

Version 9.1.166 (30 June 2025)

Report Builder

Objective Settings Queries (#133021)

Problem

- The Select Distinct set on the report is not applied when exporting, only on viewing, leading to duplicate records being displayed when exported.

Solution

- If DistinctRows is not provided, fall back to the configuration on the report.

Allow report builder admins to set certain filter criteria fields as drop-downs in a report (#129916)

New Development

User Story 1 - Add a step to the DWH SSIS packages

- Add a step on the DWH SSIS packages to check for any filters that are of Operator type 'Is Equal to (from List)', and then select a unique list of the values into a new table that contains the relevant data source ID and data field ID and then the individual item values. E.g.

DataSourceId	DataFieldId	RulesetId	ListItemValue
1	1	10	FY24
1	1	10	FY25
1	2	11	Mid-Year
1	2	11	Final

User Story 2 - As a Report Builder Administrator, I want to have a new operator available named is equal to (from the list)

- Add a new filter Operator
 - Is equal to (from list)
- When this is the operator type, do not show the input, as the list will be determined at runtime
- Ensure the data that is displayed is Ruleset-specific

User Story 3 - As a Report User, I want to select the dropdown with the available values

- Modify the View Report page to check for 'Is Equal To (From list)' filters and prefetch the unique values from the DWH table created above, add them as list items to the page
- When the report is run the actual text value is still sent through, modification required to the report builder SP to handle 'List' operator filters as if it is 'Is Equal To (From list),' which does an exact match
- On the end-user view, the filter will show as follows, where the edit box on the right will show as a drop-down list.

Report Builder: Date Parameters Logic vs Results (#132813)

Problem

- When date filters were being applied, it would also consider the time and thus end up being inconsistent and unintuitive

Solution

- The date filters should only consider the date value, not the time at all

Help Files

As a person with access to the Help Files, I want to have an updated layout with feedback functionality (#129792)

Problem

- Change the help page modal's text to be more descriptive. Change the toggle functionality such that when checked, it would allow the content to be shown instead of hiding the content (reversed current toggle logic). For consistency, I standardised the pop-up design by adding a close (X) button to the top-right corner of all general modals (Only general modals for now).

Solution

- Added a generic close button at the top of each general modal. I also updated the help page's translations and fixed how the toggle works.

Add a feedback Template (#131914)

Problem

- The help screen modal should allow users (managers, employees, or administrators) to provide feedback on different parts of the system.
- It should have a feedback button to provide access to the new feedback functionality.
- The feedback form should show a new modal with three questions rendered as a partial view inside the modal.
- There should be appropriate error handling and navigation flow management.
- Upon submission, the following information should be sent to the Official Signify Documentation Email:
 - A screenshot of the parent page embedded as a base64 image.
 - The URL of the current window location.
 - User details: username, first name, surname.
 - Ruleset ID.
 - Responses from the completed form.
 - This functionality should be integrated using the existing "manual test notification" method.

Solution

- Altered the help page modal to include a button for showing the new feedback form.
- Added a new modal in the original CSHTML page containing the help page modals.
- Had the new feedback modal load the questions to answer in a new partial view, which uses JavaScript to manage when certain questions should be shown and other navigation flow management.
- Added translations for the new feedback modal in the languages
- Reused an existing method to send notifications. Most values are hardcoded, as they are unlikely to require changes.

Add feedback form (#131915)

- When the feedback button is clicked, open a new feedback model
 - Get the template ID from the notification service based on the code
 - Get the user data from the users service
 - On the model, implement show hide accordions according to the selection
 - When feedback is clicked, trigger the manual test notification with the following
 - Send an email to documentation@signify.co.za
 - Include the data
 - Screenshot of parent page embedded as a base64 image
 - URL from window location
 - Username, name, surname,
 - RulesetId
 - Answers from the completed form
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Performance Management

Manager rating cannot be saved - error message (#133058)

Problem

- When FinalRatingsOnly is enabled and the items are interpolated, it does not save the Manager Score along with the Final score (as it would when not interpolated). This causes the validation to fail when trying to approve the ratings.

Solution

- Ensure that the manager score values are also saved when the ratings type is FinalOnly, and correctly update the SPA after the save.

PM UPLOAD document button missing (#132985)

Problem

- When the contract is in the Objective phase but not yet in the Rating phase, users are unable to upload documents. As the Ratings phase where the only phase that where being checked/validated.

Solution

- Updated the validation logic to correctly parse and assess the current contract phase, ensuring document uploads are allowed during appropriate phases.

Incorrect Total after 10/10 Self-Rating and Error on Submit Final Rating (#131647)

Problem

- The scores within ContractPeriods do not round correctly when they round to above 100

Solution

- Adjusted the rounding issue for ContractPeriods scores to ensure it does not exceed 100

Move the "Modify Final Scores" option to the dashboard (#93147)

Problem

- When an agreement has been finalised and rated, you need to navigate within the agreement to select 'Modify Final Rating' when wanting to modify the agreement

Solution

- Added new Ellipse menu item to modify the Period Contract, and a new modal to select the Review Period to modify.

Radio buttons not behaving correctly (#121338)

TBC

Data Warehouse

Implement Additional Billing Fields for subscription (#132464)

Problem

- The default decimal precision of the decimal columns was set to 2, causing the entity framework to not update correctly, and the data not being there to be saved

Solution

- Set the decimal precision to match the appropriate values (38 numbers, 18 decimals)

Absenteeism tracking (#132467)

Problem

- The client requires a report that will show the absence history

Solution

- Added a new DataSource called ImAttendance that will provide the required data

Report Builder: 200 Data Value Fields in the HR Process Request Pivot Data Table (#132915)

Problem

- jpHRProcessRequestPivotData requires 100 extra custom fields

Solution

- Add 100 extra custom fields within jpHRProcessRequestPivotData

Years of service report (#133024)

Problem

- Field YearsOfService is required as requested by the client

Solution

- Added new field YearsOfService within Appointments

Learning Management

Manual overriding of marks - Report cards (#132474)

Problem

- Cannot add a negative mark that will not be counted in the average

Solution

- Allow the Teacher / Administrator to add a -1 for an absent student
- This mark should then be excluded from the average calculation

As an Administrator with access to the Learning Management setup, I want to import the Training Requirements and export the list (#131531)

New Development

Create an import file to import the Training Requirements

- Country
- Training Intervention Code
- Training Intervention
 - Required Field
- Job Title
- Organisational Unit
- Job Grade
- Start Date in Position
- Requirement Start Date
- Requirement End Date
- Days required to complete the training

Validation

- If a Country Master Data value does not exist, the entire record will be rejected
- If a Training Intervention Code does not exist, the entire record will be rejected
- If a Training Intervention Code does not match the Training intervention, the entire record will be rejected
- If a Training Intervention does not exist, the entire record will be rejected
- If a Job Title does not exist, the entire record will be rejected
- If an Organisational Unit does not exist, the entire record will be rejected
- If a Job Grade Master Data value does not exist, the entire record will be rejected
- The Requirement Start Date cannot be after the Requirement End Date
- The Requirement End Date cannot be before the Requirement Start Date

Export

- Add Export functionality to export the table

Tenant Management

Time to be displayed on the system Close Date shown on Description tab (#129940)

Problem

- The time does not show for the System Close Date

Solution

- Ensure the time component is also displayed

Dates not displayed according to what was set on the update (#130503)

Problem

- When viewing the dates on the system, they do not match up with what has been set. It appears as though the date 202504-10 11:59 is shown in UTC +2, which would be 2025-04-11 @ 1:59.

Solution

- Fixed system close dates not displaying consistently across the system.
 - We also now display (at the end of the day) next to the dates, to make clear when the system will close or expires.
 - Finally, display "Expired" vs "ExpireS" on based on if the expiry date is in the future vs if it is in the past, when displaying the warning for system admin users.
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Imports

Payspace Employee import rejections (#132840)

Problem

- When pulling users from Payspace, users without ID numbers have no employment statuses and are excluded from mapping without a reason.

Solution

- When the user does not have an ID number, fall back to the employee number when grouping the user's appointments to retrieve the latest record
- Add error logs for the users who are excluded
- Stage the excluded users into user staging for the Payspace import
- Ensure the provinces can be created case and culture-invariant.

Another rule to be aware of is that the Payspace pull only imports terminated users when they already exist on the ruleset with the payroll ID from Payspace. Any user terminated on Payspace before today that does not exist in the payroll ID on the ruleset is excluded and will not be imported.

Import log shows successful, but transaction log is empty (#132526)

Problem

- Not all import types are developed to export data; therefore, when a user clicks 'User validation report', it will export but have no data

Solution

- Add a new check to validate and ensure the import type is allowed to be validated

Automated Employee Details Import (1) (#104244)

Problem

- The import service Swagger is not working.

Solution

- Rename the duplicate message in the proto
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Content Management

Bulk signing attempts fail immediately (#132716)

Problem

- When trying to sign attempts on multiple assessments, the process fails immediately. The retry also fails immediately.

Solution

- Add option to retrieve document by external request ID used for retry in V8

License documents are not digitally signed (#132379)

Problem

- When you print a license and then save it as a PDF, it does not have the certificate to show that it has been digitally signed.

Solution

- Correct problem when there is more than one signatory, the subsequent signatures show as invalid
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People Management

Username with ' in it displays wrong when clicking on Performance Management tab (#132879)

TBC

Revision #2

Created 12 June 2025 10:52:43 by Lee-Ann Janse van Rensburg

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