

# Release 1.4.0 (13.12.2024)

## Features

### • **WICORE-69 - Kanban Board for Incident Reports**

- A Kanban board has been added for the Incident Reports module. Users can now view tasks in two formats: Table and Kanban board. The board columns represent task statuses.

### • **WICORE-22 - Link Clients to Selected Projects in Requests**

- When creating a request, the client selection is now tied to the selected project. The **Clients** field will remain inactive until a project is chosen, ensuring only relevant clients are displayed.

### • **WICORE-51 - Jenkins API Integration**

- Integrated the Jenkins API into the system. This enables interaction with active pipelines and integrations through API endpoints.

### • **WICORE-50 - CI/CD Backend Architecture**

- Implemented the backend architecture for the CI/CD module, including viewing active pipelines and their integrations via API.

### • **WICORE-48 - Run Pipelines Functionality**

- Added functionality to initiate pipelines and receive notifications on whether the execution was successful.

### • **WICORE-46 - Polling for Pipeline Status**

- Introduced polling to continuously check whether pipelines are running and display their current status.

## • **WICORE-47 - Display Pipeline Status and Names**

- Jenkins pipeline statuses and names are now displayed within the system for better visibility.

## • **WICORE-33 - New Fields for Clients: Nationality and Risk Level**

- Added **Nationality** and **Risk Level** fields to the client model. These fields are now visible in the interface, editable, and included in client records.

## • **WICORE-32 - Add Request Types**

- A **Types** field has been added to the Requests module for categorizing requests.

## • **WICORE-34 - Client Order Number API Endpoint**

- Developed an API endpoint in OpenAPI to retrieve the sequential order number of a client.

## • **WICORE-43 - Simplified Button Titles**

- All button titles starting with "Add ..." have been renamed to just "Add" for better readability.

## • **WICORE-61 - Projects Usage Scheme in CRM**

- Created a detailed scheme explaining how projects influence various CRM modules. It includes user permission scenarios and their effect on project display and functionality.

## • **WICORE-62 - Update Emails for Requests on Release Branch**

Requests are now updated with new email data on the release branch to align with platform configurations.

## • **WICORE-56 - Project-Based Module Display**

This task represents a significant improvement in managing and displaying data for specific projects within the CRM. Below is a detailed description of the task and its impact:

## Core Functionality

### 1. Project Selection

- The selected project dynamically filters data across all modules, displaying only relevant information.

### 2. Changes at the Module Level

- **Viewing a Single Project:**
  - When a specific project is selected, tables across all modules display data related only to that project.
  - The **Project** column is hidden in this mode, as it becomes redundant.
- **Viewing All Projects:**
  - When "All Projects" is selected, tables display data from all projects.
  - The **Project** column is shown in this mode to distinguish records by project.

### 3. Integration with Core Banking

- All Core Banking configurations, such as currency settings, are now linked to specific projects.
- This allows each project to have its own rules and settings, enhancing flexibility.

## User Permissions and Access Control

- Access to project-related data depends on user permissions:
  - **Users with full access:** Can view and manage data for all projects.
  - **Users with limited access:** Can interact only with data from the projects they are assigned to.
  - This ensures data confidentiality and restricts access to sensitive information based on roles.

## Customization and Flexibility

- This functionality offers a high degree of flexibility to meet diverse organizational needs:
  - Projects can be configured independently with unique parameters and workflows.
  - Users can work in an isolated environment for a single project or view data across all projects if they have the required permissions.

## Technical Enhancements

### 1. Dynamic Queries and Filters

- Server-side queries dynamically adapt based on the selected project, ensuring users see only relevant data.

### 2. Improved Interface and UX

- Clear visual indicators showing the currently selected project.
- Adaptive design for seamless switching between projects.

### 3. Integration Across All Modules

- The project selector is integrated into all modules ensuring a consistent user experience.

## Business Impact

- **Improved Data Segmentation:** Allows teams to focus on their assigned projects without being distracted by irrelevant data.
- **Enhanced Customization:** Organizations can configure settings for individual projects, improving operational efficiency.
- **Better Collaboration:** Teams working on multiple projects can quickly switch and access necessary data.
- **Reliable Access Control:** Ensures compliance with data security policies by restricting access based on roles and permissions.

## • WICORE-60 - Encryption/Decryption Flow Documentation

- Developed a detailed scheme explaining the encryption and decryption flow.

## • WICORE-10 - RabbitMQ Exchanges Scheme for Projects

- Created a scheme to demonstrate how RabbitMQ exchanges are utilized across projects.

## • WICORE-21 - Default Zero Balance for New Assets

- The **Balance** field now defaults to **0** when creating new assets. Users can modify this value during the creation process.

## • WICORE-3 - Test Client Data Updates with Integrations

- Tested updates to client data in integrations when changes are made to their information within the CRM system.

## • WICORE-5 - Move Client Data Updates to Patch Branch

- Moved the functionality for updating client data in integrations to the patch branch for consistency and stability.

## • **WICORE-31 - Import Clients Implementation**

- Implemented functionality to import clients into the system, streamlining client data migration from external sources.

## • **WICORE-39 - Import Clients UI**

- Developed a user-friendly interface for the client import feature, making it easier to manage imported data.

## • **WICORE-38 - Default Color for Statuses in Configurations**

- When creating new statuses for clients or requests in the configurations module, a default color is now automatically assigned to ensure consistency.

## • **WICORE-49 - CI/CD Pipelines UI**

- Created a user interface for the CI/CD Pipelines module to facilitate pipeline management.

## • **WICORE-37 - Input Validation for Session Time and Refresh Token**

- Introduced input validation for configuration fields such as session time, refresh token time, and login attempts. Negative values are now disallowed.

## • **WICORE-63 - Disable Label Field on Edit**

- The **Label** field is now disabled when editing entities in the "Types of Account" module to prevent unintentional changes.

## • **WICORE-26 - Rename Dashboard to Analytics**

- Renamed the **Dashboard** module to **Analytics** and added two new permissions: **view own** and **view all**. The module is temporarily hidden from the sidebar and will be reintroduced after further improvements.

## • **WICORE-45 - Updated Translation for "Edit" Permissions**

- Revised translations for role permissions: **Edit** is now displayed as **Create/Edit** to reflect the functionality accurately.

## • **WICORE-41 - Notification Instead of Logout for Restricted Actions**

- System users are no longer logged out when attempting restricted actions. Instead, an error notification is displayed, informing them of the restriction.
- **WICORE-28 - Add Actions and Reminders in Calendar**
  - Users can now create actions directly in the calendar module. A new action type, **Reminder**, has also been added for better scheduling and task management.

## • **WICORE-121 - Logs Service Architecture Update**

- The Logs service has been restructured, transitioning from ElasticSearch to MongoDB for storing log data.

## • **WICORE-30 - Redirect to Clients Page After Login**

- After logging in, users with access to the **Clients** module are automatically redirected to it. Users without access are redirected to another available module.

## • **WICORE-42 - New Icons for CI/CD and Security MS**

- Added unique icons for the CI/CD Pipelines and Security microservices for better module identification.

## • **WICORE-12 - Shared Library Integration Across Microservices**

- Integrated the shared library into all microservices for consistent functionality.

## • **WICORE-16 - Project Selection Based on Clients for Requests**

- Requests in the Core Banking module now automatically select a project based on the chosen client. The same functionality is implemented in the **Requests** tab under the Clients module.

## . **WICORE-13 - Simplified "Add" Button Text**

- Updated all **Add ...** buttons to display only **Add** for better consistency.
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## Bugfixes

### . **WICORE-99 - Chart Indexing in Buckets Module**

- Resolved an issue where larger charts overlapped smaller ones when switching between time filters (month/year) in the Buckets module analytics tab.

### . **WICORE-98 - Revert Email Update Changes on Clients' Platforms**

- Reverted changes related to updating client email addresses on the platform.

### . **WICORE-97 - Bugs Identified During Demo by Volodymyr**

- Fixed several issues identified during a demo meeting led by Volodymyr.

### . **WICORE-96 - Client Module Permissions Bug**

- Corrected a bug allowing users to assign "Encrypted Email" and "Encrypted Phone" permissions to roles without access to the client module. Now, a minimum permission level of "View Own" is required.

### . **WICORE-101 - Requests Visibility Issue with View Own Rights**

- Fixed a bug where requests were not displayed correctly when **View Own** permissions were enabled.

### . **WICORE-124 - Validation for Role Creation Without Permissions**

- Users can no longer create roles without assigning at least one permission.

## • **WICORE-125 - Restrict API Access for Deactivated Clients**

- Implemented API restrictions for deactivated clients to enhance security.

## • **WICORE-137 - Note Action Creation Issue**

- Resolved an issue preventing the creation of note actions for clients.

## • **WICORE-156 - Employee Permissions Issue in Project Edit Mode**

- Fixed incorrect employee permissions when adding or editing employees in the **Project Edit** mode.

## • **WICORE-162 - Employee Form Visibility Issue**

- The employee form is now visible with disabled fields when users have **View** permissions only.

## • **WICORE-171 - Calendar Visibility for Root Users**

- Removed the calendar module from the root user's view to avoid unnecessary clutter.

## • **WICORE-24 - Translation Display Issue in Roles Module**

- Corrected translation display for bucket rights labels in the Roles module.

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Revision #5

Created 22 November 2024 11:45:28

Updated 30 January 2026 19:44:36