Release 24.2

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24.2.0 Features

Data Retention

Warning:

The Data Retention Function allows users to permanently delete data from within the hosted environment. Resolver will not be able to recover any data that is deleted using this function. Users assume full responsibility for decisions to delete any data using the Data Retention Function, including compliance with their organization's own data retention policies and legal obligations. Such deletion will also override any data retention obligations which Resolver may have agreed with the Customer. Users who do not have authority to make such decisions should not be enabled with the Data Retention Function.

The **Data Retention Function** allows users to comply with their organization's data retention policy by giving users the ability to automate object deletion on a per object type basis to handle PII (Personal Identifiable Information) in Resolver responsibly. The **Data Retention Function** also gives users the option to retain non-PII data for analytics after an object has been deleted from the system.

Note:
Please contact Support to enable the Data Retention feature.

Benefits

- Deleting an object from the system will now purge the object's data from the Data Warehouse and Audit Trail.
- Automating object deletion.
- Retaining non-PII data for reporting purposes.

Supporting Documentation

Please refer to the following articles for further information on the Data Retention feature:

- Enabling the Auto-Delete Function Using a Scheduled Trigger
- Enabling Data Retention Analytic Settings
- Manually Deleting an Object

Administrator Settings

When you click the Administration icon in the top toolbar in Resolver, a menu will now appear that includes a new **Settings** section with options that allow Administrators to personalize their Resolver instance. These Administrator settings include:

- **Branding**: From this screen, Administrators can add their company's name and logo to the header in Resolver. Organization logos are available for email templates. Customer Administrators no longer have to do email template configuration work for sent emails to be branded (the **Logo Upload** tile was previously found under the **Tools** section in the ***Admin Overview*** screen).
- **User Management**: From this screen, Administrators can search through existing users and add new users (the **Users** tile was previously found under the **People** section in the ***Admin Overview*** screen).
- **Languages**: From this screen, Administrators can add a new language and import a language file (the **Languages** tile was previously found under the **Communications** section in the ***Admin Overview*** screen).

Benefits

- Administrators now have greater control and more customization options to personalize their Resolver instance.
- Easier access to personalize Administration activities.

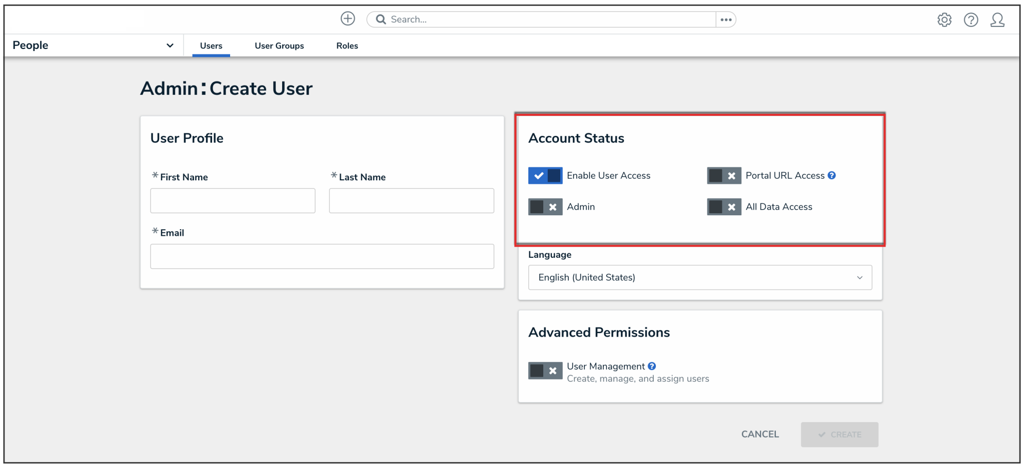
Supporting Documentation

Please refer to the following articles for further information on Administrator settings:

- Administrator Settings

24.2.0 Minor Features

When creating a new user, there is now a new **Portal URL Access** toggle switch which explicitly identifies a user assigned to a confidential portal.



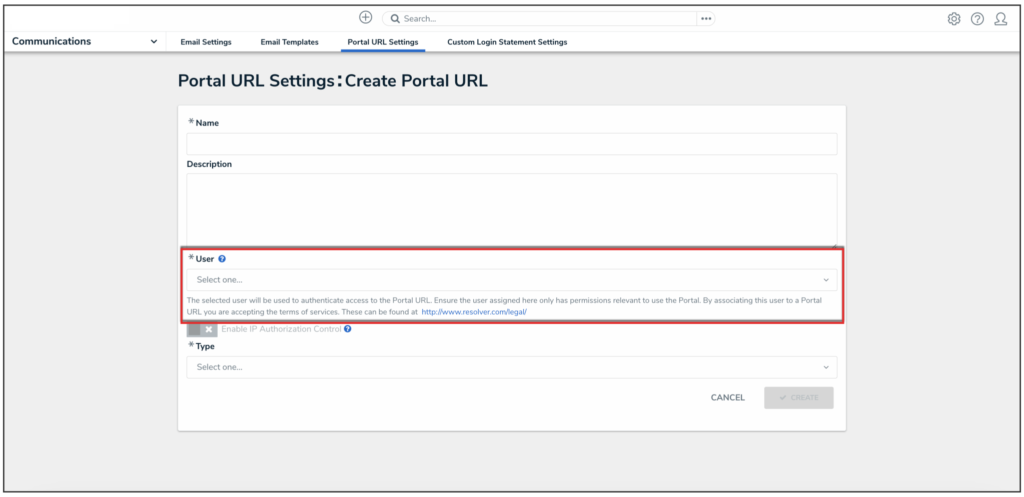
New Portal URL Access Toggle Switch

> ***Note:***
> The Confidential Login experience will remain the same, however there have been some name changes for page and button names. For a full list of updates, read the **UX Enhancements** section.

Portal URL users will now appear on the **Users** page with a **Portal URL Access** tag beside their name.

Portal Access URL User Tag

When creating a new Portal URL, only users with **Portal URL Access** will appear in the **User** dropdown.



User Dropdown

Portal URL Access

The **Portal URL Access** permission can only be removed from a user when the user is no longer assigned to a Portal URL. Administrators can view if a user is assigned to a Portal URL from the ***User Management: Edit User*** screen, under Portal URL Membership.

In the User Audit Trail, the **Add User** and **Update User** events have been updated so that the **User Type** reads Portal URL Access when the **Portal URL Access** toggle is enabled.

The User Export CSV will now have two new columns:

- The **Portal URL Access** column will list 'Yes' or 'No' depending on if that user has Portal URL access.
- The **Portal URLs** column will list any Portal URL that a user is assigned to.

Users with **Portal URL Access** permissions won't be able to access Resolver and will only be used to authenticate access to the Portal URL via the URL generated in **Portal URL Settings**.

When users who only have Portal URL Access user permissions attempt to log in to Resolver, they will be met with an error message. Users who have Portal URL Access user permissions only on some Orgs will be able to choose an Org where they are not Portal URL users to log in to.

Warning:
All users utilized in the Confidential Portal URL Settings will automatically be assigned to the Portal URL Access permission and cannot be used to log in to Resolver after this release. Please review your Portal URL Settings to ensure that you have a dedicated user for the Portal URL Access permission. For further assistance, please contact Support.

Benefits

- Administrators will now have more control of managing user access and reduce the chances for errors in assigning users as the incorrect user type and associated permissions.

Supporting Documentation

Please refer to the following articles for further information on the Portal URL user type:

- Generating a New Portal URL
- Create a New User
- User Audit Trail Events & Filters
- Logging in as a Portal URL User
- Creating a User List

Remember Login Details for 30 Days with MFA

Users using MFA (Multi-Factor Authentication) to log into Resolver, have the option to bypass MFA requirements for 30 days, but are still required to enter their login credentials (username and password) to complete the login process.

Benefits

- Users do not have to complete the authentication steps each time they log in.

Supporting Documentation

Please refer to the following articles for further information on Multi-Factor Authentication:

- Enforcing Multi-Factor Authentication on an Org
- Multi-Factor Authentication User Setup

View Archived Data in the Nav Tree of Navigation Forms

Users can now choose whether to include archived data in the nav tree of Navigation Forms.

All existing Navigation Forms will have this feature enabled, and Administrators will need to uncheck the box to not display archived data in Navigation Forms. New forms will have the feature disabled by default.

Benefits

- Users can easily decide whether or not to include archived data in Navigation Forms.

Supporting Documentation

Please refer to the following article for further information on viewing archived data in Navigation Forms:

- Create a Navigation Form

Resolver API - External Reference IDs Supported on Additional Endpoints

The Resolver API has been extended to support the use of External Reference IDs on additional endpoints to streamline integration capabilities and portability between Orgs and environments.

Users can now add an optional `byRef` URL parameter on the following endpoints:

- **GET** `user/user/{id}`
- **PUT** `user/user/{id}`
- **DELETE** `user/user/{id}`
- **GET** `/object/field/{fieldId}/option`
- **POST** `/object/field/{fieldId}/option`
- **GET** `/object/objectType/{objectTypeId}/objectLifeCycle/{lifeCycleId}/state`
- **GET** `/object/objectType/{objectTypeId}/objectLifeCycle`

If the `byRef` parameter is included in the URL and is set to TRUE, the endpoints will require external reference IDs in place of the internal IDs when making the API call. Setting the `byRef` parameter to FALSE or not including the `byRef` parameter will require the use of internal IDs when making the API call.

Note:
For users with existing integrations using any of these endpoints, no updates are required. The `byRef` parameter is optional and the endpoints will continue to function as they currently do if this parameter isn't included.

Excel Data Import File Size Limit

If a user attempts to upload an Excel data import file that exceeds the 15MB size limit, they will now receive an error message prompting them to reduce the size of the file. This size limit doesn't affect other zipped attachment file size restrictions currently in place.

If a user receives the file size error message, they should reduce the size of their Excel import file by breaking the file up into multiple smaller files and upload the file again.

Additional Currency Symbols for Formula Formatting

The following currency types can now be selected when formatting a formula as a numeric currency field:

- $ AUD
- $ CAD
- $ HKD
- $ NZD
- $ USD
- £ GBP
- € EUR
- ₣ CHF
- ¥ CNY
- ¥ JPY

The format of the currency value will automatically change based on the currency selected.

Currency Type	Currency Value Format
$ AUD, $ CAD, $ HKD, $NZD, $USD	$ 1,234.56
£ GBP	£ 1,234.56
€ EUR	1,234.56 €
₣ CHF	1,234.56 ₣
¥ CNY, ¥ JPY	¥ 1,234.56

> ***Note:***
> When formatting a formula, the currency symbol in the **Layout** field will not update to reflect the currency chosen.

Data Audit Trail Cleanup

The names of events in the **Data Audit Trail** have been updated to better describe what happened in the event. The new names are as follows:

- **Discard Changes** is when you discard the changes made to a field (previously named Update Field).
- **Edit Online** is when a file is opened in a Microsoft Office online document editor (previously named Update Field).
- **Update File Version** is when a new file version has been uploaded for a particular field (previously named Update Field).
- **Update File Name** is when a file name has been updated in a field (previously named Update Field).

New Events and Actions Added to the Data Audit Trail

Users will now be able to view these new Events and Actions in the Data Audit Trail:

- **Preview Attachment** when an attachment is previewed
- **Download Attachment** when an attachment is downloaded
- **View Report** when a report is viewed
- **Download Report** when a report is export

Supporting Documentation

Please refer to the following article for further information on the updates to the Data Audit Trail:

- Filtering the Data Management Audit Trail

Updated Max Allowed Edges Messaging

If a user tries to add an additional relationship beyond the predetermined number set by a maximum allowed edge set, an error message will appear that explains why the additional relationship cannot be added.

This behavior is now consistent across both the Creation and Edit workflows.

Preview PDFs with Document Management

Users can now preview PDF attachments in Resolver with **Document Management**.

> ***Note:***
> Document Management must be enabled to use this feature.

You can preview PDFs either within the same tab or in a new tab.

Supporting Documentation

Please refer to the following article for further information on previewing PDFs with Document Manager:

- Previewing a File

Update Name Concatenation After Object Creation with a New Workflow Action

Users can now update Object names beyond the **Creation** state of a workflow. With the new workflow action, **Update Field Concatenations**, concatenation results can be recalculated as part of the workflow.

For example, Incident name concatenations can now be automatically updated after they transition from the Triage state to the Open state.

> ***Note:***
> The new **Update Field Concatenations** workflow action is only available for button triggers in Library and Assessment workflows.

Benefits

- Users can now save time on manually updating Object names across Resolver.

Supporting Documentation

Please refer to the following article for further information on the Update Field Concatenation workflow action:

- Add an Update Field Concatenations Action to a Transition

An Enhanced Duplicate Roles Experience

When an Administrator duplicates a role, they will now be able to duplicate that role as either a Global or Explicit role type with the new **Enable Global Membership** checkbox.

For example, Administrators can design a new Global *Executive role* based on the configuration of an existing Explicit *Team role*.

> **Note:**
> When duplicating a Global role and converting it to an Explicit role, the Administrator will also need to add that new role to the Object Type and define the inferred permissions path.

Benefits

- Users can now minimize configuration efforts in duplicating a role as another role type.

Supporting Documentation

Please refer to the following article for further information on duplicating roles:

- Creating a Duplicate Role

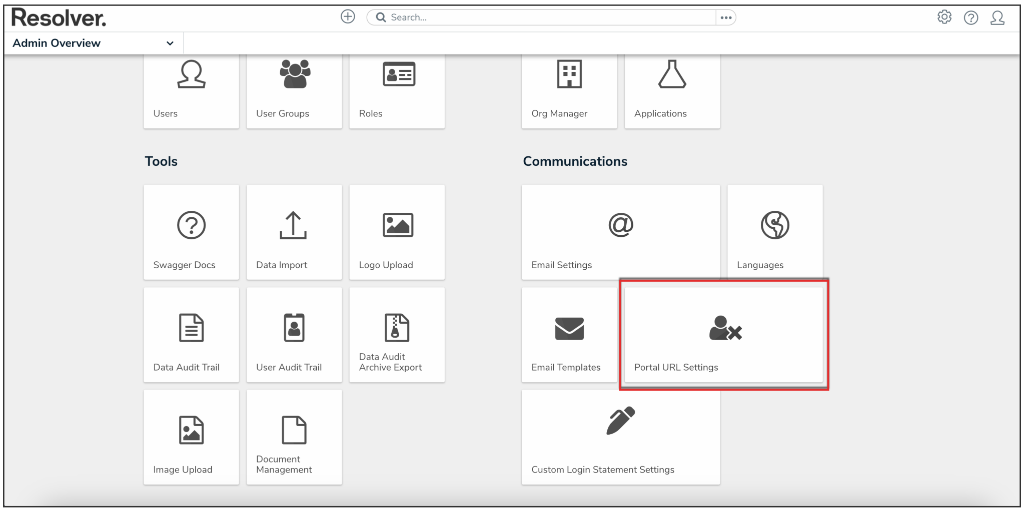
Safari Browser Support for Language Translation

There is now extended support for language translation when using Safari to view the Privacy Policy in the Confidential Portal. Resolver will give preference to the Safari system language setting when the combined language and region isn't available in Resolver.

UX Enhancements

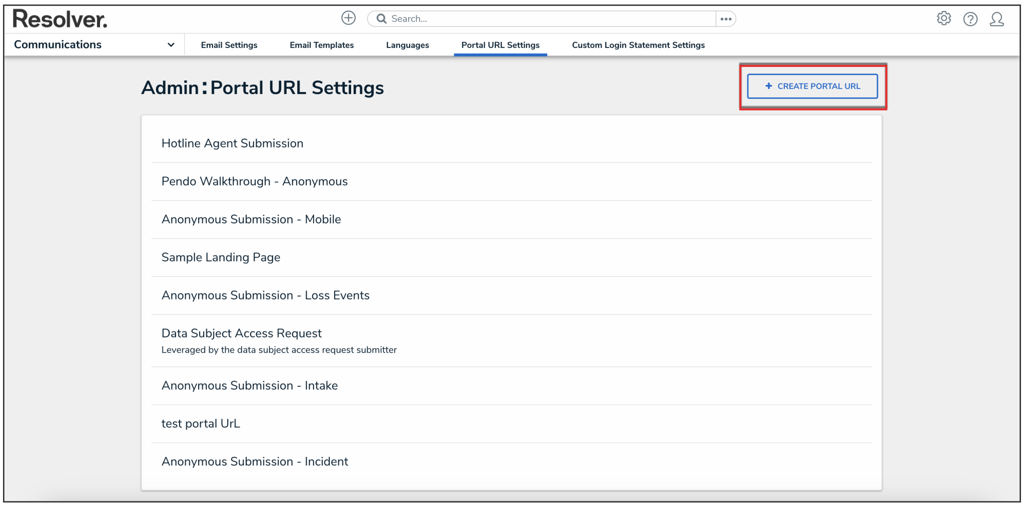
Portal URL Settings

In the ***Admin Overview*** screen, under the **Communications** section, the Portal Settings tile is now named **Portal URL Settings**.



Portal URL Settings Tile

The **Create Confidential User** button is now named **Create Portal User**.



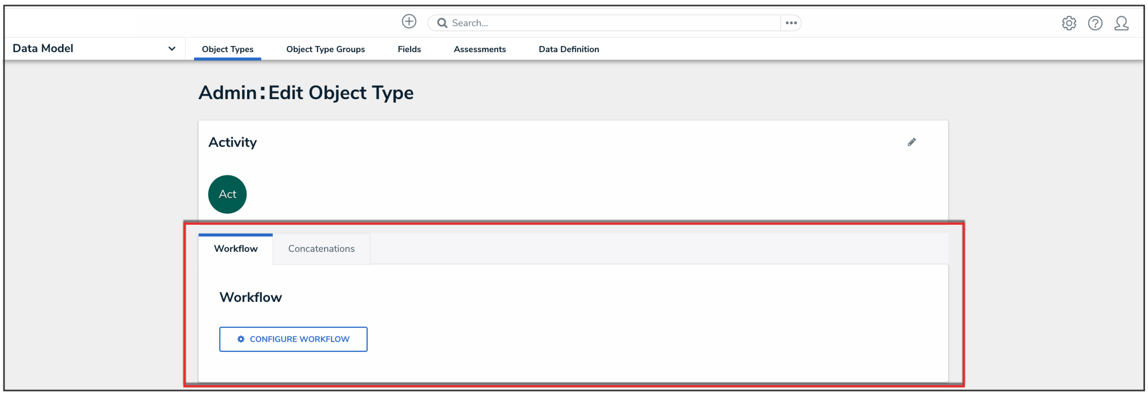
Create Portal User Button

These screen names have also changed to match this new naming convention:

- Portal Settings: New Confidential URL is now ***Portal URL Settings: Create Portal URL***
- Portal Settings: New Confidential URL is now ***Portal URL Settings: Edit Portal URL***

New Workflow and Concatenation Tabs

In the ***Edit Object Type*** screen, the **Workflow** and **Concatenations** sections have been moved to separate tabs.



Workflow and Concatenation Tabs

UX Improvements

- Improved the alignment of the Add button for Assessment scoping list items.
- Corrected the text color of entity tags in dark mode for better readability.
- The month inside the date picker is no longer highlighted yellow when selecting a required date.
- Workflow trigger buttons will no longer darken on right click, and now resets to the original

button colour.

- The numbers typed into a numeric field no longer disappear, regardless of typing speed.
- The caret/chevron restored to the right side of dropdown menus.
- The My Tasks search popover now opens and closes correctly.
- The text typed into text properties and fields no longer disappears, regardless of typing speed
- When exporting a report to Excel, tables with no colored cells will remain uncolored.

New Content Translations

Please review the file below for all new content translations added to the system.

Release 24.2.0 Translations Update List.xlsx

If your organization is utilizing the Language Translation feature, please download a new Language template (for your required language) and filter the **Language** column (last column) by empty cells, indicating new content. Any empty cells in the **Language** column must be translated, and the Language Template file must be uploaded to the system for changes. For further information, please refer to the Add a Language article.

Improvements

- Improvements have been made to Resolver's email service to prevent duplicate emails being sent to users.
- Now, when an Assessment launch or rescope has been completed, its locks will be lifted without the user needing to refresh the screen or navigate away.
- Users can now load a newly created Assessment navigation form while Objects are added to its scope.
- Now, when a user confirms the scope of an Assessment, they will be brought to the form they initiated the launch from.
- Now, when a user launches an Assessment, the notification banner will persist between screens and notify the user of success and/or failure regardless of which screen they navigate to.
- Now, when an Assessment launch or rescope has been completed, its nav tree will be load without the user needing to refresh the screen or navigate away.

Bug Fixes

- Related Objects will now display on the Relationship table, without a page refresh, when an Object is added.
- The Last Modified Date on an Object won't be updated when the Pull Data Value action

doesn't update any values on the Object, or when an Object transitions to another state and no values are updated.

- Conditional workflow transitions that include variables will now successfully transition the Object when conditions are met.
- There will no longer be an additional space after an apostrophe in PDF exports.
- Fixed an issue where the Gross Floor Area Estimation Orchestration Event would fail for users without All Data Access.
- Fixed an issue where Excel would not recognize cells as numbers in exported reports when the field types were set to numeric in Resolver.
- Fixed an issue where location properties were missing from concatenated Object names.
- Fixed an issue where formula variables did not display the source field, formula, or state information on Relationship variables.
- Fixed an issue where the name of a navigation form could not be updated without typing slowly.
- Formula evaluations displayed on forms will now respect the negative display format when selected.
- Administrators will no longer be able to set the excludeFromMembershipCount property to true on users when creating a user via POST /user/users or updating a user via PUT /user/users/{id}/membershipupdate endpoints.
- Fixed an issue where field names with trailing spaces wouldn't get published in a Dashboard Data Set.
- Improved the performance of Point in Time reports so that they now load reliably.
- New formula labels will now be shown on Dashboard Data Sets.
- Fixed an issue where Workflow transitions could be saved with missing mandatory information (transition name, destination state).
- Fixed an issue where Workflow state, fields, and formula label changes were sometimes missed when syncing new values to Dashboard Data Sets.
- Fixed an issue where Data Sets would get stuck in a publishing state if the user published multiple Data Sets concurrently.
- Fixed an issue where Data Sets would fail to publish if their Object Types and data paths were created in immediate succession.
- Fixed an issue where Data Sets could fail to publish, but still show a successful publish message.
- Fixed an issue where some form types were missing the Assessment lock message while an Assessment launch was being processed.
- Fixed an issue where Assessment forms with hidden sections weren't rendering properly.
- Fixed a navigation issue after a user launched a rescope of an Assessment that had previously been created without any Objects scoped in.

- Data transformations can now use fields and formulas if their name has a trailing space, and successfully publish to their Dashboard.
- Queries have now been optimized to reduce the frequency of time-out errors moving forward.
- Fixed an issue where using the crop image button would result in a 500 error.
- Now, the upload file UI will always be displayed, whether or not the upload was successful.
- Formulas will treat empty values as null when an Object doesn't have a related Object.
- Fixed an issue where Administrators were unable to delete the assessment Object Type when there are no launched assessments.