

Release Notes

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Pims Quality Management Release Notes

Read about new features & fixes for Pims Quality Management module.

Latest 24.04 Release

24.04 is the latest stable version of Pims Quality Management with over 25 new features & changes alongside continuous focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

Key highlights this month include:

- a range of new enhancements in ITP & Surveillance Register
- new multiselect custom fields managed from QM setup
- image pasting in key activity text fields & more

The full list of changes, fixes & improvements in 24.04 is available in the [update notes](#).

Past Releases

24.03

24.03 is the latest stable version of Pims Quality Management with 25 new features & changes alongside continuous focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

Key highlights this month are a significant improvement with side filter loading performance, the introduction of a new Action Register.

The full list of changes, fixes & improvements in 24.03 is available in the [update notes](#).

24.02

24.02 is the latest stable version of Pims Quality Management with 20+ new features & changes alongside continuous focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

The full list of changes, fixes & improvements in 24.02 is available in the [update notes](#).

24.01

24.01 is the latest stable version of Pims Quality Management with ~8 new features & changes alongside continuous focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

The full list of changes, fixes & improvements in 24.01 is available in the [update notes](#).

23.12

23.12 is the latest stable version of Pims Quality Management with ~20 new features & changes alongside continuous focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

This month focus has been in introducing cross domain possibility into Activities Register, Findings Register, Activities Plan and Dashboards applications.

The full list of changes, fixes & improvements in 23.12 is available in the attached [update notes](#).

23.11

23.11 is the latest stable version of Pims Quality Management with ~30 new features & changes alongside continuous focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

This month focus has been in enhancing and streamlining the Activity Details UI/UX.

The full list of changes, fixes & improvements in 23.11 is available in the attached [update notes](#).

23.10

23.10 is the latest stable version of Pims Quality Management with 10+ new features alongside continuous focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

A major new feature this month is the ITP Register optional integrations with Pims PES, Completion (P/o number, Checklist, Tags) and Document Control.

The full list of changes, fixes & improvements in 23.10 is available in the attached [update notes](#).

23.09

23.09 is the latest stable version of Pims Quality Management with ~30 changes focussed on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

Preparative work with the ITP Register started this month (with some preliminary changes going on with this Release) and will complete by next 23.10 Release.

The full list of changes, fixes & improvements in 23.09 is available in the attached [update notes](#).

23.08

23.08 is the latest stable version of Pims Quality Management with focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

Focus this month has been in implementing the new "Surveillance Plans" features under ITP Register, streamlining DCS Correspondence integration alongside continuous UI/UX enhancements .

The full list of changes, fixes & improvements in 23.08 can be reviewed in the attached [update notes](#).

23.07

23.07 is the latest stable version of Pims Quality Management with focus on security, stability, performance enhancement, UI/UX streamlining & overall quality enhancements.

80+ changes have been carried out since the last version.

The full list of changes, fixes & improvements in 23.07 can be reviewed in the attached [update notes](#).

2023.04

For a full list of changes and fixes addressed in this release, follow [this link](#).

New features

- **New Role: 'Findings Only'** ([@115968](#))
 - Support for a new role has been added - 'QualityMgmt - Findings Only'.
 - Users with this role can be set as responsible for Findings, and will only have access to Findings that they are responsible for. They will also have access to view the corresponding Activity.
 - This role currently does not provide access to any apps other than Activity Details, but will be able to navigate to their findings from the Pims front page, and links from notifications.
- **Confidential activities** ([@135382](#))
 - Individual activities can now be marked as confidential by clicking the 'Confidentiality'-icon on the toolbar.
 - By default, Confidential Activities will be visible to the following users:
 - Activity Responsible
 - Users responsible for Findings or Actions in the Activity
 - Users in the 'Involved Personnel' list.
 - QM Super Users and users with 'System Administrator' permissions (this is typically reserved for developers).

- Confidential activities will have a red 'Confidential'-badge visible in the Activity details app, in the Activity register, and in the ITP register.

- **Setup**

- 'Findings Classifications': It is now possible to set a finding classification as default. ([@154048](#))
Previously, all findings were classified as 'Observations'.

Changes and improvements

- **Activity details**

- 'Close out comment' will now be displayed in the right hand panel on closed activities where such a comment has been added. ([@161824](#))
A custom tooltip can be set up in 'Setup - Global' - 'Tooltips'

- **Activities**

- 'Registration Comments' is now available in the column chooser ([@161483](#))
- Users opening a link to an activity they no longer have access to will now receive a prompt that they no longer have access or the activity no longer exists, and be re-directed to the Pims home page. ([@163703](#))

- **Filter Panel**

- 'Contract Supplier' and 'Sub-supplier' are now available in the filter panel in both 'Activities' and 'Activities Plan' ([@156127](#))

- **Findings report**

- 'Closed date' is now visible in both the Findings-reports available from the 'Reports'-dropdown in the Findings register and the Activities register ([@156654](#))

- **Home Page**

- Dates will be shown in red font when the date has passed ([@156026](#))
Note that this app will not apply the highlighting rules that can be configured in the setup.

- **Setup**

- 'Activity Sharing': Super users no longer need access to the domains that they would like to share activities to ([@156125](#))

- **Setup - Global**

- Added styling to highlight the selected row in all grids ([@162564](#))
- Tooltips can now be customized for 'Activity Actions' and 'Comments' ([@145195](#))

Bug fixes

- **Activity actions**

- Assignee notifications: Fixed a bug where the URL in the notification email sent when assigning an action would contain an incomplete activity number ([@163637](#))

- **Setup - Global**

- Fixed a bug where the checklist items of nominated checklists would not be displayed ([@162564](#))

- **ITP Register**

- Fixed a bug where QM activities were connected to the wrong ITP Activity. [@162870](#)
This error could occur if an ITP Activity with QM Activities was deleted, and a new ITP Activity with the same ID was created.
Existing QM Activities from the deleted ITP Activity would then be connected to the newly

created ITP Activity.

2023.03

For a full list of changes and fixes addressed in this release, follow [this link](#).

New features

- No new features were added in the March update.

Changes and improvements

- Activities
 - Filter panel: Types and Sub-types with long titles will now longer be truncated to '...' on small screens/narrow browser windows ([@158864](#))
 - Findings dialog: It is now possible to select the text in the title by clicking and dragging with the mouse pointer, without moving the dialog. Previously, the 'draggable'-setting would hijack the mouse pointer ([@159276](#))
- Activity details
 - Side panel: Two additional customizable check boxes can now be enabled in 'Setup - Global'. ([@119929](#))
When enabled, these columns can also be made visible in the **Activities** list.

Bug fixes

- Activity details
 - Send Notification and Send Report: Including checklists as attachments with notifications now works as expected. Previously, users would ensure that they clicked just outside the list of checklists for the checkbox to be "saved" ([@156851](#))
 - Agenda: Fixed a bug where users would get a message about 'unsaved changes' when trying to add checklists to an agenda item, or when trying to remove a previously added checklist ([@140277](#))
- Dashboard:
 - Fixed an issue that would cause the dashboard to not load for normal users ([@157941](#))

2023.02

For a full list of changes and fixes addressed in this release, follow [this link](#).

New features

- Linked Applications ([@36387](#))
 - The 'Linked Applications' functionality can be set up to create links to any source in Pims
 - Setup is Global (shared across domains)
 - A Linked Application look-up source can be enabled for Activities, Findings, or both.
- Look-ahead, 6 months
 - Double-clicking an Activity will now open the Activity details form in a new browser tab ([@149265](#))

- QBS codes and Program are now available in the filter dialog ([@10017](#))
- ITP register
 - It is now possible to assign an ITP Coordinator for ITPs ([@149274](#))
 - ITP Coordinators can find and navigate to their ITPs from the Pims web front page ([@150647](#))
 - Added support for sorting ITPs by progress (%) ([@151516](#))

Changes and improvements

- Activity details:
 - In the 'ITP Registration' section, only open ITPs will now be shown in the dropdown ([@150133](#))
 - Unified look for Disciplines and Requirements in all forms where these are used ([@150814](#))
- Dashboard:
 - Added option to filter on inactive QBS-codes for ITPs ([@150796](#))
- Setup:
 - When 'Use QBS Tree' is enabled, deleting QBS codes on levels 1 and 2 should no longer leave orphaned data on the lower levels ([@150097](#))

Bug fixes

- ITP Register
 - Minor visual modification to avoid overlapping tooltips ([@149315](#))
- Look-ahead, 6 months
 - Fixed a visual bug where the text relating to an activity (date, title, supplier) in some rare cases was not displayed ([@149471](#))
- Pims web "home page"
 - Fixed a bug where duplicates rows were shown for users responsible for checklists ([@150777](#))

2023.01

For a full list of changes and fixes addressed in this release, follow [this link](#).

- **Activity details:**
 - Items in the right hand panel (Risk actions, Links, Attachments, etc.) will now have scrollbars when reaching a certain number of items.
This is in order to improve handling of high zoom levels in web browsers ([@147921](#))
 - Findings - requirements: Fixed an issue where requirements with long names would be hidden behind other elements in the form. Long text will now be wrapped ([@147160](#))
 - When enabled in setup, the Assurance Report can now be sent as either PDF (default) or Docx ([@145474](#))
 - When enabled in setup, the Notification Letter can now be sent as either PDF (default) or Docx ([@148915](#))
- **Activities:**
 - The descriptive name of domains is now available in the column chooser ([@147231](#))
 - Columns 'Status', 'Responsible', and 'Deadline' have been added to the Findings grid in the details panel ([@136147](#))

- **Activities Plan:**

- Domain name is now included in the filter panel ([@147231](#))
- An 'Open Activities Register'-button has been added, making it possible to open the **Activities** register using the current filter directly from Activities Plan ([@145596](#))
- Columns 'Status', 'Responsible', and 'Deadline' have been added to the Findings grid in the details panel ([@136147](#))

- **Activities - Import and copy:**

- Fixed a bug where no rows were shown after successfully importing data from the Excel template ([@147376](#))
- The import procedure has been re-written to not require elevated (developer) permissions ([@147376](#))
- Fixed a bug where Activities copied from other domains would not have correct QBS values and Type/Sub type ([@146588](#))

- **Findings register:**

- Columns 'Closed Date' and 'Closure Comments' are now available in the column chooser ([@147013](#))

- **ITP Register:**

- ITPs now have a progress column, showing the percentage of closed ITP Activities ([@147233](#))
- Added styling to make it easier to see which ITP and ITP Activity is selected in the respective grids ([@147233](#))

- **Setup:**

- A field has been added, allowing the type of Correspondence to be used when the option to send reports using DCS has been enabled ([@140288](#))
- **Participant Roles** and **Disciplines**: Global values will now be shown by default, with a page-size of ten items per page ([@135552](#))

- **Dashboard:**

- Fixed a bug where an error would be thrown when a filter returns no data ([@148242](#))
- 'ITP Progress bar chart' has been added, showing progress aggregated on QBS level 1 ([@147212](#))
- Added support for showing charts for configurable custom checkbox 3 and 4. Previously, only checkbox 1 and 2 were available ([@147170](#))
- Added a chart for overdue Activities ([@147234](#))

- **Key statistics:** Fixed a bug where an activity shared with other domains would be counted several times, thus showing a higher number of activities ([@148448](#))

- **Other**

- **Pims Home-page:** The types of assigned tasks (e.g. 'Finding', 'Participant', etc.) are now included as search keywords ([@135188](#))

2022.12

- **Activity details:**

- When closing an activity, the feedback to the user is now styled to indicate a successful operation, and not look like an error message. ([@144134](#))
- Fixed a bug where sharing an activity would fail if the receiving domain is a number ([@143982](#))

- When selecting a sub-type where 'Contract' is not *required*, the value of the 'Contract'-field will no longer be cleared ([@140189](#))
- **Execute Activity:**
 - The Execute Activity-application now supports checklist ID as part of the URL, so that the clicked checklist is automatically selected when following a link ([@144367](#))
 - Fixed a bug where where the all items in a checklist would be counted towards the total, when only items marked with 'Use' should be counted ([@144414](#))
- **Filter panel:**
 - Inactive **QBS** codes will no longer be displayed in the filter panel in domains that are not using the QBS tree-structure. ([@141950](#))
 - Support for filtering on **ITP** has been added ([@82286](#))
- **Activities:** The columns Created, Created By, Updated, and Updated By can now be displayed in the grid ([@142149](#))
- **Findings register:** The columns Created, Created By, Updated, and Updated By can now be displayed in the grid ([@142149](#))
- **ITP Register:**
 - Fixed a bug in the 'Company Doc no'-modal where the save- and cancel-buttons were not activated after changing the document number ([@143426](#))
- **ITP Activities:**
 - **Criticality** can now also be set on **ITP Activity**-level ([@143183](#))
 - Added the following columns: Country, Supplier, Acceptance Criteria, Purchase Order Name ([@143183](#))
- Other: asp_QualityMgmt_EnsureRolesTablePermission will now set permissions on key reports ([@140268](#))

2022.11

- **Findings:** Added an option to set 'Severity Level'. ([@135959](#))
This feature can be enabled on individual domains in '**Setup**'.
Severity Levels can be edited in '**Setup - Global**'.
- **Findings Report:** The Findings' 'Closed Date' is now visible in the report ([@139359](#))
- **Activity details:**
 - The assurance report in the 'Reporting'-step now includes the status of Findings. ([@135378](#))
 - Fixed a bug where not all tooltips were loaded. ([@139039](#))
- **Activities Plan:** When viewing a large number of items, Activities that are in close succession on the timeline will be grouped in clusters, depending on zoom level. ([@136503](#))
This is to prevent the web-browser from becoming un-responsive due to the high load.
Up to 15 activities will be displayed in a tooltip when hovering the mouse pointer over a cluster.
- **ITP Register:** Added ExternalID to ITP table. ([@139916](#))

2022.10

- **Activity details:**
 - Fixed a bug where links to Risk Actions would point to the wrong domain ([@134905](#))
 - Fixed a bug preventing Actions from being closed ([@133513](#))

- **Notification Letter:** Fixed a bug where dates would be sorted alphabetically rather than chronologically ([@133936](#))
- **Activities:** The column 'Requested by' is now available in the column chooser ([@133939](#))
- **Findings:** Fixed a bug where Findings could not be closed due to open Finding Actions (deprecated feature) ([@134028](#))
- **Finding Notification:** Fixed a bug where the user's login would be used as receiving address instead of the user's email address ([@10017](#))
- **ITP Activities:** Fixed a bug where additional indentation/whitespace would be added to input text ([@134982](#))
- **Disciplines:** The 'Inactive'-column is now visible by default in both '**Setup**' and '**Setup - Global**' ([@134333](#))
- **Checklists:** Checklist items can now be marked with 'Item Owner' (free text) and 'Detail Level' (lookup from '**Setup - Global**' ([@126894](#)))

2022.09

Activities

- Details panel: The event log has replaced the detailed change log as default history. Detailed change history is still available as a sub-tab in the details panel.

Activity details

- You can now navigate to the Execute-app from the 'Checklists' drop-down menu.
- The 'Deadline'-column is now available in the Findings-grid in the Reporting step.
- When a Quality Management activity is connected to an ITP activity, the ITP activity controls the planned dates for execution.
 - This means that the dates are not editable in the Activity details-app.
- When connecting an Activity to a Risk Action, only Risks that actually do have Actions are listed in the drop-down.

Execute Activity

- Additional fields are now available in the Details-tab, allowing the user to add details to the Reporting-step as part of the activity execution.

ITP Register

- Notification of Inspection (NOI) reference can now be added to ITP Activities.
- The register is now also available to all Quality Management users. Only super users have update-permissions.
- Support has been added for customizable validation of various data in ITP-activities.
- ITPs can now be connected to a DCS document using either free text, or a lookup.
 - **Note to implementers:** The lookup is not directly connected to DCS tables, but uses interface-tables as a go-between. Code to populate these interface tables are not supplied as part of the product, and must be implemented locally. The following objects are required for this functionality:

- atbv_Interface_Documents
- atbl_Interface_DocumentsApplicableTo

Import & Copy

- Activity Checklists can now be included when copying activities from another domain.
- Removed some columns from the Excel-template that could cause unpredictable behaviour when importing.
- Bug-fixes to the import from Excel.

Setup

- Checklist tab: Fixed a bug where imported checklist items would refer to an invalid parent checklist.

2022.08

Activities

- Detailed Log: Fixed a bug in the detailed change log for Checklist items.
- Findings: The 'Description' column is now also available in the 'Follow-up' step.

2022.07

Activities

- Added detailed logging of changes to checklists and checklist items. These can be viewed in the 'Logs' > 'Detailed log'-tab in the activity form.
- The 'Send notification letter' and 'Send report' dialogs now allows users to select checklists, which are attached to the sent e-mail.
- Fixed a bug where 'Sub Type' could be left blank when closing the 'Registration'-step. This caused issues for the logic checking whether 'Contract' should be required, as this is dependent on the configuration of the 'Sub Type'.
- Checklists:
 - 'Question' has been renamed to 'Item Description'
 - 'Question to' is hidden by default.
 - 'Checklist Responsible' is available as a role in 'Involved Personnel'
 - Checklist items no longer have a default value, forcing a conscious choice of 'Checked', 'Unchecked', or 'N/A'.
 - The options 'Unchecked' and 'N/A' require that a comment is added, documenting a reason for selecting this option.
 - The 'Reporting'-step cannot be completed while there are outstanding items in a checklist
 - 'Unchecked' and 'N/A' are considered valid outcomes as long as a reason is added to the items' Comment.

Activities list

- Fixed filtering bugs when viewing the list in card view (adapted for smaller screens)

Activity Checklists

- **New app**, which shows all checklists that have been added to an activity.
Allows for simpler overview and navigation to the 'Execute activity'-app.
- Shows as list view on smaller screens, better suited for e.g. tablets.
- Possible to assign a 'Checklist Responsible', selectable from a drop-down. The drop-down shows users listed in 'Involved Personnel'-section of the QM activity.
 - Only users with access to the QM module are eligible.

Execute Activity

- Supports new role, Inspector.
 - Inspectors have access to 'Activity Checklists' and the 'Execute Activity' apps. They do not have full access to the related QM activity.
- Shows checklists in a format suitable for portable devices.
- Users can also navigate to checklists they are responsible for from the list on the Pims web front-page.

ITP Register

- The following columns have been added to ITP Activities: Tag No, WBS No, Activity Location, Additional Reference, and Purchase Order.

Setup - Program

- Added a report option that includes Findings, available in the 'Reports' drop-down.

Dashboard

- Added a chart showing number of cancelled/waived activities in %.

2022.06

Activities list

- Details panel: Added a button to load detailed change log on demand.
- The 'Status' column now supports batch-updating, making it possible to change the status of several activities at once.
 - Note that this is only available when the 'Force the use of activity close-out comment' is turned off in Setup.

Setup

- The 'Mail Notification'-tab now has a 'Report notification subscription'-section.
Users added to this setup will appear as recipients when the 'Notification letter' and/or Assurance report are sent.

Setup - Global

- Added two customizable checkboxes.

- Visible in the side panel of Activity details and in the Activities list when enabled.
- The ITP Setup-section now supports adding pre-defined values for Control codes.

Activity details

- Closed dates are now cleared when re-opening a closed or cancelled activity.
 - **Note to implementers:** Transaction 3584 contains a script that updates ClosedDate and VoidDate according to status.
- See [@115776](#) for details.

Execute Activity

- Fixed a bug in the logic counting checked vs unchecked items in checklists.

ITP Register

- Control code values can now be selected from lookups, if these have been configured in 'Setup - Global'
- 'Involved Personnel' is now in a tab, instead of in a grid at the bottom of the form.

Activity Statistics

- Will now use the correct column for 'Cancelled' activities. When enabled

Other

- All pop-up dialogs can now be moved by clicking and dragging.
- **Note to implementers:** asp_QualityMgmt_EnsureRolesTablePermission may be run to update permissions on stbl_Mail_Messages%-tables, if needed.

2022.05

Activities list

- An 'Add multiple'-option has been added, making it possible to create a batch of activities at once.

ITP Register

- When selecting a contract, the descriptive name of the contract and its' related supplier is also displayed.
Contract number is available in the ITP grid and side panel.
- A closed date can now be set on ITP Activities.
 - Closed date cannot be set when there are open QM activities related to the ITP activity.
 - When Closed date is set, new QM activities cannot be created against the ITP activity.

Setup

- Updated information in the 'Mail notification' tab to reflect that overdue-status is now tracking on planned end date.

Setup - Global

- Findings classifications can now be customized.

Findings

- Added an option to send a reminder to a finding responsible when the finding's due date has passed. The notification uses a customizable template.

Note to implementers

- All data will now be treated as read-only when their related domain is set as archived.
 - See [@112390](#) for details.
- Updated the moment.js-library.
 - See [@115102](#) for details.

2022.04

Activities

- The system will now use the planned end date for tracking overdue-status.
- Disciplines now show both the discipline code and the descriptive name.
- Added new columns to indicate when and by whom a checklist item was set to 'Checked' or 'N/A'.
Setting the value to 'Unchecked' will clear the 'Checked by' and 'Checked date' columns, and the item will be considered not addressed.
- Fixed a bug where the 'Assignment' text input was not displayed in the 'Assignment notification' preview.
- Actions can now be assigned on Activity Level.

Activities list

- The 'Closed Date'-column is now available in the columns chooser.
- Improved handling of long QBS codes in the filter panel (these will no longer be completely truncated on smaller screens/small browser windows).

Other

- Fixed a bug that would allow multiple rows in the atbl_QualityMgmt_Constants table.
 - **Note to implementers:** Transaction 3172 in af-updater contains a script that raises an error if duplicates exist.
- ITP Register: ITP Activity start and end dates are now available in the register.

2022.03

Activities

- Involved Personnel: a 'check/uncheck all' feature has been added to all columns with check-boxes.

Activities list

- ITP Control codes: The column chooser and column headers will now display the custom names as set in the setup.

Setup

- Types/Sub types (Global setup) and sub sub types (domain specific) can now be deleted when not used in activities.
- Added options to notify users when Activity Responsible and Finding Responsible is set or changed.
 - Note to implementers: SQL Before was added to transactions 3154 and 3153 that will update the table in the event updaters are not applying changes in the ProjectSetup namespace.

Note to implementers

- astp_QualityMgmt_InitNewSolution has been updated, and can now be used to initialize installations where QM has not been used previously.
 - This only populates setup-data, and does not include creation of database objects - these must already be in place.
 - It is required that some 'global template' domain exists and is referenced in atbl_ProjectSetup_GlobalSettings.
 - See [@102812](#) for details.

2022.02

Setup

- An option has been added to enforce a close-out comment if the Activity is set to 'Closed' or 'Cancelled' before reaching the Follow-up step. Cancelling an activity while in the follow-up step will also enforce a close-out comment.

Setup - Global

- Added a new tab, '**ITP Setup**', allowing the setup of custom labels for the control code columns. The custom labels are used in the **ITP Register** and in the ITP section of the QM Activity details form.

ITP Activities

- An option has been added to set ITP Activities as Complete.
- Before an ITP Activity can be set as Complete, all related QM Activities must be completed.
- The dialog for generating QM Activities from the ITP Activities will not include ITP Activities marked as Complete.
- A column has been added to the ITP Activities grid showing the number of completed QM Activities and the total number of connected QM Activities.
- Removed Closed ITP activities will not be displayed in the lookup of ITP activities in the QM Activities details page

2022.01

Activity details

- The global setting 'Require Contract', when enabled, now makes the Contract-field required. When disabled, the Contract field will still be visible, but not treated as a required field.
- When closing the Reporting-step and a company team has not been set up properly, the user is now provided with a more useful error message.
- Lookups that are empty due to missing setup now contain a more informative placeholder text.

Execute Activity

- Findings can now be created directly from the checklist.

2021.12

Activities (details)

- Distinct filter for requirements were added to the findings grid in Reporting step
- Contract field will now always be available, including on activities where the contract is not required
- Information on why there may not be any data available has been added to relevant lookups

Activities (list)

- Button added to take the user directly to the activities plan with the current applied filter.
- A chart showing the quality breakdown structure was added.

Findings

- Requirements, QBS and ITP columns were added to the grid.
- Possibility to delete findings was added.

Setup

- QBS that are in use (on an activity or an ITP) can no longer be deleted. These elements can be set to "Inactive" to exclude them from future use if needed.

ITP Register

- The fields 'Description', 'Procedure', 'Record' and 'Requirements' on ITP activities have been expanded and can now hold up to 1000 characters.
- Improvements have been made to the 'Generate quality activities'-dialog to prevent accidentally generating duplicates.

Other

- Dashboard: Links to activities list have been added to all charts and tables.
- Copy activities: Program can also be included as part of the meta data when copying activities

2021.11

Activities (details)

- Finding attachments are now available as additional attachments when sending emails.
- The Notification-step will now display the last time the Notification-letter was sent, with a link to open the email history for further details.
- The browser's built-in spell checker is now available in input fields with text formatting.
- Clicking the name of the Activity responsible in an email downloaded from the Email History will generate a new email with the activity's title as subject, in the format 'Re: <Title of Activity>'.
- The Assurance report can now be configured to be previewed using the Docx template.
- When a Planned date for execution has been set, the Reporting date cannot be set to a date prior to the execution date.
- The appointment in the calendar-file downloaded from the side-panel will now default to 'All day'.

Activities (list)

- Fixed a bug in the Details panel that would prevent users from changing Responsible and Requested By.
- Fields in the details panel can only be edited when the user has editing permissions and the activity is not shared from another domain.

Findings

- The 'Internal' column is now available in the Findings grid.

Other

- The lookups for Responsible in Activities and Findings has been tuned for improved performance.
- Setup for Planned date highlighting (red and yellow) is not part of the general Domain Settings, in stead of having its' own tab.
- Criticality can now be defined in Global Setup and applied to ITPs.
- Checklist Items can now be imported using support for importing from/exporting to Excel built into the Pims framework.
- ITP register: The side panel is now shown by default.
- Setup: The 'Focus Areas'-tab is only visible when the 'Use Focus Areas'-setting is enabled in the 'Domain Settings'-tab.

2021.10

Activities

- 'Activities List' is now called 'Activities' in the menu.
- Introduced a Skyline view.
 - The Skyline view can me shown and hidden by clicking the corresponding button on the toolbar.

- The Activity skyline can be downloaded as an image file showing only the skyline, or as a PDF that includes a list of the activities displayed in the skyline.

Activity details

- When sending the Assurance report as e-mail, the generated report will now only list the actual attachments selected to be included in the email, rather than listing all attachments that exist for the activity.
 - The way attachments are selected has been re-designed to be quicker when adding multiple attachments.
- Email history now displays a list of attachments sent with the e-mail.
- ITP activity revisions is now supported.

Execute Activity

- First version. This app is intended to be used for executing the activity.
- The app scales with the type of device being used, especially with handheld devices in mind.

Activities Plan

- The domain name will now be displayed when viewing items from all domains.

ITP Register

- Added support for ITP Activity revisions.
- Created/Updated-columns are shown for each revision.

Other

- Dashboard: Colours and charts have been updated.
- Copy Activities: The column Classification has been renamed to Type.
- Program Setup: Clicking the ?-icon will now navigate to the corresponding user guide.
- General improvements and bug-fixes.

2021.09

Activities

- Selection of QBS-values and Type/Sub-Type/Sub-sub-type has been re-designed and relocated from the Registration-step to a set of compact lookups just below the Title-field.
 - This simplifies the selection of values that are organised in a hierarchy by providing a tree-view of the available options.
 - Refer to the product documentation for further details.
- Agenda points can now be added and edited directly in the grid, rather than having to rely on a pop-up dialog.
- Html-formatting tags are no longer shown in the notification email preview (shown when completing the Registration-step).
- Findings grid:
 - Added the 'Findings responsible'-column to findings grid in the reporting step.

- Additional columns have been opened for editing.
- Buttons in the details panel have been adapted for smaller screens.

Activities List

- Added sub-sub-type column to the grid.

Activities Plan

- Added an option to generate a PDF of the displayed timeline, including a list of the relevant Activities.

Look-ahead, 6 months

- Improved layout in tooltip-cards, with better handling of long titles.
- The search-function in the list of projects in the filter dialog has been improved.

ITP Plan

- Added Contract Title and Supplier to the grid.

Other

- Added a solution-wide configuration option to enable using/previewing Notification Letter and Assurance report based on docx templates.
- Clicking the '?'-icon in the toolbar will now link directly to the relevant section in the user documentation.

2021.08

Activities

- Changed the title from "CMS Planning activities" to "Linked Activity" and added a "Auto-update" checkbox and a date offset input field.
 - The field is shown and hidden based on the new "Enable activity linking"-setting.
 - The lookup includes CMS activities if this checkbox is also turned on in the setup.
 - 'Auto-update' will cause the planned dates to be automatically updated with values from the linked activity, adjusted for Offset, if provided.
 - An offset can be set to adjust the planned dates forwards or backwards relative to the linked activity's dates.

Activities List

- Fixed a bug where tooltips would not display correctly because of window size.
- Details panel: The rich text editor controls in the text box for Scope are now hidden as long as the text is not being edited.

Activities Plan

- Activities are no longer represented as circles, but are now displayed as date bars to show more clearly when an Activity spans more than one day.
 - Single-day activities are subsequently displayed as a single-day bar.
- The color scheme has been updated.

Findings List

- 'Focus Area', 'Checklist Question', attachments and links are now displayed in the details panel.

Findings

- Findings can now be categorised using Mitigation Categories.
 - This option is only displayed when the corresponding option is enabled in Global Setup.

Global Setup

- Added checkbox for "Enable Activity Linking"
- Changed the name of the "Use CMS Activities"-checkbox to "Include CMS activities in linking activities" and set it to be shown or hidden based on whether the "Enable activity linking" is turned on.
- Added an option to enable and disable 'Mitigation Categories' for findings.
 - When enabled, a setup-tab is made available for editing the available categories.
- A sort-order can now be set on Statuses, allowing custom sorting.

Setup

- Added additional explanatory text to the 'Import setup'-dialog.

Other

- General improvements and minor bug-fixes.
- The option to enable and disable the ITP functionality has been moved from Global Setup to the domain-specific setup.

2021.07

Activities

- Added tooltip and additional explanatory text to the 'Copy Activity'-button.
- Fixed a bug where an Activity would move to the Reporting step and at the same time make the Reporting step unavailable because this step is not part of the selected sub type.
 - This would occur when the activity was in Notification and the sub type was changed to a sub type that does not include the Notification and Reporting steps.
- Added support for automatically setting statuses based on step progression:
 - Progressing to Reporting will set the status to 'Ongoing'.
 - Progressing to Follow-up will set the status to 'Reported'
 - When automated status-changes are not switched on, the user will still get a visual cue if the activity has progressed beyond the Registration-step and Status is still set to Planned.
- In the 'Edit Checklists'-modal, the 'Add from list'-button has been moved, for better visibility.

- Planned End Date is no longer a required field.
- Planned End Date is set when Planned Start Date is set, making it quicker to select an end date close to the start date.

Activities List

- Made the 'Notification Sent'-column available.
- Made custom checkbox-columns available, when active.

Activities Plan

- Fixed a bug where milestones would not be filtered on Domain when 'Show items from all domains' was checked.
- QBS will be hidden when 'Show items from all domains' is checked, showing a filter node for Domain in stead.

Setup

- Added options for enabling or disabling automated statuses in the Domain Settings-tab.

Global Setup

- Added setup-tab for holidays, used for net overdue notification calculations in the dashboard.
 - The tab is hidden when the option is turned off.

Look-ahead, 6 months

- Added Activity Responsible and Involved Personnel to filter modal.

Other

- ITP Register: Added QBS to the grid.
- Updated to support Highcharts 9.1.0

2021.06

Special Note

- **Breaking change:** As part of product development in the Cost Management-module, the entire PC-namespace has been deleted from Stage.
These are the relevant tables and their replacements:
 - **atbl_ProjectSetup_Milestones** replaces **atbl_PC_ProjBaseline_Milestones**.
 - atbl_CostMgmt_Contracts_Contracts** replaces **atbl_PC_Contracts_Contracts**.
 - atbl_ProjectSetup_Companies** replaces **atbl_PC_Contracts_Suppliers**.
- Note that the PC namespace purge **will not** be pushed to client solutions.
Similarly, affected items in the Quality Management module will not be pushed automatically through the updater tool, but steps should be taken to prepare your client's solutions to accommodate moving away from the PC namespace.
For Release 2021.06, checks have been added to the updater transactions that forces the user applying the updates to take deliberate action before applying updates that depend on the new

database objects.

Activities

- Risk Actions-link has been moved to the side panel.
- Added a preview of the Assignment-email when completing the Registration step.
- The lookups for Activity and Finding responsible will not show users with read-only permissions.
- The 'Internal'-column is now displayed in the Findings-grid in the Follow Up-step.
- Implemented the 'Copy Activity'-functionality. The copy will contain the main information from the original, with the default status (Planned).
- Fixed an issue where menu items in drop-down menus 'Shared with' and 'Checklists' disappeared outside the browser window.
- Any files attached to the Activity can now be selected as additional mail-attachments when sending the Notification Letter and Assurance Report.
- Added check-buttons to checklist items.
- Email files are included in the mail history.
- A timestamp is now recorded when notification is sent.

Activities List

- Removed the 'information'-icon and corresponding tooltip from the Risk IDs column header. The information it provided is no longer needed.
- 'Planned Date' has been renamed 'Date for Execution' in column header of Activities list, as well as in Details Panel of Activities List, Activities Plan and 6 Month Look-ahead.
- Improved handling of long tooltips in the filter panel, preventing the tooltips from being rendered outside of the visible area.
- Fixed an issue where menu items in drop-down menu 'Reports' disappeared outside the browser window.
- The button toggling Details panel is now styled as active when panel is shown.

Findings List

- A details panel has been added.
- Fixed an issue where menu items in drop-down menu 'Reports' disappeared outside the browser window.

Copy Activities

- The 'Program'-column was added. Improved filtering via drop-downs added to several columns.
 - Note: The framework will clear all checkboxes when the filter is changed.
The implication is that the user cannot set a filter, select a few activities, then change the filter and check off additional activities.

Setup

- Added a setup option for notification due date (number of days).
- The caption 'Participant Roles' was renamed to 'Domain Participant Roles', for clarity and consistency.

Global Setup

- The 'Customize global functionality'-tab has been renamed 'Global Settings'
- Updated text in tooltips
- Updated global setup page for tooltips (mainly visual)
- Created a tooltips update procedure for convenient deployment to clients.

Look-ahead, 6 Months

- Individual items will now has the following format: <Planned date of execution>: <Domain> - <Title> (Supplier: <Supplier Name>), e.g. "13.05.2021: Balder - Checking material (Supplier: Simex A/S)"
- Added a Details panel

Key Statistics

- 'Execution date changed' changed to 'Activities with delay(s)'
- Correction to links to Activities List.

ITP Register

- Names in Involved personnel can no longer be changed after saving.

Other

- Fixed a bug where an error would be thrown when trying to replace an Activity or Finding Responsible where the login had been deleted from the Users-table.
- Implemented a 'solution settings'-table, allowing the use of customized reports for Notification Letter and Assurance Report without the need to make code changes after product updates.
 - Note that this is not a user-editable setting, but is a part of the configuration that must be handled by a systems engineer or developer from Omega if there is a need to deviate from the default setting.
- The data-model has been updated to ensure that related data (participants, disciplines, etc.) is deleted along with the Activity.
- Note to updaters: Third party components are now handled in '[bundles](#)' rather than content delivery services.

2021.05

Special Note

- The changes to the Read Only-role from release 2021.04 have been rolled back.
 - A new system role, 'QualityMgmt External (Read Only)' has been configured to fill the function of allowing external parties limited access to Quality Management Activities.
 - Limitations imposed by the 'QualityMgmt External (Read Only)'-role are now overridden if a user is also given a system role with a higher access level.
 - For further details, please see the release notes for release 2021.04.
- Note when updating: The new version of TinyMCE is distributed in a [bundle](#) under the General namespace. Make sure to apply General updates, or ensure that a similar bundle is present in

your solution.

Activities

- Toolbars for formatting rich text are now only displayed when the user clicks the text-area, causing less visual clutter.
- The rich text editor component has been updated from v4 to v5.7.1.
- The lookup to connect a Finding to a Checklist item now includes the checklist item ID.
- The columns 'Response' and 'Comments' are now available in the Findings-grid.
- Some ITP-related functionality moved from the front end to database-triggers.
- Fixed a bug where users would not be able to add links to Findings.
- Fixed a bug where the wrong name would be displayed as 'Created by' in the Event Log.

Activities List

- Added support for displaying custom text fields, when this option is activated.
- Filter handling has been partially rewritten for improved integration with the Appframe framework.

Activities Plan

- The wording for including the date range in filter has been changed to 'Show activities within time range', for consistency with other checkboxes relating to filtering.
- Fixed a bug that could affect users with a culture setting other than eng-GB.
- When clicking 'Download as image', the status legend will now be included in the generated image.
 - This required a minor change to button layout.

Other

- **Setup:** Added additional fields to 'Constants'.
- **Program Setup:** The rich text editor component has been updated from v4 to v5.7.1.
- **Findings List:** Activity No. is now available in the grid, and can be clicked to navigate to the Activity.
- General bug-fixes and improvements.

2021.04

Special Notice

- Users with Read Only-access will no longer be able to view internal findings, i.e. findings created during the 'Follow-up'-step. This applies to the following forms:
 - Activities List (change log in detail panel)
 - Activities Plan (change log in detail panel)
 - Activity details (list of findings; detailed change-log)
 - Findings List.
- The 'Follow-up'-step will be hidden to users with Read Only-access.

Global Setup

- Tooltips: Added section for custom tooltips for the filter panel used in Activities List and Activities Plan.

Setup

- Added a tab for setting up Constants.
 - This replaces the 'Notification Coordinator' implemented in release 2021.01.
- Added an option to enable or disable using local (domain specific) email templates.

Activities List

- Text in 'Scope' (details panel) is displayed with formatting.
- Clicking a link to an activity will always open in a new tab, in stead of re-using browser tabs.
- The filter panel now supports tooltips.

Activities Plan

- Text in 'Scope' (details panel) is displayed with formatting.
- Double-clicking an activity will always open in a new tab, in stead of re-using browser tabs.
- Proper styling is now applied to the details panel, to correctly indicate that editing is not possible.
- The filter panel now supports tooltips.
- Fixed a bug where correct styling was not applied when clicking legend-buttons to apply corresponding Status-filter.

Activities

- The 'Follow-up'-step will be hidden to users with Read Only-access.
Information relating to internal findings will not be visible to Read only-users in the data logs.

Findings List

- The Findings-report can now be opened from a 'Reports'-button, similar to Activities List.
 - The report will be generated using the filter currently set in the Findings List.
- Internal Findings are hidden to Read only-users.

New: Copy Activities

- The new form 'Copy Activities' will allow users to copy activities from other domains that they have access to.

Other

- The ITP Register now supports attachments.
- Key Statistics: Clicking links will now open new browser tabs, in stead of re-using the same tab.
- General improvements and bugfixes.
- Notifications: Notifications are sent to activity responsible and finding responsible when these are changed in the finding/activity.

Global Setup

- Added option to define email templates for notifications.
- Added setup for planned date highlighting rules, i.e. red when planned date has passed a set limit, yellow when planned date is soon to pass a set limit, and green for when planned date is ahead of defined limits.
 - Highlighting rules are applied to Planned Date in the following forms:
 - Activities List (main grid and details panel)
 - Activities Plan (details panel)
 - Activities (main form)
- Added setup for global participant roles.

Setup

- Added option to define project specific versions of the global email templates for notifications.
- Added option to define project specific versions of the global participant roles.
- Added option to enable linking Risk Actions to QM Activities from the Activities form.

Activities

- Added support for using pre-defined email templates when sending Notification Letter and Report.
- Improved error handling for cases where the selected contract number has not been set up in DCS (when using Correspondence to send Notification Letter and Report)
- Added support for linking Activities and Risk Actions.
 - Access to Risk Management module is required.

ITP Register

- Added support for using pre-defined email templates when sending Notification Letter and Report.
- Generate QM Activities functionality updated.
- Fix to data-source error.

Other

- General improvement: Full names of users are now displayed in stead of login.
- General improvement: Alert boxes will now fade out automatically in stead of having to be closed manually.
- General bug fixes and improvements to database objects in preparation for first release candidate.

2021.02

Key Statistics

- Bug-fix: Clicking links would open the Activities Register with incorrect filter criteria, displaying a different number of Activities compared to the number displayed in Key Statistics.

- Note: Activities shared from other domains will not be included in the aggregations in Key Statistics.

Global Setup

- Custom text fields can now be configured with custom look-ups.

Setup

- Added option to use the Correspondence functionality in Pims DCS to send Notification Letter.
 - Activating this option will generate a Correspondence draft in stead of opening the dialog for sending the letter per email.
- Added a SortOrder-column to Disciplines, supporting customized sorting.

Activities

- Activities can now be deleted.
- Added support for custom lookups.
- 'Company' in Involved Personnel has been changed to 'Representing Company'.
- Support for generating a Correspondence for sending Notification Letter from the Notification-step and Quality Assurance report from the Reporting-step.

Activities Plan

- A selected Date Range can now be included in the filtering, in addition to setting a zoom-level. This removes clutter when saving the chart as image.
- Showing activities for all domains has been re-enabled.
- Fix: Filtering will now be correctly applied to milestones.

Other

- Activities List supports deletion of activities.
- 'Representing Companies' has been added to the filter panel of Activities List and Activities Plan.
- Planning Activities: Added support for importing planning activities from Excel.

2021.01

Setup

- Disciplines can now be added in global setup (called 'Global Disciplines') and only domain specific disciplines are added in Domain setup.
- Added support for configuring Time Zone, to support generating reports with non-UTC date and time.
- Added possibility to nominate a Notification coordinator.

Global Setup

- Added setup for global Disciplines.
- Added collection of customizable fields.
- Added option for enabling connection to CMS Planning Activities

Activities

- Support for formatting date and time in Agenda based on user's local settings.
- The Email history allows emails to be downloaded.
- Added support for customizable columns.
- Added support for connecting CMS Planning Activity.
- 'Scope' and 'Notification Comments' are included in downloaded iCal-file.
- Added 'Participated'-column to Involved Personnel.
- Checklist Items can now be linked to Agenda points.

ITP Register

- Initial release.
- Allows for creating ITP Activities for ITP Test Plans.
- QM Activities can be generated directly from the ITP Activities.

Other

- Activities Plan: Temporarily disabled the option to view activities across domains due to an incompatibility with the framework and the current implementation. Slated to return for next release.
- Filter panel (Activities List, Activities Plan): The node 'Team Members' has been renamed 'Involved Personnel' to reflect naming in the detail form.
- General bug-fixes and improvements.

2020.12

Setup

- Introduced a setting for enforcing Closure Comments on Findings. Input for Closure Comment only displayed when this feature is active.
- 'Personnel Roles' renamed 'Participant Roles'
- 'Import Setup' has been updated to include recently added setup features (e.g. 'Focus Areas', 'Sub-sub types', etc).

Global Setup

- 'Confidentiality Levels' have been replaced by 'Sensitivity Levels'. Reflected in Activities.
- Added option to activate ITP functionality.
- Added a section for Activity Statuses, including a setting for default status to be used for new Activities.

Activities List

- 'Add Activity'-button hidden for users with read-only permissions.
- New columns:
 - 'Number of Delays': Shows the number of times 'Planned Start Date' has been altered.
 - 'Days Passed Planning Date': Displays 'Days Left: xx' when 'Planned Start Date' is in the future, 'Days Overdue: yy' when the date has passed.

- Filter panel:
 - Changed the wording 'Overdue' with 'Days Passed Planning Date'.
 - Added 'Involved Companies' as filter option
 - Added 'Required participants' as filter option. Can be used for activities where there are Involved Personnel flagged as 'Participation Required' and 'Participation Confirmed' has not been set.

Activities

- 'Confidentiality Levels' have been replaced by 'Sensitivity Levels'.
- Checklist items can be linked to Agenda points.
- Option to share activity with other domain is not shown for users with read-only permissions.
- 'Agenda' is no longer required to complete the 'Notification'-step.
- Involved Personnel: When adding new persons, CompanyID will not be displayed if the current user does not have sufficient permissions to edit this column.
- Calendar invitations: The downloaded iCal-files now also include location, agenda, and involved personnel.
- Lookups showing names (e.g. Activity Responsible, Requested By, etc.) will now sort on Lastname, Firstname, and not on login.
- Findings: Tooltip on 'Close'-button changed from 'Discard changes and close window' to 'Discard unsaved changes and close window'. The previous tooltip could wrongly give the impression that any changes made would be dropped, while only *unsaved* changes are discarded.

Other

- Activities Plan: Added possibility to set start- and end-dates, which zooms the chart to the selected date range.
- Key Statistics: Added columns for 'Planned Date Has Passed' and 'Number of Delays'
- General bugfixes and improvements.

Cumulative changes up to and including 2020.11

The following items are a cumulative list of noteworthy changes made during the re-working of the Quality Management module. Further items will be added as part of a module review.

Setup

- **Type** and **Subtype** are now global settings.
- **Sub-subtypes** are set in individual projects. Sub-subtypes can be linked to a Subtype in the setup.
- **Findings classifications** can be edited in setup.
- Setup for **Activity Sharing** established.

Activities

- **Checklist Item** is available in the column chooser for Findings grid in Reporting and Notification steps.

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