

ETS 4.0.0 Release Notes

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Release Type

Major Minor Bug fixes

What's New (release 4.0.0)

This release incorporates a major enhancement to integrate improved text editing features, as well as bug fixes and enhancements to the Migration Analysis features updated in Release 3.0.

1. Integrated Microsoft Word and improved rich text editing controls within ETS to enhance the user experience with exam document and workpaper editing while maintaining all other ETS functionality. These enhancement resulted in an intuitive and high performing rich text editing experience and a re-imagined business process around editing, collaborating, and reviewing text in ETS
 - a. Word-based (DOCX) Pages and Documents
 - b. Enhanced Text Tools Ribbon Bar and editing options
 - c. Improved Spell Check & Thesaurus with no resulting typing lag
 - d. Open and Edit Pages & Documents in MS Word
 - e. Create and View Document and Page Versions
 - f. Document & Page Collaboration Features to allow sharing with individual team members
 - g. Comparing & Merging Document and Page Versions using MS Word
 - h. Enhanced collaboration using the new Make Current Version function
2. Migration Analysis Enhancements.
 - a. To be consistent with the Loan MA grid unassociated functionality, added the unassociated column to the MA ORE grid. To display before importing any current assets
 - b. To be consistent for loans, allow sharing of unassociated ORE rows through the ORE MA grid
 - c. Allow historical assets (loans and OREs) to display before importing any current assets
 - d. Assets created through Create New Row on the MA grid appear on the MA grid without appearing on the scoping grid

What's New (release 3.2)

1. Historical SAER Policy Changes
 - a. Historical SAER display has been updated to reflect policy driven changes to the SAER template. The new Historical SAER display will display data in the format in which it was originally entered.
2. Historical SAER (Bug Fix)
 - a. This bug hinders ETS users from uploading SAER data while two simultaneous exams were open in ViSION (under the Continuous Examination program) and has been resolved. Users can now upload the prior year exam SAER despite two ongoing exams.
3. IER (Retirement) → RADD
 - a. To accommodate the retirement of the Interagency Examination Repository (IER) application, ETS has been updated to upload and retrieve Reports of Examinations (ROE's)

from the current system of record, the Regional Automated Document Distribution and Imaging System (RADD) application.

What's New (release 3.1)

This build works with .NET Framework version 4.8. It also contains improved error logging.

What's New (release 3.0)

This build contains the following enhancements and bug fixes that related to Migration Analysis (MA):

1. Linesheet with additional features/functionality and business rules:
 - a. Loan:
 - i. Add New Data Entry Rules in Loan Migration section
 - ii. Add validation for creating new custom row(s) to Loan Migration section of the Linesheet
 - iii. Add Loan Migration section to Discuss Only and Group Linesheets
 - iv. Add different Edit Modes in the Linesheet – Loan, Borrower, and Group
 - v. Add Comment and Attachments Pane to Discuss Only and Group Linesheets
 - b. ORE:
 - i. Add New Data Entry Rules in ORE Migration section
 - ii. Add validation for creating new custom row(s) to ORE Migration section of the Linesheet
 - iii. Add different Edit Modes in the Linesheet – Property and Group
2. New columns with new business rules are added or enhanced in the Migration Analysis grids (Loan and ORE) for each view – Summary, Substandard, Doubtful, and Loss
 - a. Row Information
 - i. Loan:
 1. Include checkbox – the ability to check or uncheck to include or exclude calculation the row selected
 2. Scoping Status – displays the following Scoping Status: In Scope (I), Discuss Only (D), Group (G), or Blank
 3. Loan Type – displays a loan type
 4. Edit Mode – displays the following Edit Mode: Loan (L), Borrower (B), Group (G), or Blank
 5. Unassociated – “U” is displayed when a row is unassociated or “blank” is displayed when a row is associated to a current exam
 - ii. ORE:
 1. Include checkbox – the ability to check or uncheck to include or exclude calculation the row selected
 2. Scoping Status – displays the following Scoping Status: In Scope (I), Group (G), or Blank
 - b. General Information
 - i. Loan:
 1. Assigned CIF/Group Name – displays historical group name, current group name, or historical/current Assigned CIF
 - ii. ORE:
 1. Property Name – displays property name or current group name
3. New features are added or enhanced to the MA Grids (Loan and ORE) for all views – Summary, Substandard, Doubtful and Loss
 - a. Column Picker – Hide or show column

- b. Filter via Dropdown – Filter by checking or unchecking from the column dropdown
 - c. Filter via Typing – Filter by typing in the filter field
 - d. Sorting – Ascending and descending order
 - e. Column rearrangement – Drag and drop to rearrange the MA grid column order
 - f. Refresh function – MA Data Refreshed dialog displays the first time the user opens each Current Migration View of the Loan and ORE MA grids. If a Loan or ORE MA grid is closed, the dialog will display for each view again.
- 4. Enhance the Create New Row dialog to remove the Balance Outstanding field
 - 5. Share and Share All Unassociated Rows from the Loan MA grid in all views – Summary, Substandard, Doubtful, and Loss
 - a. Add Hotkey for Share and Share All Unassociated Rows
 - b. User will be allowed to share or share all unassociated row(s) with one or more users at the same time
 - c. User will be allowed to accept or reject unassociated row(s) received from another user
 - 6. Include/Exclude function is added to the ROE pages
 - a. When a row is checked or unchecked from Include checkbox in Loan MA grid, value is included or excluded from the calculation
 - b. When a row is checked or unchecked from Include checkbox in ORE MA grid, value is included or excluded from the calculation
 - 7. Bug Fixes related to:
 - a. XAML displays in Print Linesheet
 - b. A specific foreign key issue when accepting the package
 - c. Template edits freeze up ETS

Remaining Known Issues

ID	Title
490427	Text cutoff in Other Loan Findings crystal report
488066	SUH placing loans in WL playlist after running Partial Charge-Off, Not on WL query
232819	ROE - Updates to just the loan amount does not save on the TE page because the total is not automatically updating
446319	Save All does not save changes in a section in templates
454920	Page Numbering Error when Exporting without Note on a Page Level
441658	SC/GC: the error flagged by SC/GC is out of sync in large document
413867	508 Compliance - Thesaurus
413808	508 Compliance - Formatting
413871	508 Compliance - Find&Replace dialog window
437428	SC/GC: Spelling and Grammar error present within same word/phrase
436958	Selecting (highlighting) in Recent Institutions not working
441874	Clicking anywhere on horizontal line next to checkboxes in Management Profiles selects/deselects checkbox
416392	Resolve an issue with using bold and other formatting types in Templates
412400	Ruler - Margins not aligned with editable sections within tables
371862	CP-Reconnect button does not establish connection
405808	Bullet List - Deleting selected partial list
287340	08.60 - Multiple Examiner Playlists displayed individually When Loading Archive as Current Exam
405779	Undo - Undoing a highlight or the font color does not reverse to original
405778	Change Case - Changing is the case of the list item does not behave as expected
263724	Update Purge Script to Implement Workaround
396532	Complete document Review and sharing asset data
413802	508 Compliance - Asset Review Reports
402982	Lists: Bullet/Number sub- list remains a sub-list after clicking bullet/number list icon
385726	Accepting ORE Securities -Phantom Assets
385650	Analysis: Playlist Sorting: sorting in Asset Grid does not refresh
385669	Paste with Source Formatting-List: Pasting Compliance and EA page that contains list numbering does not preserve the source formatting for the list
385663	Bullet List Formatting after Pasting: Pasting Bullet List from Word not Formatted correctly
385664	Bulleted List - Unable to merge two lists together
385660	Bullets-Sub-Bullets moving independently
385638	Analysis: Thesaurus: Launching the Thesaurus causes shell froze error message
385722	Inconsistent recognition of misspelled words when using Spellcheck "Add to Dictionary" function
385723	Typing lag when stopping spell check to modify the document
385652	Spell Check - Misspelled possessives are not recognized
379405	Grow/Shrink - Bulleted cell items does not grow/shrink at the same rate
260091	ETS SQL consuming hard drive disk space
368242	Connection submenu from the Connection icon - clicking anywhere on the line causes Collapse/Expand state to toggle
358156	508 Contrast setting of the Manage Columns dialog window
358790	Mouse is locked when dialog is dragged
342198	Whitespace spill over into the non-editable section of the page

ID	Title
342211	GC - improve on suggestion for two periods separated by a space (. .)
342213	Page Up/Down keys are malfunction inside the second opened editable section
342215	Leadsheet status not updated into complete when loans/linesheets are set to complete
232355	ETS does not display an error message when an external user enters incorrect credential after successful activation
393910	INC0347039 - Custom Template Printing Issues (SUH)
483903	Printing Issues in Win10 - Portrait vs Landscape
388560	Data removed from Applied to Borrowers linesheet templates
232822	UBPR image overlays the exams grid in the backstage area
314163	INC0221191 - CSV Export Creates Extra Columns
232826	SQL error during import process not properly handled
376926	SUH Adding Loan to Relationship After Running Custom Queries and Sorting by Assigned CIF
232835	Display numbering on TE page is skewed after 4th loan to the same borrower is selected
247873	Issue with report pages when bank switches filing Form 041 to Form 031
232839	ETS does not properly handle attachments in ALERT1.x archives retrieved as secondary exams
233248	Duplicate assets in data packages
232846	BreakPageBefore tag inside a table causes SUH
266636	Investigate error when retrieving assets from historical archive
301026	Investigate Error Loading Archive - SqlException (0x80131904): Violation of PRIMARY KEY constraint
301024	Investigate Error Loading Archive - System.NullReferenceException (HistoricalDataManager.cs:line 272)
232847	Corrupt CSV File created by FREDDY
232852	Management List totals are off by 1
260056	Loading of Call/UBPR Data on pages takes longer
237073	Selecting the same option for Agency and Other Agency cause error when saving
232854	Compare to ViSION shows incorrect error message for a new offline exam
235877	INC0043408 - Incorrect Duplicate exam indication when modifying exam data
315979	Add GL Adjustment button inaccessible after number of GL adjustments added
232856	Related assets sharing a linesheet are not marked as uncomplete on the leadsheet
233244	Reviewer does not see the changed page display name in ROE in Print Preview when user Previews the Document
232862	Inconsistent behavior when selecting all in group linesheets after sort
232864	View All Columns View (Alpha) doesn't allow scrolling
232866	Sorting error in comments section of linesheet
232867	Text truncation and spillover: .RTF version
333445	Templates containing scor in their name pulls in SCOR list
232870	Multiple Examiner Playlists of Same Name
344890	INC0273017 - ETS Freezes Importing Assets w/ Solo Decimal in Currency Field
233083	Errors occurred on Other Loan Findings Report
344526	Import File Converter does not convert when the source file had incorrect data format
253669	Left-click on Meetings or Committees rows in those grids does not highlight selection
232874	Find & Replace function does not work if formatting within a word is varied

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265565	Additional Loans Display on Team Members' Leadsheet after Another User Discards Portfolio and Re-Scopes Loans
260489	Text cutoff on DOE page in the Document Print Preview
280056	Reverted Aliases Don't Share
274125	Adjusted Value for removed CDR fields causes OOB to fail to load
302586	Commit to Portfolio/Rescan Data/Discard Data button does not work after hiding the Cleanup ribbon
232878	Portfolio Summary & Import Summary - count of the number of borrowers should be the number of unique combinations of Borrower IDs and Short Names, not just Borrower IDs
232888	Running script DBReset.bat file under ETS/Scripts folder got errors in PIE/CIE/QA/PROD
232895	Open Location on some Call Report elements goes to a different schedule
232815	ETS indicates that SAER Comment was uploaded successfully, however, VISION does not receive the comment for certain exams
307121	Call Reports refresh when gathered on different exam
232897	Editing an Institution Profile via the "Enter" key immediately navigates back to the Recent Institutions screen
232898	Work Paper and Exam Doc Panes render incorrectly when unpinned and then viewed on top of the UBPR
232899	Custom Formulas not refreshing when creating in new template
232903	Spelling Error on Collateral Templates - Livestock vs. Live Stock
347956	Apostrophe in new BSA violation code shows up as a question mark
240544	INC0058993 - Comments and Attachments Pane does not display when user minimize the ribbon bar.
232906	Incorrect error message when inputting template formula fix
232908	SUH if an exam is created without a discipline
281194	Certain Reserved XML Characters in Editable Fields Cause SUHs
232910	Unsaved Changes asterisk appears after adjusting via Drill Down
233053	Error 291 Removing Exam
233064	Found unknown BAML record Unknown
233065	Changing from delimited to fixed width for some import profiles during edit causes malformed columns
233068	Post Exam Survey Document - Pages not sorted by Default order
233069	ROE displays expanded after navigating to other tabs when ROE was collapsed
253667	Multiple exams/rows highlighted in My Exams tab without using Ctrl or Shift & click keys
233071	Importing a loan file with validation errors into a loan portfolio with existing loans results in the Ln - Scoping tab active instead of the Error tab
233333	Keyboard/mouse shortcuts in Management grids not working
242707	INC0063215 - TE Page - Descriptions not sorted in alpha order
233073	User cannot single-select the top message in a group after choosing a multi-message content change in version comparison
233074	Active tabs change when using Alt+Tab to navigate towards/away from ETS
233075	Completed gather artifacts notifications show multiple times in inbox
233077	ORE Printed/Saved Linesheet Text Wrapping
235038	Error when editing invalid tab-delimited import profile
233078	Template Designer: Font color should override style type
233079	Order of Workpapers

ID	Title
233081	Out of scope asset grid remove from playlist is enabled
233085	Add New Relationship name is limited to 50 characters
233087	Document Locked dialog will appear a second time when a user closes the first appearance of the dialog
233089	Printing Schedule RC-O from the Call Report
233091	Scoping Grid is displaying columns of data that it should not
233092	Adding a custom column to the All Columns Views does not insert the column in alpha order
252376	INC0066144 - LPR percentage calculations incorrect when balance is negative
233123	Editing profile of Analysis Only CP exam requires PEP Complete Date
233127	User must double-click rather than single-click in Value field of Query Builder
233129	Accrued Interest and Unfunded Commitment are in the wrong position in the All Columns (ILDR) view
233131	Export DCP Data dialog does not close when user hits Esc
233213	System fails in removing superscript/subscript operations across table boundaries
233223	Re-format text after copying and pasting into a document
233227	Sometimes spaces at the beginning of a paragraph can get removed upon saving
233228	Crystal Report - Reason for Classification: Superscript does not appear on Printed Linesheets
233230	Deleting one row of table removes all but leftmost borders
233232	ETS has different tab stops for the beginning and middle of a paragraph
233237	Table text added to existing table between versions is not highlighted in green during version comparison
233268	Text can spill past section boundaries
233288	Crystal Report - Delinquency by loan type report graph is unreadable due to size.
233293	Table borders are missing from the write-up section when the linesheet is in print preview
233312	Borders do not extend to the next page when comparing document/page versions, in print preview, and when printing
233316	Formatting changes on text reverting to previous formatting
233331	Addition of a superscript following a word will result in the word being identified as a spelling error
233334	ETS Header - changes to opaque sometimes
233336	The Change Case formatting function increases the indentation of the list item when used on list text.
233210	508 - Exam Management > Team Screen: Header and Information text is not read to user
233221	508: Some items are not accessible
233245	508 - Keyboard shortcut issues in the Text Tools ribbon bar - 3rd Party Issues Dev Components
233329	508 - ETS Backstage - Need way to get from menu to content area
233332	508: Some items not read by screen reader
342809	SUH when deleting and re-entering text
396696	Pop up message inconsistent - Adding or deleting a Page by when user when the another user is working on the document
443858	SC/GC: Adorner does not display under the misspelled word directly if Add Fields or Add Checkboxes are presented.
402689	OpenFISMA 6323: ETS v1.4.2 - Excessive Permissions on Local Application Files
404493	Central Peer Reconnect Box "Stuck" After Reconnecting
411982	Upgrade - receiving SUH opening a page after upgrade to 1.4.2

ID	Title
413804	508 Compliance - Print Preview pane
413805	508 Compliance - Print
413809	508 Compliance - Ruler
413892	508 Compliance - My Exam tab
501281	Inconsistent tabbing behavior in Loan Classification section of the Linesheet
501282	Historical Loan/ORE MA data do not display when current row is manually created
509293	Investigate Issues with ETS Help Files, Admin Site, and ClickOnce Sites when using Chrome Browser
509354	UBPR Download Fails on the first attempt
512835	Find & Replace - SUH when edit a word in the editable section after Find All is selected