IDhall - Changes in version 4.0.3

New features included since version 4.0.2

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Processing of initiatives

- It is now possible to **enter several sites, services, processes or products targeted by the** same initiative: the "*Initiative scope*" type fields are now multiple value fields.

  Warning *: This change may impact the format of API calls* [API Mod] *referring to the notion of initiative scope. It may also impact the format of text exports of a list of initiatives including scope items.*

- **New "Duplicate initiative" feature**. It consists in creating a new initiative at the draft stage, by using all or part of the data of an existing initiative : plans [Plans module], header image [File upload module], fields "*Context* (...)", "*Initiative description*", "*Expected benefits*", scope, classification [Classification module], risks [Risks module], stakeholders, sponsor, controllers [Financial analysis module], additional members, opportunity analysis, financial analysis [Financial analysis module], implementation details (implementation coordinator, planned dates, priority, estimated workload [Resources module]), action plan (with all tasks including their description and their owners, dates and estimated workload [Mod. Resources]), list of users authorized to see the initiative (if confidential initiative [Mod. Confidentiality]) and summary translations. Original authors can also be included if the user has the right "*Initiatives > Initiative management > Submit a new initiative > Submit initiative on behalf of someone else*".

  This feature requires the new right "*Initiatives > Initiative management > Submit new initiative > Duplicate an initiative* ". It can be accessed from the quick actions menu in initiative lists or in the initiative record. It triggers the opening of a form sequenced in several steps (the number of steps varies according to the application configuration and user rights):

  Step 1: Choose the plan [Mod. Plans]. By default, the original initiative plan is proposed, but it can be modified, or must be modified if the plan is no longer open to new initiatives submission. This preliminary choice of the plan allows the application to define the list of data that can be duplicated according to the chosen plan configuration. This step is not performed if the "Plans " module is not activated, or if there is only one plan available and it is already the plan of the original initiative (no change possible).

  Step 2: Choose the author. By default, the new initiative will be created on behalf of the user duplicating the initiative (this user becomes the author of the initiative). If the user has the right to "*Initiatives > Initiative processing > Submit new initiative > Submit new initiative on behalf of someone else*", he can ask the application to take back the original authors : he will then become the editor of the new initiative. This step is omitted if the user is already the sole author of the original initiative, or if the user does not have the right to submit an initiative on behalf of someone else.

  Step 3: Choice of data to duplicate. The application proposes to the user to choose which data he wants to copy among all the data he has access to, and the functionalities authorized for the destination plan [Mod. Plans] (or in the general configuration if no plan is present). The user can even modify beforehand some of the properties he is about to copy (for instance the targeted organizational units): these changes will only impact the copy, and will not change the original initiative properties. For some dates that cannot be easily modified afterwards, such as dates of financial analysis calculation lines [Financial analysis module] or task dates [Tasks module], the user can ask the application to translate them in time by specifying a new start date for the whole financial analysis or action plan.

When the form is validated, the new initiative is created with all the selected data and is saved at the draft stage. Note that data corresponding to archived elements are not included.

- **Detection of uncompleted fields in an opportunity or pre-analysis analysis before saving.** From now on, when the user presses the "*Save*" button on an opportunity analysis or pre-analysis form, the application checks that all the fields that allow the analysis to be considered "complete" (result/achievability trends and set of evaluation criteria [Mod. Rubrics]) are filled in. When one of these fields is empty, the application sends a dialog box **before saving** indicating that the analysis is incomplete and proposes 2 or 3 actions to the user:
    - *Return to the form*: The user returns to his input and the application puts the focus on the first field not completed detected.
    - *Finish later*: The analysis is saved in the incomplete state. After saving, the user is notified that the analysis is incomplete.
    - *Mark the analysis as completed* (only in the case of a pre-analysis performed in response to a request): The analysis is recorded in the status, either incomplete, and the corresponding pre-analysis request is closed.
- [Mod. E-mail] When a pre-analysis is marked as completed although incomplete, an e-mail notification is now sent to the persons concerned (approver and originator if different) to indicate that a pre-analysis has been completed. Previously, this notification was only sent when a complete pre-analysis was performed.
- Revision of the **relationship between initiatives and selections**. Previously, initiatives assigned to selections were in a binary state: either "*pre-selected (not selected)*" or "*selected*". From now on, the application proposes three statuses for the assignment of an initiative to a selection:
    - *Promotion pending,*
    - *Promotion retained,*
    - *Promotion not retained.*

  To manage these three statuses, the "*Perform selection"* form accessible from the selection has been completely redesigned. Initiatives are grouped according to their promotion status. The status of each initiative can be changed by drag and drop in each of the 3 zones, or via the menu available in front of each initiative. The zone containing the promotion on hold also has two buttons opposite each initiative :✔ to mark the promotion as retained, and ✖ to mark the promotion as not retained. The menu in front of each initiative also allows you to remove it completely from the selection. The list of available actions depends on user rights ("*Initiatives > Initiative management > Preselect initiative into a selection of initiatives*" and/or "*Initiatives > Initiative management > Select initiative into a selection of initiatives*") and on selection status ("*Preselection in progress*", "*Selection in progress*", "*Permanent selection*"). Note that a "promotion on hold" automatically becomes a "promotion not retained" when the selection is closed.
- [Mod. Analysis matrix] The "**Consult opportunity mapping**" or "**Consult opportunity mapping on this plan**" actions [Mod. Plans], available in the quick action menu of the initiative, is now accessible on

initiatives with "*Approved*" status. As a reminder, this action requires all of the following conditions to be available:

- The initiative is not archived, drafted, rejected, implemented or closed,
- The user has the right "*Initiatives > Reports > Initiative opportunity mapping*",
- [Mod. Plans] The initiative is assigned to a plan,
- The opportunity analysis is activated in the plan configuration [Mod. Plans] or in the general initiative management configuration if the "Plans" module is not available.

- The right "***Initiatives > Initiative management >* Request contribution**" given via **relative accesses** ("*Administration > Initiative management > Relative accesses*") is no longer limited to certain initiative statuses depending on the role to which this right is given.

Initiative form

- In the **initiative form configuration** ("*Administration > Initiative management > Initiative management settings*" or "C*onfiguration and initiative processing*" section of a plan [Mod. Plans]), it is now possible to fine-tune the fields to be displayed in the initiative form:
  - When "*Include the scope*" is enabled, it is possible to choose which fields to include in the initiative form : "*Sites targeted by the initiative*", "Organizational units targeted *by the initiative*", "*Processes targeted by the initiative*" and/or "*Products targeted by the initiative*".
  - [Mod. Classification] When "*Include the classification*" is enabled, it is possible to choose which classification fields to include in the initiative form: "*Category*", "Classes" and/or "*Events*".
  - When "*Include Team Members*" is enabled, you can choose which fields to include in the initiative form: "*Sponsor*", "Financial *controllers*" [Mod. Financial Analysis] and/or "*Additional Members"*.
- In the initiative form, the "**Remain anonymous"** option (if authorized in the configuration and initiative processing parameters of the plans [Mod. Plans] or globally) is moved to the "*Author*" / "*Co-authors*" section instead of being an option at the bottom of the form.
- In the initiative form, when the user selects the "**Remain anonymous**" option (available depending on the configuration), the "*Opportunity analysis*" and "*Financial analysis*" sections [Financial analysis module] which would be included in the form are replaced by a message "*To ensure anonymity, the analysis (...) has been disabled*". As this indicates, it is no **longer possible to perform such analyses from the initiative form when anonymity is enabled**. Indeed, since the analyses explicitly show the name of the person who performed them, they expose the identity of people who wish to remain anonymous. However, the user can still perform these analyses by another means than the initiative form, via the initiative's quick action menu or via a contextualized action in the initiative record for example, but his name will then be exposed as the author of the analysis.
- [Mod. Plans] When a user creates a new initiative or modifies one of his draft initiatives, marks his initiative as "anonymous" (if allowed by the configuration), then changes plan and selects one where anonymity is not available, then **a notification dialog box** tells him that **his anonymity choice has**

been removed because it is no longer available. This explicit and unconditional removal of anonymity when selecting a plan where anonymity is not allowed only applies to draft initiatives (or initiatives not yet saved), and only at the initiative form level (and not when using the "*Change plan"* quick action from the initiative record or an initiative list).

- [Mod. Plans] The "**Save and submit**" button on the initiative form is no longer available when a plan is mandatory and no plan is available to the user. The only alternative is "*Save as draft*". In order to explain the reasons for the absence of this button in these conditions, the "Plan" field of the form remains displayed with the mention "*No plan available*" and a warning below indicates that, for this reason, the initiative can only be saved as draft.

Initiative sheet

- **New " Activity bar "** in the initiative sheet, a timeline showing remarkable activities on the initiative over the last 30 days:

  - Processing steps,
  - Opportunity analysis and pre-analysis,
  - Assessments, effectiveness audits [Mod. Effectiveness Audit], contributions,
  - Review,
  - [Mod. Tasks] Task progress points,
  - Implementation progress points (excluding automatic progress points resulting from an action plan update [Mod. Tasks]).

  It can be displayed in two formats : *expanded* (default) - highlighting the action and its author, and *compact* - allowing to reduce the reserved space by displaying only the corresponding action icon. The format can be changed by clicking on the expand/collapse icon to the right of the activity bar.

  It is possible to display the details of a single day by clicking on the time bar at the level of the desired day (provided that there is at least one event on this day).

  By clicking on the icon of an event, a tooltip displays its details (author, comment, etc.).

- [Mod. Files upload] **New tab "Attachments "** in the initiative sheet, represented by the icon . This tab lists all files attached to any initiative element (initiative body, contributions, tasks [Mod. Tasks], processing steps, analysis, etc.), while respecting user visibility rights. This tab is systematically present, even if no attachment is available. The set of files is structured according to the type of element to which it is attached. Within each section, the files are sorted from the oldest to the most recent. Two display modes are available: "*Details*" presents a maximum of information in table form, "*Thumbnails*" displays files as thumbnails with image preview if applicable.

- [Mod. E-mail] For users with the right " *Initiatives > Initiative management > Send message by e-mail > Send e-mail to the team members* " or " *Initiatives > Initiative management > Send message by e-mail > Send an e-mail to any user* ", the " **Send message by e-mail** " action can now be activated via an icon present in the top right corner of the initiative sheet. Note that for space reasons, this icon is not displayed on small screens (smartphone type), unless the " *Send a message by e-mail* " action is the only action available to the user (the icon then replaces the quick actions menu icon, which disappears).

- [Mod. E-mail] For users with the right " *Initiatives > Initiative management > Send message by e-mail > Send e-mail to the team members* ", a link-button " **Send e-mail to the team members** " has been added at the bottom of the " *Team* " section of the initiative sheet ("*Description*" tab).

Action Plan [Mod. Tasks]

- Possibility of **dividing an action plan into customized sections**. The division of an action plan into sections replaces the use of a phase plan: it is therefore not possible to combine the use of sections and a phase plan within the same action plan.

  Sections are specific to each action plan. Although there is no possibility to create "sections templates" per se, which could be reused on several action plans, it is nevertheless possible to create *Action Plan Templates* ("*Administration > Templates and supports > Action Plan Templates*") with customized batches. By applying such a template to an action plan, the latter automatically inherits the list of sections defined in the template. This is equivalent to creating sections templates.

  Unlike phase plans, sections are not considered to be sequenced groups. Therefore, the concept of "section in progress" does not exist, unlike the concept of "phase in progress" when a phase plan is used. Similarly, sections cannot be evaluated or consolidated in reporting ("*Processing statistics - Breakdown of implementations by phase*") or in the search engine.

  The division of an action plan into sections is done directly in the action plan form, by selecting "*Custom sections...*" in the "*Apply a template*" drop-down list at the top of the form, or by pressing the "*Custom sections*" button in the form toolbar when this drop-down list is absent (which is the case when no action plan template or phase plan is defined in the application). The tasks are then preceded by a "*Section Title"* field to be filled in. A "*New section*" button under each group of tasks then allows the creation of additional sections. The different sections can then be sorted manually, using the menu on the right of the title (icon ⋮), then choosing "*Go up"* or "Go *down*". It is also possible to delete an entire section via this same menu: if tasks are already defined for it, the application will propose either to delete these tasks or to reassign them to another section (or no section).

  Note that splitting an action plan into sections is only possible if there is no phase plan imposed at initiative management settings (at general level or at plan level [Mod. Plans]).

  In the *Action plan templates* form ("*Administration > Templates and Supports > Action plan templates*"), a new field "Division of the a*ction plan*" has been added and allows you to choose between using a phase plan or breaking down into sections (or neither). The entry of the different sections is then done on the same principle as for the action plan. The only difference is that it is not possible to delete a section when tasks are defined for it: the tasks must first be reassigned to another section or deleted before the section can be deleted.

- Possibility to display **micro-dashboards for each** action plan **phase or section.** In the "*Action plan*" tab of the initiative sheet, subsidiary information is now displayed under each phase or section title : the extent of its planning (start - end), and its estimated workload if applicable [Mod. Resources].

Under the progress gauge of the phase or section, the actual workload accomplished is also added if applicable [Mod. Resources]. By clicking on one of these new information, the application displays the same micro-dashboards as those presented above for the global action plan:

- **Planning details**, with date of last planning update, planning access link [Mod. Planning] (depending on rights), and timeline to situate progress in time (only for unfinished implementations);
- **Estimated and actual workloads** [Mod. Resources], with - if authorized - access to tools for visualizing the workload allocated to task owners over time;
- *Actual progress* vs. *estimated progress* (if applicable), number of tasks completed / in progress / not started / overdue with ring representation ;
- **Distribution of confidence levels** (if applicable and only for current implementations) ;
- **Last progress update date**, with access to the progress history for the phase or section.

- In the " *Action plan* " tab of the initiative sheet, a **"New" icon** is now present on the right of task progress gauges displayed in "**List**" mode when **the progress has been updated since the last user login**. This same icon has also been added to the right of phase or section progress gauges, when the progress of at least one of the associated tasks has changed since the last user login.

Search of initiatives

- New **sort criterion** "**Progress update date**".
- New columns "**Description**" (of the initiative) and "**Progress update date**" (under the "*Implementation*" group) available for the **"Table"** layout of an initiative list. The "*Description*" column displays only the first 200 characters of the "*Initiative description*" field. To add these columns, select the "*Table" layout* mode in an initiative list, then click on the gear wheel in front of the display mode. Then deactivate the "*Automatic configuration*" mode and choose the column(s) to add. Note that the "*Progress update date* " column will be automatically added when initiatives are sorted by "*Progress update date*" or when a filter is in progress on this field, and when the "*Table" layout* is in "*Automatic configuration*" mode.
- New property "**Progress update date**" available for "**Thumbnail**" layout of an initiative list. To add this property, select the "*Thumbnails*" layout mode in an initiative list, then click on the gear wheel in front of the display mode. Then deactivate the "*Automatic configuration*" mode and check "*Progress update date* " under the "*Implementation*" group. Note that this data is automatically added when initiatives are sorted by "*Progress update date*" or when a filter is in progress on this field, and when the "*Thumbnails*" layout is in "*Automatic configuration*" mode.

Actions monitoring

- Adding the **date of the last update of the action** to the follow-up of the actions to be taken. This is done by :
  - The addition of a "*Last update"* filter to the "*Current actions*" search engine,

- The addition of a "*Last updated*" sorting criterion to the "*Actions in progress*" display,
- The addition of this data to the "*Actions in progress"* text export,
- The addition of this data to the properties available for the "*List"* layout as well as to the "*Table"* layout columns of the "*Current Actions*",
- The addition of this data to the details of each action in the "*Actions in progress*" *dashboard* layout.

This last update date is determined as follows:

- *For initiatives to implement and tasks to perform* [Mod. Tasks] *:* Most recent date between initiative approval and last progress update (initiative/task).
- *For initiatives to be analyzed or awaiting decision :* Most recent date among the last update of the opportunity analysis, the last update of the financial analysis [Mod. Financial analysis] and the creation of the current processing step.
- *For initiatives to be pre-analyzed :* Most recent date between the last update of the pre-analysis and the date of the request.
- *For initiatives to be finalized and initiatives to be further detailed:* Most recent date between the last update of the initiative and the creation of the current processing step.
- *For requests for contributions and requests for effectiveness verification* [Mod. Effectiveness Verification]*:* Date of request.
- *For other actions related to initiative processing :* Creation date of the processing step.

- **New breakdown by "Inactivity time" in the** "**Actions in progress**" **dashboard** layout. This time of inactivity corresponds to the number of days between the *Date of the last update* described above and the current date. To add this new breakdown, simply click on the gear wheel in front of the "*Dashboard"* layout mode, then select "**Breakdown by inactivity time**". As for the other types of breakdown by time, it is possible to choose the consolidation mode: *Rolling durations* (less than 7 days, from 7 to 30 days, from 30 to 90 days, from 90 to 180 days, more than 180 days), *ascending durations* (less than 7 days, less than 30 days, less than 90 days, less than 180 days), or *descending durations* (more than 180 days, more than 90 days, more than 30 days, more than 7 days).
- In the "**Dashboard**" layout of "**Actions in progress",** it is now possible to remove the statistics on delays (number of delays and average delay), in order to optimize the space occupied by the other statistics. This can be done by clicking on the gear wheel in front of the "*Dashboard"* layout mode and then deactivating "**Statistics on delays**". This removal does not affect the breakdown by delay but simply reduces the information presented in the "*Delay"* block of the "*Dashboard*" layout.
- The "**Actions in Progress**" **dashboard** layout now includes by default the **due dates schedule.**

Latest activities

- **Possibility to filter the events displayed in the "Latest activities" block** of the home page. A small menu is now present under the title "*Latest activities*" and allows you to choose the scope of the activities: Followed initiatives, Publications on followed items, Initiatives which I am the author, Initiatives which I am in charge, Initiatives which I am the approver, Initiatives which I am the implementation coordinator, Initiatives which I am the sponsor, Initiatives for which I am the financial controller [Mod. Financial Analysis], Initiatives which I am an additional member, Initiatives which I am the editor, Responses to my requests, My assignments as a team member, Exceptional bonus I received [Mod. Incentive Program], Last update of my user account, Actions I have taken. Only items relevant to the user are present. When applicable, the icon ⚙ is present in front of the different menu items to propose an even finer filter by type of event: New stage, Progress update, New opportunity analysis, etc. Once again, the list of choices offered varies according to the context and the user's rights.

  Note that the filter applied is not remembered for future displays of the home page. If the user leaves the home page and returns later, the selected filter is lost.

  Reminder: This block is only present if it has been added to the list of information to be included on the home page, via "Administration > Application management > Home page - Content" or via "My account - Preferences" by the users themselves according to their rights.

- **New hierarchy of information** in the "*Latest activities*": the title of initiatives is more discreet (reduced font size and grey color), and the description of events is more prominent with a normal font size and color.

- **Reviews** are now included in the "*Latest Activities*" lists.

- [Mod. Task] **Task progress updates** are now included in the "*Latest Activities*" lists.

- The **name of the person who modified the implementation progress of** an initiative is now displayed in the description of this event (except when it is an automatic update induced by the action plan update [Mod. Tasks]).

- Steps taken to **create an initiative in draft mode** are no longer included in the "*Latest activities*" lists once the initiative is published. This helps to alleviate the flow of irrelevant information, especially when the initiative is published just after an initial save as a draft.

User management

- Ability to **delete personal data of an archived user**. A new right "*Users > Administration > Delete personal data*" has been created and is required to access the new "*Delete personal data*" feature. This is accessible via a user's quick actions menu (via a list of users or via their record). It is **only available for users who are already archived**.

  The feature opens a dialog box where the administrator can choose which data to delete. These range from the individual's personal data (name, first name, photo, e-mail, attachment, etc.) to data related to the customization of his use of the application (shortcuts, preferences, etc.). By default, all the data are checked, except those that are not applicable (because they are empty) for the user: these are then presented deactivated. The existence of a name and a connection identifier being required by the application, the functionality proposes to replace these two data by an anonymous string of the form "#Anonymous_ + *{user ID}* + #" for the name (the first name is blank) and "#anonymous + *{user ID}* + #" for the login.

For users with the new right "*Users > Administration > Delete personal data*", a new filter "*Anonymized user*" is added to the user search engine to find all "anonymized" users. A user is considered by the application to be "anonymized" when he or she meets **all of the** following **criteria**:

- Name equivalent to "#Anonymous_ + *{user ID}* + #",
- No first name,
- Login ID starting with "#anonymous + *{user ID}* + #" (the application may need to add a number to the end of the pattern when deleting personal data, in case the ID is already used by another user),
- No external identifier,
- No LDAP binding [LDAP Mode],
- No e-mail address,
- No photo [File Upload Mode].

All users **without a photo and whose name equals the pattern** "#Anonymous_ + *{user ID}* + #" are represented with an avatar with the icon .

<u>Please note:</u> the anonymization of users is irreversible.

- New data added to **a user's statistics** :
  - **Number of pre-analyses** (right "*Initiatives > Items visible > Opportunity analysis > Analysis details > Pre-analyses*" required for the viewing user) ;
  - **Number of Opportunity Analyses** (right "*Initiatives > Items visible Items > Opportunity analysis > Analysis details*" required for the viewing user) ;
  - **Number of financial analyses** [Financial Analysis Mod] (right "*Initiatives > Items visible > Financial Analysis*" required for the user viewing).

  These statistics can be accessed by clicking on the "**Statistics**" link at the bottom of a user's sheet.

- User fields made mandatory by the client (via "*Administration > Users & Access Profiles > User Account Settings*" section "*User Properties*") now remain optional for archived users.

- The "**Borrow another identity**" action, available in the menu of the logged-in user when he has the "*Users > Borrow another identity*" right, is not allowed when the current session is already the result of an identity borrowing. In this case, the action is now visible but disabled (grayed out). In previous versions, the action was not visible at all.

Evaluation Grids [Mod. Rubrics]

- In order to avoid side effects in opportunity or criticality analysis [Mod. Risks], the modification of evaluation units and certain properties of the evaluation scale criteria are now further limited once they are used. These limitations are as follows:

  - **In terms of evaluation units:**

    - The **type of unit** (numerical vs. qualitative) can no longer be changed once the unit is assigned to a **criterion**.

    - **In the case of qualitative units,** no graduation may be added or removed once a (analytical) **measurement** has been made with it. However, the texts can be changed at any time. In addition, a minimum of two graduations is now required to store a scale unit.

    - **For numerical units,** the fields "*Minimum value*", "*Maximum value*" and "*Decimal authorized*" can no longer be changed once the unit is assigned to a **criterion**.

  - **In terms of the criteria for the evaluation scales :**

    - The fields "*Minimum value*", "*Maximum value*" and "*Decimal places allowed*", which are available for criteria based on a numerical unit, can no longer be changed once an **measurement has been** performed on this criterion.

Risks [Mod. Risks]

- It is now possible to **enter several sites, services, processes or products** in the **scope** of a risk. Indeed, to echo the change implemented at the initiative scope level, the fields of a risk scope become multiple value fields.

  [Warning*: This change may impact the format of API calls referring to the notion of risk perimeter.*

PDF Exports [Mod. PDF Export]

- [Mod. Planning] **Optimization of initiative or task title display** [Mod. Tasks] **in PDF export of schedules** ("Implementation *schedule*" report or action plan schedule export in PDF export of initiative content [Mod. Tasks]). From now on, the space reserved for displaying headings can occupy up to 33% of the page width, against 25% previously, thus increasing the number of visible characters.

  Moreover, in these two exports, it is now possible to choose the location of the titles of the various items of the schedule: "**To the left of each line**" (by default, as in the previous versions), or **"Above each line**". When the titles are displayed above each line, this increases the space occupied in height by the schedule, but also increases the space available for the display of the titles which can then occupy 100% of the width of the page. The choice of the position is made :

  - *For the export of the "Implementation schedule" initiative report:* By clicking on the "*Options"* link of the PDF export dialog box, different options are displayed. Those concerning the implementation schedule are present at the bottom of the form.

- [Mod. Tasks] *For PDF export of action plan schedule : When* configuring PDF export of one or more initiatives content, the option to position titles is present in the "*Action plan > Schedule*" section.

Access rights

- The "**Initiatives > Initiative management > Modify scope**" right is now divided into 4 sub-rights:
    - *Change initiative's targeted sites,*
    - *Change initiative's targeted organizational units,*
    - *Change initiative's targeted processes,*
    - *Change initiative's targeted products.*
- [Mod. Plans] The "*Initiatives > Plans & domains > Rate of initiatives assigned to a plan*" report now requires the new right "**Initiatives > Reports > Rate of initiatives assigned to a plan**". When upgrading, all profiles having at least one "*Initiatives > Reports*" right get this right to avoid any regression compared to previous versions, where no specific right was required to access this report. This automatic assignment is done under the condition that there is at least one non-archived plan in the application at the time of the upgrade. The client can later withdraw this new right from the profiles that obtained it, if he wishes to withdraw the " *Rate of initiatives assigned to a plan* " report from all or part of the users.

LDAP Synchronization [Mod. LDAP interfaceode]

- [Mod. Directory synchronization interface using files] The import of **LDAP DNs** of sites, services, processes or users, which are necessary to establish a link with an LDAP directory, is now possible **via the file-based directory synchronization interface**. In the configuration of the interface ("*Administration > Directory synchronization using files > Imported files settings*"), it is now possible to configure, for the sites, services, processes and/or users :
    1. The name of the column that will contain the LDAP DN in the imported files,
    2. The name of the column that will contain the IDhall ID of the corresponding LDAP interface (applicable only if multiple LDAP interfaces are used within the application),
    3. The default LDAP interface to use when no specific data is present in the imported files.

  These new settings are only available if there is at least one LDAP interface configured to synchronize sites, services, processes or users. If only one interface is configured, then fields 2 and 3 above are not offered: the link will necessarily be made with the single existing interface.

API [Mod. API]

- **New services available** for the management of **memos and tags of an initiative**:
    - *Get the memo of an initiative*

- *Define a memo for an initiative*
- *Delete an initiative memo*
- *Get the tags of an initiative*
- *Define the tags of an initiative*
- *Add tags to an initiative*
- *Remove tags from an initiative*

As a reminder, tags and memos are personal. It is thus a question here of managing the tags and memos on behalf of the user calling the API.

The "*Initiatives > Notes > Memo"* right is required to access the services related to memo management.

The "*Initiatives > Notes > Tags*" right is required to access the services related to tag management.

- [Mod. Tasks] **New services available** around the handling of the **action plan**:
  - *Get the tasks of an action plan phase*
  - *Get the list of sections defined for an action plan*
  - *Get the tasks of a section from an action plan*
  - *Specify the phase plan of an action plan*
  - *Define the sections of an action plan*
  - *Add a section to an action plan*
  - *Define the tasks of an action plan phase*
  - *Define the tasks of an action plan section*
  - *Delete a section from an action plan*
- [Mod. Incentive program] **New services available** around the management of **accounts from the incentive program**:
  - *Obtain account information from the incentive program* ("*Incentive program > Account inquiry*" or "*Incentive program > Debit points*" right required): this service allows you to see the number of points earned, debited and remaining for a user.
  - *Debit points to an account from the incentive program* ("*Incentive program > Debit Points*" right required).

Security

- *Blowfish* becomes the **new algorithm used for storing passwords** and replaces SHA-1. This only applies to new passwords that will be stored after the switch to the new version of IDhall. Indeed, since encryption is irreversible, currently stored passwords (encrypted via SHA-1) cannot be decrypted to be re-encrypted with a new algorithm.

  For clients using the classic IDhall authentication (outside SSO), it may be appropriate to mark all passwords as expired in order to force users to change their passwords and thus benefit from the new encryption algorithm, which is much more robust than SHA-1. This can be done via "*Administration > Application connection > Authentication Policy*", section "*Password Management*": then just click on the link "*Force all users to change their password*", confirm the dialog box, and save.

Ergonomics

- To facilitate access to the shortcuts in the search engines (in the "*Explorer*", "*Reports*" and "*Administration"* sections), a sentence "*Compose a new search or use a shortcut*" or "*Compose a new report or use a shortcut*" now precedes the "*Advanced search*" or "*New report"* title-button, which opens the menu where the shortcuts are located. Moreover, clicking on this sentence automatically opens this menu. Note that this sentence is only present if there is at least one shortcut.

Terminology

- [Mod. Tasks] The term "**Project**", present in some expressions, is now replaced by the term "**Action plan**".

- [Language EN] "**Search settings**" becomes "**Search parameters**".