eCASE Audit

Release Notes

v5.12.0

December 2023
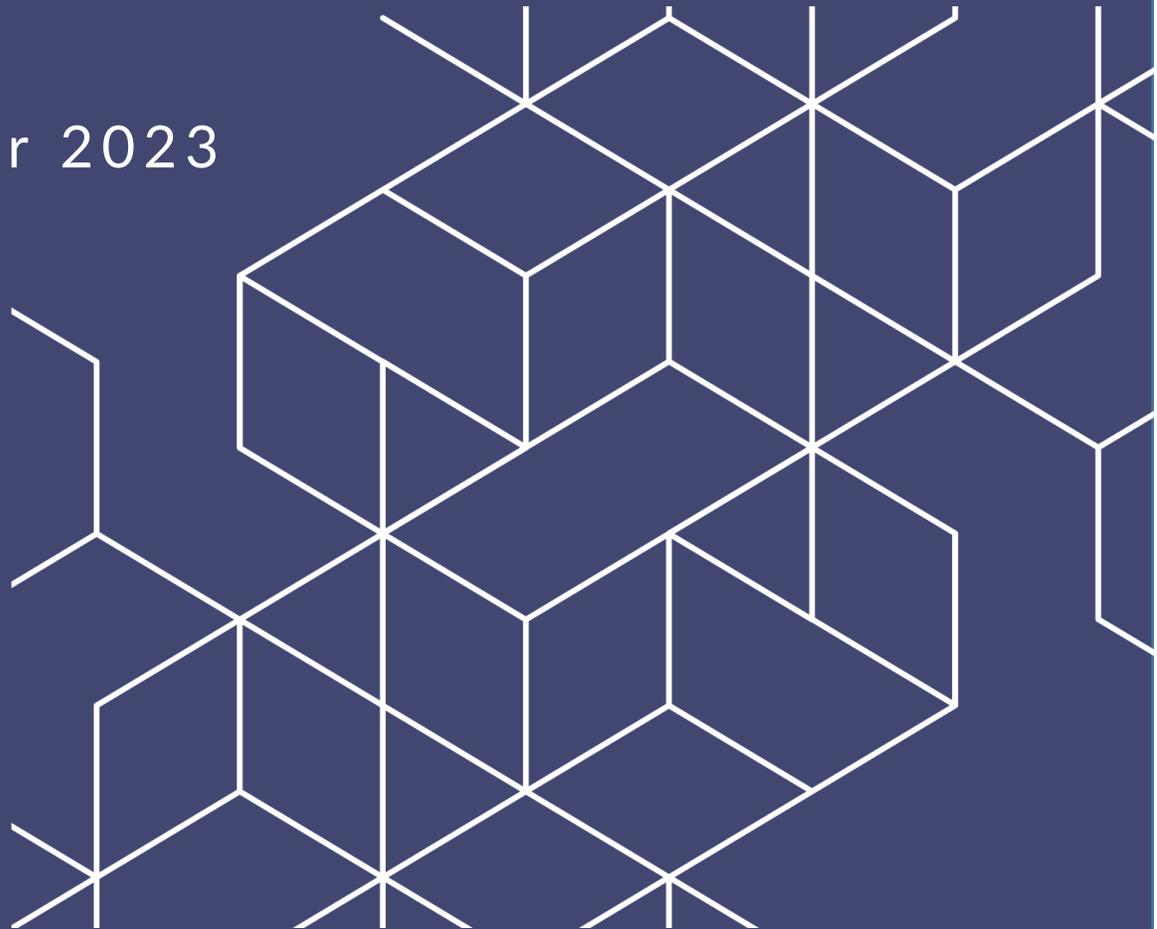
eCASE Audit 5.12.0 Release Notes

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1 Product Enhancements

The following new features were added to the latest eCASE Audit release.

1.1 New Risk Formula Configuration

ID# 50474, 51372, 51567, 56597

We've added a new tab to the Audit Configuration for *Risk Formula Configuration*. Within this tab, there are options for administrators to create a *Rating Scale* (from 1 to 10), a *Ranking Range* (including Minimum, Maximum, and Terminology), and a *Calibration Configuration*. Using these configurations, you can configure a unique Risk Formula using the defined scale, range, terminology, and calibration.

As part of the Risk Formula, you can also set a *Likelihood Weight* and *Impact Weight*, which define the relative weighting of each risk. For example, setting these fields to 50% each applies a multiplier of .5 to the likelihood and impact weighting for the risk factor. The combined percentage of these two fields must add up to 100%.

When the Risk Formula is applied, this is reflected in the Risk Factor at both the Fiscal Year Plan and Project levels. You'll see columns for both the numeric risk score as well as the associated risk rank for each risk factor added to the risk profile.

You'll also note a *Calibration Configuration* section, which allows you to add multipliers for risk taxonomy combinations to your risk formula. You can insert rows where you'll select a **Primary Taxonomy** and **Sub Taxonomy** then a **Calibration** figure (up to two decimal places). If this combination is selected for a risk statement, the risk score is then multiplied by that calibration number.

1.2   Show/Hide Overall Risk Score

ID# 53813

Within the *Configuration* tab (in the *Configuration* folder), there's a new option to **Show Risk Score on FYP and Project Risk Profile**. If this option is selected, the risk factor displays in both the Work Topic Risk Profile and the Project Risk Profile, as well as in the Risk Factor column on the Fiscal Year Plan launch pad. If unchecked, the risk factor does not display in these areas. This option is selected by default.

1.3 Taxonomies Relocated on Risk Factor Form Templates

ID# 56517

When viewing the risk factor template, Fiscal Year Plan risk factor profile, or a project risk profile, the columns are now reordered so the *Primary Taxonomy* and *Sub-Taxonomy* columns appear immediately after the *Risk Statement* column.

1.4 Risk Factor Terminology Consistency

ID# 53853

If a custom terminology is used for the "Risk Factor" this terminology is now reflected in the *Filter By Risk Factor* column. For example, if you are using the terminology "Risk Score" rather than "Risk Factor" this column will read *Filter By Risk Score*.

1.5 Fiscal Year Plan Terminology Consistency

ID# 55887

If a custom terminology is used for the "Fiscal Year Plan" this terminology is now reflected on the case creation page when creating a new plan. For example, if using the terminology "Calendar Year Plan" this updated terminology appears when creating a new Calendar Year Plan.

1.6 Audit Plan Summary Tab

ID# 52602

A new *Audit Plan Summary* tab is now available, where audit planning officials can see all projects created under a Fiscal Year Plan. This view is helpful for planning officials who are budgeting at the fiscal year level. Search and filtering options are available on this tab to help locate specific projects within a Fiscal Year Plan.

1.7 Tracking Closing Checklist in the Action Log

ID# 53416

Each Project's Action Log now tracks all modifications to the *Closing Checklist* tab. This includes adding a Close Checklist group, removing a Close Checklist group, adding a Close Checklist question, removing a Close Checklist question, or importing a Close Checklist question. These actions are now recorded in the Action Log along with the User who took the action, and the date/time the action was taken.

1.8 "On Audit Plan" Field Added

ID# 56518

On the Risk Factor Template, Fiscal Year Plan Risk Profile, and Project Risk Profile, a new field was added called "On Audit Plan." Use this field to indicate if a risk statement should be included on the audit plan.

This field is enabled by default and cannot be disabled; however, administrators do have the option to mark this field as required.

Field Configuration				
Field Name	Internal Name	Display in UI?	Is Required?	Disable in UI?
On Audit Plan	fyp_onauditplan	☑	☑	☐

1.9   Priority Observation Field Type Change

ID# 53862

The *Priority Observation* field (under the *Observations* tab) has been revised so auditors can select multiple values within the lookup. This allows for associating multiple tags to findings/observations if necessary.

1.10 Added Letter Template Element

ID# 54735

We've added an additional element ("B.1") to a customer specific "AAWP" letter template.

2 Bug Fixes

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

ID	Description
28606	Fixed a bug in which the comments on bulk approved/rejected documents would not populate in History.
54799	Resolved an issue in which Procedure groups in a Project Template *Attachment* tab would not remain in the correct order following Procedure import.
55236	Corrected a bug on the Time Report By Date in which indirect codes would not be included in the report.
55898	Resolved an issue in which terminology changed on the *Configuration* tab for the *Sensitive* checkbox on the *Project* tab would not update properly.
56321	Fixed a bug in which entering a percent symbol ("%") into a rich textbox on a form would make form buttons not clickable.
56574	Resolved an issue in which terminology changed on the *Terminology Configuration* tab for would not display properly on the *Configuration* tab or the Folder Report, despite displaying properly on the project.
57005	Fixed a bug causing duplicate attachments to appear in Projects created from a template.
57019	Fixed a delay occurring when attempting to make updates to Closing Checklist questions.

ID	Description
57061	Addressed an error message encountered when attempting to print the *Milestone Dates* tab from the *Actions* menu.
57167	Corrected a bug in which text added to a rich textbox in a table would not preserve the table format once saved.