# Upgrading Audit Planning & Quality

The following changes were made for the Audit Planning & Quality use case in version 2024.11. Use this section to review changes to existing applications and questionnaires when upgrading Audit Planning & Quality.

The Archer Audit Planning & Quality use case incorporates new application Agile Planning Board as a standalone offering. We have implemented following changes:

Agile Planning Board:

* The agile planning board is designed to give companies a complete view of their audit plans.
* It allows you to see current engagements, upcoming ones, a backlog of pending engagements, and those that have been completed. By presenting all engagements this way, companies can be more adaptable, bringing in engagements as necessary to support their business goals and objectives.
* We have enabled Advanced Workflow Functionality, enabling the board to refresh according to user preferences.

Renaming of the Application and Referenced Field Names:

* We have updated an application name and some reference fields. The Plan Entity application has been renamed to Proposed Engagements and their respective reference field names are also updated.

For information about the Archer 2024.11 release, see the Archer 2024.11 Release Notes.

New Section

The following table lists the new section added to the use case application.

| Application | Section |
| --- | --- |
| Audit Engagements | Audit Proposed Engagement |

New Fields

The following table lists the new fields added to the use case applications.

| Application | Fields |
| --- | --- |
| Audit Engagements | Calculated Field: Audit Plan Status |
| Proposed Engagement | Calculated Field: Audit Plan Status |

Renamed Fields

The following table lists the fields updated in the use case applications.

| Application | Fields |
| --- | --- |
| Audit Engagements | * Proposed Engagement Deferred? * Proposed Engagement Hours * Proposed Engagement Expenses * Audit Proposed Engagements * Inherited Proposed Engagements Permission |
| Task Management | * Audit Proposed Engagements |
| Proposed Engagement | * Proposed Engagement Name * Proposed Engagement Scope * Proposed Engagement Combination |
| Audit Entity | * Proposed Engagements |

New Data Feeds

The following table lists the new data feeds in the use case applications.

| Application | Objects | Data Feed |
| --- | --- | --- |
| Proposed Engagements | Data Feeds | APB: Backlog to future Section |
| Audit Engagement | Data Feeds | APB: Future to Active to Closed |

Updated Old Data Feeds

The following table lists the updated old data feeds in the use case applications.

| Application | Objects | Data Feed |
| --- | --- | --- |
| Audit Engagement | Data Feeds | * Audit Engagement Scope Population from Engagement Templates Data Feed * Audit Engagement Scope Population Data Feed |

New Application

The following table lists the new applications in the use case.

| Application Name | Objects | Description |
| --- | --- | --- |
| Agile Planning Board | New Application | * Created Sections * Created Fields * Updated Audit use case license * Updated Access Roles |

New Report

The following table lists the new reports in the use case.

| Application Name | Objects | Description |
| --- | --- | --- |
| Proposed Engagements | New Report | AAB: Proposed Engagement: Backlog to future Section |
| Audit Engagement | New Report | AAB: Proposed Engagement from Future to Active to Closed |

Updated Reports

The following table lists the updated reports in the use case.

| Application Name | Objects | Description |
| --- | --- | --- |
| Audit Engagements | Updated Report | * DFM: Audit Scope populations from Templates * DFM: Audit Engagement Scope Population Source Report |