above the line search only” checkbox for account organization searches.

- atl-acctOrg-search-checkbox-checked

This option defines the default value of “Above the line search only” checkbox for account organization searches.

ExternalizedStrings.xml file has been changed to include the following customizable externalized strings with the corresponding supplied default value:

- OverdueCertificationCommentMessage - This report is out of compliance and a comment is required to fully explain the circumstances that caused the late certification, including the steps that will be taken to avoid late certifications in the future.
- OverdueCertificationExistingCommentMessage- You have already entered a comment... please edit this comment as needed to explain the late certification.
- AtlSearchFilterLabel- Only show effort reports when the searched departments has accounts in the sponsored projects section

Interface Process Changes

There are no interface process changes with this release.

Database Changes

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

- A new column, CTO_FILTER, has been added to ERSCOMPRPTPARAMS table.
- A new column, ATL_SEARCH_IND, has been added to ERSCRITERIAMASTER table.
- Database view, ERSCntCertRptsByUser, has been modified.
- A new database view, ERSCertDistDetailReport, has been created.

See the ERS_R10.7_UPGRADE... script corresponding to your DBMS 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 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 or contact one the following persons:

Name	Email	Phone
Steve Hunter	steve.hunter@ucop.edu	(510) 987-0138
Sundar Thiru	sundar.thiru@ucop.edu	(510) 987-0435
Rajeev Gupta	rajeev.gupta@ucop.edu	(510) 987-9695
Nancy Field	nancy.field@ucop.edu	(510) 987-0831