



CaseWare IDEA®

What's New | February 2022



Purpose

This latest release of IDEA significantly advances the functions and features available while still maintaining IDEA's world-renowned ease-of-use.

System Requirements and Installation Information

Please refer to the installation guide you received with the installation package from your CaseWare Partner.

New Features and Enhancements

This release includes the following new features:

Feature	ID	Description
CaseWare Working Papers	13284, 13061, 13285	IDEA lets you collaborate with an installed, supported version of CaseWare Working Papers. You can send IDEA databases (as a database file or PDF) and other project files directly from IDEA to a CaseWare Working Papers Client folder.
Delimited Extended Import	13803	IDEA can now import CSV files that use the RFC 4180 format. The Text import and Advanced Record Definition Editor were updated tosupport Delimited Extended imports.
Smart Actions	10916, 13282, 11622, 11624	Smart Actions are specialized IDEAScript macros that launch your default web browser or open a web tab in the Main window (depending on the Smart Actionscript). Use Smart Actions to dynamically look up information on a single Characterfield cell value or multiple Character field cell values within the same recordwithout manually copying and pasting the values into another application.
WebTabs	12306, 13388, 12397, 12398, 12611, 12840, 13386	The Main window (formerly the Database window) in IDEA displays databasetabs and web tabs. Database tabs appear when you open IDEA databases. Web tabs let users have a unified experience when accessing IDEA's web-based resources, such as IDEA Lab and CaseWare Passport. You can now access thosewebsites within a web tab in IDEA.

This release includes the following enhancements to existing features:

Feature	ID	Case	Description
Data Files	13100,		More recent dates appear in the Samples and Tutorial Managed projects
	13309		data files.
			Due to these changes, the IDEA Tutorial, Report Reader Tutorial, and
			Advanced Statistical Methods Case Study guides have been updated.
Delete Database	11406		You can now delete the active database without closing it first.
Documentation	13208	CAS-57066-	Installation Guide
		M0P0K2	The Installing IDEA section now includes a step detailing product registration or connecting to a CaseWare Network License Server (NLS).
	13549,		Installation Guide
	14582		The Hardware Requirements section now includes a note about running IDEA on an Apple macOS.
			In the Technical Notes section, the Project Overview bullet indicates that there can be Project Overview information loss if IDEA 12 Managedprojects are opened in IDEA 11.x and earlier.

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		13424		Updated the installer to remove the runsilent.vbs dependency.

eature	ID	Case	Description		
anguage Browser	8849	Cuse	A new API, Client.EquationEditor, has been added to the LanguageBrowser.		
			Client.EquationEditor allows you to validate criteria in the Equation Editor and returns the equation as a string to be used in different tasks.		
ibrary Window			Similar to the drag and drop functionality in the File Explorer window,you can now drag and drop files from the Library window onto other applications.		
ocal Library	5981	CAS-14460	You can now configure the Local Library folder location in the IDEAOptions dialog box.		
AS Office 2010	7608		IDEA 12 will not support MS Office 2010 as its EOL (end-of-life) was inOctober 2020.		
Aonetary Unit ampling (MUS)	11950		On the Summary report, if there are no understatements, this information is excluded from the report. Only the overstatementsinformation is displayed.		
Project Overview	14352,		When you open your IDEA 11.x and earlier Managed projects in IDEA12, the Project Overview data file is		
	14353		migrated from the SQL Server CEfile (ProjectOverview.sdf) to an SQLite file (ProjectOverview.db).		
Python Integration	10849		IDEA is packaged with the Python interpreter, Python packages, and associated files for Python 3.9.2.		
	11673		You can now add and edit Python scripts using the Equation Editor.		
	12580		On the IDEA Options dialog box, the Run Python scripts check boxhas been renamed to Enable Python integration.		
	14064		Performance enhancements were made to our Python integration thatenables IDEA to run faster. IDEA no longer instantiates a PythonInterpreter instance unless Python is enabled.		
	10544,		The IDEALib.py custom Python package includes the followingenhancements:		
	10850, 11672		Due to the upgrade to Python 3.9.2, IDEALib.py no longer usesPython.NET.		
	11072		New functions have been added to the package. See the CaseWare IDEA Help for more		
			information. The project_files function no longer lists hidden files and otherspecific files. See the IDEA Help for more information.		
Silent Install	8965, 9653	CAS-41389, New silent install optional parameters let you automatically register an authorization cod CAS-39381 installation or automatically connect to aspecified CaseWare Network License Server (NLS).			
SmartAnalyzer	10704		SmartAnalyzer (English) is now available in IDEA (Japanese).		
Summarization	14307		Optimized the Summarization task to increase performance.		
	14387		The Quick Summarization feature includes the following performanceenhancements:		
	1.007		The 32,000 output record limit was removed. You can now summarize up to		
			eight fields.		
			All Summarization statistics are now available.		
			The Include % in output database and Use fields from lastoccurrence options are supported.		
Jser Interface	The following enhancements have been made to improve the IDEA user experience.				
			Icon updates were implemented to give the product a more modernlook and feel and better represent the underlying action.		
	10692	CAS-65318, CAS-64967	When the machine that hosts IDEA is connected to multiple monitors, IDEA will now launch the main IDEA window and splash screen on the monitor it was last located. If the last known monitor is not available, it will launch IDEA on the main monitor. IDEA will*always launch in the maximized state.		
	11365	1	With the Data property enabled for the Main window, you can nowresize multiple fields simultaneously.		
	12030	1	The following commands have been renamed:		
			On the View tab, in the Display group, Freeze Columns is nowFreeze Fields.		
			On the View tab, the Group group is now Records.		
			On the View tab, in the Records group, Group Records is nowGroup.		
			On the View tab, in the Records group, Grouping Off is nowUngroup.		

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Feature	ID	Case	Description
	12285,		The Library and File Explorer windows contextual menu items were re-arranged for a better user experience.
	12286		
	12351, 13030, 13417		The following contextual menu enhancements were implemented on the Main window (formerly known as the Database window): Available right-click commands are now specific to the UI element(tab, field header, row header, and cell) in the Main window. For example, when you right-click a field header, you are presented with commands that are field-related (Field Manipulation, Add Field, etc.) The following commands have been renamed:Freeze Column(s) is now Freeze
			Field(s)Column Settings is now Field Settings Close All is now Close All Tabs
			Show Field Stats is now Show Inline Field Stats.
			On the Data tab, in the Fields group, the Field Manipulation dialogbox launcher has been replaced with a Field Manipulation command that appears on the tab.
			The entire field is selected when you right-elick a field header in the Main window.
	13807		You can now use the middle mouse button to close tabs in the Mainwindow.

Bug Fixes

Feature	ID	Case	Description
Documentation	9077	CAS-43924	IDEA Help
			Updated the Exporting Databases topic to include a note about Microsoft Excel date limitations.
	9389	CAS-40556	IDEA Help
			Updated the Date fields note in the @If topic to state that the TrueResult and FalseResult must be the same - either string ordate.
	13287		IDEA Help
			Updated the Cloud Import Utility link in the Importing CaseWare Accounting Package Files to point to theappropriate website.
	12677,	CAS-54817,	IDEA Tutorial
	12678	CAS-54824	Updated the instructions for the Gallery button and clickingthe Y-axis in the View the Results Graph section.
	13373	CAS-57481	CaseWare Network License Server Installation Guide
			Updated the Technical Notes section to include informationabout ports 80, 443, and UDP port 5093.
			The IDEA Installation Guide was also updated to include thisinformation in the CaseWare IDEA License Manager Accessibility section.
@Dtoc	13510	CAS-59632	Resolved a date mask issue.
File Explorer	13360	CAS-58125	Resolved issue encountered when trying to rename or delete adatabase that was imported via drag and drop onto the File Explorer window.
IDEALib.py (custom	9554	CAS-40849	Resolved issues caused by 0000-00-00 date values.
function)	12457	CAS-53943	Resolved issue where IDEALib.py could not run in the Frenchand Spanish versions of IDEA.
Installer	12010	CAS-51803	Resolved issue encountered when a space character is in the IDEAx64install.log file path within the installer command line.
	14006	CAS-61847-L8N7Y1	All EXE components have been signed so that they are nolonger flagged by security software.
Language Browser	7481	CAS-33059	Removed case sensitivity in the destination path for ProjectManagement.RenameDatabase.
	9082	CAS-39631	Resolved issue where ProjectManagement.Databases ignored lowercase file extensions.
Library	13359	CAS-58182	Resolved issue encountered when trying to rename or delete adatabase that was imported using the right-click Import command in the Library window.

Feature	ID	Case	Description
Random Record Sampling	11531	CAS-49435-N0D3B7	Resolved issue in the Random Record Sampling History that displayed a "Stratification from:" label instead of a "Sampledfrom:" label.
Report Reader	11701	CAS-49650	Resolved issues encountered when previewing a databaseusing a registered IDEA product or when connected to a CaseWare Network License Server.
Security	14521	CAS-70582, CAS-71187, CAS-70713	Upgraded the log4net.dll so that it is not flagged duringvulnerability scans.
Summarization	11385	CAS-13611, CAS-42183, CAS-50712	Resolved issue where the re-run Summarization task does notretain the Create database check box state.
Text Import	9235	CAS-40136	Resolved the empty field creation issue encountered when importing a CSV file that contains a comma at the start of atext string (e.g., ", example").
	12133	CAS-52517	Resolved crash issue encountered when importing a CSV file.
User Interface	10443	CAS-44068	Resolved issue where changing the font size also changed thefont style.
	11075, 11257	CAS-47040	Updated old icons in the Field Statistics window, Print Previewdialog box, and the Active Files drop- down list.
Visualization	11670	CAS-50199	Resolved a crash issue that occurs when selecting a databasewhen its path (path including project name but not database name) is greater than 132 characters.
			An informative error message is now displayed.

Known Issues

Feature	ID	Description
Project Overview		Due to Project Overview enhancements in IDEA 12, Project Overview information loss canoccur if IDEA 12 Managed projects are opened in IDEA 11.x and earlier.
Summarization		Summarization and Quick Summarization are encountering issues handling Error data and0 (zero) data. In some cases, Error data is displayed as O values, and 0 values are displayed as Error.

SmartAnalyzer

The current release provides new app-related features and some improvements of existing functions and features available in SmartAnalyzer. Note that the availability of the app- or audit test-related features depends on the apps or audit tests you have on your machine and on whether they support the new features or not.

See the New Features and Enhancements topic in the SmartAnalyzer Help available in the File tab of the Select and Run and Results and Reporting modules.

This release includes the following new features:

The complete SmartAnalyzer user interface has been updated to match the updated IDEA user interface. The redesigned icons better indicate the underlying functionality and provide you with an optimal user experience.

The new AutomationID tool lets you automate content items such as app workflows and audit tests. The tool reads the IDs from the SmartAnalyzer database that contains the content items of all the apps you have acquired. You can then select the content item (e.g., audit test) to automate, and the tool gets the corresponding ID information required to automate the audit tests.

This release includes the following enhancements: Performance improvements:

There is a significant performance improvement when running analyses if an IDEA project contains many files (e.g., more than 5,000 files in one project). There is a significant performance improvement when using the Input Assistant to enter parameters for audit tests.

Default document structure for SAPB. DART feature:

Validates field names in files that generate an index.xml file. Renames the imported files that do not have unique file names.

The Case Management feature supports corporate structures such as larger entities with their subsidiaries. When creating the corresponding audit folder structure in Case Management, a

SourcFiles.ILB folder gets generated for the entity and each subsidiary. Therefore, each subsidiary's source files are contained in their own SourceFiles.ILB folder.

This release includes the following bug fixes:

All references to IDEA Server have been removed from the app workflows. Resolved the issue encountered when trying to read the audit test resource file. Resolved a licensing issue related to the Default document structure for SAPB. DART.