



# Pentana Audit Release Notes

Version 5.4.0.10

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# Contents

Contents .....	1
Confidentiality .....	1
Headline Changes.....	2
Security Changes .....	4
Major Changes .....	5
Minor Changes.....	8

# Confidentiality

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# Headline Changes

Key	Type	Description	Version
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.	5.4
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.	5.4
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.	5.4
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.	5.4
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.	5.4
VIS-8759	Improvement	Entity/Audit Risks/Controls are now assessed using the relevant Local Matrix Configuration if one has been specified.	5.4
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.	5.4
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.	5.4
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).	5.4
VIS_WEB-926	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.	5.4

VIS_WEB-965	Improvement	Entity Risks/Controls are now assessed using the relevant Local Matrix Configuration if one has been specified.	5.4
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# Security Changes

Key	Type	Description	Version
VIS-10913	Bug	Fix an issue where It was possible for the WPF UI to ignore the setting for expired passwords when using FBA. Provided improved feedback in the login box for locked accounts and expired passwords.	5.4.0.9
VIS-10461	Bug	Password reset tokens now expire properly after a configurable amount of time has elapsed	5.4.0.8
VIS_WEB-1377	Bug	The Remember Me checkbox has been removed from the Log In page of the Web UI. It is more secure to use a password manager or your browser's password management features than it is to rely on a feature like this which relies on cookies that might be vulnerable to attacks from third-parties.	5.4.0.5
VIS_WEB-1255	Bug	Added explicit X-Frame_Options to custom headers in web.config to prevent click-jacking in WebUI and FBA sites	5.4.0.5

# Major Changes

Key	Type	Description	Version
VIS-10839	Bug	Risks would lose child Controls under certain conditions when being resynced after Offline Working.	5.4.0.8
VIS-10277	Bug	Resolved a number of specific exceptions triggered by an installation of dotnet 4.8+	5.4.0.5
VIS-10047	Bug	Answering a Question did not correctly refresh the Progress Bar, Menus or visibility of later Questions based on logic.	5.4.0.4
VIS-9961	Bug	It was possible for a template using RTFToPlain functions to cause the whole service to be locked. It could only be resolved by a full restart of the service or in some cases, the whole server. **Any templates that currently use RTFToPlain functions should use the _Plain buddy fields instead for performance reason aside from this fix **	5.4.0.3
VIS_APP-346	Bug	Fixed issue that caused import of two-way templates to fail	5.4
VIS-7543	Improvement	The Client directory (i.e. ClickOnce package size) has been significantly reduced so it can be downloaded more quickly.	5.4
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.	5.4
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.	5.4
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).	5.4
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.	5.4
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.	5.4
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.	5.4

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.	5.4
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.	5.4
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.	5.4
VIS-8563	Improvement	Linked Controls can be enabled/disabled via a new System Setting.	5.4
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.	5.4
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).	5.4
VIS-7633	Improvement	The FBA administrator can now configure how frequently the users are required to change their password.	5.4
VIS-7634	Improvement	FBA can now be configured to prevent users from recycling the same passwords within a specified time period.	5.4
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).	5.4
VIS-7444	Improvement	Actions can now be Reviewed on many more screens, including Action Tracker and Analysis (Actions Display Mode).	5.4
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.	5.4
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.	5.4
VIS_WEB-892	Improvement	When navigating "back" to the previous screen any recently applied Filters, Navigators, Columns and Sorts are re-applied (rather than displaying that screen as it was when it originally loaded).	5.4

VIS\_WEB-680 Improvement The FBA administrator can now configure how long a password reset link remains valid (the default is 24 hours). 5.4

# Minor Changes

Key	Type	Description	Version
VIS-11144	Bug	Stability of ClickOnce installer improved	5.4.0.10
VIS-11275	Bug	Password expiry rules now use UTC as a baseline comparison	5.4.0.10
VIS-11354	Bug	Improved reliability when dragging and dropping an attachment from an email.	5.4.0.10
VIS-11363	Bug	"Execute Document Request" now behaves correctly when "Read Steps" Permission is not set high enough.	5.4.0.10
VIS-11387	Bug	Tab names are now restricted to 32 characters in Excel exports - this is the maximum length Excel can handle and was causing an issue in non-English languages with lengthy tab names,	5.4.0.10
VIS-11127	Bug	Changing the reference of attachments no longer causes the application to lock up.	5.4.0.10
VIS_WEB-1668	Bug	Accounts with expired passwords are now directed to the reset password page in the Web UI by default	5.4.0.10
VIS_WEB-1684	Bug	Hidden filters no longer affect query results giving unexpected results	5.4.0.10
VIS_WEB-1718	Bug	Notes on Actions now correctly save in the Web UI	5.4.0.10
VIS_WEB-1713	Bug	Using an asterisk as a wildcard character in filter searches no longer forces an error	5.4.0.10
VIS_WEB-1707	Bug	Daylight savings time handled properly when saving Action Updates	5.4.0.10
VIS-11121	Bug	Audits containing samples can now be completed properly in all cases	5.4.0.9
VIS_APP-383	Bug	Fixed: If you have a custom segmentation called Source and link it to Incident, KeyIssue, Audit or Problem, it can cause the upgrade to 5.4 to fail.	5.4.0.9
VIS-10658	Bug	Analysis screens handle large volumes of data more gracefully	5.4.0.8
VIS-10704	Bug	Retired entities no longer cause issues when setting the scope of an Audit.	5.4.0.8
VIS-10642	Bug	Data grid selection is now retained after saving a record in an adjacent property pane.	5.4.0.8
VIS-10690	Bug	The user interface now refreshes correctly after rejecting an Action Update.	5.4.0.8
VIS-10817	Bug	Items with Open Points against them would not be checked out correctly if the "Entire Audit" option was chosen for Offline Working.	5.4.0.8

VIS-8815	Bug	Export to Excel for Questionnaires now includes answers of all types (text, number, selection, etc.)	5.4.0.8
VIS-10545	Bug	Filtering on Person field (e.g. Audit Director) using a text search did not work correctly and never returned any records even if there were matches.	5.4.0.7
VIS-10641	Bug	An error occurred when opening a Time Sheet if it contained more than one value for the same line/day.	5.4.0.7
VIS-10643	Bug	The "default" Answers to the Detail Sections of a Questionnaire were not copied into the Audit when the Tailoring Section was set to Completed.	5.4.0.7
VIS-10526	Bug	An error could occur when auto-populating Objectives into an Audit whose Scope covered more than one Entity and where the Processes differ across those Entities.	5.4.0.6
VIS-10436	Bug	An error occurred when removing filters from the Data Tree on the Org Structure and (Library) Processes screens.	5.4.0.6
VIS-10457	Bug	An error could occur when quickly clicking between spine items for screens which include a Hierarchy Matrix.	5.4.0.6
VIS-10424	Bug	If Definition Sign Off was enabled for Actions, the Implementation Date field was not being set to "today" when the Action is Completed.	5.4.0.5
VIS-10332	Bug	The Permission Guidance text did not appear (in English) as hover text (or on the Permissions Report) if the user had different language selected.	5.4.0.5
VIS-10265	Bug	When a Tick Many field (e.g. Audit.Departments) was hidden from users via the Properties Panels screen the corresponding "buddy" field (e.g. Audit.DepartmentNames) was not being removed from the Data Grid Column Picker (in either UI).	5.4.0.5
VIS-10060	Bug	The concurrent licence limit (for Occasional Users) was not being enforced at all times.	5.4.0.5
VIS-10064	Bug	An error occurred when removing columns (via the Column Picker) on the Roles and Matrix Configurations screens.	5.4.0.5
VIS-10285	Bug	All Action Updates were being included even iff the user selected to include only the "Open" Action Updates when doing a Get of Findings (and Actions) from one Audit to another. This has been fixed so that it now only includes Pending and Submitted Action Updates in that case.	5.4.0.5
VIS-9990	Bug	Fixed an issue in the Retain update where deleted records did not show as such until the Retain UI had its cache cleared	5.4.0.4
VIS-9948	Bug	It was previously possible to get an error when adding an FBA Identity if your email address was malformed.	5.4.0.3
VIS-9954	Bug	The Questionnaire Integrity Checker did not include a check that the Answer Set chosen for each Question was one from the same Questionnaire. Invalid Answer Sets were possible (via an erroneous upload or copy/paste)	5.4.0.3

and the resulting Questionnaire (though invalid) could then be made Live which resulted in other issues.

VIS-9911	Bug	Prepared/Confirmed Actions did not have their Variance fields calculated correctly (they were being treated like Completed/Approved Actions rather than Open ones).	5.4.0.3
VIS-9926	Bug	An error occurred when using the "Add Finding from Library" dialog if the user expanded/selected individual child Actions of the chosen Finding.	5.4.0.3
VIS-9849	Bug	Text filters did not apply correctly if the string to search for contained either an "_" or a "%" character.	5.4.0.3
VIS-9955	Improvement	When a Questionnaire is Rolled Forward any invalid Questions (i.e ones which are linked to an Answer Set from a different Questionnaire due to an earlier bug) are now "fixed" by finding the corresponding Answer Set/Answer in the new Questionnaire and linking the Question to that.	5.4.0.3
VIS_WEB-1058	Improvement	A user's assigned Entity Risks and Entity Controls can now be assessed directly from the Entity Risk Management Dashboard page of the Web UI. The Dashboard page can be made to display a table of the user's risks and controls, and these tables now include a button to open the Assessment page directly.	5.4.0.3
VIS-9893	Bug	Modifying an Audit Assignment's Budget Time caused an incorrect change to the Ghost Booking in Retain if that Audit/Person combination already had other Confirmed Bookings. This in turn caused the synchronization process to get into an infinite loop.	5.4.0.2
VIS-9894	Bug	Making a Booking in Retain (or an Assignment in Pentana) with a length which cannot be converted between minutes and hours without rounding errors (e.g. 1 hour = 0.142 days) could cause the Server Robot to get stuck in an infinite loop.	5.4.0.2
VIS-9895	Improvement	Audit Assignments with a Budget Time which includes a fraction of a day (e.g. 1.5 days) now result in Retain Bookings with the appropriate Start and End Times. The Start Time comes from Retain's Default Diary (typically 9:30AM) and the End Time is based on the fraction of a day entered. Full days now also finish at 5:30PM as expected.	5.4.0.2
VIS-9896	Improvement	When a Booking is added to Retain via Pentana it now allows for weekend correctly, e.g. a 3-day Audit Assignment on an Audit starting on a Thursday will run until 5:30PM on Monday (rather than Saturday).	5.4.0.2
VIS-9685	Bug	Filters associated to parent objects were not being passed to the Analysis screen when the user double-clicked a Home screen Chart.	5.4.0.1
VIS-9702	Bug	Showing/hiding a Rich Text field (e.g. from Contacts) via the Property Panels designer did not apply the change to the equivalent "plain" text field on the Column Picker.	5.4.0.1
VIS-9731	Bug	An error occurred when deleting a Cross Reference to a target object which does not support Cross Referencing.	5.4.0.1

VIS-9732	Bug	The client IP address formed part of the SAML token meaning the user got an error if it changed dynamically (e.g. as a result of the network or routing changing).	5.4.0.1
VIS-9739	Bug	The Action Update Submitted By/Time fields were being incorrectly cleared when it was later Rejected/Accepted.	5.4.0.1
VIS_CF-49	Bug	An error occurred when creating a value-dependent (child) segmentation in the same package as the (parent) segmentation it depends on.	5.4.0.1
VIS_CF-50	Bug	It was possible to create a (child) value-dependent link (e.g. Audit.Countries) which "depends on" a one-to-many link (e.g. Audit.Continents) if both links were created in the same package. This has never been supported (and was correctly prevented if they were added in separate packages).	5.4.0.1
VIS-8544	Bug	The option to Export to Excel was not enabled correctly when the Data Grid had focus on the "Time Sheets" screen.	5.4
VIS-5277	Bug	The FBA login dialog allowed the user to press Enter while the password box was empty which resulted in an error.	5.4
VIS-6192	Bug	The Staff/Contact Property Grid did not refresh immediately after a successful synchronize with LDAP.	5.4
VIS-9385	Bug	Clicking the "clear" filter button did not remove the text filter string (if one was applied).	5.4
VIS-8907	Bug	The "Launch in New Tab" option did not work correctly for all Library Navigation Spine items.	5.4
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".	5.4
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".	5.4
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".	5.4
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	5.4

		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 inherit the Alias of another object (e.g. Action.LastReview, etc.).	5.4
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.	5.4
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.	5.4
VIS-8423	Bug	An error occurred when updating a Time Sheet if it contained Time Sheet Lines which had been deleted by another user.	5.4
VIS-8425	Bug	Approved Audits did not always appear read-only as expected on Time Sheets.	5.4
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.	5.4
VIS-9433	Bug	Changes to Entity Assignment Processes were not being recorded in the Audit Trail (if enabled).	5.4
VIS-9466	Bug	The Multi-Client Heat Map could display incorrectly if the database only contains one Client.	5.4
VIS-9492	Bug	The "Add Action Update" button on the Action Updates screen did not always enable correctly.	5.4
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).	5.4
VIS-9516	Bug	Read-only plain text fields containing line breaks did not display correctly in the Web UI.	5.4
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.	5.4
VIS-9533	Bug	The EntityProcess.Active field was missing from the Data Grid Column Picker.	5.4
VIS-9624	Bug	The Rich Text editor did not apply the default font/size System Settings when used directly within the Property Grid.	5.4
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.	5.4

VIS-8439	Bug	The ASP.NET version is no longer exposed in the message header.	5.4
VIS-8528	Bug	Completed (and Approved) Audit Reports and Problems were not being handled correctly if the user tried to delete the parent Audit.	5.4
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.	5.4
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.	5.4
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.	5.4
VIS-8601	Bug	An error could occur when refreshing the Data Grid after Approving a Review Point, for example.	5.4
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.	5.4
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).	5.4
VIS-8637	Bug	Text Filters using the "NOT" checkbox did not always apply correctly on screens where no other criteria were also applied.	5.4
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.	5.4
VIS-8664	Bug	The Doc Pop Date Add method was not working correctly and always returned the input value without performing the "add".	5.4
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.	5.4
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.	5.4
VIS-8740	Bug	The fixed column header on the "My Recent Clients" and "My Recent Entities" was "Audit".	5.4
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.	5.4
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	5.4

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.	5.4
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.	5.4
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.	5.4
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.	5.4
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.	5.4
VIS-8949	Bug	An error could occur when using the Context Info to jump to another record with a save pending.	5.4
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.	5.4
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.	5.4
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.	5.4
VIS-8959	Bug	It was not possible to use ObjectGUID as the LDAP attribute to map to Person.UniqueID due to its data type.	5.4
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.	5.4
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.	5.4
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.	5.4

VIS-9003	Bug	Add Finding from Library option was missing for Audit Questionnaires and Audit Questionnaire Sections.	5.4
VIS-9007	Bug	An error could occur if the user double-clicked the filter region on the Audit Trail dialog.	5.4
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.	5.4
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.	5.4
VIS-9048	Bug	When a Person no longer matches the LDAP "AutoFilter" criteria the Person (and relevant Identity) record could remain Active.	5.4
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).	5.4
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.	5.4
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.	5.4
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.	5.4
VIS-9089	Bug	Charts did not handle the "Unspecified" Category/Series correctly when aggregating.	5.4
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").	5.4
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.	5.4
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.	5.4
VIS-9181	Bug	An error occurred when using the App Manager to run a Robot Job "immediately" if that job had additional assembly references.	5.4
VIS-9230	Bug	An error occurred when making Risk/Control Assessments in bulk if a Default Likelihood and Impact had been configured.	5.4

VIS-9298	Bug	The Data Grid Format Tab did not get enabled correcting when toggling Report Mode on/off.	5.4
VIS-9309	Bug	An error occurred when synchronizing an active user with a non-AD LDAP.	5.4
VIS-7423	Bug	The warning message which was displayed when attempting to Approve and Open Test with no Result (for example) has been improved.	5.4
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).	5.4
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".	5.4
VIS-6678	Bug	An error occurred if the user attempted to close the application while the splash screen was still displayed.	5.4
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.	5.4
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.	5.4
VIS-8326	Bug	Passwords could not be copy/pasted into the FBA login dialog from the Context Menu.	5.4
VIS_WEB-979	Bug	Value-dependent segmentations were not supported if the parent field (i.e. the one determining the allowed values) was on another (parent) object.	5.4
VIS_WEB-981	Bug	Date fields with no Time element (e.g. Action Current Due Date) could display incorrectly due to it incorrectly compensating for the server's time zone.	5.4
VIS_WEB-987	Bug	Boolean fields were not displaying correctly when added as columns to a Data Grid, the green tick was being displayed whether the value was true or false.	5.4
VIS_WEB-986	Bug	It is now possible to change the Language for Staff/Contacts other than yourself within the UI. The ability to change someone else's Language (e.g. to force emails to be sent to them in a different Language) is controlled by a new Admin level Permission called "Manage Languages" whose allowed values are "All", "Own" and "None".	5.4
VIS_WEB-871	Bug	Carriage returns were not always saved correctly when entered as part of a Text Answer for a Questionnaire.	5.4
VIS_WEB-916	Bug	The Parent Info panel displayed incorrectly if the user did not have permission to view one of the parent objects.	5.4

VIS_WEB-919	Bug	Plain text buddy fields (for a Rich Text field) were not displaying correctly if they contained carriage returns, etc.	5.4
VIS_WEB-949	Bug	The user's Login End Time was not being updated when they explicitly logged out of the Web UI.	5.4
VIS_WEB-950	Bug	An exception could be thrown when loading a previously saved UI View within one of the Analysis screens in a previous version of the application.	5.4
VIS_WEB-958	Bug	Attachments were not uploaded correctly if their file name contained an accented character resulting in them being corrupted and having zero size.	5.4
VIS_WEB-960	Bug	An error occurred when downloading a file (i.e. an Attachment) when the file name contained an unusual character (e.g. # or &).	5.4
VIS_WEB-1009	Bug	The Matrix screens have been improved to render correctly/wrap vertically on screens with low resolution.	5.4
VIS_WEB-1011	Bug	The Web Property Grid could not handle showing a (read-only) segmentation up a path (e.g. EntityObjective.Template\ObjectiveTemplate.AuditTypes).	5.4
VIS_WEB-1024	Bug	An error occurred if the database contained two Language Packs using the same culture.	5.4
VIS_WEB-1027	Bug	The Robot Jobs can now be tested/invoked immediately from the App Manager so they can be forced to run without having to wait for their next scheduled run.	5.4
VIS_WEB-1048	Bug	The Interested Party Names field was missing from the Action Data Grid Column Picker.	5.4
VIS_WEB-674	Bug	Large text fields (e.g. plain text versions of Rich Text fields) now appear word-wrapped when they appear on a Data Grid.	5.4
VIS_APP-326	Bug	Robot Job Parameter values were not being validated to ensure that they had the correct type.	5.4
VIS_APP-377	Bug	The file extension black/white lists were not applied when uploading files via the Robot Manager.	5.4
VIS_APP-351	Bug	The list of available (valid) Customizations was not refreshed after a successful upgrade.	5.4
VIS_APP-374	Bug	When a Customization (or other schema-modifying process) failed unexpectedly it was possible for the database to be corrupted but without writing the "FAILED" message to the Install Log. This could result in it still being used if the user failed to rollback immediately.	5.4
VIS_APP-370	Bug	An error could occur when upgrading a database if a custom Business Rules assembly was present/required.	5.4
VIS_CF-35	Bug	The DependOn and DependPath parameters for value-dependent segmentations were not being validated correctly with respect to multi-step and one-to-many paths.	5.4

VIS_CF-37	Bug	The Section drop-down was not being enabled when adding a custom field to either the Audit Report or Time Sheet object resulting in the business rules not being applied correctly when the package was later run.	5.4
VIS_CF-46	Bug	An error occurred when adding a value-dependency rule to a small set of standard links including Control.Category.	5.4
VIS_CF-47	Bug	Custom Rich Text fields were incorrectly being exposed on the Web UI Column Picker (only the Plain Text Buddy Fields should be available).	5.4
VIS_API-23	Bug	An error could occur when converting Rich Text to/from Plain Text via a multi-threaded console application, for example.	5.4
VIS_API-25	Bug	An error was not being thrown when a Business Rule violation occurred within a Procedure Call via the API (e.g. when mapping an Audit an Entity/Process).	5.4
VIS_API-26	Bug	It was not possible to get Audits added through the API to have the Audit Ref generation rule applied as it would if they were added through the UI.	5.4
VIS_EX-49	Bug	No error was being written to the Server Robot log file in the event of an error with a specific file during the ImportExcelFiles Job.	5.4
VIS_EX-50	Bug	An error occurred (and was not handled correctly) if the ImportExcelFiles Job encountered a file with cell reference errors (e.g. a formula referencing a cell which has since been deleted). Such a file is now moved to the "Errored" file and a log file is written containing the exception information.	5.4
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.	5.4
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.	5.4
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).	5.4
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".	5.4
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.	5.4

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).	5.4
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.	5.4
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.	5.4
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).	5.4
VIS-9440	Improvement	When working within an Audit the Navigator now only shows Org Units and Entities which are within the Audit Scope.	5.4
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.	5.4
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.	5.4
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.	5.4
VIS-8463	Improvement	The Context Info window has been improved to handle Linked Controls, Audit/Processes and Audit Reports.	5.4
VIS-8464	Improvement	The "Parent" Section of the Property Grid has been replaced by showing the "Context Info" tool-tip.	5.4
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.	5.4
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.	5.4
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.	5.4
VIS-9082	Improvement	The "Update to Library/Entity" workflows for Risks/Control now allows for Local Matrices, i.e. only allows\copies the	5.4

		Assessments if the source and target locations use the same Matrix Configuration.	
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.	5.4
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.	5.4
VIS-9205	Improvement	Risks/Controls can be charted by their Group Rating (if Local Matrices are enabled).	5.4
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).	5.4
VIS-9209	Improvement	Local Matrices can be enabled/disabled via a new System Setting.	5.4
VIS-7001	Improvement	A "Copy Previous" option has been added to quickly add Time Sheet Lines to to match a previous Time Sheet Period.	5.4
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).	5.4
VIS-6550	Improvement	The user is now asked to confirm if they choose to reset a Dashboard.	5.4
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).	5.4
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.	5.4
VIS-7227	Improvement	The Navigation Pane Headers (e.g. "Audit Work") can now be translated by a power user via the Terminology screen.	5.4
VIS_WEB-933	Improvement	The "Home" button on the FBA Password Reset screen can now be configured to take the user to the Web UI Home screen (if present) rather than back to the FBA Home screen.	5.4
VIS_WEB-975	Improvement	The "Current Action Update" widget (on the Action Detail screen) now shows/hides fields from Staff/Contacts the same as the Property Grid and Column Picker.	5.4

VIS_WEB-985	Improvement	There is a new System Setting to allow the administrator to control which additional characters are allowed to be typed into Web text fields.	5.4
VIS_WEB-864	Improvement	The Guidance associated to each field is now displayed on the Web Property Grid by clicking on the field name.	5.4
VIS_WEB-645	Improvement	An exception could be thrown when jumping to a Candidate Audit via a Cross Reference.	5.4
VIS_WEB-1005	Improvement	An UXE could be thrown when attempting to delete a parent item (e.g. Entity) when the user performing the task does not have permission to READ the child entities related to it (e.g. Incident).	5.4
VIS_WEB-702	Improvement	Text Filters can now be applied by pressing Enter (as well as clicking the Apply button).	5.4
VIS_WEB-708	Improvement	There is a new System Setting (with a default value of 20) to allow the administrator to choose the Page Size which applies to most Web Data Grids.	5.4
VIS_WEB-785	Improvement	An URL can now be constructed to jump the user to one of the "dashboard" screens such as "Action Tracking" or "Entity Risk Management".	5.4
VIS_APP-358	Improvement	Rich Text fields are no longer truncated when using Print Widget regardless of whether or not the user has Reporting Mode turned on/off.	5.4
VIS_APP-261	Improvement	The mappings used for synchronizing Identities to LDAP can now be configured via the App Manager.	5.4
VIS_APP-333	Improvement	If a database already contains a "failed" Customization the user can no longer run an Upgrade, Customization, etc. until the issues have been rectified (or the database rolled back).	5.4
VIS_APP-347	Improvement	The options to Upgrade, Customize and Import Language Packs are no longer enabled if the current user does not have "dbo" as their default SQL schema to prevent database tables being created under the wrong schema.	5.4
VIS_APP-361	Improvement	There are now two independent variables (HelpURL and WebHelpURL) so the two different Help locations can both be controlled via the App Manager.	5.4
VIS_CF-43	Improvement	The tool can now be used to modify (i.e. either add or remove) a value-dependency for an existing link (e.g. Risk.Category).	5.4