

eCCase

Audit

Release Notes

v5.18.0

October 2024



OPEXUSTECH.COM

© AINS LLC, 2024

eCASE Audit v5.18.0 Release Notes

Notice of Rights

Copyright © 2024, OPEXUS, LLC d/b/a OPEXUS. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of the publisher: OPEXUS, LLC. For information on obtaining permission for reprints and excerpts, contact info@opexustech.com.

Additionally, all copyrights, confidential information, patents, design rights and all other intellectual property rights of whatsoever nature contained herein are, and shall remain, the sole and exclusive property of the publisher.

Notice of Liability

The information in this publication is believed to be accurate and reliable. However, the information is distributed by the publisher (OPEXUS, LLC.) on an “As Is” basis without warranty for its use, or for any infringements of patents or other rights of third parties resulting from its use.

While every precaution has been taken in the preparation of this publication, neither the author (or authors) nor the publisher will have any liability to any person or entity with respect to any loss or damage caused or alleged to be caused, directly or indirectly, by the information contained in this publication or by the computer software and hardware products described in it.

Notice of Trademarks

The publisher’s company name, company logo, company patents, and company proprietary products are trademarks or registered trademarks of the publisher: OPEXUS, LLC. All other trademarks or registered trademarks are the property of their respective owners.

Non-Disclosure Statement

This document’s contents are confidential and proprietary to OPEXUS, LLC. This document cannot be released publicly or outside the purchasing agency without prior written permission from OPEXUS, LLC.

Images in this manual are used as examples and may contain data and versioning that may not be consistent with your version of the application or information in your environment.

Additional Notice

Information in this documentation is subject to change without notice and does not represent a commitment on the part of OPEXUS, LLC.

Notwithstanding any of the foregoing, if this document was produced as a Deliverable or other work for hire under a contract on behalf of a U.S. Government end user, the terms and conditions of that contract shall apply in the event of a conflict.



Product Enhancements

Bulk Review Feature Improvement

ID# 83982

Users can now make selections across different pages of the Procedure when using the Bulk Review function.

Approval Actions From the Procedure Edit Form

ID# 84287

Reviewers are now able to submit Procedure attachments for review, approval, rejection, and escalation directly from the Procedure Edit form.

Attachments

| Doc ID | Name | File Name | Status | Assigned To | Comments | Edit | Review |
|----------|----------------------------|---|-------------|--|-------------|-----------------|---|
| B.8.21.0 | Test Procedure Attachments | 21_screenshots of the requested Observations.docx | <div></div> | <div>Admin Admin</div> <div>Cancel</div> | <div></div> | <div>Edit</div> | <div>Approve</div> <div>Reject</div> <div>Send for Further Review</div> |


Action History

| Action Date | Action By | Category | Status | Seq # | |
|---------------------|--------------|------------------|-------------|-------|--|
| 10/31/2024 11:45 AM | William Chen | General Comments | <div></div> | B.8 | Procedure with group and sequence # 'B.8' and with procedure name 'Test Procedure Attachments' and with due date " has been Created. |

Pages:

New Permissions Configuration: Attachments

ID# 88785

We've added a new permissions configuration option to give users who are not assigned to Preparer or Preparer/Review roles in the *Staff* tab permission to edit/review attachments. To make this change, Administrators can navigate to **Configuration > Configuration > Attachment Settings**. You can use the **Lookup**  beside the *Who Can Send Documents for Review?* and *Who Can Edit Documents?* fields to add more roles to these permissions:



| Attachment Settings | |
|--------------------------------------|---|
| Auto Lock Attachments after Review | <input type="checkbox"/> |
| Roles to Unlock Reviewed Attachments | Preparer X Preparer/Reviewer X |
| Auto Assign Procedure Attachments | <input checked="" type="checkbox"/> |
| Who Can Send Documents for Review? | Preparer X Preparer/Reviewer X Reviewer X |
| Who Can Edit Documents? | Preparer X Preparer/Reviewer X |

Procedure Field Mapping for Letter Templates

ID# 89021

We've added field mapping for Procedure data in Letter Templates, allowing you to reference specific Procedure details in templates. The following fields have been updated:

- Procedure Sequence Number
- Procedure Name
- Each Procedure from the respective Projects
- All Procedure elements within each Procedure
- All contents of each Procedure element

Contact Search & Filtering Improvements

ID# 89039

When conducting a Contact Search, you can now search and filter by Audit Organization Name.



Bug Fixes

| ID | Description |
|-------|---|
| 84787 | Resolved a bug preventing users from being able to close a project if an Attachment sent for review and in Prepared/Escalated state was deleted and purged. |
| 85059 | Addressed an issue regarding Fiscal Year Plan Work Topic rollover between Fiscal Years. |
| 86926 | Fixed a runtime error occurring on the Findings tab when users edited removed the Recommendation Number while editing a Recommendation. |
| 88522 | Special characters are now accepted in the Region JA field on the Project tab. |
| 89246 | Resolved a bug with the Procedure Report window. |
| 89919 | Implemented performance improvements for the Attachment Report. |
| 90511 | Addressed a bug impacting the Assigned To and Assigned By user assignments when Auto Assign Procedure Attachments was enabled in configuration. |
| 90539 | Resolved an error occurring when Reviewers rejected a Procedure deletion request on the Approvals tab. |

