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Re: Effort Reporting System – Base Release 8.2

We are pleased to announce the availability of Release 8.2 of the base Effort Reporting System.
This release includes numerous enhancements and bug fixes. Highlights of these changes are:

- Fix problems associated with creating and editing departmental security administrators in decentralized security mode.
- Resolution of several problems related to notifications, including date calculations being off by one day, handling null email addresses when dispatching notifications, and sending only one RDUE reminder per overdue period.
- Addition of a new specific notification type, ODPI, which can be sent to PIs at a threshold date past a reporting period due date.
- Addition of a new filter on the Funding Source search tab, allowing filtering by Account or Fund org.
- Access point resources are no longer visible when building a permission
- Improve the performance of searches that use Funding Sources and Sponsored Projects to find reports
- Fixes to editing of security administrators in decentralized security administration mode

A complete summary of the 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.
Complete technical details for each change can be found in the Bugzilla database using the bug
number listed in these documents.

Documentation changes

Both the *Operations Guide* and the *Customization Guide* have been updated for this release. New
versions of these documents are included with the release materials.

Configuration Files

The ERSConfig.xml file has changed, adding a new notification threshold value for the new ODPI notification. See the *Customization Guide* for further details.

Interface Process Changes

With Release 8.2, there are no changes to any interface process file specification.

Database Changes

The structure of the ERS database has changed with this release.. See *Installation Instructions* below for details.

Upgrade Batch Jobs

This release includes a one-time java batch job that needs to be run after the database structure changes have been applied. See *Installation Instructions* below for details.

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. To upgrade a R8.1 database to R8.2, run the appropriate ERS_R8-2 upgrade batch script for your DBMS, then run the new, one-off batch program `edu.ucop.ers.generate.batch.RunGenerateReportFundingSources`,.
5. Perform campus release testing.

Timing of Installation

Installation of this release is <u>not urgent</u>. As usual, campuses are encouraged to install this release in as timely a fashion as possible, and in the normal numeric sequence of releases.

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

Release Sunset

With this release, ERS is retiring support branch 7.5. Base ERS will no longer release any fixes or enhancements to the 7.5 support branch.

cc: ERS Management Group

ERS Requirements Group