Release notes

HALO PV 2.1

November 2019

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ABOUT THIS RELEASE

HALO PV version 2.1 is a standard release.

NEW FEATURES IN HALO PV 2.1

Area / Process / Group	Title	Description
Structured content authoring	Snippets and text placeholders	Improvement of existing placeholder features and addition of dynamic document snippets allowing dynamic inclusion of content blocks including both simple snippets (text) and complex snippets comprised of individual word documents (sub-templates) Records with snippet type can be inserted into a document without configuring document template placeholders. A snippet is linked to a snippet "type" which is inserted into the word template. From the word template, the title, notes and description of the snippet can be referenced: Example: {#snippet type name}{TITLE}{NOTES}{DESCRIPTION}{/snippet type name} The user can dynamically (per record) select the actual snippets to include including the order of the snippets
Rendition	Document rendition	Rendition of multiple templates into one combined word document and/or PDF document
Training	Training module and automations	New training module allowing configuration of the mapping between Training and access roles. The new workflows include new automaters for automatic creation of training tasks and assignment of roles on training completion: 1. A training configuration is setup linking user(s) and role(s) 2. Users automatically recive a task including training information and links 3. On completion of the training task(s) users are individually assigned the role(s) configured in step 1
Access	Access configuration of individually assigned records	Improvements to the workflow configuration setup to support locking/hiding of individually assigned records. It is now possible to control - per workflow - whether or not to lock a record when it is assigned to an individual

Risk management	Risk management updates	Risk management module updated with new child forms, overviews and document templates (general re-work and improvement of the module impacting workflows and fields)
Entities and agreements	Child organizations	Improved organizational entity setup to support flexible organizational setup and data segregration. The new setup supports inclusion of multiple organizations under another organization (e.g. providing an affiliate access to related partner organizational data)
Document management	Attachment upload	Support of multi-file upload to document repository (before, files had to be uploaded one at a time)
Access	Dashboard access control	Dashboard access control updated to support configuration of specific access on individual dashboards
Help	Child form help text	Workflows for front-end adminsitration of help text throughout the application (item help text)
Help	Use case report	Auto-generated workflow and use-case overview for all workflows including overview of configuration, tasks and record form fields
Standard reports	Requirement intelligence and Data collection programs	New standard reports for overview of requirement intelligence and data collection programs providing better overview for various groups (e.g. Case handlers, submission teams, HQ and technical support / configuration teams)
Record management	Record cloning	Ability to clone existing records including detailed form content added
Notification	Notification framework	System notifications extended with a more detailed setup for controlling when and to whom notifications are generated (e.g. notification on task completion and due-soon notifications). In addition to email notifications, the new setup includes in-system notifications and add-hoc notifications on individual records. Users can mark notifications as read in all in-application notification overviews.
Access	Single-sign-on	Single-sign-on using common authentication providers (e.g. Linkedin, Azure (Microsoft AD), Facebook, Google and more)
Access	Light users	Introduction of a "light" user profile type which do not provide access to the system but can be used for group notifications and other situations where a shared / virtual user is desired
Configuration	Workflow cloning	It is now possible to clone an entire workflow configuration including tasks and task actions
Configuration	Record title	The record title label can now be configured (e.g. using specific labels for specific workflow records)
Child forms		Re-work of child forms and workflows for Entity and Agreement management, Safety Data exchange agreements and Regulatory intelligence

Roles	Interface user role	New admin role (Integration / Interface responsible) - controls access to fields related to the Safety database integrations
Case form	Main form updates	The Main record form is updated (sorting of tabs and tab labels updated)
Case form	URL field on main form	Addition of URL field on master form (e.g. for entering training links to external systems)
User administration	New User administration features (Page 47)	Page 47: S3 tab is enabled for global admin User lock field added Switch to determine if password should be updated on save added
Reconciliation	Reconciliation features	Reconciliation workflows and automaters added for Data collection programs and Regulatory intelligence including: - Investigator / QC notification setup using the HALO scheduler for automatic creation of reconciliation tasks at selectable intervals from program start - Reconciliation of Regulatory intelligence records based - e.g. supporting configurable notification of support and submission teams based on roles and/or custom configurable record tags

BACKEND / TECHNICAL IMPROVEMENTS

Area / Process / Group	**Title**	**Description**
Audit log	User role audit log	User assigned roles audit feature updated to use procedure instead of trigger to align with general audit log setup
Child forms	Child form data structure	Update of child record backend setup to allow more flexible update of child forms (generic database structure and audit log features for child forms)

BUG FIXES

Area / Process / Group	**Title**	**Description**
Document management	S3 storage	Automatic assignment of S3 (storage) profiles to new users. Before, a user administrator had to add activate S3 storage credentials before a user could access the document repository. Now, users can access the repository when they are created (depending on the users roles and assignments)
Data segregation	Organization filter	The organizational filter is now mandatory and is per default set to the current users organization. Before, the filter could be left

		blank, providing access to the record for all users.
Data segregation	Access filters	Access filters (organization, product, study, territory) updated throughout the application to restrict the user to the filters configured in the users organization. Before accesses filters where depending on the specific page. Now, accesses filters work the same way on all pages.
Audit log	Creation time	Logging of creation time (duplicated) removed. Before, the creation time was incorrectly logged as a separate value. Now, it is logged as the timestamp of the first audit log entry
Case form	Case save	Next task / Previous task buttons and Task action buttons now save the record without hitting save first. On creation of a new record, the record including the child form is saved at creation without having to click Save first. The workflow is initiated at creation.
Case form	Application version	The application version and name is now displayed at the top of all pages. Before, this information was only available on some pages
Document management	S3 form	The S3 storage form can now be called with a record ID only (e.g. Skipping the record revision). When called this way, it will per default show the current documents. Before, the page could only page called with a revision and would fail if a revision was not provided
Access	Assigned user	Assigned user on a record is now automatically removed if the user do not have access to the record after routing to next/previous step. Before, the user stayed on the record and would have to be removed for other users to take over the task
Access	Access to user audit log (Page 20)	Page 20: Audit log removed (users should not see audit trail on My roles - only the user admin should be able to see this)
Access	Individual assignment filter	Individual assignment filter moved from Data access check to Task access check
Access	Access filters	Access filter SQL re-written to improve performance including caching of user admin roles (before, roles where checked at each query. Now, the access it checked at login and re-authentication)