RELEASE NOTES 2.0

SOFTWARE IDENTIFICATION

Matrix Requirements Medical Release 2.0

The main changes are:

- QMS Module
- ACL (Access Control Lists)
- Gates

NEW FUNCTIONALITY

F-FEAT-33 New Module - QMS

FEAT-215 QMS module
The QMS module consists of a QMS Editor and QMS Viewer. The **QMS Editor** has several preconfigured projects which allow the user to   - define processes and procedures   - work instructions   - do a risk analysis   - review and publish the QMS   - maintain CAPAs, HR, and Quality Records   The QMS Editor comes with a predefined content which can be used to speed up the development of a new QMS and perform a gap analysis against 13485   13485:2016 requirements preprepared to document a gap analysis   - standard predefined processes, which can be quickly adapted to cover large parts of the requirements   - a predefined CAPA project   - a configuration to allow review and publishing of processes and work instructions   The **QMS Viewer** is a simple static website which allows the users to quickly view, filter and search the procedures and work instructions.

F-FEAT-34 New Features

FEAT-254 Gate fields
A new field type "gate" has been added.

These gate fields can be added to any item category in order to lock or enable other fields depending on whether the gate has been approved, e.g. the following gate could be configured to lock all entry fields above the gate, once it has been approved.

Each gate requires approval by one or more group of users. If one user of each group passed the gate, the gate itself is approved. The above example needs the approval of 3 persons: Wolfgang and Yves and either John or Demo. The gate field can be configured to require a password when approving, see the administration guide for options.

Once the gate is fully approved it will lock all the fields above and/or enable all the fields underneath the gate, depending on its configuration. It is also possible to set one or more labels, upon approval of a gate.

FEAT-245 Document templates

It is now possible to define documents as templates to be used in other projects.
Usage
This is a multi-step process,
1) in the DOC you need to define who needs to approve the template

2) after the DOC has been archived, the approvers need to approve the SIGN

SIGN-35 Release Notes

TEMPLATES - (REQUIRED APPROVALS)

wolfgang	you need to approve this template
ann	not yet approved

password		Approve

3) once the SIGN has been approved by all, you need to specify in which projects it should be used as a template

SIGN-34 Release Notes
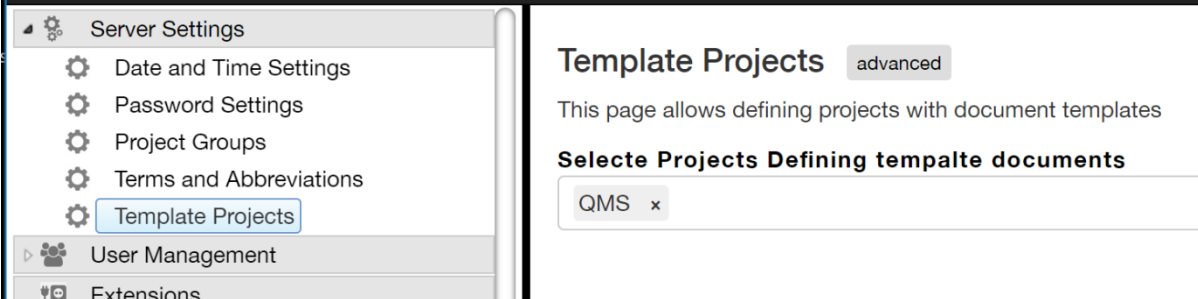
TEMPLATES - (DISTRIBUTION TO PROJECTS)

Approved by wolfgang (2018/Jan/14 10:15:06)

☑ **BAS Configuration Example 1**

☐ **COM Configuration Example 3**

Configuration

1) In the server settings "Template Projects" define one or more source projects, defining the templates.

MatrixRequirements Admin

- Server Settings
  - Date and Time Settings
  - Password Settings
  - Project Groups
  - Terms and Abbreviations
  - Template Projects
- User Management
- Extensions

Template Projects advanced

This page allows defining projects with document templates

Selecte Projects Defining tempalte documents

QMS ×

2) In the DOC and SIGN categories of these projects, define a field, of type "markAsTemplate"

Field Settings advanced delete

You can reorder fields using drag and drop within the same cate

Field Type: markAsTemplate

Field (id: 172206) allows to define DOC templates which can be

Field Name: Templates

3) In the Sign category tick the field to copy the field from the DOC

☑ **when creating the SIGN, copy the value of the field with the same name from DOC**

Note: the fields need the same name in both categories, in order for this option to be available.

FEAT-235 Reference to document templates

When copying and pasting documents or creating documents from templates (see FEAT-235 Reference to document templates), it is now possible to keep a reference to the source document.

TEMPLATE TRACE/SIGN-1

If you copy and paste a document or instantiate a template, this field is filled with the reference to the original document. The reference is shown as PROJECT/SIGN-ID or PROJECT/DOC-ID depending what the original document was.

Inside Matrix, it is rendered as a hyperlink from the DOC to its template.

Enabling the feature

To enable this features you need to add a special field to the DOC category using the administration client:

Open the project in the admin client and add a **sourceRef** field to the DOC category.

Add fields

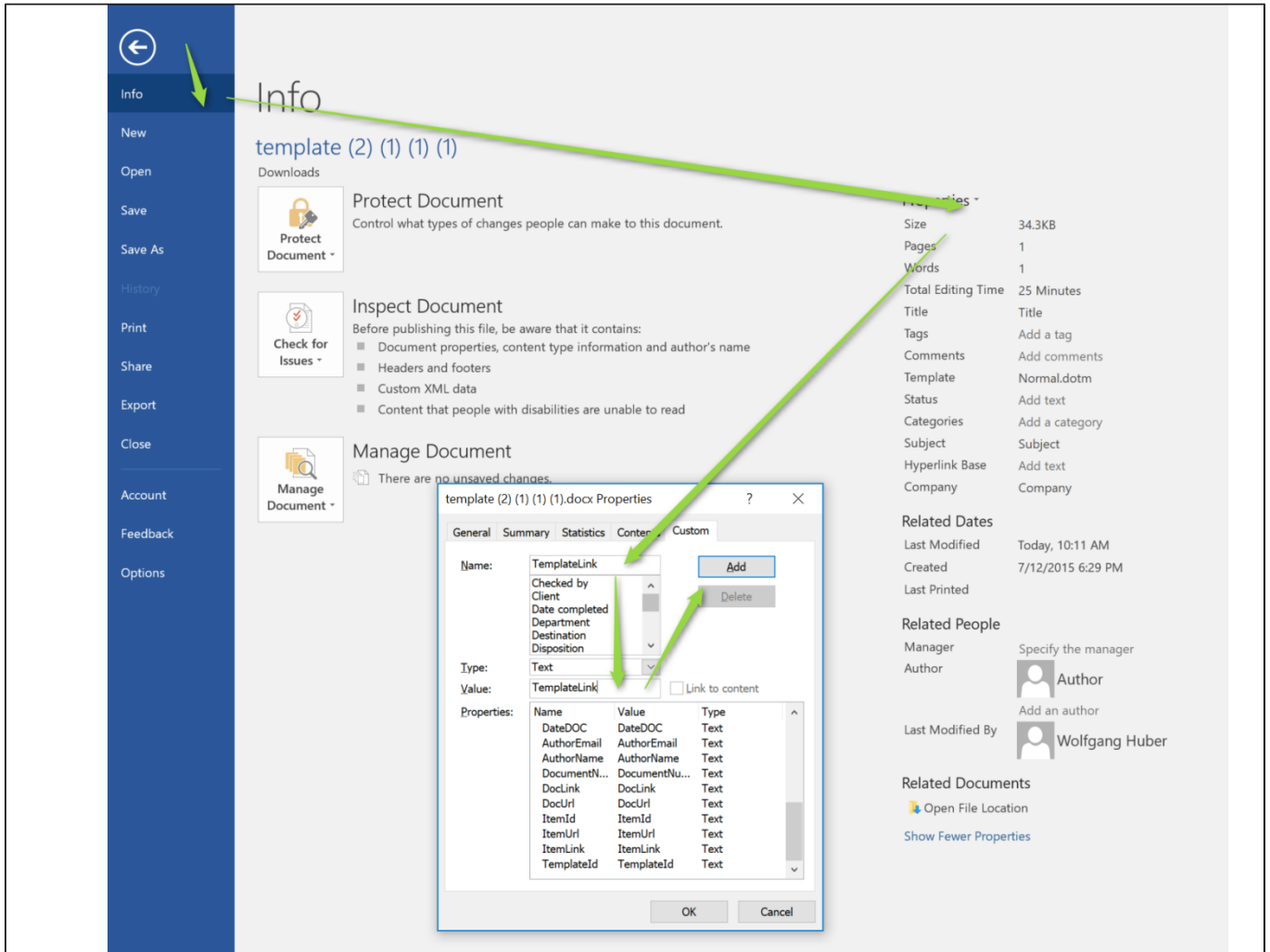See the manual for details of available fields.

Field Name:	Template
Field Type:	Source (Original Document) [sourceref]

Note: Normally this field should be read-only since the references are automatically created when creating documents.
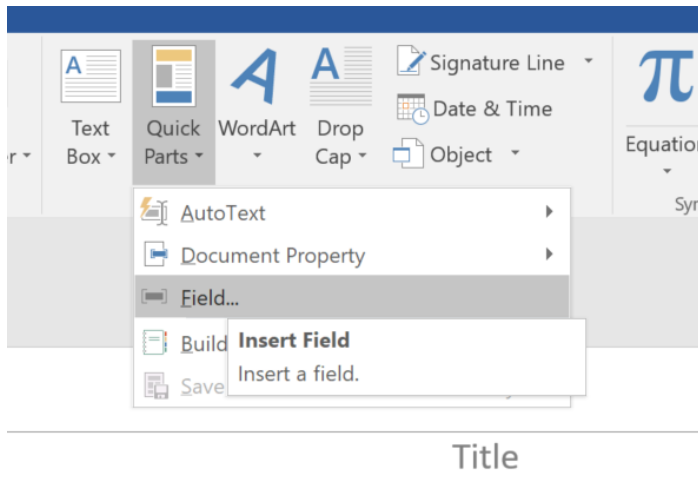
Showing template in Word documents

If you want it in your Word / PDF templates do the following:

1. For each project -> download the used word template in the admin client

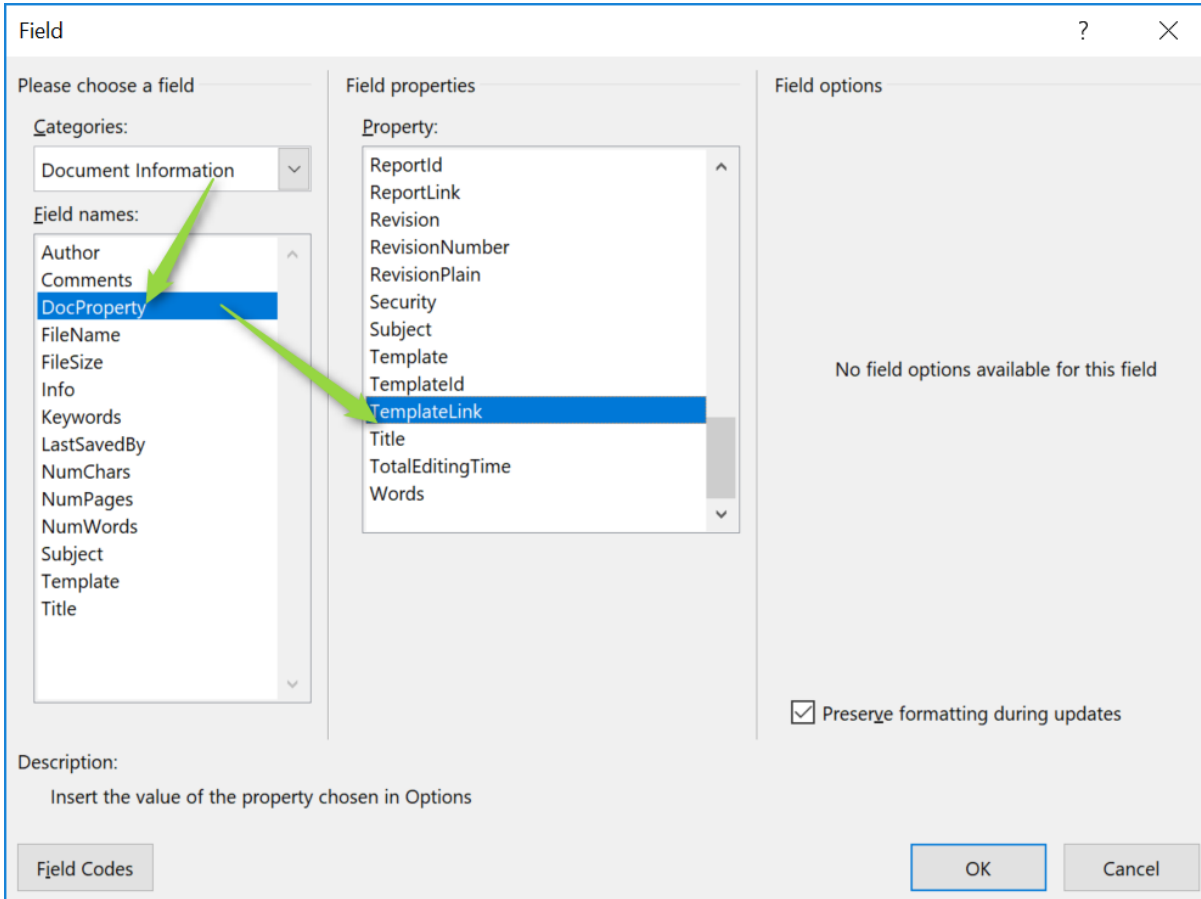2. Open it and add a new custom document property called **TemplateId**

3. in the word document insert in the header or footer through the

and then choose **TemplateId** as property:

FEAT-261 Controlled documents section: item tables

It is now possible to create document sections which show items details in a table. To do so, add a section "Items with fields in tabular form"

Once you have added the section you can configure it to include what you want to include

This is done by a comma-separated list of field names and possibly any of these keywords

- item: this will include the item id and title
- labels: will include set labels
- up / down: up or down traces

FEAT-264 **Global document option to not link into Matrix**

There is now a document option to not create hyperlinks into Matrix.

Instead, the links in (WORD/PDF) document will be point to the first fully rendered item inside the document.

Document Options

Table of content and header numbering:

☑ Enforce section numbering (instead of relying on Word)
☑ Do not use document title as heading
☑ Generate links into document instead of links to Matrix
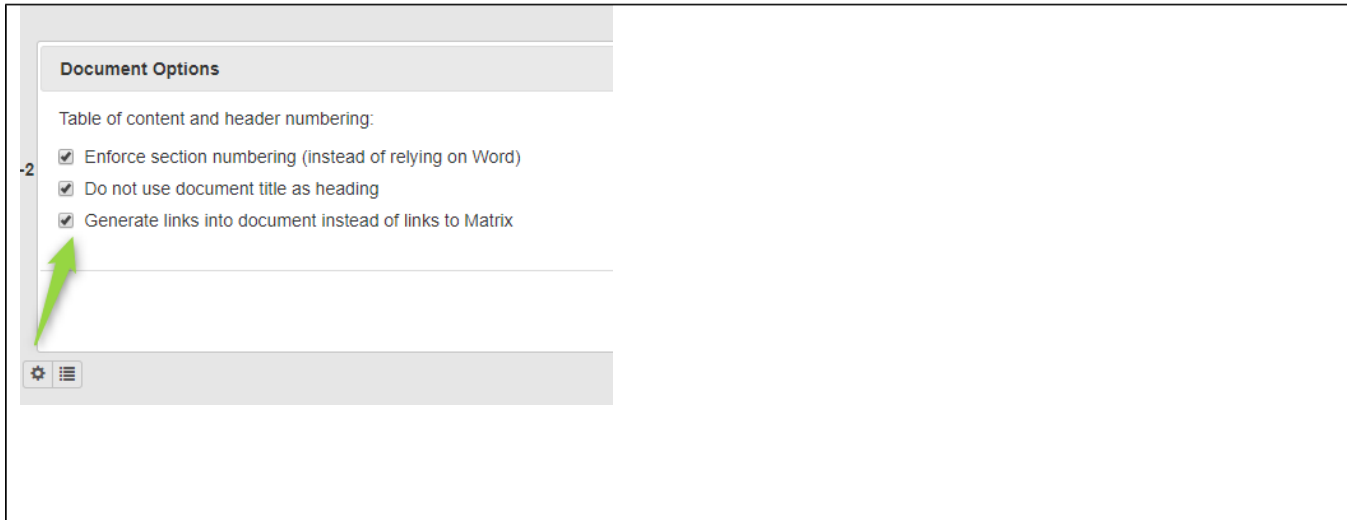
FEAT-263 Access Control Lists (ACL)

The administrators now have the ability to define a set of restrictions to what a group of users can do.

The principle is as follow:

Normally a user with read/write access to a project can do anything in that project.

If he is art of a restricted group in the ACL list however, his rights are defined by what is allowed to his group(s) in the ACL setup. If (s)he is member of mulitple groups his/her rights are the combination of the rights in his/her different groups.

FEAT-251 Support of URLs with mrql search expressions

You can now define URLs with a search expression using the syntax:

project_url?mrql:expression

e.g.

https://mycompany.matrixreq.com/MYPROJECT?mrql:outdated=1

will search for all outdated items in the project.

FEAT-219 Administrator can delete projects

The admin client has a new feature to delete projects. To do so select the project, press "Delete" and confirm.

FEAT-247 New experimental feature: Compare DOC and it's SIGNed

To compare documents, enable the feature in the admininistration client

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☑ **allow to compare two version of document in same project (through button under SIGN/DOC)**

For DOCs and SIGN elements find a new button to compare the document with the others:

- a DOC can be compared to all its previously signed versions

Compare to ... ▼   Archiv

    SIGN-1 SRS, Ver A
    SIGN-2 SRS, Ver B
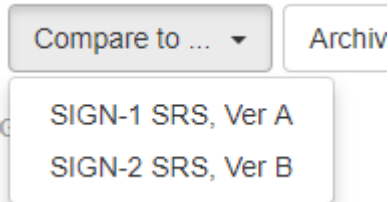
- a SIGN to it's current DOC and other SIGNed based on the same DOC

Compare to ... ▼

    Current DOC
    SIGN-2 test
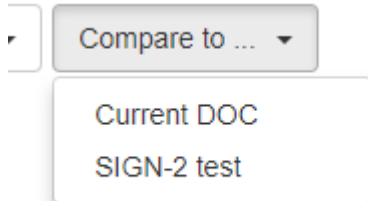
FEAT-231 Wiki style text input

The rich text editor has now the possibility to convert simple wiki style input to text when closing (saving) the editor. You can

- create lists by typing ***** in the beginning of a line (****** for indented, etc.)
- create numbered lists by starting line with **#**
- create lettered lists by starting line with **?**
- code blocks by writing code between lines with **{{{** and **}}}**.
- tables with **||header 1||header 2||** and **|cell 1|cell 2|**

formatting within cells or after bullets is removed!

Note: this needs to be enabled as user preference in the settings in the client.

FEAT-265 Auto-fill user / date fields

auto fill tables
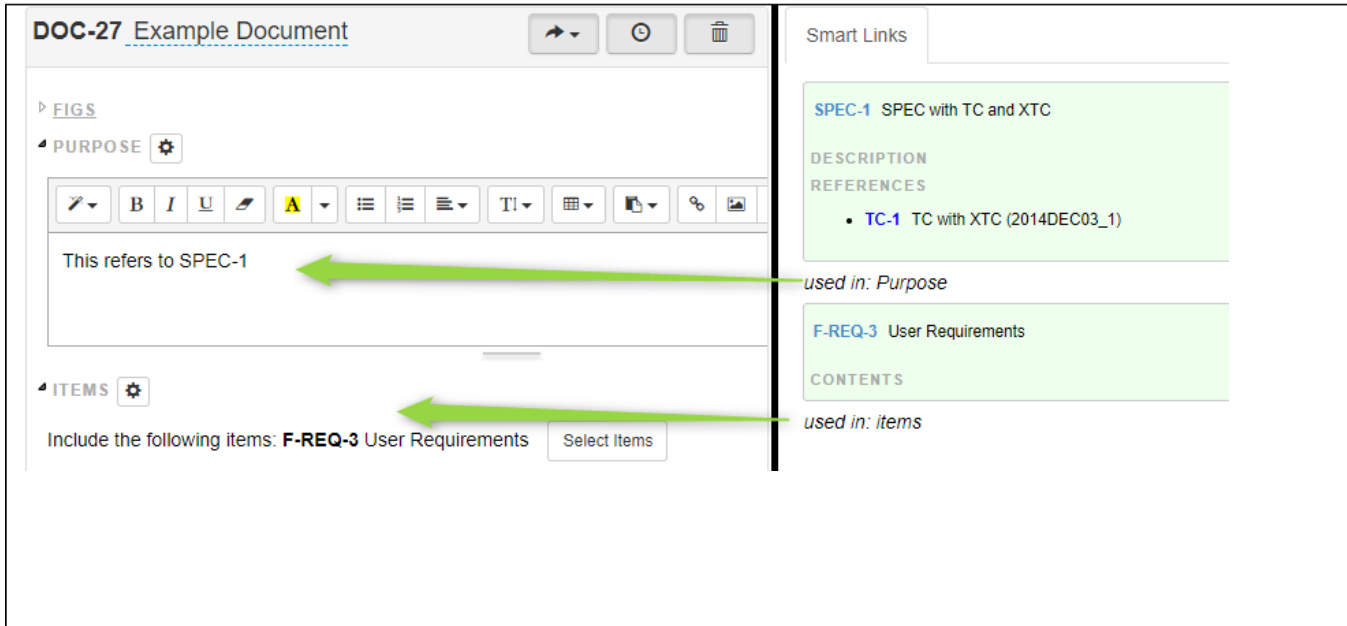
IMPROVEMENTS

FEAT-223 Allow changing access rights in user access overview	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/29 17:47:06	3

Product Changes / Release 2.0 / Improvements / Allow changing access rights in user access overview

Downlinks:
- **SPEC-145** User Access

Description

It is now possible to change the access of users in the project access overview page.

FEAT-224 Allow to move smart text macros from project to server	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/29 18:31:44	4

Product Changes / Release 2.0 / Improvements / Allow to move smart text macros from project to server

Downlinks:
- **SPEC-131** Project Terms and Abbreviations

Description

Using the admin client it is now possible to move smart text, terms and abbreviations which were defined for a specific project to the server, so that they can be used in all projects.
To do so select terms and abbreviations in the source project and click on "make global".

FEAT-229 Possibility to NOT show out-of-date links	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/31 10:23:36	3

Product Changes / Release 2.0 / Improvements / Possibility to NOT show out-of-date links

Downlinks:
- **SPEC-33** References

Description

The render options for the downlink control have a new property to not indicate out of date links.
To enable this, select the control showing the references (control of type 'links') and enable render options if they have not yet been enabled, by clicking on the "add render options for downlinks to DS button.
Afterwards, in the change in the advanced settings "ignoreOutOfDate" to "true".

	Author:	*Date:*	*Revision:*

FEAT-236 **Rendering of history of items more compact**	Wolfgang Huber	2018/01/31 10:55:39	2

Product Changes / Release 2.0 / Improvements / Rendering of history of items more compact

Downlinks:

- **SPEC-14** **History Tool**

Description

If there are too many revisions of an item, the history dialog can become too crowded.

In this case the history dialog renders only the last change of each day with a date, the others as empty riders, e.g. it will look like this:

FEAT-237 **Smart link context page improvements**	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/31 13:32:44	2

Product Changes / Release 2.0 / Improvements / Smart link context page improvements

Downlinks:

- **SPEC-94** **Context Pages**

Description

When enabling the smart link context page, the source of smart links is shown underneath the item.

Also, smart links used in documents sections are shown.

FEAT-238 Table Columns can be defined to use project wide drop down definitions	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/31 13:41:40	4

Product Changes / Release 2.0 / Improvements / Table Columns can be defined to use project wide drop down definitions

Downlinks:

- **SPEC-116** Table Control (steplist)

Description

Instead of defining the drop down options in the table definition itself, they can be taken from a project setting, defining the drop down options.

```
"columns":[
 {
  "name":"Column 4",
  "field":"column4",
  "editor":"select",
  "options":{
    "setting":"dropdown_config"
  }
},
```

| **FEAT-256** In reference dialog do not show always all XTC	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/31 14:19:08	2

Product Changes / Release 2.0 / Improvements / In reference dialog do not show always all XTC

Downlinks:

- **SPEC-34** **Reference Icons and Dialog**

Description

Instead of showing all XTCs the UI shows the first and last XTC and a placeholder in between if there are more than 3 XTCs for a TC. Clicking on the placeholder element will show the rest of the XTCs.
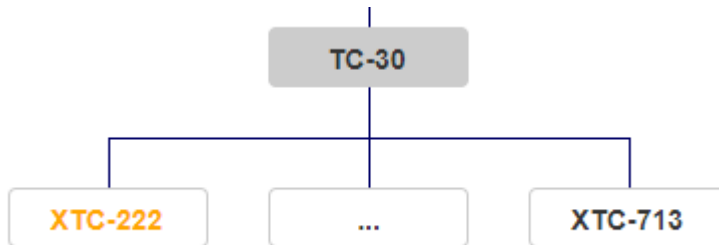
FEAT-257 **Keep tree expanded when clearing search**	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/31 16:05:13	4

Product Changes / Release 2.0 / Improvements / Keep tree expanded when clearing search

Downlinks:

- **SPEC-40** **Searching**

Description

When searching using the "hide mismatches and expand tree" the tree now remembers the expanded state when the search is cleared.

FEAT-259 **Expose all display options of labels in UI**	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/31 16:48:11	2

Product Changes / Release 2.0 / Improvements / Expose all display options of labels in UI

Downlinks:

- **SPEC-68** **Labels definition**

Description

In the admin client it is now possible to configure text, colors of labels and filters for each different state.

FEAT-214 **Design review label can have a signature box**	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/31 16:55:02	6

Product Changes / Release 2.0 / Improvements / Design review label can have a signature box

Downlinks:
- **SPEC-90 Design Review Workflows**

Description

Design review labels can be configured in such a way that the reviewer needs enter his password to set the label.

FEAT-260 **Add setting to allow to clear date fields**	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/01/31 17:02:01	2

Product Changes / Release 2.0 / Improvements / Add setting to allow to clear date fields

Downlinks:
- **SPEC-154 Date Select Control (date)**

Description

FEAT-266 **Context pages more intuitive to show / hide**	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 12:46:44	3

Product Changes / Release 2.0 / Improvements / Context pages more intuitive to show / hide

Downlinks:
- **SPEC-94 Context Pages**

Description

Before you had to click on the question mark to toggle the context pages, now this can be done through the user menu / a close button in the frame itself.

FEAT-258 **Added possibility to delete issue types in JIRA/Github plugins**	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 16:54:06	3

Product Changes / Release 2.0 / Improvements / Added possibility to delete issue types in JIRA/Github plugins

Downlinks:

- **SPEC-42** **Jira Integration**

Description

Before it was only possible through advanced settings.

FEAT-267 **Risk multi-line text input improvements**	**Author:**	**Date:**		**Revision:**
	Wolfgang Huber	2018/02/03 20:37:11		2

Product Changes / Release 2.0 / Improvements / Risk multi-line text input improvements

Downlinks:
- **SPEC-141** **Risk Configuration**

Description

The height of the multi-line text input is adjusted to content when loading a risk.

FEAT-160 **DOC number macros**	**Author:**	**Date:**		**Revision:**
	Wolfgang Huber	2018/02/11 09:52:39		14

Product Changes / Release 2.0 / Improvements / DOC number macros

Downlinks:
- **SPEC-196** **Document Ids**

Description

Macros can be used in DOCUMENT NUMBER field, e.g.

DOC-1 SW Dev Plan

◢ DOCUMENT NUMBER

PLAN-_YY_-_serial4_-_title_

will be used to define the title of generated SIGN items:

PREVIOUSLY CREATED SIGNED DOCUMENTS
- **SIGN-3** PLAN-18-0001-SW Dev Plan

The following macros exist:

macro	when creating SIGNed the document title will be replaced by
_id_	the id of the document, e.g. DOC-13
serial	replaces the document's number by the number with up to 3 leading 0s, e.g. the serial of DOC-13 -> will be 013
serial1 _serial2_, _serial3_, _serial4_	padding with 1, 2, 3 (same a _serial_) , 4 leading zeros
project	id of project
title	title of document
YYYY	year (of day of SIGN creation), e.g. 2017
_YY_	year after 2000, e.g. 17
_MM_	month, e.g. 05
_DD_	day, e.g. 03
YYYYMMDD	year, month and day, e.g. 20170214

BUG FIXES

FEAT-217 Checkboxes in docs were not rendered nicely ind DOCX/PDF	Author:	Date:	Revision:
	Wolfgang Huber	2018/02/01 12:50:56	4

Product Changes / Release 2.0 / Bug Fixes / Checkboxes in docs were not rendered nicely ind DOCX/PDF

Downlinks:
- **SPEC-159** Checkbox Control (checkbox)

Description

Multiple checkboxes following each other did not render nicely one underneath other.

FEAT-218 Click-n-drag a word document in a rich text when creating an item did not work well	Author:	Date:	Revision:
	Wolfgang Huber	2018/02/01 12:48:55	5

Product Changes / Release 2.0 / Bug Fixes / Click-n-drag a word document in a rich text when creating an item did not work well

Downlinks:
- **SPEC-113 Drag and drop of word in richtext**

Description

There was a confirmation appearing behind the create item dialog.

FEAT-216 Reset to XTC overall result to automatic did not work as expected	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 13:15:35	4

Product Changes / Release 2.0 / Bug Fixes / Reset to XTC overall result to automatic did not work as expected

Downlinks:
- **SPEC-46 Test Definition and Test Runs**

Description

Have a XTC with test result automatic
- set some test results and save ->test result will be automatic - in progress or something
- set test result to passed and save -> test result will be passed
- set test result to automatic and save -> test result will empty but it should be same as before

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FEAT-220 It was possible to upload PDF files as signature images	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 13:16:44	3

Product Changes / Release 2.0 / Bug Fixes / It was possible to upload PDF files as signature images

Downlinks:
- **SPEC-54 Electronic Signatures - Signing**

Description

These than did not appear in printouts.

FEAT-222 It was not possible to create a smart link to item if it has no siblings	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 14:32:17	2

Product Changes / Release 2.0 / Bug Fixes / It was not possible to create a smart link to item if it has no siblings

Downlinks:

- **SPEC-79** Smart Text

Description

If an item was the only child in a folder the UI did not allow to select it without selecting the parent folder

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FEAT-225 Risk report with 'recursive risks' crashed	Author:	Date:	Revision:
	Wolfgang Huber	2018/02/01 14:39:02	2

Product Changes / Release 2.0 / Bug Fixes / Risk report with 'recursive risks' crashed

Downlinks:

- **SPEC-27** Risk Analysis Reports Content

Description

If an item linked to a risk and the risk control was the same item, the risk report could not be created successfully.

FEAT-227 Checkboxes - did not show up correctly in history	Author:	Date:	Revision:
	Wolfgang Huber	2018/02/01 14:55:37	2

Product Changes / Release 2.0 / Bug Fixes / Checkboxes - did not show up correctly in history

Downlinks:

- **SPEC-159** Checkbox Control (checkbox)

Description

FEAT-228 Test with manual test results selection might not have shown up correctly in test statistics	Author:	Date:	Revision:
	Wolfgang Huber	2018/02/01 15:02:08	2

Product Changes / Release 2.0 / Bug Fixes / Test with manual test results selection might not have shown up correctly in test statistics

Downlinks:

- **SPEC-164** Test Result Summary (test_result)

Description

Depending on the test configuration, some test results might not have been counted correctly.

FEAT-239 Error message when changing tabs confusing	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 15:05:37	2

Product Changes / Release 2.0 / Bug Fixes / Error message when changing tabs confusing

Downlinks:
- **SPEC-195 Admin client - general**

Description

If a setting needs saving, the error message given when trying to change tabs, was not clear.

FEAT-240 Cross links to single items were not possible	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 15:33:51	2

Product Changes / Release 2.0 / Bug Fixes / Cross links to single items were not possible

Downlinks:
- **SPEC-157 Cross Project Link Control (crosslinks)**

Description

If a folder had only one item inside it was impossible to select it. It would always select the parent folder.

FEAT-244 Dialog with the reason for change appeared behind the creation form	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 15:36:50	2

Product Changes / Release 2.0 / Bug Fixes / Dialog with the reason for change appeared behind the creation form

Downlinks:
- **SPEC-18 Folders**

Description

When trying to create a new folder without a session comment active, the reason dialog was behind the create dialog.

FEAT-262 History of drop down field showed id not value	*Author:*	*Date:*	*Revision:*
	Wolfgang Huber	2018/02/01 17:44:15	2

Product Changes / Release 2.0 / Bug Fixes / History of drop down field showed id not value

Downlinks:
- **SPEC-155 Drop Down Control (dropdown)**

Description

FEAT-269 MRQL: Looking for "not filter" did not work	*Author:*	*Date:*	*Revision:*
	Yves Berquin	2018/02/10 12:51:21	1

Product Changes / Release 2.0 / Bug Fixes / MRQL: Looking for "not filter" did not work

Downlinks:
- **SPEC-93 MRQL; Matrix Requirements Query Language**

Description

The following MRQL expression:

mrql:label != Software

did not work correctly: items that never had a label were not found by this query

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FEAT-273 Importing a project with audit may miss fields	*Author:*	*Date:*	*Revision:*
	Yves Berquin	2018/03/30 10:12:43	3

Product Changes / Release 2.0 / Bug Fixes / Importing a project with audit may miss fields

Downlinks:
- **SPEC-30 Project Reports Content**

Description

If the last operation on an item, before the project is exported with audit, was to move it to another folder, then the projects re-created from that export will miss their fields. Only the title of the item and the labels will be restored.

(Thanks Nele for reporting this)

FEAT-274 Subsection 7 and 8 of the risk analysis in the DOC are the same	*Author:*	*Date:*	*Revision:*
	Yves Berquin	2018/03/30 10:12:31	2

Product Changes / Release 2.0 / Bug Fixes / Subsection 7 and 8 of the risk analysis in the DOC are the same

Downlinks:
- **SPEC-110 Risk Analysis Section**

Description

There is a Risk Analysis section that can be added to the controlled documents. It contains a list of subsections.
Subsection 8 (Risks by zone before control) wrongly generate the same list as Subsection 7 (Risks by zone after control)
(Thanks Bob for reporting this)

FEAT-275 Part of the screen disappears when pressing frequently on Ctrl-A Ctrl-C	*Author:*	*Date:*	*Revision:*
	Yves Berquin	2018/03/30 10:10:03	1

Product Changes / Release 2.0 / Bug Fixes / Part of the screen disappears when pressing frequently on Ctrl-A Ctrl-C

Downlinks:

- **SPEC-115** Downlinks (links)

Description

If you click frequently on Ctrl-A and Ctrl-C (or ⌘-A and ⌘-C on a Mac) the UI may get erased : the tree on the left disappears as well as the upper banner
(Thanks Gil for reporting this)

KNOWN ISSUES

- MATRIX-2073 Drag and drop does not work in Edge (Issue of Edge)

Workaround: use another browser if important (until MS fixes Edge)

- MATRIX-2408 Risk table in word docs might not fit the page (Issue of Word, ok for PDF)

Workaround: create PDF or in Word, select table and select fit to page

- MATRIX-2409 Macro for a date in the title does not work correctly

Workaround: instead of using combined macro for date month day, use macros for each individually

- MATRIX-2411 Smart links are not generated in some table sections in documents

Workaround: use smart links in rich text boxes if the links are important

SIGNATURES

Signature Meaning	Name	Title	Date	Signature
Approved By	Wolfgang Huber	CEO	2018/03/31	**sign-p14-i42236-b20180331091600023**
Approved By	Yves Berquin	CEO	2018/03/31	**sign-p14-i42236-b20180331091425430**