

Ideagen Quality Management (Qualtrax) Release Notes (2019 to 2021)

2021.53.0.0 – Release

- **Features and Enhancements**
 - [Decrease Create Document Page Load Time to Accommodate Higher User Counts](#)
 - Decrease Document and Folder Properties Load Time to Accommodate Higher User Counts
 - Final Changes to Remove Outdated Dependency from Manual File Transfer Page
 - Improve Efficiency of Permission Service
- **Defect Fixes**
 - [Null Date Value in Retired Document Report Causes Uh-Oh Error on Page Load](#)

2021.52.0.0 – Release

- **Features and Enhancements**
 - Continued Changes to Remove Outdated Dependency from Manual File Transfer page

2021.51.0.0 – Release

- **Features and Enhancements**
 - Remove Outdated Dependency from a portion of Manual File Transfer page

2021.50.0.0 – Release

- Defect Fixes

- [Email Reminder Title Not Displaying in Removal Success Popup](#)
- [Workflow Import Field Prefix Field Title is Incorrect](#)
- [Import Data Option Appears in Workflow Admin for User Despite Not Being a Responsible Party](#)

2021.49.0.0 – Release

- Features and Enhancements

- [Improve Workflow Administration Performance](#)
- Remove Outdated Dependency from Workflow Administration

2021.48.0.0 – Release

- Defect Fixes

- Enabled/Disabled Column Header in Testing Administration is Inaccurate
- [Create and Remove Actions Return Error in Testing, Training, and Email Reminder Administration for On-Premise Virtual Directory Configuration](#)

2021.47.0.0 – Release

- Features and Enhancements

- Updated Deployment Dependency Version

2021.46.0.0 – Release

- Features and Enhancements

- Remove Outdated Dependency from Training Administration & Email

2021.45.0.0 – Release

- **Features and Enhancements**
 - [Add Enabled/Disabled Column to Testing Administration](#)

2021.44.0.0 – Release

- **Features and Enhancements**
 - Remove Outdated Dependency from Testing Administration & Data Retention Activity Report

2021.43.0.0 – Release

- **Features and Enhancements**
 - [Add Retirement Information to Retired Document List Report](#)
 - Date Retired, Retired By, and Retirement Reason have been added to the Retired Document List Report to provide more at-a-glance information to the report. The Properties column has been removed.
 - Remove Inbox Message for Automatic File Transfer Upgrade

2021.42.0.0 – Release

- **Features and Enhancements**
 - Remove Outdated Dependency from Retired Document List Report

2021.41.0.0 – Release

- **Features and Enhancements**
- [Warn User when Using Outdated Version of Automatic File Transfer](#)
 - *Note: A message will be displayed in Inbox to prompt Automatic File Transfer upgrade. Existing versions of Automatic File Transfer can no longer be used.*
- **Defect Fixes**
- Security Fix for Launched Workflows

2021.40.0.0 – Release

- **Features and Enhancements**
 - Qualtrax deployment process improvement
- **Defect Fixes**
 - [Loop Occurs with Automatic File Transfer Download](#)

2021.39.0.0 – Release

- **Features and Enhancements**
- Cache Collapsed/Expanded User Settings in My Workspace
 - *Note: My Workspace is a newly-created module that requires further development. It will not be made available to all standard customers until development is complete.*

Note: A previous revision of release notes inaccurately indicated that the automatic file transfer was included in this release. We have corrected this mistake and those changes are included in the 2021.40.0.0 release (see details above).

2021.38.0.0 – Release

- **Features and Enhancements**
- Add the Ability to Collapse/Expand Sections in My Workspace
 - *Note: My Workspace is a newly-created module that requires further*



development. It will not be made available to all standard customers until development is complete.

- **Defect Fixes**
 - [Cloning Workflow Definitions Causes Issue with Custom Personnel Fields](#)

2021.37.0.0 – Release

- **Defect Fixes**
 - Scheduled Tasks for Deleted Report Instances Removed via Update

2021.36.0.0 – Release

- **Features and Enhancements**
 - Update the URL for My Workspace

- *Note: My Workspace is a newly-created module that requires further development. It will not be made available to all standard customers until development is complete.*
 - Implement Reporting Performance Improvement via Consolidated Queries as Default Functionality for Reports
 - **Defect Fixes**
 - [Process for Others Permission Description Includes Ability to Check-In](#)
-

2021.35.0.2 – Hotfix

- **Defect Fixes**
 - Correct Unpopulated Custom Date Field Values That Were Being Displayed as 1/1/0001 in Workflow Reports, GET Workflow Field API Responses, and GET Date Field API Responses (Workflow Date Field)
-

2021.35.0.1 – Hotfix

- **Defect Fixes**
 - [Invalid Date Included in Reports for Launched Workflow Date Fields That Do Not Contain a Value](#)
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2021.35.0.0 – Release

- **Features and Enhancements**
 - Exclude Web File Backup from Qualtrax-Hosted Upgrade Tool
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2021.34.0.0 – Release

- **Features and Enhancements**
- Security Improvements (HTML Documents including Custom Homepage)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of*

webpage code, with the following exceptions:

- Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Workflow HTML Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- HTML Document Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- HTML Document Content (including custom Homepage) can still include HTML formatting achieved with the use of [allowed tags and attributes](#), with additional allowance of the style tag.

2021.33.0.0 – Release

- Defect Fixes

- [Error Occurs Intermittently When Saving Changes in Standard Hosted Sites](#)
- [Scheduled Report Delivery Still Attempted After Report Instance is Removed](#)

Note: A previous revision of release notes inaccurately indicated that security improvements for HTML document content were included in this release. We have corrected this mistake and those changes are included in the 2021.34.0.0 release (see details above).

2021.32.0.0 – Release

- Features and Enhancements

- Sort Workflow Instances by Step in My Workspace
 - *Note: My Workspace is a newly-created module that requires further development. It will not be made available to all standard customers until development is complete.*

2021.31.0.0 – Release

- **Features and Enhancements**

- Remove Unnecessary Markup from Default Qualtrax Homepage
 - Remove Restoration of Homepage from Web Backup that Occurs on Qualtrax Upgrade
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2021.30.0.0 – Release

- **Features and Enhancements**
 - Adjust Email Reminder Type from Proactive to Approaching Due Date to Match Inbox Status Terminology
 - **Defect Fixes**
 - [Route Exception Not Properly Imported When List Field Value Used for Exception Does Not Match List Field Value ID](#)
 - [Some French Terms Inaccurately Translated to Polish](#)
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2021.29.0.0 – Release

- **Features and Enhancements**
 - Adjust Verbiage of Setting that Disables the Alter Workflow Instances Permission for a Workflow Definition
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2021.28.0.1 – Hotfix

- **Defect Fixes**
 - Improve Connection Handling in Workflow Instances
-

2021.28.0.0 – Release

- **Features and Enhancements**
 - Improve Reports Performance
- **Defect Fixes**
 - Report Queries Do Not Filter by Workflow Definition in Security Checks

2021.27.0.0 – Release

- **Features and Enhancements**
 - Improve Reports Performance

2021.26.0.0 – Release

- **Features and Enhancements**
 - Add Document Tasks to My Workspace
 - Sort Workflow Definitions Alphabetically by Title in My Workspace
 - Sort Workflow Instances by ID in My Workspace
 - Add Separate Sections for Workflows to Collaborate On in My Workspace
 - *Note: My Workspace is a newly-created module that requires further development. It will not be made available to all standard customers until development is complete.*

2021.25.0.0 – Release

- **Features and Enhancements**
 - Add My Workspace as an Alternative Task View
 - *Note: My Workspace is a newly-created module that requires further development. It will not be made available to all standard customers until development is complete.*

2021.24.0.1 – Hotfix

- **Defect Fixes**
 - Improve Connection Handling in Workflow Instances

2021.24.0.0 – Release

- **Features and Enhancements**
 - Security Improvements (Smart Restrictions)

- *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - *Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - *Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - *Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - *Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - *Workflow HTML Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - *HTML Document Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
- Remove the About Page
 - *Note: Information previously provided on this page has been moved to the navigation menu for easier access*

2021.23.0.0 – Release

- **Features and Enhancements**
 - [Improve Visibility to Qualtrax Version Number & Copyright](#)
- **Defect Fixes**
 - [Approval Record Time & Comment Incorrect when User Approves For 2nd Time On Behalf of Other User](#)
 - [Indexer Replaces Valid Index Files with Invalid Files After Index Failure](#)

2021.22.0.0 – Release

- **Features and Enhancements**
 - Adjust Header for Expiration Review in Document History
- **Defect Fixes**
 - [Child Workflow History Launch Date Inaccurately Reflects the Initiation Date of the Parent Workflow](#)

2021.21.0.0 – Release

- **Features and Enhancements**
 - Add Customer Portal Access to Navigation Menu
 - **Defect Fixes**
 - [Training Instance Permission Doesn't Give View Access While in Sign Off or Incomplete](#)
 - Reduce Repeated Errors from Automatic File Transfer
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2021.20.0.0 – Release

- **Features and Enhancements**
 - Security Improvements (Documents)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Workflow HTML Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - HTML Document Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Remove HTML Search & Replace for Documents
 - Remove Unused Analytics Setting

2021.19.0.0 – Release

- **Features and Enhancements**
 - Security Improvements (Documents)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*

- Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Workflow HTML Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- HTML Document Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Remove Hover Information from Report Bar Graphs
- **Defect Fixes**
 - Email Client Disposal Issue Causes Memory Leak in Qualtrax Service

2021.18.0.0 – Release

- **Features and Enhancements**
 - Security Improvements (Common Scripts, Workflow Headers and Footers, & HTML Document Headers and Footers)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Workflow HTML Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - HTML Document Headers and Footers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Remove Custom Field Custom Script Functionality to Improve Security
- **Defect Fixes**
 - Special Characters in Workflow Search Results Not Displayed Correctly
 - Special Characters in Group Favorites Menu Not Displayed Correctly

2021.17.0.0 – Release

- **Features and Enhancements**
 - Security Improvements (Reports & Common Scripts)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - **Defect Fixes**
 - Hosted Qualtrax Error Logs Do Not Contain Site Identifier
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2021.16.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Reports)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

2021.15.0.1 – Hotfix

- **Defect Fixes**

- Workflow Instance Re-Assigned Unexpectedly in Specific Use Case

2021.15.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Reports)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Add iframe to [Allowed HTML Tags](#)

- **Defect Fixes**

- [Qualtrax Dashboard Does Not Load](#)
- [Report Instance Titles Being Removed on Upgrade](#)

2021.14.0.0 – Release

- **Features and Enhancements**

- Add Norwegian (Bokmål) Language Option
- Security Improvements (Reports)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

2021.13.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Workflows, Testing, & Training)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Training Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Test Intros, Questions, and Answers can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Reduce Database Calls to Improve Performance

2021.12.0.0 – Release

- **Features and Enhancements**

- Add the Ability to Delete Workflow Instances via API
- Remove Override of Default Text Highlight Color in Qualtrax
- Security Improvements (Workflows, Administration, Testing, & Training)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

2021.11.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Administration)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

2021.10.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Workflows & Administration)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

- **Defect Fixes**

- [Display Order & Time Delay Fields Allow for Non-Numerical Input](#)

2021.9.0.0 – Release

- **Features and Enhancements**
- Security Improvements (Workflows & Personnel)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- **Defect Fixes**
 - [Workflow Instances Generated From Blank Rows In Workflow Instance Import](#)

2021.8.0.0 – Release

- **Features and Enhancements**
- Security Improvements (Workflows)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

2021.7.0.0 – Release

- **Features and Enhancements**
- Product Maintenance for Hosted Infrastructure

2021.6.0.0 – Release

- **Features and Enhancements**
- Security Improvements (Workflows)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*

- **Defect Fixes**
- *Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
- *Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*

- Security/Access Inconsistency for Attachments

2021.5.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Hide Unsupported External Source option for List Fields in Custom Field Administration for Hosted Sites

- **Defect Fixes**

- Script Text Stripped from Field Title in Workflow Definition New Fields Areas

2021.4.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

- **Defect Fixes**

- List Field Titles in Route Exceptions Do Not Render Special Characters

2021.3.0.1 – Hotfix

Defect Fixes

- [System Settings Save Causes Loss of Application Access for Hosted Sites](#)

2021.3.0.0 – Release

- **Features and Enhancements**
- Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- **Defect Fixes**
 - [Error Occurs in Smart Restrictions when Expanded Inbox Item Cookie Contains Apostrophe](#)

2021.2.0.0 – Release

- **Features and Enhancements**
- Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Remove Required By Column from Subform Custom Field Administration
- **Defect Fixes**
 - [User with Alter Tree and View/Edit All Documents Permissions Cannot Add Folder](#)
 - [Unable to Access System Settings if Email Port Value is Not Set](#)

2021.1.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Defect Fixes
 - [Unable to Review/Approve when Out of Office Exists within Subsequent Serial List](#)

2020.26.0.0 – Release

- Features and Enhancements
 - Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Remove Personnel Image Location Setting & Use Default Icon for Personnel without Profile Images
 - Remove Temporary Custom Content Security Policy Setting
- Defect Fixes
 - [User Creation via API Can Cause Inability to Access Qualtrax](#)
 - [Custom Folder Fields Appear in Folder Properties](#)

2020.25.0.0 – Release

- Features and Enhancements
 - Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

- *Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - Remove Usage Logs feature from System Settings
 - Remove Body Format setting for emails & send Qualtrax emails in HTML format
- **Defect Fixes**
 - [Hosted Site Email Format Switched to Plain Text Upon System Settings Save](#)
 - Resolved via removal of the Body Format setting
 - Remove obsoleted settings from Qualtrax database
 - Prevent caching of critical configuration settings

2020.24.0.0 – Release

- **Features and Enhancements**
 - Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - *Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - *Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - Remove Custom On-Change Event Script Functionality from Custom List Fields to address security vulnerabilities

2020.23.0.0 – Release

- **Features and Enhancements**
 - Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - *Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - *Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).*
 - [Add the Ability to Require TLS Encryption for Qualtrax Emails](#)
- **Defect Fixes**
 - [Standard Description Enforces 100 Character Limit](#)
 - *Note: The character limit for the Description field in Standards*



Administration has been increased to 5,000.

2020.22.0.0 – Release

- **Features and Enhancements**
- Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- Reduce configuration setting caching interval to one minute

2020.21.0.0 – Release

- **Features and Enhancements**
- Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
- [Hide Logging from System Settings Interface for Hosted Sites](#)

2020.20.0.0 – Release

- **Features and Enhancements**
- Security Improvements (Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting



achieved with the use of [allowed tags and attributes](#).

- [Hide Email Settings and Web URL Web Setting for Hosted Sites](#)
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2020.19.0.0 – Release

- **Features and Enhancements**

- Security Improvements (Inbox & Custom Fields)
 - *Note: These security improvements include a change to the allowance of webpage code rendering across the application. Ultimately all user-generated output will be encoded and not allow rendering of any type of webpage code, with the following exceptions:*
 - Custom Field Titles can still include HTML formatting achieved with the use of [allowed tags and attributes](#).
 - Custom Field Descriptions can still include HTML formatting achieved with the use of [allowed tags and attributes](#).

- **Defect Fixes**

- [File Cannot be Uploaded on the Replace Document Page](#)
 - [Group Remains in Test Taker List After Disable or Deletion](#)
 - [Reports and Search Fail When Workflow List Field Value Contains Ampersand](#)
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2020.18.0.0 – Release

- **Features and Enhancements**

- [Adjust Indexer Action to Incremental Indexing to Improve Performance](#)
 - [Remove BETA components from Dashboards](#)
 - [Sunset Legacy User Interface](#)
 - Add Login Name Requirement to All Password Verification Areas
 - Sunset Diagnostics Utility Server Tool
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2020.17.0.0 – Release

- **Features and Enhancements**

- [Prevent Deletion of Qualtrax Document Used as Homepage](#)
- [Block Browser Auto-Fill in Password Verification Fields](#)
- Remove Unsupported Replication Module for Qualtrax-Hosted Sites

2020.16.0.0 – Release

- Defect Fixes
 - [Content Security Policy Can Prevent Rendering of PDFs](#)

2020.15.0.0 – Release

- Features and Enhancements
 - [Add Ability for All Users to View Custom Homepage Content](#)
 - [Prevent Retiring of Qualtrax Document Set as Current Custom Homepage](#)
 - [Remove Editability of Indexer Scheduled Tasks for Qualtrax-Hosted Sites](#)
 - Update Qualtrax Document and Workflow Indexer Dependencies
- Defect Fixes
 - [Reports or Search Filtered by List Field Value Containing Quotes Do Not Return Results](#)

2020.14.0.0 – Release

- Features and Enhancements
 - [Added Login Redirect Setting to Customize User Login Experience](#)
 - This setting allows site-level customization of the page users are redirected to upon login from the following options: Inbox, Homepage, or My Dashboard.

The screenshot shows the 'Web Settings' configuration page for Ideagen. The page has five tabs: 'General Information', 'Email Settings', 'Web Settings' (selected), 'Passwords', and 'Document Control'. The 'Web Settings' section includes the following fields and options:

- Web URL:**
- Dedicated Session Timeout (Minutes):**
- Concurrent Session Timeout (Minutes):**
- Testing User Session Timeout (Minutes):**
- Default language for logged out users:** (dropdown menu)
- Activate New Qualtrax Look and Feel!**
- Homepage:** [Select](#) [Clear](#)
- Login Redirect:** (dropdown menu with options: Inbox, Homepage, My Dashboard)

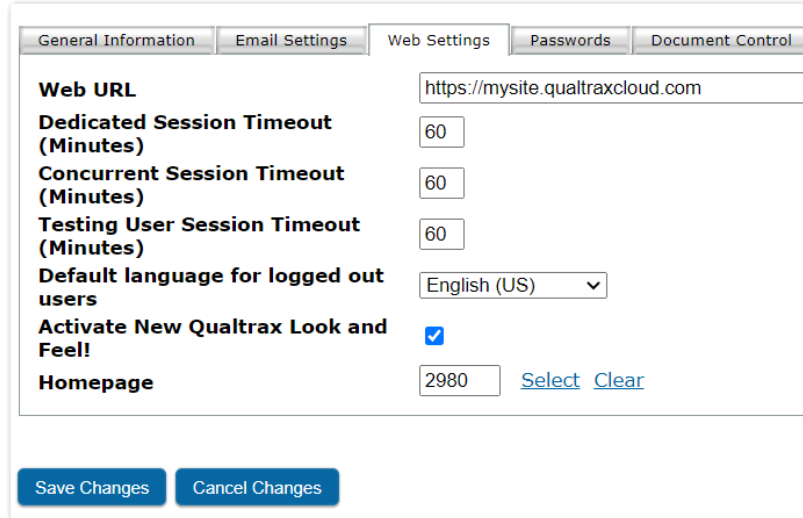
At the bottom of the form are two buttons: [Save Changes](#) and [Cancel Changes](#).

- Strengthened the application Content Security Policy
-

2020.13.0.0 – Release

- **Features and Enhancements**

- [Added ability to manage custom Homepage via System Settings](#)



General Information	Email Settings	Web Settings	Passwords	Document Control
Web URL		https://mysite.qualtraxcloud.com		
Dedicated Session Timeout (Minutes)		60		
Concurrent Session Timeout (Minutes)		60		
Testing User Session Timeout (Minutes)		60		
Default language for logged out users		English (US) ▾		
Activate New Qualtrax Look and Feel!		<input checked="" type="checkbox"/>		
Homepage		2980 Select Clear		

[Save Changes](#) [Cancel Changes](#)

- [Added link to open Document Tree folder location in Folder Fields](#)



- [Removed System Actions Module](#)
- [Removed Qualtrax logo and welcome message from Common Scripts](#)

- **Defect Fixes**

- [Error occurs in User Group Importer and groups are not imported](#)
- [Test Instances are not cancelled when user is disabled](#)
- [URL Validation Error is Inaccurate for Favorite Creation](#)

2020.12.0.1 – Hotfix

- **Defect Fixes**

- [Document Tree Not Displayed for User Logged In through 2020.12.0.0 Update](#)

- [Caching Issue May Cause Display Issues upon Qualtrax Update](#)
-

2020.12.0.0 – Release

- **Features and Enhancements**

- Limit External Favorites to Web URLs
- [Validate Favorite URLs upon Favorite Creation & Update](#)
- Adjusted Title Page URL to use new Homepage nomenclature

- **Defect Fixes**

- [Login Prompt within Document Tree upon Logout in Other Tab/Window](#)
-

2020.11.0.0 – Release

- **Features and Enhancements**

- [Retain Qualtrax Service user upon Qualtrax Update](#)
- Update QAC command descriptions
- Added functionality to the Update Tool to allow updating the web site, service, and database independently
 - *Note: This functionality is not supported for on-premise updates.*

- **Defect Fixes**

- [Long Running Query Locks Inbox Upon Training Cancellation](#)
-

2020.10.0.0 – Release

- **Features and Enhancements**

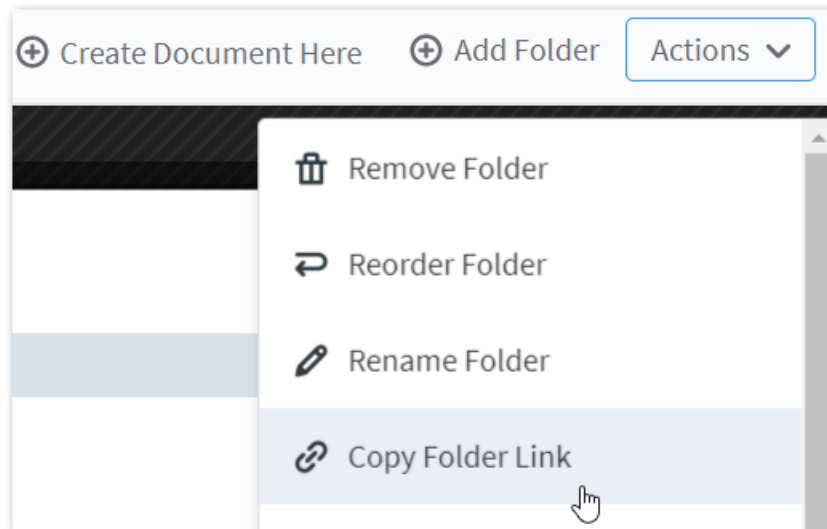
- Remove legacy update functionality from Qualtrax Updater
 - *Note: If current Qualtrax version install is older than 2020.1.0.0, then a legacy updater will need to be run before current updater. Reach out to Support for more information.*
- [Remove Support Email Functionality from Qualtrax Updater](#)
- Validate Web Directory Path Access in Qualtrax Updater
- [Increase the size of the URL field in the Favorites Administration](#)

- Defect Fixes

- [Qualtrax Updater throws error for legacy config when run in Quiet Mode](#)
 - [Creating Favorite to Open in Current Window Causes Issue with iFrames](#)
-

2020.9.0.0 – Release

- **Features and Enhancements**
 - [Add the ability to Hyperlink to Browse Tree Folders](#)



- [Update the Qualtrax Favicon to Align to Current Logo](#)

2020.8.0.0 – Release

- **Features and Enhancements**
 - [Reduce Number of Clicks to Upload File in Documents & External File Fields](#)
 - [Combine Error and Logging Tabs in System Settings & Remove Error Log File Paths](#)
 - [Log Error when Indexer Cannot Access File\(s\)](#)

2020.7.0.1 – Hotfix

- **Defect Fixes**
 - [Report Instance is not saved with security of report from which it is created](#)

2020.7.0.0 – Release

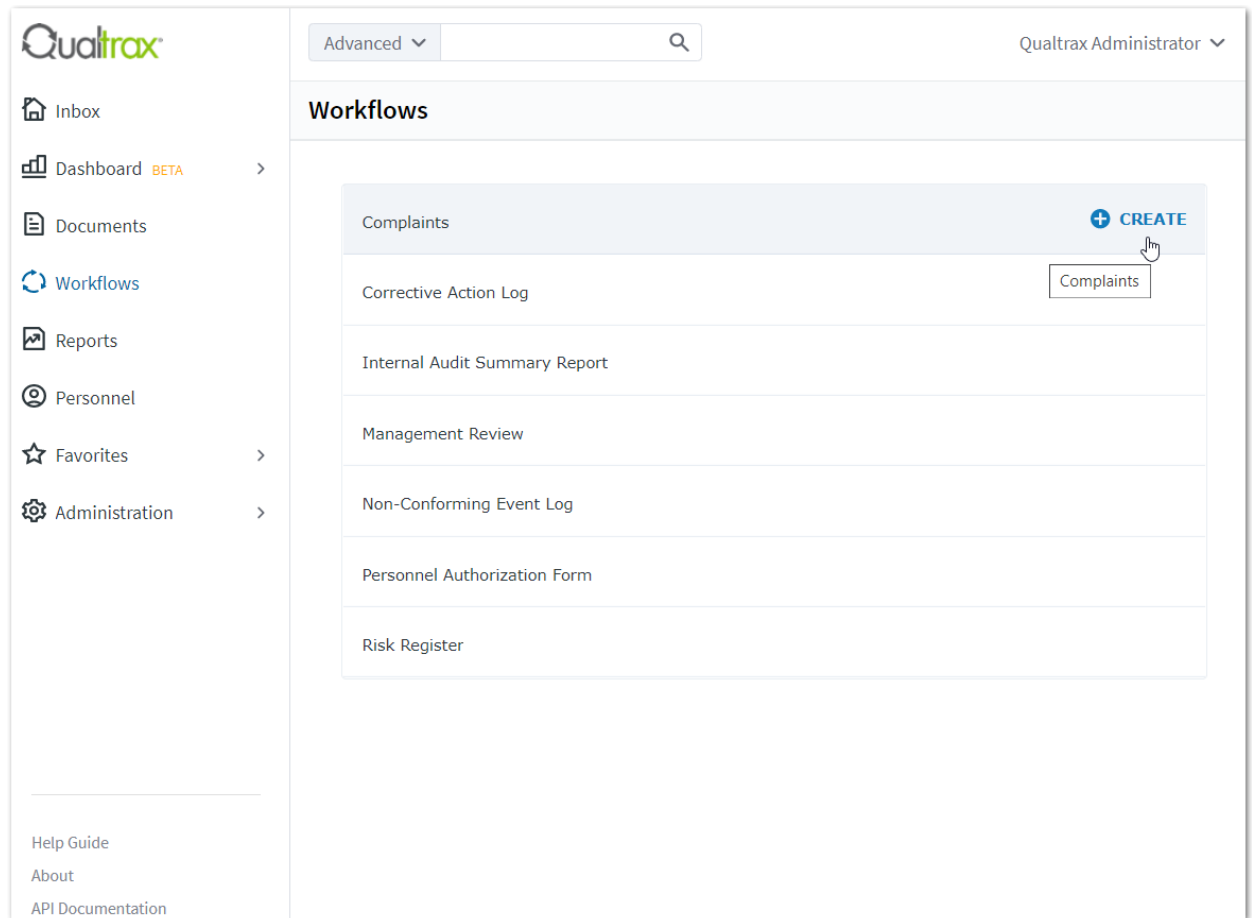
- [Features and Enhancements](#)

- Remove Document Storage Folder Settings from System Settings*
- Update Qualtrax Service Logging Path and Make Configurable via Qualtrax Administrative Console (QAC)*
- Remove Email and Windows Event Log from Error Log Action Options*
- Remove Diagnostics Utility System Action & Scheduled Task
- [Prevent Visitors from Creating Report Instances](#)
- **Defect Fixes**
 - [Error occurs for inaccessible Report Designer in new user interface](#)
 - [Unlimited Dedicated License Key is limited to 9,999 dedicated licenses](#)
 - [Report Designer appears in context menu for user without Edit security](#)
 - [Error Accessing Service Logging Path causes Qualtrax Service to Stop](#)

**Note: Settings removed from the web application can be viewed and updated via Qualtrax Administrative Console (QAC) with Qualtrax Support assistance.*

2020.6.0.0 – Release

- **Features and Enhancements**
 - [Add Status to Test Instance](#)
 - [Add Workflows Page to improve workflow title readability](#)



- **Defect Fixes**

- [Completed test instances viewed from custom test report hyperlink don't show results](#)
- [User with View Test Instance permission cannot view others' test instances](#)
- [User with Data Retention permission cannot delete test instance in New Qualtrax Look and Feel](#)

2020.5.0.1 – Hotfix

- **Defect Fixes**

- Audit Trail records not created when updates are made via Qualtrax Administrative Console

- **Features and Enhancements**
 - Add the ability to get configuration settings via new Qualtrax Administrative Console
 - Add the ability to set File Storage and Logging configuration settings via new Qualtrax Administrative Console
 - Implement configuration caching to improve performance
 - [Remove second version number to eliminate confusion](#)
 - **Defect Fixes**
 - [Workflow Responsible Party E-mail Variable is Blank](#)
 - [Unable to Access Completed Test Instance with New UI](#)
 - [View Error clutters High Logs](#)
-

2020.4.0.4 – Hotfix

- **Defect Fixes**
 - Resolve security vulnerability

2020.4.0.3 – Hotfix

- **Features and Enhancements**
 - Remove ability to add, edit, and remove custom system actions from the user interface (Contact Support for custom system action needs)
-

2020.4.0.2 – Hotfix

- **Defect Fixes**
 - Backup of Qualtrax config does not account for unique Qualtrax instance name
-

2020.4.0.1 – Hotfix

- **Features and Enhancements**
 - Backup of Qualtrax config and log to Updater Logs

2020.4.0.0 – Release

- [Features and Enhancements](#)

- [Add Option to Authenticate with SQL Server using Windows Authentication](#)
 - Fall back to Windows Event Log, and corresponding UI error, when error logs are unable to write to the log file
 - Qualtrax Administrative Console (Command Line Interface [CLI]) Framework
 - [Validate SQL Server 2019](#)
 - **Defect Fixes**
 - [Dashboards: Hover information cut off in Workflow Tasks by Type](#)
<https://qualtrax.ideas.aha.io/ideas/QTX-I-2348>
 - [Due Date not displayed in Inbox when item is New via Custom Date](#)
-

2020.3.0.3 – Hotfix

- **Defect Fixes**
 - [Azure App Insights Can Cause Site to be Unreachable](#)
<https://qualtrax.ideas.aha.io/ideas/QTX-I-2348>
-

2020.3.0.2 – Hotfix

- **Defect Fixes**
 - Fixed issue around cancelled test instances <https://qualtrax.ideas.aha.io/ideas/QTX-I-2348>
-

2020.3.0.1 – Hotfix

- **Defect Fixes**
 - [Parent Group Membership restored for users upon re-enabling subgroup](#)
-

2020.3.0.0 – Release

Notes for This Release:

We have made improvements to the Client Tools and recommend reinstalling, but it is not required for utilizing basic functionality.

- **Features and Enhancements**

- Create Document performance improvement
- Security Updates
- [Security Monitoring](#)

- **Defect Fixes**

- [Diagnostics Utility Packaging does not complete](#)

- [Qualtrax Diagnostics Scheduled Task does not Function](#)
- [Standards Importer has outdated dependencies](#)

2020.2.0.1 – Hotfix

- **Defect Fixes**
 - Fixed issue around Workflow instance Responsible Parties

2020.2.0.0 – Release

- **Features and Enhancements**
 - Security Updates
- **Defect Fixes**
 - [Error occurs with Session Checks on multiple Pages](#)
 - [Unique Key constraint error occurs with simultaneous user access](#)
 - [Get Field API Request returns 404 when not editable on closed step](#)

2020.1.0.2 – Hotfix

- **Defect Fixes**
 - Fixed issue around subform subfields when using API

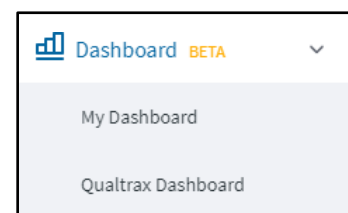
2020.1.0.1 – Hotfix

- **Defect Fixes**
 - [My Dashboard and Qualtrax Dashboard - Inbox Reports are included in Training counts](#)

2020.1.0.0 – Release

Requirements for This Release:

In order to utilize the new Qualtrax Dashboard feature be sure to opt in to the new UI if you haven't already by checking the box "Activate New Qualtrax Look and Feel!" in System Settings. You





will also need to give the new permission, View System Dashboards, to any groups you want to be able to view Qualtrax Dashboard. Once the permission is applied those users will see Qualtrax Dashboard as an option in the Navigation Menu.



- **Features and Enhancements**
 - [Qualtrax Dashboard](#)
 - Permission “View System Dashboards”
 - Security Updates
 - **Defect Fixes**
 - [Pending Workflow Instance has no Responsible Party](#)
 - [New Document Appears Expedited When Custom Date Field is Blank](#)
 - [Backup Inbox Time Reminder Not Used for My Dashboard Status when date field is blank](#)
 - Documents with Custom Date Unpopulated appear as late immediately when Inbox Time reminder exists
-

2019.8.0.1 – Hotfix

- **Defect Fixes**
 - [List Field Option Display Names are swapped upon form resubmission](#)
-

2019.8.0.0 – Release

- **Features and Enhancements**
 - Security Updates
 - **Defect Fixes**
 - [Workflow Inbox Item Shows Due Date as Date Workflow Entered Step](#)
 - [Document Task uses Process Date instead of Custom Date Field for Due Date & Inbox Status](#)
-

2019.7.0.0 – Release

- **Features and Enhancements**
 - [Training Expiration by Completion Date Including Reporting Option](#)
 - Security Updates
-

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- Defect Fixes

- [Header Footer and Workflow Designer Tool Install Leaves Old Installation in Programs](#)
- [Auto Login not working after security improvements to cookies](#)

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2019.6.0.0 – Release

Requirements for This Release:

Be sure to upgrade to .net 4.8 (server and client machines) and reinstall the client tools upon upgrade. On-premise customers can uninstall TLS 1.0 and 1.1 after upgrading to this release since there is no longer a dependency on an older version of TLS with Client Tools.

- **Features and Enhancements**
 - [Update .Net framework for AFT / other client tools to a version compatible with TLS 1.2](#)
 - Security Updates
 - **Defect Fixes**
 - Items in Inbox for Editor Who Does Not Have Edit Security to Dependencies
-

2019.5.0.2 – Hotfix

- **Defect Fixes**
 - [Saving changes to a workflow instance removes disabled users from personnel custom field](#)
-

2019.5.0.1 – Hotfix

- **Defect Fixes**
 - Fixed security vulnerability related to tamper flags
 - Fixed security vulnerability related to document accessibility
-

2019.5.0.0 – Release

- **Features and Enhancements**
 - Security Updates
 - Update client tool installers
 - Permission for "Run Common Scripts"
-

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- Defect Fixes
 - Common Scripts Security fixes

2019.4.0.2 – Hotfix

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- **Defect Fixes**
 - [Subform rows not being copied over on workflow launch](#)

2019.4.0.1 – Release

- **Features and Enhancements**
 - [My Dashboard \(beta\) with click through to Inbox](#)
 - Feedback link in My Dashboard
 - Security Updates
 - [Remove Feature Flag from server regarding quick search](#)
 - [Remove Unused English Terms for All Languages](#)
- **Defect Fixes**
 - [Document Manager Permission info should not reference approval](#)
 - Dependent Documents Checked Out When User Does Not have Edit Access

Notes to Our Customers

FDA Workbook

If you utilize our FDA Validation Workbook, please note that the workbook and other FDA materials will be available thirty (30) days after each new major release.

Updated Look and Feel

Starting with Release 2018 R3, to provide administrators with the ability to manage the transition to the New Qualtrax Look and Feel, activation of the updated Navigation Wrapper as well as the changes outlined in these Release Notes, requires turning on the feature from Administration > System Settings > Web Settings tab. Simply check the box "Activate New Qualtrax Look and Feel!" to opt-in to the new experience.

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System Settings

General Information | Email Settings | **Web Settings** | Passwords | Error Handling | Document Control | Test and Training | Workflow | Logging

Web URL	<input type="text" value="http://WIN-VJIMF14Q7JF/Qualtrax/"/>
Dedicated Session Timeout (Minutes)	<input type="text" value="60"/>
Concurrent Session Timeout (Minutes)	<input type="text" value="60"/>
Testing User Session Timeout (Minutes)	<input type="text" value="60"/>
Default language for logged out users	<input type="text" value="English (US)"/>
Activate New Qualtrax Look and Feel!	<input checked="" type="checkbox"/>

The Updated Look and Feel should only be activated at a time when there are no end users logged into your Qualtrax system. The change can cause navigational issues for users with active sessions and requires refreshing their session to correct the issue. This feature set is currently controlled by a toggle switch to provide administrators with the ability to manage when the updated UI is applied. This option will be removed in a future release to give our customers a reasonable amount of time to transition to the new User Interface. Additional communication will be provided prior to this default setting being applied.