

Updated: 07-08-2026

GET /v2/export/app/allFaculty/annualCertification/:fiscal_year

Proc: oats::ws_faculty::export::v2::get_faculty_annual_certifications_in_fiscal_year

Description: Retrieves a pre-generated snapshot of all faculty annual certifications for a given fiscal year. Returns a flat list where each entry represents one faculty member's certification record for the specified fiscal year, including their status, due date, submission date, and owe-to-plan calculation.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v2/export/app/allFaculty/annualCertification/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

{

```
"snapshotDate": "07/01/2025 03:00:00",
"campusCode": "UCLA",
"fiscalYear": "2024-2025",
"facultyList": [
  {
    "ucPathID": "80012345",
    "email": "jsmith@university.edu",
    "firstName": "Jane",
    "lastName": "Smith",
    "formStatus": "Accepted",
    "queueLabel": "",
    "policyName": "APM-025",
    "primaryUnitCode": "DEPTX",
    "primaryUnitTitle": "Department of Computer Science",
    "submittedDate": "10/15/2024",
    "dueDate": "10/31/2024",
    "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
    "oweToPlan": "3,500.00"
  },
  {
    "ucPathID": "80067890",
    "email": "jdoe@university.edu",
    "firstName": "John",
```

```
"lastName": "Doe",
"formStatus": "Not Submitted",
"queueLabel": "Faculty",
"policyName": "APM-025",
"primaryUnitCode": "DEPTY",
"primaryUnitTitle": "Department of Mathematics",
"submittedDate": "",
"dueDate": "10/31/2024",
"secondaryUnitCodeList": [],
"oweToPlan": "0"
},
{
"ucPathID": "80011111",
"email": "awhite@university.edu",
"firstName": "Alice",
"lastName": "White",
"formStatus": "In Process",
"queueLabel": "Department Chair",
"policyName": "APM-025",
"primaryUnitCode": "DEPTX",
"primaryUnitTitle": "Department of Computer Science",
"submittedDate": "10/20/2024",
"dueDate": "10/31/2024",
```

```
"secondaryUnitCodeList": ["DEPTZ"],
"oweToPlan": "0"
}
]
}
```

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
fiscalYear	string	Fiscal year range (e.g., "2024-2025")
facultyList	array	Array of faculty certification objects

Faculty Certification Object

Field	Type	Description
ucPathID	string	UCPath identifier
email	string	Faculty member email address
firstName	string	Faculty member first name
lastName	string	Faculty member last name

Field	Type	Description
formStatus	string	Certification status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
policyName	string	Applicable policy number (e.g., "APM-025")
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
submittedDate	string	Date last submitted (empty if not submitted)
dueDate	string	Certification deadline date (MM/DD/YYYY)
secondaryUnitCodeList	array	List of secondary unit codes
oweToPlan	string	Amount owed to plan; 0 if income reporting is disabled or total income does not exceed threshold

Differences from v1 (GET /v1/export/app/allFaculty/annualCertification/:fiscal_year)

Aspect	v1	v2	Description
Unique implementation	✓	✗	v2 delegates entirely to the v1 proc with -version "v1"
Parameters	✓	✓	Identical
Response format	✓	✓	Identical

Aspect	v1	v2	Description
Response fields	✓	✓	Identical
Snapshot source	✓	✓	Both read from the same "Faculty Annual Certifications v1 List Snapshot" folder
Behavior	✓	✓	Identical

There are no functional differences. The v2 proc directly calls `oats::ws_faculty::export::v1::get_faculty_annual_certifications_in_fiscal_year` with `-version "v1"`, meaning both endpoints read from the same v1 snapshot files. The response structure, fields, and data are identical.

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{  
  "response_code": "Error",  
  "response_message": "Data Not Found",  
  "response_body": ""  
}
```

Site report configuration error:

```
{
```

```
"response_code": "Error",
"response_message": "Could not get information from ucoats-site-report package",
"response_body": ""
}
```

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated daily by the scheduled `proc ucoats::report::v1::generate_faculty_annual_certifications_snapshot`.
 - The v2 proc explicitly passes `-version "v1"` to the v1 proc, so both v1 and v2 endpoints serve the same snapshot data from the same folder.
 - Snapshots are generated for the last 10 fiscal years from the current fiscal year.
 - The response is delivered as a file download (`ad_return_string_as_file`) with MIME type `json`.
 - The `formStatus` is derived from the workflow state: `"pending" → "Not Submitted"`, `"approved" → "Accepted"`, all other states → `"In Process"`.
 - When status is `"Not Submitted"`, the `submittedDate` is returned as empty.
 - The `oweToPlan` calculation: if income reporting is not enabled or total income does not exceed the income threshold, the value is 0. Otherwise it equals `total_income - income_threshold`, formatted to two decimal places.
-

Updated: 07-08-2026

GET /v2/export/app/batch/faculty/activity/:fiscal_year

Proc: `oats::ws_faculty::export::v2::get_faculty_activities_in_fiscal_year`

Description: Retrieves a pre-generated snapshot of all faculty members with their outside activities for a given fiscal year. Version 2 adds activity metadata (ID, type list, organization name, organization type, creation date) and the primary unit title. This is a mid-level export — more detailed than the faculty list but without the individual effort/income line items provided by the effort endpoint.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v2/export/app/batch/faculty/activity/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

```
{  
  "snapshotDate": "07/01/2025 03:00:00",  
  "campusCode": "UCLA",  
  "facultyCount": "85",  
  "facultyList": [  
    ...  
  ]  
}
```

```
{
  "firstName": "Jane",
  "lastName": "Smith",
  "email": "jsmith@university.edu",
  "UID": "123456789",
  "UCPathID": "80012345",
  "employmentStatus": "A",
  "separationDate": "",
  "primaryUnitCode": "DEPTX",
  "primaryUnitTitle": "Department of Computer Science",
  "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
  "facultyStatusTagList": ["notInGoodStanding"],
  "policyName": "APM-025",
  "timeThreshold": "48",
  "incomeThreshold": "25,000.00",
  "activityList": [
    {
      "activityID": "5001",
      "label": "Consulting for Acme Corp",
      "category": "cat1",
      "activityTypeList": ["Consulting", "Board Membership"],
      "organizationName": "Acme Corporation",
      "type": "For-Profit",
```

```
"creationDate": "2024-08-15",
"timeEntered": "120.00",
"timeAgainstTh": "100.00",
"timeOverTH": "20.00",
"incomeEntered": "18,000.00",
"incomeAgainstTh": "15,000.00",
"incomeOverTh": "5,000.00",
"formList": [
  {
    "formID": "8001",
    "Form": "cat1",
    "formStatus": "Accepted",
    "queueLabel": "",
    "lastUpdated": "09/01/2024"
  }
],
{
  "activityID": "5002",
  "label": "Board Member at Tech Foundation",
  "category": "cat1",
  "activityTypeList": ["Board Membership"],
  "organizationName": "Tech Foundation",
```

```
"type": "Non-Profit",
"creationDate": "2024-09-01",
"timeEntered": "40.00",
"timeAgainstTh": "40.00",
"timeOverTH": "",
"incomeEntered": "5,000.00",
"incomeAgainstTh": "5,000.00",
"incomeOverTh": "",
"formList": [
  {
    "formID": "8002",
    "Form": "cat1",
    "formStatus": "In Process",
    "queueLabel": "Department Chair",
    "lastUpdated": "10/15/2024"
  }
]
}
```

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
facultyCount	string	Total number of faculty in the response
facultyList	array	Array of faculty objects

Faculty Object

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
UID	string	Campus UID
UCPathID	string	UCPath identifier
employmentStatus	string	"A" (Active) or "S" (Separated)
separationDate	string	Date of separation (empty if active)
primaryUnitCode	string	Primary department/unit code

Field	Type	Description
primaryUnitTitle	string	Primary department/unit title
secondaryUnitCodeList	array	List of secondary unit codes
facultyStatusTagList	array	Status tags (e.g., "notInGoodStanding", "onleave")
policyName	string	Applicable policy number (e.g., "APM-025")
timeThreshold	string	Time threshold in hours for the fiscal year
incomeThreshold	string	Income threshold amount for the fiscal year
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
activityID	string	Unique activity identifier
label	string	Activity title/name
category	string	Activity category type (e.g., "cat1")
activityTypeList	array	List of activity type labels
organizationName	string	Name of the external organization
type	string	Organization type (e.g., "For-Profit", "Non-Profit")

Field	Type	Description
creationDate	string	Date the activity was created
timeEntered	string	Total hours reported (all effort entries)
timeAgainstTh	string	Hours counted against the threshold
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income reported (all effort entries)
incomeAgainstTh	string	Income counted against the threshold
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
formList	array	Array of approval form objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1", "exceed_th")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
lastUpdated	string	Date of last status update (MM/DD/YYYY)

Differences from v1 (GET /v1/export/app/batch/faculty/activity/:fiscal_year)

Faculty Object

Field	v1	v2	Description
primaryUnitTitle	✗	✓	Human-readable title of the primary unit

Activity Object

Field	v1	v2	Description
activityID	✗	✓	Unique activity identifier
activityTypeList	✗	✓	List of activity type labels
organizationName	✗	✓	Name of the external organization
type	✗	✓	Organization type name (e.g., "For-Profit")
creationDate	✗	✓	Date the activity was created

All other fields, parameters, validation rules, error responses, and behavior remain identical between v1 and v2.

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""
```

```
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{
```

```
"response_code": "Error",
```

```
"response_message": "Data Not Found",
```

```
"response_body": ""
```

```
}
```

Site report configuration error:

```
{
```

```
"response_code": "Error",
```

```
"response_message": "Could not get information from ucoats-site-report package",
```

```
"response_body": ""
```

```
}
```

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated weekly by the scheduled `proc ucoats::report::v2::generate_faculty_activity_snapshot`.
- Snapshots are generated for the last 10 fiscal years from the current fiscal year.
- The response is delivered as a file download (`ad_return_string_as_file`) with MIME type `json`.
- The `fiscal_year` value stored internally uses only the start year (e.g., 2024 for fiscal year 2024-2025).
- The `v2` proc delegates to `oats::ws_faculty::export::v1::get_faculty_activities_in_fiscal_year` with `-version "v2"`, which reads from the "Faculty Activities v2 List Snapshot" folder.
- This endpoint provides two levels of time/income data per activity: `timeEntered/incomeEntered` (total reported) and `timeAgainstTh/incomeAgainstTh` (amounts counted against the policy threshold).

- Unlike the effort endpoint (/batch/facultyActivityEffort/), this endpoint does not include individual income/effort line items (incomeEffortList).

Updated: 07-08-2026

GET /v2/export/app/batch/facultyActivityEffort/:fiscal_year

Proc: oats::ws_faculty::export::v2::get_faculty_activities_effort_in_fiscal_year

Description: Retrieves a pre-generated snapshot of all faculty members with their outside activities and detailed effort/income entries for a given fiscal year. Version 2 adds activity metadata (ID, type list, organization name, organization type, creation date), the primary unit title, and restructures the amountAgainstThreshold field to the income/effort entry level.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v2/export/app/batch/facultyActivityEffort/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

```
{
  "snapshotDate": "07/01/2025 03:00:00",
  "campusCode": "UCLA",
  "facultyCount": "85",
  "facultyList": [
    {
      "firstName": "Jane",
      "lastName": "Smith",
      "email": "jsmith@university.edu",
      "UID": "123456789",
      "UCPathID": "80012345",
      "employmentStatus": "A",
      "separationDate": "",
      "primaryUnitCode": "DEPTX",
      "primaryUnitTitle": "Department of Computer Science",
      "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
      "facultyStatusTagList": ["notInGoodStanding"],
      "policyName": "APM-025",
      "timeThreshold": "48",
      "incomeThreshold": "25,000.00",
```

```
"activityList": [  
  {  
    "activityID": "5001",  
    "label": "Consulting for Acme Corp",  
    "category": "cat1",  
    "activityTypeList": ["Consulting", "Board Membership"],  
    "organizationName": "Acme Corporation",  
    "type": "For-Profit",  
    "creationDate": "2024-08-15",  
    "timeEntered": "120.00",  
    "timeAgainstTh": "100.00",  
    "timeOverTH": "20.00",  
    "incomeEntered": "18,000.00",  
    "incomeAgainstTh": "15,000.00",  
    "incomeOverTh": "5,000.00",  
    "formList": [  
      {  
        "formID": "8001",  
        "Form": "cat1",  
        "formStatus": "Accepted",  
        "queueLabel": "",  
        "lastUpdated": "09/01/2024"  
      }  
    ]  
  }  
]
```

],

"incomeEffortList": [

{

"remunerationType": "Honorarium",

"stockInfo": {},

"numHours": "40.00",

"startDate": "07/01/2024",

"isPodiumHours": "No",

"endDate": "09/30/2024",

"isCompensated": "Yes",

"Amount": "5,000.00",

"amountAgainstThreshold": "5,000.00"

},

{

"remunerationType": "Stock as Compensation",

"stockInfo": {

"numShares": "100",

"receiptDate": "08/15/2024",

"pricePerShareAtTimeOfReceipt": "50.00"

},

"numHours": "0.00",

"startDate": "08/01/2024",

"isPodiumHours": "No",

```
"endDate": "08/31/2024",
"isCompensated": "Yes",
"Amount": "5,000.00",
"amountAgainstThreshold": "5,000.00"
}
]
}
]
}
]
}
```

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
facultyCount	string	Total number of faculty in the response
facultyList	array	Array of faculty objects

Faculty Object

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
UID	string	Campus UID
UCPathID	string	UCPath identifier
employmentStatus	string	"A" (Active) or "S" (Separated)
separationDate	string	Date of separation (empty if active)
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
secondaryUnitCodeList	array	List of secondary unit codes
facultyStatusTagList	array	Status tags (e.g., "notInGoodStanding", "onleave")
policyName	string	Applicable policy number (e.g., "APM-025")
timeThreshold	string	Time threshold in hours for the fiscal year
incomeThreshold	string	Income threshold amount for the fiscal year
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
activityID	string	Unique activity identifier
label	string	Activity title/name
category	string	Activity category type (e.g., "cat1")
activityTypeList	array	List of activity type labels
organizationName	string	Name of the external organization
type	string	Organization type (e.g., "For-Profit")
creationDate	string	Date the activity was created
timeEntered	string	Total hours reported (all effort entries)
timeAgainstTh	string	Hours counted against the threshold
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income reported (all effort entries)
incomeAgainstTh	string	Income counted against the threshold
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
formList	array	Array of approval form objects
incomeEffortList	array	Array of individual income/effort entry objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1", "exceed_th")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
lastUpdated	string	Date of last status update (MM/DD/YYYY)

Income/Effort Entry Object

Field	Type	Description
renumerationType	string	Type of compensation (e.g., "Honorarium", "Stock as Compensation", "Stock Purchase Agreement", "Stock Options")
stockInfo	object	Stock-specific details (empty object {} for non-stock types)
numHours	string	Hours reported for this entry
startDate	string	Effort period start date (MM/DD/YYYY)
isPodiumHours	string	Whether hours are podium hours ("Yes"/"No")
endDate	string	Effort period end date (MM/DD/YYYY)
isCompensated	string	Whether the effort is compensated ("Yes"/"No")
Amount	string	Income amount reported for this entry

Field	Type	Description
amountAgainstThreshold	string	Income amount counted against the threshold for this entry

stockInfo Object (varies by remunerationType)

Stock as Compensation:

Field	Type	Description
numShares	string	Number of shares received
receiptDate	string	Date shares were received
pricePerShareAtTimeOfReceipt	string	Share price at time of receipt

Stock Purchase Agreement:

Field	Type	Description
purchaseDate	string	Date of stock purchase
purchasePricePerShare	string	Price per share at purchase
fairMarketValueAtTimeOfPurchase	string	Fair market value at purchase time

Stock Options:

Field	Type	Description
numShares	string	Number of option shares
optionOfferDate	string	Date options were offered

Field	Type	Description
exercisePricePerShare	string	Exercise price per share
fairMarketValueAtTimeOfDisclosure	string	Fair market value at disclosure

Differences from v1 (GET /v1/export/app/batch/facultyActivityEffort/:fiscal_year)

Faculty Object

Field	v1	v2	Description
primaryUnitTitle	✗	✓	Human-readable title of the primary unit

Activity Object

Field	v1	v2	Description
activityID	✗	✓	Unique activity identifier
activityTypeList	✗	✓	List of activity type labels
organizationName	✗	✓	Name of the external organization
type	✗	✓	Organization type name (e.g., "For-Profit")
creationDate	✗	✓	Date the activity was created

Income/Effort Entry Object

Field	v1	v2	Description
amountAgainstThreshold	✗	✓	Income amount counted against threshold (at the entry level)

stockInfo — Stock Purchase Agreement

Field	v1	v2	Description
amountAgainstThreshold	✓	✗	Moved from stockInfo to the parent income/effort entry level in v2

stockInfo — Stock Options

Field	v1	v2	Description
amountAgainstThreshold	✓	✗	Moved from stockInfo to the parent income/effort entry level in v2

Error Responses

Invalid fiscal year range:

```
{
  "response_code": "Error",
  "response_message": "Fiscal Year range not valid",
  "response_body": ""
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{
  "response_code": "Error",
  "response_message": "Data Not Found",
```

```
"response_body": ""
```

```
}
```

Site report configuration error:

```
{
```

```
"response_code": "Error",
```

```
"response_message": "Could not get information from ucoats-site-report package",
```

```
"response_body": ""
```

```
}
```

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated weekly by the scheduled `proc ucoats::report::v2::generate_faculty_activity_effort_snapshot`.
- Snapshots are generated for the last 10 fiscal years from the current fiscal year.
- The response is delivered as a file download (`ad_return_string_as_file`) with MIME type `json`.
- The `fiscal_year` value stored internally uses only the start year (e.g., 2024 for fiscal year 2024-2025).
- The v2 proc delegates to `oats::ws_faculty::export::v1::get_faculty_activities_effort_in_fiscal_year` with `-version "v2"`, which reads from the "Faculty Activities Effort v2 List Snapshot" folder.
- In v2, the `amountAgainstThreshold` is normalized to the income/effort entry level for all compensation types, rather than being nested inside `stockInfo` for stock types. This provides a consistent structure across all remuneration types.

Updated: 07-08-2026

GET /v2/export/app/faculty/:fiscal_year

Proc: oats::ws_faculty::export::v2::get_faculty_in_fiscal_year

Description: Retrieves a pre-generated snapshot of all faculty members for a given fiscal year. The data is generated daily and served from a stored JSON file. Version 2 adds the primary unit title field to each faculty record.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v2/export/app/faculty/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

```
{  
  "snapshotDate": "07/01/2025 03:00:00",  
  "campusCode": "UCLA",
```

```
"facultyList": [  
  {  
    "firstName": "Jane",  
    "lastName": "Smith",  
    "email": "jsmith@university.edu",  
    "policyName": "APM-025",  
    "UCPathID": "80012345",  
    "facultyTagList": ["notInGoodStanding", "onleave"],  
    "employmentStatus": "A",  
    "primaryUnitCode": "DEPTX",  
    "primaryUnitTitle": "Department of Computer Science",  
    "secondaryUnitCodeList": ["DEPTY", "DEPTZ"]  
  },  
  {  
    "firstName": "John",  
    "lastName": "Doe",  
    "email": "jdoe@university.edu",  
    "policyName": "APM-025",  
    "UCPathID": "80067890",  
    "facultyTagList": [],  
    "employmentStatus": "A",  
    "primaryUnitCode": "DEPTY",  
    "primaryUnitTitle": "Department of Mathematics",
```

```
"secondaryUnitCodeList": []
}
]
}
```

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
facultyList	array	Array of faculty objects

Faculty Object

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
policyName	string	Applicable policy number (e.g., "APM-025")
UCPathID	string	UCPath identifier

Field	Type	Description
facultyTagList	array	Status tags (e.g., "notInGoodStanding", "onleave"); empty array if none apply
employmentStatus	string	"A" (Active) or "S" (Separated)
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
secondaryUnitCodeList	array	List of secondary unit codes

Differences from v1 (GET /v1/export/app/faculty/:fiscal_year)

Field	v1	v2	Description
primaryUnitTitle	✗	✓	Human-readable title of the primary department/unit

All other fields, parameters, validation rules, error responses, and behavior remain identical between v1 and v2.

Error Responses

Invalid fiscal year range:

```
{
  "response_code": "Error",
  "response_message": "Fiscal Year range not valid",
  "response_body": ""
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{  
  "response_code": "Error",  
  "response_message": "Data Not Found",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated daily by the scheduled proc `ucoats::report::v2::generate_faculty_snapshot`.
 - Snapshots are generated for the last 10 fiscal years from the current fiscal year.
 - The response is delivered as a file download (`ad_return_string_as_file`) with MIME type `json`.
 - The `fiscal_year` value stored internally uses only the start year (e.g., 2024 for fiscal year 2024-2025).
 - The v2 proc delegates to `oats::ws_faculty::export::v1::get_faculty_in_fiscal_year` with `-version "v2"`, which reads from the "Faculty v2 List Snapshot" folder instead of the v1 folder.
 - The `facultyTagList` is dynamically built during snapshot generation: `"notInGoodStanding"` is added when the faculty is not in good standing, and `"onleave"` is added when the faculty has leave to engage in outside activity.
-

Updated: 07-08-2026

GET /v2/export/app/faculty/AnnualCertifications/email/:email

Proc: oats::ws_faculty::export::v2::get_annual_certification_by_email

Description: Retrieves the list of Annual Certifications for a faculty member, identified by their email address. Returns the faculty's basic identifying information along with all their annual certification records across fiscal years, including certification status, due dates, and owe-to-plan calculations.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
email	path	yes	The email address of the faculty member (e.g., jsmith@university.edu).

How to Call

GET /v2/export/app/faculty/AnnualCertifications/email/jsmith@university.edu

Authorization: Bearer <token>

Response

Content-Type: application/json

Success (HTTP 200):

```
{  
  "response_code": "Ok",  
  "response_message": "ws annual certification list run successfully",
```

```
"response_body": {
  "annualCertificationData": {
    "facultyInfo": {
      "UID": "123456789",
      "UCPathID": "80012345",
      "firstName": "Jane",
      "lastName": "Smith"
    },
    "annualCertificationList": [
      {
        "primaryUnitCode": "DEPTX",
        "primaryUnitTitle": "Department of Computer Science",
        "policyName": "APM-025",
        "fiscalYear": "2024",
        "status": "Approved",
        "dueDate": "10/31/2024",
        "submittedDate": "10/15/2024",
        "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
        "oweToPlan": "3,500.00"
      },
      {
        "primaryUnitCode": "DEPTX",
        "primaryUnitTitle": "Department of Computer Science",
```

```
"policyName": "APM-025",
"fiscalYear": "2023",
"status": "Approved",
"dueDate": "10/31/2023",
"submittedDate": "10/20/2023",
"secondaryUnitCodeList": ["DEPTY"],
"oweToPlan": "0"
},
{
  "primaryUnitCode": "DEPTX",
  "primaryUnitTitle": "Department of Computer Science",
  "policyName": "APM-025",
  "fiscalYear": "2025",
  "status": "Not Submitted",
  "dueDate": "10/31/2025",
  "submittedDate": "",
  "secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
  "oweToPlan": "0"
}
]
}
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message
response_body	object	Contains the annualCertificationData object

annualCertificationData Object

Field	Type	Description
facultyInfo	object	Basic faculty identification data
annualCertificationList	array	Array of annual certification objects

facultyInfo Object

Field	Type	Description
UID	string	Campus UID
UCPathID	string	UCPath identifier
firstName	string	Faculty member first name
lastName	string	Faculty member last name

Annual Certification Object

Field	Type	Description
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
policyName	string	Applicable policy number (e.g., "APM-025")
fiscalYear	string	Fiscal year for this certification
status	string	Certification status: "Approved", "Not Submitted", or "In Process"
dueDate	string	Certification deadline date (MM/DD/YYYY)
submittedDate	string	Date last submitted (empty if not submitted)
secondaryUnitCodeList	array	List of secondary unit codes
oweToPlan	string	Amount owed to plan; 0 if income reporting is disabled or total income does not exceed threshold

Differences from v1 (GET /v1/export/app/faculty/AnnualCertifications/email/:email)

Aspect	v1	v2	Description
Unique implementation	✓	✗	v2 delegates entirely to the v1 proc
Parameters	✓	✓	Identical
Response format	✓	✓	Identical

Aspect	v1	v2	Description
Response fields	✓	✓	Identical
Behavior	✓	✓	Identical

There are no functional differences. The v2 proc (oats::ws_faculty::export::v2::get_annual_certification) directly calls oats::ws_faculty::export::v1::get_annual_certification without modification. The response structure, fields, and logic are identical between versions.

Error Responses

Faculty not found by email:

```
{  
  "response_code": "Error",  
  "response_message": "No matching faculty with Email = jsmith@university.edu in UCOATS",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint performs a live database query each time it is called.

- The v2 proc delegates directly to oats::ws_faculty::export::v1::get_annual_certification — there is no v2-specific logic.
- The certification status is derived from the workflow state: "pending" → "Not Submitted", "approved" → "Approved", all other states → "In Process".
- When status is "Not Submitted", the submittedDate is returned as empty.
- The oweToPlan calculation: if income reporting is not enabled or total income does not exceed the income threshold, the value is 0. Otherwise it equals total_income - income_threshold, formatted to two decimal places.
- The response includes certifications across all fiscal years available for the faculty member.

Updated: 07-08-2026

GET /v2/export/app/faculty/AnnualCertifications/ucpathID/:ucpath_id

Proc: oats::ws_faculty::export::v2::get_annual_certification_by_ucpath_id

Description: Retrieves the list of Annual Certifications for a faculty member, identified by their UCPath ID. Returns the faculty's basic identifying information along with all their annual certification records across fiscal years, including certification status, due dates, and owe-to-plan calculations.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
ucpath_id	path	yes	The UCPath ID of the faculty member (e.g., 80012345).

How to Call

GET /v2/export/app/faculty/AnnualCertifications/ucpathID/80012345

Authorization: Bearer <token>

Response

Content-Type: application/json

Success (HTTP 200):

```
{
  "response_code": "Ok",
  "response_message": "ws annual certification list run successfully",
  "response_body": {
    "annualCertificationData": {
      "facultyInfo": {
        "UID": "123456789",
        "UCPathID": "80012345",
        "firstName": "Jane",
        "lastName": "Smith"
      },
      "annualCertificationList": [
        {
          "primaryUnitCode": "DEPTX",
          "primaryUnitTitle": "Department of Computer Science",
          "policyName": "APM-025",
          "fiscalYear": "2024",
          "status": "Approved",
          "dueDate": "10/31/2024",
```

```
"submittedDate": "10/15/2024",
"secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
"oweToPlan": "3,500.00"
},
{
"primaryUnitCode": "DEPTX",
"primaryUnitTitle": "Department of Computer Science",
"policyName": "APM-025",
"fiscalYear": "2023",
"status": "Approved",
"dueDate": "10/31/2023",
"submittedDate": "10/20/2023",
"secondaryUnitCodeList": ["DEPTY"],
"oweToPlan": "0"
},
{
"primaryUnitCode": "DEPTX",
"primaryUnitTitle": "Department of Computer Science",
"policyName": "APM-025",
"fiscalYear": "2025",
"status": "Not Submitted",
"dueDate": "10/31/2025",
"submittedDate": ""
```

```
"secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
"oweToPlan": "0"
}
]
}
}
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message
response_body	object	Contains the annualCertificationData object

annualCertificationData Object

Field	Type	Description
facultyInfo	object	Basic faculty identification data
annualCertificationList	array	Array of annual certification objects

facultyInfo Object

Field	Type	Description
UID	string	Campus UID
UCPathID	string	UCPath identifier
firstName	string	Faculty member first name
lastName	string	Faculty member last name

Annual Certification Object

Field	Type	Description
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
policyName	string	Applicable policy number (e.g., "APM-025")
fiscalYear	string	Fiscal year for this certification
status	string	Certification status: "Approved", "Not Submitted", or "In Process"
dueDate	string	Certification deadline date (MM/DD/YYYY)
submittedDate	string	Date last submitted (empty if not submitted)
secondaryUnitCodeList	array	List of secondary unit codes
oweToPlan	string	Amount owed to plan; 0 if income reporting is disabled or total income does not exceed threshold

Differences from v1 (GET /v1/export/app/faculty/AnnualCertifications/ucpathID/:ucpath_id)

Aspect	v1	v2	Description
Unique implementation	✓	✗	v2 delegates entirely to the v1 proc
Parameters	✓	✓	Identical
Response format	✓	✓	Identical
Response fields	✓	✓	Identical
Behavior	✓	✓	Identical

There are no functional differences. The v2 proc (oats::ws_faculty::export::v2::get_annual_certification) directly calls oats::ws_faculty::export::v1::get_annual_certification without modification. The response structure, fields, and logic are identical between versions.

Error Responses

Faculty not found by UCPath ID:

```
{  
  "response_code": "Error",  
  "response_message": "No matching faculty with UCPath ID = 80012345 in UCOATS",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
}
```

```
"response_body": ""
```

```
}
```

Notes

- This endpoint performs a live database query each time it is called.
 - The v2 proc delegates directly to `oats::ws_faculty::export::v1::get_annual_certification` — there is no v2-specific logic.
 - The certification status is derived from the workflow state: "pending" → "Not Submitted", "approved" → "Approved", all other states → "In Process".
 - When status is "Not Submitted", the `submittedDate` is returned as empty.
 - The `oweToPlan` calculation: if income reporting is not enabled or total income does not exceed the income threshold, the value is 0. Otherwise it equals `total_income - income_threshold`, formatted to two decimal places.
 - The response includes certifications across all fiscal years available for the faculty member.
-
-

Updated: 07-08-2026

GET /v2/export/app/facultyInfo/email/:email/:fiscal_year

Proc: `oats::ws_faculty::export::v2::get_faculty_info_by_email`

Description: Retrieves detailed faculty information and their reported outside activities for a specific fiscal year, identified by the faculty member's email address. Version 2 adds the organization name for each activity, the primary unit title, and an "owe to plan" calculation.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
email	path	yes	The email address of the faculty member (e.g., jsmith@university.edu).
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v2/export/app/facultyInfo/email/jsmith@university.edu/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
- The email must match an existing faculty member in the subsite.

Response

Content-Type: application/json

Success (HTTP 200):

```
{
  "response_code": "Ok",
  "response_message": "ws faculty info run successfully",
  "response_body": {
    "firstName": "Jane",
    "lastName": "Smith",
```

```
"email": "jsmith@university.edu",
"UID": "123456789",
"UCPathID": "80012345",
"employmentStatus": "A",
"separationDate": "",
"primaryUnitCode": "DEPTX",
"primaryUnitTitle": "Department of Computer Science",
"secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
"facultyStatusTagList": ["notInGoodStanding", "onleave"],
"policyName": "APM-025",
"timeThreshold": "48",
"incomeThreshold": "25,000.00",
"oweToPlan": "3,500.00",
"activityList": [
  {
    "label": "Consulting for Acme Corp",
    "category": "cat1",
    "organizationName": "Acme Corporation",
    "timeEntered": "120.00",
    "timeOverTH": "20.00",
    "incomeEntered": "15,000.00",
    "incomeOverTh": "5,000.00",
    "formList": [
```

```
{
  "formID": "8001",
  "Form": "cat1",
  "formStatus": "Accepted",
  "queueLabel": "",
  "lastUpdated": "09/01/2024"
}
],
{
  "label": "Board Member at Tech Foundation",
  "category": "cat1",
  "organizationName": "Tech Foundation",
  "timeEntered": "40.00",
  "timeOverTH": "",
  "incomeEntered": "5,000.00",
  "incomeOverTh": "",
  "formList": [
    {
      "formID": "8002",
      "Form": "cat1",
      "formStatus": "In Process",
      "queueLabel": "Department Chair",
```

```
"lastUpdated": "10/15/2024"
}
]
}
]
}
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message
response_body	object	The faculty data payload

Faculty Object (response_body)

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address

Field	Type	Description
UID	string	Campus UID
UCPathID	string	UCPath identifier
employmentStatus	string	"A" (Active) or "S" (Separated)
separationDate	string	Date of separation (empty if active)
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
secondaryUnitCodeList	array	List of secondary unit codes
facultyStatusTagList	array	Status tags (e.g., "notInGoodStanding", "onleave")
policyName	string	Applicable policy number (e.g., "APM-025")
timeThreshold	string	Time threshold in hours for the fiscal year
incomeThreshold	string	Income threshold amount for the fiscal year
oweToPlan	string	Amount owed to plan when income exceeds threshold
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
label	string	Activity title/name
category	string	Activity category type (e.g., "cat1")
organizationName	string	Name of the external organization
timeEntered	string	Total hours entered for the fiscal year
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income entered, formatted with commas
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
formList	array	Array of approval form objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1", "exceed_th")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
lastUpdated	string	Date of last status update (MM/DD/YYYY)

Differences from v1 (GET /v1/export/app/facultyInfo/email/:email/:fiscal_year)

Field	v1	v2	Description
primaryUnitTitle	✗	✓	Human-readable title of the primary unit
oweToPlan	✗	✓	Calculated as total_income - income_threshold when income reporting is enabled and total income exceeds threshold; otherwise 0
organizationName (in activity)	✗	✓	Name of the external organization associated with each activity

All other fields, parameters, validation rules, error responses, and behavior remain identical between v1 and v2.

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Faculty not found by email:

```
{  
  "response_code": "Error",  
  "response_message": "No matching faculty with Email = jsmith@university.edu in UCOATS",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint performs a live database query each time it is called.
- This proc delegates to oats::ws_faculty::export::v2::get_faculty_info with search_type "email".
- The oweToPlan calculation logic: if income reporting is not enabled (income_report_p is false) or total income does not exceed the income threshold, the value is 0. Otherwise it equals total_income - income_threshold, formatted to two decimal places.
- The facultyStatusTagList is dynamically built: "notInGoodStanding" is added when the faculty is not in good standing, and "onleave" is added when the faculty has leave to engage in outside activity.
- The employmentStatus field is derived from the separated_p flag: "A" for active faculty, "S" for separated faculty.

Updated: 07-08-2026

GET /v2/export/app/facultyInfo/ucpathID/:ucpath_id/:fiscal_year

Proc: oats::ws_faculty::export::v2::get_faculty_info_by_ucpath_id

Description: Retrieves detailed faculty information and their reported outside activities for a specific fiscal year, identified by the faculty member's UCPath ID. Version 2 adds the organization name for each activity, the primary unit title, and an "owe to plan" calculation.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
ucpath_id	path	yes	The UCPath ID of the faculty member (e.g., 80012345).
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v2/export/app/facultyInfo/ucpathID/80012345/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
- The ucpath_id must match an existing faculty member in the subsite.

Response

Content-Type: application/json

Success (HTTP 200):

```
{  
  "response_code": "Ok",  
  "response_message": "ws faculty info run successfully",  
  "response_body": {  
    "firstName": "Jane",
```

```
"lastName": "Smith",
"email": "jsmith@university.edu",
"UID": "123456789",
"UCPathID": "80012345",
"employmentStatus": "A",
"separationDate": "",
"primaryUnitCode": "DEPTX",
"primaryUnitTitle": "Department of Computer Science",
"secondaryUnitCodeList": ["DEPTY", "DEPTZ"],
"facultyStatusTagList": ["notInGoodStanding", "onleave"],
"policyName": "APM-025",
"timeThreshold": "48",
"incomeThreshold": "25,000.00",
"oweToPlan": "3,500.00",
"activityList": [
  {
    "label": "Consulting for Acme Corp",
    "category": "cat1",
    "organizationName": "Acme Corporation",
    "timeEntered": "120.00",
    "timeOverTH": "20.00",
    "incomeEntered": "15,000.00",
    "incomeOverTh": "5,000.00",
```

```
"formList": [  
  {  
    "formID": "8001",  
    "Form": "cat1",  
    "formStatus": "Accepted",  
    "queueLabel": "",  
    "lastUpdated": "09/01/2024"  
  }  
]  
,  
{  
  "label": "Board Member at Tech Foundation",  
  "category": "cat1",  
  "organizationName": "Tech Foundation",  
  "timeEntered": "40.00",  
  "timeOverTH": "",  
  "incomeEntered": "5,000.00",  
  "incomeOverTh": "",  
  "formList": [  
    {  
      "formID": "8002",  
      "Form": "cat1",  
      "formStatus": "In Process",
```

```
"queueLabel": "Department Chair",
"lastUpdated": "10/15/2024"
}
]
}
]
}
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message
response_body	object	The faculty data payload

Faculty Object (response_body)

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name

Field	Type	Description
email	string	Faculty member email address
UID	string	Campus UID
UCPathID	string	UCPath identifier
employmentStatus	string	"A" (Active) or "S" (Separated)
separationDate	string	Date of separation (empty if active)
primaryUnitCode	string	Primary department/unit code
primaryUnitTitle	string	Primary department/unit title
secondaryUnitCodeList	array	List of secondary unit codes
facultyStatusTagList	array	Status tags (e.g., "notInGoodStanding", "onleave")
policyName	string	Applicable policy number (e.g., "APM-025")
timeThreshold	string	Time threshold in hours for the fiscal year
incomeThreshold	string	Income threshold amount for the fiscal year
oweToPlan	string	Amount owed to plan when income exceeds threshold
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
label	string	Activity title/name
category	string	Activity category type (e.g., "cat1")
organizationName	string	Name of the external organization
timeEntered	string	Total hours entered for the fiscal year
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income entered, formatted with commas
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
formList	array	Array of approval form objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1", "exceed_th")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue (empty if accepted, "Faculty" if not submitted, queue name if in process)
lastUpdated	string	Date of last status update (MM/DD/YYYY)

Differences from v1 (GET /v1/export/app/facultyInfo/ucpathID/:ucpath_id/:fiscal_year)

Field	v1	v2	Description
primaryUnitTitle	✗	✓	Human-readable title of the primary unit
oweToPlan	✗	✓	Calculated as total_income - income_threshold when income reporting is enabled and total income exceeds threshold; otherwise 0
organizationName (in activity)	✗	✓	Name of the external organization associated with each activity

All other fields, parameters, validation rules, error responses, and behavior remain identical between v1 and v2.

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Faculty not found by UCPATH ID:

```
{  
  "response_code": "Error",  
  "response_message": "No matching faculty with UCPATH ID = 80012345 in UCOATS",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint performs a live database query each time it is called.
 - The oweToPlan calculation logic: if income reporting is not enabled (income_report_p is false) or total income does not exceed the income threshold, the value is 0. Otherwise it equals total_income - income_threshold, formatted to two decimal places.
 - The facultyStatusTagList is dynamically built: "notInGoodStanding" is added when the faculty is not in good standing, and "onleave" is added when the faculty has leave to engage in outside activity.
 - The employmentStatus field is derived from the separated_p flag: "A" for active faculty, "S" for separated faculty.
-

Updated: 07-08-2026

GET /v2/export/app/jwt-login

Proc: ctrl::restful::jwt::login_default_type_email

Description: Authenticates a user by email and password and returns a signed JWT token. This token is then used as a Bearer token for subsequent authenticated API calls. This endpoint provides JWT authentication for the v2 export API.

Authentication: None (this is the login endpoint used to obtain a Bearer token)

Parameters

Name	Location	Required	Description
email	query	yes	The email address of the user to authenticate.
password	query	yes	The password of the user to authenticate.

How to Call

GET /v2/export/app/jwt-login?email=jsmith@university.edu&password=secret123

Response

Content-Type: application/json

Success (HTTP 200):

```
{  
  "response_code": "Ok",  
  "response_message": "User authentication valid",  
  "response_body":  
  "eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJpc3MiOiJvYXRzliwic3ViljoiZW1haWw6anNtaXRoQHVuaXZlcnNpdHkuZWR1liwiYXVkljoiOiB2F0cy1hcGkiLCJleHAiOiJlE3MjA0MDAwMDAsImhhdCI6MTcyMDMxMzYwMCwiY2xpZW50X2lkIjoiYWJjMTIzliwiY3VzdF9hY2NfdG9rZW4iOiJyYW5kb21zdHJpbmcfQ.signature"  
}
```

The response_body contains the JWT token string. Use this value as the Bearer token in the Authorization header for all subsequent v2 API calls:

Authorization: Bearer eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9...

Response Fields

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message describing the result
response_body	string	The signed JWT token (on success) or empty string (on error)

Error Responses

Authentication failed (HTTP 401):

```
{
  "response_code": "Error",
  "response_message": "User authentication failed",
  "response_body": ""
}
```

This is returned when:

- The email does not match any user in the system
- The password is incorrect for the given email

Differences from GET /v1/export/app/jwt-login

Aspect	v1	v2
URL	/v1/export/app/jwt-login	/v2/export/app/jwt-login
Proc	ctrl::restful::jwt::login_default_type_email	ctrl::restful::jwt::login_default_type_email

Aspect	v1	v2
Parameters	Identical	Identical
Response format	Identical	Identical
Behavior	Identical	Identical
Package context	Bound to v1 export WS instance	Bound to v2 export WS instance

Both endpoints invoke the **same underlying procedure** with the same parameters and produce the same response. The key distinction is the **package context** (ad_conn package_id): each version is registered under its own web service instance (export-ws.json vs. export-v2-ws.json). This means the JWT setup configuration (signing keys, expiration, issuer, audience) is resolved from the respective package instance. If both v1 and v2 share the same package instance configuration, the generated tokens are interchangeable.

In practice, a token obtained from /v2/export/app/jwt-login should be used with v2 endpoints, and a token from /v1/export/app/jwt-login should be used with v1 endpoints, to ensure the OAuth validation context matches.

Notes

- This proc is marked as **deprecated** in the current codebase.
 - The JWT token includes registered claims: iss (issuer), sub (subject, formatted as email:<user_email>), aud (audience), exp (expiration timestamp), and iat (issued at timestamp).
 - The token also includes custom claims: client_id and cust_acc_token.
 - Token expiration is configured in the JWT setup for the package instance. After expiration, a new token must be obtained by calling this endpoint again.
 - The signing algorithm and keys are configured per package instance via the JWT setup.
-

Updated: 07-08-2026

GET /v2/export/app/activities/cat1-with-coi/:fiscal_year

Proc: oats::ws_faculty::export::v2::get_faculty_with_coi_activities_in_fiscal_year

Description: Retrieves all faculty members with Category 1 COI (Conflict of Interest) activities for a given fiscal year. This performs a live database query (not a pre-generated snapshot) and supports optional filtering by activity creation date range and Cat1 form status.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.
reported_date_range_begin	query	no	Filter activities by creation date start. Format: MM/DD/YYYY. Must be used with reported_date_range_end.
reported_date_range_end	query	no	Filter activities by creation date end. Format: MM/DD/YYYY. Must be greater than reported_date_range_begin.
cat1_form_status	query	no	Filter by Cat1 form status. Values: accepted, not submitted, in process (case-insensitive).

How to Call

Basic call:

GET /v2/export/app/activities/cat1-with-coi/2024-2025

Authorization: Bearer <token>

With optional filters:

GET /v2/export/app/activities/cat1-with-coi/2024-2025?reported_date_range_begin=07/01/2024&reported_date_range_end=12/31/2024&cat1_form_status=accepted

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025). The second year must be exactly 1 greater than the first.
 - If date range filters are provided, both reported_date_range_begin and reported_date_range_end must be present, and the end date must be greater than the start date.
 - cat1_form_status must be one of: accepted, not submitted, in process.
-

Response

Content-Type: application/json

```
{  
  "response_code": "Ok",  
  "response_message": "ws faculty with coi info run successfully",  
  "response_body": {  
    "facultyCount": "42",  
    "facultyList": [  
      {  
        "firstName": "Jane",  
        "lastName": "Smith",  
        "email": "jsmith@university.edu",  
        "campusID": "123456789",  
        "UCPathID": "80012345",
```

```
"fiscalYear": "2024",
"activityList": [
  {
    "activityID": "5001",
    "label": "Consulting for Acme Corp",
    "category": "cat1",
    "activityTypeList": ["Consulting", "Board Membership"],
    "organizationName": "Acme Corporation",
    "description": "Providing technical consultation",
    "type": "For-Profit",
    "creationDate": "2024-08-15",
    "timeEntered": "120.00",
    "timeOverTH": "20.00",
    "incomeEntered": "15,000.00",
    "incomeOverTh": "5,000.00",
    "formList": [
      {
        "formID": "8001",
        "Form": "cat1",
        "formStatus": "Accepted",
        "queueLabel": "",
        "lastUpdated": "09/01/2024",
        "startDateSeeking": "2024-07-01",
```

```
"endDateSeeking": "2025-06-30",
"endDateApprove": "09/01/2024"
}
]
}
]
}
]
}
}
}
```

Response Fields

Top-Level Envelope

Field	Type	Description
response_code	string	"Ok" on success, "Error" on failure
response_message	string	Status message
response_body	object	The data payload (see below)

Response Body Object

Field	Type	Description
facultyCount	string	Total number of faculty in the response

Field	Type	Description
facultyList	array	Array of faculty objects

Faculty Object

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
campusID	string	Campus ID number
UCPathID	string	UCPath identifier
fiscalYear	string	Fiscal year (start year only, e.g., "2024")
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
activityID	string	Unique activity identifier
label	string	Activity title/name
category	string	Activity category (e.g., "cat1")
activityTypeList	array	List of activity type labels

Field	Type	Description
organizationName	string	Name of the external organization
description	string	Activity description
type	string	Organization type (e.g., "For-Profit")
creationDate	string	Date the activity was created
timeEntered	string	Total hours entered for the fiscal year
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income entered, formatted with commas
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
formList	array	Array of approval form objects

Form Object

Field	Type	Description
formID	string	Approval request form identifier
Form	string	Form type (e.g., "cat1")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue label (empty if accepted, "Faculty" if not submitted)

Field	Type	Description
lastUpdated	string	Date of last status update
startDateSeeking	string	Approval start date being sought
endDateSeeking	string	Approval end date being sought
endDateApprove	string	Date approved (empty if not yet approved)

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Invalid date range (end date not greater than start date):

```
{  
  "response_code": "Error",  
  "response_message": "Submitted date range not valid, the end date must be grater the start date",  
  "response_body": ""  
}
```

Invalid Cat1 form status value:

```
{
```

```
"response_code": "Error",  
"response_message": "Cat I Form status not valid",  
"response_body": ""  
}
```

Site report configuration error:

```
{  
"response_code": "Error",  
"response_message": "Could not get information from ucoats-site-report package",  
"response_body": ""  
}
```

Notes

- This endpoint performs a live database query each time it is called (unlike the `/batch/activity/cat1-coi-full/` endpoint which serves pre-generated snapshots).
- The response wraps the data in the standard `response_code / response_message / response_body` envelope.
- The `formList` in this endpoint contains a simplified set of form fields compared to the "full" variant — it does not include IP disclosures, organizational roles, leave information, or prior engagement flags.
- Only faculty with at least one matching activity are included in the response.
- The `cat1_form_status` filter maps as follows: `accepted` → approved state, `not submitted` → pending state, `in process` → all other workflow states.

Updated: 07-08-2026

GET /v2/export/app/batch/activity/cat1-coi-full/:fiscal_year

Proc: oats::ws_faculty::export::v2::get_faculty_with_coi_activities_full_in_fiscal_year

Description: Retrieves the full data snapshot of all faculty members with Category 1 COI (Conflict of Interest) activities for a given fiscal year. The data is pre-generated weekly and served from a stored JSON snapshot file.

Authentication: Bearer token required

Parameters

Name	Location	Required	Description
fiscal_year	path	yes	The fiscal year in YYYY-YYYY format (e.g., 2024-2025). The end year must be exactly one greater than the start year.

How to Call

GET /v2/export/app/batch/activity/cat1-coi-full/2024-2025

Authorization: Bearer <token>

Validation Rules

- The fiscal_year must contain a hyphen separating two years (e.g., 2024-2025).
 - The second year must be exactly 1 greater than the first year. Otherwise, the endpoint returns an error.
-

Response

Content-Type: application/json

On success, the endpoint returns the snapshot file as a JSON download (with Content-Disposition header for file download). The JSON structure is:

```
{  
  "snapshotDate": "07/01/2025 03:00:00",
```

```
"campusCode": "UCLA",
"facultyCount": "142",
"facultyList": [
  {
    "firstName": "Jane",
    "lastName": "Smith",
    "email": "jsmith@university.edu",
    "campusID": "123456789",
    "UCPathID": "80012345",
    "fiscalYear": "2024",
    "activityList": [
      {
        "activityID": "5001",
        "label": "Consulting for Acme Corp",
        "category": "cat1",
        "activityTypeList": ["Consulting", "Board Membership"],
        "organizationName": "Acme Corporation",
        "description": "Providing technical consultation",
        "type": "For-Profit",
        "creationDate": "2024-08-15",
        "timeEntered": "120.00",
        "timeOverTH": "20.00",
        "incomeEntered": "15,000.00",
```

```
"incomeOverTh": "5,000.00",
"ipUcUsage": "No",
"ipUcConsult": "No",
"ipUcConsultStatus": "",
"ipOutsideCreation": "No",
"ipOutsideInvention": "No",
"formList": [
  {
    "formID": "8001",
    "Form": "cat1",
    "formStatus": "Accepted",
    "queueLabel": "",
    "lastUpdated": "09/01/2024",
    "endDateApprove": "09/01/2024",
    "startDateSeeking": "2024-07-01",
    "endDateSeeking": "2025-06-30",
    "personOrEntityDescription": "Acme Corp CEO",
    "companyWebAddress": "https://acme.example.com",
    "nonUsGrantSupport": "f",
    "nonUsInkind": "f",
    "nonUsInkindDescription": "",
    "orgRolesList": ["Consultant", "Advisor"],
    "natureOfParticipationDescription": "Technical advisory",
```

```
"estimatedNumberOfHoursDuringAnnualPeriod": "120",
"fullOrPartTimeLeave": "f",
"leaveStartDate": "",
"leaveEndDate": "",
"engagedBeforePermissionFaculty": "f",
"engagedBeforePermissionStaff": "f"
}
]
}
]
}
]
}
```

Response Fields

Top-Level Object

Field	Type	Description
snapshotDate	string	Date/time the snapshot was generated (MM/DD/YYYY HH:MM:SS)
campusCode	string	Campus code identifier (e.g., "UCLA")
facultyCount	string	Total number of faculty in the response
facultyList	array	Array of faculty objects

Faculty Object

Field	Type	Description
firstName	string	Faculty member first name
lastName	string	Faculty member last name
email	string	Faculty member email address
campusID	string	Campus ID number
UCPathID	string	UCPath identifier
fiscalYear	string	Fiscal year (start year only, e.g., "2024")
activityList	array	Array of activity objects

Activity Object

Field	Type	Description
activityID	string	Unique activity identifier
label	string	Activity title/name
category	string	Activity category (e.g., "cat1")
activityTypeList	array	List of activity type labels
organizationName	string	Name of the external organization
description	string	Activity description

Field	Type	Description
type	string	Organization type (e.g., "For-Profit")
creationDate	string	Date the activity was created
timeEntered	string	Total hours entered for the fiscal year
timeOverTH	string	Hours exceeding the threshold (empty if N/A)
incomeEntered	string	Total income entered, formatted with commas
incomeOverTh	string	Income exceeding the threshold (empty if N/A)
ipUcUsage	string	UC IP usage disclosure
ipUcConsult	string	UC consulting IP disclosure
ipUcConsultStatus	string	UC consulting IP status
ipOutsideCreation	string	Outside IP creation disclosure
ipOutsideInvention	string	Outside IP invention disclosure
formList	array	Array of approval form objects

Form Object (Cat1)

Field	Type	Description
formID	string	Approval request form identifier

Field	Type	Description
Form	string	Form type (e.g., "cat1")
formStatus	string	Status: "Accepted", "Not Submitted", or "In Process"
queueLabel	string	Current queue label (empty if accepted)
lastUpdated	string	Date of last status update
endDateApprove	string	Date approved (empty if not yet approved)
startDateSeeking	string	Approval start date being sought
endDateSeeking	string	Approval end date being sought
personOrEntityDescription	string	Description of person/entity
companyWebAddress	string	Organization web address
nonUsGrantSupport	string	Non-US grant support flag ("t"/"f")
nonUsInkind	string	Non-US in-kind support flag ("t"/"f")
nonUsInkindDescription	string	Description of non-US in-kind support
orgRolesList	array	List of organizational roles
natureOfParticipationDescription	string	Nature of participation
estimatedNumberOfHoursDuringAnnualPeriod	string	Estimated hours during annual period

Field	Type	Description
fullOrPartTimeLeave	string	Full/part time leave flag ("t"/"f")
leaveStartDate	string	Leave start date (empty if N/A)
leaveEndDate	string	Leave end date (empty if N/A)
engagedBeforePermissionFaculty	string	Engaged before faculty permission ("t"/"f")
engagedBeforePermissionStaff	string	Engaged before staff permission ("t"/"f")

Error Responses

Invalid fiscal year range:

```
{  
  "response_code": "Error",  
  "response_message": "Fiscal Year range not valid",  
  "response_body": ""  
}
```

Snapshot data not found (no pre-generated file exists for the requested fiscal year):

```
{  
  "response_code": "Error",  
  "response_message": "Data Not Found",  
  "response_body": ""  
}
```

Site report configuration error:

```
{  
  "response_code": "Error",  
  "response_message": "Could not get information from ucoats-site-report package",  
  "response_body": ""  
}
```

Notes

- This endpoint serves a pre-generated snapshot file. The snapshots are regenerated weekly by the scheduled `proc ucoats::report::v2::generate_faculty_activity_coi_full_snapshot`.
 - Snapshots are generated for the last 10 fiscal years from the current fiscal year.
 - The response is delivered as a file download (`ad_return_string_as_file`) with MIME type `json`.
 - The `fiscal_year` value stored internally uses only the start year (e.g., 2024 for fiscal year 2024-2025).
 - Only activities with COI relevance (Category 1) are included. The `formList` for `cat1` type forms includes extended fields like IP disclosures, organizational roles, leave info, and prior engagement flags.
-
-