Version 9.1.136 (13 January 2025)

Performance Management

Able to capture contract although period closed (#123871)

Problem

- When a phase is already closed, the dial can be used to view the contract, but the actions (Eg. creating a KPI) are still active.

Solution

- Lock the agreement if the phases are not active.

PM V9 Action plan copy from previous does not work as expected (#124270)

Problem
4 Action plan-related fixes on this PR.

1. This label was updated, it does not reflect Review Periods but rather the Review Setups
2. There was some confusion as to how the Copy Action Plans From Previous should work, the consensus between me, Bertie and Lee-Ann is that you can only copy from your previous review years. You cannot use this to copy APs from an earlier Review Period within the same setup (This should happen with the CreateContractFromPrevious fix 4) Changed the query for the review years to exclude the year for the current contract.
3. The Copy Action Plans From Previous was not copying all the information, only Name and Description. Including now all AP fields on the copy.
4. When doing CreateContractPeriodFromPrevious it must also copy any Action Plans that exist on that contract period. (which it did not do)

Solution

1. Updated the translation to correct the label to show Review Setup
2. Changed the query for the review years to exclude the year for the current contract.
3. Modified the Action Plan handlers and queries to select all the additional information and to also copy that when creating the item. Had to fix an update here and there
4. Added a new portion to the CreateContractPeriodFromPrevious handler to check if there are any action plans on the source and then copied that to the new contract. Tries to copy the Ad-hoc items as well as those assigned to specific KPIs.

Cannot Copy from previous (#124269)

Problem

- The CopyFromPrevious / CopyFromTemplate functionality breaks when creating for an employee on a review setup that has leadership behaviours enabled.
- This is because only managers get the section added to their contracts, but the copy from then tries to add the default library items to the employee's contract.
- This breaks because the LB section does not exist to add it to.

Solution

- Do a check to not add the LB items if the employee is not a lIne manager.
- The preceding Create Contract step will not have created the ContractPeriodSections LB section if the employee is not a line manager.

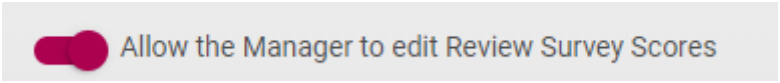
Import the 360 Survey Scores into Performance Management (#112612)

On the Review Years | Review Setup | Review Period | Review Survey

- Add a dropdown with all the Evaluation Periods (V8)
  - Evaluation Period
    - Required field
    - Master Data Table to be added with the 360 Evaluation Periods from v8

- Add a dropdown with the Import Actions
  - I want to import
    - Options
      - ONLY new scores
        - When selected, show helper text

        - Import new evaluation scores from [selected evaluation period]. Leave existing scores as is.
    - New scores and override existing scores (from evaluations)
        - When selected, show helper text
            - Import new evaluation scores from [selected evaluation period]. Existing scores will be overridden.
            - Business Rule:
                - When the setting is inactive and the Manager cannot revise, exclude this option



- Integration Tab on Ruleset Setup
    - Review Year Review Survey Import
        - When selected, the scores should import according to the option selected via the API
        - Import from last sync / import date
        - Also add a daily sync
        - Only run when a Review Setup has a Review Survey

People Management

Error on New People Group Save (#124474)

Problem

- People group HiLo sequence did not match the Id value in the table that caused a duplicate trying to be created for the same Id

Solution

- Add a script to sync the sequence with the table

The page is shown as blank after Saving on editing details (#124445)

Problem

- When saving or refreshing some subtabs on the people management profile, the tab content shows blank.

Solution

- Fixed an issue where only the parent tab, instead of the sub-tab, was always loaded when reloading the page

Auto-generate employee number (#122694)

- Add a setting that will automatically generate an employee number for a new user on the system. Allow the admin to set the starting value in the range.
- Also, allow the administrator to set prefix and suffix values for the employee number.

Report Builder

Evaluation questions (#123006)

Problem

- Report contain duplicate records.

Solution

- Added a "Select Distinct" filter for the reports

Imports

Import Error (#124391)

Problem

- The allow anonymous tag has been removed which causes the daily syncs to fail.

Solution

- Added anonymous tags to ensure the daily syncs work again.

Translations

Investigate changing translation keys from key-based to file-based (#119512)

Problem

- Translation calls need to be improved, it is used extensively throughout the system

Solution

- Investigate to cache the translations with a different key strategy - perhaps we store the entire translation file (JSON object) within a single key

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