

## RELEASE NOTES SOLABS QM 10.9.0

**Status:** Approved & Effective

**Effective Date:** 2022-03-10

**Control Number:** N/A

**Version:** 3.0

### DOCUMENT INFORMATION TABLE

<b>Name</b>	Release Notes SOLABS QM 10.9.0
<b>Document Type</b>	Release Notes
<b>Description</b>	< empty >
<b>Control Number</b>	N/A
<b>Version (Internal Version)</b>	3.0 (3.0)
<b>Effective Date</b>	2022-03-10
<b>Next Review Date</b>	N/A
<b>Reason for Change</b>	<p>Include a header to identify difference between Version 2.0 and 3.0.</p> <p>Add more detailed information as follows:</p> <ul style="list-style-type: none"> <li>- add recipients for QMX-1283 under New Features (new Periodic Review notifications)</li> <li>- add row at UI Enhancement section for QMX-1283 modifications to Document notifications</li> <li>- add rows at Known Issues section for QMX-1283 corrections to Document notifications and to Training notifications</li> <li>- add section for SECURITY AND PERFORMANCE ENHANCEMENT to include QMX-1283 modifications to User Management notifications and to include QMX-1403 for correction of a performance issue</li> </ul>
<b>Originator (Author)</b>	gdixson@solabs.com (Gretchen Dixon)
<b>Document Owner</b>	FCT_Head of Client Success
<b>Document Coordinator</b>	N/A
<b>Unique ID</b>	68bf5658-c566-4635-9f8e-4848af49a585

### RELATED ITEMS

N/A

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### APPROVAL TABLE

Status <sup>1</sup>	Selected for Approval username (Full Name), Title	Approved By username (Full Name)	Meaning	Approval Date
APP	mboire@solabs.com (Martine Boire), <i>Head of Product &amp; Quality Management</i>	mboire@solabs.com (Martine Boire)	Approver	2022-03-10 14:14:51 UTC-05:00
APP	emoore@solabs.com (Ericka Moore), <i>Head of Client Success</i>	emoore@solabs.com (Ericka Moore)	Approver	2022-03-10 15:57:20 UTC-05:00

<sup>1</sup> Legend:

NS: Not Started

AWA: Awaiting Approval

APP: Approved

REJ: Rejected

STO: Stopped

EFFECTIVE

## RELEASE NOTES FOR SOLABS QM 10.9.0

Release Notes Status: FINAL with Version 2.0 for the October 2021 Release of 10.9.0

Version 3.0 includes the following additional information:

- Information for QMX-1283, related to modifications or corrections for Email Notifications. Version 2.0 included only the new Email Notification for the Document Periodic Reviews (under NEW FEATURE)
- Add QMX-1403

Internal Tracking (Ticket No.)	Area(s) Impacted	WHAT is new?	WHY?
<b>CATEGORY: <u>UI ENHANCEMENTS / ENHANCED USER EXPERIENCE</u></b>			
QMX-1283	Document	<p>The following email notifications will include the Comments that are entered when the document is rejected or when the cycle is stopped:</p> <ul style="list-style-type: none"> <li>• Document Rejected During Approval Cycle</li> <li>• Document Rejected on your Behalf (as part of your Role)</li> <li>• Document Rejected on Your Behalf</li> <li>• Approval Cycle Stopped with Comments</li> <li>• Document Rejected During Retire Cycle</li> <li>• Document Retirement Rejected on Your Behalf (as part of your Role)</li> <li>• Document Retirement Rejected on Your Behalf</li> <li>• Retire Cycle Stopped with Comments</li> </ul>	Recipients will be able to see the reason for the rejection or for the stopped cycle right in the email notification.
QMX-1374	General	Set the default view to “Outstanding” instead of “This week/last week”.	This will allow users to see all things pending for them, no matter when they are due. If too many come up, the other views can then be used to target tighter timeframes.

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QMX-1389	Training	Some updates to the Training Activity Page related to use of Questionmark OnDemand.	Questionmark OnDemand is now part of the Training Section for all clients who use it.
QMX-1394	Document	A “No file attached” option will hide the File section of the document Authoring page if there is intentionally no file attached as part of the Document metadata.	It was always possible to process a “document” without an attached file since it is useful for clients in some situations where they are interested in capturing other metadata only. This would be an issue if a file unintentionally not attached. Adding the “No file attached” option will result in a warning if a file is missing and the “No file attached” option is not selected.
QMX-1395	Reports	Update the SSRS Employee Training History report to remove the need to search for users by Department and to also be able to select Deactivated users.	This will make it easier to find and select Training History Reports for users and to see Training History for users who are deactivated or who have changed departments.
QMX-1433	Training	Updated Training Activity page to add support for use of embedded videos in Training Activities.	This will make it easier for videos to be linked to Training Activities.
QMX-1434	General	SOLABS Release Number will be displayed in the user interface.	This will allow users to know which version of SOLABS QM10 they are currently using.
<b>CATEGORY: <u>NEW FEATURE</u></b>			
QMX-1283	Document	New email notification for Periodic Reviews that are coming due and that are late. Notifications will go to Originator, Document Owner and Document Coordinator, where defined as attributes for the Document Type.	Document Type settings include an option under Effective Date section to define a default Periodic Review Cycle and the number of months prior to the due date when activity should be initiated, yet no email notification was tied to those settings.

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QMX-1301	Training	The Questionmark OnDemand feature for online assessments is now part of the Training Section for all clients.	<p>This feature was previously offered as an option, at an additional cost. It will now be available when clients choose to use the Training Section and for existing clients who are already using the Training Section. This is achieved through the use of a Shared instance where each client can create assessments in their own area. <a href="#">More on this...</a></p> <p>Clients who want to benefit from the full set of features offered by Questionmark may still purchase their own Questionmark instances and integrate those on their own. In such cases clients have to deal direct with Questionmark.</p>
QMX-1432	Document	When an Effective Date Delay is set for a Document Type, it will be the default selection when creating or modifying a document.	Effective Date Delays could be established for a Document Type, and were displayed as an option on the Authoring page but were not selected by default. Unless authors remembered to change the Effective Date selection, the Effective Date Delay would not be applied.
<b>CATEGORY: <u>QM APPS</u></b>			
<b>Document Control Process P0007 V3.1.1 to V3.2.0</b>			
SQP-4634	DOC Control Process	When a new document is created through the Document Control Process, set the default values from the Document Type (if any) for the Originator (Author), Document Coordinator and Document Owner.	Continuous improvement.

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SQP-4881	DOC Control Process	The Document Control Process will correctly handle the situation where the document linked as NEW or as a REVISION goes to a status of Superseded while the process is still open.	The process was stuck in Waiting, looking for the original document version that was linked. The only option was to put the process to a status of Cancelled.
SQP-5634	DOC Control Process	Character limit for document Name field in Step 1 for NEW documents is aligned with character limit for the Name field in the Document Section (256 characters).	To align with Document Section settings.
SQP-5636	DOC Control Process	Allow the possibility to start a new Document Control process to revise documents that are Approved & Effective, even if they are part of another open Document Control Process.	This will allow initiation of requests for the next revision of a document without waiting for the ongoing process to be at a status of Completed.
SQP-5693	DOC Control Process	Correctly handle versioning of a document linked in a DOC process even when it is Superseded while the process is still opened.	The DOC Process would be stuck in Waiting Document Approval if the document version linked to the process became superseded.
SQP-5804	DOC Control Process	For a Document Control Process where Type of Change = Revision, documents that have been superseded by another document will not be retrieved to choose from.	Documents superseded by another document would be retrieved for selection when they shouldn't be.
<b>CATEGORY: QM APPS</b>			
<b><i>Audit Process P0044 V3.0.2 to V3.1.0 (Update)</i></b> <b><i>Applies to existing clients having P0044 already installed.</i></b>			
SQP-5912	Step 1	Allow the 'How will Audit be Conducted' field to be customized with values from a configurable Custom List.	This mandatory field had only two set values of either On Site or Questionnaire.

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SQP-5913	Step 1	Active User lists will be displayed in alphabetical order for the 'Audit Lead/Host' field and the 'Team Members' field.	Continuous improvement; ease of use.
SQP-5952	Reports	SSRS Statistics per Year Report will work as defined.	It was not showing years after 2020 for selection.
SQP-5955	Reports	Correct the SSRS Step Listing Report to correctly display the Currently With parameter.	The value was displayed as N/A if the step was executed for the second time.
SQP-5957	Reports	Update parameters for SSRS Reports to include the Cancelled status.	Continuous improvement.
SQP-5958	Reports	Correct an issue with the SSRS Per Process Step Report when using the "Select All" option for the "Choose Department" parameter.	The Process Numbers would be duplicated in this situation.
SQP-5960	Reports	Changed © to Copr. in the footer on all the reports.	To facilitate deployment of reports for SOLABS. The symbol © causes an issue and requires manual modifications.
SQP-6041	Reports	New Macro-Enabled Report for the Audit Process (P0044)	Continuous improvement.
<b>CATEGORY: CORRECTION OF KNOWN ISSUES</b>			
QMX-366	Training	When a user has a failed result on a Training Activity, it will remain assigned. The number of attempts and the grade(s) obtained will be displayed in the View page.	When a user had a failing result on a training, the Training Activity would be reassigned but the assignment could be removed.

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QMX-735	Training	When a Training Activity Recurrence setting is modified from No Recurrence to Recurrence based on document revision, Exceptions (Automatic Records) will be created for Authors and/or Approvers if selected.	When the Recurrence setting was changed from No Recurrence to Recurrence based on Document revision, Exceptions (Automatic Records) were not being created when Author and/or Approvers were selected.
QMX-932	Training	Correction of a typographical error in the Pass Rate message for Questionmark OnDemand Assessments.	When linking a Questionmark OnDemand Assessment, the message under the Pass Rate field read <b>The Pass Rate has been taken form the selected assessment</b> instead of <b>The Pass Rate has been taken from the selected assessment</b> .
QMX-1220	Training	Exceptions (Automatic Records) work as defined when a Questionmark OnDemand Assessment is linked to a Training Activity.	Exceptions (Automatic Records) were not possible when a Questionmark OnDemand Assessment was linked to a Training Activity.
QMX-1260	Reports	For document-related training, the SSRS Employee Training Compliance Report will always display the correct version of the related document.	The version for the related document was not always displayed correctly when there were many cosmetic change versions.
QMX-1261	Reports	Correct a typographical error in the Cosmetic Change column of the SSRS Document Inventory Detailed Report.	Cosmetic was misspelled as Comestic.
QMX-1262	Reports	The SSRS Job Title Training Requirements Report will include document-related Training Activities for document(s) at an Approved, Not Effective status.	If the latest version of a document was at an Approved, Not Effective status, when linked to a Function Role, it was not being retrieved in the SSRS Job Title Training Requirements Report.



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QMX-1274	Reports	The SSRS Document Inventory Reports will display Approved, Not Effective versions of documents as well as Approved & Effective versions and the last In Process minor version.	The SSRS Document Inventory Reports were not displaying documents that were at an Approved, Not Effective status.
QMX-1283	Document	<p>The following email notifications have been updated to go only to approvers at the current Approval Cycle Level.</p> <ul style="list-style-type: none"> <li>• Document To Approve Due</li> <li>• Document To Approve Late</li> <li>• Document to Retire Due</li> <li>• Document To Retire Late</li> </ul>	The notification was being sent to all users in the Approval Cycle, even if the cycle was not yet at the Level assigned for some users.
QMX-1283	Training	The Due Date displayed in the notification for Assigned: Training Activity is corrected to be the Due Date set for the assigned user.	The Due Date that was displayed in the notification was the Start Date set for the Training Activity.
QMX-1290	Training	Exceptions (Automatic Records) will work as defined for all Assignment After Creation recurrence settings.	When Exceptions (Automatic Records) were selected for Training Activities with Assignment After Creation recurrence settings of either “Based on previous assignments” or “Based on previously trained” and the Author and/or Approvers were modified, the previous authors/approvers were receiving credit and the new ones were not.
QMX-1306	Training	Training Activities reassigned after failure of a Questionmark OnDemand Assessment will be accessible to the trainee.	A difference in Questionmark and SOLABS server time was causing an issue with failed assessments. The trainee was notified of the reassignment but was not able to access it.

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QMX-1326	Reports	The SSRS Document Inventory Reports will correctly handle special characters such as 'em dash' and apostrophes when copied from Word.	There were issues with the use of some special characters in Word documents.
QMX-1327	Training	A user that has a failing assessment will now be automatically reassigned without having to perform the Record my Training action. The Grade obtained will be displayed in the Training Activity view page and a message will be displayed to the user that the assessment was performed with a failing result and that it needs to be performed again.	The user was being directed back to the SOLABS QM Login Page and then to the Record my Training page, where they had to perform the Record my Training action before the Training Activity would be reassigned.
QMX-1329	Training	When a Training Activity is linked to a Questionmark OnDemand Assessment, the Record Training from External Record function will be hidden.	The Record Training from External Record function was not correctly working because Training Administrators have no way to see actual Questionmark OnDemand Assessment results for a trainee.
QMX-1363	Reports	The SSRS Training Compliance Report calculations will take into account completion of assignments on documents that are at an Approved, Not Effective status.	Percent Compliance calculations were not considering completion of a document-related Training Activity where the document was at an Approved, Not Effective status.
QMX-1378	Training	Questionmark OnDemand programming will be based on the SOLABS Unique ID instead of the Username.	Interface improvement.
QMX-1391	Reports	The SSRS Document Inventory Detailed Report and With DOC Process Info Report will work consistently.	These reports did not always work consistently if there was too much related data. (Corrected with 10.8.2; official with 10.9.0).

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QMX-1407	Reports	The DS_Workflow Report is updated to properly display only active review, approval and retire tasks.	There was an issue with the report that resulted in tasks still being displayed even after a version had been rejected or the cycle had been stopped. Tasks were also displayed as pending for users at a higher approval level than the current cycle.
QMX-1408	Reports	The DS_Document_Workflow report is updated to properly display the Approval Cycle Level.	There was no value displayed in the column <i>cycleLevel</i> .
QMX-1413	Reports	Excel DS_Process_Task Report will work consistently.	There were issues with this report that caused NULL values for Process Status.
QMX-1418	Training	Add the E-signature component for the Grade End Users function.	Training Administrators were not prompted to enter an e-signature when using the Grade End Users function.
<b>CATEGORY: <u>SECURITY AND PERFORMANCE ENHANCEMENT</u></b>			
QMX-1283	User Management	The following email notifications will no longer be sent to users with the SOLABS System Administrator role or SOLABS Help Desk role: <ul style="list-style-type: none"> <li>• AD Account Created</li> <li>• NEW AD Account Created</li> <li>• AD Account Activated</li> <li>• AD Password Reset</li> <li>• Account Login Type Modified (SOLABS Identity)</li> </ul>	This is to better protect the Temporary Password information that is sent to the user within these emails. They will only go to the impacted user.

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QMX-1403	General	If a user clicks on the same option multiple times, when experiencing a longer than expected response time, the request will go just once to the database.	Clicking multiple times was creating multiple requests to the system database, resulting in performance issues.

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