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Re: Effort Reporting System – Base Release 10.9

We are pleased to announce the availability of Release 10.9 of the base Effort Reporting System. This release includes 3 enhancements and 13 bug fixes.

- This release includes the following enhancements:
 - 2822 – Remove the HTML versions of compliance reports.

Over the previous few releases, the Excel and PDF versions of the compliance reports have been significantly enhanced making the HTML version maintenance unnecessary. The HTML version of the report is being removed from this release onwards.
 - 3091 – Allow for removing an account PI from the associated project.

The account PI interface has been changed to add a new field - action code. This field will be used to unflag (delete) a PI flagged as account PI for a particular project. Please refer to “interface file specifications” document for the new file format.

In addition, a new config option has been added to indicate if the campus is enforcing "one account PI per project" rule. If this rule is enforced, the application will automatically unflag any existing PI as account PI when adding a new account PI for a project.

Clean-up bad data: Since account PI function did not provide for unflagging an account PI, there may be some unwanted account PI associations in the database. Please refer to “Bugzilla3091Clean up.txt” for correcting the incorrect data.

- 3234 – Automate INTF notifications to be sent out every day.

Currently notification dispatcher is run on a request basis and sends out all pending notifications. This process has been enhanced to send out specific notifications based on event code. The intention is to run the notification dispatcher on a daily basis for INTF (interface file processing) for timely notifications to users related to interface file processing.

- In addition, this release fixes the following bugs:

- 1632 – FS interface process does not set the start date for the funding source record. The FS interface has been corrected to populate the start date as current system date when adding a new funding source.

- 1886 – Apply HTML escape to all appropriate output fields in the system administration modules.

For security consideration, HTML escape has been applied for all appropriate output fields in the system administration modules. The non-administration modules were covered in the previous release.

- 2194 – Issue an error message if user attempts to certify an already certified report. If a user tries to certify an already certified report, the user will now get a pop-up warning message that the report is already certified.
- 2489 – Effort report status at summary level and campus level does not calculate percentage of reports on time correctly.

The reports with status “Adjustment Required” are now excluded from the “total reports” used in the calculation of percentage of reports on time.

- 3027 – Remove “Required” as one of the statuses available for selection from the drop-down on the report list page.

From the statuses available for selection from the drop-down list on the report list page, “required” option has been removed. This option is internal to the application.

- 3043 – “Certify Effort Report” button not dimmed and disabled in certain cases. “Certify Effort Report” button was not dimmed when report is in multi-line certification mode or when report has unsaved data. The button is dimmed and disabled under these two cases now.
- 3046 – Remove “Reopen Effort Report” button from the “Comment Log” screen. “Reopen Effort Report” button has been removed from “Comment Log” screen.
- 3100 – System loses original certifier when a report is changed from “certified/adjustment required” to “certified”.

This has been corrected and the system will carry forward the original certifier user id and name to the "certified" version of the report.

- 3117 – Externalize “Service Period” label to allow for campus specific label on the report view/edit page

A new externalized field label, <ServicePeriodLabel>, has been added.

- 3118 – Remove system inbuilt searches when the employee id is removed or changed for an ERS user.

The system inbuilt searches, myProjects and myCertifications, are associated with an employee id. These searches will now be deleted if the employee id is changed for a user.

- 3135 – System builtin searches are not created if the user has subscribed to other PI's myProjects or myCertifications searches.

If a user has subscribed to other PI's searches, application may not build that user's searches. This has been corrected.

- 3180 – External authentication redirection for error page not working.

In case of external authentication, when a user is not authorized to use ERS, the application does not correctly redirect user to the right error page.

- 3233 – Certifier name shows as “null” if missing

Certifier name on the Not Self-Certified report shows as “null” if missing. This has been corrected to display blanks.

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* – One new config options and one new externalized string have been added
- *ERS Installation Guide* – No changes.
- *ERS Interface Specification* – Account PI interface file record layout has been changed.
- *ERS 10.9 Design* – This is the design document for changes pertaining to this ERS release.

Configuration Files

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

- one-account-pi-per-project

This option enables campuses to bypass the “one account PI per project” rule when processing Account PI interface file.

- true – enforce one account PI per project rule (default)

- false – do not enforce one account PI per project rule

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

- ServicePeriodLabel

This string defines the label for the “Service Period” on the view/edit report page. The supplied value with the application is “Service Period”.

Interface Process Changes

Account PI interface file layout has been changed to add “action code” field. This allows campuses to unflag a PI as account PI for a particular project. Please see ERS Interface Specification guide for more information.

Database Changes

There are no database structure changes with this release. The only change is:

- ERSVersion table record has been updated to 10.9

See the ERS_R10.9_UPGRADE... script corresponding to your DBMS vendor for details.

With this release, the DB2 driver files supplied with the application have been upgraded to V9.7.

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.

Release Sunset

With this release, ERS is retiring support for release 10.7. Base ERS will no longer release any fixes or enhancements to this release.

If there are any questions, please email ~IRC-BASEERS@ucop.edu or contact Rajeev Gupta at rajeev.gupta@ucop.edu or (510) 987-9695.

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