

Ideagen Pentana 5.4 Release Notes

Generated on 06 February 2019 at 10:17

Headline Changes

Key	Type	Description
VIS-6405	Improvement	The "aggregation" Dashboard Widgets (e.g. "Manager's Audits") have been improved so they are now much more customizable. The end users can now pick which statistical columns appear and save each layout as a Tile to include on a Dashboard.
VIS-6698	Improvement	When a Task/Resource is modified in Retain those changes can now be synchronized back into Pentana (subject to new System Settings and appropriate restrictions).
VIS-8452	Improvement	Controls can now be linked to more than one Risk (within the same Process) and these so-called "Linked" Controls are handled throughout the applications. If customers wish to use only "Normal" Controls (i.e. ones linked to a single Risk) the interface, reports and analysis are all unaffected.
VIS-8757	Improvement	Local Matrix Configurations can now be defined allowing a different sized matrix to be used in each part of the Org Structure. The Risk Likelihood/Impact values of each Local Matrix can be "mapped" back to the parent Matrix so that data from different regions can be analysed together as required.
VIS-8758	Improvement	Org Units (and Entities) can now be optionally assigned to a Local Matrix Configuration allowing their Risks/Controls to be assessed on a Matrix which only applies to that part of the Org Structure.
VIS-8759	Improvement	Entity/Audit Risks/Controls are now assessed using the relevant Local Matrix Configuration if one has been specified.
VIS-8760	Improvement	The Entity-level Risk/Control Matrix now displays the Local Matrix Configuration (when applicable) and allows the user to toggle to show where those same records appear on the Group Matrix.
VIS-8890	Improvement	The Client-level Risk/Control Matrix now displays the Local Matrix Configuration (when applicable) and allows the user to toggle to show where those same records appear on the Group Matrix.
VIS-9080	Improvement	The Audit-level Risk/Control Matrix now displays the Local Matrix Configuration (when applicable) and allows the user to toggle to show where those same records appear on the Group Matrix.

Major Changes

Key	Type	Description
-----	------	-------------

VIS-2748	Improvement	Tabs can now be floated out of the main application window so they can be positioned on a second screen, for example. While floated these tabs remain bound to the Navigator and Ribbon so retain their full functionality.
VIS-3493	Improvement	When performing an Audit Check In/Sync there are now options to allow the user to quickly push the items most relevant to them, such as "Completed Items" (for Auditors) and "Reviewed Items" (for Audit Managers), etc.
VIS-7425	Improvement	A System Setting has been added to control whether the Audit/Processes need to be manually signed off (as Completed/Approved) or if this should happen automatically (when the Audit is Completed).
VIS-7444	Improvement	Actions can now be Reviewed on many more screens, including Action Tracker and Analysis (Actions Display Mode).
VIS-7543	Improvement	The Client directory (i.e. ClickOnce package size) has been significantly reduced so it can be downloaded more quickly.
VIS-7633	Improvement	The FBA administrator can now configure how frequently the users are required to change their password.
VIS-7634	Improvement	FBA can now be configured to prevent users from recycling the same passwords within a specified time period.
VIS-8133	Improvement	The Robot Job which synchronizes Staff (and Contacts) with LDAP can now be configured to automatically add new Staff (and Contacts) with their Identity.
VIS-8335	Improvement	When in Report Mode, the Data Grid Column Picker now allows the user to choose fields from the Linked Risks (or Objectives) when on a Control. One-to-many relationships such as this are shown at the top of the field list (because they relate to a "Parent") object. Similarly, when on a Risk the user may choose fields from the Linked Controls and these are shown at the bottom of the list as usual.
VIS-8343	Improvement	When Audit Assignments are added as a result of making Bookings in Retain Wallchart they are (subject to a new System Setting) immediately made Active.
VIS-8344	Improvement	When Bookings are modified in Retain Wallchart the Audit Planned Start Date is (subject to a new System Setting) set to the start of the earliest of all Bookings (including "Ghost" Bookings) for that Audit.
VIS-8345	Improvement	When Bookings are modified in Retain Wallchart the Audit Assignment Budget Time is (subject to a new System Setting) set to the total value of all Bookings (including "Ghost" Bookings) for that Person. This is similar to the calculation of the Audit Assignment Planned Time, except that excludes "Ghost" Bookings.

VIS-8353	Improvement	When Audit Assignments have their Budget Time set to zero as a result of deleting the last remaining Booking in Retain Wallchart they are (subject to a new System Setting) immediately made Inactive.
VIS-8354	Improvement	The Server Robot has been improved so it reliably runs all Queue-handling Jobs even if their Cron values mean they are scheduled to run at the same moment.
VIS-8563	Improvement	Linked Controls can be enabled/disabled via a new System Setting.
VIS-8893	Improvement	The Risk Exposure (and Control Coverage) screen now has a toggle to control whether the scores are calculated using the Group or Local Matrix (when applicable).
VIS-9130	Improvement	When performing an Audit Check Out there are now options to allow the user to quickly get the items most relevant to them, such as "My Open Items" (for Auditors) and "Completed Items" (for Audit Managers), etc.
VIS-9207	Improvement	The Audit Coverage (and Audit Scheduling) screen now has a toggle to control whether the Specific Risk scores are calculated using the Group or Local Matrix (when applicable).
VIS-9486	Improvement	The Entity Risk Register objects (i.e. Process, Objective, Risk, Control, Test) now have a Business Reviewer which behaves similarly to the Business Owner and can be used to specify which individual is responsible for Reviewing that record.

Minor Changes

Key	Type	Description
VIS-5277	Bug	The FBA login dialog allowed the user to press Enter while the password box was empty which resulted in an error.
VIS-5588	Improvement	When doing a Check Out of "part" of an Audit (e.g. including only the units of work containing "My Open Items") there is now an additional checkbox to allow the user to select if they wish to include all other units of work (i.e. ones which do not contain an item meeting the criteria) as read-only.
VIS-6039	Improvement	Data Grids with a perspective of Question Answer (e.g. Analysis) now allow include fields from the parent Audit Questionnaire and Audit on the Column Picker.
VIS-6192	Bug	The Staff/Contact Property Grid did not refresh immediately after a successful synchronize with LDAP.
VIS-6429	Improvement	When a user jumps to a record (i.e. via a Cross Reference or hyperlink) their favorite View is still loaded but the Filter associated to that View is no longer applied to ensure that the record will certainly be visible (subject to the user's Read Permissions).

VIS-6550	Improvement	The user is now asked to confirm if they choose to reset a Dashboard.
VIS-6678	Bug	An error occurred if the user attempted to close the application while the splash screen was still displayed.
VIS-6697	Improvement	The Server Robot can now be configured to send a notification email to the System Administrator in the event that a Job results in an unexpected error.
VIS-7001	Improvement	A "Copy Previous" option has been added to quickly add Time Sheet Lines to to match a previous Time Sheet Period.
VIS-7227	Improvement	The Navigation Pane Headers (e.g. "Audit Work") can now be translated by a power user via the Terminology screen.
VIS-7236	Bug	When an existing record (e.g. Action) is "attached" to a different parent (e.g. Finding) the original parent row was not immediately updated so it would appear as though there were two child records until the screen was next refreshed.
VIS-7423	Bug	The warning message which was displayed when attempting to Approve and Open Test with no Result (for example) has been improved.
VIS-7545	Improvement	The Audit Assignment Budget Time is now kept in better sync with the "ghost" bookings in Retain Wallchart. The first "ghost" booking is only made once the Budget Time is set to a non-zero value and if it is subsequently changed the "ghost" booking is adjusted to the required length (even if it has subsequently been moved to a different Start Date).
VIS-7810	Improvement	Screens which show locally cached information (e.g. Segmentations, Roles, Permissions, etc) now show changes made by another user when they are refreshed (rather than requiring the user to close and re-open them to force a round-trip to the server).
VIS-7966	Bug	It was possible for a "plain" text field (associated to a rich text value) containing invalid characters which would result in an error whenever that record was viewed (or the "plain" text field was added to a Data Grid).
VIS-7979	Bug	During the Complete Audit workflow, if the user cancelled the "Update Entity" dialog (or an error occurred) the Audit was still being changed to "Completed".
VIS-8300	Bug	The offline working sandbox could be left in an invalid state after attempting to Check Out and Audit with a selection which included a Locked Questionnaire.
VIS-8326	Bug	Passwords could not be copy/pasted into the FBA login dialog from the Context Menu.

VIS-8389	Bug	Many of the "Execute" Permissions were not applied correctly when working with an Audit (or Entity) specific Role. This could result in a user being able to Undo Sign Offs (e.g. Undo Complete) for an item for which they were not the Owner despite them having Role (for that Assignment) which had a corresponding Permission Setting value of "Own".
VIS-8391	Bug	The "Review" Permissions were not applied correctly when working with an Audit (or Entity) specific Role. This could result in a user being able to Add Review to an item for which they also Set as Completed despite them having Role (for that Assignment) which had a corresponding Permission Setting value of "Others".
VIS-8392	Bug	Many of the "Execute" Permissions were not applied correctly when working with an Audit (or Entity) specific Role. This could result in a user being able to Delete child items (e.g. Attachments) for an item for which they were not the Owner despite them having Role (for that Assignment) which had a corresponding Permission Setting value of "Own".
VIS-8395	Bug	The Execute Action Updates Permissions did not work correctly. When set to the value of "Own" they incorrectly allowed the user to set an Action Update to Submitted (or back to Pending) even if they were not the Respondent.
VIS-8397	Bug	The "Assess Planning Risk Assessments" Permission was not applied correctly when working with a Client specific Role. This could result in a user being able to Set In/Out of Scope an Assessment for which they were not the Owner despite them having Role (for that Assignment) which had a Permission Setting value of "Own".
VIS-8405	Bug	Various recently added fields had a default Alias which was not correctly set to inherent the Alias of another object (e.g. Action.LastReview, etc.).
VIS-8411	Bug	Rich Text could appear read-only (with no way of ever editing it) if it contained a frame as a result of being copy/pasted from an external source.
VIS-8423	Bug	An error occurred when updating a Time Sheet if it contained Time Sheet Lines which had been deleted by another user.
VIS-8425	Bug	Approved Audits did not always appear read-only as expected on Time Sheets.
VIS-8426	Bug	An error could occur when saving a Time Sheet which, under some circumstances, led to it containing invalid data which prevented it from being subsequently viewed without a further error.
VIS-8434	Bug	Drag/dropping file(s) onto the white space region of the Audit Reports screen (for example) when multiple grid rows were already selected resulted in multiple copies of the file(s) being uploaded.

VIS-8436	Improvement	When the user jumps to an Action (via Cross Reference, hyperlink, etc.) they are now taken to the Action Updates screen for "Tracked" Actions and to the "Actions" screen for "Not Tracked" Actions.
VIS-8439	Bug	The ASP.NET version is no longer exposed in the message header.
VIS-8463	Improvement	The Context Info window has been improved to handle Linked Controls, Audit/Processes and Audit Reports.
VIS-8464	Improvement	The "Parent" Section of the Property Grid has been replaced by showing the "Context Info" tool-tip.
VIS-8528	Bug	Completed (and Approved) Audit Reports and Problems were not being handled correctly if the user tried to delete the parent Audit.
VIS-8529	Bug	An error occurred when closing a Hierarchy Matrix screen (e.g. Audit Coverage), for example by clicking a different spine item, while it was still loading data.
VIS-8534	Bug	Charts (in Analysis and on Dashboard Tiles) could error if the user's Permissions were such that they are not authorized to Read any records with that Chart's Perspective.
VIS-8544	Bug	The option to Export to Excel was not enabled correctly when the Data Grid had focus on the "Time Sheets" screen.
VIS-8545	Improvement	When the user clicks "Save" on the Property Grid while the full-screen Rich Text Editor is open it now remains open allowing them to make further changes (or close it) as required.
VIS-8588	Bug	An error could occur when upgrading a UI View if it referred to a Child Data Grid which has since been removed or renamed.
VIS-8601	Bug	An error could occur when refreshing the Data Grid after Approving a Review Point, for example.
VIS-8609	Bug	An error could occur when saving a record (via the Property Grid) if it included a read-only Rich Text field being displayed from another (linked) record.
VIS-8637	Bug	Text Filters using the "NOT" checkbox did not always apply correctly on screens where no other criteria were also applied.
VIS-8638	Bug	Deleting all text from a Rich Text field left residual mark-up in the database field resulting in the field behaving as if it contained a value when it did not (i.e. if it was a Mandatory field it would allow the save even with no text entered).
VIS-8646	Bug	The icons used to represent "movement" of Risk/Control Assessments have been improved to make them consistent with other similar "state" icons.
VIS-8663	Bug	An error could occur when adding a new Matrix Configuration (or adding new Result Sets/Results) if the database contained a recently run Language Pack.

VIS-8664	Bug	The Doc Pop Date Add method was not working correctly and always returned the input value without performing the "add".
VIS-8691	Bug	Dashboard Charts did not show the correct data (i.e. did not match the Analysis screen) if they used an aggregation (e.g. Sum) rather than a simple record Count.
VIS-8740	Bug	The fixed column header on the "My Recent Clients" and "My Recent Entities" was "Audit".
VIS-8742	Bug	The Enable Logging Standard Customization performed extremely slowly when configured to run on a table which already contains a large number of records.
VIS-8748	Bug	It was possible to find that an Entity (or individual Entity/Process) could not be made inactive if, at some point, it had contained a Closed Entity Objective which had since been deleted. This scenario resulted in the EntityProcess.ChildCount becoming a negative number which prevented it from being deactivated.
VIS-8753	Bug	The "Define Entity ORCTs" Permission was not being applied correctly when set to "Deny". This could result in users being able to edit a Definition field of an Entity Risk/Control when they should be read-only according to their Roles.
VIS-8765	Bug	If a user launches an Audit (or Client/Entity) for which they have been given an explicit Role which exceeds their current "Maximum" Role, the Role they get for that Audit (or Client/Entity) is now the "Maximum" Role.
VIS-8766	Improvement	The process of changing which is the "Default" Matrix Configuration and (in a Multi-Client implementation) which Matrix Configuration applies to each Client has been improved in terms of performance. This makes the "Set Default Matrix Configuration" standard Customization obsolete.
VIS-8816	Bug	Analysis Views which included a filter on a related object (e.g. showing only Controls where Risk Category = X) did not load correctly.
VIS-8817	Bug	Chart Tiles which included a filter on a related object (e.g. showing only Controls where Risk Category = X) did not load correctly.
VIS-8880	Improvement	The "Time Sheets" and "My Time Sheets" screens now include a toggle to show/hide Closed Time Sheet Periods to allow read-only access to historic information.
VIS-8892	Improvement	The Group Score/Value of each Risk/Control is available to add to any Data Grid via the Column Picker (if Local Matrices are enabled).
VIS-8894	Improvement	The "Get from to Library/Entity/Audit" workflows for Risks/Control now allows for Local Matrices, i.e. only allows\copies the Assessments if the source and target locations use the same Matrix Configuration.

VIS-8907	Bug	The "Launch in New Tab" option did not work correctly for all Library Navigation Spine items.
VIS-8929	Improvement	When charting Time Sheet Lines in the Analysis screen the user can now filter the data based on attributes of the parent Audit.
VIS-8944	Bug	When the business rule generates the next available Ref any item (e.g. Incident, Action, etc.) it now considers all siblings and not just those which the current user can see according to their Read Permission. Previously it was possible for the newly created Ref to conflict with one which already existed but was outside of the user's view.
VIS-8949	Bug	An error could occur when using the Context Info to jump to another record with a save pending.
VIS-8953	Bug	Not all the information relating to any inner exceptions was being included in the error log when writing the contents of a TngException which hindered debugging.
VIS-8957	Bug	An error could occur when performing a file operation (e.g uploading an Attachment) which was not handled correctly and resulting in the application crashing.
VIS-8958	Bug	It was possible for Attachments to (silently) fail to upload during a Check In/Synchronize (if using doing so using an unreliable network connection) and therefore not be available online as expected.
VIS-8959	Bug	It was not possible to use ObjectGUID as the LDAP attribute to map to Person.UniqueID due to its data type.
VIS-8966	Bug	The Service Inspector code, responsible for checking for expired cookies, threw an error (forcing the user to repeatedly log back in) if the message contained certain (valid) Xml characters.
VIS-8971	Bug	Launching to Analysis by double-clicking a Dashboard Chart Tile failed to pass any filters associated resulting in a potentially different Chart being displayed.
VIS-9002	Bug	An error could occur when opening a Dashboard screen on a machine using any regional settings which use comma as the decimal separator.
VIS-9003	Bug	Add Finding from Library option was missing for Audit Questionnaires and Audit Questionnaire Sections.
VIS-9007	Bug	An error could occur if the user double-clicked the filter region on the Audit Trail dialog.
VIS-9008	Improvement	The Risk/Control "Display" Ribbon Group items have been re-arranged to be more logical and make better use of the screen real-estate.
VIS-9023	Bug	The "Assignment" dialog (used when choosing a Person to assign to an Audit, for example) did not allow the user to filter the grid.

VIS-9027	Bug	An error could occur when performing a file operation during a Check In/Out which was not handled correctly and resulting in the application crashing.
VIS-9048	Bug	When a Person no longer matches the LDAP "AutoFilter" criteria the Person (and relevant Identity) record could remain Active.
VIS-9052	Bug	Double-clicking a Dashboard Chart to jump to the Analysis screen could cause the Chart Type to change (e.g. from Pie to Bar).
VIS-9071	Bug	If an Attachment's Check Out record gets in a state where the Created By value is NULL it no longer throws an error if a user tries to launch it and it can be resolved via an Admin Discard.
VIS-9073	Bug	An error occurred when adding an Objective (in an Audit) to an Audit/Process for which the user could not Read the relevant Entity/Process due to their Read Entities Permission value.
VIS-9081	Bug	An error occurred if the user selected the "Set as Default Configuration" option in the Matrix Configuration screen with no row selected.
VIS-9082	Improvement	The "Update to Library/Entity" workflows for Risks/Control now allows for Local Matrices, i.e. only allows\copies the Assessments if the source and target locations use the same Matrix Configuration.
VIS-9089	Bug	Charts did not handle the "Unspecified" Category/Series correctly when aggregating.
VIS-9108	Bug	A couple of Client-level Permissions were incorrectly named ("Audit Scheduling" changed to "Launch Audit Scheduling" and one of the "Launch Attachments" changed to "Launch Planning Period Attachments").
VIS-9124	Bug	An error occurred when changing the Matrix Configuration for a Client if it contained a Closed Entity Risk/Control with an Assessment, or if a Closed Risk/Control Template had an Assessment.
VIS-9133	Improvement	When in Report Mode, the Data Grid Column Picker now allows the user to choose fields from the Linked Risks (and Objectives) when on a Test, i.e. ones to which it is related via its Control.
VIS-9141	Improvement	When in Report Mode, the Data Grid Column Picker now allows the user to choose fields from the Linked Risks (and Objectives) when on a Finding, i.e. ones to which it is related via its Control.
VIS-9151	Bug	Time Sheet Line attributes (i.e. Comments and Custom Fields) were not becoming read-only when the parent Time Sheet was Completed/Approved when being viewed in the Analysis screen.
VIS-9181	Bug	An error occurred when using the App Manager to run a Robot Job "immediately" if that job had additional assembly references.

VIS-9202	Improvement	When editing a Rich Text field (e.g. Test.Description) there is now a "Link to Attachment" option to allow the user to quickly insert a hyperlink to an Attachment which has already been added to the same record (e.g. Test).
VIS-9205	Improvement	Risks/Controls can be charted by their Group Rating (if Local Matrices are enabled).
VIS-9209	Improvement	Local Matrices can be enabled/disabled via a new System Setting.
VIS-9230	Bug	An error occurred when making Risk/Control Assessments in bulk if a Default Likelihood and Impact had been configured.
VIS-9298	Bug	The Data Grid Format Tab did not get enabled correcting when toggling Report Mode on/off.
VIS-9309	Bug	An error occurred when synchronizing an active user with a non-AD LDAP.
VIS-9335	Improvement	The Entity Risk Management Dashboard screen now has two additional widgets called "My Entity Risk/Controls Requiring Review" which list the items which are "Not Reviewed" for which the current user is the "Business Reviewer".
VIS-9385	Bug	Clicking the "clear" filter button did not remove the text filter string (if one was applied).
VIS-9414	Improvement	During an Audit Check Out (or Check In, Sync or Undo) if the selected Objectives include Linked Controls which they share with an non-selected Objective those other Objectives are automatically "included" to ensure that the local database always contains all the necessary data (at least as read-only).
VIS-9433	Bug	Changes to Entity Assignment Processes were not being recorded in the Audit Trail (if enabled).
VIS-9440	Improvement	When working within an Audit the Navigator now only shows Org Units and Entities which are within the Audit Scope.
VIS-9466	Bug	The Multi-Client Heat Map could display incorrectly if the database only contains one Client.
VIS-9487	Improvement	The "Review Entity ORCTs" Permission now has allowed values of "All", "Own" and "None" where "Own" means the user can add, edit or delete Reviews if they are the specified Business Reviewer for that record.
VIS-9492	Bug	The "Add Action Update" button on the Action Updates screen did not always enable correctly.
VIS-9498	Bug	The non-English values for the MovementState, LoginType, TimeSheetLineType, UITileType and PlannedDatePeriod segmentations could be empty as a result of the upgrade to 5.3. If this has already occurred they must be manually fixed (or they will be automatically fixed by the upgrade to 5.4).

VIS-9516	Bug	Read-only plain text fields containing line breaks did not display correctly in the Web UI.
VIS-9518	Bug	Objectives could become invisible when working offline as a result of performing a Synchronize of an Audit for which they were manually excluded.
VIS-9533	Bug	The EntityProcess.Active field was missing from the Data Grid Column Picker.
VIS-9580	Improvement	The application now gathers basic anonymous usage data to help Ideagen determine future development priorities. The collection of this data can be turned off via System Settings if required.
VIS-9624	Bug	The Rich Text editor did not apply the default font/size System Settings when used directly within the Property Grid.