

# TRIAL INTERACTIVE V10.7.1 - RELEASE NOTES V1.1



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## 1. Version History

Author	Revision #	Date	Comment
Samuel Pawar	0.1	30-May-2025	Initial Document Creation.
Samuel Pawar	1.0	13-Jun-2025	<p><b><u>Added Features:</u></b></p> <ul style="list-style-type: none"> <li>• QMS-44</li> <li>• TTI-4203</li> <li>• TTI-4242</li> <li>• TTI-4243</li> <li>• TTI-4244</li> <li>• TTI-4144</li> <li>• TTI-4266</li> <li>• TTI-4273</li> <li>• TTI-4274</li> <li>• TTI-4284</li> <li>• TTI-4283</li> <li>• TTI-4282</li> <li>• TTI-4281</li> <li>• TTI-4280</li> <li>• TTI-4279</li> <li>• Reports-191</li> </ul> <p><b><u>Removed Features:</u></b></p> <ul style="list-style-type: none"> <li>• TTI-4156</li> <li>• TTI-4240</li> <li>• TTI-4256</li> </ul> <p><b><u>Other Updates:</u></b></p> <ul style="list-style-type: none"> <li>• Defect Resolution table</li> <li>• Open Defects table</li> </ul>
Samuel Pawar	1.1	25-Sep-2025	<p><b><u>Removed Defect Resolution:</u></b></p> <ul style="list-style-type: none"> <li>• TRL-17334 - is being removed from the scope as the defect resolution was not merged into the final 10.7.1 Build Number applied to Production.</li> </ul> <p><b><u>Updated the Room Type:</u></b></p> <ul style="list-style-type: none"> <li>• TTI-4221 feature Offering Impacted to Collaborate.</li> </ul>

## 2. Purpose

The purpose of this document is for **TransPerfect** to disseminate information to end-users (internal and clients) prior to a system release and detail the new features and important changes. This is performed several weeks in advanced of the Upgrade Date by issuing Pre-Release Notes. The end-users of the system can use the Pre-Release Notes in evaluating if their intended use of the system will be impacted by the changes introduced in the system release. The Final Release Notes are then issued once the internal Validation Package has been reviewed/approved by Trial Interactive Quality Assurance. The Final Release Notes will contain the final list of items in scope of the Release.



**NOTE:** **TransPerfect** will make commercial best efforts to minimize the differences between the Pre-Release Notes and the Final Release Notes, but due to Trial Interactive's Agile Software Development methodology, cannot guarantee that there will be no changes in scope.

### 3. Scope

The scope of this document applies to the release of the following computerized system:

System In Scope	
System Name	Trial Interactive
System Version	v10.7.1
Release Type	Patch

## 4. Definitions / Acronyms

Term	Definition/Description
<b>21 CFR Part 11</b>	The part of the United States Code of Federal Regulations that regulates electronic records and electronic signatures.
<b>API</b>	Application Programming Interface
<b>Annex 11</b>	The European Union's guidance for using electronic records and signatures in the pharmaceutical industry.
<b>CRO</b>	Clinical Research Organization
<b>CSM</b>	Customer Success Manager
<b>CTMS</b>	Clinical Trial Management System
<b>DICOM</b>	Digital Imaging and Communications in Medicine
<b>ERES</b>	This document provides guidance in the United States for using electronic systems, records, and signatures in clinical investigations.
<b>GDPR</b>	The General Data Protection Regulation is a set of rules laid out by the European Union regarding data privacy rights.
<b>GxP</b>	An abbreviation generally accepted to refer to accepted standards of good practices.
<b>IDP</b>	Identity Provider
<b>JIRA</b>	A proprietary issue-tracking product, developed by Atlassian, used for bug tracking, issue tracking, and project management.
<b>KPI</b>	Key Performance Indicator
<b>LMS</b>	Learning Management System
<b>MDE</b>	Metadata Extraction
<b>MFA</b>	Multi-Factor Authentication
<b>OOTB</b>	Out of the Box
<b>QMS</b>	Quality Management System
<b>sFTP</b>	A secure File Transfer Protocol
<b>SLA</b>	Service Level Agreement
<b>SOP</b>	Standard Operating Procedure
<b>SQA</b>	Software Quality Assurance
<b>SQL</b>	Structured Query Language
<b>SSO</b>	Single Sign On
<b>SSU</b>	Study Start-Up
<b>TI</b>	Trial Interactive
<b>eTMF</b>	Electronic Trial Master File
<b>TP</b>	TransPerfect
<b>Testiny</b>	A web-based test management software that facilitates software quality assurance; it produces reports on a release candidate and documents the nature and category of bugs.

## 5. Release Overview

This patch release includes New Features, Enhancements, Reports, Open Defects and Defect Resolution. Please see the table below in the next section for the release schedule.

## 6. Release Schedule

Once approved for release on the date noted below, this version will be deployed to the Multi-tenant (MTI) environment during the normal maintenance windows:

Schedule (All time zones are in ET)	
<b>Date of Release</b>	13-Jun-2025
<b>Estimated US MTI Upgrade Date/Time:</b>	13/Jun/2025 9:00 PM
<b>Estimated EU MTI Upgrade Date/Time:</b>	13/Jun/2025 5:00 PM
<b>Estimated China MTI Upgrade Date/Time:</b>	20/Jun/2025 9:00 AM
<b>Date of Dedicated Client Upgrade:</b>	For information about upgrading your dedicated instance to this new version, please contact your <b>TransPerfect</b> Customer Success Manager.



## 7. Hardware and Software Requirements

The following describes the hardware and software requirements in order to use the Trial Interactive v10.7.1 platform.

System Requirements	
<b>Operating System</b>	<ul style="list-style-type: none"> <li>Windows Version 7 or higher</li> <li>All currently supported Mac OSX releases</li> <li>iOS and Android for my mobile app (see myTI release notes)</li> </ul>
<b>Browser</b>	<ul style="list-style-type: none"> <li>Microsoft Edge: Version 88 and later</li> <li>Google Chrome: Current release and earlier</li> <li>Mozilla Firefox: Current and ESR releases</li> <li>Apple Safari: Current release and earlier</li> <li>NOTE: TI Sign requires that pop-up blockers be disabled for the Trial Interactive domain.</li> </ul>
<b>Client Software</b>	<ul style="list-style-type: none"> <li>For full support when online editing, Microsoft Office 2016 or higher (Office 365 is preferred) is required when editing locally.</li> <li>For MS Word document generation, online editing is recommended, and all templates must be minimally created using Microsoft Office 2016 (Office 365 is preferred).</li> <li>Optional: Adobe Acrobat, Acrobat Standard, or Professional version 8 or higher may be installed in addition to the included PDF Viewer.</li> <li>Optional: Drag and Drop from Outlook to Trial Interactive is supported on Windows 10® for Chrome® and Edge® browsers. A plug-in is available to support this feature on Internet Explorer® and Firefox®.</li> </ul>
<b>Optional Add-Ons</b>	<ul style="list-style-type: none"> <li>DocuSign Standard and DocuSign 21 CFR Part 11 (Latest Cloud Versions)</li> <li>Adobe Sign (Latest Adobe Document Cloud Version)</li> <li>Optional: SAS Viewer or compatible software must be installed for SAS Datasets. The free version is available here: <a href="https://support.sas.com/downloads/browse.htm?fil=&amp;cat=74">https://support.sas.com/downloads/browse.htm?fil=&amp;cat=74</a></li> </ul>

## 8. Changes

### Legend for Impacts

Trial Interactive v10.7.1 has been released with these enhanced features and defect fixes. These tables use the following definitions of customer Impact:

- **Blocker:** A Blocker defect refers to a critical issue that completely prevents further progress in development or testing.
- **Critical:** A core functionality returns invalid results or does not function as expected.
- **Major:** This Defect has an impact on basic functionality.
- **Minor:** There may be a small impact on business in specific use cases.

### Legend for Offering/Room Types

- Electronic Trial Master File (eTMF)
- Study Start-Up (SSU)
- Collaborate (CMS)
- Quality Management System (QMS)
- Platform

## A. NEW/ENHANCED FEATURES

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
QMS-44	QMS	<p>This improvement introduces ‘Effectiveness Checks’ as a system-managed sub-record of the Action Item Record type, which is essential for verifying the success of CAPAs and Quality Events. Effectiveness Checks must be created and completed before a parent record can be closed.</p> <p><u>Key Features</u></p> <ul style="list-style-type: none"> <li>A new checkbox is added to the Record Type Settings for Action Items. When enabled, this setting designates the corresponding record type as an Effectiveness Check type.</li> <li>The ‘Create Effectiveness Check’ trigger is now available under the Statuses tab in workflow creation.</li> <li>The Effectiveness Check is created before the CAPA Plan or incident is approved, prefilled with relevant information, and executed before the closure of the CAPA or incident.</li> <li>Effectiveness check creation and triggers are logged in for Audit purposes.</li> </ul>	Yes	No	Major	<p><b>Affected Users:</b> Editor and Above</p> <p><b>Impact:</b> This improvement has a major impact on designating Action Item records as Effectiveness Checks.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
QMS-57	QMS	<p><b>Initially</b>, Record Types assigned to existing Incidents could be deleted without any warning, clearing the Incident Type field in those records. This improvement enhances data integrity and user awareness.</p> <p>Now, when attempting to delete a Record Type referenced in one or more Incidents, the system displays a warning message stating: <b>“The Record Type is referenced in such Incident(s).”</b></p>	Yes	No	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on deleting the record types.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4203	QMS	<p>Introduced is enhanced workflow flexibility with ad-hoc assignment of stage approvers and contributors, allowing Process Owners to select specific users or groups for each workflow stage at runtime. This supports teams that require more precise control over who can act on or view records, especially in smaller or sensitive environments.</p> <p>A new “<b>Enable Ad-Hoc Team Assignment</b>” setting in the Record Type Profile activates this feature. When enabled, a modal appears during the Assessment stage approval, letting the Process Owner assign users manually and choose whether access is limited to those selected or granted to the whole team. Users who are not selected to participate are not given access to the record, ensuring record security for sensitive quality issues. This update improves stage-level visibility, control, and accountability without disrupting existing workflows.</p>	Yes	No	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management workflow assignments.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4279	QMS	<p>TI has streamlined the way users configure Keyword Lookup fields by introducing a new bulk textarea input. Instead of entering each value individually, users can now paste multiple values at once—each on a separate line—making large-scale setups faster and more efficient. This update is especially helpful when working with long lists, supporting quick copy-paste directly from .txt, Excel, or CSV files.</p> <p>The system will now automatically convert each line into a valid lookup option, trimming any extra spaces and ignoring empty lines. Duplicate entries will be detected and either flagged or skipped to ensure clean data. This improvement brings the Keyword Lookup configuration in line with the bulk entry features already available in other modules, reducing manual effort and improving overall consistency across the platform.</p>	Yes	No	Minor	<p><b>Affected Users:</b> Admin and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management settings.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4244	QMS	<p>TI has enhanced the usability of Date/Time fields by removing the time picker and converting them to date-only fields. This update streamlines data entry, making it faster and more intuitive—especially for real-world scenarios like logging a “Date of Incident” where only the date is relevant.</p> <p>With this change, all Date/Time fields now display and store only the selected date. The time input has been fully removed from forms, views, the Quick View panel, and exports. By eliminating unnecessary time data, users can avoid confusion and enter information more accurately and efficiently. This improvement reflects common usage patterns in QMS records and helps ensure cleaner, more consistent data across the system.</p>	Yes	No	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management field entry and settings.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4243	QMS	<p>To better align with customer preferences and enhance clarity, we've updated the system terminology by allowing the update of major Record Types Incidents, CAPA, and Action items to suit customer preferences. This change ensures consistent language across the platform and improves the overall user experience without affecting existing functionality or record behavior.</p> <p>The term "Quality Events" may now be used and reflected across all relevant areas, including listing views, form settings, action buttons, and record type configurations. Other names such as "Complaints" or "Non-Conformances" may be used as desired. This terminology flexibility ensures a more intuitive and customer-aligned interface while preserving all underlying data and processes.</p>	Yes	No	Minor	<p><b>Affected Users:</b> Admin and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management record type names in settings.</p>



Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4242	QMS	<p>TI has introduced enhanced due date management to give authorized users—specifically Record Owners and Admins—the ability to override or extend the due date for any workflow stage, including during the Assessment phase. This provides greater flexibility in managing records while maintaining full transparency and control.</p> <p>To ensure accountability, users must provide a mandatory reason when extending a due date. This reason is logged in the record history and audit trail. Additionally, email notifications are automatically sent to the Originator, Record Owner, and current stage assignee, clearly detailing the updated due date, the reason for the extension, and who made the change. This enhancement supports more adaptive record management while preserving traceability and stakeholder awareness.</p>	Yes	No	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management Due Date settings.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4284	QMS	<p>To improve the user experience when creating records, TI has upgraded the Record Type field in both the Record Creation Modal and Metadata panel with two key enhancements: a searchable dropdown and a tree-based selector. These changes make it significantly easier to find and select the correct record type—especially in environments with large or nested type structures.</p> <p>Users can now type keywords directly into a search bar to quickly filter record types in real time. Additionally, a new tree-based navigation interface allows users to browse types and subtypes using an intuitive expandable/collapsible structure—mirroring the familiar experience from Document Type selection. These updates streamline record creation and ensure consistency across classification fields.</p>	Yes	No	Minor	<p><b>Affected Users:</b> Admin and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management Settings</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4281	QMS	<p>To improve clarity in the "By Workflow" view, we've made a targeted UI enhancement to ensure that records appear only in their current workflow stage. Previously, users could see the same record listed in multiple stages (e.g., both Assessment and Investigation), which led to confusion—even though this behavior was functionally accurate.</p> <p>With this update, once a record advances to a new workflow stage, it will no longer be displayed under its previous stage. This enhancement aligns the visual behavior with user expectations, making it easier to track a record's current status and reducing ambiguity when navigating the workflow view.</p>	No	Yes	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management Views.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4280	QMS	<p>As part of ongoing enhancements following the introduction of Ad-Hoc Assignments during Workflow (QMS-961), TI has updated the notification logic to prevent confusion and access issues. Previously, all workflow notifications (e.g., Claim, Swim Lane, Escalation) were sent to all Team Members, regardless of whether they had access to the record. This caused issues during Ad-Hoc assignments, where a user outside the team could be assigned, and team members would still receive notifications—despite lacking read access.</p> <p>With this update, workflow notifications are now targeted only to users who have actual access to the record, ensuring users are not notified about records they cannot view. This includes adjustments to both workflow-driven notifications (e.g., Swim Lane, Escalation) and system-triggered events (e.g., Record Closed, Cancelled, Workflow Resolved) when records are handled via Ad-Hoc assignments. This change ensures clearer communication and a more secure, permission-aware notification experience.</p>	No	Yes	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management notifications.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4282	QMS	<p>TI has significantly improved the team creation experience by introducing a streamlined, modal-based interface for assigning users and groups to authority roles (Process Owner, Contributor, Quality Approver). This enhancement replaces manual entry with an intuitive, searchable selection process—reducing setup time and improving accuracy, especially for large or cross-functional teams.</p> <p>For each authority type, users can now click a “Select” button to open a dedicated assignee selection modal. This modal includes two tabs - Users and Groups - each equipped with live search, filters, sorting options, and the ability to toggle between team-specific or room-wide lists (when editing existing teams). Selected assignees appear as tags under their respective roles in the team form, allowing for clear visibility and easy adjustments. These changes support scalable team configuration, promote consistent assignments, and enhance overall usability.</p>	No	Yes	Minor	<p><b>Affected Users:</b> Admin and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management Teams settings.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4283	QMS	<p>TI has enhanced the ID configuration settings for QMS record types, giving admins greater control over how record IDs are generated and organized. This new feature introduces an inheritance toggle at the record type level, allowing users to choose between using a shared parent-level ID format and sequence or defining a unique, standalone configuration.</p> <p>When inheritance is enabled (default), the record type adopts the ID format and numbering sequence from its parent, ensuring consistency across related records (e.g., <b>QE-AE-001</b>, <b>QE-AE-002</b>). When disabled, admins can define a custom starting number and unique ID format for that specific record type (or sub-record type), enabling isolated sequences (e.g., <b>QE-DEV-001</b>, <b>QE-AE-001</b>). The system includes built-in validation rules to prevent ID collisions and ensure unique formats across sibling types. An ID preview and real-time validation are also included to provide clarity during setup. This update supports both structured and flexible approaches to record management in large-scale QMS implementations.</p>	Yes	No	Minor	<p><b>Affected Users:</b> Admin and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Quality Management Record Type Settings.</p>

TTI-4144	eTMF	<p>To support more accurate and flexible contact synchronization between CTMS and TI eTMF, TI has updated the system’s handling of contact email addresses, removing the constraint that email must be the only unique identifier. This change resolves integration issues where multiple site contacts share a common site email, a common real-world scenario that previously caused sync failures and user confusion. The enhanced logic now uses the contact GUID as the primary identifier. Failing that, the Full Name + Email will be used, allowing for:</p> <ul style="list-style-type: none"> <li>• Shared email addresses across multiple contacts without conflict.</li> <li>• Email updates over time (e.g., sbrown@me.com to tbrown@me.com) without breaking contact linkage.</li> <li>• New local contacts will be created when email mismatches occur, using a dummy email if needed for system validation.</li> <li>• There will be flagging of contacts requiring manual intervention, especially when integration detects role mismatches (e.g., “Sub Investigator” vs. “Sub-I”) or obsolete entries.</li> <li>• Inactive/active processing for site personnel changes (e.g., new PI replacing an old PI).</li> <li>• As always, ensuring document provisioning for new PIs.</li> </ul>	No	Yes	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Contact synchronization between CTMS and eTMF.</p>
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Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
		These improvements will help ensure smoother CTMS–eTMF integrations, better reflect site realities, and reduce manual reconciliation work for admin users.				
TTI-4220	CMS	<p>TI has improved the Add Users to Acknowledgement modal for a more intuitive and context-aware experience. This enhancement introduces a dynamic header and site-based filtering to streamline the process of adding users from the Acknowledgement tab.</p> <p>The modal header now reflects the specific acknowledgement being edited, displaying as “Add Users to [Acknowledgement Name]” for clear context. Additionally, a new site filter has been added, with relevant sites preselected by default—matching those already included in the acknowledgement. These changes reduce manual filtering, improve clarity, and help users more efficiently manage acknowledgement participants across distributed site teams.</p>	No	Yes	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on Safety Acknowledgements, during site selection.</p>



Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4112	eTMF	<p>This feature enhances the <b>Documents for Billing</b> dashlet by adding support for displaying <b>Finalized</b> and <b>Rejected</b> documents, in addition to the existing <b>Submitted</b> documents. The updated dashlet now resembles the monthly document submission view, providing a more complete picture of document processing trends over time.</p> <p><b>Key Enhancements:</b></p> <ul style="list-style-type: none"> <li>Displays monthly counts for <b>Submitted</b>, <b>Finalized</b>, and <b>Rejected</b> documents.</li> <li>Shows exact numbers on hover over each bar.</li> <li>Enables users to <b>drill down</b> to a grid view showing all documents by status.</li> </ul> <p>This improvement enhances usability and allows billing teams and document managers to monitor document status distribution, and trends effectively.</p>	No	Yes	Minor	<p><b>Affected Users:</b> All Users.</p> <p><b>Impact:</b> This improvement has a minor impact on the Billing Report.</p>
TTI-4155	QMS	<p>This improvement introduces a tooltip for long team descriptions in the Teams grid. When hovering over a description, users will now see the full text in a tooltip for better readability and access to complete information.</p>	No	Yes	Minor	<p><b>Affected Users:</b> All Users.</p> <p><b>Impact:</b> This improvement has a minor impact on the Team's tooltip for description.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4174	QMS	This improvement introduces the capability to click on a Record ID and copy its direct link to the clipboard.	Yes	No	Minor	<b>Affected Users:</b> Editor and Above.  <b>Impact:</b> This improvement has a minor impact on the Record ID.
TTI-4221	Collaborate	This improvement updates the Compare and Show Comments features in Visit Reports to display all reviewer comments, regardless of the review type. This helps document owners when reports are rejected.	No	Yes	Minor	<b>Affected Users:</b> Editor and Above.  <b>Impact:</b> This improvement has a minor impact on both the compare and show comments features.

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4266	eTMF	<p>The latest Automate upgrade introduces significant improvements aimed at enhancing performance, transparency, and usability. With optimized execution speed and reduced latency, automation workflows now run more efficiently.</p> <p>A redesigned prompt testing interface makes it easier to validate logic during development, while detailed audit trails improve visibility and support compliance requirements.</p> <p>This release also adds the ability to handle prompt variables dynamically through real-time requests, expanding flexibility for advanced use cases. Document processing has been upgraded for better accuracy in extraction and classification, and new options for assessment generation allow broader application in business scenarios. Enhanced library selection tools and more granular user permissions further improve system control and user experience.</p>	No	Yes	Minor	<p><b>Affected Users:</b> All Users.</p> <p><b>Impact:</b> This improvement has an impact on upgrading the automation.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
TTI-4273	eTMF	<p>TI has addressed a validation issue encountered during Site creation when updating existing contacts. Previously, editors attempting to modify contact details (such as first name, last name, or address) while adding a site could encounter a blocking error, even when the changes were valid—specifically when only the address was updated.</p> <p>With this enhancement, the system now properly distinguishes between critical and non-critical contact updates. If a contact already exists and only the address is changed (while first and last names remain the same), the editor will now see a non-blocking warning instead of an error. This allows the Site creation process to continue smoothly, while still alerting the user to the update. This change improves workflow flexibility and reduces unnecessary interruptions during data entry.</p>	No	Yes	Minor	<p><b>Affected Users:</b> Editor and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on the contact detail validation.</p>
TTI-4274	SSU	<p>With this improvement, the “Do not allow addition of new documents to a Site after activation” checkbox is used for Active Sites, IRB and Country, so this information is now added in the title and the pop-up text in Study Start Up Settings.</p>	No	Yes	Minor	<p><b>Affected Users:</b> Admin and Above.</p> <p><b>Impact:</b> This improvement has a minor impact on the “Do not allow addition of new documents to a Site after activation” checkbox for IRB and Country.</p>

Feature ID	Offering Impacted	Description	Config Change?	Enabled by Default?	Impact	Comment / Impact Analysis
Report-191	eTMF	<p>Previously, the 'Query Issue' field in the 'Queries Report' appeared blank when a query was reassigned.</p> <p>With this release, the 'Queries Report' correctly populates the 'Query Issue' field when a query is reassigned to another user.</p>	No	Yes	Minor	<p><b>Affected Users:</b> All Users.</p> <p><b>Impact:</b> This improvement has a minor impact on the 'Queries Report' in the Reports module.</p>

## B. DEFECT RESOLUTIONS

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
QMS-448	QMS	In the Record Types Management module, when a user attempts to delete a Record Type that is currently assigned to existing Incident or CAPA records, the system deletes the Record Type without displaying any warning or confirmation message.	Minor	This bug had a minor impact on the Record Types Deletion. The resolution ensures that a warning is displayed before confirming the record type deletion.
QMS-816	QMS	In the Form Settings for the Action Item form, when a user selects the Title field, the system allows exclusion of the field from Coding. However, the 'Title' field is a mandatory core field and should not be allowed to be excluded from coding.	Minor	This bug had a minor impact on the Action Item Title field. The resolution ensures that the 'Coding' checkbox should be non-editable for the 'Title' field, thereby making it mandatory by default.
QMS-830	QMS	An issue was identified in the Record Types Management module where entering a format value that exactly matches the example hint (e.g., INC-{{###}}) in the Sequential Numbering > Format field causes the value to be cleared upon saving. The field becomes empty, highlighted in red, and the format is not accepted.	Minor	This bug had a minor impact on the configuration in Record Type Management for Incident format field. Correct System Behavior has been restored.
QMS-831	QMS	For rooms created from a template or without QMS, the Team field in Processing Configuration shows '0' instead of being empty.	Minor	This bug had a minor impact on the Team field. Correct system behavior has been restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-16878	Collaborate	<p>An issue persisted where the Signers metadata field incorrectly displayed the status as 'Declined' instead of 'Cancelled' when an eSignature request is cancelled.</p> <p>Additionally, if the first signer opened the document but did not complete the signature, the system prematurely sent an email notification to the second signer. When the second signer clicked the link in the email, they were directed to the document, but the Sign Document button was not visible in the metadata panel.</p>	Major	This bug had a major impact on the TI Digital eSignature process. The resolution resets the correct system behavior.
TRL-17609	eTMF	An issue was identified where editors in eTMF were able to replace an attachment when there was an SSU-enabled room.	Critical	This bug has a critical impact on the editor's capability to replace attachments on final filed documents. Correct system behavior will be restored.
TRL-17732	Platform	When sending a document for Reading and acknowledgement, users are unable to select all intended sites across search results. Specifically, when sites were selected on the first page and the user navigates to the next page, the selections made on the first page were automatically cleared.	Minor	This bug had a minor impact on the site selection for the Read and Acknowledge process. The resolution ensures that users can select all sites in one action or have selections persist across pages.
TRL-17842	Collaborate	The dropdown on the Audit Trail page did not display the E-Signature Activity action when a document was signed via the Change Control Workflow.	Major	This bug has a major impact on the display of E-Signature activities on the Audit Trail page. The resolution ensures that the E-Signature activities are displayed in the dropdown.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-17914	Platform	When attempting to filter the Audit Trail by selecting a specific user and clicking Apply, the system incorrectly includes records associated with other users in the results.	Minor	This bug has a minor impact on displaying Audit Trail results for specific users. Correct system behavior will be restored.
TRL-17931	eTMF	When submitting a translation request for a document, the values entered for the required fields 'Project Start Date' and 'Country' are not displayed in the metadata panel. Additionally, the updated values were not displayed in the metadata panel after users updated these fields before the request submission.	Minor	This bug had a minor impact on data display in the metadata panel of a translation request. The resolution ensures that the field values are accurately displayed in the metadata panel.
TRL-18061	eTMF	The Audit Trail results were not displayed when users selected 'Placeholders' from the dropdown, or even by applying filters or specifying different criteria.	Major	This bug had a major impact on the display of audit trail results for 'Placeholders'. The resolution ensures that the audit trail results are correctly displayed for 'Placeholders', including when filters or specific criteria are applied.
TRL-18086	eTMF	The 'Activity Description' field in the Audit Trail export file from the User Management module appeared blank for metadata update actions, even though the corresponding values were correctly displayed on the Audit Trail page within the module.	Minor	This bug had a minor impact on the Audit Trail functionality in User Management. The resolution ensures that the 'Activity Description' is now accurately captured and included in the export file, aligning it with the information shown in the user interface.
TRL-18110	Collaborate	Users encountered a server error when attempting to access the version history of specific documents.	Major	This bug had a major impact on viewing the document version history. The resolution ensures that users can access the version history of documents without any errors.



Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18117	Platform	Users experienced a system error when attempting to access document types within the Document Types Management section of the Settings module.	Minor	This bug had a minor impact on document type accessibility. The resolution ensures that users can access document types in the Document Types Management section without encountering any errors.
TRL-18122	Collaborate	When a user generates a Follow-up Letter and selects the 'Edit with New Version' option, attempting to save the document as a Major Version result in a system error.	Major	This bug had a major impact on editing follow-up letters. The resolution ensures that the Follow-up Letter is saved successfully as a Major Version without any errors.
TRL-18123	Platform	When users attempted to change the language from the username dropdown, an error message appeared, and the screen failed to load the updated user interface.	Critical	This bug had a critical impact on the language change functionality. The resolution ensures that the UI is now properly updated based on the language selected from the username dropdown.
TRL-18124	eTMF	Users noted that the PDF cleanup is not working. When PDF cleanup is enabled in Room Settings and a PDF document is uploaded with "Restrict Document Content" selected in metadata, the system does not create a PDF cleanup folder, and the document is not submitted for processing.	Critical	This bug has an impact on the PDF clean-up functionality. Corrected behavior has been restored.
TRL-18125	Platform	When performing a document search using the 'Room Level Search' function, a pop-up error message appeared stating: 'Server error (The cause is in the logfile)'. Despite this error, the search results were still retrieved successfully.	Major	This bug had a major impact on the room-level search functionality. The resolution ensures that search results are displayed without any errors.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18130	Platform	User noted that when a document is sent for serial signature (MSB), the eSign status shows as “Unknown”.	Major	This bug had a major impact on the e-Signature functionality. Corrected behavior has been restored.
TRL-18138	Platform	In the TI Audit Room, trying to re-enable a user whose access was revoked results in a "server error" when changing their role to "Reader." This issue occurs in MTI EU, US, and Stage environments.	Blocker	This bug had an impact when re-enabling a revoked user in the TI Audit Room. Corrected behavior has been restored.
TRL-18140	Platform	Users encountered an error message stating that the group doesn't exist while adding users to eTMF teams in cloned TI rooms.	Major	This bug had a major impact on adding users to eTMF teams in cloned TI rooms. The resolution ensures that users can be added to eTMF teams in cloned rooms.
TRL-18141	Platform	Super Admin users encountered an error when attempting to update actions for both themselves and other Super Admin users in the User Management module.	Major	This bug had a major impact on Super Admins' ability to update actions. The resolution ensures that Super Admins can update both their actions and those of other Super Admin users without any errors.
TRL-18142	Platform	End users encountered an issue where the version sequence of a document was incorrect. Document versions are not appearing in the expected sequential order in the 'Versions' tab of the metadata panel.	Major	This bug had a major impact on the document versions sequence. The resolution ensures that document versions are displayed in the correct sequence.
TRL-18144	Platform	Users were unable to respond to queries because the Respond button was not visible. Additionally, users are unable to respond to their queries.	Minor	This bug had a minor impact on responding to queries. The resolution ensures that users can access the Respond button in the 'Queries' tab and respond to the queries.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18148	Collaborate	An issue was observed where changes made to a document using the Team Edit functionality were not being saved. Despite editing actions being performed, the updates were not retained.	Major	This bug had a major impact on the Team Edit functionality. The resolution ensures that the edits made to a document by different users are stored.
TRL-18149	eTMF	Users reported an issue with the Keyword Lookup Type in Form Settings. When attempting to view the keyword lookup values, a warning pop-up appears stating:  'KeywordSet does not exist for the given name.'	Minor	This bug had a minor impact on viewing the keyword lookup values in the Form Settings. The resolution resets the correct system behavior.
TRL-18152	Collaborate	When attempting to create a Read and Acknowledge, users were unable to select all sites using the 'Select All' button. The button only selected the eligible sites displayed on the current page, rather than across all available pages.	Blocker	This bug had an impact on selecting sites for a Read and Acknowledge notification. The resolution ensures that clicking on the 'Select All' button selects eligible sites across all pages.
TRL-18156	Platform	The eTMF API did not support the 'DocTypeID' as a parameter in the API endpoint 'AddDocumentForSite' to upload a document to the eTMF. The system supported 'DocumentTypeUniversalId', but using the aforementioned values did not work and displayed an error.	Minor	This bug had a minor impact on the eTMF API supporting the use of 'DocTypeID'. The resolution ensures that the eTMF API supports the use of 'DocTypeID' as a parameter in the API endpoint.
TRL-18164	eTMF	When creating a query for a document submitter, any content copied and pasted into the query text field was incorrectly pasted twice automatically.	Minor	This bug had a minor impact on creating general queries. The resolution ensures that any content copied and pasted is pasted only once.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18165	Collaborate	An issue was identified in the 'Send for Read & Acknowledgement' window, where sites selected on the first page of the 'Select Sites' screen within the 'R&A Info' section were automatically deselected upon navigating to the next page.	Blocker	This bug prevented users from selecting multiple sites across different pages, blocking the selection process. The resolution ensures that site selections made on first remain intact even when navigating to other pages.
TRL-18166	Platform	Users encountered a server error message when editing details for an existing user in the User Management module.	Major	This bug had a major impact on editing details for an existing user. The resolution ensures that user details can be edited without any errors.
TRL-18179	Platform	An issue was identified where manually triggering the 'Regenerate Document Names' action from Room Settings updated not only affected documents but also other documents that previously displayed the correct generated names, unintentionally modifying them.	Minor	This bug had a minor impact on the Auto Name Rules in the Room Settings. The resolution ensures that names are accurately generated as per the rules for the documents.
TRL-18189	Collaborate	When attempting to create a Read and Acknowledge, several sites are displayed with no assigned users for R&A, indicating that some sites are not pulling the contact information.	Major	This bug had a major impact on pulling contacts for the site under R&A. The resolution ensures that the contacts are successfully retrieved while creating Read & Acknowledgement.
TRL-18190	eTMF	Users encountered a server error while attempting to copy documents to sites.	Minor	This bug had a minor impact on copying documents to sites. The resolution ensures that users can copy documents to sites without any error.
TRL-18192	Platform	The Search by Document Content Only option does not return any results, even when documents contain the searched keywords. However, these documents are indexed, as they can be found using the Document ID.	Critical	This bug had an impact on the document search functionality. Correct system behavior has been restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18200	Platform	<p>A request was received to update the Due Date of records in the database for the Acknowledgement Report. The issue stems from a timezone change for a specific Room, which was recently updated to MST. Originally, the acknowledgements were sent based on the previous timezone, causing the system to calculate a due date that was one day earlier than intended.</p> <p>The user has requested to add +1 day to the due date in the database to correct this discrepancy. For example, if the current due date is 28<sup>th</sup> March, it should be updated to 29<sup>th</sup> March.</p>	Critical	This bug had a critical impact on the due date of records in the DB for the Acknowledgement Report.
TRL-18202	Platform	When exporting document types along with the Responsible Party and Responsible Party Type, the 'Responsible Party' column in the export file appears blank, and the 'Responsible Party Type' is shown as 'Not Applicable,' despite the correct values being displayed in the metadata within the UI.	Major	This bug had a major impact on the display of correct details in the export file. The resolution ensures that all details are exported and align with the details on the UI.
TRL-18208	eTMF	Users are encountering a "database error" when attempting to apply an advanced filter in the "View by Status" workflow. The error occurs immediately upon filter application, preventing users from refining or accessing specific results based on status.	Major	This bug has a major impact on filtering functionality in the View by Status workflow, limiting users' ability to retrieve targeted data. Correct system behavior has been restored.
TRL-18235	eTMF	After the MTI Upgrade, the Contact module is displaying a different grid layout than what was previously configured. The client had set up a specific layout for the contact form, which was functioning as expected before the upgrade. Post-upgrade, the layout has changed unexpectedly.	Major	This bug has a major impact on the Contact module configuration, as the user-defined layout was not retained after the MTI Upgrade. Correct system behavior has been restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18242	eTMF	When adding a single document using the 'Add Document' option, the 'Date Type' field remains blank in the Document Metadata panel, even after selecting the appropriate Category and Document Type.	Major	This bug has a major impact on the 'Date Type' field while adding a single document using the 'Add Document' option. Correct system behavior has been restored.
TRL-18246	eTMF	In the MTI US environment, when users attempt to download a non-PDF document as a PDF from the TI Viewer, the downloaded file is assigned a random series of characters as the filename instead of using the original or a similar filename.	Minor	This issue has a minor impact on user experience, as the unintuitive file naming can create confusion when managing or identifying downloaded documents. Correct system behavior has been restored.
TRL-18213	Collaborate	An issue was identified in the 'Send For Read & Acknowledgement' window, where using the 'Select All On All Pages' option did not function as expected. After selecting this option and navigating to the next page, the sites on the subsequent page appeared unselected.	Minor	This bug had a minor impact on the selection of sites for Read & Acknowledge. The resolution ensures that selecting the 'Select All On All Pages' option selects all sites across all pages.
TRL-18273	eTMF	Users encountered an issue with the 'Effective Closure Date' field in Site.  When users changed the site status from Active to Closed, the system allowed them to select a custom closure date. However, upon clicking Save, the system automatically set the Effective Closure Date to the current date.	Major	This bug had a major impact on recording the 'Effective Closure Date' in the site. The resolution ensures the system saves the selected date rather than overriding it with the current date.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18275	eTMF	The Event Listing Report did not display accurate values in the “Progress” column. The data shown did not accurately reflect the actual progress status of the events, resulting in inconsistencies between the report and the event records.	Major	This bug had a major impact on the Events page. The resolution ensures that the ‘Progress’ column in the Event Listing Report now correctly reflects the current progress status of each event based on the underlying data.
TRL-18276	eTMF	An issue was observed in the document versioning display. The document correctly showed version 2.0 in the grid view, but the Version tab continued to display version 1.0, causing confusion regarding the current version of the document.	Major	This bug had a major impact on the Documents Library page. The resolution ensures that the Version tab now correctly reflects the updated version, ensuring consistency across all views.
TRL-18280	Platform	The ‘Parent Document’ field on the ‘Import Documents’ modal window only accepted numeric input and did not allow text entry when importing a new document.	Minor	This bug had a minor impact on adding details within the fields of the ‘Import Documents’ modal window. The resolution ensures that the ‘Parent Document’ field accepts numeric and text inputs.
TRL-18285	QMS	Users received an excessive number of notifications when a CAPA was claimed for workflow in the QMS room. Each claim action triggered multiple redundant notifications, leading to unnecessary alerts and potential confusion.	Major	This bug had a major impact on the notification system within the QMS room. The resolution ensures that only the relevant and necessary notification is triggered when a CAPA is claimed, reducing noise and improving user experience.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18330	eTMF	A user reported that the metadata panel is not visible when attempting to import a document from the eTMF Home view. As a result, no metadata is applied during the import, and the system displays the message: "Import without Metadata."	Minor	This bug had a minor impact on the document import process from the eTMF Home view. The resolution ensures that the metadata panel is now properly displayed, allowing users to apply metadata during document import as expected.
TRL-18331	Platform	Users are unable to export documents from the Search results. After performing a document search and selecting a document for export, the system displays a "Task Cancelled" message, and the document is not downloaded.	Major	This bug had a major impact on exporting documents via the Search functionality. The resolution ensures that selected documents can now be successfully downloaded from the search results without errors.
TRL-18340	eTMF	An issue was reported where the auditor's comment was repeatedly displayed in the Document Resolution comment section for Audit Failed Documents. The issue was reproducible in the test environment and led to confusion during the resolution process.	Critical	This bug had an impact on the Audit Documents. The resolution ensures that the Document Resolution comment field now correctly remains blank.
TRL-18366	Collaborate	An issue was observed with the "Version" tab in the metadata panel for two specific documents. When attempting to view the versions of one document, a warning popup appears with the message: "Server error – The cause is in the log file." For the second document, the message displayed is: "Document version not found." In both cases, version history is not accessible.	Major	This bug had a major impact on accessing document version history in the metadata panel. The resolution ensures that the <b>Version</b> tab now displays version information correctly and no error messages are triggered when accessing document versions.



Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18397	Platform	While creating a Custom Workflow, selecting Metadata criteria as Document Type does not persist. After progressing through the workflow setup steps, the selected Document Type value is reset, requiring users to reselect the criteria or preventing the intended condition from being applied.	Critical	This bug had a critical impact on configuring metadata-based custom workflows. The resolution ensures that the selected Document Type criteria is now retained throughout the workflow creation process.
TRL-18410	Collaborate	When users upload a PDF document with placeholder fields enabled, attempting to check out the document results in a server error. This issue does not occur with Word documents, checkout works correctly when placeholders are enabled for Word files.	Critical	This bug has an impact on PDF document handling. Correct system behavior has been restored.

## 9. Open Defects

Trial Interactive v10.7.1 has been released with these known issues. This table uses the following definitions of severity:

- **Blocker:** A Blocker defect refers to a critical issue that completely prevents further progress in development or testing.
- **Critical:** A core functionality returns invalid results or does not function as expected.
- **Major:** This Defect has an impact on basic functionality.
- **Minor:** There may be a small impact on business in specific use cases.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
QMS-674	QMS	Users noted that the Due Date filter in Room > Quality > Filters does not display the Room Time zone, causing potential confusion.	Minor	This bug has a minor impact on the Due Date when adding it. Correct system behavior will be restored.
QMS-675	QMS	Users noted that in the Room Search > Quality Records, the Due Date field in Advanced Search does not display the Room Timezone.	Minor	This bug has a minor impact on the due date in the room search. Correct system behavior will be restored.
TRL-9793	Platform	The user noted that the Grid view becomes misaligned when scrolling through a large number of records.	Minor	This bug causes the grid columns to go out of alignment during scrolling, affecting readability. Correct system behavior will be restored.
TRL-11642	Platform	An issue has been identified where document search displays results when the full document name is entered. However, no results are returned when searching using the partial text of the submitted name.	Minor	This bug has a minor impact on searching documents with partial text. Correct system behavior will be restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-12195	Platform	Users noted an issue with a specific room in the MTI US instance, where Regulatory Packet emails sent from the room to the Main Contact are not using the correct email domain configured at the room level. Instead, the system is incorrectly pulling the email domain from the cross-study level, leading to misaligned sender information.	Minor	This issue has a minor impact on the email functionality while sending the Regulatory Packet. Correct system behavior has been restored.
TRL-13555	Platform	User noted an issue MTI US instance reporting an issue during document coding. When the user selects Category: Site and then Investigative Site, the Site field becomes grayed out, and the site details disappear upon choosing the document type. However, once the document is approved, the Investigative Site details reappear. Additionally, the user encounters a "Network Error"	Minor	This issue has a minor impact on the visibility of Site details. Correct system behavior will be restored.
TRL-14887	SSU	In the SSU module, advanced validation fails to function when the IRB/EC Submit Date or Approval Date fields are used as part of the validation criteria.	Minor	This issue has a minor impact on advanced validation functionality. Correct system behavior will be restored.
TRL-15324	eTMF	Editor-level users in the "General Query Responder" group are unable to assign queries, as the "Add Assignee" option is greyed out in the General Query module.	Minor	This bug has a minor impact on assigning the queries for editor-level users. Correct system behavior will be restored.
TRL-15397	Platform	The user has noted that the signature in a Document is viewable in the Original viewer but not in the TI Document viewer.	Minor	This bug has a minor impact on viewing the document in the TI document viewer. Correct system behavior will be restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-15435	eTMF	Users are experiencing an issue where documents added to the Related Documents tab do not appear after being added. Although the system displays a success message, the tab remains empty and does not show the added document.	Minor	This issue has a minor impact on adding the document to the related documents tab. Correct system behavior will be restored.
TRL-16300	Platform	Users reported that font changes made while editing a document offline are not retained upon check-in. When a user checks out a document, updates the font style offline, and checks it back in as a minor version, the changes are not saved—the font reverts to its previous state.	Minor	This bug has a minor impact on formatting consistency, as offline font changes are not preserved during check-in. Correct system behavior will be restored.
TRL-16345	Platform	In the Setting – client management user noted that not all controls are displayed on the organization tab when editing.	Minor	This issue has a minor impact on the organization's control visibility. Correct system behavior will be restored.
TRL-16899	Collaborate	The user noticed an issue in MTI US that the alignment for Rows and Columns in the grid view is jumbled if we oversize the header row.	Minor	This issue has a minor impact on the Alignment in the grid view for rows and Columns. Correct system behavior will be restored.
TRL-17187	Platforms	In the MTI US instance, there is an issue where the text color in the footer cannot be changed to black when editing fillable fields using the Content Control settings. Even after updating the color to black and saving the changes, the footer text remains grey.	Minor	This issue has a minor impact on the Content Control Setting. Correct system behavior will be restored.
TRL-17467	Platform	We are facing an issue in the MTI instance where a specific document in a reported room cannot be opened in either TI or Original View. Additionally, when exporting the checksum file via SFTP, the document details are missing.	Minor	This issue has a minor impact on accessing the document in TI and the Original Viewer. Correct system behavior will be restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-17469	eTMF	The user reported an issue where a document is not opening correctly in the TI Viewer. Replicated the issue in a test room, and the behavior remained the same. However, after enabling OnlyOffice-supported file extensions for .pdf, the document opened and displayed correctly.	Minor	This issue has a minor impact on accessing the document in TI Viewer. Correct system behavior will be restored.
TRL-17477	Collaborate	An issue was observed while sending documents for signature in the CCR Rooms. When selecting CRA as the document Author and CSM as the document Reviewer, the system automatically removes one of the signers.	Minor	This bug has a minor impact on sending documents for signature in the CCR rooms, with a workaround. Correct system behavior will be restored.
TRL-17545	eTMF	In the ETMF Completeness View, the Sub-I contact's first name is displayed incorrectly on the placeholder in the room.	Minor	This issue has a minor impact on the eTMF completeness view. Correct system behavior will be restored.
TRL-17879	Platform	When an Organization is created in Room Settings, a folder is auto-generated. However, Editors and Readers do not have access to this folder by default. Manual updates to folder security are required to allow access.	Minor	This bug has a minor impact on folder access management, with a workaround of manually changing the folder access. The fix should ensure that auto-generated Organization folders inherit default permissions, allowing Editors and Readers to view them without manual configuration. Correct system behavior will be restored.
TRL-17908	eTMF	The user has reported an issue in the MTI US instance where users with revoked access can still be assigned to queries under the Quality Review module.	Minor	This issue has a minor impact on the access revoked user, which can be added to queries. Correct system behavior will be restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-17922	Collaborate	An issue was identified in the application's user interface where dark mode was not applied consistently, with some sections still showing white backgrounds despite dark mode being enabled.	Minor	This bug has a minor impact on the application's UI. Correct system behavior will be restored.
TRL-17959	eTMF	Some documents are incorrectly displaying a page count of 0, despite actually containing multiple pages. This issue has been observed in the "View by Processing > Page Count > Processed" folder as well, where affected documents are listed with a zero-page count even though they have content.	Minor	This bug has a minor impact on document tracking and visibility, as inaccurate page count display may affect document assessment and processing workflows. Correct system behavior will be restored.
TRL-18000	eTMF	An issue was observed where the 'Certified Copy Reason' field was not visible even if the reason was specified in the room settings and the 'Yes' radio button was selected in the 'Is it a true copy certified document?' section while uploading a new document.	Minor	This bug had a minor impact on the display of 'Certified Copy Reason' while uploading a new document. Correct system behavior will be restored.
TRL-18047	Collaborate	<p>In MTI US, users have reported an issue where, upon adding both Editor- and Admin-level users to the Quality Editor group, only Editor-level users appear as selectable options when assigning an additional document owner in the metadata. Admin users are not displayed in the selection list.</p> <p>Additionally, periodic review notifications are being correctly sent to the document owner and all Editor-level users within the Quality Editor group. However, Admin users within the same group are not receiving these notifications.</p>	Minor	This issue has a minor impact on the Quality Editor group when adding both editors and admins. Correct system behavior will be restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18048	Platform	When adding a newly created room to a <b>Study Profile</b> in TI, the room is added but an error message appears during the process. This happens after selecting the room in the <b>Add Room</b> popup and clicking <b>Add</b> .	Minor	This bug has a major impact on the room-to-study linking process. The fix should ensure that rooms can be added to Study Profiles without triggering any error messages. Correct system behavior will be restored.
TRL-18077	eTMF	A user with Editor access reported being unable to view the CRA Reconciliation Module Reports. The issue was verified using a Super Admin account, where the reports were visible. The user's access was reviewed, confirming that they had Editor permissions with actions like Page Manipulation, Communication, Event Manager, and CRA Reconciliation enabled. The issue appears to be user-specific.	Minor	This issue has a minor impact on the ability of specific users to access CRA Reconciliation Module Reports. Correct system behavior will be restored.
TRL-18146	eTMF	Users noted the issue in MTI EU, where they are unable to view the specific documents in both the Original and TI viewers. The user attempts to open the document in the reported room but gets an error message. Additionally, the user attempted to upload the same document in the test room, but the persists there as well. But able to view this document locally.	Minor	This issue has a minor impact on accessing a specific document in both the Original and TI viewers. Correct system behavior will be restored.
TRL-18197	Platform	In MTI (US and EU) environments, when a user opens a document, sets the Document View to "Original", and clicks "Save & Next", the view automatically switches to "TI Document Viewer". This occurs consistently across both instances.	Minor	This issue has a minor impact on user experience, as the selected Document View is not retained during navigation, requiring users to manually reset it. Correct system behavior will be restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18203	SSU	<p>In MTI US, the Document Cart in the SSU module does not function as expected. The cart fails to open in a pop-up window, cannot be closed while staying on the current page, added documents are not visible, and drag-and-drop functionality is not working.</p> <p>In the previous version, the documents were visible in the cart, but the cart still cannot be closed, and drag-and-drop remains non-functional.</p> <p>The cart works correctly in eTMF, where it opens in a pop-up, can be closed properly, documents are visible, and the drag-and-drop functions as intended.</p>	Minor	This issue has a minor impact on user workflows in the SSU module. Users are unable to view, manage, or interact with documents in the cart effectively, disrupting document handling and increasing task time. Correct system behavior will be restored.
TRL-18281	eTMF	<p>Users facing an issue in MTI US where clicking “Copy Field” does not immediately make the metadata fields selectable. They only become selectable if we manually click on a field or switch to another document and come back.</p> <p>Similarly, clicking “Cancel Copy Field” does not immediately remove the copy icons from the metadata fields. The icons only disappear after refreshing the view or manually interacting with the fields.</p>	Minor	This bug has a minor impact on the Copy Field and Cancel Copy Field functionality. Correct system behavior will be restored.
TRL-18329	Platform	Users are unable to submit the documents into the room via email (Inbox Submission), despite having active access. When attempting to send a document to the study inbox, the user is getting the failure message that “You are not authorized to submit the documents for this study”.	Minor	This bug has a minor impact when users are submitting the documents via email (Inbox Submission). Correct system behavior will be restored.



Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18341	Platform	A discrepancy has been identified in MTI US during the room cloning process. When cloning rooms from the Master Template, certain folders in the cloned room are incorrectly assigned Custom Security, instead of inheriting security from their parent folders. This leads to a deviation in the expected folder security structure and poses risks to data integrity and compliance.	Minor	This bug has a minor impact on the security inheritance behavior in cloned rooms, but has a workaround. Correct system behavior will be restored.
TRL-18346	eTMF	An issue occurs where the user has the original document, which is already signed. When trying to upload the same document, the user is unable to see the signature at the bottom of the document.	Minor	This bug has a minor impact on eSignature that is not visible after uploading the document. Correct system behavior will be restored.
TRL-18350	Collaborate	Users are encountering an issue with MTI US in a specific room. While the left panel correctly displays the site breadcrumb as 'Vendors', the breadcrumb trail at the top of the interface continues to display 'Sites', resulting in an inconsistency.	Minor	This bug has a minor impact on the Breadcrumb trail that does not match renamed toolbar items. Correct system behavior will be restored.
TRL-18365	Platform	A user is missing from the Contact list in SSU after site activation. Attempts to add the user manually or via linking from CTMS using the TI Client Contact ID fail. When entering the user's email, it is automatically overwritten with a different email, and the system reports that the contact already exists.	Minor	This bug has a major impact on contact management, preventing accurate contact assignment at the site level. Correct system behavior will be restored.
TRL-18378	Platform	In MTI US and EU, when the user attempts to change the planned date of an event, it displays the extra white space in the Planned Date dropdown menu.	Minor	This bug has a minor impact on the Event Planned Date dropdown. Correct system behavior will be restored.
TRL-18396	Platform	The user noted that attachments added to query responses in the room are not viewable. When a user attempts to open the attachment, it loads as a blank screen, and no content is displayed.	Minor	This bug has a minor impact on query handling, as users are unable to view attachments linked to query responses. Correct system behavior will be restored.

Ticket(s) ID	Offering Impacted	Description	Impact	Comment / Impact Analysis
TRL-18406	eTMF	<p>A user reported two related issues in the Contacts module:</p> <ol style="list-style-type: none"> <li>1. There is a mismatch in the query count shown in different areas of the system.</li> <li>2. In the <b>Contacts</b> tab, several fields in the <b>Manage</b> column (such as <i>Contact Type</i>, <i>Full Name of Site Contact</i>, and <i>Active Contact</i>) are missing. These fields were previously visible.</li> </ol>	Minor	This bug has a minor impact on the usability of the Contacts module. Correct system behavior will be restored.

## 10. Customer Support

### A. REPORTING ISSUES WITH THE RELEASE

Once **TransPerfect Trial Interactive** releases a system into a Production environment, the Support Service department is responsible for providing Client and Authorized Users with technical support via phone or email. This support shall consist of commercial best efforts by **TransPerfect** to provide the User or the Client's designated personnel or helpdesk, with but not limited to the following:

- Error corrections and temporary workarounds
- Technical assistance relating to the operation of the system
- Processing service requests
- Processing configuration change requests

**TransPerfect** will respond in accordance with the levels of priority, as reasonably determined by **TransPerfect**. Support Services will be available at all times via phone and email from **TransPerfect** Service Desk centers set forth below:



#### Phone



#### Email



#### Business Hours

US: 888-391-5111 (TOLL-FREE)	<a href="mailto:help@trialinteractive.com">help@trialinteractive.com</a>	Available twenty-four (24) hours a day, seven (7) days a week, three-hundred-sixty-five (365) days a year
European Union, Madrid, Spain +44 (20) 45182755	<a href="mailto:eu.help@trialinteractive.com">eu.help@trialinteractive.com</a>	Monday – Friday, 9 AM – 6 PM CET.
China +86 (755) 66856062	<a href="mailto:cn.help@trialinteractive.com">cn.help@trialinteractive.com</a>	Monday – Friday, 9 AM – 6 PM Beijing Time

## B. REQUESTING FUTURE ENHANCEMENTS

If you would like to submit requests for enhancing the system, please submit your ideas through one of the following methods:



### Customer Success Manager (CSM)



### Customer Focus Group

Your CSM can submit Ideas to our  
Perfective Change Management on  
your behalf

Meet with other Trial Interactive customers for an  
immersive Focus Group Forum:

- Focus Group Q&A
- Early Access
- Hosted Beta
- Usability Studies

## 11. Approvals

### Product Owner

Name: Jay Smith	Title: Senior Director, Product Management
Signature: Reason for signature: Date:	

### Quality Assurance

Name: Conor McCabe	Title: Senior QA Specialist
Signature: Reason for signature: Date:	