



PolicyHub: Release Notice

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PolicyHub Version 5.1.0. Release Notice

This is a General Release of PolicyHub following enhancements and improvements to the software.

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Changes in this Release

PolicyHub Enhancements

PH 5928, PH-5930, PH-5932, PH-5977, PH-6464	Performance enhancements to run reports faster from a standard database size.
PH-3279, PH-7113	PolicyHub now uses the same licence configuration as DataStore DSX.
PH-3404	This release of PolicyHub supports Login Intercept on Windows 8 and Windows 10.
PH-4188	Added a new feature to enable existing <i>Workflow Design</i> to be copied and reused.
PH-4779 PH-7528	This release of PolicyHub supports SQL Server 2016 and SQL Server 2017.
PH-5597, PH-3566	It is now possible to retract or recall from an individual user rather than a group.
PH-5855	PolicyHub now has the ability to filter our retraction statuses for individual users from all of the reports.
PH-5938	This release of PolicyHub now supports ADFS 3.0 and ADFS 4.0 in addition to ADFS 2.0.
PH-5957	This release of PolicyHub supports .NET Framework 4.6.2.
PH-5965	Performance enhancement to increase the handling ability for large numbers of publications.
PH-6125, PH-4778	This release of PolicyHub supports Windows Server 2016.
PH-6644, PH-5905	<p>Policy templates are a new concept in PolicyHub that give compliance professionals, control of how policies are generated. A template can be defined and enforced for a policy <i>Category</i>, meaning that any new policies added to the library have to be based on the configured template. Templates themselves can be controlled by their own <i>Review and Approval Workflows</i> to ensure that content is correct and signed off before any policies are even generated. Templates can be stored alongside policies or in a separate area of the library.</p> <p>Policy Templates are also a really useful feature when generating less critical policies. The user can build up a library of common templates and choose which one to use as a starting point when generating new policies. This also means that policies can be authored completely within PolicyHub, instead of having to create them in Word and then then upload them afterwards.</p> <p>Please note: Due to limitations within Microsoft Word, documents cannot be compared or merged if they contain locked regions.</p>

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- PH-6847 PolicyHub now has the ability to integrate with a HR system and can display your organisational hierarchy within the *Users* and *Groups* screen. *Users* are able to generate Compliance Overview reports on this structure to audit compliance for specific line managers and both their direct reports and everyone else that falls under them. Publishers can now configure manager escalation emails that will notify managers of any policies that their direct reports have not yet attested to. The scheduling of these emails is completely customisable, as is the inclusion of specific publications. Specific managers can also be excluded in cases where these emails are not appropriate. This set of features enables publishers to truly delegate the responsibility of compliance to line managers to ease the burden of compliance for larger organisations.
- PH-6848 Introduction of a new pane titled *System Settings* to control *Manager Escalation Emails*.
- PH-7351 It is now possible to exclude publications that were sent direct to the users' library from The *User Compliance Overview* report.

Inbox Enhancements

- PH-5166 PolicyHub Inbox now supports Romanian, Czech and Polish languages.

Error Corrections

PolicyHub Alterations

- PH-1562 The document review status for a user is now shown for all documents in the review instead of only the documents that they have reviewed.
- PH-3273 Correction to stop the Active Directory synchronisation process from failing when there are recursive structures within the Active Directory groups.
- PH-4926,
PH-4615,
PH-4618 Improvements to the time required to import or create a customer database.
- PH-4935,
dev-21358 Added support for apostrophes in email addresses for login purposes.
- PH-5088 Correction to review notification settings so that the chosen notification start time remains the same regardless of daylight saving adjustments.
- PH-5976 Previously a JavaScript error was triggered in Internet Explorer 11 when comments were reviewed in a Word document with track changes locked.
- PH-6205 Changes to the AD sync code to process administrator membership batches more efficiently.
- PH-6378 A *User Action* report no longer shows a status of *Expired* if a publication had previously been *Retracted*.
- PH-6929 Previously, when a publication had been complied with and then viewed in *My Library* by a PolicyHub Administrator, if the F5 key (refresh) was selected a JavaScript error occurred.
- PH-6967 User Interface performance has been improved when producing the *Organization Compliance* report.

PH-7097 In Chrome when performing a review from within the Admin Website (and accessing the Inbox from there) a document that was published with *Request Feedback* downloaded rather than opened for edit or review.

PH-7174 Previously when more than one publication had a delayed publish time set in the future and one of the publications had a recipient list without any users all the publications became impeded.

Publishing

PH-3135 Improvement so the system does not time out when viewing high volumes of retracted publications.

PH-3975 Previously when a document revision was published to previous recipients, it was not possible to see the recipients populated in the *Build New Publication* page.

PH-4135 When adding documents to an existing publication, the new documents are now appended to the bottom of the list and not the top.

PH-4388 Modification to *Configure Notification* review schedule time settings so that it does not increment by one hour when selecting the *Save and Close* button.

PH-4390 A user cannot delete a recipients list if a participant or owner is assigned to a *Category*. A validation message has now been incorporated if a user tries to delete the recipient list.

PH-4829 When a *Publish direct to the users' library* publication is subsequently retracted, a user can no longer view the publication from the link in the email notification.

PH-5484 When adding documents from the publishing screen in Chrome, right clicking any document and selecting *View active revision*, neither the *Download* nor *Cancel* buttons in the validation message would function correctly.

PH-5652, PH-7265 Text changed in message header from *Retract* to *Re-send* for *Re-send to non-complied users*.

PH-5671 *Edit latest revision* dialog. Correction to the *Cancel* button to improve its appearance.

PH-5895 *Publish* and *Request feedback* options are no longer displayed on the context menu for *Questionnaires* or *Tests* when a user does not have the correct permissions.

PH-6025 Correction so that a *Publication* date and time in the list grid no longer appear incorrectly.

Permissions

PH-5915 Correction to a *Library* folder with multiple library items so that menu options are no longer available when you multi-select.

Reporting

PH-3753 Subscription permissions on *Roles* correctly restrict access as expected.

PH-3831 The default report export file format for Excel has been changed to .xlsx as the .xls format was limited to 65,535 rows.

PH-3864 It is now possible to delete incomplete subscriptions in reports.

PH-6111 When applying a new filter to the *User Action* report and selecting the *Update results* button a JavaScript error no longer displays.

PH-6313 PolicyHub no longer displays *Failed test* if a user role has no reporting write permission.

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- PH-6579 The first column header is now displayed correctly when subscribing to a report with CSV as a file attachment.
- PH-6912 Improvement with *Retry errors* in the *User Action* report.
- PH-6991 It is now possible to select the attachment format from the drop-down list (PDF, Word, etc.) when updating a subscription to save changes made to an existing subscription.
- PH-7438 When a subscription to a *Feedback Summary* report is generated, a new file name is incremented and the older reports are no longer overwritten.

Roles

- PH-3996 Existing users in a role are no longer unassigned when the role is renamed.
- PH-4746 A user prompt is now displayed when renaming a role and moving elsewhere before completing the action.
- PH-5761 Changes to assigned *Roles* have been verified that they save correctly.
- PH-6422 The value for the *Added by* column has been verified and displays correctly in the *Feedback Summary* report.

Rules

- PH-5919 A user with read only access for *Rule* settings can now view all properties of a rule.

Library

- PH-4079 It is now possible to add a description to all library items in the library view where there is a lengthy list.
- PH-4653 Saved review documents no longer expire after an hour of editing them.
- PH-4654 Review comments are no longer visible when editing the latest revision of the same document in the library.
- PH-4676 Removal of a closing bracket at the end of a sentence when editing a revision.
- PH-4685 If a new revision is created during a feedback request, then the approval status should now be set to *Approved* if there is no enforced workflow.
- PH-4973 An entry is now displayed in the *View Retractions* screen when recalling or retracting a *Feedback Request* in the library.
- PH-5061 *Test* - The save button is now disabled after a selection is made once and only becomes active again if a change is made when an answer is removed from a date input question.
- PH-5086 When a folder is moved into another folder that is not in view, the *Library's* right click context menu is now selectable.
- PH-5533 The *Library* right click context menu displays the correct options after assigning or removing a *Category*.
- PH-5583 The correct version number is now shown when viewing a search result from the Inbox after a new revision has been published to the user.
- PH-5751 When creating a new document the *Save Changes* button has been changed to *Save*.
- PH-5783 When comparing two revisions which are different file types a user dialog now displays with the appropriate text prompt.

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- PH-5882 In *Request Feedback*, if a user submits deletions or changes with *Track Changes* turned on, the changes now display when comparing revisions in the Admin Website.
- PH-5966, PH-5982 It is now possible to compare .doc and .docx file types.
- PH-6421 In the *View Retractions* screen an entry is now displayed in the *Retracted documents* for the user who had the document retracted.
- PH-6970 When changing a pdf revision the description no longer displays unwanted numbers and saves correctly.
- PH-7096 The *Next Review* dates in the *Library* column now sorts in the expected order.
- PH-7430 The *Non-recipients* tab in the *Publications list* displays all users that have not received the selected publication.

Localisation

- PH-4781 *Revision* has now been translated into regional languages.
- PH-4783 The *Date* selections now appear in a countries own format.
- PH-4789, PH-4804 The *Cancel* button icon tooltip displays correctly in the associated countries format.
- PH-4836 Users can now discard *Workflow* changes when viewing the Inbox in Turkish.
- PH-4837 The *Cancel* text in German now fits the button when discarding document changes.
- PH-5144, PH-5162 Modification so that regional language characters in email addresses no longer cause sending errors.
- PH-5464 Chinese correction to translation of *Browse* on a mouse tool tip.
- PH-6254 *General Library Item* report - language translation changes.

Categories

- PH-4552 Fields are no longer active in *Categories* when a user only has read category management permissions.
- PH-5472 In *Category* management all fields return to a non-editable state when the *Discard* change button is selected.
- PH-6844 Permissions update immediately when a *Category* is changed.
- PH-7431 Change to *Categories* dialog box.

Reviews

- PH-5035 Adjustment to the *Review Document* screen in the *Date comments submitted* column so that it calculates the time zone.

Workflow

- PH-4587 When an active design is in a non-editable view design menu options are no longer available.
- PH-4749 It is no longer possible to start a *Workflow* with *Library* read only permissions.

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- PH-5571 The *Start Workflow* option is now displayed in the menu with *Library* read only permissions.
- PH-5577 It is no longer possible to *Start Workflow* for documents using the multi-select option when the documents have a category assigned with an owner other than that user.
- PH-5624 *Review Workflow* - When there are two or more draft, unpublished revisions, if one revision is deleted the remaining revision now remains as draft.
- PH-5698 The *Start Workflow* button and menu option is no longer available when a user doesn't have *Workflows* module write permissions.
- PH-5824 The date is now displayed correctly in a *Workflow Review*.
- PH-5922 The *Create New Workflow* button is no longer available for a user with *Workflow Design* read only permissions.
- PH-5923 A loading icon is no longer visible for a user with *Workflows* read only permissions when selecting the menu option.
- PH-6474 When selecting a non-active *Workflow Design* the correct options are now displayed in the drop down menu.
- PH-6769 In the *View Comments* screen in *Workflows* the time is now displayed together with the date.

Notifications

- PH-6314 Publishers are now provided with an email notification option when users are non-compliant with a publications' rule.

Inbox Alterations

- PH-2360 Correction to the Inbox sub-title.
- PH-3466 *Accept without changes* and *Upload changes* buttons are now available in the Inbox when reviewing a document after a timeout.
- PH-3494 The sub-header for different documents has been amended for German Inbox users.
- PH-3511 Previously a publication could only be retracted from all users' inbox library where at least one user had complied. The publication was showing as *Still in progress* in the users' inbox. The publication now retracts from all users' inbox library without a user needing to comply.
- PH-3862 Performance enhancements when searching the PolicyHub Inbox.
- PH-4613 Users no longer see items sent to a disabled user account with the same login name.
- PH-4801 Display changes to regional languages so they fit within the menu buttons.
- PH-4802 The *Inbox Review History* screen has been translated into various regional languages.
- PH-4805 Enhancement to the appearance of the *View Comments* dialog when a scroll bar is displayed.
- PH-4808 Missing translations have been added on the *Workflow Summary* dialog.
- PH-4817 Enhancement to the appearance of the *View Changes (Read Only)*, *View Changes* and *Edit* dialogs in *Review Document* with certain resolutions.
- PH-4824 The *Review History* button now works correctly when viewing the Inbox in Turkish.

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- PH-4835 Improvement to the display and format in a *Workflow Summary*.
- PH-4862 Adjustment to *View Comments* dialog so that it fits within the display.
- PH-4887 The *Review* button no longer resizes in Chrome after a document is downloaded.
- PH-4930 A JavaScript error is no longer displayed when selecting *Review Document*.
- PH-4976 Retracted compliance publications are no longer visible within *My Library*.
- PH-5023 It is no longer possible to access a policy from a hyperlink after the policy has been retracted.
- PH-5081,
CRM72210 PDFs are now displayed correctly on an iPad.
- PH-5538 When *Publication History* is selected from *My Library* and filters are chosen, the publication list now correctly updates when the filter settings are changed to a different value.
- PH-6415 Multiple *Workflows* in the Inbox with the same *Design* now show *Reasons* on every *Workflow*.
- PH-6561 Chrome could not always view workflow changes from the Inbox when accessing it from within the Administrator Website.
- PH-6846 Tool tip text correction in Inbox for *Publication Name*, *Published On Behalf Of* and *Publication Date*.