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Oracle Life Sciences Site Select

Release Notes

Release 26.2

G58736-01
September 2026

Oracle Life Sciences Site Select Release Notes, Release 26.2

G58736-01

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Release 26.2

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

- What's new
  Planned enhancements in release 26.2 include multiple performance and usability improvements.
- Service notice

What's new

Planned enhancements in release 26.2 include multiple performance and usability improvements.

- Performance enhancements
  This release includes significant performance enhancements that improve application responsiveness.
- Communications
  When you invite a site to a study, Oracle Site Select now uses each site user's first and last name from the study site instance, and you can now include the Study information file in site invitation emails.
- Document management
  You can now delete document labels that aren't associated with a workflow task or investigator document.
- Feasibility surveys
  Feasibility survey updates prevent duplicate response versions for identical survey responses and make unanswered questions easier to identify in Oracle Site Select and exported PDFs.
- Site grid
  Site grid updates improve navigation, invitations, exports, previews, and row refreshes while reducing unnecessary processing.
- Site portal
  The survey completion page branding now shows the Site portal logo instead of Select LITE.
- Site profile
  Site profile updates improve navigation, performance, and consistent staff type display across Oracle Site Select and the Site portal.
- Site workflow tasks
  Workflow task enhancements add reminders, direct document template uploads, accurate task dates, and site workflow history for easier task management and review.

- Study management
  The study drop-down has improved user interaction, you can specify site profile type when adding a study from My Dashboard, and the Site counts and cycle times dashboard lets you export in CSV, Excel, or PDF format.
- User interface
  The global navigation menu has new tooltips, your account administrator can now specify custom link text if your organization uses a custom support URL, and footer text now meets accessibility guidelines.

Performance enhancements

This release includes significant performance enhancements that improve application responsiveness.

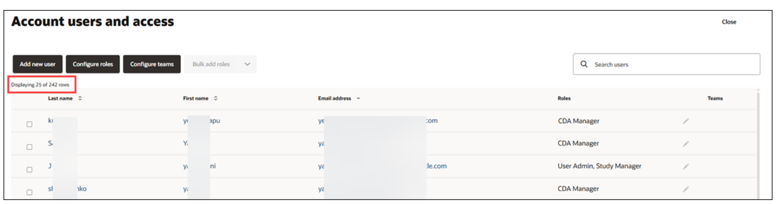
List pagination

Several Select lists now use load-on-scroll to reduce initial data load time and improve responsiveness for large result sets. Instead of retrieving the full list at once, each page loads a smaller initial set and retrieves additional records as you scroll. A Displaying # of # rows counter shows how many records are currently visible and the total number available.

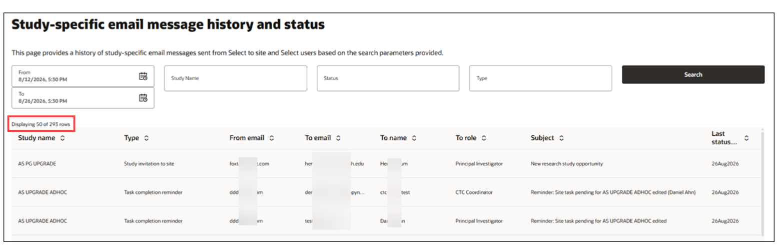
The initial result size varies by page. For example, the Account Users and access list initially loads one page (25 rows) of results, while Email History initially loads the first 50 records. Site communications and Document submissions also load smaller, paged result sets rather than the full collection. The row counter appears at the upper left for Users and access, Email history, and Site communications, and at the lower left for Document submissions.

Existing search, filtering, sorting, permissions, and other page-specific behavior remain available. Site Communications loads complete message history only when you open a thread, and Document Submissions loads additional document details, such as history and files, only when you open a submission.

Account users and access

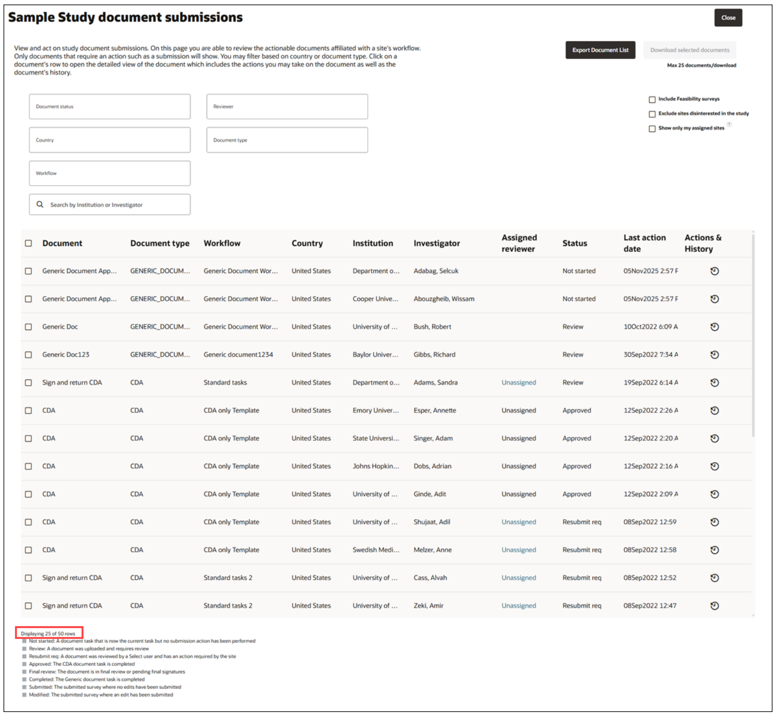


Email history and status



Site communications

Document submissions



Infrastructure performance and scalability updates

Across the Study picker, Site grid, Site details drawer, Network profiles, and Data source areas, data retrieval is more efficient through reduced and consolidated requests, server-side pagination and search, and smaller result sets. These changes reduce unnecessary processing and data loading while preserving existing access, filtering, sorting, and workflow behavior.

These are the infrastructure improvements in this release:

- **Study picker**: The study picker now performs more efficiently for accounts with a high number of studies. You can search for a specific study, access your favorite studies at the top of the list, or load and view all studies when needed.
- **Site grid**: Performance is improved by eliminating duplicate data requests when the grid first loads. The grid now reuses the initial page data where possible, reducing unnecessary backend processing and response data while maintaining existing sorting, filtering, pagination, bucket changes, and refresh behavior.

- **Site grid bucket counts**: Landing page and site grid performance is improved by consolidating multiple bucket count requests into a single request. This change reduces unnecessary backend processing while continuing to return accurate counts for nomination, screening, selection, finalization, and processing based on your access.
- **Site grid data request**:Site grid loading now reuses study information that has already been retrieved, rather than requesting it multiple times. This reduces unnecessary processing during initial load while keeping workflow configuration, selectable columns, country-specific behavior, and refreshed study data up to date.
- **Site details drawer**: Performance is improved by preventing duplicate activity requests and delaying workflow-specific requests until valid workflow information is available. Workflow changes and activity updates now refresh shared activity data once, while existing task, document, file, and status behavior remains unchanged.
- **Network profiles**: Network Profile management now retrieves profiles in server-paginated results, reducing the amount of data loaded at one time for accounts with large profile lists. Search and filtering run server-side, and complete profile details load only when you open or edit a profile. Existing create, edit, delete, status, validation, site assignment, and site-drawer selection behavior remains unchanged.
- **Data source query**: Investigator and Trial queries now use server-side pagination instead of fixed result limits, allowing you to access larger investigator, trial, and site result sets without loading excessive data at once. Search and filtering on the Data source query page continue to respect existing account, permission, and data-source constraints, and you can select records and create study sites from any results page.
- **Data source matches**: The Account data source management page now loads only the requested page of results for the active Matches tab instead of retrieving all match categories at once. Search, sorting, and match-category filtering are applied server-side, reducing unnecessary data loading while preserving the existing paired-match display and authorized visibility for global, admin, and non-admin users.
- **Data source retrieval**: Data-source catalogs now use server-side search and pagination to avoid loading the full list when you open Study data sources, Account study details, Account data sources, or Oracle data sources, reducing initial data retrieval and browser processing for accounts with large catalogs. This enhancement does not change the user interface; the existing page layout, controls, and workflows remain the same, including viewing, adding, removing, prioritizing, and saving data-source assignments.

Communications

When you invite a site to a study, Oracle Site Select now uses each site user’s first and last name from the study site instance, and you can now include the Study information file in site invitation emails.

Study invitation names match site records

When you invite a site to a study, Oracle Site Select now uses each site user’s first and last name from the study site instance. The site instance contains the merged site data that you see in the site grid and site profile.

Previously, if a site user had been invited to another study, Oracle Site Select could use the user’s name from their Site portal account profile. As a result, the name on the site details drawer Invitation and site status tab or the study invitation email could differ from the name displayed in the site grid.

Oracle Site Select now uses the site instance name on the Invitation and site status tab and in invitation email placeholders for site contacts, such as the principal investigator, clinical trial coordinator, institutional review board contact, and other site users. Changes to the user’s Site portal account profile no longer determine the name used for a study invitation.

> **Note**
>
> For the invitation name to match the site profile, the site profile must be the highest-priority data source for the study. If another data source has a higher priority, the merged site instance may use a name from that data source.

Example 1

A principal investigator is listed as **Alex Morgan** in the site grid for Study1. The same person’s Site portal account profile lists the name **Alex Reed**.

Previously, when you invited the site, the site details drawer Invitation and site status tab and the invitation email could display **Alex Reed**, even though the site grid displayed **Alex Morgan**. If the Site portal profile name changed again before you reinvited the site, the next invitation could display the newly edited profile name.

With this enhancement, the invitation uses **Alex Morgan**, the name from the Study1 site instance. The site details drawer Invitation and site status tab, the invitation email placeholders, and the site grid display the same name.

Example 2

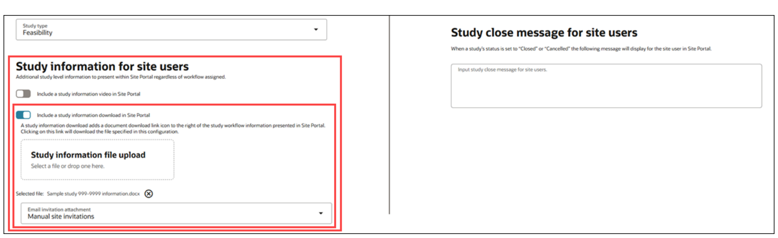
If you update the principal investigator’s name in the Study1 site profile to **Jordan Lee**, and the site profile is the highest-priority study data source, the site grid and subsequent invitations display **Jordan Lee**.

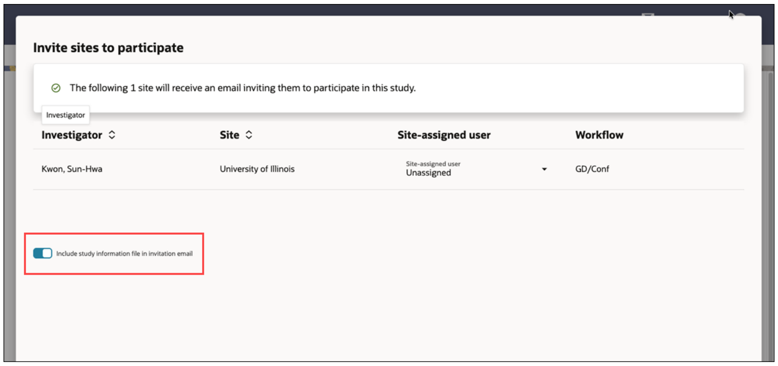
Study invitation file attachment

You can now include the Study information file in site invitation emails, giving site users direct access to the study information when they receive their invitation.

When the Study details page has the “Include a study information download in Site Portal” setting turned on, and a file is attached, a new Email invitation attachment setting lets you choose Automatic site invitations or Manual site invitations. For automatic invitations, Oracle Site Select attaches the file to the invitation email. For manual invitations, the Invite sites to participate modal includes a toggle to attach the file. The toggle is on by default, but you can turn it off before sending the invitation.

When the Include a study information download in Site Portal setting is turned off on the Study details page, or no file is attached, Oracle Site Select doesn’t include a study information file with invitation emails. The existing invitation subject, body, recipients, and links remain unchanged.





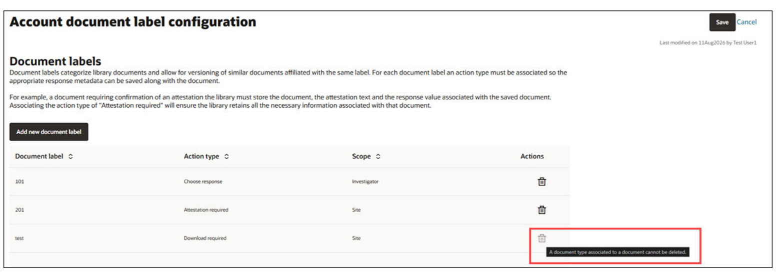
Document management

You can now delete document labels that aren't associated with a workflow task or investigator document.

Document label deletion

If you have permission to define document labels on the Account document label configuration page, you can now delete a document label that isn't currently associated with a workflow task or investigator document. To remove an unused document label, click the enabled delete icon .

If a document label is in use, the label value and the delete icon are both disabled. When you hover over the delete icon, the following message displays: A document type associated to a document cannot be deleted.



Feasibility surveys

Feasibility survey updates prevent duplicate response versions for identical survey responses and make unanswered questions easier to identify in Oracle Site Select and exported PDFs.

Duplicate surveys

Oracle Site Select now prevents duplicate survey response versions when a site submits or resubmits a single-page or multi-page survey without changing any answers.

Previously, duplicate webhook notifications or unchanged resubmissions could create additional survey versions. Oracle Site Select now creates a new response version only when at least one answer changes, and the first survey submission creates only one version.

No answer survey response

If you have permission to view and export survey responses, unanswered single- and multi-response questions now display “No response provided” when you open a submitted survey response in Oracle Site Select.

When you export or download the completed survey as a PDF, unanswered single-response and multi-response questions display “No response.”

Site grid

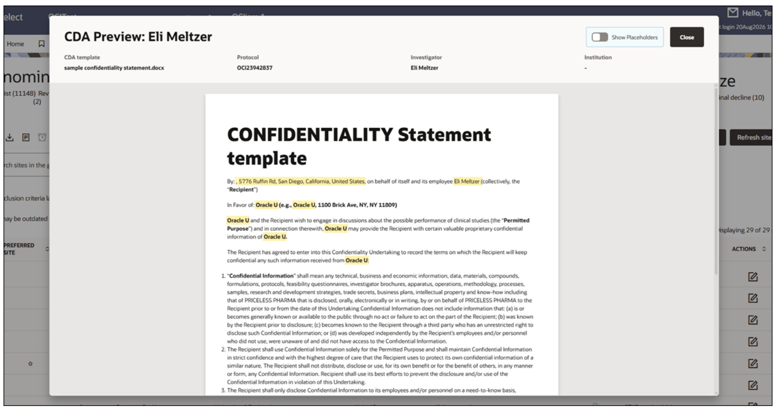
Site grid updates improve navigation, invitations, exports, previews, and row refreshes while reducing unnecessary processing.

CDA template preview in Short list

You can now preview a site’s CDA directly from the Evaluate > Short list site grid before sending an invitation, making it easier to verify the document and its site-specific content. For example, you can check the merged fields/placeholder values to confirm what will be sent is as expected.

A new default CDA Template column displays a clickable icon that opens a read-only preview of the CDA for the selected site. By default, the preview displays the CDA with site-specific values populated and highlighted to make them easy to locate in the document. Use the Show Placeholders toggle at the upper right of the preview window to switch between the populated values and their corresponding CDA placeholder tokens. Closing the preview returns you to the Short list site grid with your existing grid context preserved.

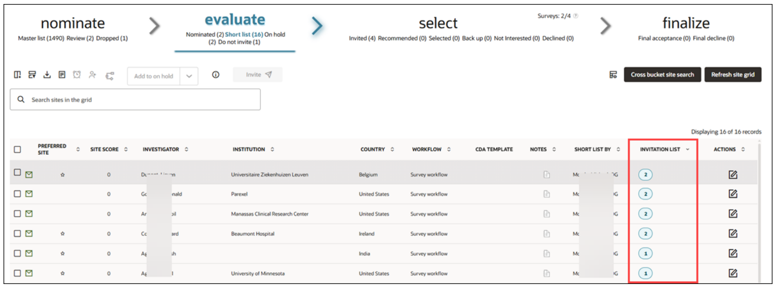
Preview is available only for DOCX and PDF files. If the latest template uses another file type, such as ZIP or XLS, the preview window displays the text: "Preview is not supported for this file type."



Invitation list review in Short list

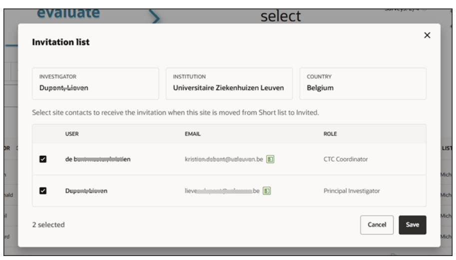
You can now review and update a shortlisted site’s invitation recipients before moving the site to Invited. This enhancement helps ensure the correct existing site contacts receive the study invitation.

An optional Invitation list column is now available for the Short list site grid. When added, each site displays a numeric badge showing the number of saved invitation recipients. By default, the initial recipients are based on the study-level recipient settings under Email templates > Study-wide email template settings > Recipients.



Click the badge in the Invitation list column, or select Actions > Manage recipients, to open the Invitation list modal and select or deselect existing site contacts. You cannot add new contacts from this modal.

Click Save to store the selected contacts as that site's invitation preference for the study. When you move the site from Short list to Invited, Oracle Site Select sends the invitation to the saved recipients. The same saved recipients are also carried forward to the Resend invite modal if you reinvite the site.

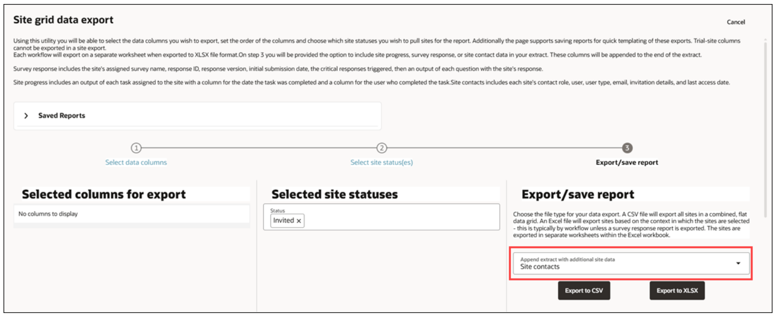


Study level site contacts export

You can now include site contact information when exporting site grid data, allowing you to download site and contact details together in a single file. This option is available when creating the Site grid data export from the Oracle Site Select and Finalize buckets.

Under Export/save report, the export option is now labeled "Append extract with additional site data," and it includes a new Site contacts option. When selected, the export includes one row for each site contact and repeats the applicable site-level data for each contact. Contact details include the site contact role, name, user type, and email address, along with available invitation and access information. Sites with multiple contacts include a row for each contact, and sites without contacts remain in the export with blank site contact fields.

If you save an export configuration that includes Site contacts, Oracle Site Select retains that selection and applies it automatically when you reuse the saved export.



Site scoring for inactive sites

To improve site grid performance, Oracle Site Select no longer recalculates site scores when your study has a status of On Hold, Feasibility Complete, Closed, or Cancelled. Previously, changes to Master list criteria filters could trigger site score recalculation for studies in these statuses.

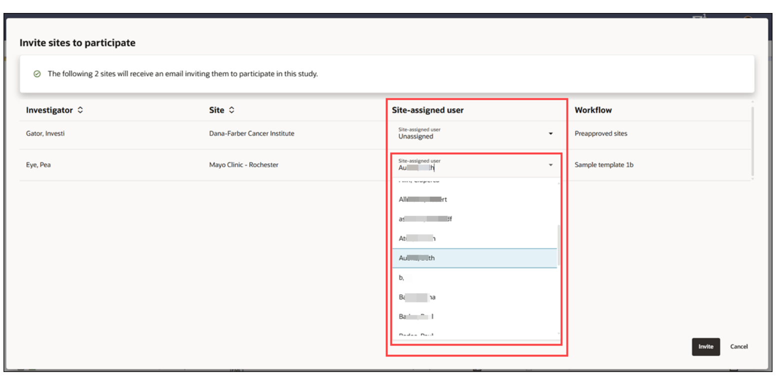
If you make a scoring-related change before or while the study is inactive, Oracle Site Select retains the pending recalculation until you return the study to an active status (i.e., Active or In Setup). Oracle Site Select then recalculates the site scores using the current criteria and configuration. Returning the study to an active status doesn’t trigger recalculation unless a scoring-related change is pending.

If your inactive study has Master list criteria configured, the site grid displays the following message: Site scores may be outdated because this study is not in an Active customer status. Additionally, the site grid won’t display the Site scoring is being processed message, and the Site Score column doesn’t display Pending while score generation is skipped.

Invite modal shows Site-assigned users

The Invite sites to participate modal now includes a Site-assigned user column that displays the person currently assigned to each listed site. Before sending the invitation, you can review and update the assigned user directly in this column. Click the Site-assigned user field to open a drop-down list and select a user to assign to the site.

If you change the site-assigned user and click Invite, Oracle Site Select saves the updated assignment before continuing with the invitation process. If you don’t change the assigned user, or if the Site-assigned user field is blank, the invitation process continues as before.



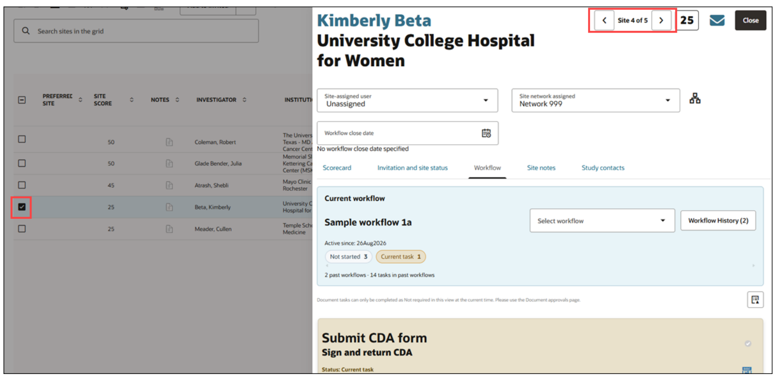
Site details drawer navigation

You can now review multiple sites more efficiently without repeatedly closing and reopening the site details drawer. Previous and next navigation controls at the top of the drawer let you move through the current site grid results while keeping the drawer open. A site position indicator (e.g., "Site 4 of 5" in the screenshot below) shows where the current site appears in the grid.

Use the previous and next navigation controls to move through sites in the existing grid order while preserving the current workflow bucket, filters, search terms, sort order, and loaded results. The site grid remains visible in the background, and the selected row updates to match the site shown in the drawer.

As you move between sites, the drawer updates all site-specific details, including the site name, institution, assigned user, site network, workflow close date, tabs, notes, workflow history, and study contacts.

The previous or next control is disabled when you reach the first or last site. Closing the drawer returns you to the same site grid context.



Site grid row refresh

Instead of refreshing after every user action, the site grid now refreshes only when necessary (i.e., after a change that affects information displayed in the grid). This reduces unnecessary loading during normal workflows and helps you save time. This enhancement also lets you confirm relevant updates immediately without reloading the full grid or losing your current filters, sorting, pagination, scroll position, or site selections.

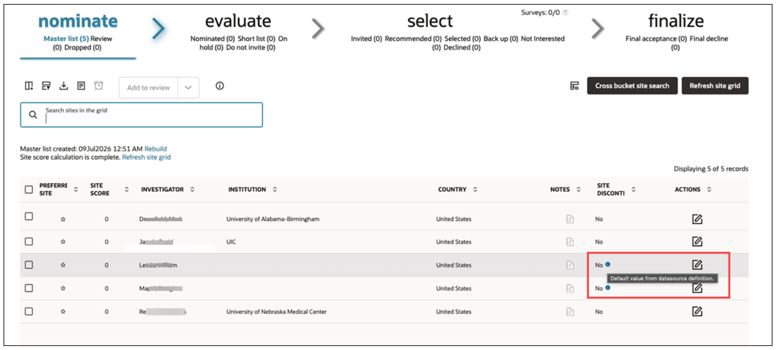
Row updates apply to grid-visible changes such as assignments, workflow or task status, workflow close date, invitation status, survey results, and document status. When you make changes to automatically updated fields, you won't see the "Refresh the site grid to see saved changes" text below the close button in the site details drawer. Selected sites remain selected in the site grid after bulk workflow assignment or failed invite action. This is expected behavior.

Changes that aren’t represented in the grid, such as site notes or study contacts, don’t trigger a row update. Canceled or failed actions, as well as opening or closing the drawer without saving a relevant change, leave the grid unchanged.

Default Boolean column value

When an imported site record doesn’t include a value for a standard discontinue column, the site grid now displays the default value defined for that column. The displayed value also indicates that it came from the data source default rather than from the imported record.

This behavior applies to Site Discontinue, Institution Discontinue, and Investigator Discontinue columns. For example, if one of these columns has a default value of false and the imported record contains no value for it, the site grid displays false.



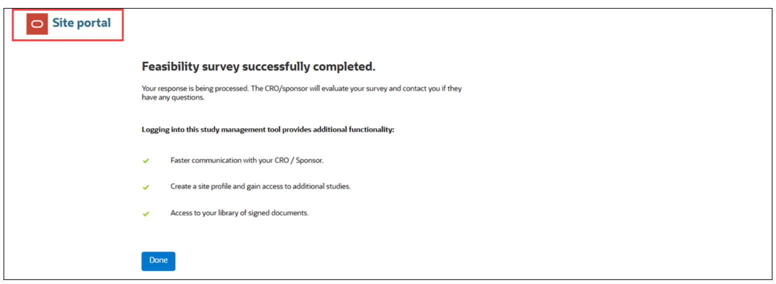
Site portal

The survey completion page branding now shows the Site portal logo instead of Select LITE.

Survey completion page

In release 26.1, we made a minor branding update to the survey completion page in the Site portal. When a site user completes a survey, the page now displays Site portal branding instead of Select LITE branding.

The existing survey completion message and Done button continue to work as before.



Site profile

Site profile updates improve navigation, performance, and consistent staff type display across Oracle Site Select and the Site portal.

Pinned action bar

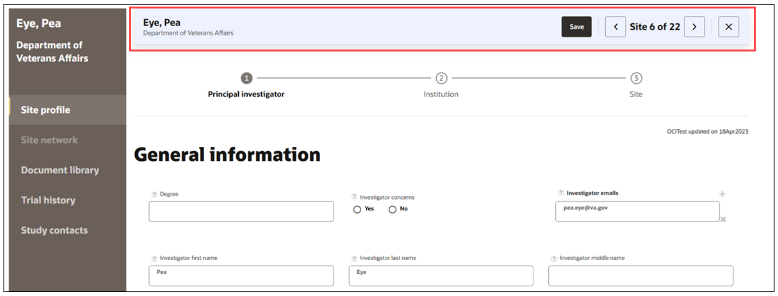
A new pinned action bar keeps key actions available at the top of the Site profile, allowing you to navigate profiles more efficiently.

Scenario 1: You open a profile from the site grid

The Site profile now includes a pinned action bar with options to Save, move to previous site, move to next site, a position indicator, and close. The bar remains visible as you scroll and replaces the previously available Save progress, Save and next, and Save and complete buttons on site profile pages. The position indicator shows where the current site appears in the site grid result set, such as Site 2 of 8.

Use the previous site or next site arrows to move through sites in the current grid order without returning to the grid. Navigation respects your existing filters, search terms, sort order, bucket, and loaded results. The previous or next control is disabled when you reach the beginning or end of the list. Save will save changes across the site profile and keep you on the current site.

If you have unsaved changes and select previous site, next site, or close, you'll be prompted to Save, Discard, or Cancel your changes. Closing the profile without unsaved changes returns you to the site grid, preserving your existing grid context.

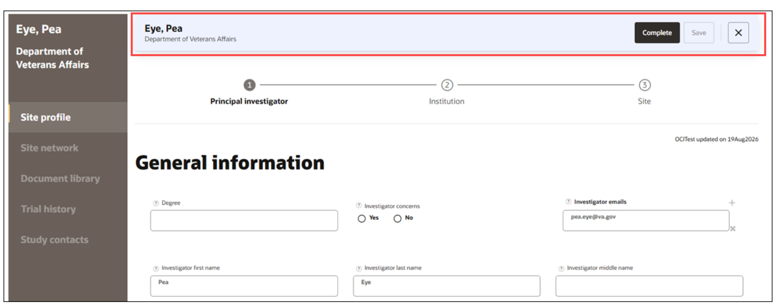


Scenario 2: You open a site profile from the Verify site profile information workflow task

The pinned action bar provides Save, close, and, when available, Complete buttons. Previous and next site buttons aren't applicable when you open the site profile from the Verify site profile information workflow task, so you won't see them in this scenario.

Clicking Save will save your profile changes without completing the Verify site profile information task. It keeps you on the Edit site profile page.

If the Verify site profile information task hasn't been completed yet, the Complete button is available; click it to complete the task. Clicking Complete or closing the profile when there are no unsaved changes returns you to the Workflow tab in the site details drawer. If you select Close when you have unsaved changes, you'll be prompted to Save, Discard, or Cancel your changes.



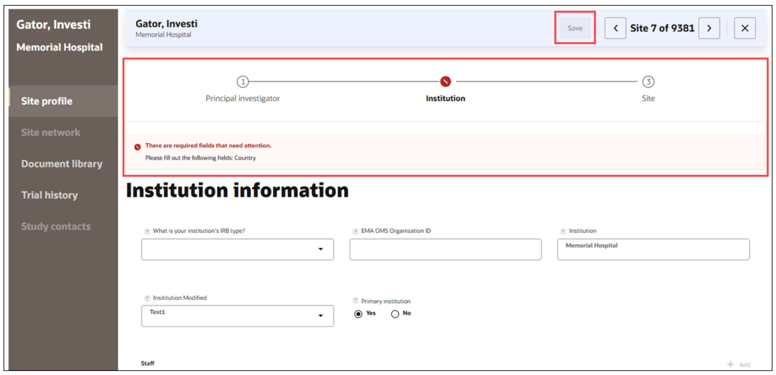
Train navigation

You can now move between site profile pages more easily using horizontal train navigation at the top of the profile. The train includes the following items: “1 Principal investigator,” “2 Institution,” and “3 Site.” The item numbers are simply a design element; you can navigate the pages in any order you prefer (e.g., click 1 Principal investigator, then click 3 Site, then 2 Institution).

Clicking a train item opens the corresponding profile page for the current site. As you move between profile pages, “Site profile” remains highlighted in the left navigation menu. The menu includes all previously available top-level site areas defined in your organization’s configurable site profile.

If you make changes in the site profile and click on another train item, your unsaved changes are preserved. Clicking Save on any site profile page saves unsaved changes across all profile pages. If you try to close the profile or navigate to another site while unsaved changes remain, you’ll be prompted to Save, Discard, or Cancel those changes.

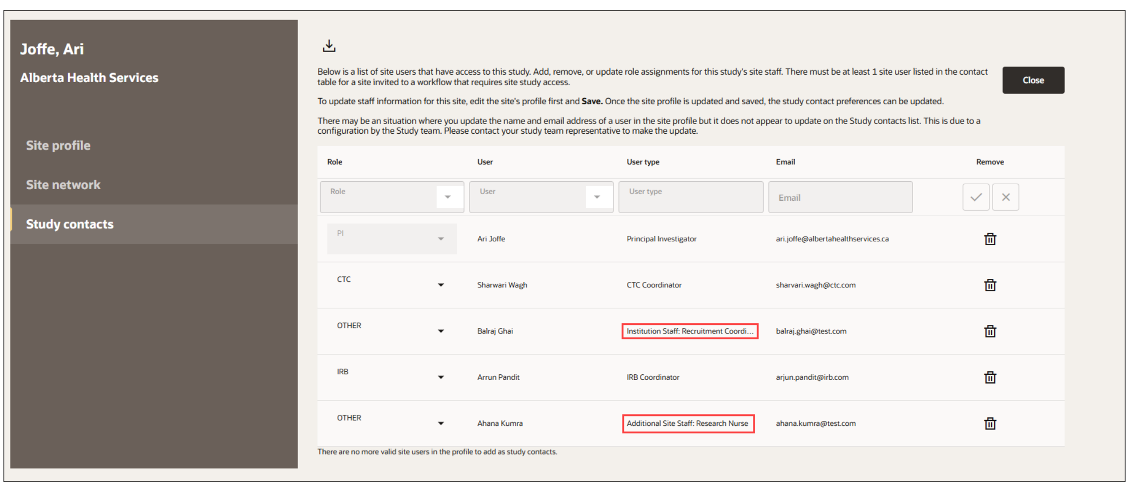
If a page has no information in a required field, the train item number changes to an error icon and a message displays the field(s) that must be populated to save the profile. By design, the Save button in the pinned action bar will be disabled until you populate the required field.



Institution staff user type

Staff types now display consistently across Site Portal and Oracle Site Select, preserving the exact text and capitalization entered. This update applies to the Institution Staff and Additional Site Staff values.

When a site user enters and saves custom staff types in Site portal, the values display as entered in the Contacts section of the Edit Site Profile page. When these values are entered in Oracle Site Select, the same text appears in Study Contacts, Invitation and Site Status, and Study Email History and Status.



Oracle Site Select also displays customer-facing names, instead of database names, for standard site profile user type values. This means PI displays as Principal Investigator, TRIAL_COORDINATOR displays as CTC Coordinator, IRB_COORDINATOR displays as IRB Coordinator, ADDITIONAL_SITE_STAFF displays as Additional Site Staff, INSTITUTION_STAFF displays as Institution Staff, and NETWORK_DELEGATE displays as Network delegate.

Site profile optimization

We improved site profile performance for studies with large custom site profile configurations, helping profiles load and respond more efficiently when many fields are configured.

These updates reduce unnecessary rendering and data retrieval when you open a site profile or move between profile tabs and domains. Existing required-field validation, completion indicators, Save, Cancel, and read-only behavior continue to work as before.

Site workflow tasks

Workflow task enhancements add reminders, direct document template uploads, accurate task dates, and site workflow history for easier task management and review.

Task completion reminders

If you have the new *Send task reminders* permission introduced in this release, you can now send reminder emails directly from eligible pending workflow tasks. The Send reminder option appears in the workflow task Action menu when the task is pending and doesn't have a start at date.

For chained workflows: The Send reminder action is shown only for the Current task because the tasks will be completed in a configured order.

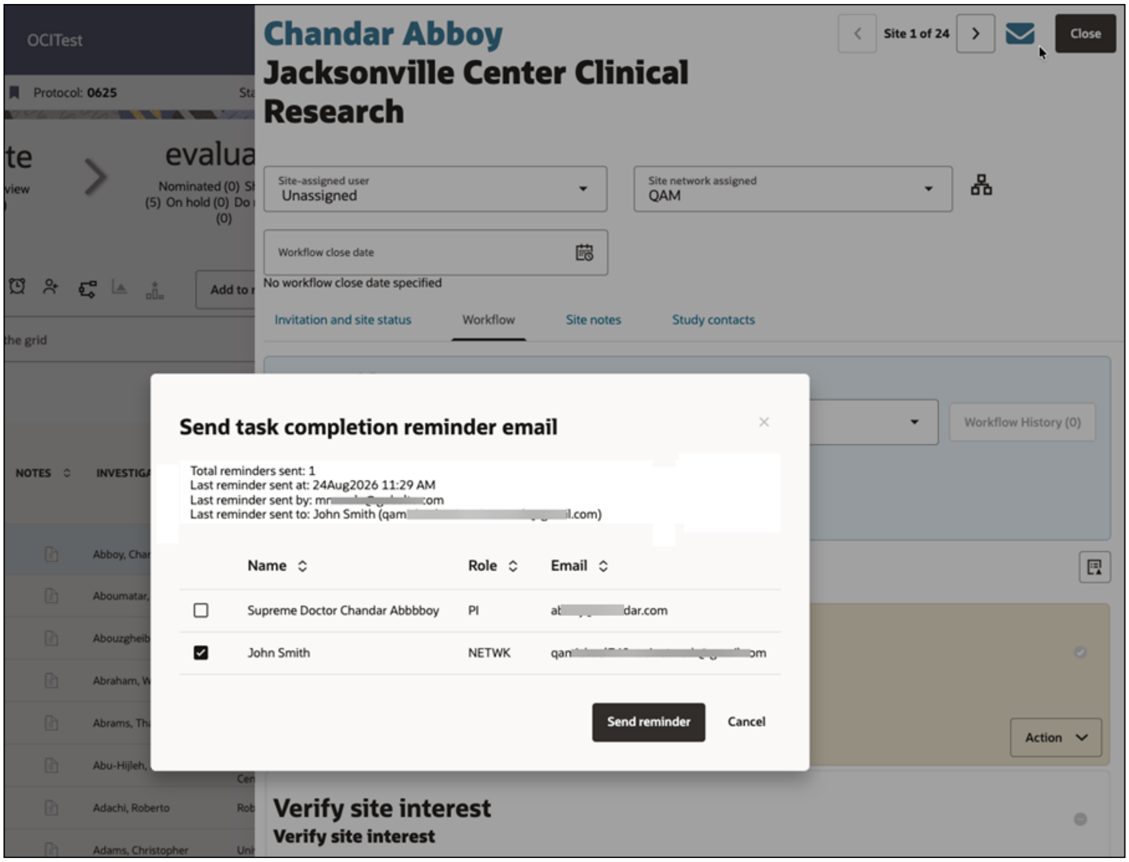
For unchained workflows: The Send reminder action is available for all pending tasks because sites can complete/start them in any order.

When you choose to send a reminder, a Send task completion reminder email modal displays and lists eligible recipients, including their names, roles, and email addresses. The site’s assigned user is also included when applicable. Recipients are initially selected according to the general recipient settings for the email template, and you can select or deselect recipients before sending.

The modal also includes details for the last reminder sent for that task (if any), including the total number of reminders sent, the date of the last reminder, who sent it, and who received it. After you send the reminder, you’ll see a confirmation of success or failure. The email is sent only to the recipients you selected, using the configured task reminder email template and the default sender settings for the site email template.

On the Workflow tab, each applicable task also displays the total reminder count and the date and time of the most recent reminder. Existing email history records capture when the reminder was sent, who sent it, and who received it.

> **Note**
>
> The total reminder count reflects the actual number of reminder emails sent rather than button clicks because a single Send reminder action may notify multiple recipients. Counting each email provides a more accurate record of communications delivered to site contacts, whereas counting clicks would understate the number of recipients reminded.

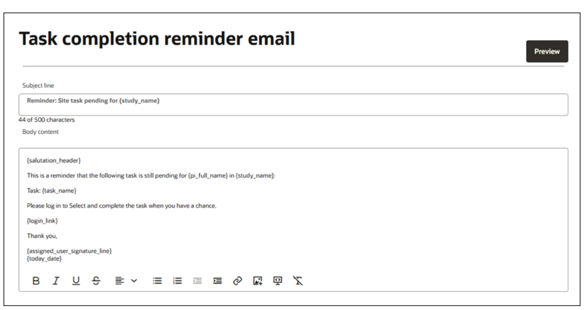


Task reminder email template

You can now customize the email template used for manual task reminders. A new Task reminder email template is available under Manage study email templates > Email body templates and under Workflow configuration > Email templates > Workflow-specific email templates.

The template includes editable subject and body fields and includes default reminder text. You can save your changes or cancel your edits without saving. If you configure a workflow-specific task reminder template, reminders for that workflow use the workflow-specific version. Otherwise, Oracle Site Select uses the applicable study-level task reminder template.

When a task-specific destination is available, reminder emails include a link to complete the task. Oracle Site Select users receive a link to the applicable study in Site Select, while site users receive the applicable Site Select invitation or task link for the specific site and task.

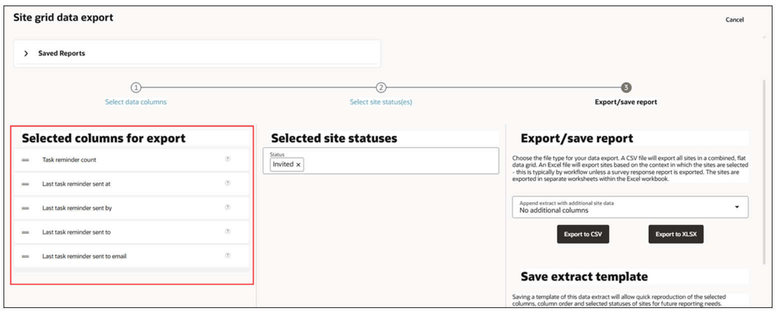


Task reminder information in the site grid and export

You can now include task reminder activity in the site grid and Site grid data export. New reminder columns let you review and report on reminder activity for individual workflow tasks.

When you include Site progress task completion details in a Site grid data export, reminder information is included for each applicable workflow task. Available values include Task reminder count, Last task reminder sent at, Last task reminder sent by, and, when supported, the most recent reminder recipient names and email addresses (Last task reminder sent to and Last task reminder sent to email). The same reminder columns are also available to be added to the site grid through existing site grid column management.

Reminder counts include only reminders that were successfully sent or queued, and the last-reminder fields reflect the most recent successful reminder for that task and site. Exported values correspond to the reminder history displayed for the task in Oracle Site Select and remain associated with the correct workflow task when a site has multiple tasks.



CSV reporting updates

Analyze CSV reporting now includes task-reminder information, so you can report on reminder activity outside Oracle Site Select. Task reminder fields are available in the existing study_sites and study_activities reporting views and follow existing Oracle Site Analyze CSV reporting naming conventions.

Available fields include Task reminder count, Last task reminder sent date/time, Last task reminder sent by, and, when supported, the most recent reminder recipient names and email addresses. Reminder counts include only reminders that were successfully sent or queued, and the last-reminder fields reflect the most recent successful reminder. Reported values correspond to the reminder history shown in the task drawer.

> **Note**
>
> The latest reminder information at the site level reflects the most recent reminder sent specifically for that task, regardless of the task's position in an unchained workflow. In the CSV extract, these details relate to the most recently reminded task at that site. For the current task, the displayed reminder details reflect the most recent reminder sent to the current task.

Workflow task documents

You can now upload a document template directly from the workflow task configuration drawer, making it easier to configure a workflow task without having to navigate to the Workflow documents page. The configuration drawer's new Upload document template (Optional) section lets you select or drag and drop a file. If a template is already available, the drawer displays only the most recent active template as a downloadable link so you can download and view the current active document before uploading a replacement.

When you upload a new template for a non-protocol task, the uploaded file becomes the active template for that workflow task. By design, the drawer doesn’t display template history or provide an option to delete the active template. Uploading a template is optional and doesn’t prevent you from saving other task configuration changes. If you upload a file that isn’t a DOCX file, Oracle Site Select displays the same warning used on the Workflow documents page (i.e., “Not DOCX file extension - placeholder fields will not be supported”).

Template uploads are available based on your permissions. CDA, confidentiality statement, and generic document templates require *CDA/Document Template Upload* permission. Protocol templates require *Study Setup Management* permission.

Protocol templates have additional restrictions. You can upload a protocol template from the task configuration drawer only as a workflow-specific template, and doing so doesn’t replace the default protocol document template. You can replace an existing workflow-specific protocol template from the drawer only when it isn’t active or in use. If the template is active, Oracle Site Select directs you to the Workflow documents page, where protocol templates must be replaced because replacing one can reset workflows for invited sites.

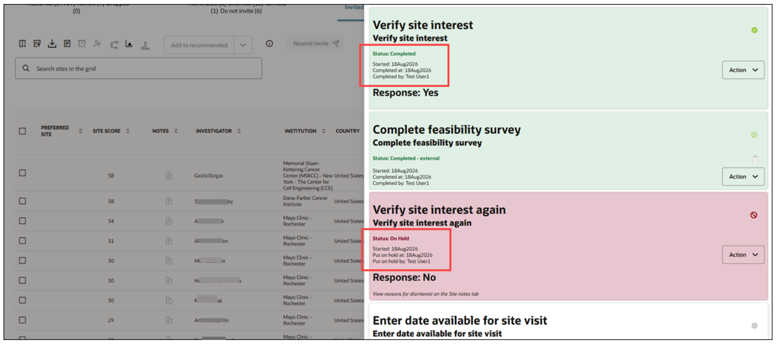
Task dates

You can now rely on the workflow task drawer to show dates and details that match the task’s current status. This enhancement prevents outdated completion or hold information from appearing when one of the following tasks moves between Completed and On hold (discontinued state):

- Verify site interest
- Verify site interest again
- Agree to confidentiality statement
- Generic Document (Attestation required)

Previously, changing a completed task to On hold, or changing an On hold task back to Completed, could leave metadata from the previous status. Now, when a task changes to On hold, the drawer displays the date it was put on hold, and the task card displays values for Put on hold at and Put on hold by. Completion details are removed.

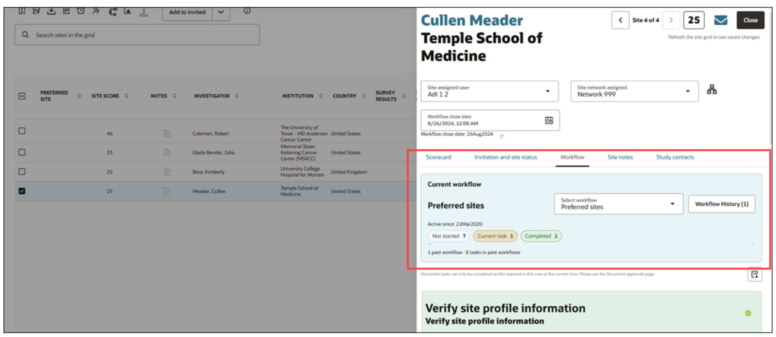
When you change the task back to Completed, the drawer displays the completion date, and the hold details are removed. These values remain accurate when you move the task between the two statuses multiple times. Existing completion behavior for tasks that don’t support On hold status and the audit history for task transitions remain unchanged.



Site workflow history

You can now review a site's current and previous workflows in one place. This enhancement gives you greater visibility into workflow progress, past task activity, and survey results without requiring you to change the active workflow.

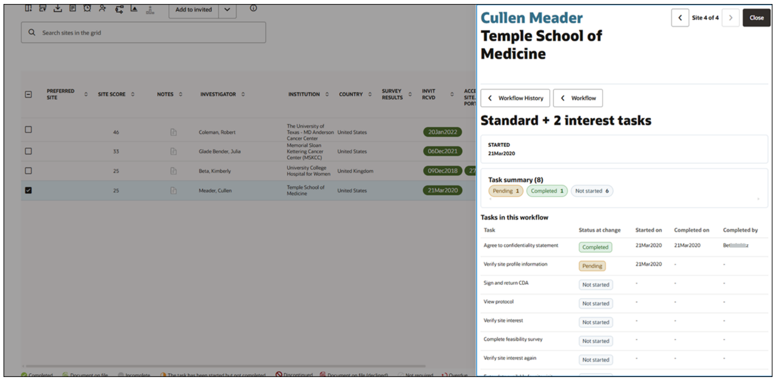
The Workflow tab in the site details drawer now has a Current workflow section with the existing workflow selector and task counts by status (e.g., Not started 7, Current task 1, Completed 1, etc.). A new Workflow History button shows the number of past workflows available. If the site has no workflow history, the tab displays only the current workflow, and the Workflow History button is disabled.



When you open workflow history, the drawer displays a dedicated Workflow History view with the site name, past workflow names, relevant dates, and task status counts. Started and Discontinued dates appear only when that information is available. Because discontinued information is captured going forward, older sites might not display it, and this is expected behavior.

You can select a past workflow and click Expand to view its dates, task status counts, and a read-only task table. The table includes columns for Task, Status at change, Started on, Completed on, and Completed by, allowing you to review past task details and survey results without changing workflows.

From a past workflow, you can return to the history overview by clicking Workflow History, return to the current workflow by clicking Workflow, or Close the drawer.



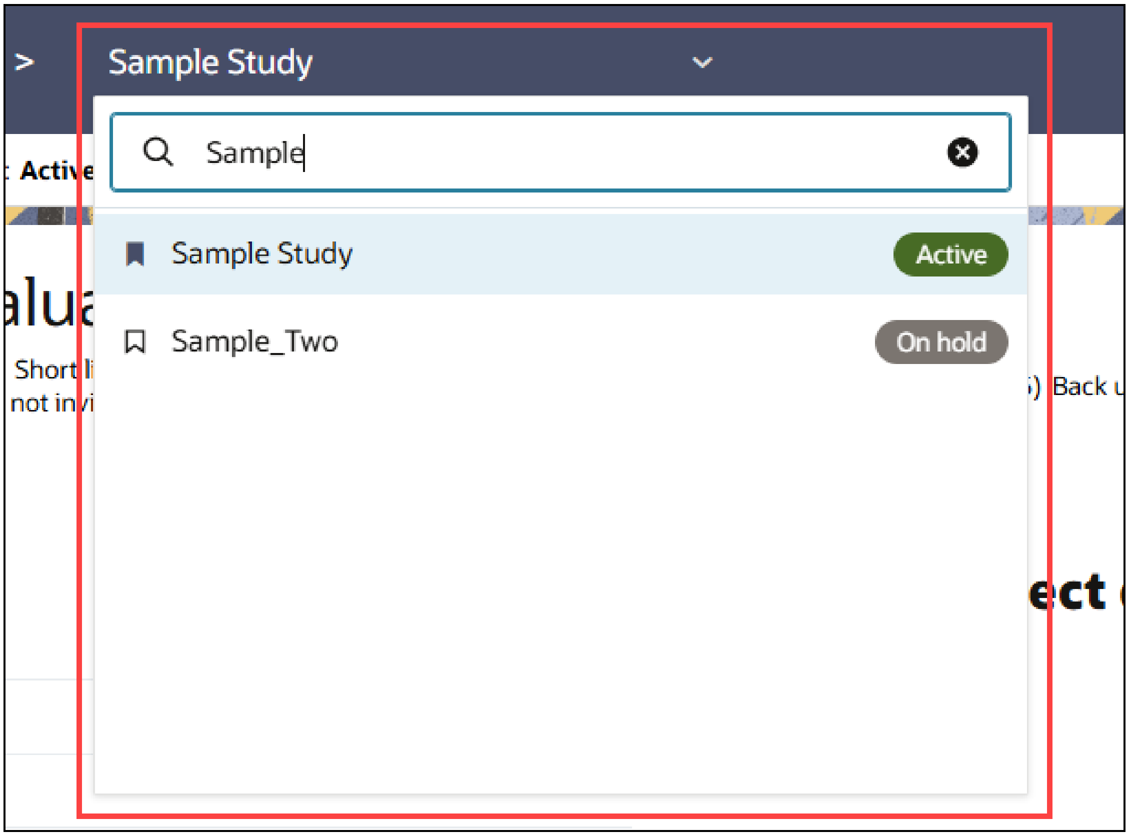
Study management

The study drop-down has improved user interaction, you can specify site profile type when adding a study from My Dashboard, and the Site counts and cycle times dashboard lets you export in CSV, Excel, or PDF format.

Study picker usability enhancements

You can now find and switch studies more easily using an enhanced study picker. A search field lets you search by study name, and each study displays its current status in a badge so you can quickly distinguish active (green badge) and inactive (gray badge) studies.

You can also favorite or unfavorite studies directly from the picker, and your selections are retained when you reopen it. The currently selected study is clearly identified at the top of the list.



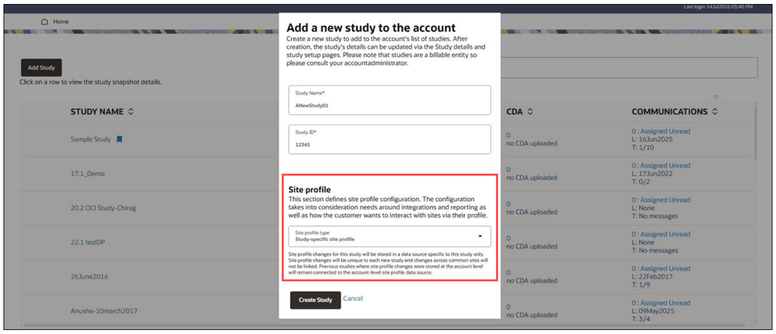
My Dashboard site profile type selection for new studies

If you have *Account study creation* permission and you create a study from My Dashboard, you can choose whether the study uses an account-level or study-specific site profile. This selection lets you configure the site profile type for an individual study without changing the account's default setting.

The Add a new study to the account modal now includes a Site profile section. In the Site profile type list, you can select Account-level site profile or Study-specific site profile. The initial selection is inherited from the setting on the Account page, and contextual information explains how each option stores and applies site profile changes. If you select a site profile type that differs from the inherited account default, a confirmation message explains that the selection cannot be changed after the study is created.

With an account-level site profile, changes are stored in the account-level data source and apply across studies that use it. With a study-specific site profile, changes are stored only for the new study, and changes to common sites aren't linked across studies. Existing studies that use the account-level data source remain connected to it.

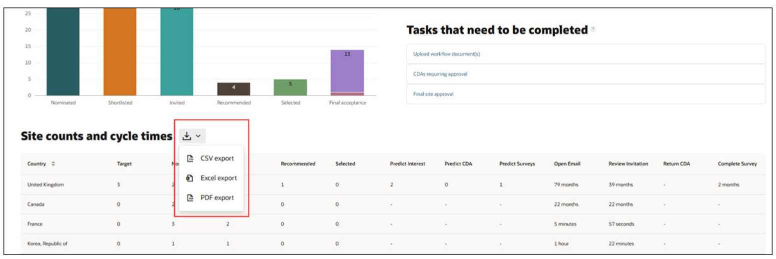
Your selection applies only to the new study and doesn't update the setting on the Account page. After you create the study, the selected site profile type is read-only. The existing study creation confirmation, navigation to the new study home page, and Manage study details link remain unchanged.



Site count dashboard export

With this release, you can export the Site counts and cycle times dashboard from the study home page in CSV, Excel, or PDF format. The export icon is now a drop-down menu that includes all three options. The previously existing CSV export behavior hasn't changed.

When you select the Excel option, you receive a workbook with country-level data from the Study site count dashboard on the first tab and a separate tab for each country containing its site-level data. When you select the PDF option, you can export the entire Site Count dashboard view.



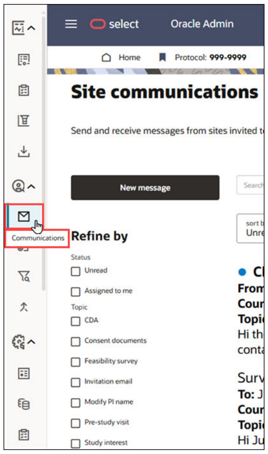
User interface

The global navigation menu has new tooltips, your account administrator can now specify custom link text if your organization uses a custom support URL, and footer text now meets accessibility guidelines.

Global navigation menu icon tooltips

The collapsed global navigation menu now displays tooltips when you hover over each icon, making it easier to identify menu options. The currently selected page is also highlighted.

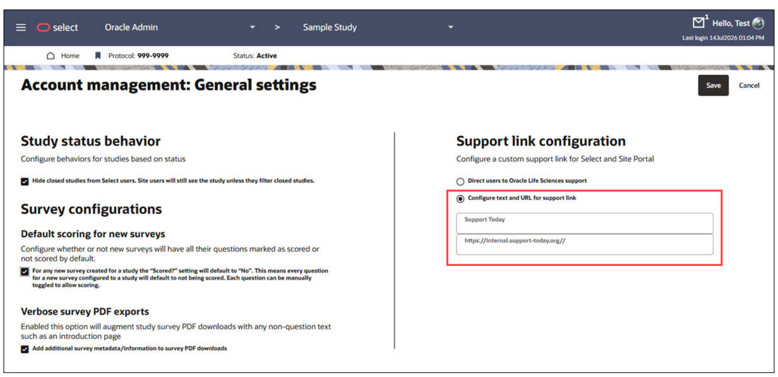
By design, tooltips aren't displayed in the fully expanded menu because each menu item label is already visible.

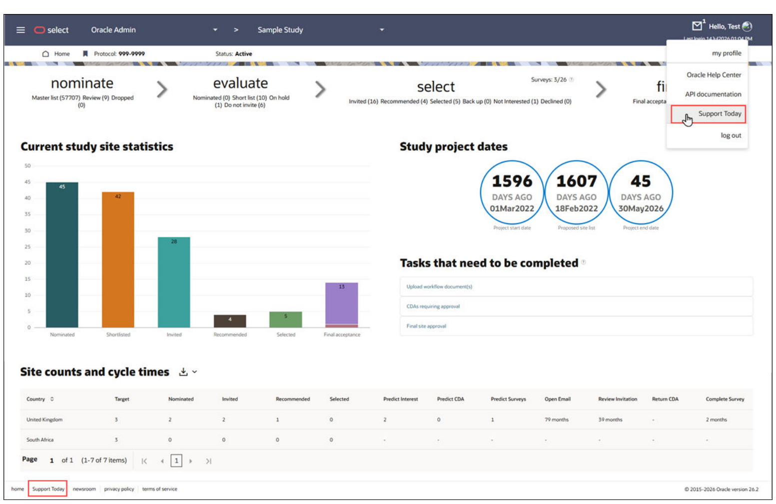


Custom help link text

When your account administrator enables the custom help center link option, they can now specify the link text displayed in Oracle Site Select and the Site portal. The custom link will display in both the user account drop-down menu at the far right of the page header and in the page footer.

The fields to configure the custom text and URL are available when the custom link option is enabled on the Account management: General Settings page.





Accessible page footer

We updated the Oracle Site Select footer on authenticated pages to meet accessibility guidelines. Footer text with links to home, support, newsroom, copyright and release version, etc. now uses the standard Oracle color palette and font, with improved color contrast. We also improved footer links so that you can access them using only the keyboard if preferred.

These enhancements don’t apply to unauthenticated pages, such as Login and Forgot Password.

Service notice

Electronic signature

Effective with the 26.2 release, Select will change electronic signature vendor from AdobeSign to Docusign, and AdobeSign support will be deprecated. All functionality previously available through AdobeSign will be available through Docusign. Contact your Oracle representative to discuss the requirements for enabling Docusign for your account.

- Electronic signature

Electronic signature

Effective with this 26.2 release, Oracle Site Select will change electronic signature vendor from AdobeSign to Docusign, and we will deprecate support for AdobeSign. If you use the electronic signature feature in Oracle Site Select, please contact your Oracle representative to discuss requirements for enabling and configuring Docusign for your organization's account.

2
Browser support

Use a certified or supported web browser to ensure expected functionality and technical support.

Our goal is to provide you with the best experience and advanced capabilities while maintaining maximum security. As products are enhanced, older browsers may no longer provide the capabilities required to support these key objectives. Therefore, we test the current release as follows to certify and/or support browsers:

- **Certified browsers** undergo full testing for new features and regressions. Browser-related issues found after release are prioritized for fixes in future releases.
- **Supported browsers** undergo focused testing on commonly-used pages. We also address all browser-related critical and blocker issues that originate in our applications. :

The following table specifies the certified and supported browsers for desktop and laptop computers:

Product	Release	Certified *Latest versions as of GA*	Supported *Latest versions as of GA*
Oracle Site Select application	26.2	Google Chrome and Microsoft Edge (Chromium)	None
Oracle Site Select site portal	26.2	Google Chrome and Microsoft Edge (Chromium)	Mozilla Firefox

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Revision history

This book's revision date history and part number list will develop over time as we release major, minor, or patch releases for Oracle Site Select 26.2.

Date	Part number	Description
10Sep2026	G58736-01	Pre-General Availability Release Notes

Glossary

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