eCASE Audit

Release Notes

v5.11.0

November 2023

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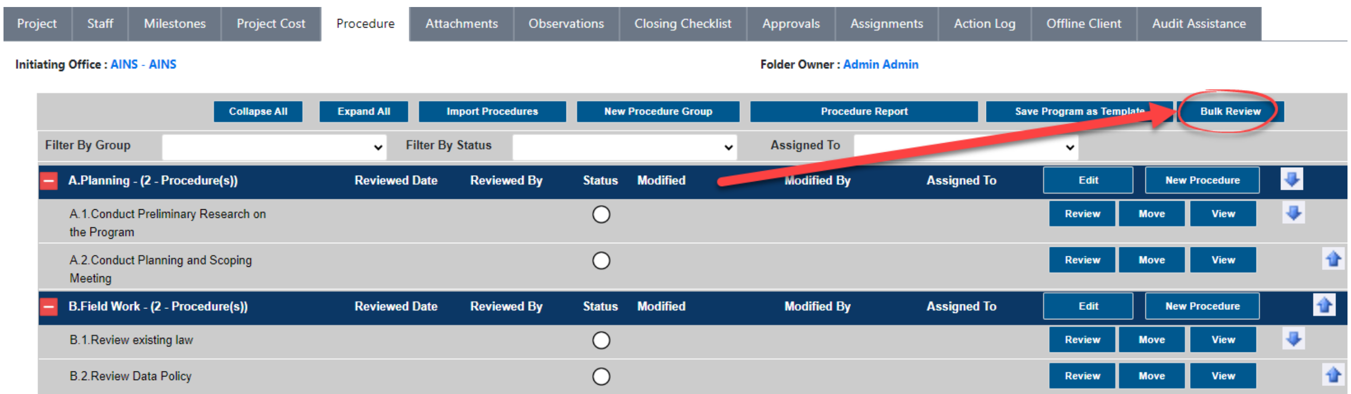
Contents

1 Product Enhancements

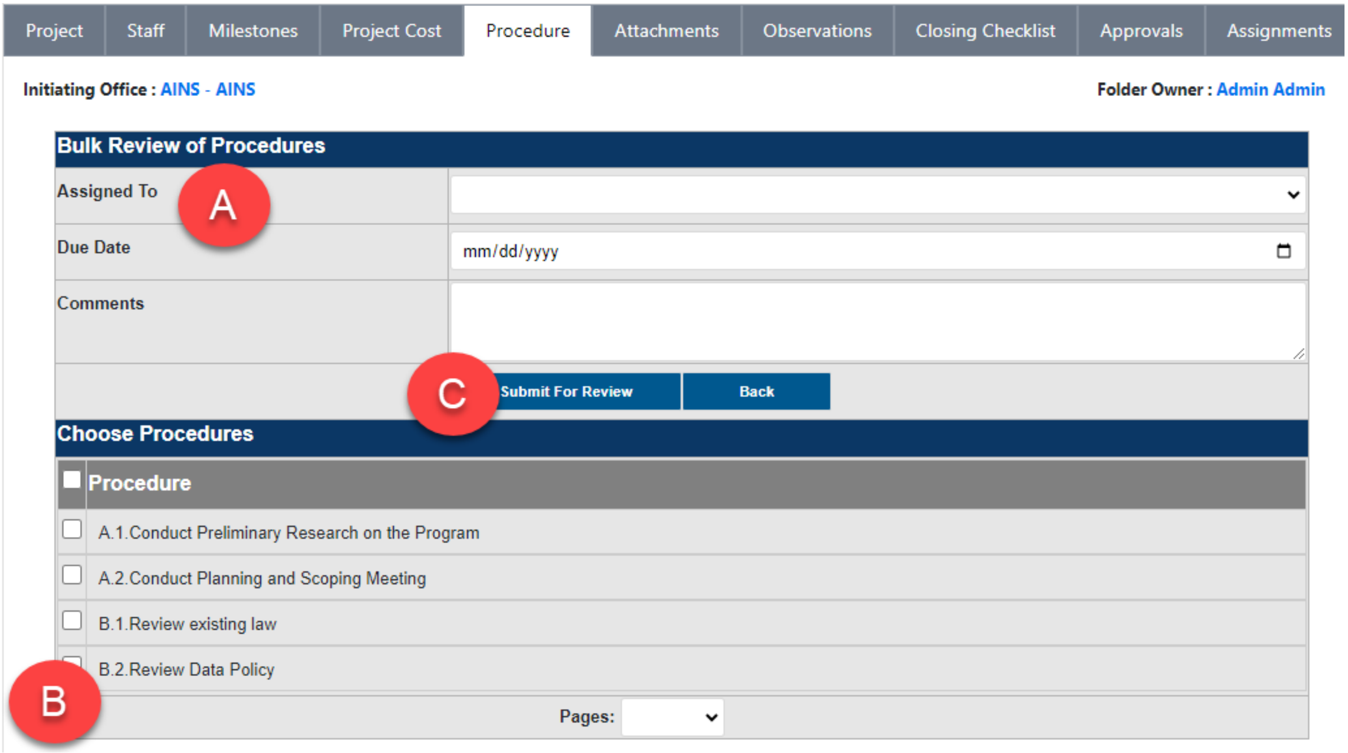
1.1 Bulk Assign Procedures

ID #32955

We added the ability to multi-select and bulk assign procedures, so you no longer need to individually assign procedure reviews. Navigate to the *Procedure* tab, then select **Bulk Review.**



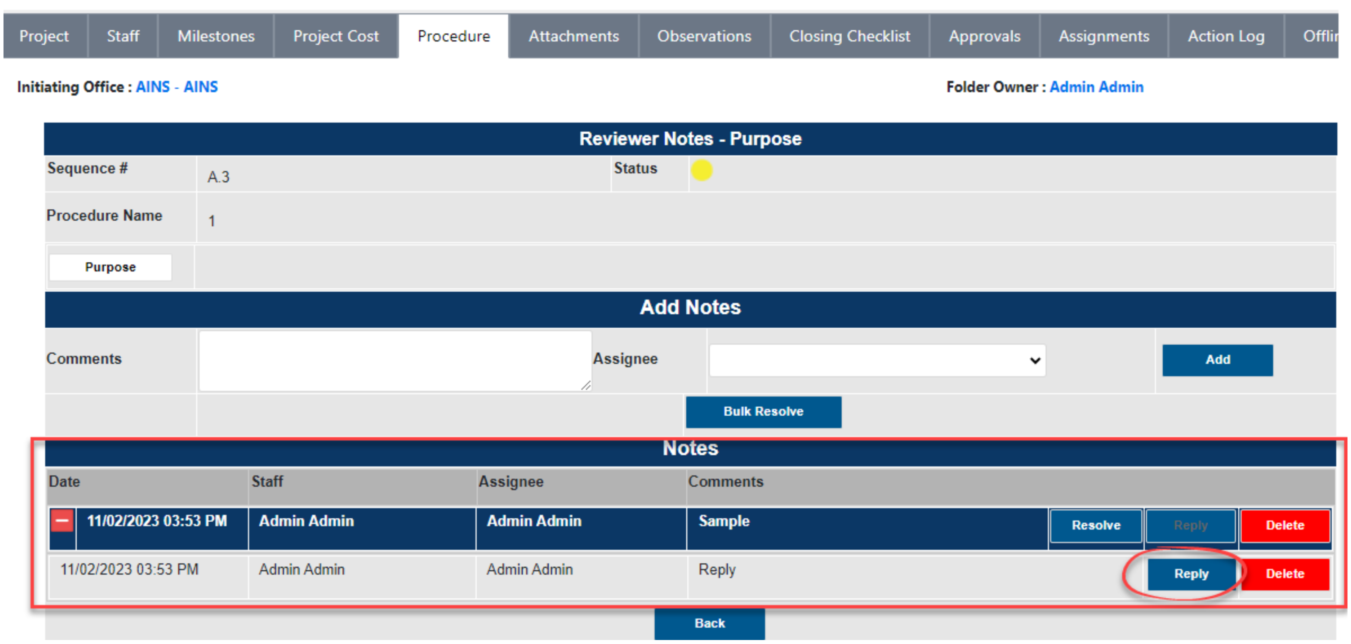
The *Bulk Review of Procedures* screen opens. Here, you can fill out the **(A)** *Assigned to*, *Due Date*, and *Comments* fields and click the **(B) checkboxes** next to the procedures you'd like to assign. Then, click **(C) Submit for Review** to complete the bulk assignment**.**



1.2 Respond to Notes

ID# 33029

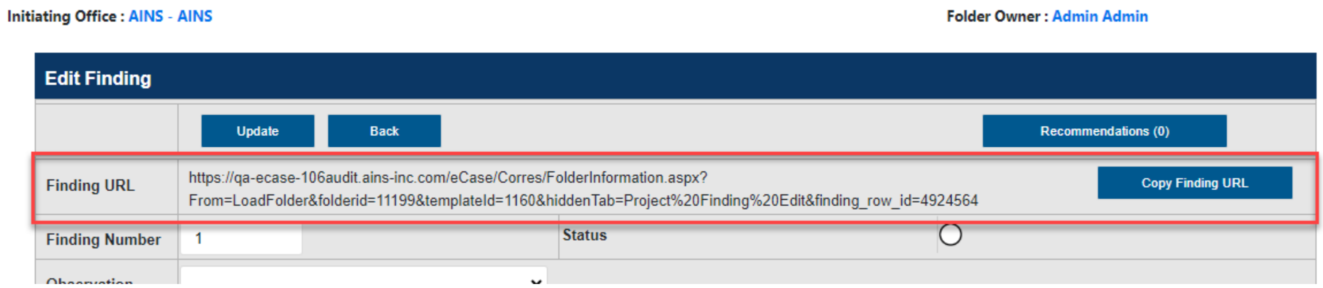
You can now respond directly to notes on the *Procedure* tab. This allows for streamlined correspondence between two auditors, or an auditor and supervisor. To submit a reply, locate the *Note* you'd like to reply to and click the **Reply** button.



1.3 Finding URL

ID# 33044

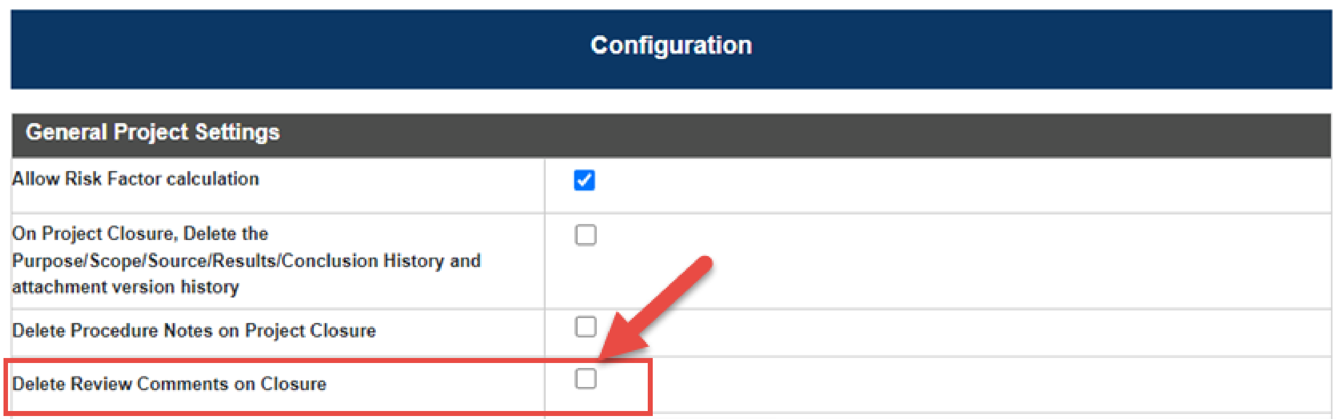
We've added a *Finding URL* and a **Copy Finding URL** button to the *Edit Finding* page so you can now easily copy, paste, and link findings to Procedure and Attachment workpapers.



1.4 Action Closure Comments

ID# 33703

We added the ability to remove Review Comments from the *Action History* log upon project closure. The option can be turned on and off in the *Configuration* tab (**Main Menu > Configuration**) as shown below.



1.5 New Terminology Configuration Options

ID# 33806, 33807, 34801, 34808, 34810, 48821

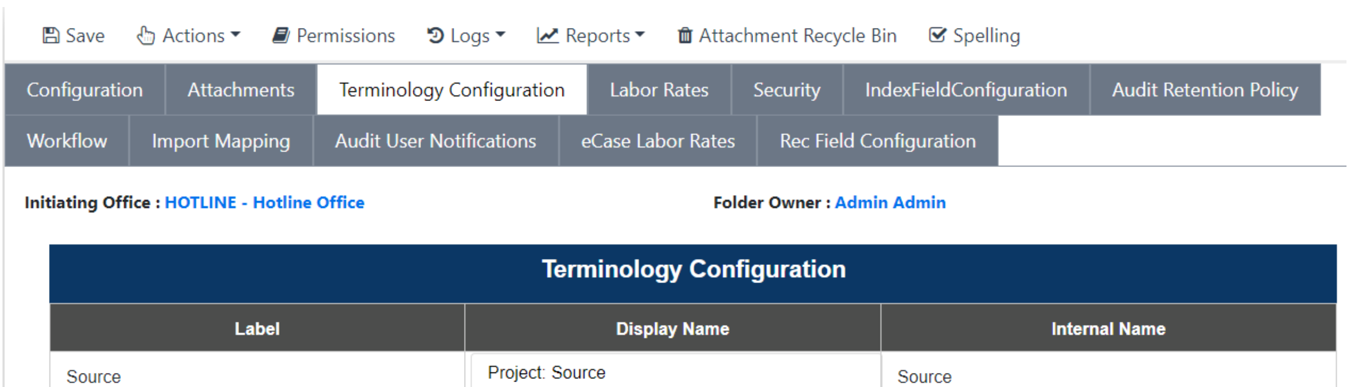
We've added some new configuration options to the *Terminology Configuration* tab (**Main Menu > Configuration > Terminology Configuration**).

You can now customize the following Table Headers:

- Project
- Profile
- Likelihood
- Impact
- Comments

You can also update display names for:

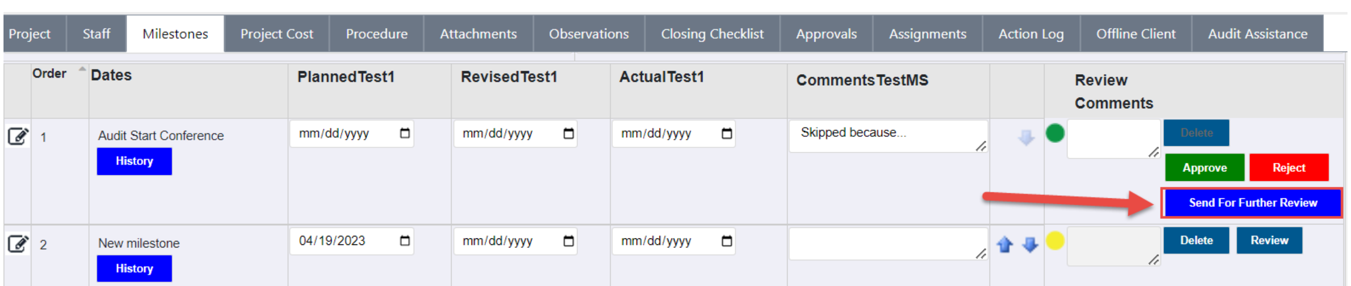
- Recommendation Text
- Recommendation Number



1.6 Allow Unlimited Escalations in Workflow

ID #36128

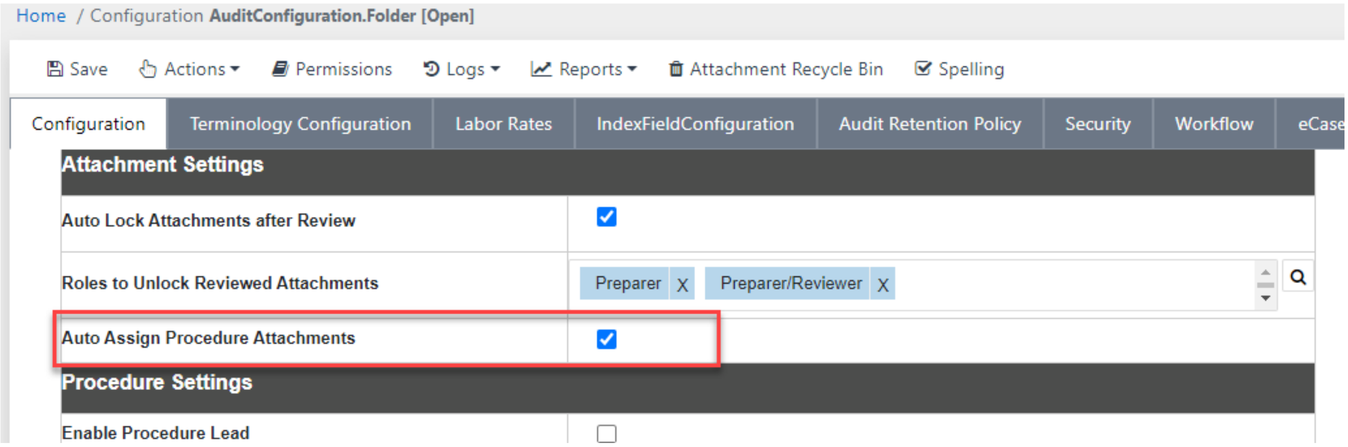
The **Send for Further Review** button now remains available on *Procedures*, *Attachments*, *Findings*, *Milestones*, and *Close Checklist* groups so you can escalate the task an unlimited number of times. The button is active until an assigned Reviewer or Preparer/Reviewer clicks **Approve** or **Reject**.



1.7 Auto-Assign Attachments

ID# 36129

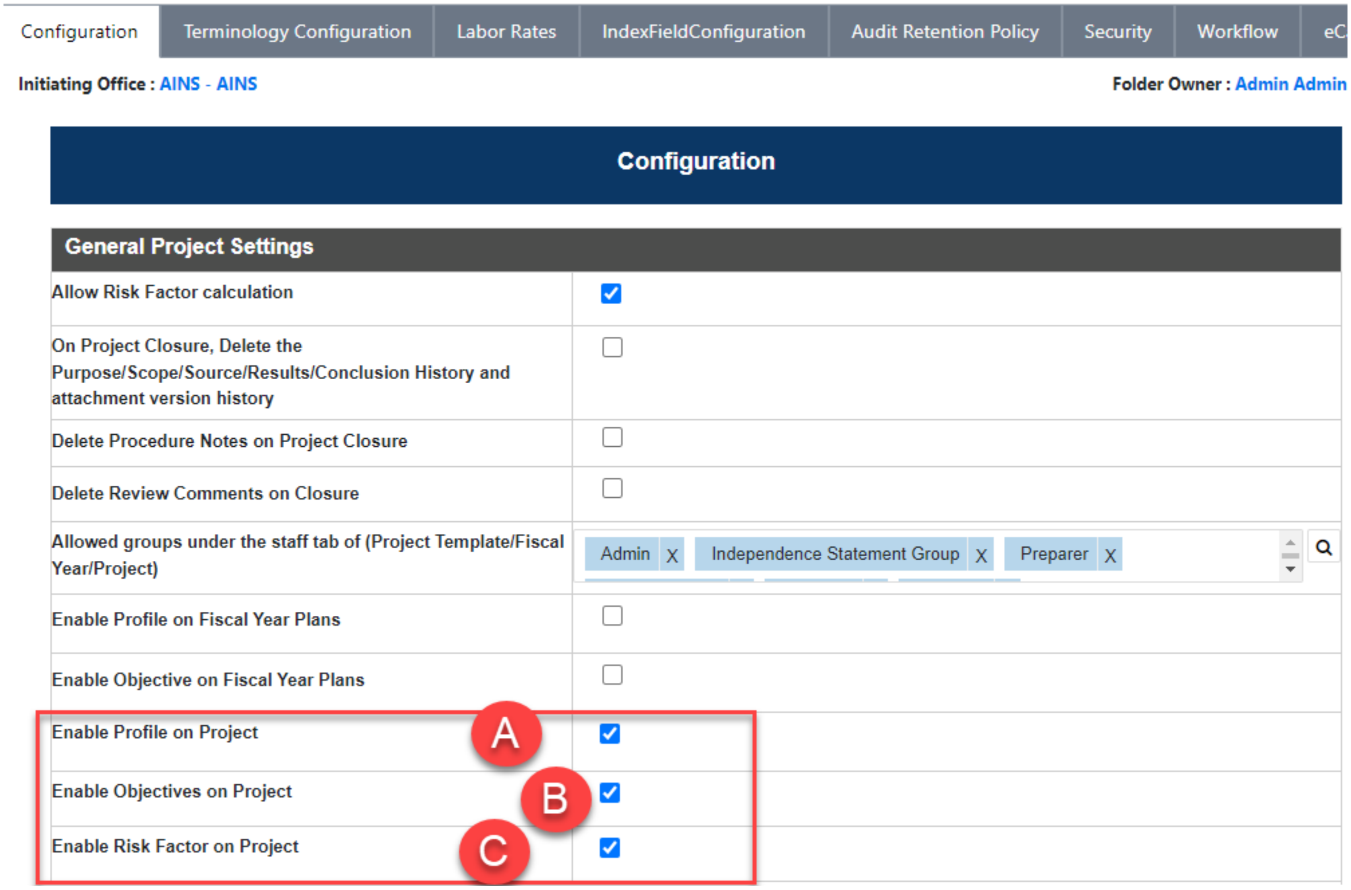
When a procedure is sent for review, associated attachments can now be auto assigned. This setting can be turned on/off under the *Configuration* tab, in the *Attachment Settings* section.



1.8 Configure Display of FYP Project Creation Form

ID# 48253, 48737

We've also added further customization options to the FYP Project Creation form, customizable via the *Configuration* tab. You can show/hide the **(A) Profile** and **(B) Objective** columns on Project views. You can also add risk statements to FYP Project Creation forms by checking the **(C) Enable Risk Factor on Project** option. When this option is checked, risk mapping multi-select fields will display on the form.



1.9 Finding Tab Display Name

ID# 48817

If you customize the *Finding* tab display name, the updated name is also reflected on all related form headers for added consistency.

2 Bug Fixes

The following bug fixes were applied in the latest version of eCASE Audit:

ID	Description
32410	Corrected a bug where canceling a procedure approval task in the *Assignments* tab would set the task status as Prepared, breaking the workflow.
34165	Resolved a bug where field terminology changed in *Configuration* would not update properly in the *Fiscal Year Plan* launchpad.
34237	Fixed a bug allowing users to resubmit Procedure Attachment Approval tasks that have already been sent for review.
34832	Resolved a bug causing duplicate attachments of projects completed from a template.
46176	Addressed a bug where attachments were added to the wrong folder of projects completed from a template.
51522	Addressed a bug causing incorrect information to populate in Folder Reports.
48929	A user encountered a data formatting issue while exporting a Crystal Report in Microsoft Excel (97-2003) Data-Only format. We resolved this issue and now this report data displays correctly when exported to Excel.