Oracle Life Sciences Site Select

Release Notes

Release 26.1

G53078-01

May 2026

Oracle Life Sciences Site Select Release Notes, Release 26.1

G53078-01

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What's new in release 26.1

In this release, Oracle Site Select introduces multiple enhancements. We've described the improvements in the feature area descriptions below.

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- Site portal
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- Site profile
  Bell icons make field updates more apparent, you can choose a Site profile type per study, we added per-section demographics validation, and the review prompt text is easier to see.
- Site workflow
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- Study management
  My Dashboard performance is improved and this release introduces case-insensitive Study Name search.
- User interface
  Search now has an option to clear inputs.

- User management
  Administrators can now bulk add role or team assignments for multiple users at once, we added a new permission for note editing and deletion, and you can now see the timestamp for your last login displayed below your name in the page header.

Account settings

A new account-level option lets you include non-question text in survey PDF exports and a new on/off switch in Account Management: Integrations makes Oracle IDCS authentication easier to troubleshoot.

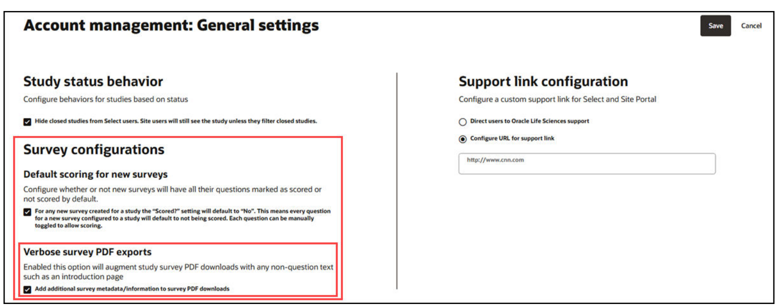
Survey PDF exports

You can now include additional metadata and information in your survey PDF downloads, providing greater flexibility for survey reporting across your account. This new feature is managed through a setting on the Account > General settings page, where you will find a new "Survey configurations" section. The existing "Default scoring for new surveys" option now appears within this section as well. To enable this enhancement, use the new "Verbose survey PDF exports" option, described as "Enable this option to augment study survey PDF downloads with any non-question text such as an introduction page." The checkbox is available by default and is not selected.

When you turn on the verbose survey PDF export option, all survey PDF downloads will include any supplementary text or pages that are not directly related to survey questions or answers. This may include introductory text, or welcome letters, as applicable to your survey. The additional text or pages will appear as unformatted, plain text (i.e., non-HTML formatted). Any survey question hidden due to branching or skip logic, such as questions disabled in Alchemer, will not appear in the PDF. However, non-questions hidden due to skip logic will always be included in the survey PDF.

This enhancement applies to survey PDF exports from several locations: study Document submissions, the survey response modal, the studysite document download popover, the site document library, and the API /documents/document_id route.

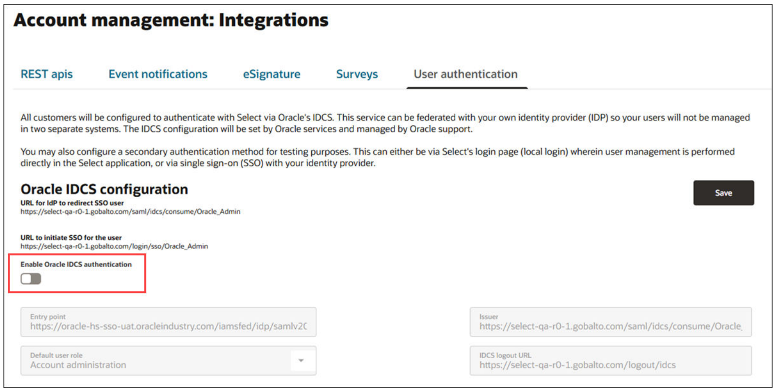
If you leave the verbose option turned off, your survey PDF downloads will not include any additional information. This feature does not affect survey response exports in CSV or Excel format; these files will never include the non-question survey information, no matter how you configure the setting.



Disable IDCS integration

To support troubleshooting scenarios and make it easier to manage your IDCS integration settings, you can now enable or disable Oracle IDCS authentication for your account using a new switch on the Account Management: Integrations page, under the User Authentication tab. The switch, labeled "Enable Oracle IDCS authentication," lets you toggle IDCS on or off.

When you disable IDCS, any related fields are disabled visually; however, the information entered in those fields is preserved and not deleted.



API integration

Event notifications now include more account details in emails, and now you can filter which bucket states trigger site status notifications.

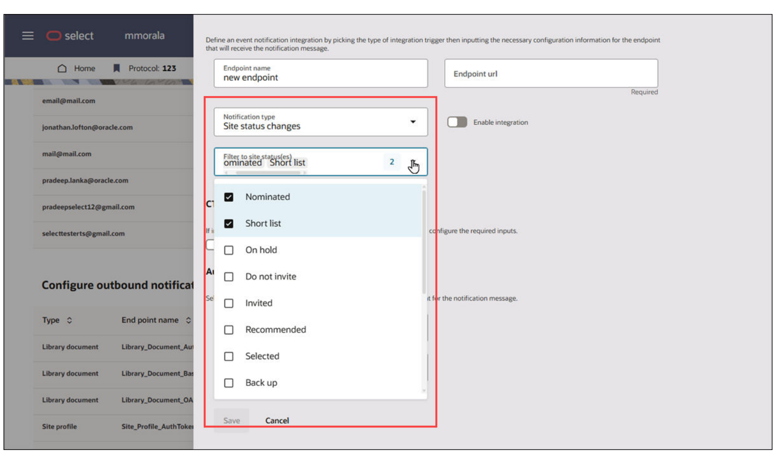
Event notifications

Site status event failure notifications now provide more details to help you troubleshoot issues. The email includes the account name, account ID, and host (environment name).

Site status event notification filter

You can now filter which bucket states trigger site status event notifications to reduce unwanted traffic to your configured endpoint URL. In the outbound notification configuration drawer, you'll find a new multi-select "Filter to site status(es)" drop-down. You can choose from all available bucket states, except for those in the Master list, Review, and Dropped, since notifications are not sent for sites in these buckets.

If you leave the site status filter blank, all status changes will continue to generate notifications as before. If you have multiple event notifications, you can configure each of them with different site status filters, so only status changes matching your selected criteria will result in an outbound notification for that configuration.



Communications

Now you can customize CDA approval emails, preview Protocol phase in templates, skip initial invites while still using a site's survey link, and auto-send Finalize emails.

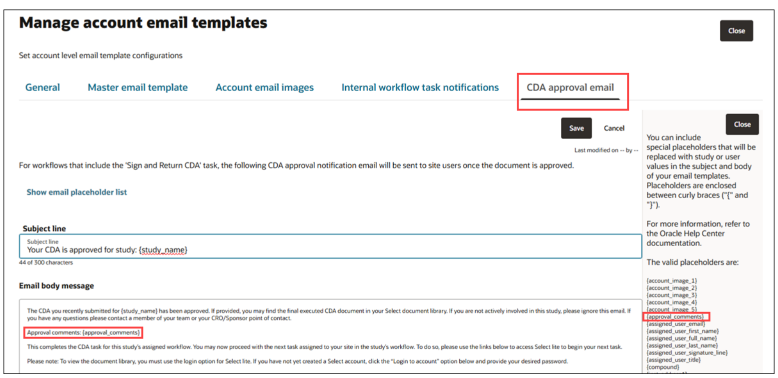
CDA approval email template

Release 26.1 introduces a configurable CDA approval email template at the Account level that lets you align your organization's messaging with evolving eCDS workflows and study-specific needs. By tailoring the Subject and Body, you can clearly indicate when CDA is the final step, helping prevent unnecessary follow-up and confusion.

If you have *Account email template management* permission, you can access the template from the Account > Email Templates and Config menu option. On the Manage account email templates page, you'll find a new CDA approval email tab, designed for workflows that include the Sign and Return CDA task. The CDA approval notification email will be sent to site users once the document is approved.

The CDA approval email tab includes a default, pre-populated template that you can edit. The template supports the {approval_comments} placeholder in both the Subject and Body, and {approval_comments} now appears in the valid placeholder list displayed when you click the Show email placeholder list link.

Until you update the new CDA approval email template configuration, the existing CDA email template continues to be used by default. Once you customize the new template, your updated messaging will be sent to site users, improving clarity and giving you greater control over site-facing communications.



Protocol phase in email preview

In this release, we enhanced email template previews to display the study's saved Protocol phase value. When a study includes a saved value in the Protocol phase field on the Study details page (for example, "Trial Phase I"), the preview now shows that exact value instead of a generic "I/II."

To populate this value, use the {trial_phase} placeholder in the Invitation, Final acceptance, and Final decline templates. When you preview any of these templates, you can confirm the Protocol phase value appears as expected.

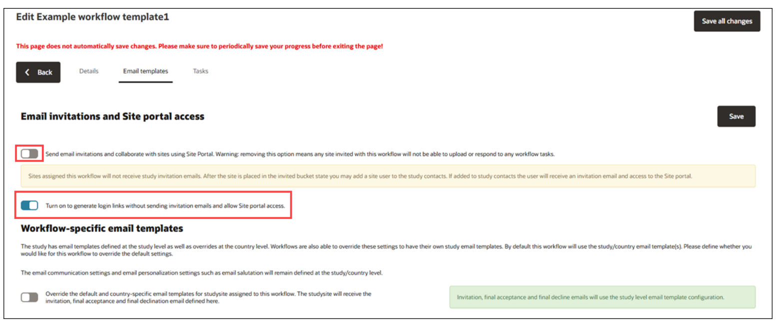
Invitation emails

Now you can disable automatic Initial Invite emails while still generating a site-specific survey link to share manually, so you can manage outreach based on regional, cultural, or strategic needs.

You can turn off the Initial Invite email for a specific workflow using a new switch that's available when "Send email invitations and collaborate with sites using Site portal" is turned off. The new switch is labeled: "Turn on to generate login links without sending invitation emails and allow Site portal access."

When "Send email invitations and collaborate with sites using Site portal" is on, the new switch is disabled; when it's off, the new switch is enabled and defaults to off. Selecting this option prevents all automated email communications, and sites move to the invited bucket even if no initial invite email is sent.

When the new switch is on, the site detail drawer's Invitation and site status tab makes the Login link available to copy, and the Resend invite and Admin invite columns still have the option to send emails.

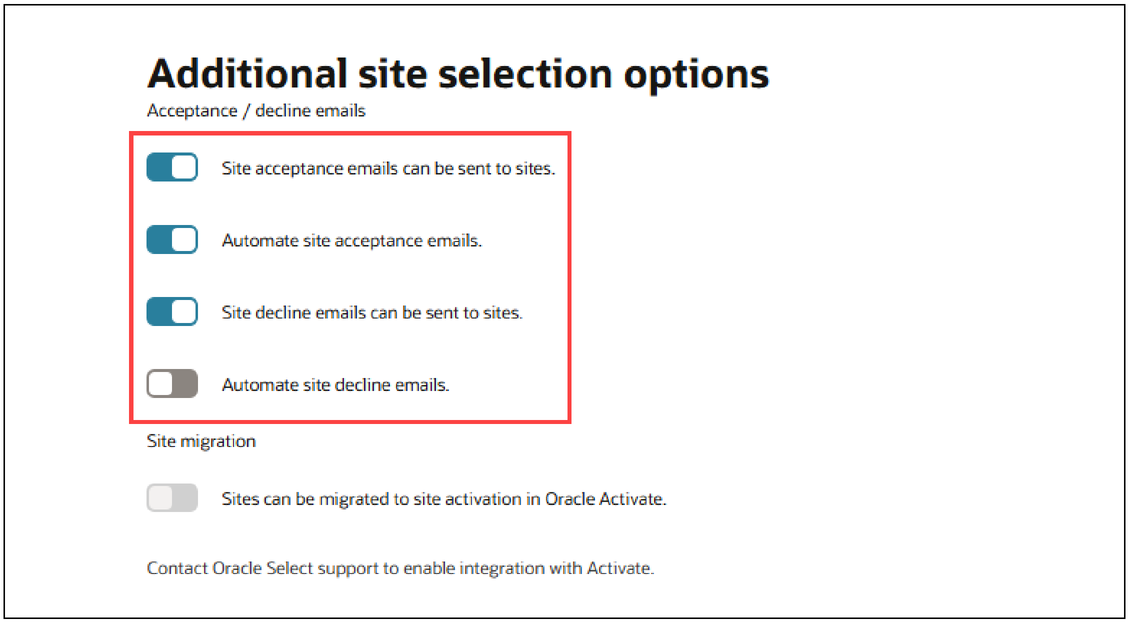


Final Acceptance and Final Decline emails

Release 26.1 introduces automated sending of Final Acceptance and Final Decline emails when you move a site to the corresponding Finalize bucket state. Previously, you needed to manually trigger those emails from the Site Grid, which could create delays and risk missing sites. With this update, emails automatically send upon bucket transition, and successful delivery is indicated by an email icon in the corresponding column on the Site Grid, consistent with the existing user interface behavior.

New configuration switches are added under Study details > Additional site selection options > Acceptance / decline emails to control this behavior independently for acceptance and decline emails. Each automation switch is disabled when its parent email setting is off, and enabled but off by default when the parent setting is on. When enabled, the automation triggers email sending automatically when you move a site to the corresponding Final Acceptance or Final Decline bucket.

Manual sending remains available in both Final Acceptance and Final Decline buckets. When automation is disabled, you must continue sending emails manually from the Site Grid. When automation is turned on, you can still manually resend emails as needed.



Data Export Utility

Data Export Utility columns have additional categories, recently added Alchemer survey question types are now included, and it's easier to see who created a report and when.

Column categorization

Now, when creating or updating a Data Export Utility report you'll see additional column categories that organize fields and make them easier to find.

The cubes now have the following column categories:

- **Note Data Cube**: Date, Site, Study, Person, Survey, General, Criteria, PI and Institution
- **Site Survey Responses Cube**: Site, Study, Survey, General, Criteria, PI and Institution
- **Study Site Data Cube**: Date, Site, Study, Person, General, Criteria, PI and Institution
- **Study-site Users Data Cube**: Site, User, Study, General, Criteria, PI and Institution

Survey question types

We updated the Data Export Utility to support recently added Alchemer survey question types and data columns. The Site Survey Responses Cube now has a "total possible score" column and the Study Site Data Cube now includes a "survey possible score" column.

The Site Survey Responses Cube now includes survey questions and responses for all survey question types that can be exported via the site grid export utility.

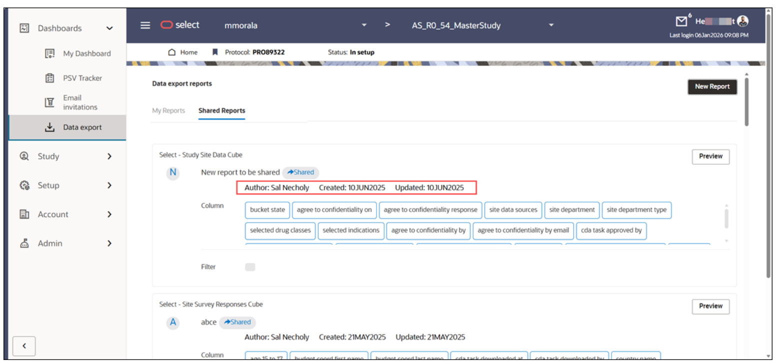
- Numeric and percentage grid
- Textbox grid
- Dropdown menu grid
- Checkbox grid
- Radio grid
- Continuous sum

- Textbox list (numeric and percentage validation)
- Dropdown menu list
- Checkbox list
- Radio button list

Report author and create and update dates

You now see the Author, Created date, and Updated date for shared reports in the Shared Reports tab, as well as for your reports in the My Reports tab on the Data Export Utility homepage, when that information is available. This enhancement provides visibility into report ownership and change history across shared and personal DEU reports.

Author, Created date, and Updated date display for all newly created or updated reports, so you can track who authored the report and when it was created or last modified. Some older reports may not show Author or Created date information, which is expected, but you'll consistently see this information for newly recreated reports.

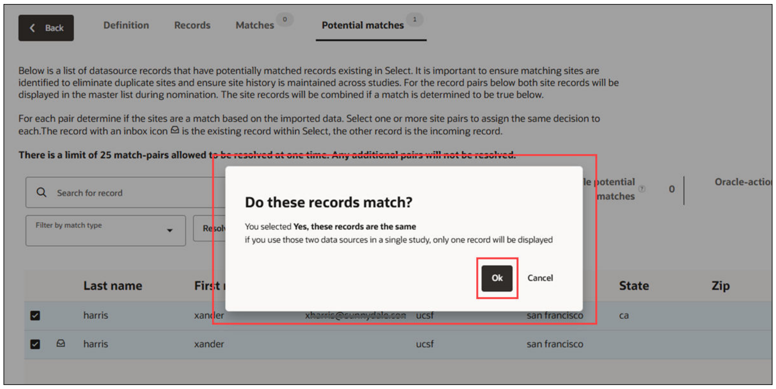


Datasources

Potential record matches require you to provide confirmation before applying Resolve decisions.

Potential record matches

In release 26.1, when you manage potential record matches and choose either "Resolve as a match" or "Resolve as Not a match," a confirmation modal now appears. With this enhancement, you'll need to click "Ok" to confirm your selection before the system applies your choice to the records in your study.



Feasibility surveys

Feasibility surveys now support dynamic PI and Institution in titles via URL parameters, PDF export headers include key study details, and surveys that have modified answers now include indicators to show which answers were changed from the last submitted version.

Survey title

Feasibility surveys now support passing the PI Name and Institution as query parameters when opening the Alchemer survey URL. This enhancement allows the PI Name and Institution to display at the top of the first survey page and to update dynamically for each site's survey.

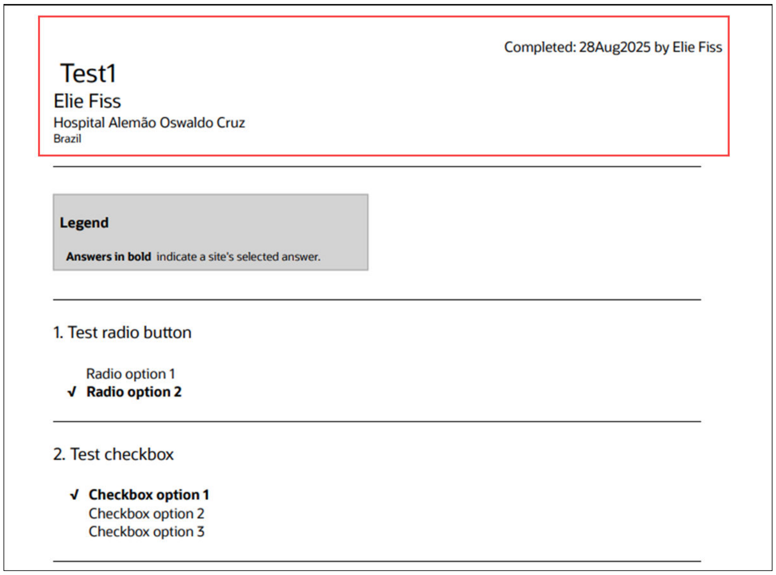
To use this feature, add the following merge codes to the end of your survey's title in Alchemer:

- PI Name: [url("pi_name")]
- Institution: [url("institution")]

For example, set your survey title as: Survey12345 - Name: [url("pi_name")] , Institution: [url("institution")]. You can optionally separate the merge codes with a comma. Be sure to include the brackets, parentheses, and quotation marks exactly as shown above for correct functionality.

Survey PDF export

We enhanced the feasibility survey PDF to display key study details in the header on every page, so you can reference information wherever you are in the document. The header now includes the completion date, the submitter's name, and study information.

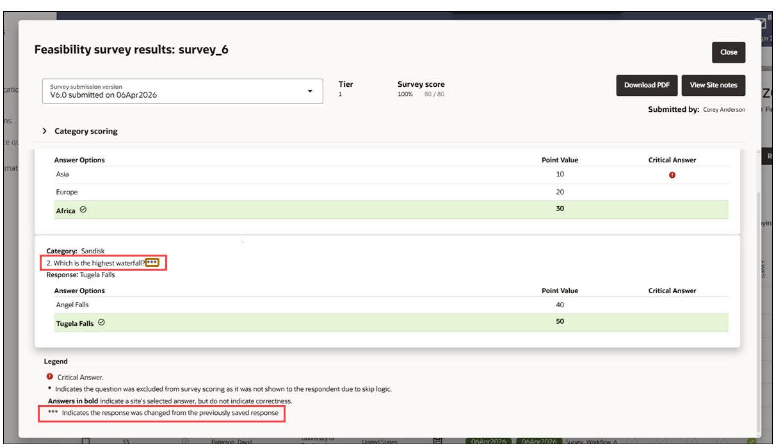


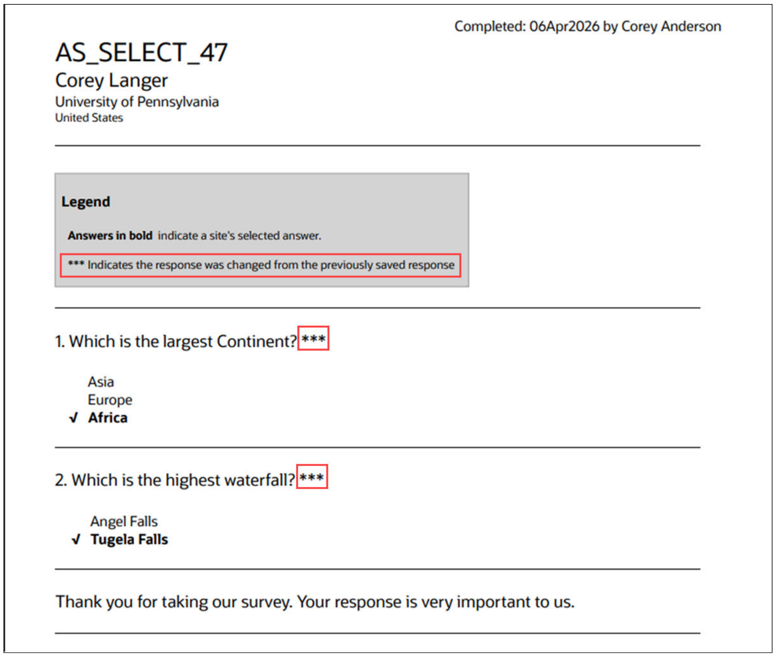
Edited survey responses

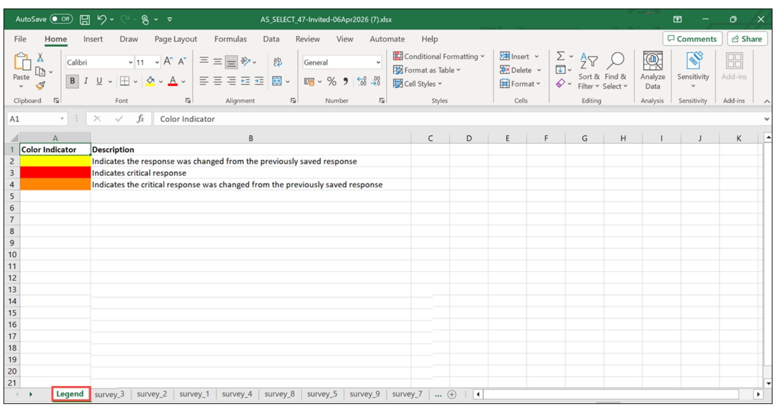
Now, when a site user modifies survey responses, you'll see indicators for the changes. This enhancement highlights edits to previously submitted surveys so you can quickly assess what changed without manual side-by-side comparisons. When a submitted survey is edited and at least one answer changes, the latest version flags modified questions and responses by comparing against the immediately preceding version. CSV exports won't include comparison indicators.

In the Survey response modal and PDF, changed questions are marked by appending three asterisks (***) to the question text, with a legend that reads: "*** Indicates the response was changed from the previously saved response." All supported question types, including advanced list and grid, are validated for this behavior.

In XLSX exports, changed responses are highlighted with a yellow background. Critical responses stay red, and if a critical response is edited, the cell changes to dark amber. The export also has a new first sheet titled "Legends" to explain the indicators: yellow indicates a changed response; red indicates a critical response; dark amber indicates a changed critical response.







Reporting

Reporting views and daily CSVs include additional Alchemer survey question types, plus a total_possible_score column in site_survey_response and survey_response_questions.

New survey question types in daily CSVs

In this release, we updated reporting views and daily CSVs to support all newly added Alchemer survey question types and data columns. The daily CSVs of reporting views will include survey questions and responses for all survey question types that can be exported via the site grid export utility in the site_survey_response view/CSV file. Additionally, the "total_possible_score" column, representing the maximum possible score a site's survey may achieve, is also included in the site_survey_response and survey_response_questions views.

The following question types and data columns were added:

- total_possible_score
- Numeric and percentage grid

- Textbox grid
- Dropdown menu grid
- Checkbox grid
- Radio grid
- Continuous sum
- Textbox list (numeric and percentage validation)
- Dropdown menu list
- Checkbox list
- Radio button list

Site grid

The site grid now uses progressive scrolling, includes a global PI search option, and features a new Status filter panel in the Site history drawer, among other improvements.

Site contacts export

Now you can export a complete list of all site contacts to Microsoft Excel or CSV. This option makes it easier to share contact details with clients, particularly when escalating non-responder sites, and supporting reporting needs.

You'll see a new export option above the contact tables on the Invitation and site status tab and the Study contacts tab in the site details drawer. Click export and choose the format that aligns with your client's needs or your reporting workflow. The export will include the full contact list from the tab where you initiate the export and will include the following columns:

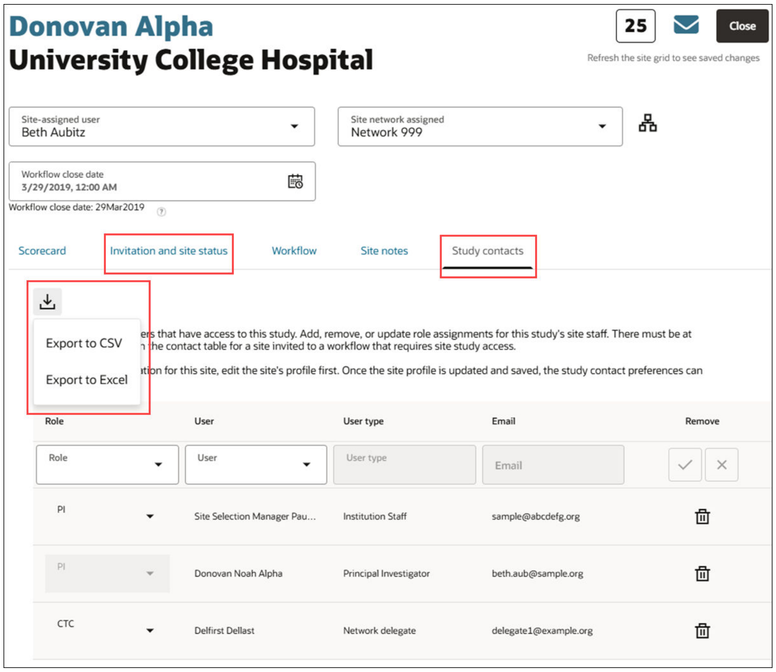
Invitation and site status:

- Representative
- Email address
- Role
- Email sent on
- Status
- Last access

Study contacts:

- Role
- User
- User Type
- Email

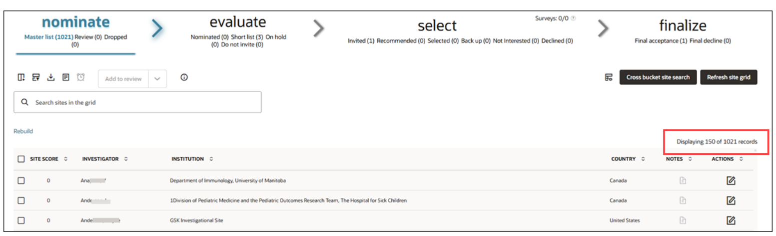
By design, exports exclude Action columns such as Delete, Copy link, Resend invite, and Admin invite.



Progressive loading

With release 26.1, we removed site grid pagination controls, and grids now use progressive scrolling. The first view loads 50 records. Then, as you scroll down, additional batches of 50 records load until all records are displayed.

You can see how many records are visible and remaining in the upper right of the grid, for example, “Displaying 50 of 3001 records.”



Global search

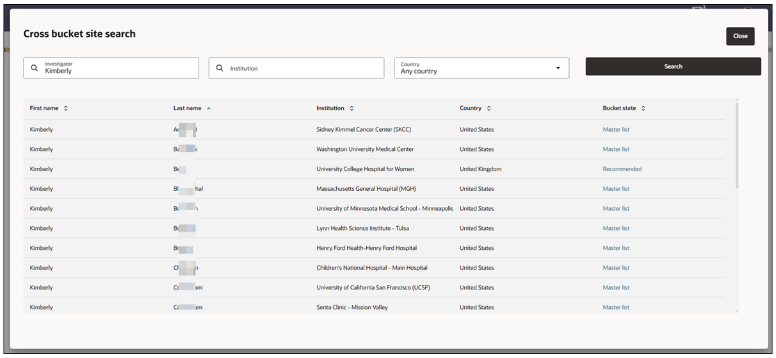
Release 26.1 introduces global PI search to the site grid. This enhancement lets you find a PI across all site grid buckets, so you can navigate directly to the correct record without opening and searching each bucket separately. You’ll see a new “Cross bucket site search” button above the site grid, at the upper right, that opens a new Cross bucket site search modal.

In the modal, you can search by any one of three fields:

1. Investigator (first or last name)
2. Institution
3. Country (from the study's Master List Criteria)

Results return matches regardless of the site’s current bucket, and they display in a table with First name, Last name, Institution, Country, and Bucket state columns. The site's current bucket state is clearly shown, and you can navigate directly to the corresponding bucket state and site record. Click the site's bucket state link to open that bucket state with the site's record loaded in the site grid, where you can take action as needed.

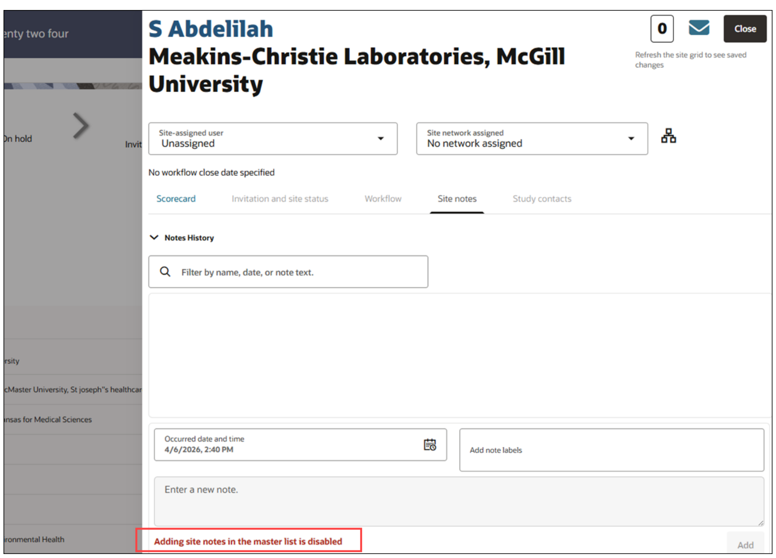
If no matching results are found, you'll see the message "There are no sites available to display."



Site notes modal

By design, adding a site note when a site is in the master list bucket state is disabled. This enhancement adds helper text in the site notes modal to explain why the note input and Add button are disabled.

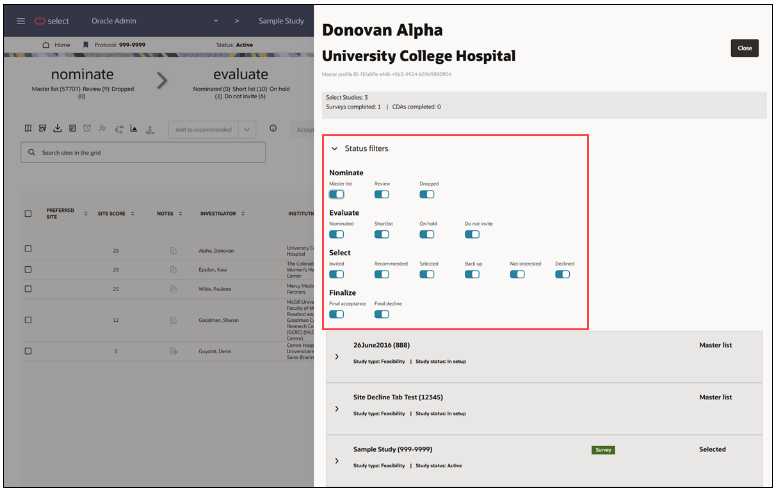
The note input modal now displays bold red text that reads, "Adding site notes in the master list is disabled," and this message remains visible as long as the site remains in the master list.



Site history view

This enhancement adds a Status filters panel to the Site history drawer, giving you control over which bucket states appear in the history list so the view is less cluttered and easier to scan. The panel is accordion-style, and it includes toggle controls for each bucket state.

By default, all bucket states are toggled on, and you can adjust them as preferred to focus on studies where the site was invited, or any other combination of states. Your filtered view then reflects the site's history based on the filters you turn on.



Verify site interest column

Previously, when viewing the site grid's Select > Invited bucket state, multiple workflow task columns could appear if task names differed only by case (e.g., Verify Site Interest; Verify site interest; and Verify Site interest). This led to duplicate columns for essentially the same task and made the workflow task view harder to scan.

With release 26.1, we enhanced the site grid to prevent duplicate columns and improve consistency in how task names appear. The Select > Invited grid now consolidates similarly named tasks into a single column, and it displays the workflow task column name in all uppercase (e.g., VERIFY SITE INTEREST).

Site decoration icons

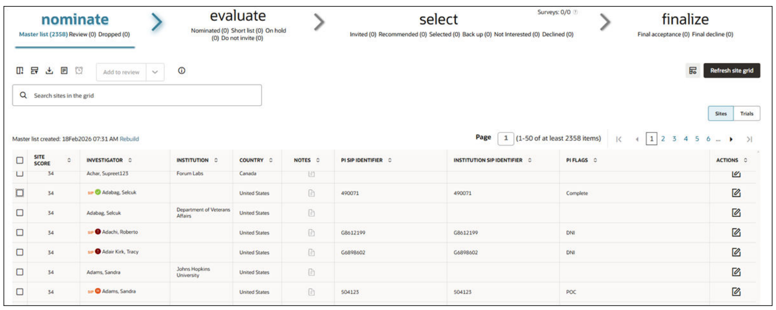
With release 26.1, we returned site decoration icons to indicate certain data fields imported with the site record. Your organization can adapt these indicators as you determine what will work best for your business processes. You can populate the data fields via the API or via CSV data import.

The icons display to the left of the site name in the site grid's Investigator column, and they persist within the grid as the site progresses from one bucket state to another as long as the data fields are not updated. Note that the icons are not included in any CSV or Data Export Utility report. This is expected behavior.

Site decoration icons will display as follows:

Icon	Data field	Display condition
SIP	investigator_sip_id AND institution_sip_id	Displays only when a site record has BOTH fields populated with a non-empty string
	pi_flags	Displays when a site record has the field populated with

Icon	Data field	Display condition
		the exact, case-sensitive string “Complete”
	pi_flags	Displays when a site record has the field populated with the exact, case-sensitive string “POC”
	pi_flags	Displays when a site record has the field populated with the exact, case-sensitive string “DNI”



Site grid loading limits

To help you recognize when large datasets may affect site grid performance, release 26.1 restores a warning message to the Master list when the list exceeds tested limits. The warning appears when a Master list returns more than 40,000 sites or more than 100,000 trial-sites, and it is removed automatically once results drop below the thresholds.

The warning message is: “The selected master list criteria has resulted in more than 40,000 sites returned from the attached datasource(s). Site grid performance may be impacted from working with large datasets. The performance issues may include issues with filtering the site grid and the page failing to load. Please check your master list filters and apply more stringent criteria.” For each mention of “master list” in the warning, the text links to the Master list criteria page.

Site portal

The Study documents tab has usability updates, sites can delete returned CDAs, CDA reviewer comments show on resubmission, and the login page has a new Oracle help center link.

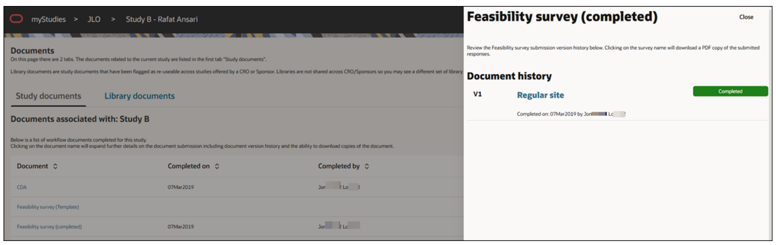
Study documents

We made several updates to improve clarity and usability in the Site portal document experience. To begin, in the document history drawer, the “Task history” section title is updated to “Document history,” and the “X” close icon is replaced with a styled Close button for consistency and easier interaction.

On the Study documents tab, the study name now appears prominently as a subheading above the document list, with the text “Documents associated with: <studyname>.” This enhancement ensures that site users always know which study’s documents they are viewing.

Site portal users can also download the feasibility survey template and completed surveys from the Study documents tab. When the user selects Feasibility survey (Template), the document drawer opens, and the user can click the linked survey template name to download a blank PDF of the survey questions.

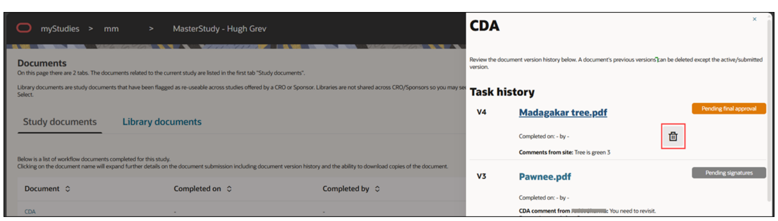
Finally, when a survey task is completed in the assigned workflow, the Study documents tab now shows the Completed on date and Completed by name in the document row; clicking the feasibility survey name opens the document drawer, where they can download the completed document as preferred. The drawer’s Document history section also displays the completion details.



CDA file deletion

Site users can now delete an uploaded file from the Site portal > Documents > Study documents tab when a CDA has been returned with a comment and file. After an Oracle Site Select user marks a CDA as “Requires Site Signature” and the site user returns the CDA with a comment and file, the file appears in Study documents with a clear delete option.

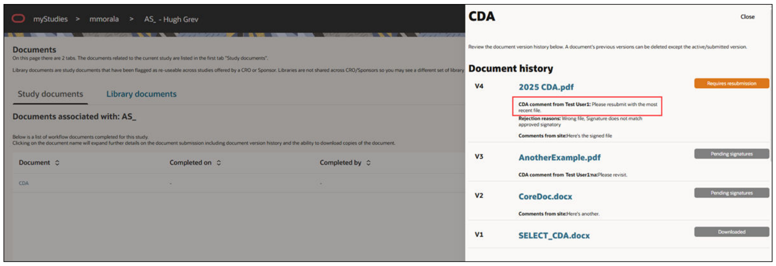
Previously, the uploaded file appeared in Study documents, with no way for the site user to remove it. Now, the Study Documents tab includes a delete option, allowing users to manage files associated with returned CDAs directly from the Site portal.



CDA reviewer comments

This enhancement ensures reviewer comments are displayed in the Site portal when “Requires Resubmission” is selected during CDA review. When a reviewer submits a decision with comments and an attachment, the comments now appear on the corresponding CDA task in the Site portal.

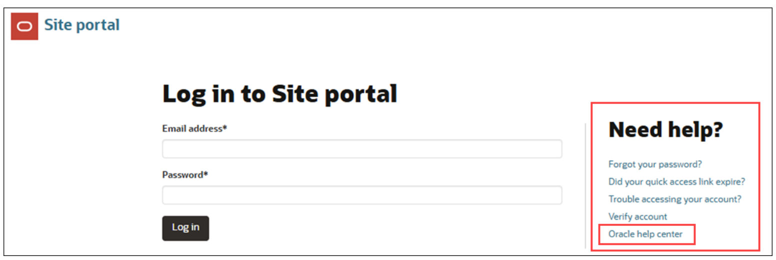
Previously, comments entered with “Requires Resubmission” weren’t visible in the Site portal, which left site users without guidance. With this change, site users can view the reviewer’s feedback associated with the task to understand the reasons and instructions for resubmission.



Site portal help file

We added an “Oracle help center” link to the bottom of the Need help? list on the login page, making support resources easier to find for Site portal users. The link is intended to streamline access to onboarding and guidance materials.

When a site user clicks the link, the Oracle Site Portal Cheat Sheet for Investigative Sites PDF opens in a new browser tab. This provides quick reference information without disrupting the current session.



Site profile

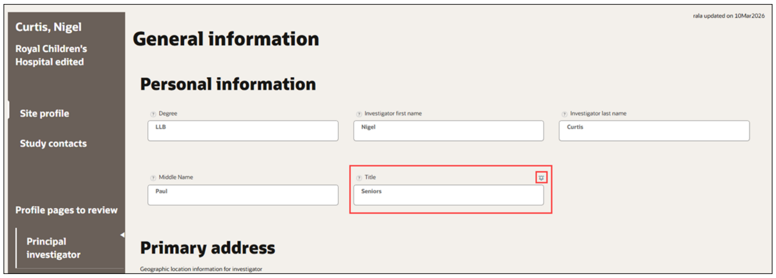
Bell icons make field updates more apparent, you can choose a Site profile type per study, we added per-section demographics validation, and the review prompt text is easier to see.

Alert bell icon

Release 26.1 restores the previous behavior that highlights changed Site profile fields with a bell icon, so updates made in either Oracle Site Select or the Site portal are clearly indicated to the counterpart viewer. The behavior applies to studies that use a study-specific site profile datasource.

When a site user edits the Site profile in the Site portal, alert bells appear for each change in the Oracle Site Select user interface when the Site Select user edits the Site profile. Likewise, when a Site Select user edits the Site profile from the Edit site profile option in the site grid, alert bells appear for each change in the Site portal user interface, so the Site portal user sees the bells while editing.

Clicking an alert bell shows the details of the change, and alert bells disappear after the counterpart saves the Site profile. Example: if the site makes a change in the Site portal, the alert bells show for the Site Select user; the bells hide after the Site Select user makes a change and saves it.



Site profile type for new studies

With this enhancement, you can choose the preferred Site profile type for each new study: Account-level site profile or a Study-specific site profile. Your account will retain the default site profile type you specify. If you choose a different type for a new study (e.g., Study specific instead of Account level), an Oracle administrator will select it on your behalf during the study creation process, and the choice applies only to that study without changing your account's default.

Account specific site profile: Site profile changes for the new study will be stored in an account-level data source. Site profile changes will span across all studies, including studies in the account that do not have a study-specific site profile data source.

Study specific site profile: Site profile changes for the new study will be stored in a data source specific to the new study only; site profile changes will be unique to each new study, and changes across common sites are not linked. Previous studies where site profile changes were stored at the account level will remain connected to the account-level site profile data source.

If the Oracle administrator creates a study on your behalf, they can also add data sources for the study, but in case they don't, you can add datasources for that study from Study datasources page. This is applicable to both account specific and study specific site profile options.

> **Note**
>
> When you have *Account study creation* permission, you see an Add Study action button above the study list in My Dashboard. With this enhancement, when you add a study from My Dashboard, it will default to the Account-level site profile or a Study-specific site profile set at the account level. If you need to create a study with a profile type other than the default set for your account, please contact your Oracle administrator. **Once a study is created, the selected Site profile type for that study cannot be changed.**

Demographics validation

Patient demographic input validation on the site profile now applies independently to the Age, Gender, Race, and Ethnicity sections. Each section requires its categories to sum to 100%, and the page displays section-specific warnings when a sum is above or below 100%.

In addition to section-level warnings, individual percentage fields show validation messages that direct you to the section that needs correction.

Section review prompt text

To make the profile review step easier to spot, we moved the review prompt text higher on the page to make it more prominent.

Previously, “Please review each page above before closing” sat at the bottom of the left menu panel, which required scrolling and could be overlooked. Now, the prompt appears directly beneath the Profile Pages to Review section, and it’s clearly visible when viewing the page.

Edit site profile navigation text

In release 26.1, we added rules to keep the Site profile’s left navigation text visible and accessible. When the browser width is reduced (for example, to 500 pixels), the text for “Profile pages to review” and “Please review each page above before closing” automatically scales down to maintain readability.

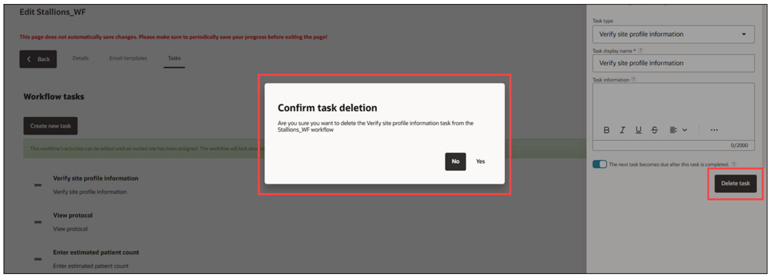
Site workflow

Task deletion has been moved to the task details drawer and includes a confirmation modal to prevent unintentional deletion.

Task deletion

This enhancement moves task deletion into the task details drawer, so you’re less likely to delete a task by mistake. The delete icon is removed from the Account workflow template page (Workflow template > task list) and the Study workflow configuration page (task list). Instead, you’ll find a Delete task button at the bottom right of the task details drawer, and you must confirm a modal before the task is removed. If a study workflow is locked (assigned to a site), you can’t remove tasks.

When you delete a task, you’ll see a confirmation modal titled “Confirm task deletion” with the message: “Are you sure you want to delete the task from the workflow?” Choose No to close the modal without deleting, or choose Yes to close the modal and remove the task.

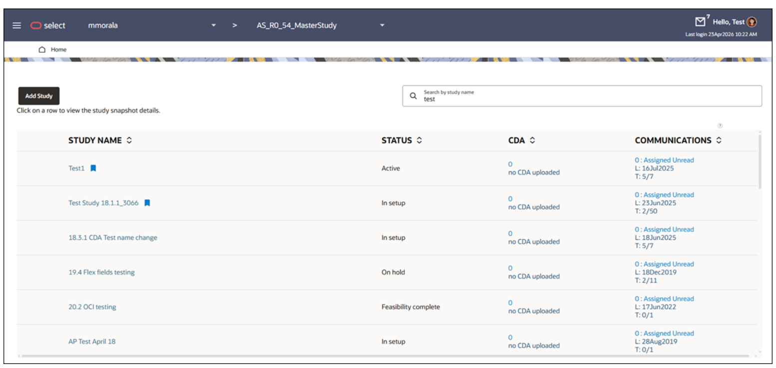


Study management

My Dashboard performance is improved and this release introduces case-insensitive Study Name search.

My Dashboard

An infrastructure update in this release improves My Dashboard performance for faster loading. You can also now perform a case-insensitive search by Study Name. The search will check all studies in the full list and display any matching results in the grid.



User interface

Search now has an option to clear inputs.

Search fields

All search fields in Oracle Site Select now include a clear option that allows you to quickly remove any typed content. The option displays while you have the search field in focus; click the field or mouse over it to display the icon. When you click clear to delete your text, the related table or search results automatically refresh to show all items, with no filter applied.

User management

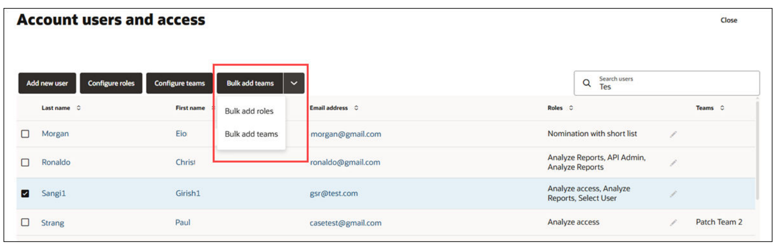
Administrators can now bulk add role or team assignments for multiple users at once, we added a new permission for note editing and deletion, and you can now see the timestamp for your last login displayed below your name in the page header.

Bulk add role or team

If you have a role with *User and Role Management* permission, you can now bulk-add roles or teams for multiple users at once. These changes let you quickly grant roles and team assignments to multiple users and large groups. All updates respect existing role and team assignments and prevent accidental duplication or unwanted changes if you cancel before assigning.

On the Account > Users page, you'll see a new column of selection check boxes as the first column in the user grid. Above the table, a new "Bulk" button opens a drop-down menu for bulk adding either roles or teams. The Bulk button is disabled until you select at least one user in the grid.

When you click the enabled Bulk button, the Bulk assigning roles or Bulk or assigning teams drawer opens. Choose which roles or teams to assign and then click Assign to apply those selections to the users.



Notes user permission

Oracle Site Select now includes an *Edit/delete own site notes only* user role permission that allows you to edit or delete only your own site notes and reasons for study exclusion. This enhancement gives your organization more granular control over note management and enhances data security by limiting access to sensitive information based on your assigned permissions.

If you hold the new *Edit/delete own site notes only* permission, and not the broader *Edit/delete a site note* permission, you'll see edit and delete icons only for site notes and reasons that you authored. Any edits you make are reflected in reporting views. Site notes and exclusion reasons written by others will not display the edit or delete icons for you.

If you have the permission to edit or delete all site notes, your functionality remains unchanged, and you can modify or remove all site notes and reasons. If you don't have either edit/delete permission or the Read-only notes/reasons view permission, you cannot view or update site notes and reasons in any area, including the site grid notes drawer and modal.

Last login timestamp

You can now see your last login timestamp below your user name, at the far right of the page header after you log in. Each time you access the system, this timestamp shows when you previously logged in, helping you confirm that your account is secure. If you notice a last login date or time that does not match your activity, you can take immediate action to protect your credentials.

Impact analysis

Review a summary of the business and functional impact for enhancements in the 26.1 release.

Enhancement	Enablement setting	Impact
Account settings Survey PDF exports	Yes - *API and Authentication Management* permission	The new optional Verbose survey PDF exports account setting lets you include plain-text non-question survey content like intros or welcome pages in PDF downloads from supported locations, without affecting CSV or Excel exports.
Account settings Disable IDCS integration	Yes - *API and Authentication Management* permission	A new switch on Account Management > Integrations > User Authentication lets you turn Oracle IDCS authentication on or off without losing your saved IDCS settings.
API integration Event notifications	None	Site status event failure notifications now provide more details to help you troubleshoot issues.
API integration Site status event notification filter	Yes - *API and Authentication Management* permission	A new Filter to site status(es) option lets you limit site status event notifications to selected bucket states for each outbound notification configuration, while leaving it blank keeps notifications for all supported status changes.
Communications CDA approval email template	Yes - *Account email template management* permission	Release 26.1 adds an account-level, customizable CDA approval email template so permitted users can tailor approval notifications, including {approval_comments}, for Sign and Return CDA workflows while the existing template remains the default until updated.
Communications Protocol phase in email preview	None	Email template previews now display the study’s saved Protocol phase value through the {trial_phase} placeholder

Enhancement	Enablement setting	Impact
		instead of showing a generic phase label.
Communications [Invitation emails]	Yes - *Select Lite Workflow Configuration* permission	A new workflow switch lets you generate site-specific login links and grant Site portal access without sending automatic Initial Invite emails, while still allowing manual invite emails if needed.
Communications [Final Acceptance and Final Decline emails]	Yes - *Study Setup Management* permission	Release 26.1 adds optional automation to send Final Acceptance and Final Decline emails automatically when a site moves into the matching Finalize bucket, while still allowing manual sending and resending.
Data Export Utility [Column categorization]	None	Data Export Utility report fields are now grouped into new column categories within each cube, making columns easier to find when creating or updating reports.
Data Export Utility [Survey question types]	None	The Data Export Utility now supports additional Alchemer survey question types and adds possible-score columns to the Site Survey Responses and Study Site Data cubes.
Data Export Utility [Report author and create and update dates]	None	The Data Export Utility now shows report author, created date, and updated date for shared and personal reports when available, improving visibility into report ownership and history.
Datasources [Potential record matches]	None	Release 26.1 adds a confirmation modal when resolving potential record matches as either a match or not a match, requiring you to confirm before the decision is applied.
Feasibility surveys [Survey title]	None	Feasibility surveys can now pass each site's PI Name and Institution as query parameters to Alchemer so those values display

Enhancement	Enablement setting	Impact
		dynamically on the first survey page.
Feasibility surveys Survey PDF export	None	The feasibility survey PDF now shows key study details, including completion date, submitter name, and study information, in the header on every page.
Feasibility surveys Edited survey responses	None	Edited survey responses are now clearly marked in the response modal, PDF, and XLSX exports so you can quickly identify what changed from the previous submission.
Reporting New survey question types in daily CSVs	None	Reporting views and daily CSVs now support the newly added Alchemer survey question types and include the total_possible_score column in the relevant survey response outputs.
Site grid Site contact export	None	You can now export the full site contact list from the Site details drawer to Excel or CSV, including key contact fields while excluding action columns.
Site grid Progressive loading	None	Release 26.1 replaces site grid pagination with progressive scrolling that loads records in batches of 50 and shows how many records are currently displayed out of the total.
Site grid Global search	None	Release 26.1 adds a Cross bucket site search modal that lets you find investigators, institutions, or countries across all site grid buckets and jump directly to the matching site record in its current bucket.
Site grid Site notes modal	None	The site notes modal now shows bold red helper text explaining that adding site notes is disabled when a site is in the Master list bucket.

Enhancement	Enablement setting	Impact
Site grid Site history view	None	A new accordion-style Status filters panel in the Site history drawer lets you toggle bucket states on or off to customize and simplify the history view.
Site grid Verify site interest column	None	Release 26.1 prevents duplicate workflow task columns in the Select > Invited grid by consolidating task names that differ only by case and displaying the column name in uppercase.
Site grid Site decoration icons	None	Release 26.1 restores configurable site decoration icons next to site names in the grid to reflect imported data fields from API or CSV, and the icons persist across bucket changes but are not included in exports.
Site grid Site grid loading limits	None	Release 26.1 restores a Master list warning when results exceed 40,000 sites or 100,000 trial-sites, alerting users that large datasets may impact site grid performance and linking them to refine Master list criteria.
Site portal Study documents	None	The Site portal document experience now offers clearer labels and context, plus the ability to download feasibility survey templates and completed surveys with visible completion details in the Study documents tab and document history drawer.
Site portal CDA file deletion	None	Site users can now delete files they uploaded for returned CDAs directly from Site portal > Documents > Study documents using a new trash icon.
Site portal CDA reviewer comments	None	Reviewer comments entered when Requires Resubmission is selected during CDA review now appear on the related CDA task in the Site portal, giving site users clear guidance for resubmission.

Enhancement	Enablement setting	Impact
Site portal Site portal help file	None	The login page now includes an Oracle help center link in the Need help? section that opens the Oracle Site Portal Cheat Sheet PDF in a new tab for easier access to support resources.
Site profile Alert bell icon	None	Release 26.1 restores bell icons that flag Site profile field changes made by the other party in Select or the Site portal for studies using study-specific Site profile datasources, with the alerts clearing after the counterpart saves.
Site profile Site profile type for new studies	Yes - *Account study creation* permission	You can now set whether each new study uses an account-level or study-specific Site profile data source, while keeping your account's default profile type unchanged unless explicitly overridden for that study.
Site profile Demographics validation	None	Patient demographic validation now checks Age, Gender, Race, and Ethnicity separately, requiring each section to total 100% and showing clear section-specific and field-level warnings when it does not.
Site profile Section review prompt text	None	The profile review prompt has been moved directly below Profile Pages to Review so it is more visible and less likely to be missed.
Site profile Edit site profile navigation text	None	Release 26.1 improves Site profile accessibility by automatically scaling left navigation text at smaller browser widths to keep review instructions readable.
Site workflow Task deletion	None	Task deletion has been moved into the task details drawer with a required confirmation step, reducing accidental deletions and preventing task removal from locked study workflows.

Enhancement	Enablement setting	Impact
Study management My Dashboard	None	This release improves My Dashboard load performance and adds case-insensitive Study Name search across the full study list.
User interface Search fields	None	Search bars in Select now include a clear (X) button that quickly removes entered text and automatically refreshes results to show all items again.
User management Bulk add role or team	Yes - *User and Role Management* permission	You can now bulk-assign roles or teams to multiple selected users at once from the Account > Users page.
User management Notes user permission	Yes - *Edit/delete own site notes only* permission	The new *Edit/delete own site notes only* permission lets users modify or remove only the site notes and exclusion reasons they authored, providing more granular and secure note access control.
User management Last login timestamp	None	Users can now see their previous login timestamp in the page header after signing in, making it easier to spot suspicious account activity.

Service notice

Review an important Oracle Site Select change notice.

Study invitations

In release 25.1, Oracle Site Select introduced a change to address an issue where the name being used for site emails was from the study site user and not the site profile. That change in 25.1 updated the study invitation process so invitations and the Invitation received modal (now the "Invitation and site status" tab in the site details drawer) showed the expected first and last names of the recipient. When you invited a site, Oracle Site Select used the name from the site grid and site profile (i.e., the studysite's site instance), rather than pulling it from the site portal user's account profile. The names would then match what you saw in the site grid.

To ensure the names appeared as expected in the "Invitation and site status" tab in the site details drawer and emails, **the site profile needed to be set as the highest priority study data source**. If it wasn't, other sources might override the first and last name values shown to site users.

In this 26.1 release, we are reverting the change described above, as it had the unintended consequence of sending site invitations and other emails with the PI name as recipient even if the email was being sent to the CTC, Additional Site Staff, IRB Coordinator, etc. We are actively evaluating this issue and will correct the invitation behavior in an upcoming release.

Stability improvements

These are the issues we fixed in this release.

- API data integration
- Communications
- Dashboards
- Data sources
- Document library
- Feasibility surveys
- Notes
- Site grid
- Site workflow
- User account management
- User interface

API data integration

Description	Ticket	Severity
The “Click here” link in the API documentation General guidelines section redirected to the Home page instead of displaying the standard list of institution country names. The link now opens the validated country list as designed.	SEL-22085	3

Communications

Description	Ticket	Severity
The email template preview displayed incorrect content in certain scenarios. Country-specific templates showed content from a previously selected country, and previews displayed the default template instead of the selected tab. We corrected these issues, so country-specific templates and previews now display the correct content based on the selected tab.	SEL-21908	3

Description	Ticket	Severity
Text entered in Email Templates fields was delayed and did not appear in real time, which could result in input errors. This issue has been corrected, so text now displays immediately as you type.	SEL-21974	3
The Invitation and site status tab in the site details drawer incorrectly listed the PI name as "Representative" for all listed users regardless of role. With this correction, the Representative list now correctly displays the user's full name. See the Service notice section in these release notes for more information.	SEL-22210	2
Admin invitation emails were not delivered when sent from the site details drawer’s Invitation and Status tab because the sender domain (@gobalto.com) was incorrect. This could result in the email being rejected due to customer DMARC policies. With this correction, the emails are now sent from the no.reply.select@oracle.com domain.	SEL-22230	2

Dashboards

Description	Ticket	Severity
The last page navigation button on the My Dashboard page was always disabled, regardless of the current page or total number of pages. This issue has been corrected so the button now functions as expected.	SEL-22205	4

Data sources

Description	Ticket	Severity
Users who have the appropriate permission to delete a datasource are unable to do so in the Oracle Site Select user interface.	SEL-15673	3
A timeout error could occur when replacing the CSV schema for an unpublished datasource for larger datasources or more complex schema updates.	SEL-19634	3
The Delete button icon was not visible in the Actions column when viewing records in a published datasource. The edit icon displayed, but the delete option did not appear, even when adjusting browser zoom settings.	SEL-21876	3

Document library

Description	Ticket	Severity
When navigating the section menu on the Edit Site Profile or View Site Profile page using the arrow up/down keys, users were unable to shift focus to the Document Library menu item. This issue prevented access to the Document Library keyboard-only navigation.	SEL-20169	4

Feasibility surveys

Description	Ticket	Severity
Points from a skipped dependent question were incorrectly included in survey and category score calculations even when the question was not shown to the user due to skip logic.	SEL-20101	2

Notes

Description	Ticket	Severity
Adding a site note with an incorrect Note Label could make the site drawer freeze, preventing you from closing it or updating the note without refreshing the page. This issue has been corrected. You can now select labels only from the predefined account-level list, and the Add note labels field includes type-ahead search to help you find the label you need.	SEL-22012	3

Site grid

Description	Ticket	Severity
Dates in the Invitation received (Invit Rcvd) column did not sort in ascending or descending order as designed.	SEL-21037	3
Clickable entry fields on the Site Profile page in the UAT environment shifted position when selected, moving up on click and down when another field was selected. This behavior made it difficult to interact with fields as expected. This issue has been corrected so that selected fields are highlighted without shifting position.	SEL-21802	4
The status of the CDA approval task displayed incorrectly across the site grid, site details drawer, and document history after selecting the Final approval action for a “Sign and return CDA” workflow task. With this correction, the task status updates as expected and displays consistently across all locations.	SEL-21914	3

Description	**Ticket**	**Severity**
Task status icons were not visible on the site grid when workflow task dates and country task dates were not set in the study's milestones. This issue has been corrected, and the status icons now display as expected.	SEL-22062	2

Site workflow

Description	**Ticket**	**Severity**
Text saved to the Task Information field in account-level workflow templates did not display as expected. This issue has been corrected, so the text now displays properly, and you can create and edit it in both new and existing workflow templates.	SEL-21958	2

User account management

Description	**Ticket**	**Severity**
Oracle Site Select users did not receive a password reset email after using the "Forgot password" link. This issue has been corrected, so if you need to reset your password using the link, you'll receive the email as expected.	SEL-21769	1
On the Account users and access page, if you applied a "Search users" filter value, it was not retained after completing a bulk action, such as assigning roles to multiple users. As a result, the displayed results could differ from your previously filtered group. With this correction, the search input now clears on grid refresh, aligning with behavior across other pages in Oracle Site Select.	SEL-21868	4

User interface

Description	Ticket	Severity
Text input fields in the Site profile did not display as expected and could shift out of alignment with surrounding page components. Fields now display consistently without changing alignment.	SEL-21542, SEL-21543	3
The Task Details drawer flickered continuously when you opened a locked workflow task (i.e., assigned to a site). The content refreshed repeatedly, making it difficult to view task details.	SEL-21903	3
The site detail drawer's Invitation and site status tab and action links inside the tab were not accessible using keyboard navigation. This issue has been corrected so you can access the tab and perform its actions using keyboard input.	SEL-20024	3
Accessibility testing on the Oracle Site Select site details drawer and Document submissions page and the Site portal MyStudies page identified markup issues (i.e., ARIA attributes that help screen readers interpret dynamic content like pop-ups). The issues have been corrected to improve accessibility and ensure consistent behavior.	SEL-19827, SEL-20076, SEL-20699	4
The “Last modified on” and “Modified by” information displayed inconsistently when no changes were made. Some pages omitted the label, while others incorrectly showed the current user as the modifier. After this correction, when no changes are made, the fields now consistently display as	SEL-22126	4

Description	Ticket	Severity
“Last modified on – by --” across the application.		
The Cancel button on the Account Note Label Configuration page appeared partially clipped, which made the label difficult to read. This issue has been corrected, so the button now displays fully.	SEL-22128	4

New known issues

This section identifies unresolved issues found during the development of this release.

- Communications
- Feasibility surveys
- Site grid
- Site portal
- User interface

Communications

Description	Ticket	Severity
When you configure email templates, preview images may appear larger than specified in the template settings. This occurs regardless of the configured image dimensions, which can distort the preview and make template design and approval more difficult.	SEL-21709	4

Feasibility surveys

Description	Ticket	Severity
When a survey contains page breaks, submitting the survey correctly creates V1 of the response in Oracle Site Select. However, if the respondent reopens the survey and only navigates between pages (Next/Back) without modifying any answers and without resubmitting, the system incorrectly creates additional response versions (e.g., V2, V3, …) in Oracle Site Select. This results in duplicate versions being generated from page navigation and causes inaccurate version history.	SEL-22069	3
When you create a new survey and configure its scoring, but you have not yet	SEL-22286	3

Description	Ticket	Severity
sent the survey to any site, navigating away from the page and returning causes the survey configuration to not load. The survey appears blank or fails to display its previously configured data.		

Site grid

Description	Ticket	Severity
In the Finalize bucket, the Survey results column does not sort in ascending or descending order as designed.	SEL-21038	3

Site portal

Description	Ticket	Severity
The site profile does not display the Networks menu item even when the site has an associated network.	SEL-22287	3

User interface

Description	Ticket	Severity
The Create new workflow page includes a markup error (i.e., a heading attribute that help screen readers interpret page content). This is an accessibility issue for the "Workflow details" heading, but it does not display a visible error message or prevent the page from working as designed.	SEL-20961	4
The account level Create new workflow template page includes structure and markup errors (i.e., a ARIA attributes that help screen readers interpret page layout and dynamic content). These accessibility issues do not	SEL-19974	4

Description	Ticket	Severity
display visible error messages or prevent the page from working as designed.		

Previously reported known issues

This section identifies issues reported prior to this current release.

- Data integration APIs
- Integration
- Site grid
- Study management

Data integration APIs

Description	Ticket	Severity
API GET for a studysite's profile returns an error instead of an empty object if the site profile is not found.	SEL-16321	3

Integration

Description	Tickets	Severity
When the maximum number of sites (400) are migrated in bulk to a new or existing study in Activate, the status icons for each site do not reflect a successful migration until the page is refreshed.	SEL-3630, SEL-3631	3

Site grid

Description	Ticket	Severity
Attempting to reorder columns by dragging and dropping a column header does not succeed on the first attempt. Instead, you need to drag and drop the column header twice for the column reorder to take effect.	SEL-21526	3

Study management

Description	Ticket	Severity
When a user adds a new study to a My Dashboard view	SEL-14970	3

Description	Ticket	Severity
with over 300 studies, the Study Name field in the "Add a new study to the account" modal does not immediately display entered characters, and users may experience a delay of several seconds.		

Deprecated known issues

Issues in this section are no longer applicable (e.g., does not occur, will not be prioritized for a fix, working as designed, and/or does not affect current functionality). We removed the item from the known issues list.

- Dashboards
- Site grid

Dashboards

Description	Ticket	Severity
On the Email invitations dashboard, when the browser zoom level is increased to 200%, the text label "Interested in study" is not visible in the horizontal funnel chart, even though the segment itself is still displayed.	SEL-21412	4

Site grid

Description	Ticket	Severity
In the Select bucket, with the Unassigned sites filter enabled, sorting in the Assigned User column is inconsistent with "unassigned" entries not grouped as expected and incorrect alphabetical sort order.	SEL-21591	4

Severity definitions

Learn more about how we describe the four issue severity levels.

Severity	Description
1	Your production use of the supported programs is stopped or so severely impacted that you cannot reasonably continue work. You experience a complete loss of service. The operation is mission critical to the business and the situation is an emergency.
2	You experience a severe loss of service. Important features are unavailable with no acceptable workaround; however, operations can continue in a restricted fashion.
3	You experience a minor loss of service. The impact is an inconvenience, which may require a workaround to restore functionality.
4	You request information, an enhancement, or documentation clarification regarding your software but there is no impact on the operation of the software. You experience no loss of service. The result does not impede the operation of a system.

Browser support

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

Our goal is to provide customers 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 patches or 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 version as of GA)**
Oracle Site Select application	26.1	Google Chrome and Microsoft Edge (Chromium)	None
Oracle Site Select site portal	26.1	Google Chrome and Microsoft Edge (Chromium)	Mozilla Firefox

Revision history

This 26.1 release note book's revision date history and part number list will develop over time as we make major, minor, and hotfix releases available.

Date	Part number	Description
07May2026	G53078-01	General Availability Release Notes