Release 25.1.0

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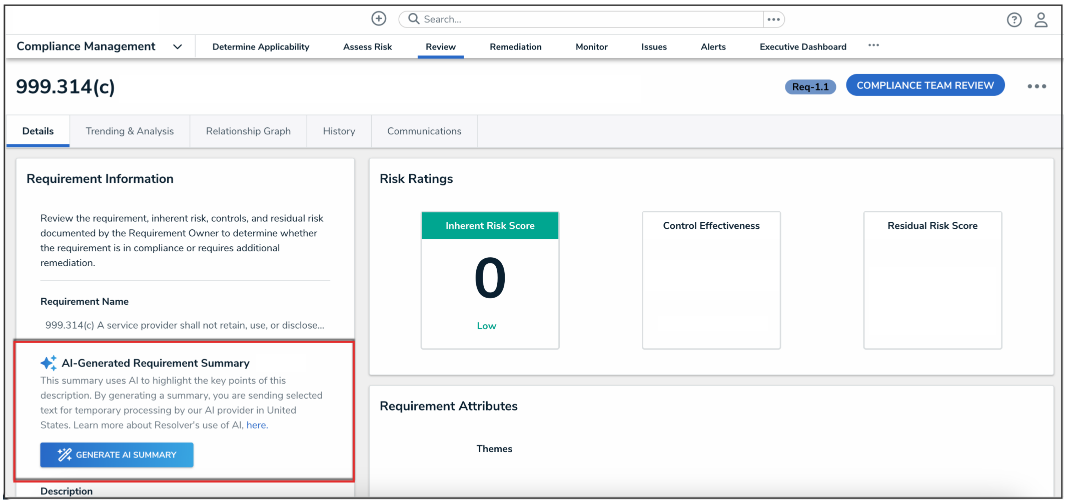
25.1.0 Features

AI-Generated Requirement Summary Feature

Note:
Please contact your CSM if you're interested in enabling this feature.

The AI-generated requirement summary feature uses AI/ML to summarize regulation statements, making them easier for users to interpret and understand.

When you add this feature to a form, users can click the **Generate AI Summary** button to produce a simplified requirement summary.



Benefits:

- The AI-generated requirement summary feature will aid the Compliance Management team with comprehending new and changing regulatory statements.

Supporting Documentation:

Please refer to the following articles for further information on using the AI-generated requirement summary feature:

- Enabling the AI-Generated Requirement Summary Feature on Forms
- Review a Requirement
- Perform an Applicability Assessment

Activity View Search Improvements

The following improvements have been made to the way users can search in the Activity View:

- Users can search by unique ID, with or without the monogram.
- To search, type in at least 3 characters; this limit does not apply to searching for unique IDs.
- Searching with double quotes will return exact matches alone.
- Search results will be returned from the object name, object description, or any text field and there will be a count of the total results found.
- Search results will be ranked based on the exactness of the match between the keywords and object name, description, or field value and the location of the result.
    - Search results with an exact match mean that all keywords, in the order they were written, are found in the object name, description, or text field value and there are no other values in the object name, description, or text field value.
    - Search results with a partial match mean that one or more keywords, in any order written, are found in the object name, description, or text field value. There may or may not be other values in the object name, description, or text field value.
    - Search results with a fuzzy match mean that the keyword is similar to the object name, description or text field value. Fuzzy matches will depend on the character length of the keyword, per the following:
        - Keywords with 1-2 characters return exact matches only
        - Keywords with 3-5 characters return matches with variation in 1 character (for example, searching for **Bill** will also return **Bil**)
        - Keywords with more than 5 characters return matches with variation in 2 character (for example, searching for **aprovel** will also return **approval**)
- Search results have the following ranking:
    - Matches for unique IDs
    - Exact matches to the object name
    - Exact matches to the object description
    - Exact matches to text field values
    - Partial matches to the object name
    - Partial matches to the object description
    - Partial matches to text field values
    - Fuzzy matches to the object name
    - Fuzzy matches to the object description
    - Fuzzy matches to text field values

Supporting Documentation:

Please refer to the Searching Activity Views article for further information on searching activity views.

Data Warehouse Sync Improvements

We’ve implemented the following solutions to improve how objects sync between Resolver and the Data Warehouse:

- Fixed the issue where some objects and relationships were not getting synced properly between Resolver and the Data Warehouse.
- Built a script that reports on any discrepancies and fixes any new sync issues. This is run monthly.

Added a New Language: Afrikaans

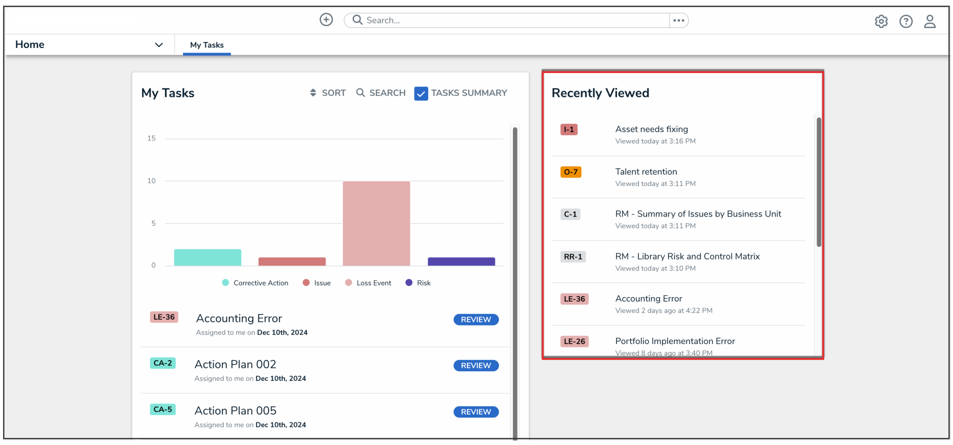
Afrikaans is now available in Resolver for selection in the language drop-down, and translations for the language will now be accepted.

UX Improvements

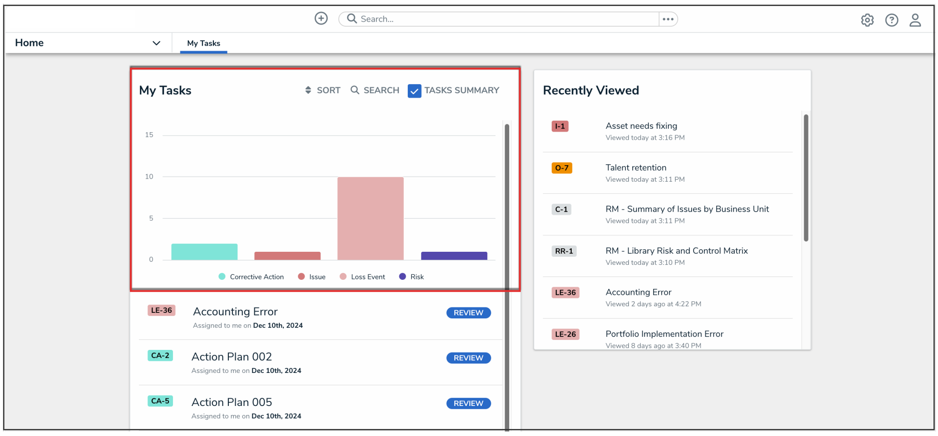
Home Page Updates

We’ve made the following improvements to the ***Home*** page in Resolver to allow users to quickly return to data that they recently worked on without having to spend time searching for it again:

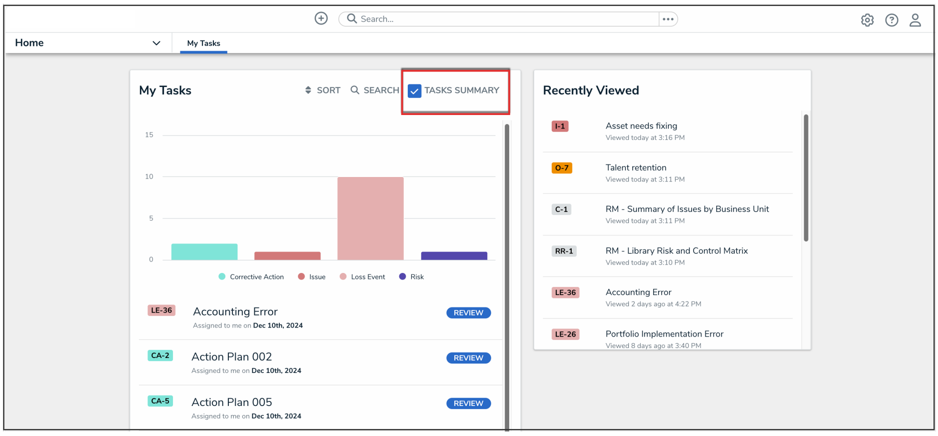
- **Recently Viewed** widget
  - A widget on the ***Home*** page that lists the last 10 items a user viewed in the past 30 days, sorted by recency
  - Users can see the day and time the item was last viewed



- **My Tasks** filters update
  - The previous **My Tasks** filter charts have been consolidated into a single chart within the **My Tasks** card, providing a simpler summary view and saving space on the ***Home*** page



- There is now a **Tasks Summary** toggle at the top of **My Tasks** card which shows and/or hides the chart. This toggle selection will persist across sessions within the same device



Supporting Documentation:

Please refer to the following articles for further information on these ***Home*** page updates:

- User Interface
- My Tasks

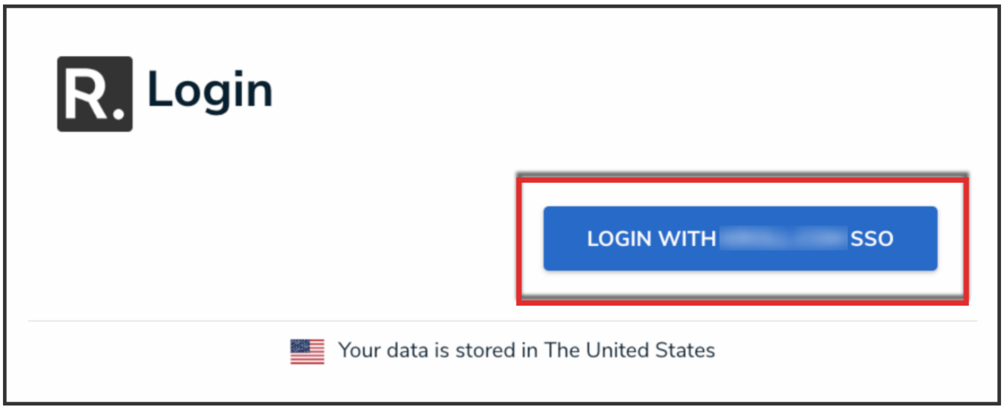
Form Conflict Message Update

We've updated the message that is displayed when a form conflict occurs in Resolver. Now, the message will be as follows:

- For a form conflict: *"Alternate forms are available. If the impersonated user is not seeing the expected form, modify priority settings in the form builder."*
- For a form on a palette: *"Alternate palette forms are available. If the impersonated user is not seeing the expected form, modify priority settings in the form builder."*

SSO Login Improvements

Logging into Resolver with the following syntax added to the URL `?domain=<CustomerDomain.com>` will present users with a one-click login, and skips the need to provide an email address.



Supporting Documentation:

Please refer to the following articles for further information on the SSO login improvements:

- Log In with SSO
- Single Sign-On (SSO) Frequently Asked Questions

Improvements

- N-depth and nested formulas will now consistently recalculate after workflow transitions are completed
- Empty values have been removed from the language translation file and it has been compressed, thus reducing the file size for the user.
- We've optimized report loading performance and increased the maximum load time to 5 minutes.

Bug Fixes

- Fixed an issue where objects did not consistently open from heat maps.
- Fixed an issue where standard users could access the Idea Portal page through the URL.
- Users will now receive an error message if a variable isn't successfully added or removed from a formula.
- Resolved an issue where a specific component in PIT reporting was converting modified/created fields to UTC, expecting date but receiving string causing an error.
- Improved the performance of the Bulk Assessment Launch feature.
- Resolved an issue where formula updates were not being processed in Data Audit Trail and Object History.
- Resolved an issue where the **In Progress** banner wasn't being replaced when a bulk assessment launch had successfully launched the assessment.
- Users can now use special characters in assessment names for bulk assessment launches.

- Resolved an issue where the multiple assessments tab was going blank intermittently due to a falsely labeled required component.
- Resolved an issue where the ***Recent Assessment Launch*** history screen was not properly filtering out bulk assessment launches older than 30 days or over 10 files.
- Resolved an issue where BI connector could not be turned off after being enabled.
- Resolved a UI issue where toggling between single and multiple assessment launch would render a blank screen on the single assessment launch form.
- Resolved an issue where the *maxDataset* value was throwing the wrong error if a user set the limit above the maximum of 50.
- Resolved an issue where the data transformation was throwing the wrong error when an invalid input was entered.
- Translation support added for free form text fields in PDF export for reports.
- Fixed language translation support for the **Modified On** date property field.
- Updated the file upload size limit from 5000000 bytes to 5242880 bytes to provide better support for translation file uploads up to 5 MB.
- Provided performance enhancements for reference object creation and linking on assessments.
- Provided fixes for configuration updates to email templates not being picked up consistently.
- Fixed header style text overlap on report tables in data visualization (reports) PDF exports.
- Provided fixes on formula auto-calculation when the **Pull Data Values** workflow action was used in a transition. When related/referenced objects were pulled in, the formulas were not being recalculated and users needed to manually click the **Recalculate** button for the result to update.
- Fixed user permission requirements to be able to re-assign users in bulk.
- Fixed bulk user reassignment to process successfully when the current assignee is assigned to multiple user groups that are assigned to the role.
- Fixed results on date values provided by the **Set Field Values** workflow action, when configured on the **Creation** state. The **Set Current Date** function now returns results to set dates in local time and not UTC.
- Long workflow states will no longer wrap in search results.
- Autofilling name/email/phone number from Edge Wallet now works properly.
- Fixed an interaction problem with name and description text for a workflow trigger.
- Formula cards within collapsible sections no longer bleed outside their box.
- Fixed typographic errors in the heat map configuration screen.
- Updated styling such that data grid header popovers do not appear behind the header text.
- Fixed a layout issue when users have names less than 10 characters.
- Fixed an issue that caused text to be compacted where there were more actions than could

be displayed.

- Made an accessibility improvement where read-only drop-downs are no longer usable via keyboard.
- Responding to two way communication will no longer attach an EML file, if the object was submitted via the Portal and flagged as confidential.

New Content Translations

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

Release 25.1 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.