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Administrative cooperation and Member State networks

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IMI System - Version 4.0

Release Notes

1. INTRODUCTION

1.1 Purpose

The purpose of the *Release Notes* is to communicate the most relevant new features and changes in the current release of the IMI System - Version 4.0.

1.2 Definitions, Acronyms, and Abbreviations

PQ = Professional Qualifications Directive, SD = Services Directive, PW = Posting of Workers Directive
CA = Competent Authority, LA = Legislative Area, MS = Member State LDA = Local Data Administrator,
DA = Data Administrator

2 ABOUT THIS RELEASE

Version 4.0. is a major Production release of the IMI software which includes several new functionality, such as a common CA search module, request splitting and copying functionality. The system now also allows forwarding a request after acceptance (in status Request Accepted), the change of a selected request coordinator for authorities which are linked to more than one request coordinator. In addition the release includes several improvements and minor bug fixes as reported in these Release Notes.

3 CHANGES AND NEW FEATURES

The table below contains a list of the changes that have been introduced in IMI Version 4.0.

| New functionality | | |
|-------------------|--|--|
| # | Component | Description |
| 1 | Information requests Request splitting | New functionality that allows the Responding Authority of an information request to split the request by selecting some questions and forward them to another authority in its own MS. In other words now the Responding authority can forward also part of a request it has received. Available to Request Handlers of the Responding Authority in statuses: Request sent / forwarded awaiting acceptance, Request accepted. |
| 2 | Information requests Copying a request | New functionality that allows the users to easily create a new request based on an existing one. The user needs to select which parts of the "old" request should be copied to the "new" one. Available to Request Handlers of the Requesting and Responding Authorities in all statuses (including closed requests). |
| 3 | Information requests Forwarding an accepted request | New functionality that allows the users to forward a request after acceptance, if it was accepted by mistake. Available to Request Handlers of the Responding Authority in status Request accepted. |
| 4 | Information requests Changing the selected request coordinator | The new functionality allows the request handlers to change the selected request coordinator to another linked request coordinator. Available to Request Handlers of the Requesting and Responding Authorities in all open statuses, but only if their authority has more than one linked request coordinator. |

| New functionality | | |
|--------------------------|---|--|
| # | Component | Description |
| 5 | CA search New common CA search module | <p>The system now includes a harmonized search module for CA search. This module is called from all functionality that requires a search for a Competent Authority:</p> <ul style="list-style-type: none"> ▪ (General) Search for a CA ▪ Create new Information request ▪ Forwarding, splitting an information request ▪ CA Data management (including search for Validating / Access / Link Coordinators, Linked authorities, search for Self-registered authorities awaiting validation) ▪ Register Data Management (search for a Register owner / manager) ▪ Send e-mail to authorities functionality ▪ Manage Alert recipients <p>The harmonized CA search now also returns LIMICs, SDIMICs and NIMICs in the search result if the user searches for authorities by specifying a LA specific keyword, profession or service activity. This is because these coordinators by default are linked to all LA specific data. Such authorities can be excluded from the search result by setting the "Include authorities with general horizontal competence" to NO.</p> <p>The harmonized search module offers additional criteria to previous searches:</p> <ul style="list-style-type: none"> ▪ <u>In all CA searches</u>: Include / exclude in the search results authorities flagged for "General Horizontal Competence" ▪ <u>In all CA searches</u>: When searching for an authority in MS with regional structure a field Region is now available (currently applicable for Germany, Spain and Poland) ▪ <u>When creating / forwarding information requests</u>: Search by LA related criteria: Keywords / Professions / Service Activities ▪ <u>When managing coordinated authorities</u>: Search by e-mail address <ul style="list-style-type: none"> - searches on all e-mail addresses registered for an authority, including those registered for the authorities' users - allows coordinators to check for which authority an e-mail address is registered (e.g. to locate a user in IMI by his / her e-mail address) <p>The "CA search module" is called:</p> <ul style="list-style-type: none"> ▪ Directly by menu items (e.g. Search for an authority) ▪ By clicking on the "Search for authority" button (e.g. Request creation) ▪ By clicking on the magnifying glass on CA data management screens (e.g. when searching for an Access Coordinator) ▪ By clicking on the Select Owner / Change Managing Authority button in register data management ▪ By clicking on the "Manage Recipients" button in Alerts <p>The (General) Search for a Competent Authority is available to all users. Other CA searches are available depending on user rights.</p> |

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| 6 | CA data management Regional structure | <p>A structured mandatory fields "Region" has been introduced for authorities of MS with regional structure.</p> <p>Currently introduced for Germany, Spain and Poland.</p> <p>Authorities with national competence in these countries can be linked to the "pseudo" region * National competence.</p> <p>The functionality concerns LDAs and DA of the regional MS, when managing authorities' data. As a search criteria the field is available for all IMI users when searching for an authority in regional MS.</p> |
| 7 | Send e-mail to authorities E-mail reminders | <p>Three new structured e-mails have been introduced to the system:</p> <ul style="list-style-type: none"> ▪ Reminder (to authorities) to close a request ▪ Reminder (to authorities) to answer a request ▪ Reminder (to authorities) to accept a request <p>This is to help coordinators to follow up pending IMI cases.</p> <p>Available to DAs of IMI Coordinators</p> |
| 8 | CA data management (Coordinated authorities) English Informal Title | <p>It is now also possible to directly enter the English translation of the authorities informal title. The provided field is optional, and can be filled in when a new authority is registered in IMI. (Note that it does not concern already registered authorities, for which the English translation of the informal title is already available in IMI.)</p> <p>Available to DAs of IMI Coordinators, LDAs of the authority</p> |

| Changes to the user interface | | |
|--------------------------------------|---|---|
| # | Component | Description |
| 9. | New user interface for CA search | The user interface of the harmonized CA search has been developed with the new component library (earlier only used for registers) |
| 10 | Default result of CA searches | No default result is displayed for CA searches. The system now only displays the results after the user has set the criteria for the different CA search. |
| 11 | Improved display of the result of CA searches | <p>The results of the CA search are now displayed:</p> <ul style="list-style-type: none"> ▪ On a separate screen ▪ In a paged mode (to ensure better performance) ▪ With a preview of the authorities data (to organize better the displayed information and to be consistent with register searches) |
| 12 | Improved display of authority data | <p>The details of Competent authorities are now displayed on different tabs also if opened from the (General) Search for competent authorities functionality.</p> <p>The new display of CA data is available:</p> <ul style="list-style-type: none"> ▪ When CA data is opened from the (General) CA search ▪ When CA data is opened from a Register's full view |

| Additional improvements and Bug fixes | | |
|--|---|---|
| # | Component | Description |
| 13 | CA data management "Edit" button | The Edit (authority details) button to manage the coordinated / own authority's data is now only displayed on the tabs which are editable. (I.e. the button is no longer available on the "Registers" and on the "Users" tabs. [End user reported problem] |
| 14 | CA data management (Coordinated authorities) Deletion of inactive users | It is now always possible to delete an authority's first user after having registered a new user. Previously the system only allowed this action if the authority had one active LDA. [End user reported problem] |
| 15 | Registers full view Telephone number of the owner | The telephone and fax country codes are correctly displayed if the owner authority is not registered in IMI [End user reported problem] |

| Inactivated functionality | | |
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| # | Component | Description |
| 16 | Information requests Feedback e-mail | The feedback e-mail sent to authorities after the closure of a request has been temporarily inactivated due to the update of the feedback form. |
| 17 | Information requests Partial reply | Based on end user feedback the "send partial reply" functionality has been inactivated. The functionality was rather confusing. A new functionality to provide partial information before sending a full reply is currently under development. |

4 IDENTIFIED BUGS AND PROBLEMS IN THE RELEASE

- (1) **The translations of the new screen messages** are not all available. They will be uploaded to the system as soon as received from the Commission Translation Services.
- (2) **The navigation from the General CA search and the Manage other authorities functionality is limited.** The user can only go back to the homepage (by clicking on the house icon). This problem will be fixed with the new IMI Homepage and navigation in V.5.0
- (3) **When changing the Validating Coordinator of a CA / LIMIC the system does not always display all the potential Validating Coordinators.** The issue will be fixed in V.5.0. If in the meantime users encounter this problem (I.e. they would like to change the Validating Coordinator, but they cannot) the COM IMI Helpdesk should be contacted to do the change.
- (4) **When copying a request questions about the attached document are not copied.**
- (5) **When managing recipients of multiple alerts the system does not always adds all the selected recipients.** The issue reproduce if recipients of several alerts are managed during the same session.

Foreseen Fix Version of the bugs: V.5.0 (Q4 2011 / Q1 2012)