

Functional Area	Name	Description	Type / ID	Risk (1-Lowest, 5-Highest)	Knowledge Base	Data Impact / Level
Action Items	Action items filter for records ready for review that were previously unlocked by edit check or computation	Review levels can now be filtered for records that have been unlocked. This is commonly needed after a version migration or edit check rerun, where queries were opened or computed values were changed.	Requirement / 5186331775	2	<a href="#">New Forms Experience</a>	None / Web+Services
Action Items	Action Items, open queries table needs to filter for query type (attn issuer/attn site)	Forms with open queries can now be filtered based on the query type. This allows sites to focus only on the forms that are necessary for their role.	Requirement / 5233038059	2	<a href="#">Site Participant Calendar - Scheduling Video and Joining</a>	None / Web+Services
API	Data change audit api (form/712) needs the user who originally created the form and the date created	API endpoint that retrieves data change audit information now also provides the name of the user that originally created the record and when it was created.	Requirement / 5180064898	1	<a href="#">Record Status and Study Progress Reports</a>	None / Services Only
API	API to get study details to work with any study ID passed in (study/712)	API users can now get basic study information, like study name, type, sponsor, etc, without needing to first set	Requirement / 5242855411	2	<a href="#">External Variables</a>	None / Services Only

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		their own study location.				
API	Transaction audit report and data change audit report updated to include time of day in the filtering options	Audit activities can now be filtered based on date+time. Was previously only possible by date.	Requirement / 4843839326	1	<a href="#">Data Review Signatures and Monitoring - Batch Review</a>	None / Web+Services
Dashboard Report	New dashboard report metrics x 6	Updated and more informative charts and metrics are now included in the dashboard report.	Requirement / 4947277037	1	<a href="#">Subject Casebooks</a>	None / Web+Services
Data Entry	Web forms 7.0 Final Integrated	First production version of next-generation web forms. This will remain optional for existing studies to enable for self-validation. Forced migration will occur by 2026.	Requirement / 4886385717	3	<a href="#">Subject Casebooks</a>	Form Data Display / Web Only
Data Entry	Fixed table on old forms is clearing results	Normalized tables with a disabled field were dropping the data in that row when a postback/dynamic event occurred on the form.	Bug / 5368940453	2	<a href="#">Subject Casebooks</a>	Form Data Display / Web Only
Data Exports	Study progress report export updated to rename	The Study Progress report columns have been improved for clarity and	Requirement / 4855363612	2	<a href="#">Subject Casebooks</a>	Export Structure / Services Only

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	"Tx start date" to "Start Date" and add Randomization Date	added information. Now includes the start date rather than the registration date.				
Data Exports	Data exports need to display the file ID and name for upload fields	Background data exports have always provided file name and ID. That is now being added on direct downloads and per form exports.	Requirement / 5243033755	2	<a href="#">TrialKit API Basics</a>	Export Structure / Web Only
Data Exports	SDTM Metadata visit design definitions	Metadata added to the ODM exports.	Requirement / 4763363452	2	<a href="#">Queries - Query Comment</a>	Export Structure / Web Only
Data Exports	CSV exports need to include text labels that set to be included in exports	If a text label was set to be included in the exported data as its own column, CSV format was not including it. Only Excel was.	Requirement / 4880834197	2	<a href="#">TrialKit API Basics</a>	None / Not Set
File Repository Report	File repository zip export should export whatever the user is currently filtering in the table	Exporting multiple files from the file repository is now a little smarter, by only exporting what the table is filtered for.	Requirement / 5073273976	1	<a href="#">Report Builder (Ad-hoc Reports)</a>	None / Web+Services
Form Building	External variable dependencies get	External variables report was erroring if conditional	Bug / 5022413672	1	<a href="#">File Repository</a>	None / Services Only

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	error when they are pointed to an incomplete CA	actions were configured with those variables but were not completed. This is now prevented.				
Form Building	Rerun edit checks to also update visit date	When edit checks and computations get rerun from the form builder, if a computation causes data to change on the form's visit date field, the subject trans date table also gets updated with that date so they stay in sync.	Requirement / 5163078831	2	<a href="#">Form-building Tools ReRun Edit Checks</a>	None / Web Only
Form Building	SDTM annotations on PDF annotated forms	New form export option in the form builder to get the PDFs with only the field names indicated, rather than the entire data dictionary.	Requirement / 5124720797	2	<a href="#">Queries - QueryRedeploy</a>	None / Web Only
Form Building	New form property to "Prevent form editing" of completed forms	Forms now have a new property relevant only for ePRO forms (for now). The new property prevents Participants from editing forms that have been completed.	Requirement / 5379459428	1	<a href="#">Action Item Report - Unlocked Records</a>	None / Web Only
Form Building	Form builder- form	Forms with a high number of	Requirement /	1	<a href="#">Trialkit Data Entry</a>	None / Web

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	with several tabs/pages needs to wrap	pages/tabs are now easier to work with, where the last tabs are accessible without needing to zoom out.	5360050268		<a href="#">Basics - Search</a>	Only
Form Building	Field property 'Med code field' support for memo fields	Med code field property can now be set on memo fields.	Requirement / 5349836680	1	<a href="#">How to get-Support - Rapid Copy</a>	None / Web Only
Form Rendering	Increase tab size and font on multi-tab forms	Tabs on forms are updated with higher visibility and easier to tap.	Requirement / 5340117111	1	<a href="#">Randomization - Define</a>	None / Web Only
General	Button to copy host and study details to clipboard	New shortcuts for users to quickly copy details about a study, subject, or form. This is helpful for users to grab info to paste to an external location such as in an email to a Data Manager or to TrialKit support.	Requirement / 4955416717	1	<a href="#">Form Data Audit Reports - Transaction Audit</a>	None / Web Only
General	Updated Common Navigation Buttons	Updated common navigation buttons for easier clicking and use with touch screens. Also added a shortcut in the header area to access the subject manager screen.	Requirement / 5241436877	2	<a href="#">Report Builder ad-hoc Reports - Setup Reports</a>	None / Web Only
General	Embed email	The study home screen html	Requirement /	1	<a href="#">Field Objects and</a>	None / Web

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	address links on web page builder	editor now supports email links for study Admins to provide embedded links to an email address.	5108415910		<a href="#">Types Common Props</a>	Only
General	Option to Display dashboard report on home page	The study home page can now display basic site progress reports without any configuration necessary. Read the associated help article on how to quickly do this!	Requirement / 5081003423	1	<a href="#">Action Item Report - Forms With Queries</a>	None / Data Model+Services
General	TrialKit Learning Center option in Account menu	TrialKit Academy is the new training program offered by CDS to Study Managers and Administrators.	Requirement / 5108442612	1	<a href="#">Navigating Trialkit - Web Clinician</a>	None / Web Only
General	Change to menu interactions from hover to on-click	Menus now require the user to click to expand the menu and again to close the menu, rather than being based on mouse hover. This makes the website more mobile-browser friendly.	Requirement / 5353566314	1	<a href="#">Data Exports - Extract All</a>	None / Web Only
PDF exporting	Form with "/" in the name cannot be exported to PDF from the longitudinal	Slash character was preventing the single form PDF export to fail.	Bug / 5316546253	1	<a href="#">Form Building Tools - Annotate</a>	None / Web Only

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	view					
Query Management	Update query popup window button text to "Save" with hover text	Minor text update on query dialog save button.	Requirement / 5030940105	1	<a href="#">Customized Landing Pages -Build Web Page</a>	None / Web Only
Query Management	Query batch redeployment	Ability to redeploy queries in batches from the query manager. This is helpful in instances when a new role is added and needs to have visibility of existing queries.	Requirement / 2535345771	2	<a href="#">Customized Landing Pages - Build Web Page - Home Site Report</a>	None / Web+Services
Randomization	Randomization confirmation email needs to follow user's permanent roles	Randomization notifications were not being sent for Admin users that had changed their role to another role.	Bug / 4880679732	1	<a href="#">Study Functionality Settings - General Functionality</a>	None / Web+Services
Report Builder	Decode multi select field values in report builder	Reports in the report builder Previously only provided the coded values for multi select fields. Now provides decoded text as standard output.	Requirement / 5178154231	1	<a href="#">Dashboard Report - Chart Descriptions</a>	Export Structure / Web+Services
Report Builder	Report builder - ability to include unique record ID for	Record ID added as an option to include for reports that are based on site or	Requirement / 4796361011	2	<a href="#">Trial Master File (eTMF)</a>	None / Web+Services

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	site/study forms	study forms.				
Site Summary Report	Subject Summary report renamed and updated with additional details	The Visit summary report has been updated to include details about the progress of each subject.	Requirement / 4796008433	1	<a href="#">PDF Exports - PDF Single Record</a>	None / Web Only
Site Summary Report	Export Subject Visits report (TKDrive version) from the subject summary	The subject visits report, previously only available via TKDrive, can now be accessed from the Site summary report to give overview of all subject visits.	Requirement / 4811993626	1	<a href="#">Form Properties - Prevent Form Edit</a>	None / Web+Services
Study Configuration	Study configuration option to enable participant payments	For studies that are licensed for Nmible patient reimbursement, this new setting will enable a button for Participants to access their payments.	Requirement / 5305657324	2	<a href="#">Role Rights and Permissions - Pages Granted to all Users</a>	None / Web+Services
Study Configuration	Study configuration functionality updated with more organized layout	Study functionality tab updated to more closely mimic the mobile app organization.	Requirement / 5312994154	1	<a href="#">Scheduled Visits and Visit Cohorts Set-up - Visit Schedule Configuration</a>	None / Web Only
Subject Record Management	Relocate report buttons on subject manager and add	Site summary, scheduler, and dashboard shortcuts all now available from the top of	Requirement / 5080741340	1	<a href="#">Subject Casebooks - Subject Status</a>	None / Web Only



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	shortcut to dashboard report	the subject manager table.			<a href="#">Graphs</a>	
Subject Record Management	Move log form ID column to the end of the table	Relocated the record ID column in log form tables to the right side of the table so users would not confuse record ID with a user-defined log field.	Requirement / 5033002654	1	<a href="#">Study Functionality Settings - Study Configuration Access</a>	None / Web Only
Subject Record Management	Subject search is allowing access to casebook if registration form is in error	Subject search on the right side of the screen no longer allows access to subjects whose registration forms are in error.	Bug / 5013497833	2	<a href="#">Form Building Tools - Form Pages</a>	None / Web Only
Subject Record Management	Blinded log fields need to be masked in log table	Log tables now blind data if the user role is blinded. Previously it would have depended on the study Builder not including blinded fields in the log table.	Requirement / 5203127855	2	<a href="#">Data Exports - Extract All</a>	None / Web Only
Subject Record Management	Firefox browser showing review progress bar at 50% in subject manager if the review is at 0%	The review progress bar chart in the subject manager was not working in firefox browsers.	Bug / 5323176002	1	<a href="#">Subject Casebooks - Data Entry</a>	None / Web Only

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Trial Master File (TMF)	TMF text wrapping	User interface improvement with long file names in the TMF.	Bug / 5201244289	1		None / Web Only
TrialKit Engage	ICS calendar notifications need to indicate the system timezone and instructions to join meeting	Calendar invite notification to the Participant updated with more information.	Requirement / 5066798836	1	<a href="#">Adding Sites to the Host Account - Add Sites</a>	None / Services Only
User and Site Management	Remove dynamic CAs in Site Manager	The Site Manager option for "Dynamic CAs" is being deprecated in this release.	Requirement / 5364223634	1	<a href="#">Field Objects and Types - Memo</a>	None / Web Only
Visit Schedule Design	Add forms list to the scheduled visit and event exports	Added list of forms to the scheduled visit design export file. This also indicates which forms are required at each visit.	Requirement / 5017059424	1		None / Services Only
Workflows and Review	Volume batch records with signature is signing users out of the system	If volume batch record locking was utilized with signature, the user would get kicked out of the system after applying signature.	Bug / 5038983265	1	<a href="#">Data Exports - Extract All</a>	None / Web Only