



# GATHERING TOOLS®

New features,  
enhancements  
and fixes.



# 2022

**Version 2022      p3.**

**Version 2021      p4.**

**Version 2020      p8.**



# VERSION



The 2022 version retains the architecture and the interface made for the 2020 release. It contains several stability fixes, updates external authentication protocols and implements publication parallelization.

## EXTERNAL AUTHENTICATION

OAuth2 authentication is deprecated and replaced by OpenIDConnect protocol support.

LDAP authentication now supports SSL transactions encryption (LDAPS).

External authentication can now be combined with GT authentication: on the same instance, allowing some users to use GT authentication while others could external authentication instead.

**LDAP**



## PUBLICATION PARALLELIZATION

From now on, document generation is multithreaded: allowing projects to take advantage of application server processor cores in order to achieve a higher throughput. GTAdmin interface allows you to limit the number of cores used in parallel.

# VERSION



The 2021 version is based on the architecture and interface of the 2020 version. It focuses mainly on automation, synchronization and conflict management during data updates. It also brings external authentication support, as well as several UI improvements.

## CHROMEOS PORT

GTAnswer is now available on Chromebooks.

## EXTERNAL AUTHENTICATION

In previous versions of GT, users were authenticated using proprietary authentication. This authentication allowed the manual or automatic creation of accounts and the implementation of a password policy.

While retaining the ability to manage users directly in the tool, version 2021 allows users to be authenticated through the corporate directory using LDAP or OAUTH2 protocols.

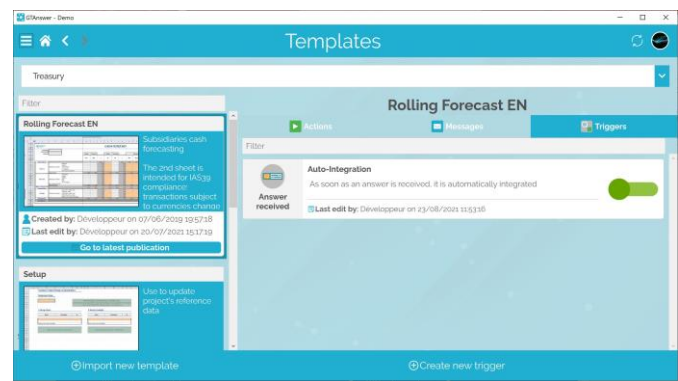


# TRIGGERS

Automation was previously represented by 2 features:

- API, which allows, using PowerShell or Python scripts, to execute GT actions from an external event.
- Combined actions, which allow to execute a sequence of actions with a click from the interface.

2021 release adds a new feature dedicated to automation: triggers. Triggers are agents that execute actions in response to a GT event: reception of an answer, validation, reception of all answers in a dedicated perimeter, etc.



Triggers can be set from the interface, without writing code.

Moreover, unlike combined actions, they can act on a specific data perimeter.

For instance, it is possible to detect the reception of a answer from a specific entity, and in turn, to trigger an action on this very same entity.

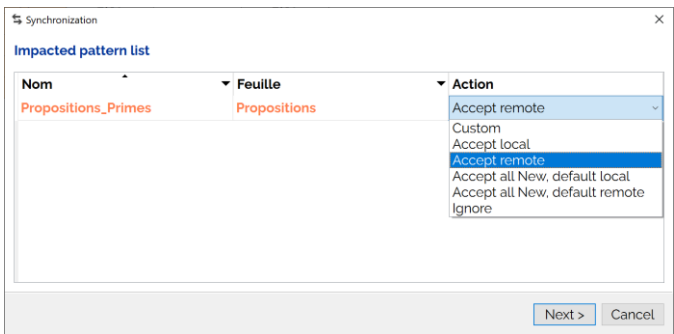
Triggers, like actions and messages, are linked to a model. They appear in a new tab to the right of messages

## ACTION CLOSE DOCUMENT

This action, intended to be used with triggers, allows to close or reopen the document of an entity.

## SYNCHRONIZATION

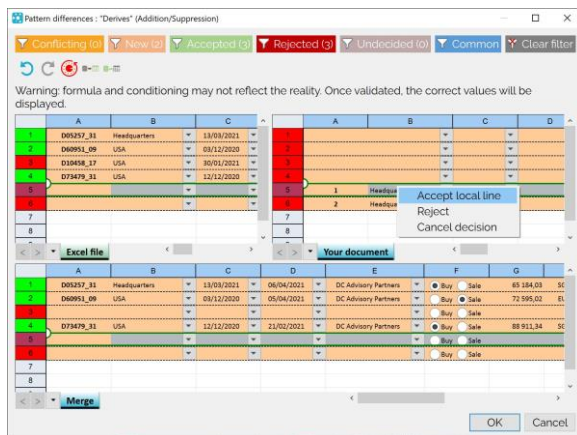
The 2021 version offers new synchronization features. Root, transpositions and read/write patterns can now be synchronized.



This implies that values entered by users can be in conflict with values from the database. This is why a dedicated management wizard is now available to help users solve conflicts.

The wizard shows here the list of patterns of the document. For each pattern, the user can set the import behavior, even managing conflicts value by value if he wants.





In custom mode, you can compare, for a given compartment, the values from the database and those of the current document and decide which ones you want to keep after the synchronization.

On the other hand, the read-only patterns, containing the reference data, are automatically updated without the user being able to interfere.

## EXCEL IMPORT BY KEY-FIELD

The operation of the Excel import in the patterns has been modified in the 2021 version, the import uses the pattern keys to import values, thus allowing to correctly position imported values whatever the sorting done by the users in their exported Excel files.

In addition, the Excel import offers the conflict management wizard, as for the synchronization.

## SIMULTANEOUS OPENING OF SEVERAL DOCUMENTS

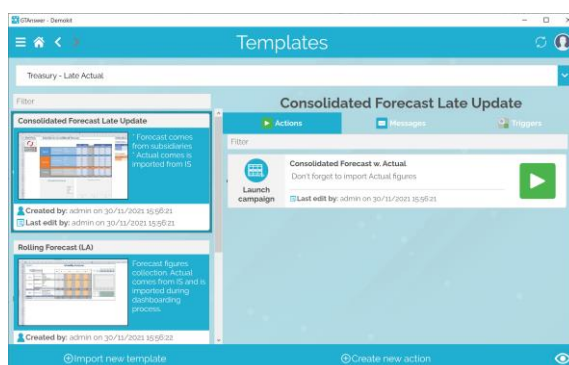
From now on, each document opens in a new window (Windows and Mac versions only). This makes it easier to switch from a document to another.

## HIDING ACTIONS

All actions can now be hidden. This allows to display only the actions that the managers can execute, the "technical" actions being grouped in combined actions

Hidden actions are not out of reach: they can be displayed by clicking on the "eye" located in the lower right corner of the interface.

Furthermore, it is always possible to prohibit the execution of certain actions so that they can only be launched as part of a combined action, via the API or a trigger.



# INTEGRATION ENHANCEMENTS

## NEW FILTERS

The integration actions offer 3 new filters:

- All answers except validated responses
- All answers except invalidated responses
- All answers except responses awaiting validation

## MANUAL SELECTION OF ENTITIES TO INTEGRATE

It is now possible to manually select the entities to integrate from the responses window.

## SAVE EXCEL TEMPLATES

Add	Edit	Delete
Name	Type	Subject
Lancement	Publication	Lancement de la campagne ..
Première réponse	First Answer	Réception de votre première ..
Réponses suivantes	New Answer	Réception d'une nouvelle réponse
Refus réponse, campagne fermée	Campaign closed	Refus de votre réponse : la ..
Fin de campagne	Campaign Closing	La campagne (MODEL_NAME) est ..

The document templates allow you to save the Excel files from which they are built.

This avoids the need to store the Excel templates outside the tool

When editing a template, it is possible to export the Excel template and open it from the application.

## RESET VALIDATION STATUS

A hidden menu allows to clear the validation information of a campaign.

## IMPROVED HYPERLINKS

In a GT document, hyperlinks can now point to a cell, not to a headers only.



# VERSION

# 2020

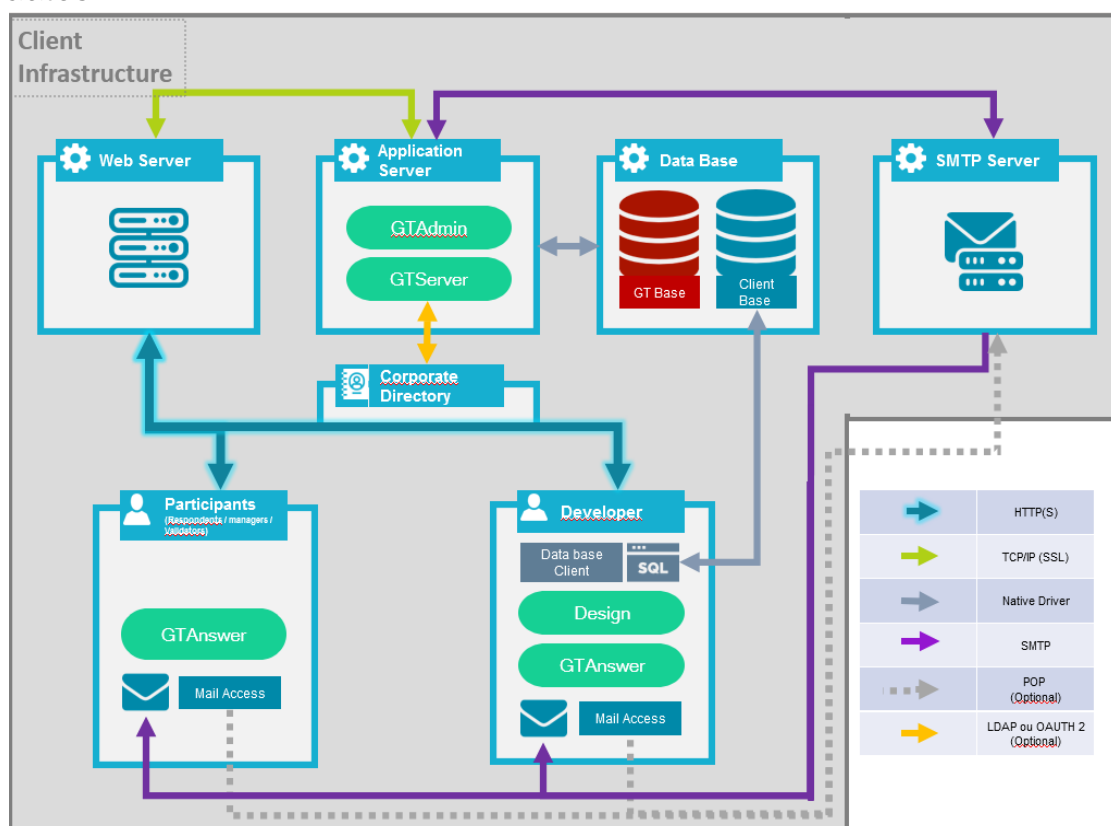
Version 2020 is a major evolution of the solution. Focusing on collaboration, it is based on a synchronized approach, whereas previous versions were primarily designed for the disconnected mode.

## NEW ARCHITECTURE, MERGING THE OLD “GTCLIENT” AND “ANSWER” MODULES

In the 2020 architecture, all users, including respondents, have an account and authenticate to the server via GTWeb.

However, it is still possible for users who do not have an account or who cannot access it to send data by e-mail. This is a "backup connection".

In addition, a new module "GTAnswer" replaces the GTClient and Answer modules.



Architecture diagram of the 2020 version



# COMPATIBILITY

The 2020 version is directly compatible with the 2018, 2019 and 3.95 versions.

# PLATFORMS

Version 2020 is available for Windows, MacOS, iOS (iPad only) and Android (tablets only)



# NEW ERGONOMICS

As the ergonomics for the users are totally new, we will detail it in the following paragraphs

# LOG IN

All users with an account access GTAnswer from the home screen where they are invited to authenticate.

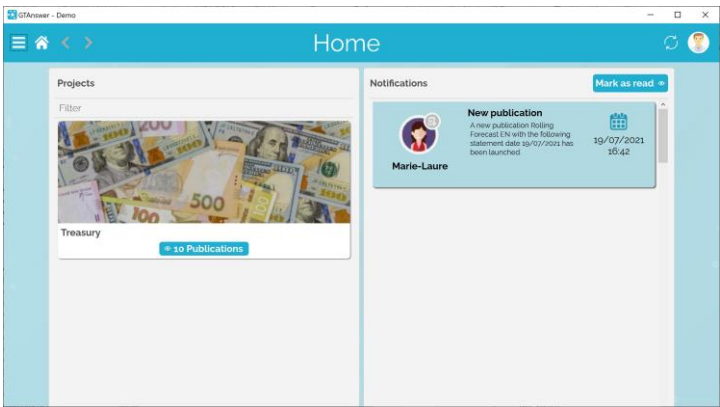


Authentication to the instance is proprietary: all accounts are securely stored in the GT database.

The instance allows secure access using a password and certificate policy (PKI).

# PROJECT – NOTIFICATIONS

Once logged in, users have access, according to the rights associated with their account, to projects and notifications that concern them.



Home page: on the left, the projects. On the right, the notifications

Notifications inform users of events concerning the entities that concern them (publications, new answers, validations, etc.), and allow them to access the referred documents.

These notifications are also sent by e-mail.

# TEMPLATES, ACTIONS AND MESSAGES

Developers and managers have access to the list of models in the project, and for each model, to the actions and messages attached to it.



Note that each model is represented by a capture of its first tab.

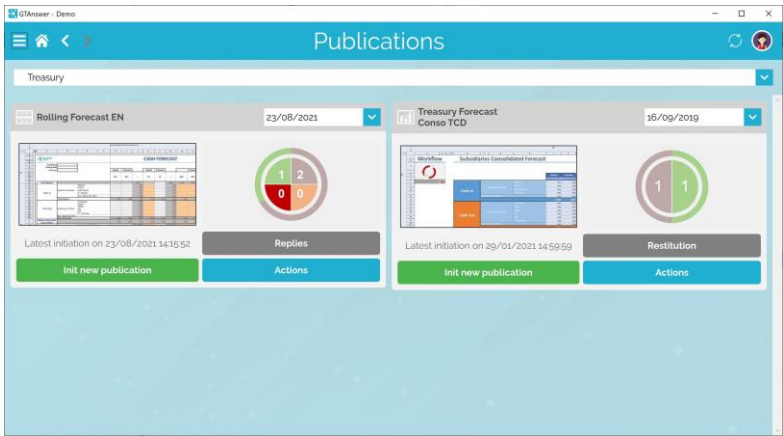
Moreover, the models can, like the actions, receive a description.

For each action, the interface specifies the last execution date.

A project contains a list of models and, for each model, the actions and messages that depend on it

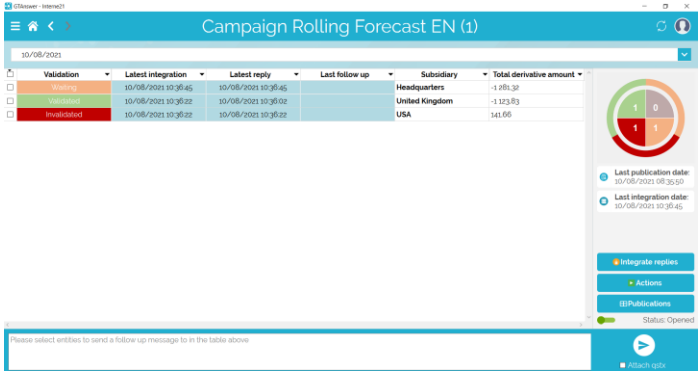
# PUBLICATIONS

With the 2020 version, workflows of forms and dashboards are no longer based on documents sent by email (even if this is still possible) but on publications to which the different users will have access.



Publications of a project. In this example, 2 collection campaigns and a dashboard.

By selecting a publication and a closing date, managers and validators can access the list of entities within their scope.



List of entities in a collection publication

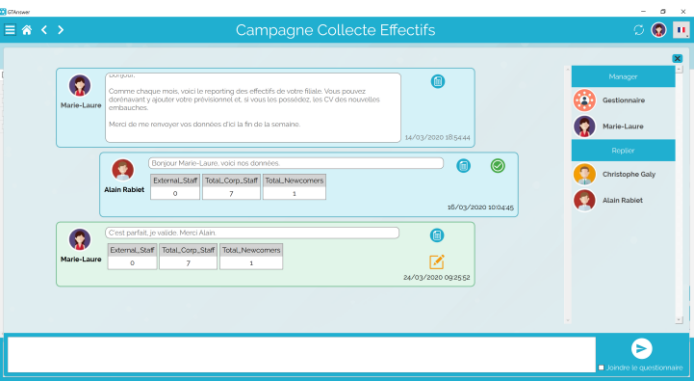
For each entity, in addition to the usual information, the date of the last reminder will be displayed.

Similarly, the last integration date is now available.

Finally, messages can be sent directly by selecting the entities, entering a message and clicking on the send button.

# DISCUSSION THREADS

For a given entity, all exchanges between users are now displayed in a thread. All users, regardless of their role, can now collaborate without having to send a document to each of them.



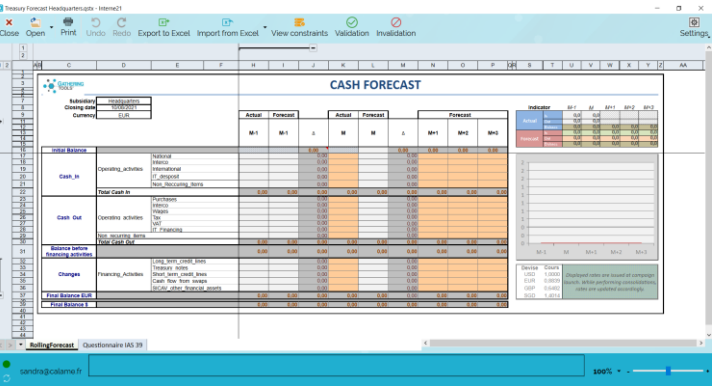
Discussion thread of an entity. All exchanges are reported and visible to the users concerned according to their respective rights.

As soon as an action is taken on an entity, all involved stakeholders receive an immediate notification to view the update in the thread.

With a click on an item, the referred document can be opened for consultation, entry or validation.

# DOCUMENTS

Documents are accessible from the notifications or by clicking on an item of the discussion thread.



Displaying a document

Once the entry - or validation - is completed, the document is closed, and the thread is automatically updated.

It is no longer necessary to perform a polling, it is done automatically to ensure that all users have the same vision.

# DISCONNECTED MODE – USERS WITHOUT AN ACCOUNT

When executing a publishing action, users without an account receive the document as an email attachment, as in previous versions.

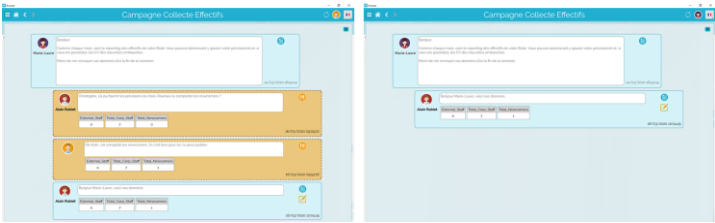
- Logged-in users can also export their documents in qstx format. This will allow them :
  1. To work disconnected mode.
  2. To transmit the document to another user
- By double-clicking on the qstx file, users can access the document and reply, as in previous versions.

# NEW FEATURES

The 2020 version, beyond its new architecture and its new interface, offers many new features.

## SHARED DRAFTS

The discussion threads promote collaboration by allowing all stakeholders of a project to share all updates for a given entity. However, beyond this global collaboration, we have observed that some users collaborate locally in the development of answers. This is why the 2020 release comes with shared drafts feature: users in charge of the elaboration of answers can save a partially filled document, no constraint will be checked during this saving.



Collaboration in the elaboration of a response: on the right, users see the drafts, on the left, the manager sees only the published responses.

Other users can then complete the document, and the discussion thread will be enriched by each of these successive contributions.

However, these drafts will not be visible to managers and validators.

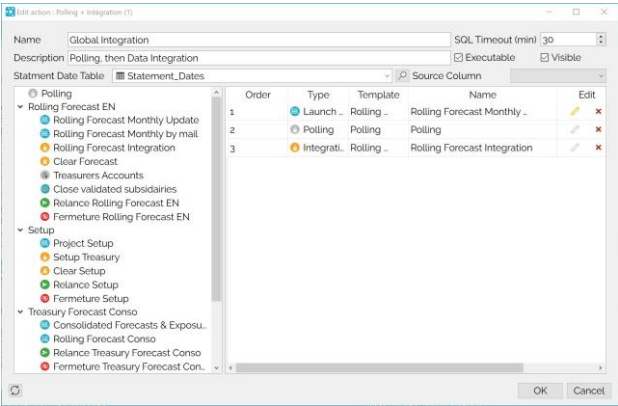
Once the document is completed, one of the users can then publish the draft, which will then appear as an answer in the thread.

## COMBINED ACTION

It is often the case that managing a project requires several actions to be performed in succession, in a specific order. Previously, the only option was to use the API, which required writing scripts.

This option still remains, but the 2020 version offers a new type of action: the combined action, which allows you to define a sequence of actions by simply dragging and dropping.

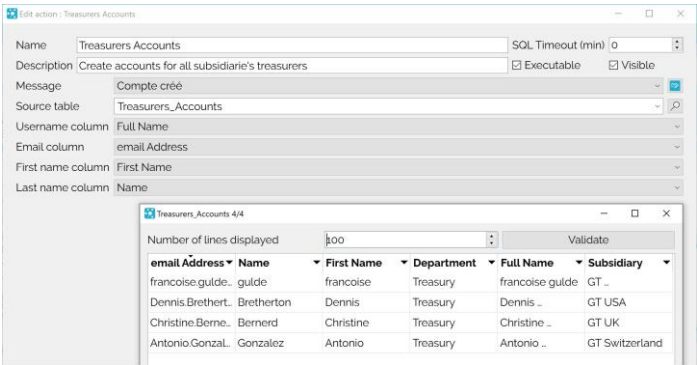
Conversely to classic actions, a combined action allows access to all models, and to all actions attached to them.



Design of combined action

# CREATE ACCOUNT ACTION

Since, by default, all users must have an account, the 2020 version automates their creation. Like previous versions, it is possible to create accounts using API. But the 2020 version goes further by offering a specific action.



Accounts creation

This action allows you to create accounts using data from the customer database.

It also allows you to automatically remove the rights of an account on a given model.

By combining the create account action and the publish action into one combined action, it becomes very easy to ensure that all users have an account.

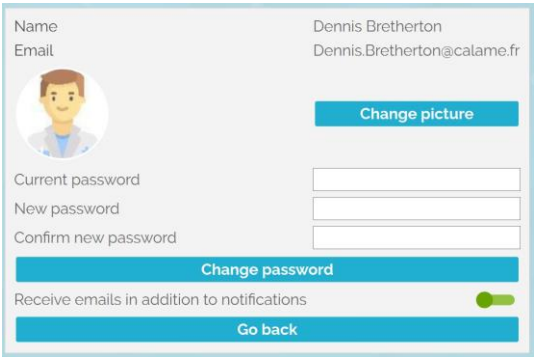
# ACCOUNT CREATION NOTIFICATIONS

When a user account is created (regardless of the method used), the user will receive a notification by email. This notification contains:

- A hyperlink that configures access to the instance on the user's computer and opens the application on the login window
- The user login
- A temporary password, which the user will have to change the first time he/she connects.

The user can then complete the configuration of his account by adding an image to his profile.

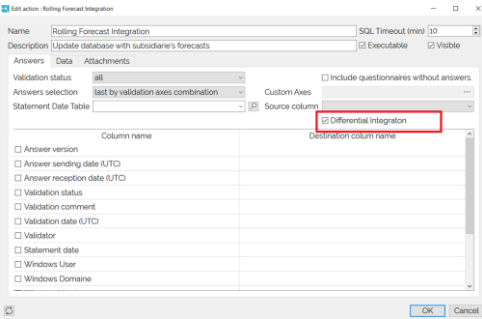
He can also choose to change his password and block the reception of email notifications.



User profile

# DIFFERENTIAL INTEGRATION

By default, the integration used to integrate all the entities. Starting with version 2020, it is now possible to activate the "Differential Integration" option. When this option is activated, the execution of an integration action stores the status of the responses of each entity in the publication.



Option of differential integration

This means that the next time the action is run, only the entities that have received new answers will have their data integrated.

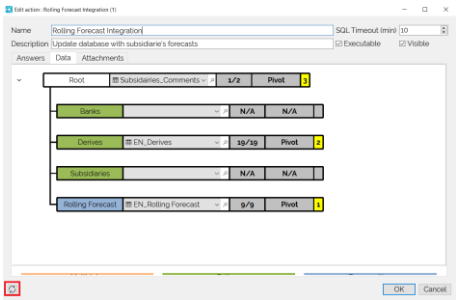
For publications with many entities and/or large documents, this option will greatly improve integration performance.

# REFRESH TABLE/VIEW LIST

In previous versions, tables and views of the database were only refreshed when an action was opened.

It is now possible to refresh the content of the database directly when editing an action.

This allows you to take into account the modifications of the tables / views of the database without having to close and reopen the actions.



Button to refresh the tables / views of the database

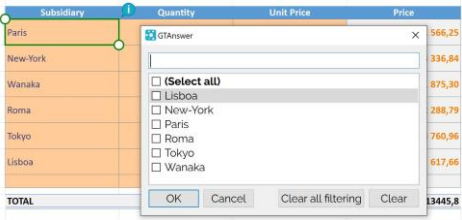
# AUTOCOMPLETION IN PATTERNS

	A	B	C
7		Derivative #	Name of contracting entity
8			
9			
10		Internal - AB142	
11		Internal - AB423	
12		Inte	
13		Internal - AB142	
14		Internal - AB423	
15			
16			(Please add lines as needed)

When entering data in a pattern, once the first characters have been selected, the list of similar elements already present above and below the cell is proposed. The "TAB" key is used to validate the chosen element.

# FILTERS WITH SEARCH IN PATTERNS

The pattern filters now include a search box. When you enter data in this zone, only the elements of the filtered column containing the character string entered are displayed.



Filtre avec recherche