

## Version 4 Release Notes

May 2013

Features listed below under Version 4 are those that have been introduced since Version 3.5.2.9, which was the final Version 3.x release. Features listed under Version 3.5.2.9 include features from earlier releases (Version 3.1.1.8 and Version 3.2.1.7). All feature sets are available in ProductionQC and ServicingQC systems.

### Version 4

#### Feedback

- Feedback Web Application
  - Session timeout may now be set by Administrator
  - Filter parameters and column header sorting of feedback items list is now retained while feedback is input and submitted.
- Gather Feedback
  - Option to default to Select All or not in Configuration
- Enabled opening of Closed items in the Manage Feedback detail view.
- Fixed refresh issue in Feedback Recipient Manager when sample type is changed while on the screen.

#### Auditing

- New Preset Comment Functionality
- Added Preset Comment drop down list control in the Audit Shell.
  - It now expands the length of the comment text box and sizes with the form.
  - A tooltip is also available after a comment is selected.
- Increased length of Audit Category Code.
  - There was previously a limit of 2 characters. It has been increased to allow 6. (Total audit question number length is now up to 14 characters, with the first 2 to 6 characters comprising the Audit Category Code.)
- New functionality to better handle edits to the Audit Category of an Audit Question Code.
  - Functionality will update existing Audit Question Catalog questions, Audit Page questions, and applicable Display Conditions.

#### System Management

- Return to loan opening screen - Upon exiting the review shell, user is returned to the screen from which the most recent loan was opened (i.e., View Completed Review, Review Loan File, etc).

- Screen state retained - The grid state for each screen is now better maintained and includes sorting and the collapsed/expanded state.
  - For instance, if loans on the Review Loan File screen are grouped by “Sample Group Cd”, every time the user returns to the screen the grid will be grouped by that field. In addition, within that grouping, if the “MANL” group items are expanded to show while all the “STAT” items are collapsed to not show, this view state will also be maintained.
- Report Manager:
  - Reports per category are assigned to users as User Options.
  - Ability to limit available Report Manager categories to users and/or user groups.
  - These options can be assigned via the ‘Options’ tab of the User Access screen.

### **Miscellaneous**

- Targeted Sampling
  - Check/Uncheck All for Sample Type per query
  - When adding query, default to Global Sample Type only
- Reduced database permission requirements for users (i.e., reduce need for “elevated privileges”)
- Changed encryption key for application.
  - Reflects security policy to update the key every 2 years.

## **Version 3.5.2.9**

### **Feedback**

- Feedback responses
  - New email notifications option from Windows App to Web App
    - Option to not send email notifications from Web to App (for security reasons)
  - All responses will log a notification and will show alert of new message on home pages
  - Notifications management in both Windows App and Web App
- Feedback Groups
  - Feedback Group Management area on Feedback Recipient Manager screen
- Web Utilities included on the System Utilities screen
  - Ability to clear users’ feedback web sessions
- Generate Feedback changes
  - Does not generate feedback immediately.
  - Displays gathered feedback for display and confirmation
    - Users can select all or specific items to generate
    - Users can modify feedback parameters prior to generating and distributing
- Redesigned the ‘Generate Feedback’ screen to decrease the load time for units.
- Added a configuration option to disable the “Comment Only” checkbox on the feedback website.
- Web Fields Manager menu item
  - Manage field display on feedback website

## **Auditing**

- Audit Lookup Table Manager
  - Added reassign values functionality
- Audit question categorization – audit questions can now be categorized for filtering and reporting purposes.
  - Standard categories are “Regulation”, “Area Tested” and “Federal/State”.
  - Custom categories available through Cogent.
- Enhanced Supervisor review functionality
  - New Supervisor option to open Completed loans without reverting to Pending status
    - This preserves original audit information, including time/date stamps and last auditor
- “Update Conditions” button in Audit Shell Designer to significantly improve Audit Shell Load Performance.
  - This button builds the condition during the Audit Shell design process and stores the information in the database. The next time a user logs in, the compiled display conditions are retrieved from the database and used in the audit shell. (Previously, these conditions were compiled when the shell was opened, which took up most of the loading time.)
- Added Alternate Address functionality for Reverification letters
- Notes/Comments field in Query and Condition Manager – display conditions can now be annotated

## **Reporting**

- Reports
  - New ‘Loans with Errors’ report
  - New ‘Findings Disparity’ Report
  - Additional data tables for Pareto reports
  - Adjustments to Feedback reports to include responses
- Report Data Export
  - More fields exposed to Report Writer
  - Ability to filter by Data Groups in Report Writer
- Report Writer Security
  - Added report and report field security – reporting field permissions now tied to User Access permissions
- New ‘Audit Finding Disparity’ report shows disparities between auditor and supervisor findings
- Adjust Loan Review Detail report to show fields in two columns instead of one.
- Show Code & Description in the Unit Parameters for reports
- Configuration to turn off feedback functionality in Loan Review Detail Report.

## **Sampling**

- Automated Targeted Sampling size calculation and defect rate tracking.
- Fixed issue with Status Date Control in Targeted Sampling not updating properly.

## **System Management**

- User Group Functionality.
  - Allows application users to be placed into specific groups and managed.
- New User Options
  - Do not allow user to log into system
  - Do not allow user to add/edit/delete feedback recipients
  - Do not allow user to view secure reports
  - Do not allow users to edit any report created by another user
  - Do not allow user to create or edit reports with secure fields
- Added Branch information to grids.
- Added Report and Export options for Lookup Table values
- Adjusted code in Feedback website to handle timeout issue better.
  - The Application Pool settings above are also needed in addition to the code.
- Updated data management screens in Administrator Tools (i.e. Lookup Table Manager, Audit Shell Lookup Table Manager, etc)
- In application title bar, enable display by user of the environment in which the system is currently deployed (e.g., development, UAT, production, etc.)
- Encryption Key Strength Increased from 1024-bit to 2048-bit