Castor EDC 2020.2 release notes

Main features & improvements

Monitoring Overview

- Filters in the monitoring views have been placed to the side and are hidden by default, which gives more width to the overview tables.

Signature

- In the study settings it's now possible to set up a signature statement. This statement is presented to the user when applying a signature. By signing the phase or step, the user declares what is written in the signature. After the study has gone live, it is no longer possible to edit the signature.
- Users are now asked to provide email and password the first time they sign a step or phase during their session. After the first signature, only password is required.
- Signatures are now visible on the steps when printing a record.
- The option to unsign a phase/step has been added to the phase/step options.

Records overview

- The Queries column now shows the total amount of un-closed queries on the record
- New filters have been added to the overview. The system now also allows for filtering:
  - Locked status
  - Missing SDV: Filters to only show records that have collected data (excluding reports), that has not been Source Data Verified.

Queries

- New filters allow for filtering on query creation date and query location.
- In the overview, the option has been added to go directly to the query in data entry.
- The 'Field label' column in the queries overview has been replaced with a column 'Location'. This column indicates the phase, step and field the query is on.
- The query overview no longer displays queries on phases or steps that are hidden for the user's role.
- The query overview no longer displays queries on phases or steps that require encrypt or decrypt rights, if the user does not have these rights.

Source Data Verification (SDV)

- SDV has been separated from other types of (custom) verifications.
- Field level SDV:
  - It's now possible to apply SDV per field. An icon next to the field options indicates when SDV is applied.
  - When SDV is applied to all required fields in a step, the step will also be marked as SDV'd.
  - The functionality is available in Study and Report forms
- Step level SDV:
  - New SDV options are added to the step menu. The different options for applying SDV to a step are: SDV all required fields, SDV all fields, SDV step only (no fields)
  - When SDV is applied to a step, a new option is displayed to remove all SDV on the step and its fields.
  - SDV can no longer be applied multiple times to the same step. (which in practice was almost never done)
  - SDV on fields and steps is now dropped when new data is imported for the relevant field/step.
  - A new dialog has been added to inform users in case of incomplete fields when applying SDV to a step or field. A field can be incomplete because of open queries or no data has been entered.

Bug fixes & minor improvements

- The option to set the user role back to 'None' has been added to the user rights dialog.
- New fields have been added to the study settings for more information on study sponsor, industry, type, funder, study category, approval and therapeutic area.
- The width of the record id column in the records overview by phases and steps is now adjustable.
- Steps and phases that are hidden by an automation are no longer clickable in the records overview by phases and steps.
- When entering an invalid year in data entry, the system now displays a system validation message below the field instead of an error dialog.
- When filling in only the date part of a not required Number and Date field, a warning message would be displayed. This warning message has been removed and the date is now saved.
- When importing a wrong formatted datetime in a date and time field, the record importer would show an error message with a generic error message. The importer now shows a warning message for the specific field and allows for importing the rest of the data.
- When importing a report with an incorrect or non existing parent, the system now displays a warning message to the user indicating that the parent does not exist and the report will be created without the parent.
- It is now possible to import cyrillic text in the data importer.
- Slider field values are no longer exported with additional decimals when the slider does not allow for that.
- The random string at the end of a data export file has been replaced with the date and time of the export.

- Metadata has been renamed to Annotations throughout the system (excluding the API)
- Metadata/Annotation descriptions are no longer required.
- The audit trail filter on event type has been cleaned from old events that were no longer triggered.
- User missing and field value cleared events in the field level audit trail have been updated to work for grid fields and option group fields.
- Surveys that were created with a survey button in data entry were not attached to the phase/report that the button was on. This has been fixed.
- Hyphens are now allowed in email addresses when sending survey invitations.
- The copy step behaviour has been changed to also allow a suffix starting with a number.
- Copying a step no longer requires a step description.
- When filters for overview tables are closed, the table now fully expands for easier navigation.
- New studies with the country of the institute set to Zambia or Zimbabwe could not be created. This has been fixed.
- When creating a new study without specifying the study type, there was no message indicating that study type is required. This is now clearly indicated on the field.
- Setting a large phase or step to user missing no longer fails and a lloading screen has been added to provide feedback to the user and not let users perform the action multiple times.
- Survey packages could be saved without the {url} tag, leading to invitations not containing a survey url. The {url} tag is now mandatory again.
- When creating a record in the records overview by phases or steps, the record did not open directly. This has been fixed.
- Custom record id patterns with a slash did not work correctly and prevented the user from creating a record id with a slash. This has been fixed.
- The multiline text field in data entry has been updated, fixing problems with the text field overlapping with other fields when typing a large text in survey data entry.
- For studies with a large number of records, the statistics tab did not load properly. This has been fixed.
- Large dropdowns in report data entry were sometimes hidden behind the report title. This has been fixed.
- Option groups options with a label and value of 0 were not saved correctly when creating an option group. This has been fixed.
- Importing option groups with a csv now also accepts options with apostrophes.
- In the structure export, option group references within the field have been removed from the XML. For the import, these were not used and increase the size of the XML.
- Uploaded files for records which contained a plus (+) sign in the record id could not be downloaded. This has been fixed.
- When a step is verified or signed on a study that does not have monitoring enabled, the confirm changes popup when changing a field value would show up infinitely after confirming changes. This has been fixed.

- The reports overview filter 'Filter by institute' only displayed institutes where the had 'Add' rights for, this is fixed and now displays all institutes that the user has 'View' rights for.

- It is now possible to archive reports from a repeated measures field for uses with only archive rights.

- Empty repeated measures reports (that were triggered by an automation), no longer show up in repeated measurements grids.

- In Internet Explorer, the label of a query could overlap with other data in the query dialog. This has been fixed.

- When a user was invited to a study with a register link, not all characters were allowed in the registration page, leading to an invited user not being able to register. This has been fixed.

- Security fixes for survey and survey package structures.

- In some cases when users manually copy urls and not copy the entire url (missing |tab), it would show a blank page. This is now redirected to the records overview of the study.