Resolver.
A KROLL BUSINESS

Version 24.3 Internal Release Notes

Last Modified on 11/25/2024 3:40 pm EST

This article and its embedded links are for internal use only. External release notes are posted here.

24.3.0 Features

Playbooks Automation

Warning:
This feature is for internal use only. This feature is behind a feature flag and will be available for Production use in the 24.3.1 release. **Playbooks Automation** should not be enabled in Production until the 24.3.1 release. **Playbooks Automation** can be tested in Sandbox, but not for Production-bound configs.

Note:
Playbooks Automation is a paid feature. If a user is interested in enabling this feature on their Org, they should contact their CSM for further information.

The **Playbooks Automation** feature will allow users to automate playbooks and standard operating procedures (SOPs) within existing processes to efficiently run programs on their Orgs.

Playbooks Automation works through:

- **Task auto-generation**: Users will establish a comprehensive library of playbooks and SOPs in their Orgs and use this knowledge base to automate task-generation on an existing process.
- **Playbook auto-suggestion**: The feature also offers playbook suggestions, providing guidance to efficiently resolve the issue on hand.
- **Task templating**: Tasks are generated based on a task template from the Playbook Library that holds logic for due date calculations, task user assignments, work instructions, and default field values to help complete a task.
- **Configuration auto-generation**: To help users self-enable this feature, the platform will auto-generate most of the configuration required for implementing **Playbooks Automation** within an existing Org.

To begin using **Playbooks Automation**, users will need to configure the key components of the feature, including:

- The **Playbook Automation** rule
- A new **Run Playbook Automation** workflow action
- A new **Apply Playbook**s form action

Following this configuration, users will then need to set up content in the Playbook Library.

Augment AI Interaction Service

Warning:
This feature is for internal use only.

In order to support future AI features within Core, the AI Interaction Service has made the following improvements to support various handlers:

- Ensuring the service can support various external AI tools.
- Expanding the service to persist conversation state and conversation histories.
- Collecting and storing information from interactions with the external tools.
- Enhancing controllers that can support receiving and sending messages with AI tools.
- Enabling the service to pass object data from Core to the AI Tools as required.

Assessment Launch Update

Users can now launch concurrent assessments.

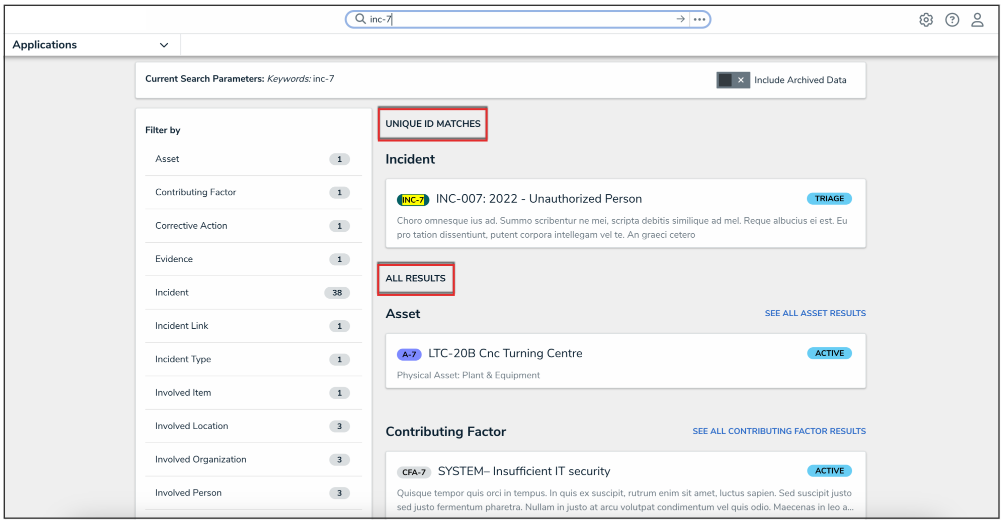
24.3.0 Minor Features

Search Returns an Exact Match for Unique ID

Note:
This feature will be rolled out after the communicated release date. It will be available any time between the communicated release date and December 16, 2024.

When users search for a unique ID and include the monogram (for example, INC-7) the search results will display an exact match for the unique ID at the top of the results under the **Unique ID Matches** section. All other results will be displayed under the **All Results** section.

If a unique ID match is returned in the search results, the **Unique ID Matches** and **All Results** sections will remain when clicking into the detailed view for the object type. Once a filter is applied to the search results, the separation between **Unique ID Matches** and **All Results** sections will no longer be displayed, and all the results will show as a single list.



Benefits:

- Users can now quickly find an exact match for a unique ID instead of searching through the large number of results returned.

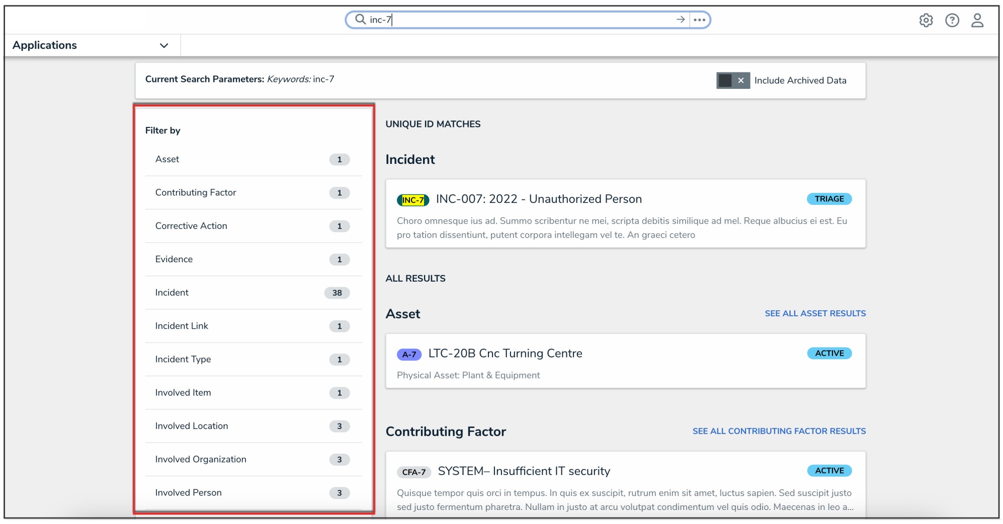
Supporting Documentation:

Please refer to the articles in the Search section for more information on searching for objects in Resolver.

Improved Navigation to Object Types From a Search

When users search in Resolver, a side panel will appear on the **Search Results** page that lists all of the object types that returned results for the search.

In the side panel, users can also see a total count of the number of returned results for each object type. Users can click the name of the object type in the side panel to navigate to the **Search Results** page for that specific object type.



Benefits:

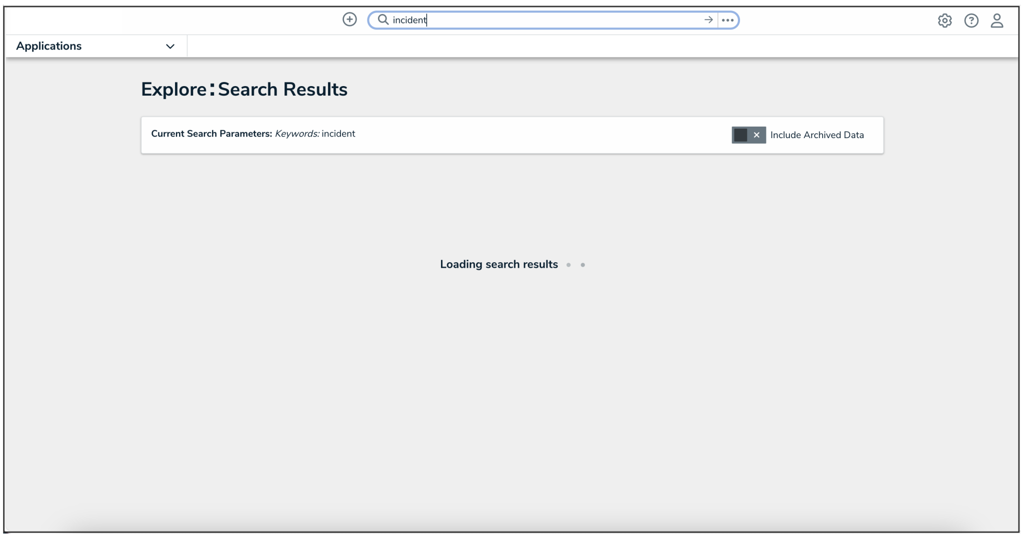
- Users can now quickly scan the returned search results for each object type in one view instead of scrolling through the large number of results returned.

Supporting Documentation:

Please refer to the articles in the Search section for more information on searching for objects in Resolver.

Search Progress and Error Indicator

While a search is in progress in Resolver, a progress/loading indicator will be displayed on the screen to communicate to users that the search is in progress. If there is an error in loading the results, an error message will be displayed instead.



Field Editor Updated

When opening a field from the **Fields** tab of an object or an assessment, the field details will now appear in a new palette for easier editing. When closing the editor, users will be navigated back to the **Fields** tab.

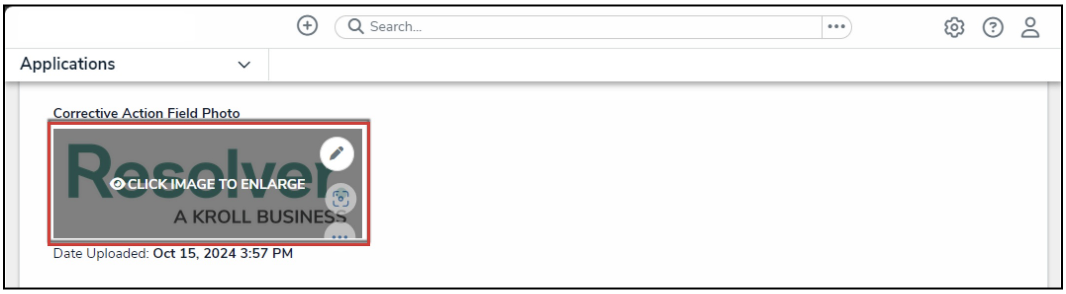
Additionally, when clicking the **Configure Value Concatenation** button from a field, the modal will now be centrally positioned on the screen.

Benefits:

- Users can now review and edit field details in a convenient way so that they don't have to spend unnecessary time navigating back to the **Fields** tab and searching for the field name in the list.

Enhanced Previewing Images Capabilities

When previewing images, users will now be able to enlarge the image in the preview mode before they download it. This feature is available for both image and attachment fields.



Benefits:

- Users can now preview and enlarge image attachments without having to first download them.

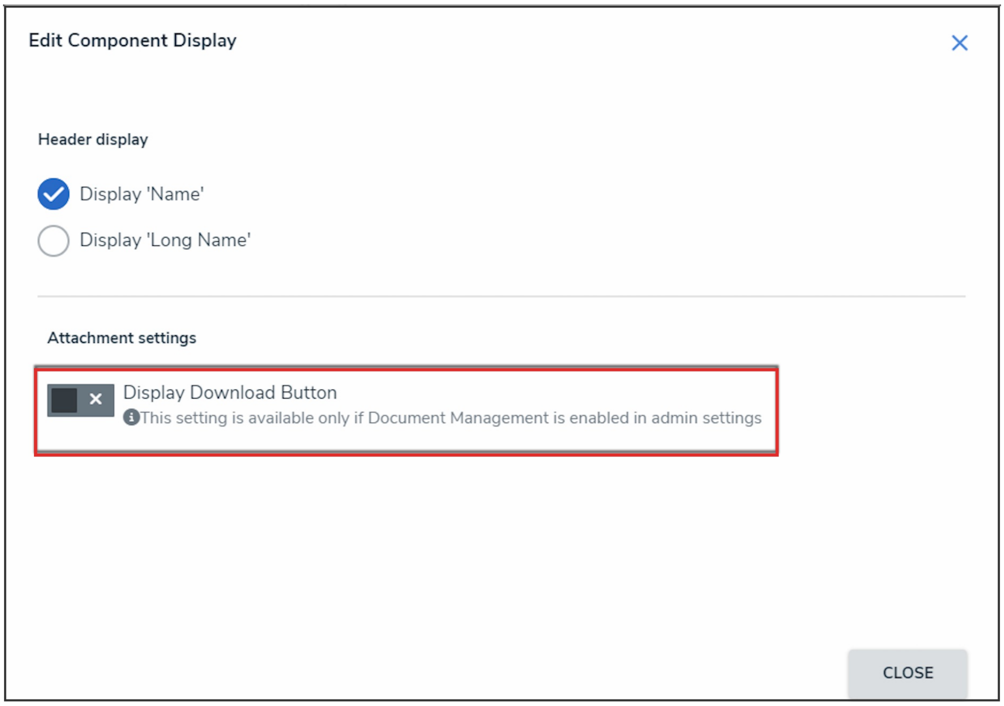
Important Notes:

- This feature is also available for read-only image fields.
- When previewing cropped images, the preview might not upsize/enlarge properly. This behavior will be addressed in an upcoming release.

New Display Download Button for Attachments

> ***Note:***
> This feature is only available for users that have **Document Management** enabled on their Org.

Administrators can now manage whether an attachment can be downloaded or not with a new **Display Download Button** toggle for attachment fields in a configuration form. When the **Display Download Button** toggle is turned off, the option to download the attachment will be disabled.



> ***Note:***
> The **Display Download Button** option doesn't apply to the download options for Microsoft Office files for Orgs that have Allow editing online via Microsoft Office enabled through **Document Management**.

Benefits:

- Administrators can now restrict a user's ability to download attachments to prevent unnecessary or unintentional download on to employees devices.

Important Notes:

- Users may not be able to open text files if the **Display Download Button** toggle is turned off.
- If the **Display Download Button** toggle is turned off, the ability to download the file can be restricted for a user regardless of their permissions or which user uploaded the file.
- If **Document Management** is disabled, the value for *displayDownload* property can't be changed via the API or in Swagger.
  - *PUT /object/form/{formId}/sections/{sectionId}/components/{id}* endpoint under formComponents service

Supporting Documentation:

Please refer to the Enabling the Display Download Button on Attachment Fields article for further information on displaying the download button on forms.

Confidential Portal Security Enhancements

> ***Note:***
> This feature is behind a feature flag. If you're interested in enabling this feature, please contact your CSM or the Services team.

We have introduced additional security for **Confidential Portal** users who need to protect themselves against potential bots and spam flooding their portal with submissions. In order to address these concerns, we've implemented rate limiting on the number of logins to the **Confidential Portal** and rate limiting on the number of submissions created during a session via the **Confidential Portal**.

Once the threshold of session log ins has been reached, further attempts to access the **Confidential Portal** will require users to complete a CAPTCHA. Once the threshold of submissions created has been reached, users will be required to log in again in order to create more.

The thresholds being introduced are as follows:

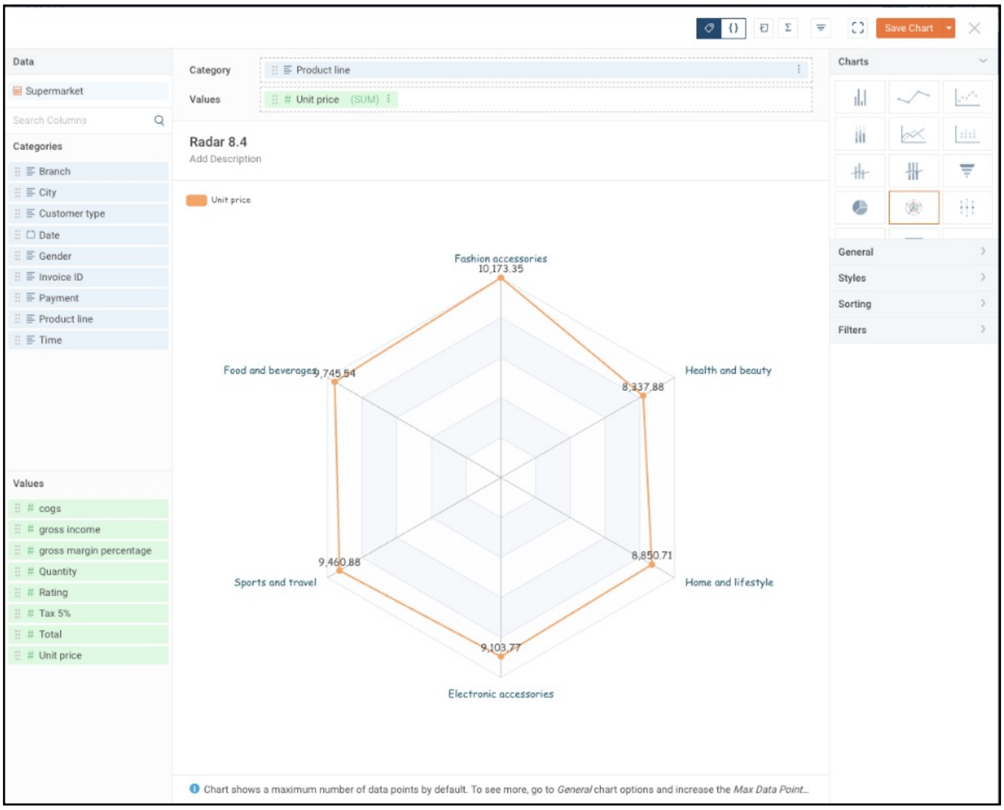
- On a per Org basis: all the Portal URL accesses in an Org, up to 30 sessions, may be started within in an hour time frame. Once this limit has been reached, further attempts to access the **Confidential Portal** will result in a CAPTCHA being displayed.
- On a per Org session: all the submissions created by the same user on the same browser, up to 30 submissions, may be created within an hour time frame. Once this limit has been reached, the user won't be able to create any further submissions and will be logged out of the system.

Benefits:

- Orgs can now enable additional security measures of monitoring submissions and requiring a CAPTCHA so that their data is secure from public threats.

Dashboards - Radar Chart

The Radar Chart is a new dashboard type which allows users to show object on a polygon grid, depicting category values as poles and the value column aggregates for each category are points on the poles. Points on the grid are connected with a line, creating a polygon. The horizontal axis represents likelihood, and the vertical axis represents impact severity. A radar chart helps visualize distribution and relationships, highlighting critical issues that need attention.



Radar Chart

Benefits:

- The Radar Chart displays visualize risk distribution and relationships, highlighting critical ones that need attention.

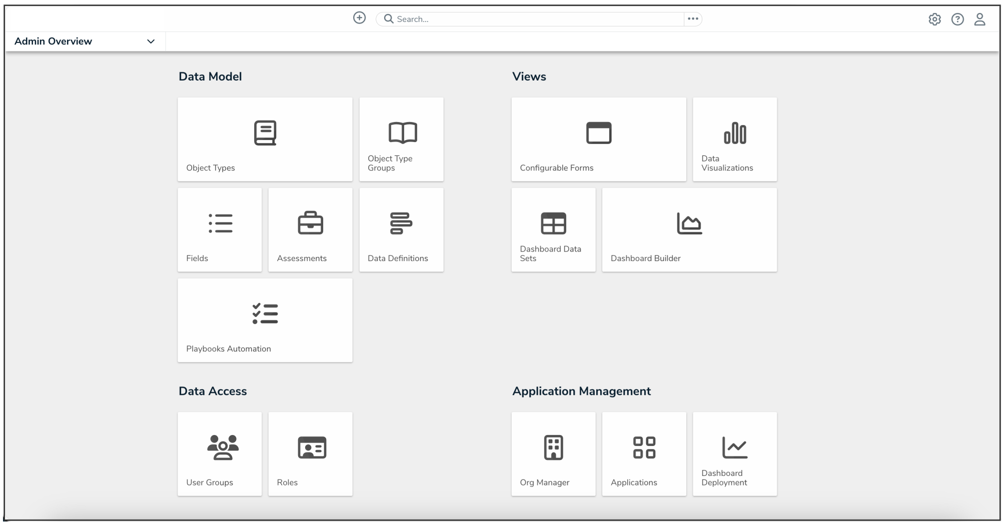
Supporting Documentation:

Please refer to the Adding a Radar Chart to a Dashboard article for further information on the Radar Chart.

UX Improvements

Updated Icons

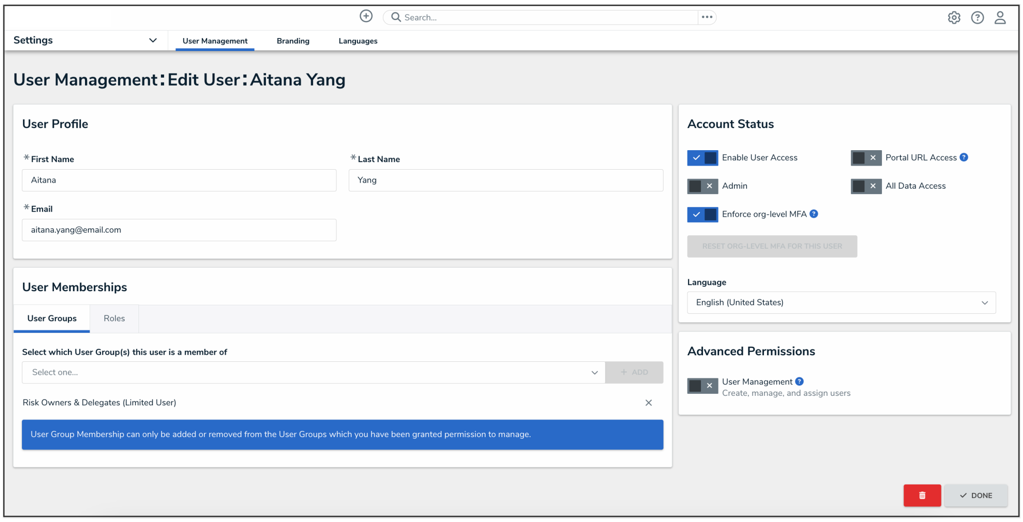
We have updated icons across the Resolver platform for a fresher look and better user experience.



Updated Create User and Edit User Screens

The ***Create User*** and ***Edit User*** screens have been updated to ensure that critical user management tasks are presented first and to minimize the number of clicks to reach the most useful tasks. The following changes can now be seen on the ***Create User*** and ***Edit User*** screens:

- The page layout has been changed so that the **Account Status**, **Advanced Permissions**, and **Data Warehouse Settings** section appear in the right sidebar.
- Portal URL access, user group, and role membership will now appear in tabs under a new **User Memberships** section.



Additionally, the **Change User Information** button will now only display on the User Profile card when the value in the First Name, Last Name, or Email field is changed.

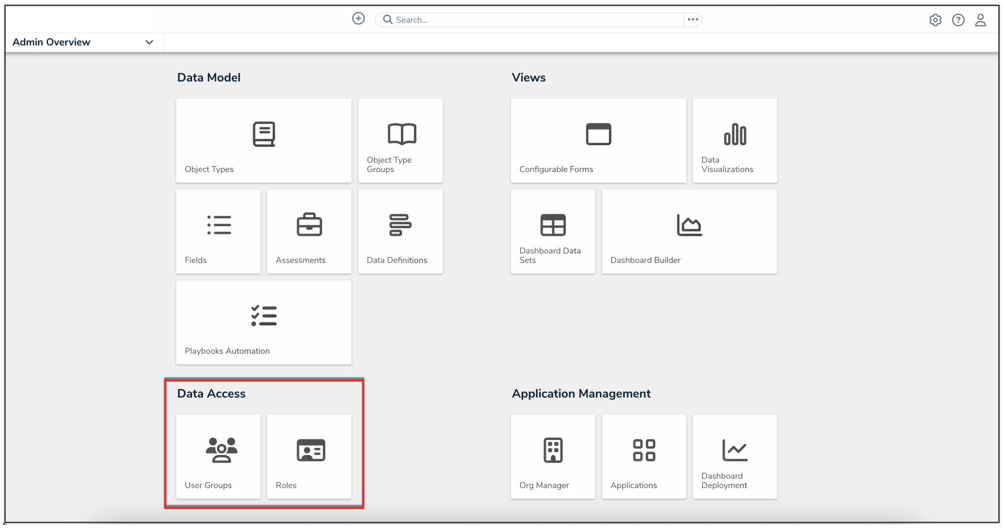
For Portal URL Access users, the **Enforce org-level MFA** toggle, and the **Reset org-level MFA for this User** and **Reset MFA for This User** buttons have been disabled on the ***Create User*** and ***Edit User*** screens.

Supporting Documentation:

Please refer to the articles in the User Management section for more information on creating and editing users.

Newly Named "Data Access" Section

In the ***Admin Overview*** screen, the People section has been renamed to the **Data Access** section.



Accessibility Improvements

- We've clarified labels on Audit Trail change entries to make them more accurate and helpful. The text now clearly identifies what the change was, helping users who might use tools such as screen readers.

- Descriptions can now be read at 200% zoom. On screens less than 768px wide, a single line description will still be visible. On screens more than 768px wide, object descriptions will show up to 3 lines before truncation.
- User Audit Trail filters, such as the email and date picker filters, can now be used at 200% zoom.
- We've improved assistive technology support for rich text formatting in Forms.
- Toggle switches in Assessments now have proper labels, supporting assistive technologies to provide more helpful guidance.
- Fixed an issue where emails that used tables for layout were difficult for assistive technologies. Now, the email template preview will use a more modern layout, which may result in slight deviations compared to the sent emails (which may still use tables for layout). This improvement will not impact the emails themselves.
- Email template configuration now has better labels in configuration (such as the subject line).
- Email template forms now have a descriptive header.
- When using dark mode, free form text hyperlinks now have improved contrast ratio.
- When using dark mode, the ***Looks like we've lost connection to Resolver*** error screen has improved contrast ratio.
- Fixed an issue with visibility of hidden text for charts in reports. Previously, this would trigger browsers and other assistive technology to identify the hidden text as something that might be important. Now, the hidden text is better hidden as to not interfere with assistive technology.

Improvements

- This improvement provides the ability for users to control how long the password reset token expiry is.
  - A new passwordResetExpiryMinutes property has been added for password reset expiry time at the Org level, with default expiry at 15 minutes, maximum at 30 minutes (changed from 48 hours), and the minimum at 2 minutes. Beyond this min-max range, values are not accepted.
  - For existing Orgs, the default value will be set through migration scripts.
  - During Org export and import, the target Org configuration will be retained.
  - When a user is associated with more than one Org, the reset password link expiration configuration will be from the Org with the most recent log in, active, and unlocked Org
- This improvement provides the ability for users to control how long the new user activation

token email expiry is.

  - A new userActivationExpiryMinutes property has been added for new user activation token expiry at the Org level, with default expiry at 30 minutes, maximum at 8 hours (changed from 48 hours), and the minimum at 2 minutes. Beyond this min-max range, values are not accepted.
  - For existing Orgs, the default value will be set through migration scripts.
  - During Org export and import, the target Org configuration will be retained.
- We have disabled autocomplete and field history on the Resolver login screen to ensure that autocomplete functionality doesn't accept or suggest the potentially dangerous input. The *autoComplete* attribute has been turned off on the following pages:
  - "Email address" and "Password" fields in the Resolver login screen
  - "Email address" field in the ***Change Password*** screen
  - "New password" field in the ***Reset Password*** screen
- Now, any active user sessions will be reliably destroyed when a user resets their password, is removed from an Org, or is deleted from the platform. This stops a user's ability to use Impersonation to ensure the secure access to the platform and Orgs, and to prevent session hijacking.
  - Any active user session will be destroyed when a user updates their password through **Change Password** or **Forgot Password**; this includes user (also MFA-configured user) active sessions in more than one Org.
  - Impersonation gets terminated when a password gets updated.
  - There will be no impact on user sessions related to **Confidential Portal** logins.

New Content Translations

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

Release 24.3.0 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.

Bug Fixes

- Fixed an issue where the assessment service was inadvertently picking up a Data Import job, preventing them from being picked up by the Data Import service and marking them as errored.

- Previously, Advanced Permissions users would get a 403 Unauthorized error when accessing any user group page while the *newAppDeploy* feature was enabled. Now, Advanced Permissions users will have access to the User Group page when the *newAppDeploy* feature is enabled.
- Now, new app exports will generate the correct warnings if role permissions, role triggers, and role memberships aren't tagged correctly.
- Fixed an issue where DWH Proxy validation errors provided too much information to users. Now, generic error messages will be returned if validations fail when the IP address is not whitelisted.
- Advanced Permissions users can no longer create new users with/update existing users to have SSO Bypass, update existing users to have the User Management Advanced Permission, or deactivate org-enforced MFA for existing users for via the *POST - /user/users* and *PUT - /users/users* APIs. This behaviour was already restricted via the UI.
- Advanced Permissions users can no longer create other Advanced Permission users via the *POST - /user/users* API. This behaviour was already restricted via the UI.
- The business logic to clear the user groups and roles a User Management Advanced Permission has permission to manage, when their advanced permission is deactivated, has been moved to User service.
- Fixed an issue where cancelled nightly worker tasks caused the entire process to hang around for a day. Now, nightly triggers will not continue to wait when all instances are done processing.
- Fixed an issue where scheduled trigger did not log errors if processing ends at the step function. Stale trigger alarms will occur on the same day as a stale trigger is created.
- Implemented some internal design system changes for email templates not loading.
- Fixed an issue where rich field texts in PDFs weren't exporting in different font sizes. Now, font sizes are consistent.
- Fixed an issue where nested bullet points in a dropdown menu weren't properly displayed. Now, the **User Management** menu option will appear with a nested bullet point for Advanced Permissions users.
- Implemented a number of incremental accessibility improvements.
- Fixed an issue where searching for keywords with '&' or '&&' in between keywords only searched for keywords before '&' or '&&' in global searches. Now, searches will process search terms with '&' in the search text.
- Fixed an issue where Resolver switched to dark mode when entering Impersonation mode, despite the system settings. Now, preference will now be maintained when entering Impersonation mode.
- Resolved an issue where timestamps weren't being included for date & time fields in Dashboards.

- Fixed an issue where Activity view searches weren't displaying expected results. Now, users should be able to find the object when searching Activity view.
- Fixed an issue where the Idea Portal submission wasn't auto-populating the user email. Now, the new portal’s private key enables the email to be auto-populated.
- Resolved an issue where, after a formula deletion returned a Redis error, it couldn't redeploy. Now, redeployment will not fail after formula deletion and post Process run.
- Fixed an issue where the Welcome email wasn't being sent to all users when SSO was enabled.
- Fixed an issue in **Document Management** where selecting a previous version of a PDF file automatically downloaded it. Now, users can preview the PDF in a new browser tab. We've also updated the Version History information statement to "Select a version to open in preview." This solution is applied when **Allow editing online via Microsoft Office** is enabled or disabled.
- Resolved an issue where users with a high volume of fields that exceeds expected thresholds were unable to search for objects.

> ***Note:***
> For a complete list of bug fixes for Version 24.3.0, download the Release Notes 24.3.0 file from Box.