



UNDERDOG MINOR RELEASE NOTES

RELEASE DATE: March 28th, 2026

NEW FEATURES & FUNCTIONALITY

The Underdog Minor release is aimed to implement key security requirements and functional enhancements to the platform. Primarily this release intended to merge CASA changes to main BRICS branch and to deliver key administrative compliance features. Additionally, it covered additional items such as: redesigned account creation workflow and several usability improvements within the Account Management module. It also delivers key security enhancements, refined permissions, and study-level access controls within the Data Repository. The Meta Study module has been renamed to Datastore, with updated access, roles, and permission structures, along with a refreshed UI design. Additional minor updates across the Tools module.

Account Management Module:

1. **Administrative Policy Account Management Enhancements** Several improvements were made to support administrative policy processes, including:
 - a. Updates to **account request privileges**.
 - b. Addition of **new document types** such as **Validation Email, Progress Report, and Closeout Report**.
 - c. Ability to **create, view, and download webform versions** of the **Data Access Progress Report** and **Data Access Closeout Report**.
2. Enhanced the **file linking workflow** by updating file modals to allow users to associate files (e.g., **DUA documents**) with specific studies.

Data Repository:

1. Implemented **administrative policy-aligned controlled access** for studies, including configurable access expiration dates.
2. Restricted **study permission management** to **System Administrators** only.
3. Synchronized access expiration dates across both the **Repository** and **Account Management** modules to ensure consistency and compliance.

Datastore (formerly called Meta Study):

1. Renamed the **Meta Study** module to **Datastore**.
2. Added **administrative policy-compliant controlled access** for studies, supporting both **Admin** and **Regular User** views.
3. Introduced **access expiration management**, with linked expiration dates across **Datastore** and **Account Management**.

NTRR Enhancements:

1. Introduced the ability to **select a Resource (FITBIR or NTRR)** when creating **GUIDs, Data Elements, Form Structures, Studies, and Meta Studies**, provided the user has **Meta Data Creation** permissions for both resources.

2. Ensured that when assigning one or both resources to a **Form Structure**, **all associated Data Elements automatically inherit the same resource assignments**.
3. Enabled **Cross-Resource Data Creation** within the Dictionary for Form Structures.
4. Updated the system to **auto-populate Study and Meta Study IDs** based on the resource associated with the user's account.
5. Implemented a new permission called "**Meta Data Creation**", allowing users to manually select the applicable resource (FITBIR/NTRR) across all supported modules.
6. Added support to specify **Resource** in the **Form Structure import template**.
7. Added the ability for **Admins** in the Data Repository and Data Store (Meta Study) modules to **change the Resource** of a Study or Meta Study.

Automated Email Notifications:

1. Implemented automated email notifications to alert users of **upcoming Data Access Request (DAR) and Data Use Agreement (DUA) expirations**, as well as notifications sent **after the expiration deadline** to ensure users remain informed and compliant with access timelines.

Miscellaneous:

1. Delivered **minor enhancements** to the **Submission Tool** and **Tools** module to improve usability and performance.
2. Added the ability to **link DOIs from external repositories** within both the **Data Store** and **Data Repository** modules, supporting better data referencing and traceability.