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Re: Effort Reporting System – Base Release 10.8

We are pleased to announce the availability of Release 10.8 of the base Effort Reporting System. This release includes 4 enhancements and 7 bug fixes.

- This release includes the following enhancements:

    o 2834 – Retain the 1% tolerance rule for on-line transactions.

       Conditionally apply the 1% tolerance rule for on-line transaction for retaining report certifications. This applies to reports marked for multiple line certifications only.

    o 3030 – Systematically correct unrecognized earnings.

       Identify effort reports with unrecognized earnings during the processing of an FS interface file and systematically correct those reports. Only "open" effort reports are corrected. FS interface job has been modified to cache all unrecognized earnings and create a late pay table record for any effort report which needs to be rebuilt due to a new FAU. Regular late pay processing job will process and rebuild these effort reports.

    o 3036 – Provide campuses the ability to configure default search tabs.

       Two new config level options have been added to enable campuses to specify the default tabs when a user goes to "Search Reports" page.

       1. search-default-tab - This enables campuses to specify the default search tab among the five available tabs. This config option is optional. The valid values are between 1 and 5.

2. dept-search-default-selection - This enables campuses to specify the default department type for department based search tab. This config option is optional. The valid values are between 1 and 3.

○ 3049 – Provide "Location Filter" for generating compliance reports at campus level.

A new config level option has been added to enable campuses use location filter for generating compliance reports.

"use-location-filter" - This enables campuses to turn on location filter. This config option is optional. The valid values are "true" or "false" (default).

The following reports may be run, at the campus level, using the location filter:

- Effort Report Status report
- Multiple Certification report
- Not-self Certified report

A new interface file has been defined to load location code/name entries.

- In addition, this release fixes the following bugs:

○ 1156 – Drill-down export uses latest report version's earnings, not current version

The "View Payroll Details" button on the top of the screen has been corrected to show the payroll details pertaining to the current version of the effort report.

○ 2471 – Sponsored project line item zeroed out but payroll detail shows non-zero calculated amount

The late pay logic has been changed to retain the actual calculated amounts.

○ 2946 – Character filtering incorrect solution for untrusted data management

The user input scrubbing logic for special characters has been removed. This has been replaced with Strut's supplied functions to escape any hazardous characters.

○ 3040 – Make myCertifications as the default search

For a new PI user, the default search has been changed to myCertifications. If the myCertifications list is created for the first time, the default will be changed to myCertifications as well.

○ 3083 – Edit user screen fails if employee id greater than 9 characters

A new validation is now in place to check for employee id length on edit user screen.

○ 3119 – User unable to login if employee id is missing for a subscribed search

ERS users were unable to log on to the system when the ERSUSER record for owner of one of the subscribed searches was missing the employee Id.

○ 3129 – Blank message log when only one log message

When there is only one log message to be displayed, the system displays a blank screen. Also, the user is unable to change the selection criteria to view other messages.

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 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* - Three new config options have been added
- *ERS Installation Guide* – This guide has been updated to include the new interface file, related job and database changes.
- *ERS Interface Specification* – A new interface, Location code interface file, has been added.
- *ERS 10.8 Design* – A new detail design document is being created for each ERS release.

Configuration Files

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

- Use-location-filter

  This option enables campuses to specify whether or not location filter will be available as a filter for generating compliance reports. The valid values are:

  - true – Show location filter
  - false – Do not show location filter (default)

- search-default-tab

  This option enables campuses to specify the default search tab among the five available tabs on "Search Reports" panel. Valid values are:

  - 1 - People based search (default)
  - 2 - Departments based search
  - 3 - Projects based search
  - 4 - Awards based search
  - 5 - FAUs based search

- dept-search-default-selection

  This option enables campuses to specify the default department type for department based search tab. The valid values are:

  - 1 - Home Department based search (default)
  - 2 - Account Department based search
  - 3 - Fund Department based search

Interface Process Changes

A new, Location code interface file has been added. This interface is optional and should be used along with enabling "Location filter" for compliance reports. Please see ERS Interface Specification guide for more information.

Database Changes

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

- A new table, ERSLOCATIONCODE, has been added to store location information.

- A new column, LOCATION_FILTER, has been added to ERSCOMPRPTPARAMS table.

- A new column, REASON_CODE, has been added to ERSLATEPAY table. The new column should be initialized to value "LP" for all existing records.

- Database view, ERSHomeDeptStatusReport, has been modified.

- ERSVersion table record has been updated to 10.8

See the ERS_R10.8_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:

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