AutoIND

February 2025 Release Notes

Data Tags
Publishing v1
Data Room Exploration
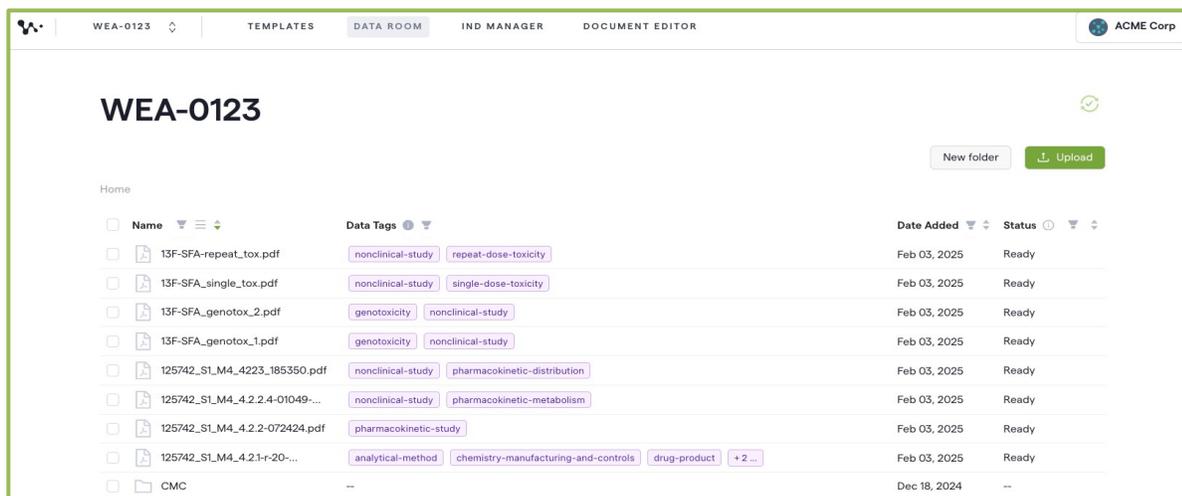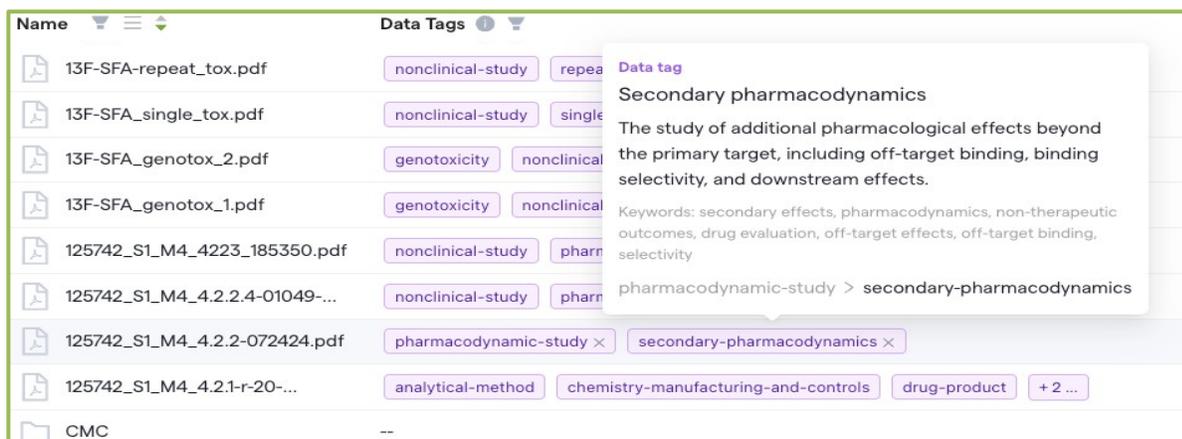
Table of Contents

DATA TAGS

To more effectively categorize and use source data for generation, each file in the Data Room now contains data tags. Instead of generating entire sections with many source files, data tags enable content generation of individual parts of a section using only the most appropriate files or source sections as inputs. This offers greater flexibility when using content templates and providing greater control over the type and length of generated content.

Categorize Source Files with Data Tags

In the Data Room, every uploaded file will be automatically assigned 1 or more data tags after processing. Tags are automatically assigned based on the content inside the file. Tags range from more general & broad categories, such as @nonclinical-study, to more granular and specific, such as @container-closure.

Hover over any tag to see a brief description and a set of keywords used to auto- assign the tag to files. Additionally, if the tag is a child of a broader category tag, that connection is also displayed.

The data tags control which files will be used to generate different IND sections (based on the templates for each section) so it's important to review the tags on each file. Tags can be added, removed, or changed on the Files tab of the Data Room, or when previewing individual files.

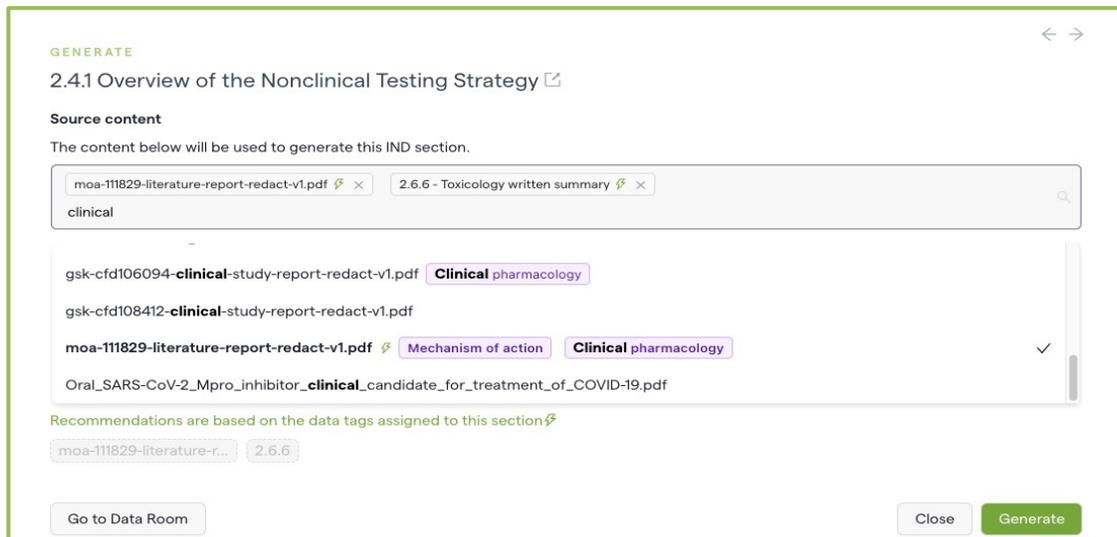|				Jan 30, 2025	Ready
analytical-method-validation	chemistry-manufacturing-and-controls	drug-substance			
control-of-materials ✕	drug-substance ✕	reference-standards ✕	+ Add	Jan 31, 2025	↗ Preview ⋯
control-of-materials		✓		Jan 31, 2025	Ready
drug-substance		✓		Jan 31, 2025	Ready
reference-standards		✓		Jan 31, 2025	Ready
analytical-method				Jan 31, 2025	Ready
analytical-method-validation				Jan 31, 2025	Ready
batch-analysis				Jan 31, 2025	Ready
batch-manufacturing-information				Jan 31, 2025	Ready
batch-specifications				Jan 30, 2025	Ready
pharmacokinetic-absorption	pharmacokinetic-study			Jan 30, 2025	Ready

Use Unique Source Content for Different Parts of Templates

Content Templates are now even more flexible and valuable, as each individual part, or "content block" (displayed in blue text), of the template can be assigned one or more data tags. These tags determine which source data will be used to generate the output for that part of the document. This enables greater control over output content, such as using scientific literature for background details in the first paragraph of a document or incorporating previously generated content (e.g. Section 2.6.2 and 2.6.4 into a summary section.

Important note: when data tags are used to determine source file data, only files containing ALL the selected tags will be used. In contrast, when tags are used to determine source sections, then ANY section containing generated content will be used.
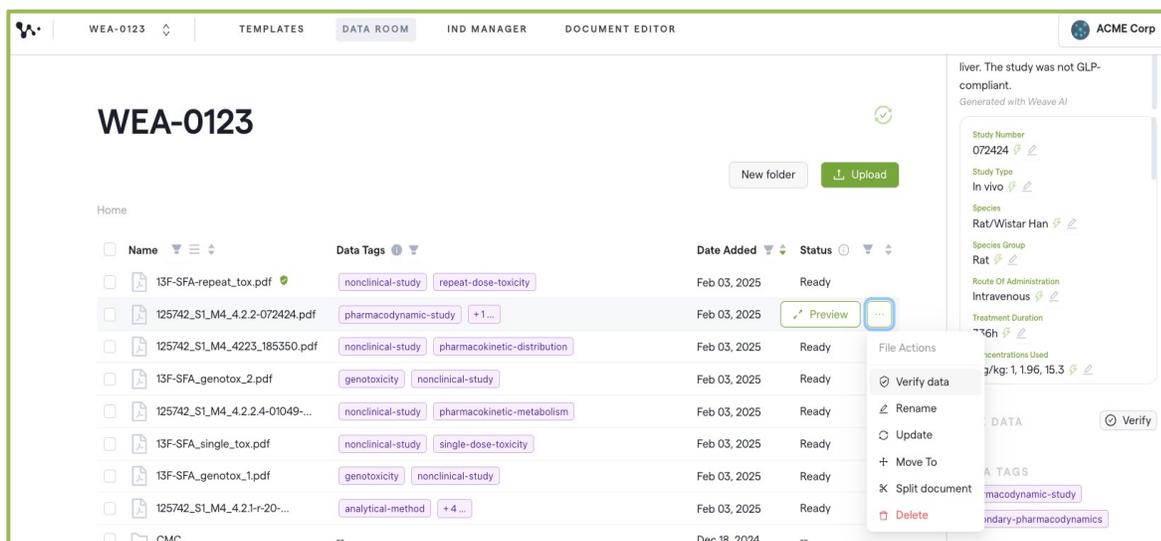
Select Files, Data Tags, or Section Inputs when Generating

When generating a section from the IND Manager, any files or sections that match the data tags included in that section's template will be automatically added to the generation modal. If the desired input files or sections aren't shown, the search dropdown can be used to find the most appropriate sources. The modal also includes quick links to get back to the Data Room (to update the tags assigned to uploaded files) or the specific section's template (to update the tags in the template).

Verify File Data in the Data Room

Once the file data and data tags assigned to a file have been reviewed, the file can be marked as "Verified". Any file that has been verified will show a green shield icon next to the filename.

To verify many files all at once, select the checkbox to the left of each file and click the "Verify data" button at the top.
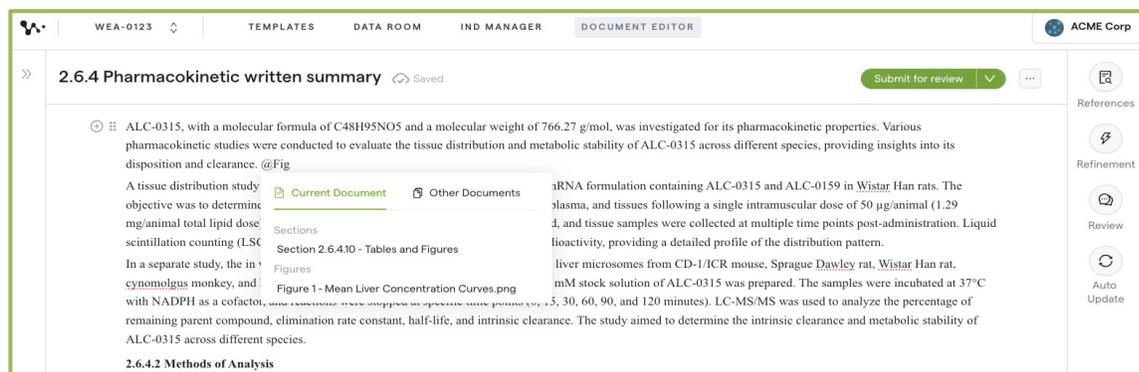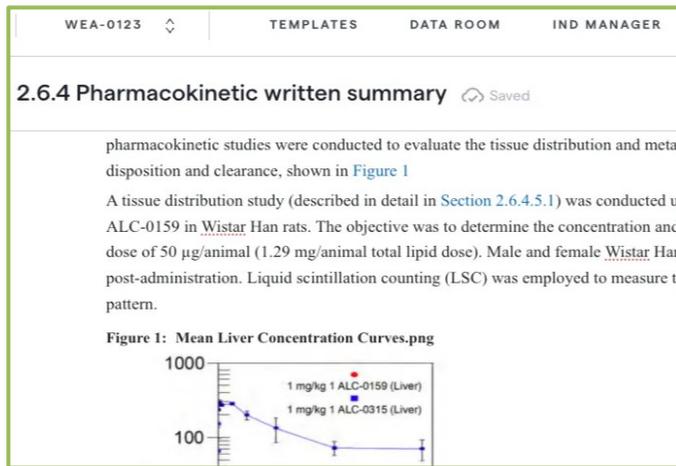

PUBLISHING v1

An important and required feature of every IND submission is the hyperlinks that connect content in one section of the IND to another (either within the same document, in other parts of the dossier, or to source files in Modules 4 & 5). Now those hyperlinks can be created while drafting each document. Additionally, these links are automatically updated when the content to which they link is updated (e.g. the relative numbering) which reduces time needed for link validation immediately prior to submission.

Inserting Links to Places Within the Current Document

To insert a link to a section, table, or figure within the current document, users can simply type the @ symbol to pull up a link insertion popup and then search for the desired target section, table, or figure. Selecting one of the search results inserts a hyperlink that remains updated even if the target content changes.

These links can be inserted into content sentences or into table cells, and clicking on them automatically scrolls the Document Editor to that section, table, or figure.

Important Note: while all inserted links are functional and remain updated in the platform, when the document is exported to a Docx file the text will be colored blue but without functional links.

Inserting Links to Places in Other Documents

To insert a link to a section, table, or figure in other documents across the dossier, users can select the "Other Documents" tab in the link insertion popup and then search for the desired targe t section, table, or figure.

Clicking on the inserted links will open the target section, table, or figure in a new tab for quick reference.

Inserting Links to Source Reports & Scientific Literature

To insert a link to a source report file or a scientific literature file in the Data Room, users can find these filenames in the "Other Documents" tab of the link insertion popup. Selecting the desired source file will insert a link using either the filename.pdf or a citation (e.g. "Johnson et al., 2021"). Clicking on the inserted links will open the full screen preview of the source file in the Data Room in a new tab.

Keeping Links Updated and Restoring Broken Links

Whenever the numbering for a target section, table, or figure changes, the links pointing to it will automatically get updated as well. If a section, table, figure, or source file gets *deleted,* then the link will change to @section, @table, @figure, or @pdf text, respectively. To fix these broken links, simply click on the text next to the @ symbol and it will open the link insertion popup again to select a new target.

Data Room Exploration

Data Room now has two new tabs in addition to Files Overview and Explore. The Overview tab shows a customizable tabular view of all the files in the Data Room with the ability to add custom columns. The Explore tab allows users to describe the data they want to see or ask open-ended questions about a selection of their files.

Overview tab

The new default tab in the Data Room, the Overview tab provides users with a tabular view of all of their files in the Data Room.

The Overview table is highly customizable!

- Filter and select which files (rows) to display data for in the first column.
- Sort and filter every single column.
- Select which default columns to display.
- Resize columns.
- Shift columns to the left or right.
- Create a custom column.

Custom columns allow users to extract the data they want, such as answering a question across all of their files. With just a column name and optional instructions, users can test out their AI-generated custom column on one file before applying to all files and adding the custom column to the Overview table. Custom columns can be edited or deleted and will be extracted from any new source files subsequently uploaded.

Clicking each file name in the first column of the Overview table will open the file's sidebar preview, where users can view the contents of the file or update column values.

Note that the Overview table is specific to both the user and the IND. This means another IND or another user's Overview table in the same IND will look different. Custom columns, however, are only IND specific and can be accessed by all users for that IND.

Explore tab

The new Explore tab is a place where users can learn more about their data in an open-ended way - whether it's to answer a question, extract a piece of data, generate a report... anything is possible!

Users describe in natural language what data they would like to see, then select a subset of their source files, before submitting to get an AI-generated response to their input. Users can then iterate on their input based on the previous response and continue to do so until they get their desired response.

A warning will appear if too many files have been selected above a certain file size imit. While the user can still proceed to submit, as more files are added above this limit, each file begins to be trimmed from the end during processing, leading to less accurate results.

Responses are not saved in AutoIND but can be exported to Word. Note that the Explore tab is in beta release since it's an experimental feature where responses may be incomplete or contain errors.

Files tab

The Files tab contains what was previously in the Data Room before the addition of Overview and Explore tabs. Users can continue to upload, preview, rename, update, move, split, and delete files.

New, Improved, Fixed

New

- Files uploaded to the Data Room are automatically assigned a set of data tags, which can be changed by users at any time

- The description and keywords for a data tag can be viewed by hovering over the tag

- File data can be marked as "Verified" for individual files or multiple files at once

- Template content blocks (displayed in blue text) can be assigned data tags, the combination of which define the source files or input sections used to generate that section of the template

- Typing @ symbol inside the document editor opens a popup for inserting links to sections, tables, figures, or source files both within the current document and to other documents.

- Links to scientific literature source files are automatically populated with standard citation format

- Links automatically update when the element they link to is changed (e.g. its relative numbering)

- When the target element is deleted, links to it change to @section, @table, @figure, or @pdf for easy restoration of the broken link

- Exported Docx files contain links as normal text (non-functional) with blue color

- When links to scientific literature source files are inserted, the exported Docx files include a List of Literature References section in the Table of Contents and at the end of the document

- Overview tab in the Data Room
  - Overview table of all files in the Data Room
  - Customizations of the Overview table (filtering of files/rows; on columns - sorting, filtering, resizing, shifting, selecting defaults)
  - Creation of custom columns, including testing one file before applying to all files

- Explore tab in the Data Room
  - Open-ended user input in natural language
  - Selection of multiple files from the Data Room
  - Warning if more files are selected above the file size limit
  - Export of the response to Word

Improved

- Instead of assigning a single Document Type to uploaded source files, a set of data tags will be automatically assigned to files once processed

- The content template Playground automatically detects and includes source content (files or sections) based on the tags included in the section's template. Changing any of the tags will require updating the source content to match the updated tags.

- When splitting a file, each split will be individually auto-assigned data tags after processing

- Upload data from any tab in the Data Room

Fixed

- Large source documents no longer cause content generation to stall

- You can no longer attempt to restore the current version from version history, which would hang