2014-07 Release notes

This document highlights some of the more important and visible changes in this release of IRBManager. In addition to the issues listed here, there are a number of other enhancements and fixes; the full list of development tickets (IRBDs) appear at the end of the document. This document also covers fixes that were moved to production since the last release. We’re always striving to improve IRBManager to meet and exceed your expectations, so please don’t hesitate to contact us with any questions you may have about these changes or anything else in IRBManager. And remember, we can’t fix it if we don’t know it’s broken, so please let us know if something isn’t right.

System Wide
- Can collapse/expand the left navigation bar (which includes the Actions, Links, Messages, etc…) for additional room or a full screen view. Either by clicking on the separator or pressing Ctrl-Alt-Left Arrow to hide and Ctrl-Alt-Right Arrow to show
- Links and messages can now be marked as internal-only
- Searching in the quick find box (Ctrl-Q) now searches for studies by user defined field on study, study site or PI
- Change in browser support statement – IE6 is no longer a supported platform

Admin / Staff homepage
- Change dropdowns to auto complete
- Add support for searching by contacts other than PI
- Open Items list can be either limited to only the past ‘x’ days (e.g. 30, 60), or even suppressed completely. You can maintain these settings in the System Values menu on the Administration Tab. If you have too many old and useless items talk to support about automatically cleaning them up. Just hiding the problem doesn’t solve it, but if you must… you now can

Study Details Screen
- Completely rewritten to enhance capability, function, and stability
- Protocol section can now be temporarily collapsed to provide more room
- We can now restrict the ability to click on a contact name and see contact details
- Sponsor protocol codes can now be up to 250 characters (previously 50)
- Add and Edit of a contact now occurs in popup window
- Selection of a contact to add is now autocomplete for study-site contacts
- Contact maintenance doesn’t reload entire page
- Contacts are consistently shown as Name then Role
- Add multiple attachments at one time, including drag/drop upload of attachments
- Attachment columns lay out better, non-internal attachments are now better indicated
- Attachment size limits have been removed completely
- Event reviewers are combined into one column, with the primary in bold. If you’re not using primary then none will be bold
• Events have new enhanced filter option in thin row at top of list of events. Hover over the thin row and try adding “2013” to the start date column, for example.
• Note column layout is consistent with other screens.
• Non-internal notes are better indicated.
• Notes support enhanced filtering like events.
• Actual note text is better encoded to prevent style and script leakage from w/in a note.
• On generated docs, we now show the internal flag. Generated docs have always been non-internal unless you drilled into a doc and changed the flag. But you had no way of knowing the setting w/out drilling into each.

Study-Event Edit / Display
• Completely rewritten to enhance capability, function, and stability.
• Skipped steps can be hidden from the display through a checkbox on the steps table.
• Notes portlet can now be collapsed.
• Notes portlet supports enhanced filter.

Dashboard
• xForms marked as complete, and xForms you’ve signed, but are not yet signed by others will no longer show as awaiting you attention.
• Increased control over what shows on the dashboard, including the ability to show (or not show) attachments and conditions.

Contacts
• Ever need to replace Contact 1 with Contact 2 on every study where Contact 1 is the coordinator (or CC, or Advisor, etc.)? You now can! Bring up Contact 1’s contact record and click Replace Contact. You can replace, add, delete, in all roles except PI -- we figure changing PI should be a bit harder. Additionally, although this is called ‘replace’ contact, you can also use it to add a new, but leave the old or just delete the old.

xForms
• Page Jumping! We now support the ability to jump between pages of an xForm while completing in. Like we did with the collaboration rollout, xForm definitions now have an option to enable, disable, or inherit page jumping, and the default system value is to disable page jumping. This allows you to roll it out to specific forms as you see fit (please enable it, it’s a great feature.) At the top of the xForm (if page jumping is enabled for that xForm) is a dropdown of the pages the user can jump to. We’ll only show pages in that drop down that are available based on the questions the user has filled out already. So if they say “No” to the radiation question, they can’t jump to the radiation pages, say “yes” and they can. Keep this in mind when setting default values for questions, as that will allow users to jump to common pages quickly.
• Page numbering - We now show “Page x of y” at the top of the xForm.
• Conditions on questions are now supported! You can condition a question on any question before it, including other questions on the same page! This will control whether or not the question appears.
• We’ve added a concept of a supplemental question. This is a question that shows up in the same box as the base question, and often only if a condition is met. For example, “if no, explain...” no longer looks to be a separate question, it can now be a supplemental question to the yes/no question. You can also make the supplemental question required, and if it’s shown it will be required, if not show, not required. This eliminates the need for many page actions that checked for these additional-info type questions.

• Send Email action now allows you to send to multiple contacts and specific emails at one time. No need to duplicate the action just to send to 3 different people

• Stage action to set the status of a step on an event. –This actually made its way into production after the last release, but this action allows you to set the status of an event step to completed, not completed, or skipped. This allows xForm workflow to better update the event steps.

• Table Question - You can now show a repeating group as a table on another page. The Table question takes all the questions from a page group and renders them as columns in a table. The rows are then repeats of that group. This table question is then added to a normal page to allow simpler capture of repeating information

• Like attachments on Study Details, upload size limits have been removed

Event Definition

• Steps can be set to prevent the editing of their actual date and status. This is useful when the date and status will be set via minutes, xForms, or API calls and you want to prevent any direct changes to those values

Audit

• While we’ve always captured the audit of user defined fields, we didn’t have a convenient display of that audit. We now show user defined fields at the top of the audit display for the object (study, contact, site, etc.) they extend

• The display of audit was rewritten to show “long” fields w/out you having to click into the field in many cases

• We no longer strike out the old value, as the strike could make it hard to read the underlying value

Validation – In keeping with our statements on validation we again can state that our requirements conform to our user’s general needs and intended uses, that these requirements as implemented through software can be consistently fulfilled, and that we can ensure accuracy, reliability, consistent intended performance, and the ability to discern invalid or altered records. Please note, this alone may not be sufficient validation for your usage; it is ultimately your responsibility to validate that IRBManager, as implemented by your institution (xForms, Events, Templates, etc.), meets your needs.
**Browser and OS Support** – Since we’re often asked what operating systems and browsers we support we want to clarify our position on this: For operating systems we support the current versions of Windows, Linux, OS X (Mac), iOS (iPad/iPhone) and Android (Google). Current is defined as being eligible for mainstream support by the operating system’s vendor(s). For browsers we support the current (N), previous (N-1), and previous-previous (N-2) versions of Internet Explorer, Firefox, Chrome and Safari on supported operating systems. We do not support beta versions of browsers, but appreciate any reports of problems in a beta version. IRBManager may, and likely will, work in many unsupported browser/operating system configurations, but we will not provide anything beyond cursory support if the issue cannot be reproduced in a supported OS/browser configuration.

**Nomenclature** – A quick word on the “Study”, “Description” and “PI” nomenclature, as you know, you can change the text we show in many IRBManager screens for the phrases Study, Studies (plural), Description and PI to better fit your needs. Some call them Studies, others Projects, others Protocols, it’s up to you. However in our communications with you we will refer to them as Study, Title and PI, so please translate as necessary for your institution. Also, not all IRBManager screens have been migrated (yet) to use the client-specific phrases, but all non-staff (PI, coordinator, sponsor, etc.) facing screens should be completely translated.
Full list of issues

Changes in this release – Enhancements

IRBD-99  On /cm/ContactView.cfm show UDFs
IRBD-114 Enhance Create Protocol xForm Action to take IRB Committee -- check for dup
IRBD-140 Allow IRBAdmin/Staff/Members to add notes to completed xForm
IRBD-141 Allow Multi-recipient emails on the xForm send email action
IRBD-146 Client option to remove primary contact functionality
IRBD-149 View/Sort/Filer Study Status in Protocol/Protocol Site Association on Contacts
IRBD-187 Show number of events in each category on agenda / minutes
IRBD-188 Agent Type field should allow edit of all its 50 characters, not just first 25
IRBD-300 Display of expiration data on contact pop-up window.
IRBD-307 Extend System Values to allow setting of default status of new study-site (Option 20)
IRBD-322 Add collapse/expand support to notes on events, like portlets on study details, and note sorting
IRBD-333 Increase limit on the size of the site name from 50 characters to 250 characters.
IRBD-357 A link to a (now) deleted xForm still works, sort of. Should simply not show xForm
IRBD-376 Add visualization of which event steps have notifications on event step definitions
IRBD-397 xForm that you've signed no longer shows up as needing "your" attention once you've signed it.
IRBD-429 Prepopulate sequence number for stages, pages and questions in xForms
IRBD-450 Change "Find" results to bypass listing results if there's only one match
IRBD-453 Add a "Replace Contact" action on a contact to replace all uses of contact A with contact B
IRBD-488 Lock out most/all actions on studies marked as "Not research"
IRBD-489 Add a "Set Step Status" action
IRBD-499 Allow adding study level contacts from multiple Sponsors
IRBD-579 Trim password before checking to remove leading and trailing spaces
IRBD-582 Add Title to Event page
IRBD-637 Expand Sponsor Protocol Code field from 50 to 250 characters
IRBD-643 Add page control to restrict ability to click through to details of a PI on study details. -- Only show name, not link
IRBD-646 Display the owner name (Study 123-WA, SAE Reported 1/16, etc) on top of attachment list and add-attachment screen
IRBD-666 Make it clear that an xForm is COMPLETE when user has access to "Reject Now" on a completed xForm
IRBD-699 Remove ability to add an entry to an event instance picklist from the study event screen, must be done in admin
IRBD-704 Allow users to send emails from the event level instead of having to click on the envelope for an attachment.
IRBD-708 On event notification add option to include a link to the event in the notification email
IRBD-711 Expose max approval period as system value
IRBD-713 Show "other" reviewer on member view so reviewers know who the other reviewer is.
IRBD-724 xForms "Awaiting your attention" should ignore any xForm marked as complete
IRBD-726 Add option to suppress Open Items on the admin home screen
IRBD-729 Ability to move Rejection Reason into a note without having to type it in a second time
IRBD-733 Change ProtocolSite to not allow nulls for PIContact_ID column
IRBD-739 Sortable Administrative Tables
IRBD-779 An xForm should not "adopt" users from the last time this instance was in a given stage
IRBD-820 Add support for marking links and messages as internal-only
IRBD-989 Complete Y/N on event step can be made read-only for instances where it’s changed from minutes, xForms or API
IRBD-1019 xForms - Right clicking and opening Add Condition shows blank page (opens via Javascript)
Changes in this release - Fixes

IRBD-9 Consistently show entry date and user on a note, don't flip between entry user and last change user
IRBD-51 Category question type on xForm should show blank even for required
IRBD-54 xForm Pencil on User Question type does not work.
IRBD-58 New User Screen - Department listing alphabetically
IRBD-61 Emailing attachments that were renamed
IRBD-66 Default Investigator Name in automatic emails
IRBD-102 Updating (adding?) a send email action where the from-address isn't a contact in system causes ysod
IRBD-110 If you change the role of a primary PS contact it's possible to end up with contacts in a role but no primary
IRBD-119 Attempting to select a Contact in xForms where the contact has an address with no State causes exception
IRBD-125 User Defined fields marked as main page not on Edit Protocol Site
IRBD-163 Choosing parent events error when parent has apostrophe fails
IRBD-197 View of event attachments for IRBMembers
IRBD-201 Committee List on IRB Member's view of find seems to use IRBMember not ActiveIRBMember
IRBD-233 Some requests to Notifications.aspx don't send a retURL
IRBD-235 Stage Action Send EMail still checks that the email recipient is a _user_ if you specify a specific To Address
IRBD-252 Leading quote in study title can cause error in xForm in certain situations
IRBD-264 When importing a template if the new template name including the "(copy)" is > 50 chars -- boom
IRBD-287 My Forms should show "Start xForm" not "Start Form" (note the missing 'x')
IRBD-305 Logo doesn't show on printed forms
IRBD-361 Trying to add a phone # while editing a contact (Clicking the "Edit" button) goes boom
IRBD-363 xForm Yes/No Questions have extra blanks
IRBD-375 Starting an xForm from dashboard doesn't ensure that submitted has an email address
IRBD-382 In certain cases the expiration report prevents you from clicking through to a contact, and there's no export functionality
IRBD-410 Duplicate contact name check doesn't show list of dups nor good error/warning message
IRBD-413 Admin home page should show (Deleted) next to deleted sponsors
IRBD-482 QTAttachment not allowing you to set # of attachments if you don't set the attachment type.
IRBD-483 Editing a contact removes them from the IRB role if they're in that role
IRBD-533 Display of some audit values in xForms goes boom -- Actual audit fine, just display an issue
IRBD-548 Attempt to save a contact expiration w/invalid data causes YSOD
IRBD-561 And email with [ ] seems to pass validation and YSOD on move to next page.
IRBD-563 Deleting a contact's phone number and then editing a second one caused CFM boom
IRBD-601 Event Resolution report doesn't soft-code "Study" column header
IRBD-606 EMail History should show "Partial", not "P" for partial success sends
IRBD-620 SEC: If user has access to Agents from dashboard they can maintain the data!
IRBD-630 Requests to old login (index.cfm) should auto-redirect to new login
IRBD-670 Long names for notifications causes YSOD
IRBD-673 Attempting to retrieve password w/out a client id can cause YSOD
IRBD-674 SEC: Non-internal Parent Event Can Access Internal Follow-up/Child Event
IRBD-688 Leaving the expression blank on a calculated field throws YSOD instead of friendly "expression required" error
IRBD-690 Generating letters from minutes without a template selected still goes boom
IRBD-707 Condition icon on Pages shows as yellow even if all conditions are deleted
IRBD-710 Number question allows a math expression like "5 + 2 + 13 +1" to pass validation
IRBD-717 Number question allows "N/A" to pass validation
IRBD-722 xForm EMail Drop Down question doesn't work in conditions, works fine in actions
IRBD-725 There "where" no steps found for this event.
IRBD-727 Copy for Amend not honoring "No" flag on Forms By Owner
IRBD-732  Search box on contact list should trim argument to remove trailing spaces
IRBD-744  "Create Note" action in studyEventEdit fails when event title has an apostrophe char
IRBD-745  xForm Questions "Add Note" will trigger xForm Questions Javascript functions
IRBD-746  Stage Action Type "Set Event Reviewer" doesn't set selected type upon loading StageActionEdit
IRBD-752  Redisplaying an xForm page with an error can cause QContact select to lose it's selected contact info
IRBD-787  Unanswered date question does not use standard "No answer provided." text
IRBD-795  SAT Send EMail Doesn't correctly handle Event Output questions
IRBD-796  When reloading a contact list after edit we lose click to filter.
IRBD-798  Study details doesn't handle empty (ZERO) irb committee
IRBD-801  xForms: Allow deletion of an xForm that is in signatures stage on xForm reports
IRBD-803  Reviewer Studies from Home goes boom
IRBD-804  Meeting List doesn't sort correctly w/new tablesorer
IRBD-805  "Awaiting your attention" count doesn't seem right on dashboard
IRBD-806  On home page add padding to text boxes to match what's happening in auto-select list
IRBD-807  YSOD on Adding Meeting Attachment: Owning Description with HTML Tags
IRBD-808  YSOD from Attempt to Add/Edit Location without a Name
IRBD-810  YSOD on Help Pages
IRBD-811  Ctrl+Left/Ctrl+Right are suboptimal choices for collapse/expand of left nav
IRBD-812  YSOD on Attempt to Re-Open xForms w/ a Single Stage
IRBD-814  Incorrect password given in "Old Password" field is accepting without showing error message
IRBD-816  "Contact Search" gives wrong result
IRBD-817  YSOD from Edit Department on Chair Field (RadAutoCompleteBox)
IRBD-819  Selecting a Contact for Edit in Contact List -> Contact Search Action is broken
IRBD-821  Links should always open in a new window from .net pages (they do from cfm pages)
IRBD-822  CFBoom when attempting to re-add a deleted UDF with the same field name
IRBD-823  CFBoom on attempt to "Add New Protocol Status" while Adding New Protocol Status with Invalid Fields
IRBD-825  YSOD on Attempt to Add PickList UDF w/ Empty "Entry" field
IRBD-827  YSOD- xForms- Update question help with empty text
IRBD-828  YSOD- xForms- Create new draft from existing xForm
IRBD-829  Edit Committee Member - Attribute set to NO, label is not displayed
IRBD-830  Study Event - Allows Start Date to be greater than End Date
IRBD-832  Contact Search - Index selection filters by last name
IRBD-835  YSOD xForm- Add action for pages with Type as redisplay with message and hit update
IRBD-836  YSOD xForm- Add action for stages with Type as send email, Hit update
IRBD-837  YSOD xForm- Renaming the question label
IRBD-839  xForm Filter - Hitting "Enter" on Will Always Prompt to copy the first xForm Listed Pre-Filter
IRBD-842  YSOD Reports- When hitting submit in studies by Agent Type
IRBD-843  YSOD xForms- Adding stage with allowed roles
IRBD-847  Study- Hitting done in Sponsor(s) showing Cancel alert box
IRBD-852  YSOD Study Condition- When Submit button is chosen without condition
IRBD-854  Study by year- when protocol is zero Committee is not shown
IRBD-855  Template edit allows non-word uploads
IRBD-856  Study Status- Right clicking and choosing open in new window is showing blank page for PI
IRBD-858  Create Study- Additional site details is shown only after update button is chosen from study site
IRBD-862  YSOD Messages- Hitting submit without entering Message Name field
IRBD-869  YSOD- When choosing Preview and view in word from New format of Minutes header
IRBD-875  YSOD Site- When enter is chosen on Expirations for Site
IRBD-876  YSOD - Add Study Site - Cancelling after validation
IRBD-877  Possible CFBoom with retURL when toggling from Committee Studies to Reviewer Studies
(IRBProtocolList.cfm)
IRBD-878  Replace contact - Replace Contact has selectable Roles of Old Contact!
IRBD-883  YSOD Committee Member Notes - Cannot Submit, Cancel or Delete Note

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IRBD-886  Prevent non-privileged users from deleting a note on an xForm question unless it was created by another non-privileged user.
IRBD-893  YSOD Protocol Site Expiration Notifications on Contact Recipients
IRBD-897  Event Steps Between Dates- Check Box Operation is not working when reloading the page
IRBD-903  YSOD xForm- When deleting page from stage and refreshing
IRBD-908  Agenda Section- Various Functionality are not working in Edit Minutes Section Template Format
IRBD-909  Drug Dosage- Typographical error in displaying Name
IRBD-910  Event Type Steps- While creating more than one steps repetition in Agenda Section
IRBD-918  Committee Add/Edit - Empty Committee Name record is getting added
IRBD-920  Study site- Message Email address is being used by another user is shown
IRBD-922  YSOD Location edit - More than 100 characters in Name field
IRBD-924  YSOD User Defined Fields- Hitting update without entering any fields
IRBD-925  Additional study Site Date- MS Word Report has Status & Protocol Code column data flipped
IRBD-929  Study Site Event Edit - Hide Skipped Steps not preserved on Postback
IRBD-930  User Info- Redirect to chosen as New User Registration shows error page
IRBD-932  Study Details Report- Hitting Sponsor(s) Field gives Missing Page Error
IRBD-937  Contact by Department- Email field is missing in generated Report
IRBD-947  User Info- Is Password Expired chosen shows error page
IRBD-950  YSOD StudyEventEdit - Steps: Micro Notes - When entering more than 50 characters
IRBD-952  Edit Protocol Site Expiration Date Notification- Drop down should show the contact email
IRBD-955  Edit Approval Period- Date picker is not present for Expiration date
IRBD-956  Edit Protocol- Time format is displayed in additional site field
IRBD-961  Edit Stage Action- From Address Field Required Validation message needs clarification
IRBD-962  Reset Users Password- Empty field is accepted as Password
IRBD-963  xForm- Duplicate contact is possible in Add contact field
IRBD-964  YSOD create a committee meeting and generate a new agenda- More than 100 character in location field
IRBD-966  xForm questions of type EMail do not show "No Answer Provided" text when empty
IRBD-971  YSOD Edit Pick List Entry- Hit on save and Add Another button
IRBD-979  Add a note- Icons present at top can be copied and pasted inside the note
IRBD-981  YSOD Edit Message- More than 50 character in Message Name field
IRBD-984  Add Attachment- Name does not take extension into account of character limit, if extension not supplied
IRBD-985  MRU Items cannot capture studies with long StudySiteCodes
IRBD-988  User Data- Delete operation cannot be performed for empty Field name
IRBD-993  Edit A Protocol Site Expiration Date Notification- Page Can only be updated when contact is in Recipient AutoCompleteBox w/o Hitting Add
IRBD-994  Protocol Status Maintenance- Status deleted is shown in study
IRBD-995  Study- In send E-mail unwanted content shown in MS
IRBD-1000  Condition Report- Content is not Exported properly
IRBD-1001  Define Agendas Section Template- Alert message for delete is not shown when section name given with quote
IRBD-1003  YSOD xforms- In Action Details hitting submit button without entering any field
IRBD-1011  xForms Edit Form - Required Validation message is not shown fully for New Form Name
IRBD-1012  YSOD xForms- In Question Details selecting Type as Event Output and hitting Add button
IRBD-1013  YSOD xforms-On hitting Add page group
IRBD-1018  View Site Population- Done Button not working if Accessed from Alert Report
IRBD-1026  Edit Protocol- Protocol field is shown empty when protocol given in double quotes
IRBD-1033  YSOD Location edit-When entering more than 10 values in Postal code
IRBD-1035  Departments- Alert message is not shown while deleting
IRBD-1037  xForm- Contact added is not shown when refreshing the page
IRBD-1039  YSOD Edit Message- Entering more than 250 character in message field

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Changes since last release – Enhancements

IRBD-65 Link to Protocol from xform
IRBD-74 Ability to have user defined fields on minutes details.
IRBD-93 Administrative/Staff View of xForm Stages and Activity
IRBD-143 Resetting user's password should unlock the user if they're locked
IRBD-272 Remove silly numbering and cleanup rendering of notes in agenda and minutes
IRBD-288 Admins should have access to dashboard
IRBD-301 User-Defined Fields internal only flag
IRBD-492 Change PS Notification to only show committee list if 'Include' or 'Exclude' is selected.
IRBD-578 Indicate the form version publish date in the header of xForm
IRBD-669  Allow Admin/Staff to maintain collaborators on an xForm
IRBD-684  Add support for PI first & last name and sponsor information to Study Notifications
IRBD-705  xForms - Add option to restrict copy like we do copy for amend
IRBD-743  Enhance New User registration to check for existing user based on email address before allowing creation of new account
IRBD-755  Add support for using an EMail Drop Down in Add Contact stage actions
IRBD-758  Add support for searching for a study-site by UDFs on Study, Study-Site or PI
IRBD-759  Rework Condition Report to allow multi-condition search and export to Excel
IRBD-760  Show the UDF selected for study-details when showing the event in minutes admin too
IRBD-777  Enable option to hide empty folders from non-view-internal users -- default is TO hide
IRBD-785  xForms question type to output the study-site code
IRBD-885  Add ability to use Committee Member question in send email action

Changes since last release – Fixes
IRBD-677  xForm edit should jump back to top of form when there are errors to show
IRBD-679  Pressing 'Enter' while sign form button has focus doesn't "click" the button
IRBD-680  xForm submission page text changed to "Approve" from "Sign" -- change back.
IRBD-681  Some xForm pages still refer to xFormStyle.css -- remove reference
IRBD-683  Pressing enter in the password field doesn't submit the approval page
IRBD-685  Accessing an empty minutes section in compact mode causes BSOD
IRBD-689  Event Resolution Report would omit skipABLE steps in some cases
IRBD-712  In certain situations generate doc action can "forget" the study it should be generating for
IRBD-737  Relace PI on study event doesn't work for PI's added before Aug '12
IRBD-753  Need automated way to confirm success of xForm print in background processing
IRBD-754  UDFs scoped to a specific Minutes section are not available in minutes print format layout
IRBD-757  Entity Role List not correctly refreshed on a client by client basis
IRBD-770  Reviewer study and event list can show deleted study-sites if reviewer still assigned to them
IRBD-778  In certain cases the AfterLogin cookie wouldn't be removed resulting in user being redirected to old page on login
IRBD-799  QTProtocol and SATSendEMail should coordinate to make sure all links are fully qualified.
IRBD-863  Contains conditions [contains any, all, any but...] would fail for AgentTypeOutput questions when multiple values existed
IRBD-887  Attempt to use a committee member question in a condition, when the question gets its committee from a question causes YSOD
IRBD-894  Subject line of study expiration notification (in note only) does not include substitution values -- email itself is fine
IRBD-933  Copy/Version of xForm definition YSOD on new AllowCopy attribute
IRBD-934  Copy/Version of xForm definition doesn't preserve IsReadOnly or HideOnEdit options
IRBD-991  Unable to select a UDF on the SessionUser's Contact