

Agatha Cloud Service

Release Notes – Release 2.15

Document Information

Document Title	Release notes for Agatha Release 2.15	
Document Version	1.0	
Document ID	AGT-REL-R2.15	
Effective Date	2019-FEB-25	

Contents

1	Rel	ease Scope	3
2	List	of changes	3
	2.1	Functional Improvement	3
	2.2	Defect Closure	4
3	Ref	erence	6
4	Sup	pport and Problem Reporting	6
5	Det	tailed Description of the Functional Changes	7
	5.1	AGT-1207 – Export Document as Zip	7
	5.2	AGT-2070 – Table of content in online viewer	10
	5.3	AGT-2365 – Metadata link to latest major version and latest version of documents	12
	5.4	AGT-2371 – Warning that document shortcuts will be generated	13
	5.5	AGT-2377 – Realignment of milestone names	15
	5.6	AGT-2408 – Link to task from workflow history page	16
	5.7	AGT-2422 – Search for document owner in web forms.	17
	5.8	AGT-2491 – Sort based on placeholder and object type	17
	5.9	AGT-2512 – Remove error message when accessing deleted folder.	18
	5.10	AGT-2526 – Workspace drop-down menu searchable	19
	5.11	AGT-2541 – Checksum in documents exported through workspace export	19
	5.12	AGT-2543 – Convert EMF images to Bitmap in office documents	20



	5.13	AGT-2559 – Restrict users who can send a document back to draft	21
	5.14	AGT-2579 – Performance improvement on document views.	22
	5.15	AGT-2589 – Outline of disable users.	22
	5.16	AGT-2590 – Move of "Import" operation to the view menu	22
	5.17	AGT-2603 – Warning when checking in a document that has not been modified	23
	5.18	AGT-2616 – Improve overall performance on high latency networks	23
	5.19	AGT-2634 – Delete folders references in artifacts	24
6	Kno	wn issues	25



1 Release Scope

Agatha has released Agatha Cloud Service release 2.15. The following sections describe the functional improvement provided as part of this release as well as the defects addressed by that release.

2 List of changes

2.1 Functional Improvement

The following functional changes are provided as part of the release.

Issue key	Support #	Summary	
AGT-1207		Provide ability to export selected documents as Zip for a given workspace.	
AGT-2070⁵		Add ability to display bookmarks (table of content) in the online viewer.	
AGT-2365 ³		Provide ability to create document metadata links to the latest major	
		version, the latest version or a specific version of a document.	
AGT-23716		Show a message when finalizing a document belonging to an Artifact that has Artifacts linked to it.	
AGT-2377 ⁵		Realign Site, Country and Corporate milestone names.	
AGT-2408 ³		Add an option to directly approve a task that is assigned to me from the workflow history page.	
AGT-2422 ³		Provide the ability to search for Document Owner in web forms.	
AGT-2491		Add the ability to sort views based whether a document is created and based on the object type (document or folder).	
AGT-2512		Remove the error message if the user tries to access a folder that does not exist anymore. Redirect the user silently to the root folder of the workspace instead.	
AGT-2526⁵		Make the workspace drop-down menu searchable if it has more than 20 items.	
AGT-2541⁵		When performing a workspace export, provide the ability to export the document checksum (SHA-256).	
AGT-2543		In lifecycle settings / PDF rendering options, add an option to enable the conversion of EMF images to Bitmap.	
AGT-2559⁵		Add the ability to restrict the users who are able to send a document back to draft.	
AGT-2579		Improve the performance of the display of the document views.	
AGT-2589	6578	When adding/editing a metadata, if a user is deactivated at a workspace or client level, display the label "(disabled)" next to the user name.	
AGT-2590		Move the "Import Folder" operation to the View action menu.	
AGT-2603	6740	Add a warning message if a user is trying to check-in a new version of a document with no file change.	



AGT-2616 ⁷ Improve the overall performance of the application from locations wit high network latency.	gatha
high network latency.	٦
AGT-2634 Allow the deletion of folders that are referenced in an artifact.	

^xPart of 2.14.X patch.

2.2 Defect Closure

The following defects have been closed as part of this release.

Issue key	Support #	Summary			
AGT-1266		If a user creates an artifact with placeholder, upload a document from the placeholder, obsolete the document, and delete the folder, then the folder cannot be deleted.			
AGT-13581		User import – Organization default group is not taken into account. (When selecting "use default org group").			
AGT-2061 ¹		Controlled Print cannot be issued when there is a change control running on the document.			
AGT-2329 ¹		Provide the ability to display 2 levels of attachments of a document in a "document link" metadata included in a web form.			
AGT-2387⁵		Single Sign Out between the online viewer and the Agatha main application is not working.			
AGT-2396 ¹		A technical error is generated when uploading a new version of a document that does not have a file extension.			
AGT-2412 ³	5928	"Nothing here move along" message is displayed to the users if they have not logged to Agatha for a long period of time.			
AGT-2414 ²		Change the link to the help center from https://deskportal.zoho.com/portal/agatha/home to https://support.agathalife.com/portal/ (Japanese language only).			
AGT-2454 ³		Improve the performance of the online viewer / online annotations.			
AGT-2505⁵		Approving a document (with electronic signature) that has been imported using Agatha import function fails.			
AGT-2509⁵		[Document Approved] notification is not sent if there is an empty optional approval step.			
AGT-2510⁵		When exporting a grouped view to Excel, the document status is not translated to Japanese if the columns that the view is grouped by are not part of the display columns of the view.			
AGT-2511⁵		When 2 approvers approved within the same second with an electronic signature, the task completes but the signatures are not added to the document.			
AGT-2513⁵		Include the link to the last approved task in the "Document Approved" notification.			
AGT-2514⁵		Attachments cannot be opened in main document version history.			
AGT-2516⁵		Comments from workflow initiator is not included in the change control form, nor in the task approval email notification. Workflow initiator is the system account and not the user who initiated the change.			



AGT-2519⁵		Parallel online review does not complete successfully in some cases.		
AGT-2520⁵		Update the parallel online review labels for private messages.		
AGT-2522⁵		Headings in the online viewer is duplicated on Safari/iPad when bold is applied to non-bold fonts		
AGT-2523⁵		Update of approval email template (Japanese version).		
AGT-2532⁵		Approval workflow due dates included in emails don't take into account the timezone of the lifecycle.		
AGT-25406		Add "Page not found" page on login server. (404 message).		
AGT-2542 ⁶		If a user clicks a deleted folder in the treeview, the user should be redirected to the root folder.		
AGT-2548⁵		Emails fail to be sent when there are too many recipient in an email to:, cc: or bcc: fields.		
AGT-2550	6578	Email notifications should not be sent to deactivated users.		
AGT-25706		In task email notifications, the date format should be 'yyyy-MMM-dd' regardless of language of the user starting the workflow.		
AGT-25776		Change copyright to 2019.		
AGT-2588	6578	Employee Records tasks should not be created for deactivated users.		
AGT-25976		After deleting a site-level artifact and adding a site, placeholders belonging to the deleted artifact are displayed.		
AGT-26016		Incorrect version of a document is opened after discarding a change on the document, and editing it afterwards on the same computer).		
AGT-2600	6709	Approval workflow fails in some cases.		
AGT-2602	6740	The local cache of office documents (in the Office Upload Center) is not refreshed when opening a new version of the document from Agatha.		
AGT-26046		Synchronize the folder templates when updating a permission level.		
AGT-26056		When editing a document properties, if an extended metadata has been added to the corresponding Artifact after the document creation, it is not possible to edit that metadata on the document.		
AGT-2614		Check out option should not be displayed in the action menu when a document is within a parallel review.		
AGT-2615		If a parallel review workflow has been cancelled in the past on a document, the checkout and edit buttons are not available in the document properties page in the review stage of the lifecycle.		
AGT-2622		Update spelling of View action menu items.		
AGT-2628		Word update fields is failing in some cases.		
AGT-2668		Workspaces selector, the filter should be applied on the workspace name field only.		

^xPart of 2.14.X patch.



3 Reference

ID	Reference	Description
1	Training Guide	Training Guide for Agatha R2.15.

4 Support and Problem Reporting

Support inquires can be routed through standard Agatha Support process by email at support@agathalife.com .



5 Detailed Description of the Functional Changes

5.1 AGT-1207 – Export Document as Zip

Issue key	Summary
AGT-1207 Provide ability to export selected documents as Zip for a given workspace.	
Scope	This enhancement is only provided to users with the "Workspace Export" permission.

It is now possible to select documents in a workspace to export as a Zip file:

1) Select "Export Documents" in the view action menu.

tries > F	R > _General > 01.Trial Management > 01.01.Tria	al Oversig	ght		x Ex	port to excel	
				-	්ට Re	eset to default view settings	
	Name	•	Ver. 💌		🚹 Ir	nport folder	
w 📕	002_template		1.0	Action 💊		xport Documents	
x 📕	Audit Certificate - Country_2017-10-03		0.12	Action N	'D Vi	ewa	
+	List of SOPs Current During Trial - Country			Action 🗸	Mis	sing	
+	Monitoring Plan - Country			Action 🗸	Mis	sing	
+	Operational Procedure Manual - Country			Action 🗸	Mis	sing	
+	Quality Plan - Country			Action 🗸	Mis	sing	
+	Roles and Responsibility Matrix - Country			Action 🗸	Mis	sing	

2) Drag and drop the files to export from the document list to the right window.

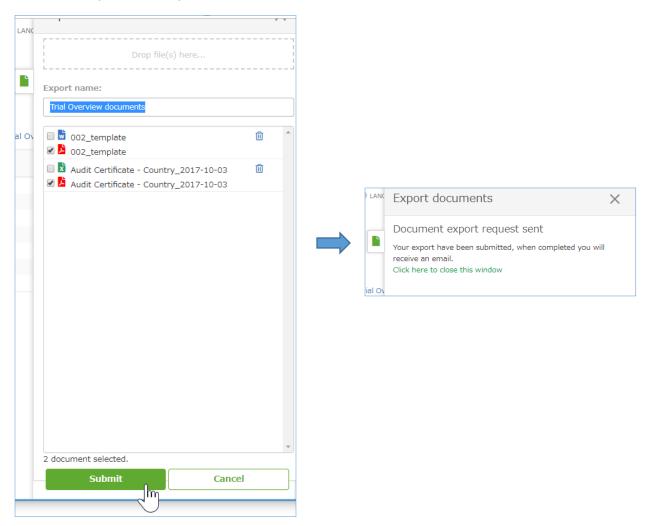
	1 LANC	Export documents X
d Document	Add Folder General > 01.Trial Management > 01.01.Trial Ov	1 dopument selected, drag to panel for tr.
	Name	
🖬 🗾	002_template	
x 📩	Audit Certificate - Country_2017-10-03	
+	List of SOPs Current During Trial - Country	
+	Monitoring Plan - Country	
+	Operational Procedure Manual - Country	
+	Quality Plan - Country	
+	Roles and Responsibility Matrix - Country	



3) For each file, the user can uncheck the renditions that should not be exported.

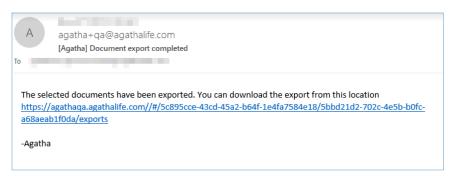


4) Provide a name for the export and click on "Submit". The provided name is used to easily find the export in the Export list later on.





5) When the export is ready, the user receives an email with a link to the export.

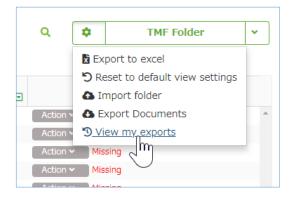


6) When clicking on the link, the user is redirected to a page that has all of his exports.

Agathonco Study	•			
My document expo	rts			
Export name	Export date	Export expiry date	Size	Status
Trial Overview documents	2019-02-11 01:23	2019-02-12 01:23	469.5 KB	Click to get your export
Document export	2019-01-13 21:27	2019-01-14 21:27	189.4 KB	Exe
Document export	2019-01-13 11:50	2019-01-14 11:50	258.7 MB	Expired
				1 - 3 of 3 items

Note that an export is only available for 24 hours. Then it is deleted from the system.

The user can also access the export page from the view action menu.





7) The user can download the export by clicking on the "get your export" link. The export contains the file selected as well as an "Export Report" excel spreadsheet that contains the list of exported documents with associated checksums.

 Export_Trial Over 	Export_Trial Overview documents2019-02-11_003313.zip				
	Name ^				
*	ዄ 002_template.pdf 🔁 Audit Certificate - Country_2017-10-03.pdf				
*	ExportReport.xlsx				
А					
*	r U				
*					

5.2 AGT-2070 – Table of content in online viewer

Issue key	Summary
AGT-2070	Add ability to display bookmarks (table of content) in the online viewer.
Scope	This enhancement is provided to all users that can view documents online.

For PDF and Word documents, it is now possible to see the table of bookmarks / content of documents in the online viewer.

1) After opening a document in the online viewer, the user can select the bookmark icon on the left-hand side.

Agatha AGT-REL-R2.11-Adm	in Manual v2.pdf v.0.6 AGT-REL-R2.11 Admin	n Guide v2.0	من المن المن المن المن المن المن المن ال	tha
A second	Ac	Agatha Cloud dministrator Manua		
Appla	Document Information	n Administrator Manual for A	vatha Release 2-11	
• Second	Document Version Document ID Effective Date	2.0 AGT-REL-R2.11 Admin Guid 2018-JUL-06		
* <u>* min * </u> * <u>* min * </u> * <u>* min * </u> * * * * * * * * * * * * * * * * * * *				



2) The list of bookmarks is displayed on the screen. The user can click on the bookmark to navigate to the corresponding page.

۲	∧gatha AGT-REL-R2.11-Admin Manual v2.pdf v	1. 0.6	
 1 Introduction 2 Location of the Agatha Settings 3 Permission and User management 3.1 Organization Users Management 3.2 Workspace Users Management 3.3 Permission management 		١dmin	n Guide v2.0
		Δι	Agatha Cloud Service dministrator Manual – Release 2.11
	 4 Document Metadata 5 Audiences 6 Document Views 7 Document Imycle 		
			n Administrator Manual for Agatha Release 2.11
	 8 Artifacts Management 9 Organization level specific settings 	ion	2.0 AGT-REL-R2.11 Admin Guide
	 10 Workspace level specific settings 1 Appendix – Agatha Unitary Permissions 		2018-JUL-06
		$\langle \cdot \rangle$	

₩ Agatha AGT-REL-R2.11-Admin	Manual v2.pdf v.0.6
 1 Introduction 2 Location of the Agatha Settings 3 Permission and User 	AGT-REL-R2.11 Admin Guide v2.0
management 3.1 Organization Users Management	6 Document Views It is possible to manage document views in the settings of a workspace or of an organization. KPIs Workspace Organization users Permission Metadata Artifacts Views Workspace Templates
 3.2 Workspace Users Management 3.3 Permission 	Countries and Sites Audit Log Misc. Organization Info Subscription Jobs Audiences Mail templates Permission levels Lifecycles Folder templates Views
management 4 Document Metadata	V LEWS Add view Name Folder Addan
 5 Audiences 6 Document Views 7 Document Life 	Deshboard Actors V Lot Actors V Actors V Actors V Actors V THE Environment
 8 Artifacts Management 9 Organization level specific settings 	 6.1 Add a new view View can be added by selecting "Add view" button. A page is displayed to configure the view.
 10 Workspace level specific settings 1 Appendix - Agatha Unitary 	Create view <pre></pre>
Permissions	Description (Required) Folder view

Note that in the case of PDF documents, the bookmarks that are displayed are the bookmarks included in the PDF document, whereas in the case of Word documents, the bookmarks are generated from the Word table of content.



5.3 AGT-2365 – Metadata link to latest major version and latest version of documents.

Issue key	Summary	
AGT-2365	Provide ability to create document metadata links to the latest major version, the latest	
	version or a specific version of a document.	
Scope	This enhancement is provided to all users.	

In the settings of a workspace (or of an organization), admin users with the "Manage Metadata" permission, can now create metadata links that point to the latest document version or to the latest major document version.

Add metadata	×
Name (Required)	
Link to document	~
Metadata key	
DocLink	✓
Description	
Link to a document	
	13
Туре	
Document link	Ŧ
Required 🗐	
Document link type	
Latest version	Ŧ
-	
Latest version	etadata Close
Latest major version	
Version-specific	

When "Latest version" is selected, this means that when the document link is displayed in the system, the link points to the latest version of the target document.

When "Latest major version" is selected, this means that the link points to the latest major version of the target document. So even of the target document is sent to Draft, the link still points to the latest major version.

When "version-specific" is selected, this means that the link points to a specific version of the target document. So even if the target document changes, the link still points to the specific version that was attached to the document.



5.4 AGT-2371 – Warning that document shortcuts will be generated.

Issue key	Summary	
AGT-2371	Show a message when finalizing a document belonging to an Artifact that has Artifacts	
	linked to it.	
Scope	This enhancement is provided to all users.	

A message is not displayed to users during a new document creation, or when a document is sent to approval or to the final stage, to warn the users that document shortcuts will be created for the document at other locations in the document library.

For example, let's assume that a Country-level artifact is linked to a Corporate-level artifact.

Edit artifact					>
General settings Create options Look and feel Me	tadata options Jobs Metad	data Sync			
Zone (Required)		Section (Required)			
02.Central Trial Documents		02.01.Product and Trial D	ocumentation		
Artifact Name (Required)	Artifact Number		Level		
Protocol - Country			Country		
Document Metadata Group		Countries restricted to			
TMF Base					
Document Naming					
[Artifact.Name]_[Document.DocumentDate]					
Document Location					
Countries/[Country.Code]/_General/[Artifact.Zone]/[Artifact.Zone]/	act.Section]/				
Placeholder Naming					
[Artifact.Name]					
Placeholder Location					
Countries/[Country.Code]/_General/[Artifact.Zone]/[Artifact.Zone]/	act.Section]/				
Milestone					
Link to artifact					
Zone (Required)	Section (Required)		Artifact (Required)		
02.Central Trial Documents	02.01.Product and Trial	Documentation •	Protocol		,
				Save changes	Close

Let's now create the document that is the target of the link.



☆ > Trial > 02.Central Trial Documents > 02.01.Product and Trial Documentation				
	Name			
w	Insurance_2017-10-17	Action 🗸 🔵		
+	Investigator's Brochure	Action 🗸 🔪		
+	Marketed Product Material	Action 🗸 🔪		
+	Protocol	Action 🗸 🔪		
+	Proto	Action 🗸		
4	Protocol Synopsis	Action 🗸		

A warning is displayed to the user:

Upload Documents								
Select files Or drop files here…								
	AGT-REL-R2.11-Admin Manual.docx		Size: 1.48 MB		100%			
W	Name Zone (Required) S	Section (Required)	Artifact (Required)	Owner (Required)				
	Auto 02.Central Trial Documents Extended name Reference		02.01.Product and Trial Documer Protocol	Protocol	Doe Jane 🔻			
			DocumentDate (Required)					
			Ë					
	Links to the current document wil	l be automatically generated when	the current document is made Final	. This means that the document wil	l be visible from other locations.			
	Submit Cancel							

A warning is also displayed when sending the document to approval, or to final stage.

Send Document To Approval	×	
Protocol_2019-02-11		
Version: 0.1		
Step 1 (Required)		
Jane Doe 🗙		
Approval type (Required)		
	•	
Approve document as PDF		
Due Date (Required)		
2019/02/11	*** =	
Send me a notification when a workflow participant completes a workflow task. When this option is enabled, in addition to email sent at the end of t workflow, you will also receive a notification every time a user completes workflow task.	he	Send document to Final confirmation × Protocol_2019-02-11 Version: 0.1
Comments		Do you want to send the document to final?
Enter a comment····		Enter a comment…
	10	
Links to the current document will be automatically generated when the current document is made Final. This means that the document will be visible from o locations.		Links to the current document will be automatically generated when the current document is made Final. This means that the document will be visible from other locations.
Start Approval	Cancel	Confirm Cancel



5.5 AGT-2377 – Realignment of milestone names.

Issue key	Summary
AGT-2377	Realign Site, Country and Corporate milestone names.
Scope	This enhancement is provided to all users.

The names of the milestones for Corporate, Country and Site documents have been realigned to the following single list:

- Startup
- Ongoing
- Closure
- Selection
- Approval
- Contract

Note that this list is displayed when add or editing a country or a site.

	Edit site ×
Add country ×	Name (Required)
Name (Required)	PHL
Name	Code (Required)
Code (Required)	PHL
Code	Country name
Milestone	US v
T	Milestone
	*
Startup	
Ongoing	Startup
Closure	Ongoing Closure
Selection	Selection
Approval	Approval
Contract	Contract

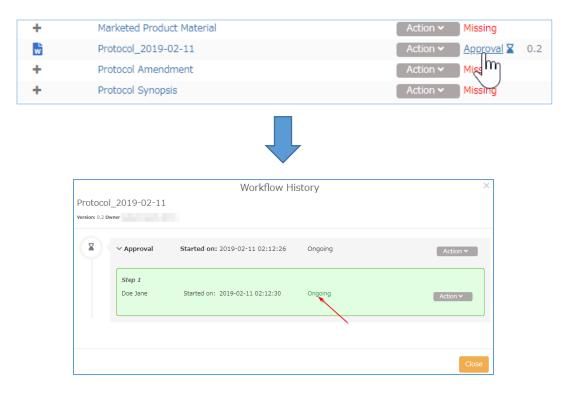
This list is also displayed when editing the milestone associated with an artifact, or when editing the milestone associate with a workspace (in the Misc. settings of the workspace).



5.6 AGT-2408 – Link to task from workflow history page.

Issue key	Summary
AGT-2408	Add an option to directly approve a task that is assigned to me from the workflow
	history page.
Scope	This enhancement is provided to all users.

If a task is assigned to the currently logged user, the link to the task is now available from the workflow history page.





5.7 AGT-2422 – Search for document owner in web forms.

Issue key	Summary
AGT-2422	Provide the ability to search for Document Owner in web forms.
Scope	This enhancement is provided to all users.

If a custom web form is used to display the properties of a document, it is now possible to look for the owner of the document in the form.

test owner properties		
Name	test owner	
Extended Name		
Owner	rob	
Effective Date	Robert Karlsson (robert.karlsson@agathalife.com)	
Valid Until	2018-11-20	
Attachments	form 3 (1.0) 🕜 Edit 🛛 Add attachment	
Distribution Users		
Distribution Audiences		

5.8 AGT-2491 – Sort based on placeholder and object type

Issue key	Summary
AGT-2491	Add the ability to sort views based whether a document is created and based on the
	object type (document or folder).
Scope	This enhancement is provided to all users.

Administrators who have the permission to manage views can now sort on the following 2 new pieces of metadata "Is created?" or "Type".

- "Is created?" has the value 0 for placeholders, and the value 1 for created documents and folders. This is useful display placeholders first in views.
- "Type" has the value 0 for documents and 1 for folders.



Select metadata to sort on	
Zone	[l₄ Is created
Section	↓ 2 Type
Artifact	
Document name	
Version	
Creation date	
Created by	
Modification date	

Note that those pieces of metadata are also available for regular users search in the document libraries.

			۹	\$	EDM Flat	~	,
Artifact: All 🗸	Modified by: All 🗸	Owner: All 🗸	Status: All 🗸	More 🗸		C	2
Is created: All 🗸	S Type: All	~ 0					
	Q						
No No						_	
Ves	◄	Modified by:				•	
							Í

5.9 AGT-2512 – Remove error message when accessing deleted folder.

Issue key	Summary
AGT-2512	Remove the error message if the user tries to access a folder that does not exist
	anymore. Redirect the user silently to the root folder of the workspace instead.
Scope	This enhancement is provided to all users.

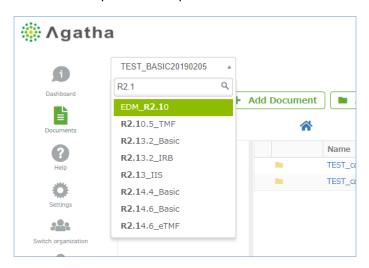
If a user navigated to a folder location and, in the meantime, the folder got deleted by another user, when the first user goes back into Agatha library again, the user is redirected to the root folder of the workspace. No error is displayed to the user. (Previously, there was a functional error displayed to the user.)



5.10 AGT-2526 – Workspace drop-down menu searchable.

Issue key	Summary
AGT-2526	Make the workspace drop-down menu searchable if it has more than 20 items.
Scope	This enhancement is provided to all users.

When there are more than 20 workspaces to display in the workspace drop-down menu, a search box is displayed for the user to search for a specific workspace to select.



5.11 AGT-2541 – Checksum in documents exported through workspace export.

Issue key	Summary
AGT-2541	When performing a workspace export, provide the ability to export the document
	checksum (SHA-256).
Scope	This enhancement is provided to users that have the "Workspace export" permission.

In the workspace settings, Export workspace content, a new option has been added to include the document checksums to the export spreadsheet.

Export workspace content	\times
Select a view	
TMF Folder •	
Include files	
Include audit log	
\square Append document Agatha Unique ID (AUID) to file name	
Include document checksum	
Export	•



When this option is checked off, the export spreadsheet included in the zip export of the workspace includes the checksum of each exported file.

А	в	с	D	E	F	G	Н	1	J	к	L	м		N	0
2,1	2017-07-03	Agatha 2.5	0.2	65b03c77-4	Draft	2018-08-20	Agathonco Study\2.12.3\2017-07-03 4	c254b9e0f	cbd24947	a4ef86ff5d27	7523509dd	29aef5b5	587491b	7f77c707c	d1d0
2,1	2017-07-03	Agatha 2.5	0.2	65b03c77-4	Draft	2018-08-20	Agathonco Study\2.12.3\2017-07-03 4	671431896	4b261212	a20abcca1fc	d1c9f40ea	ce7f38921	428d19d	80899497	645
1,2	AGT-REL-R	2.11-Admin	0.7	76db2768-	Approval	2018-08-20	Agathonco Study\2.12.3\AGT-REL-R2.	92eff808a	L88d4915d	fb1f99cf80b	61b0ba54	45b1e44fc	lbf46d8d	ddfa71196	i649
1,2	AGT-REL-R	2.11-Admin	0.7	76db2768-	Approval	2018-08-20	Agathonco Study\2.12.3\AGT-REL-R2.	70c0ed775	659fbb92	2d300235997	f75ab72o	:32ba294b	64fe37f	f81ebc73e	ee7c
1	AGT-REL-R	2.11-Admin	0.1	3e54f034-7	/ Draft	2018-08-20	Agathonco Study\2.12.3\AGT-REL-R2.	cc0b9f02c7	7ee419589	a0c6663477	154201d17	4b350df5	41fd27fo	dc0c0f42b	5e9
1.0	annual a Ad	DI	6 •	- 4-007-0 k	Durft	2010 00 11	A method and Churchell 2 12 2 amount of ARD	the state of the	(Intel Deed	the dedication	Net Charles		1.11477. 111		a la la la

5.12 AGT-2543 – Convert EMF images to Bitmap in office documents.

Issue key	Summary			
AGT-2543	In lifecycle settings / PDF rendering options, add an option to enable the conversion of			
	EMF images to Bitmap.			
Scope	This enhancement is provided to users that have the "Lifecycle edit" permission.			

In the lifecycle settings, a new option has been added to convert Word EMF images embedded in Microsoft Word documents to Bitmap.

Edit lifecycle	Edit lifecycle						
General settings	PDF rendering						
Enable Fast Web View Enable fast web view for PDF renditions.							
Off							
Render images with CMYK colors.							
Convert EMF images to Bitmap							
On Navigation							
Page only							



5.13 AGT-2559 – Restrict users who can send a document back to draft.

Issue key	Summary
AGT-2559	Add the ability to restrict the users who can send a document back to draft.
Scope	This enhancement is provided to users that have the "Lifecycle edit" permission.

In the Lifecycle settings, a new option has been added to restrict the users who can send a document back to draft to specific audiences, to the document owner or to the document author.

Edit lifecycle		×
General settings PDF rendering		
Name (Required)		
Default		
Default timezone		
Japan: Asia/Tokyo (UTC+09:00)		-
Synchronize document properties False		
Draft		~
Review		~
Approval		~
Publish		~
Final		^
Allow upload to final	True	
Make Final the Default Option	False	
Prevent send to Draft	False	
Limit the users who are able to send the document back to draft	[Audience] Allow send to draft X Doct Document author X	ument owner X
Overlay 🗸		
Obsolete		~
	Save	changes Close



5.14 AGT-2579 – Performance improvement on document views.

Issue key	Summary
AGT-2579	Improve the performance of the display of the document views.
Scope	This enhancement is provided to users that have the "Lifecycle edit" permission.

The performance of document views and of the action menu has been significantly improved.

5.15 AGT-2589 – Outline of disable users.

Issue key	Summary
AGT-2589	When adding/editing a metadata, if a user is deactivated at a workspace or client level,
	display the label "(disabled)" next to the user name.
Scope	This enhancement is provided to all users.

When editing a metadata that contains the list of users in the properties page (for example, the owner of the document), disable users are displayed with the label "(disabled)" next to their name.

5.16 AGT-2590 – Move of "Import" operation to the view menu.

Issue key	Summary
AGT-2590	Move the "Import Folder" operation to the View action menu.
Scope	This enhancement is provided to all users.

"Import Folder" operation has been moved to the document view action menu.

+	Add	Document	Add Folder			Q	٥	TMF Folder	•
*	> Cou	intries > FR >	_General > 05.Site Management > 05.01.Site Sel	ectio	n		_	port to excel eset to default view settings	
			Name	•	Ver. 💌		ΔI	mport folder	1
		Ŵ	Sites Evaluated but not Selected - Country_2019-02-1	.1	0.1	Action		xport Documents iew my exports	Â



5.17 AGT-2603 – Warning when checking in a document that has not been modified.

Issue key	Summary
AGT-2603	Add a warning message if a user is trying to check-in a new version of a document with no file change.
Scope	This enhancement is provided to all users.

If a user checks in a document without modifying the file content (only the document properties), a working message is displayed to the user in the document check in window.

5.18 AGT-2616 – Improve overall performance on high latency networks.

Issue key	Summary
AGT-2616	Improve the overall performance of the application from locations with high network latency.
Scope	This enhancement is provided to all users.

On high latency networks, for example when connecting to Agatha Japan datacenter from the United States, the overall performance of Agatha has been significantly improved.



5.19 AGT-2634 – Delete folders references in artifacts.

Issue key	Summary
AGT-2634	Allow the deletion of folders that are referenced in an artifact.
Scope	This enhancement is provided to all users.

A new setting has been added in the artifact configuration to allow the deletion of folders referenced in the artifact.

Edit artifact			
General settings Create options			
Zone (Required)		Section (Required)	
Clinical		Literature References -	Level
Artifact Name (Required) Artifact Number 5.4 Literature References - Clinical Study			Corporate
Document Metadata Group EDM Base Document Naming			
Document Location M5/04 Literature References			
True Allow users to delete the folders created from this artifact. Placehold Allow users to delete the folders created from this artifact. [Artifact.Name]			
Placeholder Location			
M5/04 Literature References			

When this option is enabled, the folders associated with an artifact can be deleted by users who have permission to delete folders (as long as there are no workflows running on the documents, no locked down items – like Final documents - and no placeholders in the folder).



6 Known issues

The following defects remain open at the time of the release.

Issue key	Support #	Summary
AGT-20		Policy page. "Active to date" has wrong (past) date.
AGT-60		In folder view mode, after re-classifying a document, user should be redirected to the new location of document.
AGT-61		In the Documents View, grouping on multi-valued field fails. It is needed to disable grouping on multi value field (Lookup Multiple & Person Or Group multiple).
AGT-71		If a metadata value is modified (in Edit properties), the grouping is not refreshed for this specific metadata (only when it is part of a grouping).
AGT-123		Date extended metadata is not refreshed in real time when updated.
AGT-137		Document Links are not refreshed real time when a new version of the source document is created.
AGT-139		Artifact Link - If a source doc and the link are in the same view, and if a new version of the source doc is created, the link version is not updated by in real time. User needs to refresh the page
AGT-152		Opening a document link from properties window on source document, the Document property is not populated.
AGT-154		When a workflow fails, the workflow status is not updated.
AGT-161		Extended metadata of type "PersonOrGroup (Multiple)" is not displayed with empty value in the documents view.
AGT-166		Artifact setting. For Artifacts which already have documents, do not show Remove button.
AGT-183		View Groups can be created on locked workspaces.
AGT-207		Edit menu item is not available if document extension is upper case.
AGT-210		Ensure that document action menu is always opening within the visible screen.
AGT-218		Cannot terminate workflow that fails before a task has been created
AGT-244		PDF rendition - characters jump to next lines for specific Japanese documents.
AGT-258		Products are not translated in subscription page.
AGT-321		Add Jobs as part of workspace templates
AGT-409		When updating a view group, the details of the change is not tracked in the audit log
AGT-416		Cannot delete an empty group associate with a folder that has been deleted
AGT-422		Duplicated audit log entries when adding a user to Organization or Workspace
AGT-428		Add name of group in all User Group management pages
AGT-437		The view displayed in the Dashboard is not based on the audience configuration in some cases.
AGT-490		Selected language is not being retained when refreshing the page
AGT-530		Create new workspace. The green flush does not gone even after 10 mins.
AGT-557		Address an issue when the Copy Document function fails in some context



AGT-562	It is not possible to reset the user password when the password policy expiration is set to 1 day
AGT-590	Create document - prevent the submit action until all the data are loaded
AG1-390	(site, country,)
AGT-594	If a user is added to the organization but to no workspaces, the user will not
	be able to access the organization dashboard.
AGT-595	When adding a new workspace while waiting for another one to be created,
	the parent workspace cannot be deselected.
AGT-635	For Readers group users who have Writers permission in other folders, "+ Add
	document" button is displayed. Show the button only when the user is in the
	folders the user has Writers permission.
AGT-660	Create PDF rendition from PDF fails in some scenarios.
AGT-666	Lock tasks that are part of a locked workspace
AGT-675	Add validation for new metadata fields when creating a workspace.
AGT-682	Validate all of the user input in the new document creation form
AGT-683	Validate user input in the Copy document form
AGT-684	Error opening files in Word or Excel that contain "/" in the document name
AGT-770	Some keys are not translated in the job window
AGT-782	Upon template creation, default views are not correctly selected
AGT-791	When Editing a document with Safari, Firefox or Internet Explorer, another
	Tab is opening in the browser
AGT-824	Error when reclassifying a Site-level artifact to a corporate-level artifact.
AGT-825	Address a formatting issue on the logout page.
AGT-858	In all documents folder view, the right hand window folder navigation is slow
	in some cases.
AGT-884	Filtering on lifecycle in folder view, does not show the folders.
AGT-907	Online Annotation: It is not possible to scroll using the mouse wheel if the
	cursor is on the document. Only works if the cursor is on the side in the
	comments area.
AGT-935	Credit card payment is not working in some cases.
AGT-950	Import folder is generating an error in some cases.
AGT-959	Annotations - when starting a review, switching from regular to parallel
	review should populate the reviewers from what has been entered in regular
	input text "step 1".
AGT-961	Annotations - Parallel review comments are not integrated back at the right
	location in Microsoft Word in some cases.
AGT-973	Technical Error is displayed in the browser logs when opening the send to
	review modal with Internet Explorer.
AGT-981	When resizing IE on the online viewer there is a white border at the bottom
ACT 080	of the window.
AGT-989	The Month should be in 3 letter code in workflow status page.
AGT-1000	Clicking 2 times on action menu while the spinning wheel of the action menu
	is running is displaying 2 action menus.
AGT-1013	Error from Online Viewer when signing out with Firefox.



AGT-1042	Signature page is not of the same width as the main document
AGT-1047	Switching language on password reset page after having a validation issue on the new password generates an error.
AGT-1049	In add document form, changing from an artifact with only Draft status available to one with Final available too does not display the Final option
AGT-1065	Password verification in approval task is taking a long time to complete.
AGT-1068	Missing audit trail entry for the first user added to an organization.
AGT-1074	After switching to another organization, the workspaces in the workspace drop down selector are showing the ones from the initial organization for a few seconds
AGT-1075	Role of the user or Audience that the user is part of is missing in the audit log of the "task created" event.
AGT-1076	Review workflow is stopped still when a step contains an audience that does not include a group.
AGT-1077	Artifact links continues to apply on disabled countries.
AGT-1081	Managed files that are password protected in Online Viewer and online Annotations review process.
AGT-1095	Old fashion message is displayed when converting PDF on the fly.
AGT-1099	Keep track of the user account ID for each audit log entry
AGT-1106	Support of password protected files during PDF conversion, online view, online annotation review, approval with eSignature.
AGT-1127	Verify during workflow initiation that all properties and audiences used in the workflow steps are not empty
AGT-1184	New document created jobs are not being triggered when using import folder.
AGT-1185	If parent workspace is selected for a workspace, it is not possible to unselect it.
AGT-1188	Annotations - Review with Annotations and online Viewer does not work on iPads.
AGT-1198	Extended metadata is not always shown in document properties dialog and version history.
AGT-1223	Quick Filter - Error is sometimes displayed when filtering by country name.
AGT-1230	Views containing all of the columns are not displayed properly.
AGT-1241	Deleted items should not be copied to new workspaces (artifacts, views etc.)
AGT-1242	Annotations - Comment made on a "Combobox" make the parallel review to fail when integrating the comments back into the original document.
AGT-1251	In a document properties, the document link tab does not show up until clicking on another tab.
AGT-1252	Clicking on a document link in the document property page does not work.
AGT-1265	Folders created as part of placeholder(s) and document(s) creation should have Owner, Created By and Modified By set to System account.
AGT-1273	Making obsolete a document that was previously associated with a country- specific artifact fails.
AGT-1274	Excused placeholders are removed when an artifact is excused. They should not be removed.



AGT-1276	Quick filter - Date filtering on extended metadata should work the same way as the built-in metadata (with the date range selector).
AGT-1277	When a user does not have at least one organization that the user has access to, there is an infinite loop happening after login.
AGT-1278	Change Folders Owner, Created By and Modified By to System account, for folders created by the system.
AGT-1279	Search - the 'Blank' option is displayed in the list when filtering on Owner, Author and modified by fields.
AGT-1296	Folder import cannot import Zip files that contains long files names.
AGT-1297	Extended metadata are displayed as "invalid date" on Chrome for iPhone
AGT-1300	Annotations - The comments are integrated back into the word using the UTC time, instead of using the default timezone of the lifecycle.
AGT-1314	Saving a permission level is taking a long time to bring the user back to the previous screen (like 15 seconds).
AGT-1318	A user with a subscription expired on one organization cannot switch back to another organization once he tried to connect once to the expired organization.
AGT-1319	After a folder import, it is not possible to expand the imported folder from the tree view.
AGT-1321	A user with "Add document" permission on a folder should be able to add documents in that folder even if the user does not have the "Add document" permission at the workspace level.
AGT-1323	When moving a folder, sometimes the content of the original folder is displayed instead of the content of the parent folder after the move. Problem is fixed after navigating to another folder.
AGT-1324	It is not possible to change the document location from "/" to another folder or from another folder to "/".
AGT-1327	When importing a folder, the audit log entry of documents should include the zone, section, artifact and folder path.
AGT-1328	Artifacts links are not created for final documents imported using folder import feature.
AGT-1339	When a Users access (date in) to an Organization is not yet active, the user does not receive a message about this when signing in.
AGT-1362	When sending workspace notifications, the "to" field is not set.
AGT-1363	Time should be added to the user interface when displaying workspace notifications
AGT-1400	Permission Levels at a workspace level are not automatically synchronized when the synchronize option is enabled. They need to be manually turned off and on to work.
AGT-1404	Workflow - Version of a document should not change if there is no change of metadata.
AGT-1417	When importing files with accents or Scandinavian letters in their filename, the filenames get garbled.
AGT-1427	Web Form - Workflow history box is not the same width as the rest of the form in workflow tasks.



AGT-1433	Hyperlink metadata and Richtext metadata are not recorded in audit log at
	document creation.
AGT-1435	Pagination does not work well on translation keys in the workspace misc
	settings (translation tab). The last 2 keys of the first page are also as the first 2
	keys of the second page.
AGT-1456	Web Form - Discard check out option is not displayed when opening a form
	using the document link in views.
AGT-1462	In the import user wizard, uploading a wrong file type in the wizard generates
	an error, but the spinning wheel does not disappear.
AGT-1473	Sometimes cancel workflow operation throws an error to the user.
AGT-1474	Rich text fields and hyperlinks don't work in the import folder screen.
AGT-1491	Upload to Final is not available on new workspaces with no default lifecycle
	even if upload to final is set in the default organization level or global
	administration lifecycle (for Agatha Support only).
AGT-1493	Create from placeholder should not show the "Create from template" option
	if the corresponding artifact does not have "Create from template" activated.
AGT-1498	Cannot convert PDF that contains hyperlink (in some cases).
AGT-1500	In artifact settings, errors in another tab are not displayed when trying to save
	from the second tab.
AGT-1508	Filtering on a document name within a folder does not only display the
	documents included in the current folder.
AGT-1511	Extended metadata date is flagged as "modified" in the version history even if
	it did not change.
AGT-1514	Web Forms - Rich text is not automatically refreshing in views after saving.
	Page needs to be reloaded for it to show up.
AGT-1516	Workspace start date and end date are not properly replaced in the Microsoft
	Word document properties.
AGT-1519	Import folder does not work if the user does not have Import Permission at
	the workspace level even if the user has permission on the current folder.
AGT-1522	Error checking-in document "No rendition found".
AGT-1532	Web Form - provide the ability to define the height of the rich text metadata
	in the form definition.
AGT-1534	Mail sending error "Service not available, closing transmission channel. The
	server response was: Timeout waiting for data from client."
AGT-1544	Due dates don't taken care of the timezone of the user properly.
AGT-1563	Folder imports with many files(+200)/large(+200mb) zip files fail in some
	cases.
AGT-1571	If the metadata at the artifact level changes, ensure that this is taken into
	account when new versions of existing documents are created.
AGT-1584	In some cases, Folders can be deleted even if a workflow is running on a child
	item.
AGT-1585	Web Form - When sharing a web form, the email sent considers that it is a
	placeholder and suggests to upload the document. The message should be
	the same as when sharing a document.
AGT-1599	Upload new version - Allow the upload of large files (up to 2GB).



AGT-1653		Views within the audience are not copied from Organization to Workspace.
AGT-1676		When switching to another workspace, the list of attachments to a form is
		emptied.
AGT-1677		When closing a form after attaching a document, redirect the user to the
		form location.
AGT-1678		Version history does not include the details of the changes of attachments.
AGT-1679		Audit Log does not include the details of the changes of extended metadata
		(including attachments).
AGT-1680		Add attachment right panel does not show up in Dashboard view.
AGT-1681		Document Link metadata is not displayed in Document property regular view.
AGT-1687		When sending a second version of a web form that has a PDF rendition for
		approval, the approval workflow fails.
AGT-1688		PDF conversion of rich text included in web forms does not render properly.
AGT-1697		PDF conversion of Excel document fails in some cases.
AGT-1698		Date/Time is not shown in unambiguous format in some pages.
AGT-1700		Web Form - PDF renditions of forms are not displayed in Version history.
AGT-1705		Online Viewer - If the user does not have operation available on the
		document, the operation tab should be removed from the left panel.
AGT-1713		Word documents created from HTML files are not showing up in the Online
		Viewer.
AGT-1719		During the user import wizard, if an invalid email is included in the
		spreadsheet, there is no information on the error in the wizard. It just says "0
		row can be imported"
AGT-1739		PDF rendition does not appear when converting a web form to PDF until the
		user refreshes the screen.
AGT-1742		Online Viewer - Improve rendering (Text overlap and Fonts issues).
AGT-1750	4631	Resizing of columns is not possible when changing the zoom level on Chrome
		to a value different of 100%.
AGT-1763		Changing a site country is not removing the site folder structure from the
		original country.
AGT-1770		Logging issues with users who have not connected to Agatha since release
		2.0.
AGT-1838		In metadata default value, font size is bigger for lookup values.
AGT-1876		After sorting on a column on Safari iPhone / iPad, it is not possible to close
A CT 4000		the sort menu.
AGT-1899		Discard generated PDF should generate a new minor version of the document
		(with the rendition removed).
AGT-1907		Overlay is not applied when the document is created directly as final
ACT 1000		document.
AGT-1909		CMYK color option of PDF Rendering is not taken into account in some cases.
AGT-1912		Document link to a document from another workspace are not displayed in views.
AGT-1920		From a Task, clicking the document icon does not open the online viewer
//31 1920		when configured to do so.
AGT-1939		3 dots are added next to workflow status.
1 MO1-T322		S uses are added then to working status.



AGT-1966		PDF icon is greyed out after automated PDF conversion if the Microsoft Word
		metadata synchronization option is on.
AGT-1967		"Site" Level is not displayed in the selection of an artifact for an artifact
		group.
AGT-1972	4903	When clicking on a folder hyperlink, users should be redirected to a folder
		view with the folder selected.
AGT-1999		Approval workflow failed with "address cannot be null" error in some cases.
AGT-2021		Users with no permission on any organization and signing in for the first time
		ends up in a loop at the client selection screen.
AGT-2049		Error inserting comments in word document.
AGT-2066		Annotations - Integrating a comment back to word is failing when annotating
		a word field.
AGT-2324		When starting a review workflow with the option 'All Must Complete'
		disabled, other participants tasks are not cancelled when a participant
		completes his task.
AGT-2337		Blank statuses are displayed in change control forms in some cases.
AGT-2502		When adding a document And changing artifact from a site or country artifact
		to a corporate artifact, Site/Country information is stored on the document.
AGT-2521		Calculation of PDF page container in online viewer, showing the border of PDF
		pages is too big.
AGT-2524		Document Updated notification mail is sent in the wrong language
AGT-2656		Workspace export is stuck extracting in some cases.
AGT-2670		Cannot resize columns in chrome with specific screen resolution.
AGT-2680		When discarding minor versions, the version number is not immediately
		updated in the user interface. The documents view needs to be refreshed for
		the update to be displayed.