User Guide Module 7: Viewing Document or Component Versions and Other Information

For InteliNotion Version: 2024.GR2.0
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1. DOCUMENT AND COMPONENT VERSIONING

Typically, both the document and all its editable components are up-versioned whenever the document is saved to the system during single-user authoring or co-authoring (see details on how to save in Module 5) or following the completion of a collaborative review session (see details in Module 9). In certain instances, however, components may be up-versioned only if a 'true' content change is made within the component; else, a new version is not created. This is referred to as "**conditional up-versioning**" which is a setting that can be turned on or off for each authoring mode (single authoring, co-authoring, and collaborative review).

Note: The conditional up-versioning setting is not available in the IN Web Console; an Azure Cloud engineer must be contacted to implement a change.

When the document is saved in either single authoring or co-authoring (interim save or finish), the following operations performed during authoring **are** considered modifications/content **changes** (so the component would be up-versioned) regardless of the method used to make the changes (such as find/replace, Reviewing Pane, 3rd party add-ins or macros, etc.):

- Content changes made to/within component content controls (with or without Track Changes enabled)
- Formatting changes made directly to/within component content controls (with or without track changes)
- Adding comments, comment replies, or resolving comments
- Accepting/rejecting track changes

The following operations are **not** considered modifications/content **changes** (so the component would not be up-versioned) during either single or co-authoring:

- Global formatting changes such as style and numbering scheme updates at the document level.

After a collaborative review session for a document using PleaseReview is completed, the following operations performed during the review **are** considered modifications/content **changes** (so the component would be up-versioned):

- Content changes made to/within component content controls
- Adding/modifying comments and replies
- Changing comment attributes
- Accepting/rejecting changes in **PleaseReview**

Warning: Turning on conditional up-versioning carries a real risk of content loss as described below. Your configuration must be tested to assess this risk.

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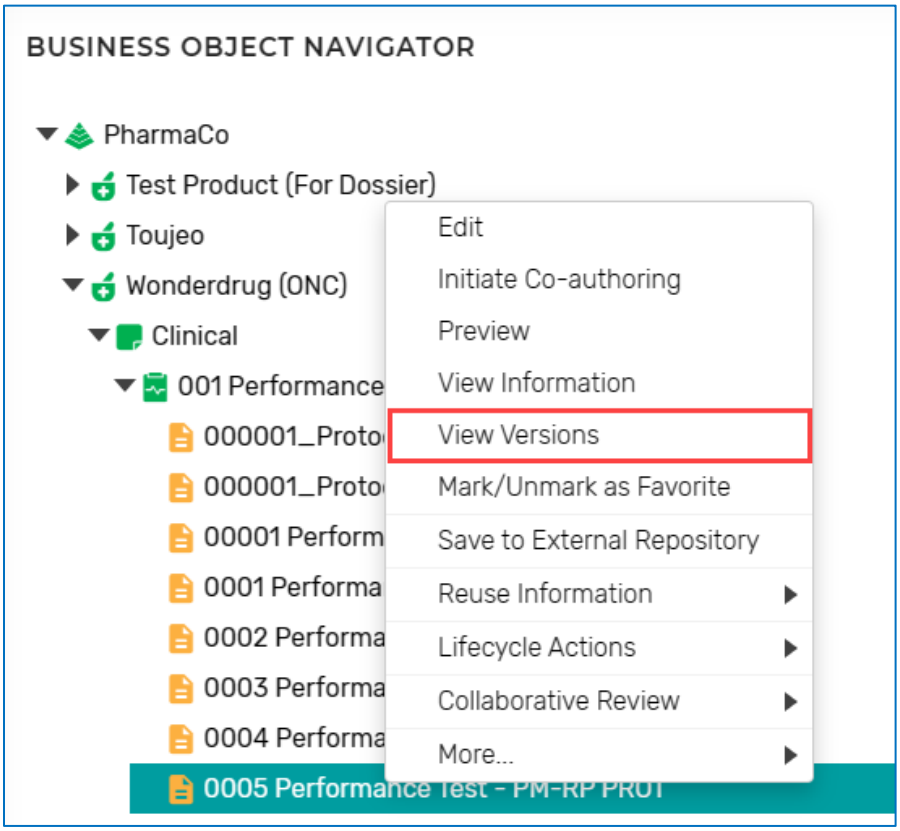
- Any component-level content changes made during single authoring without the IN Word app (being installed and loaded) will be lost.
    - Some component-level edits (eg, accept or reject all changes) made during single authoring may be lost if they are not accompanied by other changes. A list of such known changes will be provided upon request.
- Some or all component-level content changes made during co-authoring (either 'without XML' or 'with XML') while the 'Perform Content Comparison' setting is turned OFF will be lost. For conditional up-versioning to work during co-authoring, this system-level setting (activated by an admin) must be enabled at all times.

1.1 VIEWING AND COMPARING VERSIONS

Any object that has versioning enabled – such as a document or component, but usually includes other objects such as a product or study as well – can have its versions viewed by a user as follows:

1. Right-click on the document/component and click **View Versions**.



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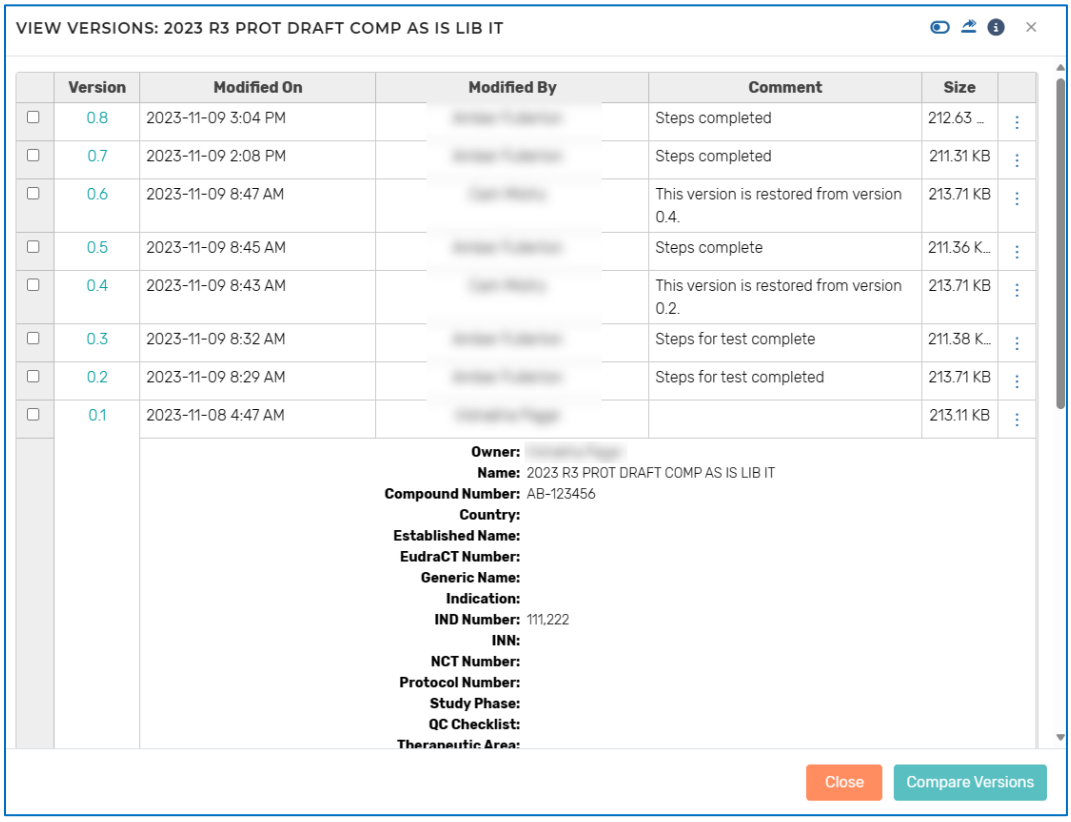
> **Note:** If not accessing the document/component via the **Navigator**, the user can click the **vertical ellipsis** ⋮ to view and click **View Versions**.

2. The **View Versions** pop-up window will appear on the screen:



> **Note:** In the *InteliNotion Word App*, the **Modified By** and **Comment** columns are not displayed in the **View Versions** window. However, that information can be viewed by hovering over the **Modified On** value of that version.

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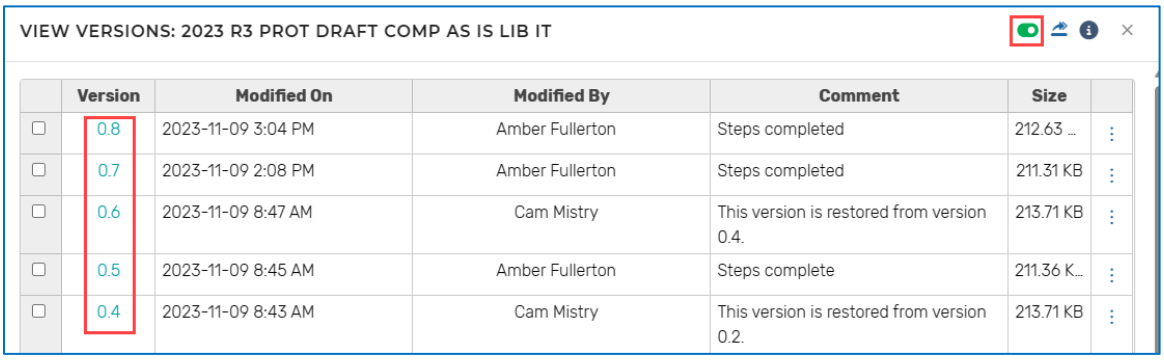
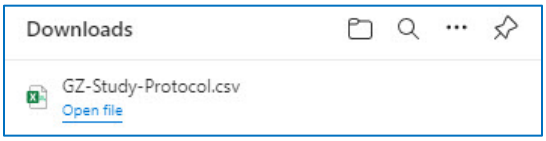
a. To view a condensed **View Versions** screen with only major versions displayed, click the toggle icon at the top right corner of the screen. It will flip to green, and only major versions with the latest unapproved minor versions will be displayed.



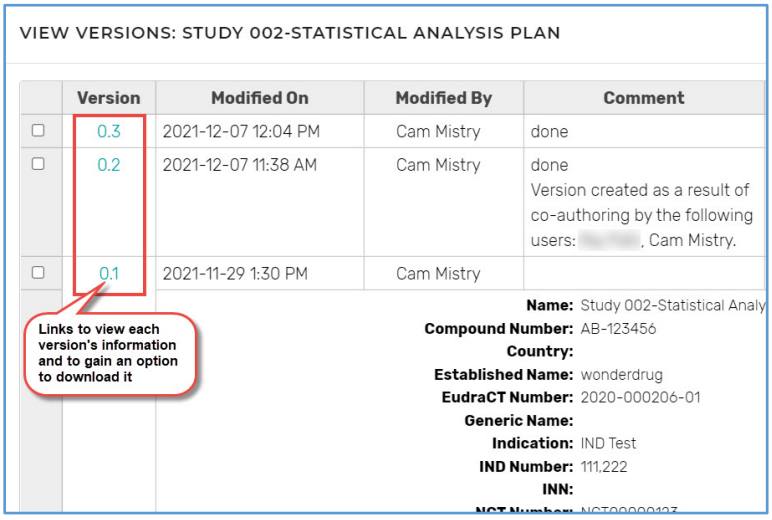
Version	Modified On	Modified By	Comment	Size
0.8	2023-11-09 3:04 PM	Amber Fullerton	Steps completed	212.63 ...
0.7	2023-11-09 2:08 PM	Amber Fullerton	Steps completed	211.31 KB
0.6	2023-11-09 8:47 AM	Cam Mistry	This version is restored from version 0.4.	213.71 KB
0.5	2023-11-09 8:45 AM	Amber Fullerton	Steps complete	211.36 K...
0.4	2023-11-09 8:43 AM	Cam Mistry	This version is restored from version 0.2.	213.71 KB

b. To download the version history in a CSV file, click the icon at the top right of the **View Versions** pop-up.

c. A download window will appear to notify the user has successfully downloaded the CSV file.



3. Click on the relevant version number to view that version's information.



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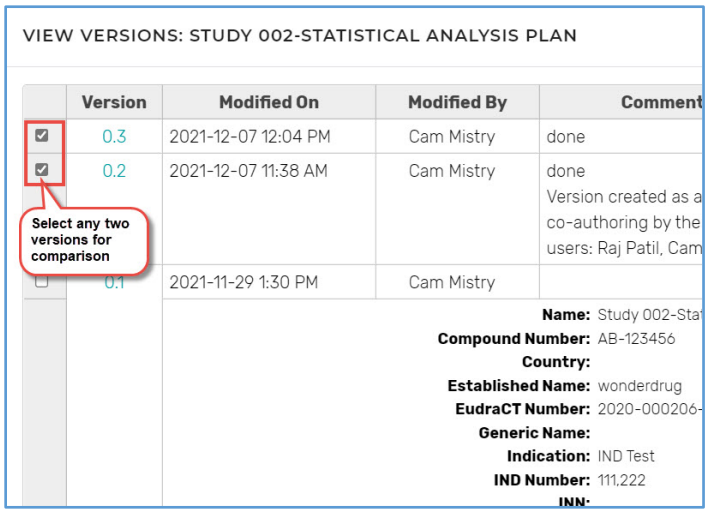
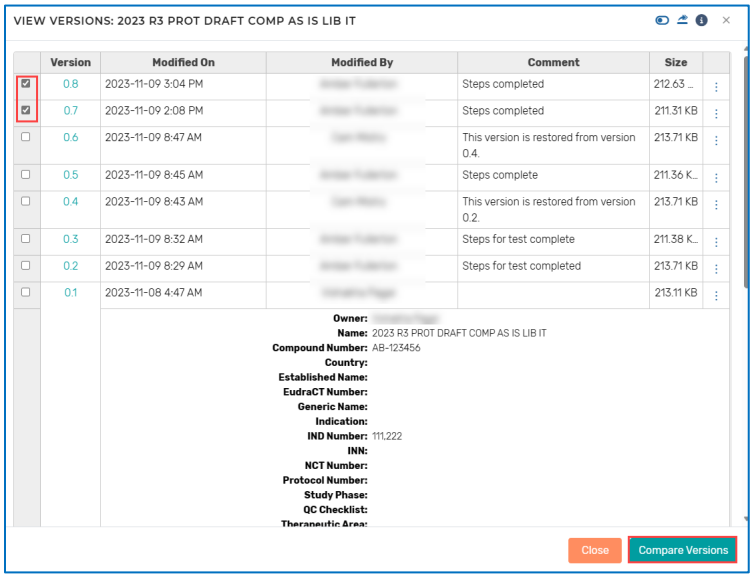
4. To compare versions, select any 2 from the list, at which time the **Compare Versions** button will enable.



Notes:

- ***Only*** 2 versions can be compared at a time.
- Using *MS Word* to compare an *InteliNotion* document with a local copy of the same document will not generate an accurate comparison of the 2 files. Therefore, this is not a suggested action.
- Using a local copy of an *InteliNotion* document in *MS Word* may not reflect the latest/updated values for the variable contained therein.

5. Click **Compare Versions**.



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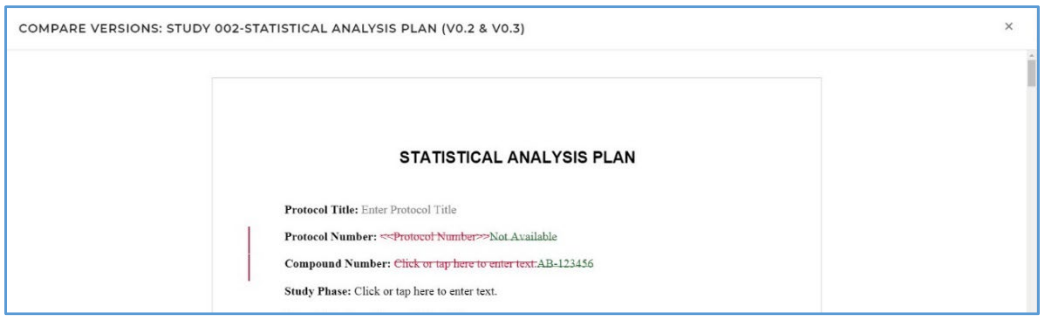
- A comparison of the 2 versions will display in track changes on the screen as follows:
  - Content in red strikeout indicates it is from the earlier version.
  - Content in green indicates it is from the later version.



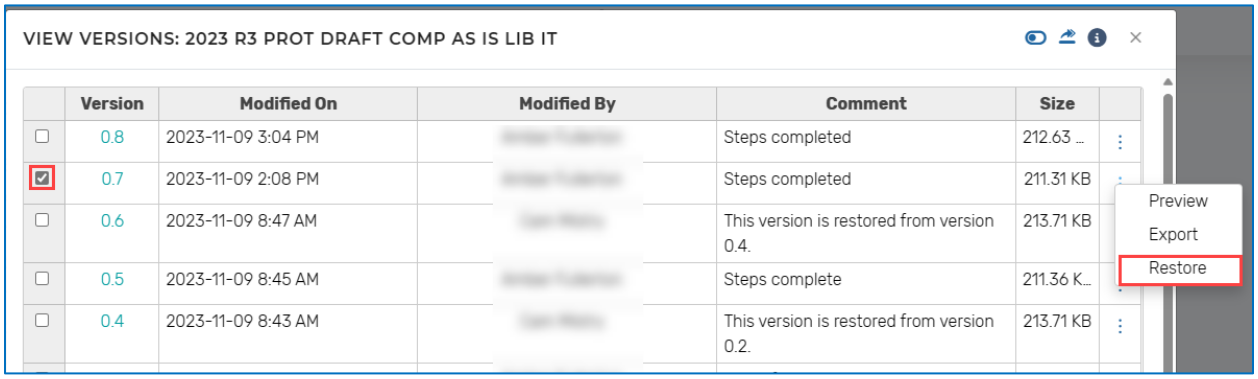
Note: The version comparison may not display any changes if one of the versions being compared included a property/lifecycle state change ***only*** (ie, no content was changed between the selected versions).

1.2 RESTORING A PRIOR VERSION

A previous version of the document or component can be restored and made the current version. If a user chooses to restore a previous version, the restored version will have the previous content, however, a new version number is assigned. For a document/template, when a prior version is restored, the related components will not be auto refreshed to their most updated version, but instead display content as per the version that was associated with the document/template restored version.

Note: While restoring to a prior version, the respective document or component should not be open in *MS Word*.

1. From within the View Versions pop-up window (see above), click the ellipses to the far right and select **Restore**.



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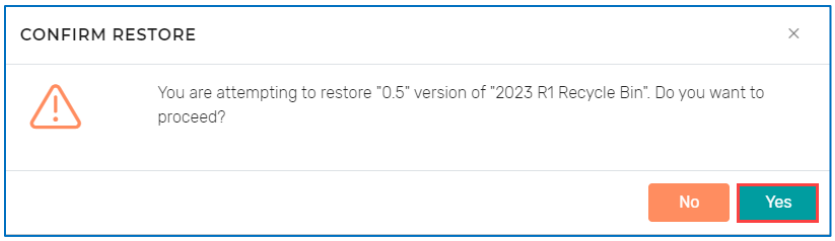
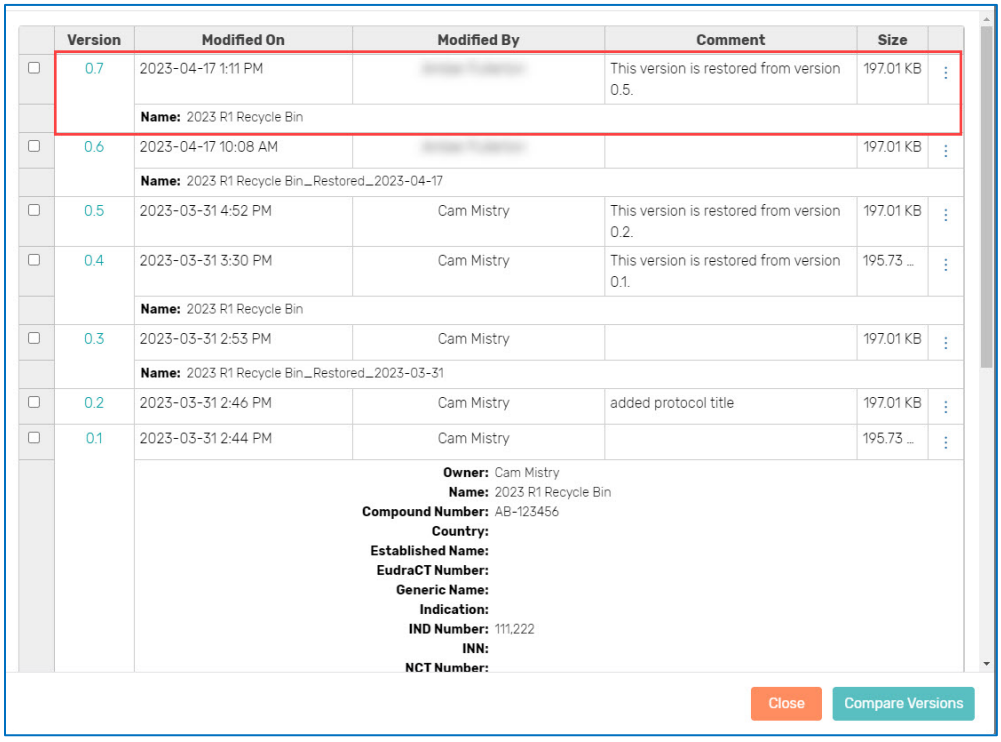
2. Click **Yes** to confirm the restoration of the selected version.



3. The restored version of the document/component will appear at the top of the list since it becomes the last modified version. The restored version also includes a system-generated comment indicating from which version it was created.



Notes:

- When restoring a prior **Approved**, major version (eg, 1.0) of a document/ component, the system creates a new version that is also an **Approved**, major version (eg, 2.0).
- After a document or component (or any object with versioning allowed) is restored its owner property will remain unchanged from the latest owner.

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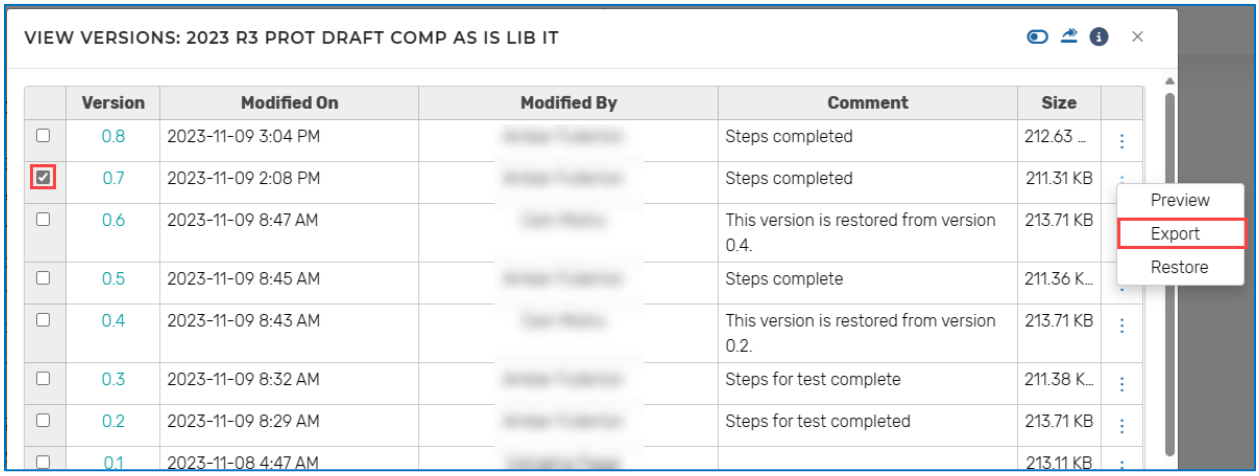
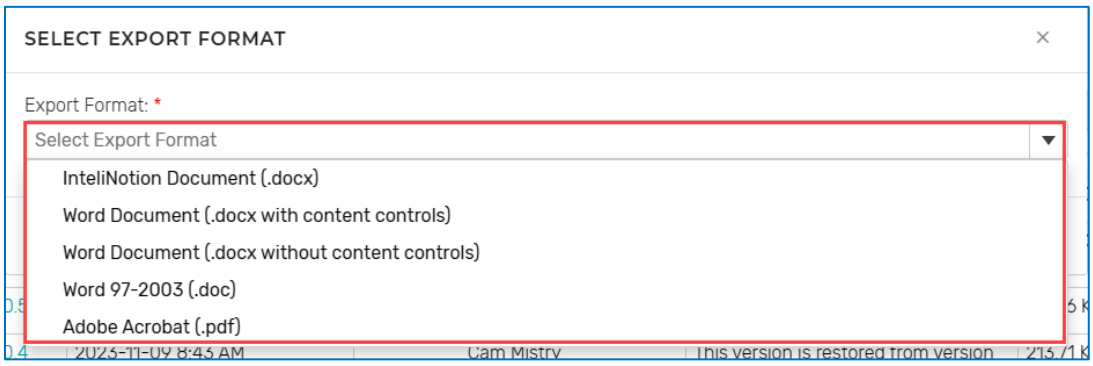
1.3 DOWNLOADING A CURRENT OR PRIOR VERSION

To download a version of a document, follow the steps listed below.

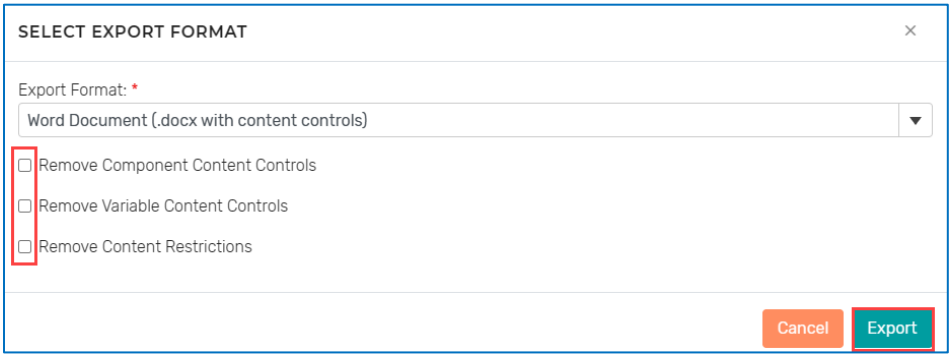
1. In the View Versions display, navigate to the version to be downloaded. Click the ellipses to the right of the appliable version and click **Export**.



2. A pop-up will display with all possible formats available for download. Choose the desired format from the drop-down menu.



3. Check the checkboxes for the desired export configurations and click **Export**.



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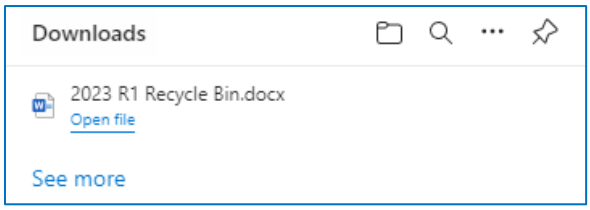
4. A copy of the document will be downloaded to the user's configured folder location.

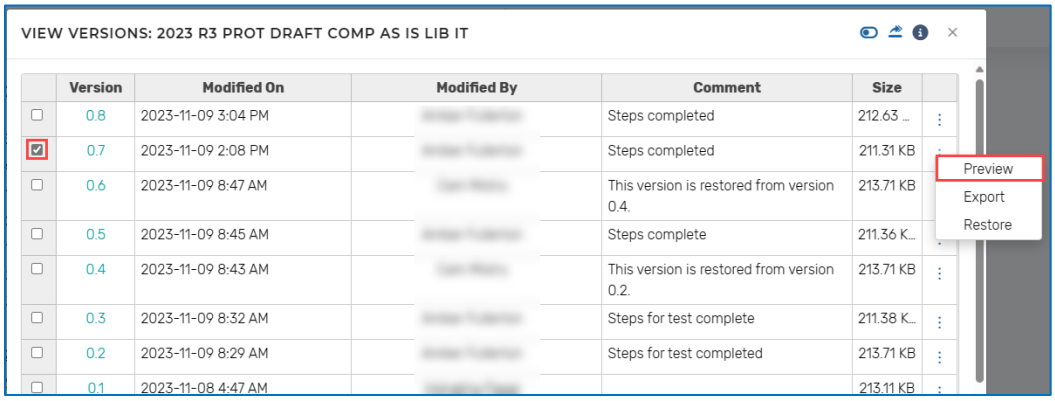


Note: Exports done from the version history page will have the version number appended to the downloaded file (eg TestStudy_CSR_v0.2).

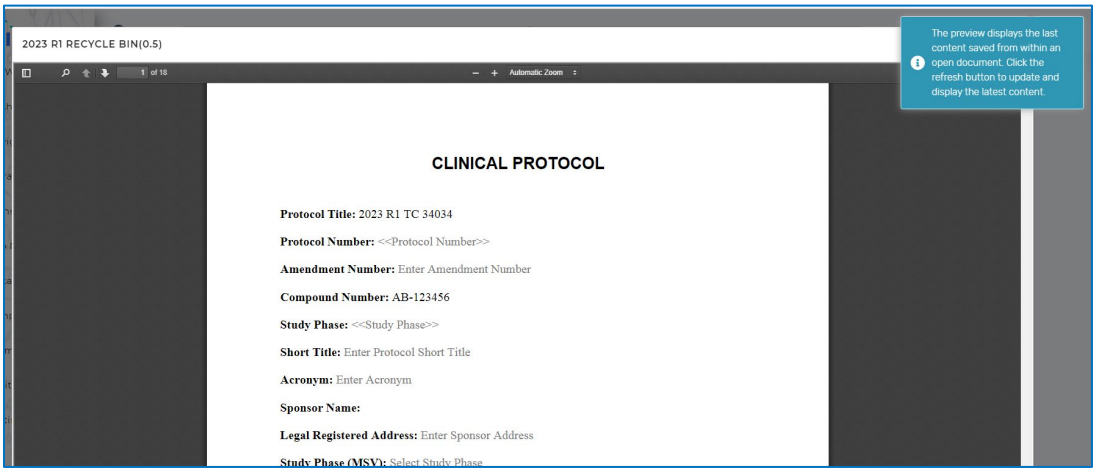
1.4 PREVIEWING A CURRENT OR PREVIOUS VERSION

To preview a current or previous version of a document, follow the steps listed below.

1. In the View Versions display, navigate to the version to be previewed. Click the ellipses to the right of the appliable version and click **Preview**.



2. A preview window of the applicable version will display. To view the most recent version of the document, click the refresh icon at the top right of the preview window.



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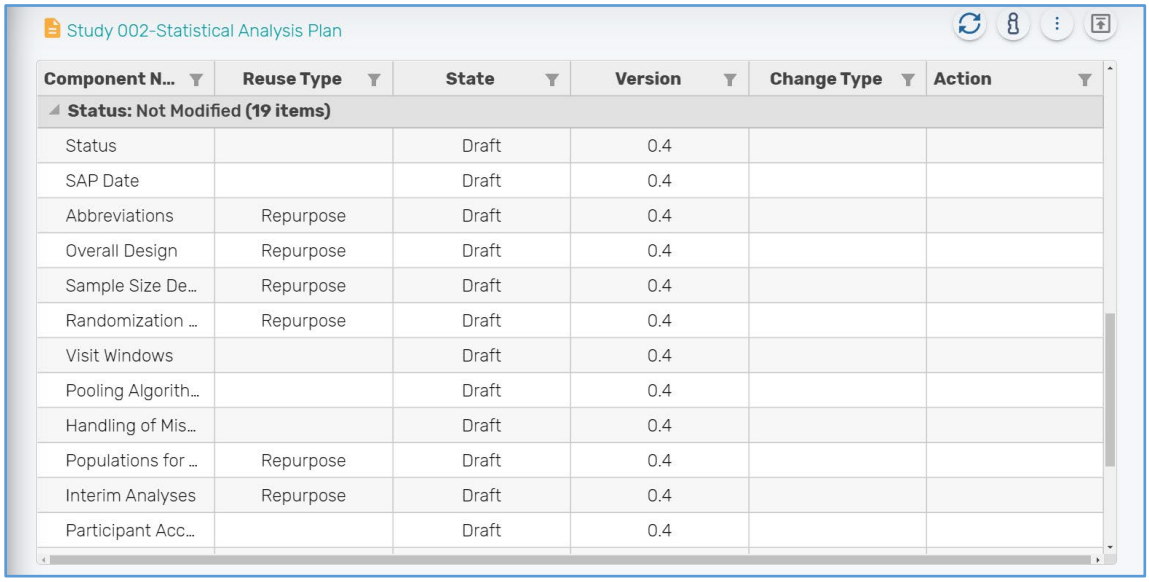
1.5 PERFORMING BULK COMPONENT PROPERTY UPDATE VIA COMPONENT STATUS REPORT

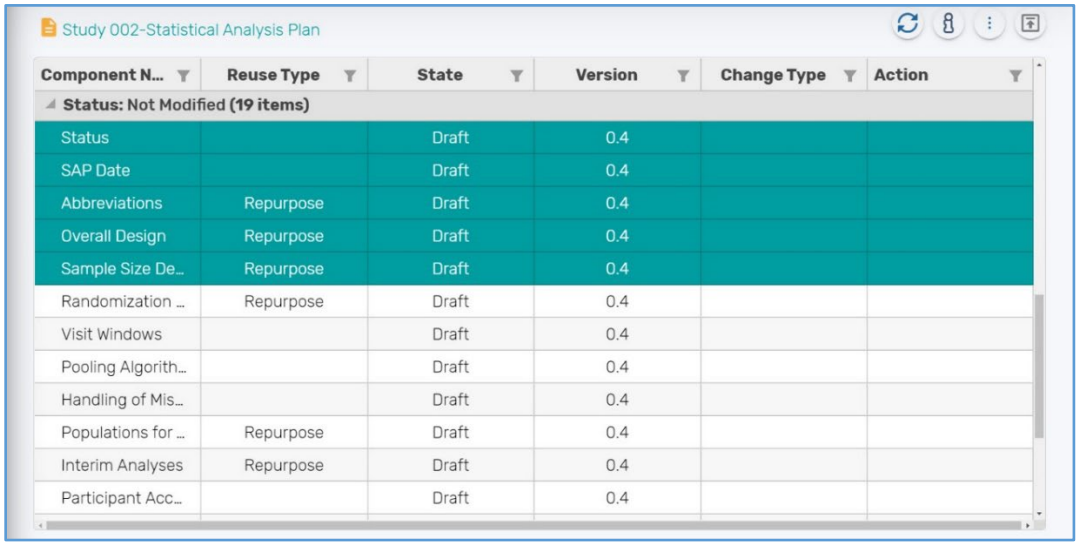
Multiple components can be updated at 1 time via the **Component Status Report** using the following steps:

1. Locate a document via the *Web Console* or *InteliNotion Word App*. Double click on the document to launch its **Component Status Report**.



Component N...	Reuse Type	State	Version	Change Type	Action
Status: Not Modified (19 items)					
Status		Draft	0.4		
SAP Date		Draft	0.4		
Abbreviations	Repurpose	Draft	0.4		
Overall Design	Repurpose	Draft	0.4		
Sample Size De...	Repurpose	Draft	0.4		
Randomization ...	Repurpose	Draft	0.4		
Visit Windows		Draft	0.4		
Pooling Algorith...		Draft	0.4		
Handling of Mis...		Draft	0.4		
Populations for ...	Repurpose	Draft	0.4		
Interim Analyses	Repurpose	Draft	0.4		
Participant Acc...		Draft	0.4		

2. Choose multiple components by clicking **Ctrl+click** or **Shift+click** to choose the relevant components.



Component N...	Reuse Type	State	Version	Change Type	Action
Status: Not Modified (19 items)					
Status		Draft	0.4		
SAP Date		Draft	0.4		
Abbreviations	Repurpose	Draft	0.4		
Overall Design	Repurpose	Draft	0.4		
Sample Size De...	Repurpose	Draft	0.4		
Randomization ...	Repurpose	Draft	0.4		
Visit Windows		Draft	0.4		
Pooling Algorith...		Draft	0.4		
Handling of Mis...		Draft	0.4		
Populations for ...	Repurpose	Draft	0.4		
Interim Analyses	Repurpose	Draft	0.4		
Participant Acc...		Draft	0.4		

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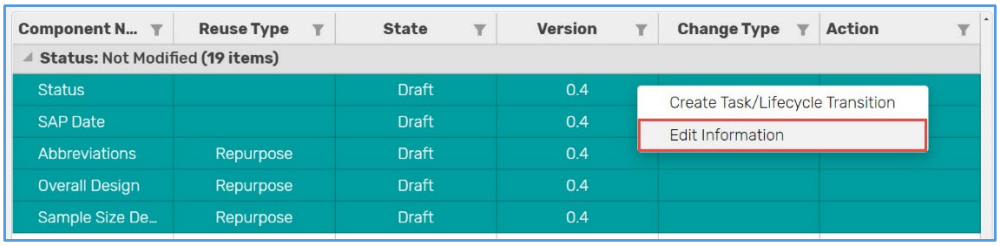
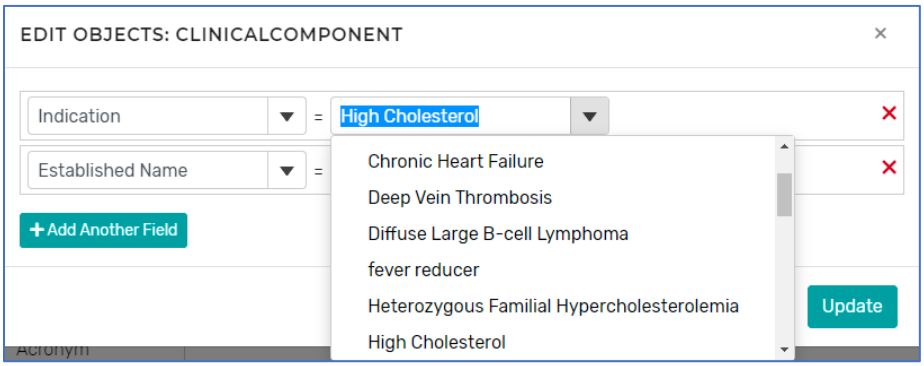
3. Right-click on the highlighted components and select **Edit Information**.

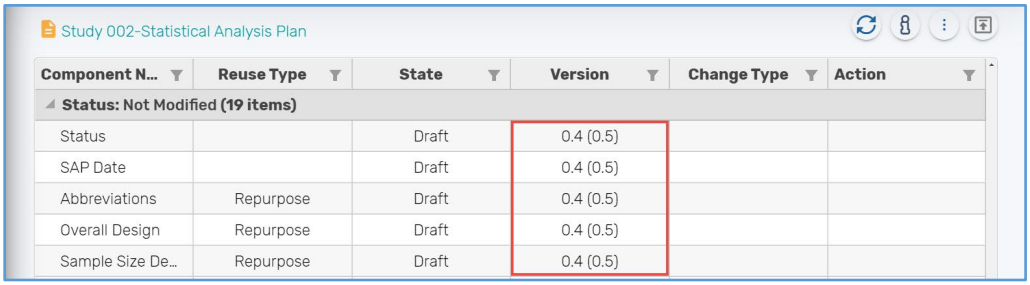


4. Click the drop-down arrows to select the property and value to edit, and click **Update** to save.



5. Add a comment for the version history and click **Update**.

6. The components will display their updated versions based on the bulk edit. The updates will auto-refresh into the document when it is next edited/checked out, if applicable, based on version binding rules. Otherwise, a user can manually refresh the updates into the closed document (see Module 8, Section 2.5 for details).



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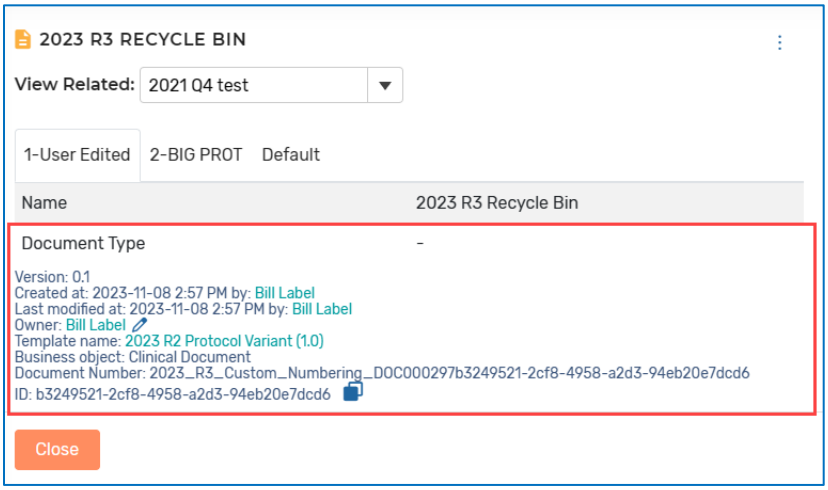
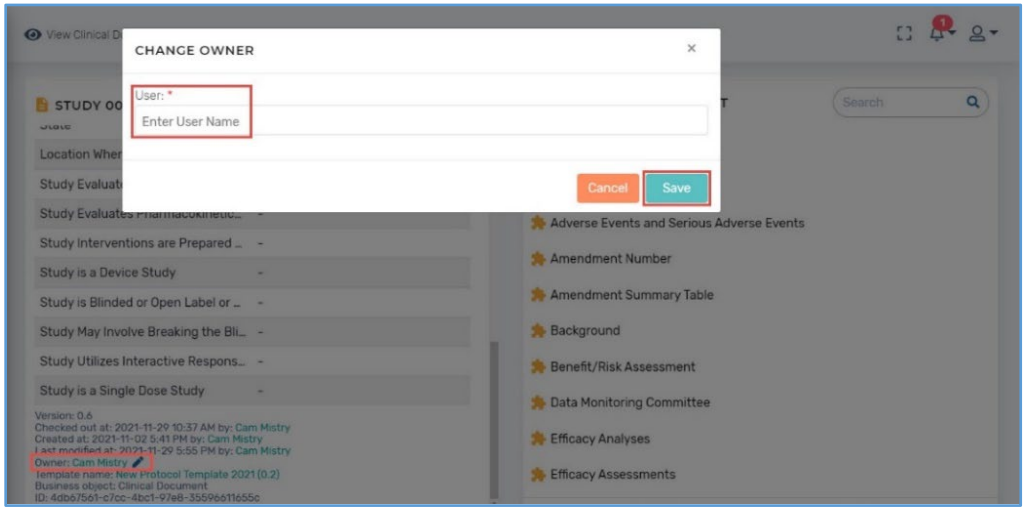
2. VIEWING DOCUMENT AND COMPONENT INFORMATION

To view the information (ie, properties) for an object (eg, document, component), either right-click on the object or click the ellipsis next to its name and select **View Information**. A page will display the properties for the object along with other information such as creation date, owner or owner change, unique document identifier, and ID.



Note: To copy the document ID, click the icon next to the unique document number.

The 'owner' of an instantiated object is always set as the user who created the object, by default. The owner can be changed by either an admin or the current user identified as the owner. To update the owner, in the View Information page click the pencil icon next to the current owner's name and enter the new user in the **Change Owner** pop-up form.



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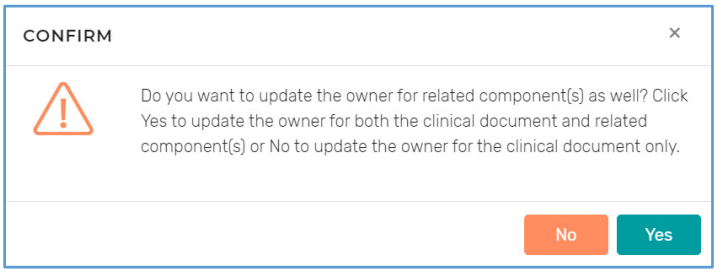
> **Note:** When an owner of an object (eg a document) is changed, this update can be viewed in the object's version history.

When the owner of a document is updated, there is also the option to update the owner for its related, editable component(s), as shown below.



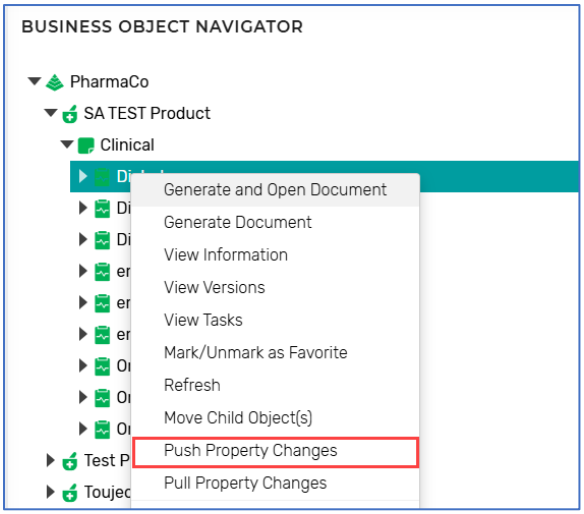
2.1 UPDATING INFORMATION FOR INHERITED PROPERTIES

Users with R-U permissions or full control admins have the option to propagate updates from a parent object to all its eligible child objects with the **Push Property Changes** action via the *Web console* or *Word app*. Child objects will be updated with this functionality unless the conditions to update are not met, eg, if the user does not have R-U permissions, the child object is approved or checked out, or if the number of child object for the parent objects exceeds the max system limit for allowable changes at one time.

Follow the steps listed below to push property changes to eligible child objects.

> **Note:** The illustrations and steps below depict the *Web console*, but it is also possible to complete this functionality in the *Word app* Navigator.

1. In the *Web console* Navigator, locate the parent object, right click and select **Push Property Changes**.



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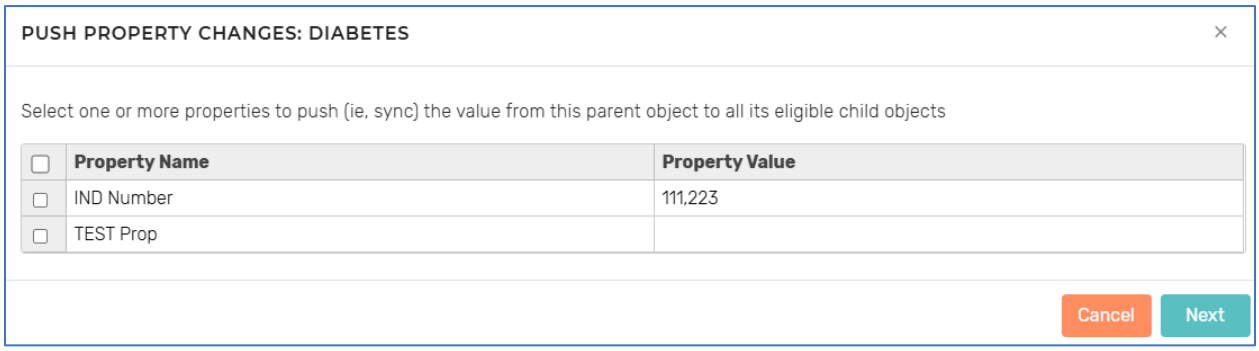
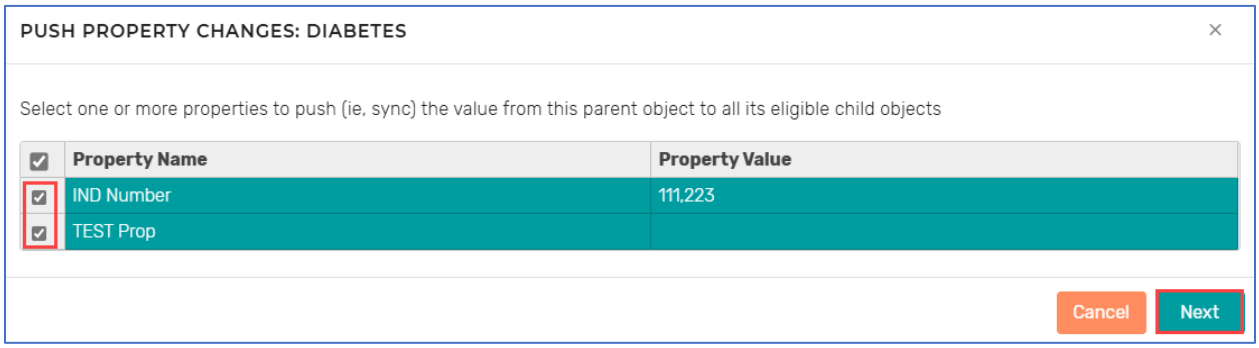
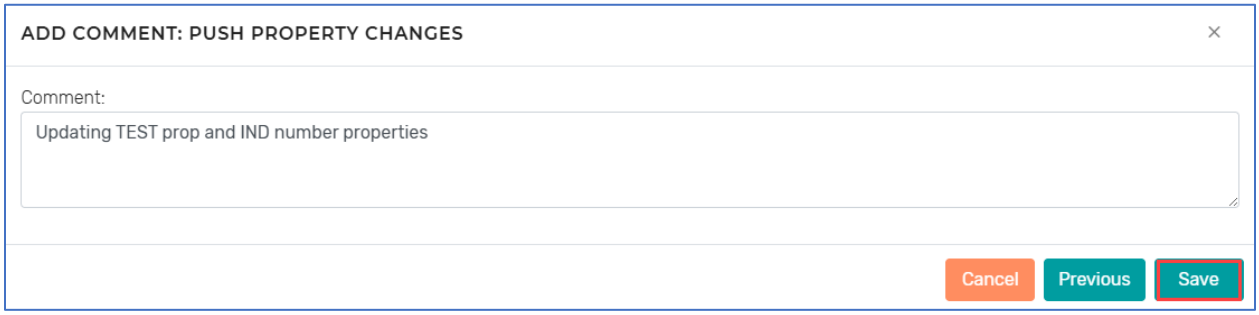
2. The **Push Property Changes** pop-up screen will display.



3. Select the desired properties to be pushed to the eligible child objects and click **Next**.



4. Enter a comment if needed and click **Save**.



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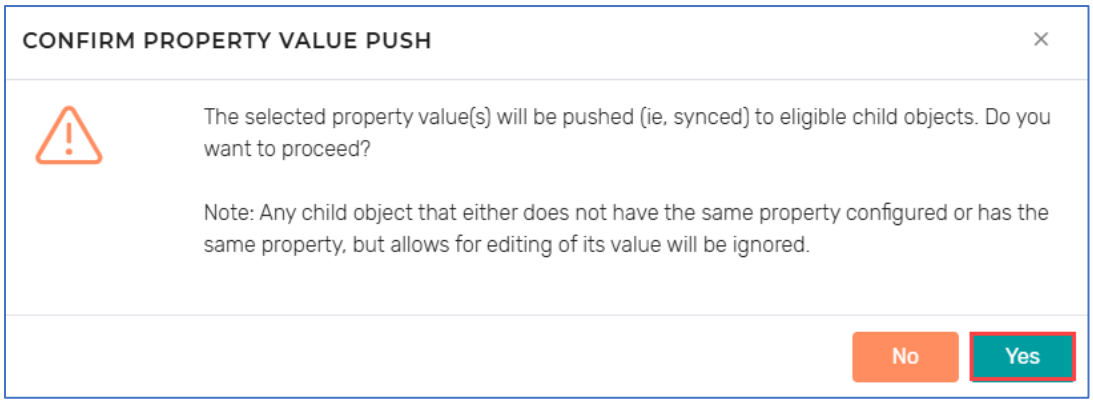
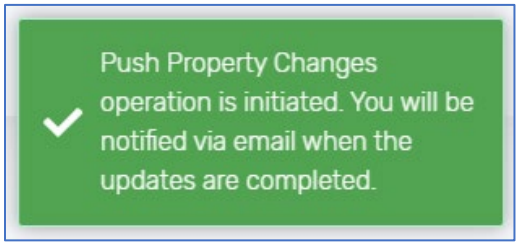
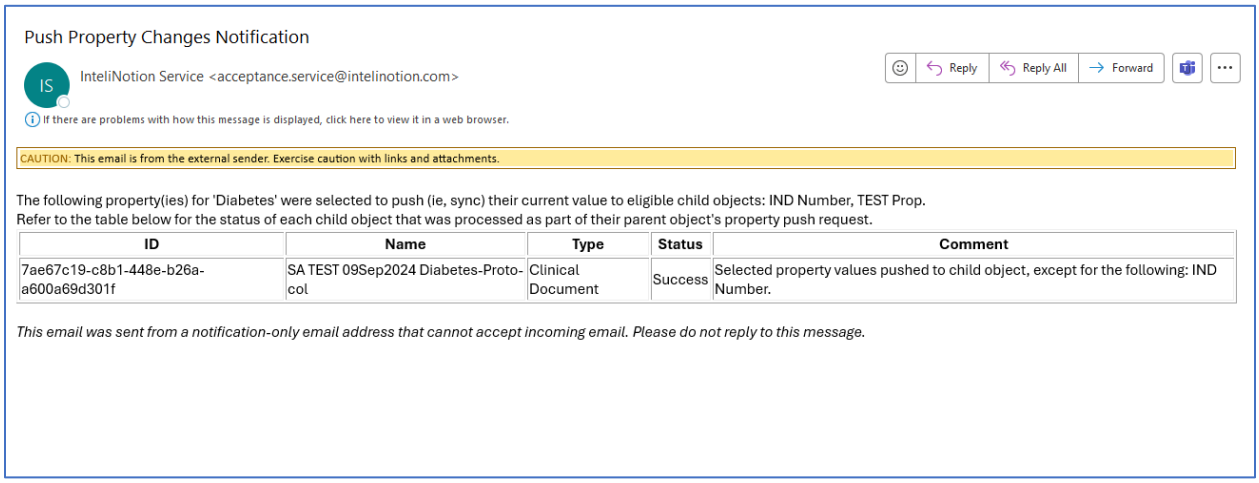
5. A confirmation screen will display. Click **Yes**.



6. A pop-up will display informing the user that the push operation has been initiated.



7. Once the operation has been completed, the user will receive an email notifying them of the status on each property and the eligible child object on which the change was attempted.



Push Property Changes Notification

IS InteliNotion Service <acceptance.service@intelinotion.com>

Reply | Reply All | Forward

If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email is from the external sender. Exercise caution with links and attachments.

The following property(ies) for 'Diabetes' were selected to push (ie, sync) their current value to eligible child objects: IND Number, TEST Prop.
Refer to the table below for the status of each child object that was processed as part of their parent object's property push request.

ID	Name	Type	Status	Comment
7ae67c19-c8b1-448e-b26a-a600a69d301f	SA TEST 09Sep2024 Diabetes-Protocol	Clinical Document	Success	Selected property values pushed to child object, except for the following: IND Number.

This email was sent from a notification-only email address that cannot accept incoming email. Please do not reply to this message.

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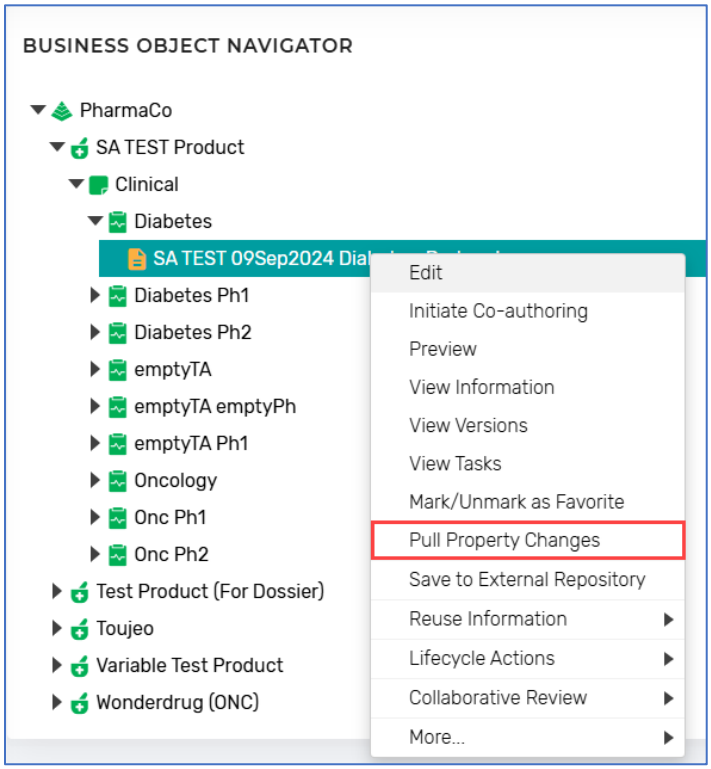
8. *IF* the email lists any child object that was not eligible at the time the property changes were pushed, the user can go to that individual object and initiate a Pull Property Changes action.

> **Note:** This action follows the same process as steps 1-6, however, a **Pull Property Changes** action is only taken on the child object selected in the navigator instead of a bulk push action.



Notes:

- Components that are not displayed in navigator will not be updated after a **Push** operation and will not be available for **Pull** operation.
- The following objects will be ignored from push operation entirely and therefore not be included in the email sent out for **Push** notification:
  - Objects that are never displayed in the Navigator (eg Components)
  - Objects that were originally displayed in the Navigator but no longer display (due to a Navigation scheme change) will still be updated, as appropriate
  - Objects that a user does not have at least Read access to
  - Objects that do not have any of the selected properties for the parent object

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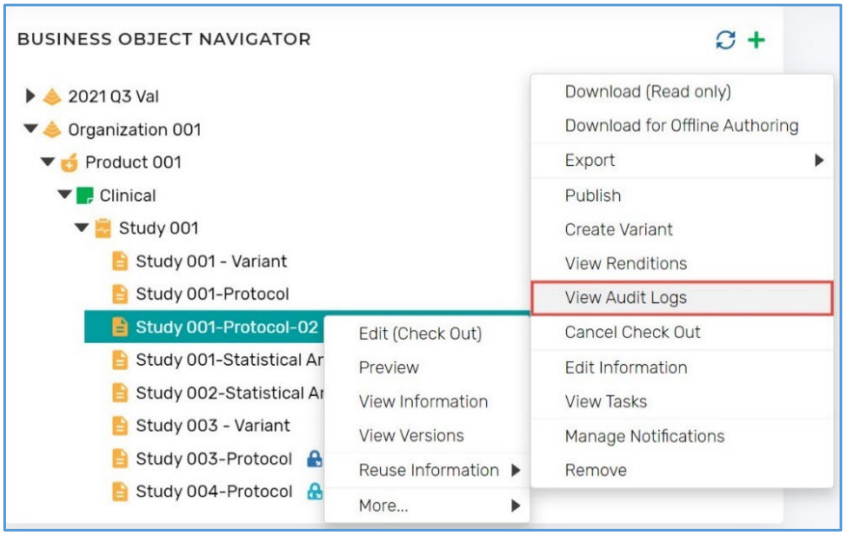
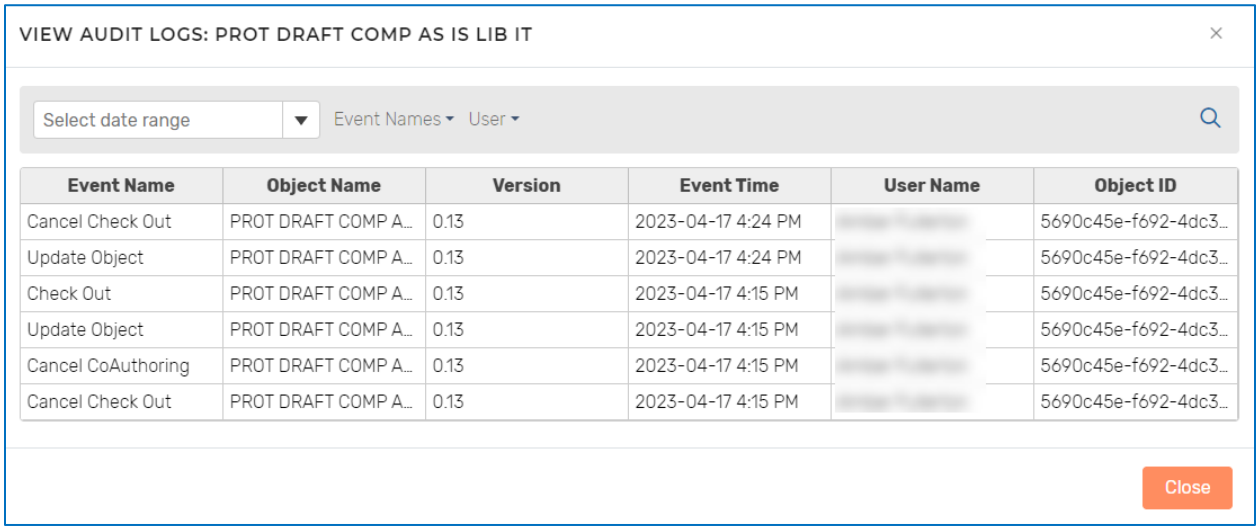
3. VIEWING BUSINESS OBJECT AUDIT LOGS

An audit log is a chronological set of records that provides evidence of the sequence of activities that have been performed at any specific time on that business object. All users can view the audit logs for a specific document, component, task, or other business object instance within the system.

1. Right-click on the business object name in the **Navigator** and under **More**, click **View Audit Logs**.



2. A **View Audit Logs** pop-up window will appear, which lists all the audit logs for that business object:



Event Name	Object Name	Version	Event Time	User Name	Object ID
Cancel Check Out	PROT DRAFT COMP A...	0.13	2023-04-17 4:24 PM		5690c45e-f692-4dc3...
Update Object	PROT DRAFT COMP A...	0.13	2023-04-17 4:24 PM		5690c45e-f692-4dc3...
Check Out	PROT DRAFT COMP A...	0.13	2023-04-17 4:15 PM		5690c45e-f692-4dc3...
Update Object	PROT DRAFT COMP A...	0.13	2023-04-17 4:15 PM		5690c45e-f692-4dc3...
Cancel CoAuthoring	PROT DRAFT COMP A...	0.13	2023-04-17 4:15 PM		5690c45e-f692-4dc3...
Cancel Check Out	PROT DRAFT COMP A...	0.13	2023-04-17 4:15 PM		5690c45e-f692-4dc3...

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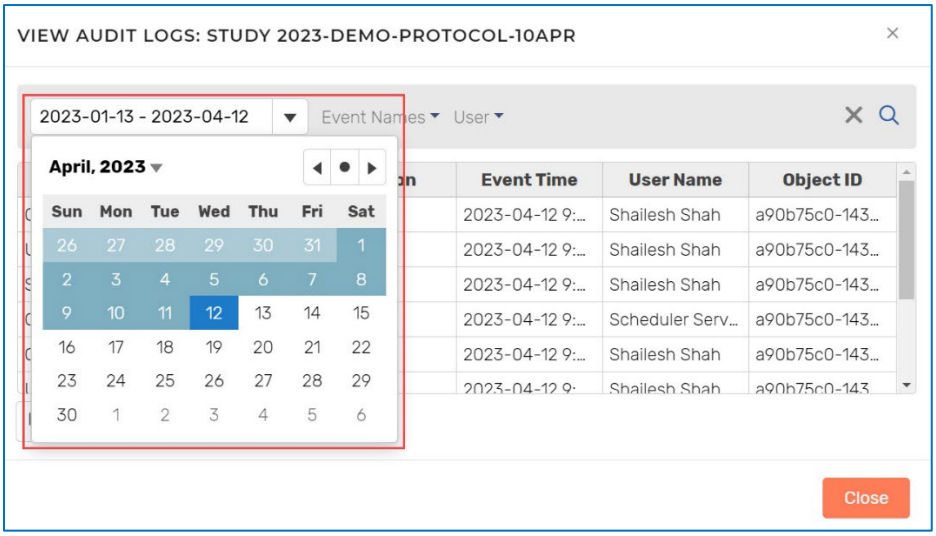
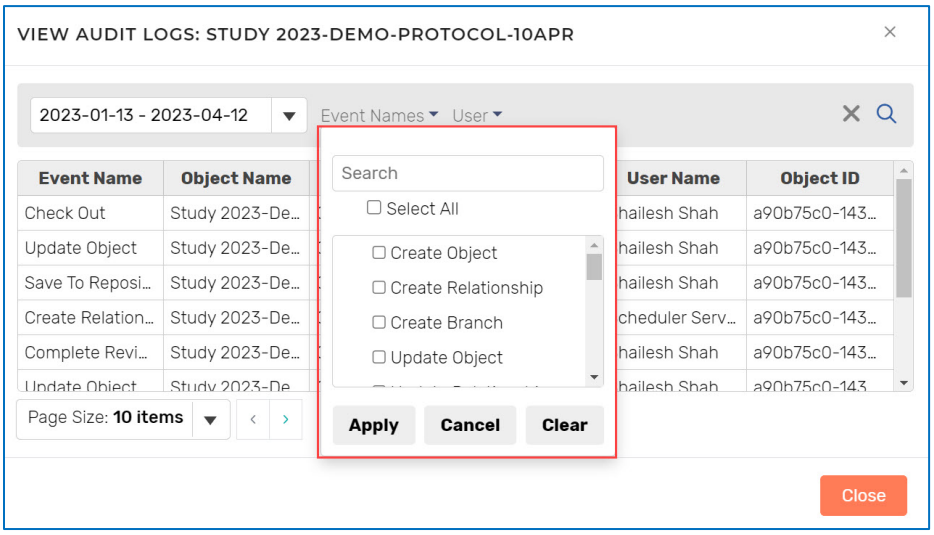
a. To change the default 90-day date range, click on the date filtering drop down field, and adjust the date range as desired.



Notes:

- The maximum date range for audit events is 365 days.
- If the audit logs contain more than the allowable limit of 205K audit events, the user will receive an error message and be prompted to add a filter or filters to bring the export under the max limit.

b. To filter for specific audit log events, click on the **Event Names** drop down form and search by event name, or scroll through the available events and check the desired checkboxes. Click **Apply**.



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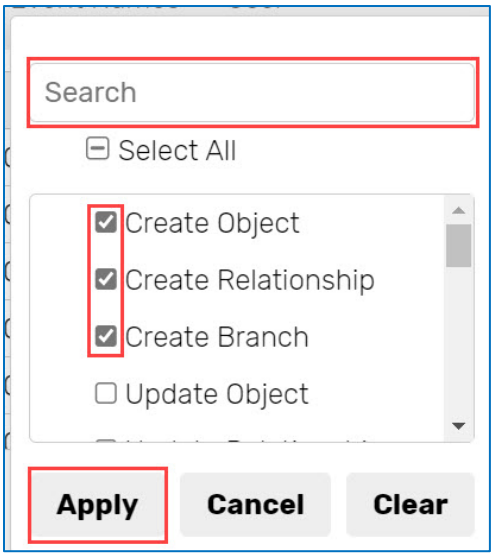
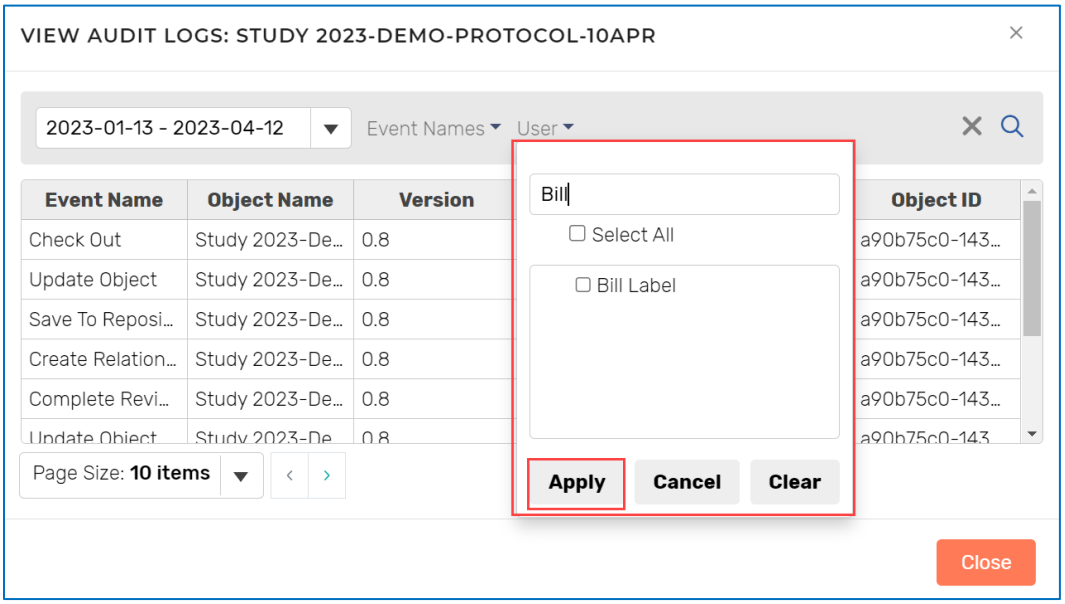


Note: All manual searches for event names are case sensitive and must be an exact match.

c. To filter for audit events associated with specific usernames, click the **User** drop down form and search for usernames. Click **Apply**.



Note: All manual searches for usernames are case sensitive and must be an exact match.

d. Once all desired filters have been applied, click the **apply** **icon** to refresh the audit log to display the applied filters.

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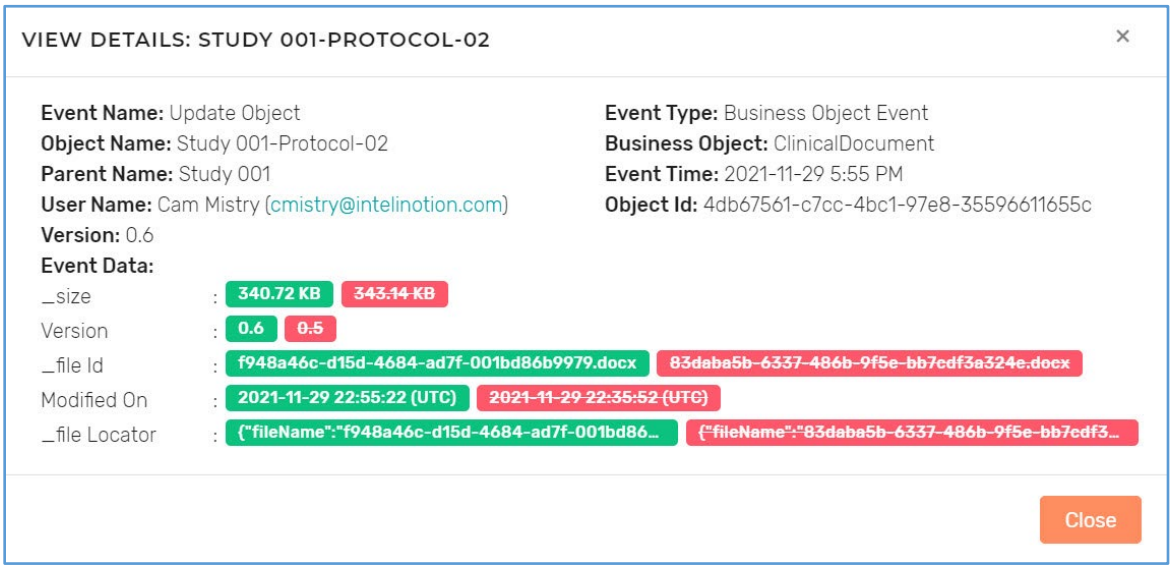
e. To clear all filters, click the **clear** **icon**.

3. Double-click on a log to view more details.



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