

Release 25.1.2

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25.1.2 Features

Templated Reports



Note:

Currently, this feature supports limited data volume on exports. Please contact your CSM or Kroll practitioner if you're interested in enabling this feature.

Introducing **Templated Reports**, a powerful new export option that enables Orgs to generate highly customized Microsoft Word documents directly from their report data—no manual formatting required.

With **Templated Reports**, Administrators can upload a `.docx` Word template to a report's configuration and define data placeholders that will be automatically populated at export time—just like mail merge, but tailored to an Org's data structure in Resolver.

Key Capabilities:

- **Word template upload:** Administrators can upload a `.docx` file (up to 20MB) as a template for exporting report data.
- **Placeholder mapping:** Use squiggly-bracket syntax (`{variableName}`) to insert data placeholders in the template.
- **Repeatable sections:** Dynamically repeat sections in the template using `{ #collectionName } ... { /collectionName }` syntax.
- **Data series mapping:** Map variables from one or more data series to your template placeholders, including fields, properties, workflow states, and more.
- **Validation tools:** Ensure all placeholders and variables are correctly and uniquely mapped before generating the export.
- **Export experience:** Users can now choose between a standard Word export and a Templated Report export (if configured).

Benefits:

- Match corporate branding requirements on exported reports
- Reduce manual formatting efforts on Word exports
- Generate polished executive-ready or regulatory reports using customizable templates powered by Resolver data
- Simplify third-party collaboration by exporting professional, data-rich reports directly from Resolver to external parties like insurance assessors and valuation consultants with minimal

manual effort

Supporting Documentation:

Please refer to the [Templated Reports](#) section for further information on using Templated Reports in Resolver.

Default Sorting for Reports

We've introduced a new default sorting ability to tables in reports to help users streamline how they view and interact with data. The default sorting can be set using any sortable column, including Properties, All Field types, Formulas (Numeric, Date), Workflow states, Relationships, References, Roles.

This ability is supported for both report tables and data grid reports.

Benefits:

- Allows Administrators to define a custom sort order for any report table, ensuring reports reflect custom team prioritization business rules right out of the box — no more manual re-sorting every time a report is opened.

Supporting Documentation:

Please refer to the [Add a Table to a Report](#) article for further information on default sorting for reports.

Pull Data Value Variations

The **Pull Data Values** workflow action now supports two variations which Administrators can select from a drop-down menu when configuring the workflow action:

1. **Last created** (default): Pulls data in from the last created related data
2. **All**: Pulls data in from all related data

These variations are supported for manual buttons and orchestration events on workflow transitions.



Note:

All existing configuration will be defaulted to the **Last created** variation on launch (current system behaviour).

Benefits:

- The **All** variation now provides users with a complete and consistent view of all relevant information without manually linking each object.

Limitations:

- Timed transitions (Scheduled, Nightly) will only support the **Last created** variation.
- Data pulling is limited to a maximum of 100 objects per transition.

Supporting Documentation:

Please refer to the [Add a Pull Data Values Action to a Transition](#) article for further information on pull data value variations.

New Advanced Permission: Data Import Management

We've added a new **Data Import Management** advanced permission that allows non-Administrator users to have isolated access to the below features in the ***Admin Overview*** screen:

- Data Import
- Reassign Data

Benefits:

- Users with restricted permissions can import and reassign data without needing Administrator permissions.

Supporting Documentation:

Please refer to the following articles for further information on the new **Data Import Management** advanced permission:

- [Advanced Permission Types](#)
- [Assigning Advanced Permissions to a User](#)
- [Edit a User](#)
- [Creating a User List](#)

Showing Only Relevant Portal URL Information

Certain controls will now be unavailable on the Portal URL so that only the most relevant information is visible to the user.

If the Portal URL type is **Form**, the following will not be available on the Portal URL:

- The User Profile icon in the header
- The Applications menu and nav bar
- The logo will not be clickable

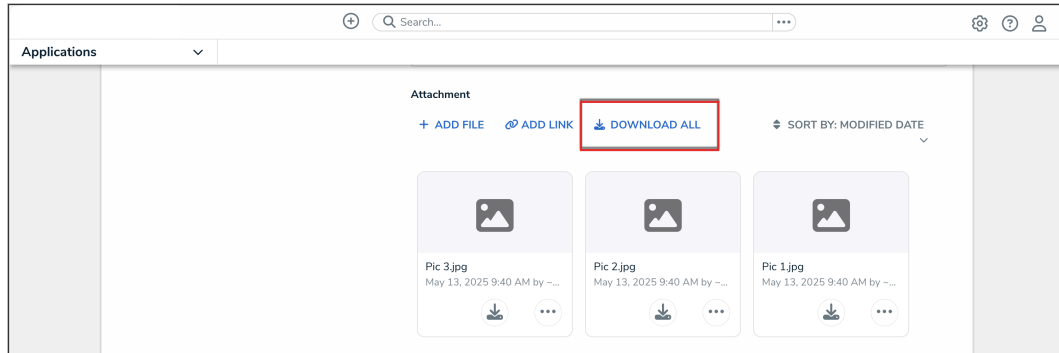
If the Portal URL type is **Activity**, the following will not be available on the Portal URL:

- The User Profile icon in the header

Download All Attachments

The new download all attachments feature improves the existing attachment field download functionality by giving users the ability to download all of the files from an attachment field to a .zip file with the single click of a button.

A new **Download All** button will now show on attachment fields when downloading is enabled for the field.



After clicking the **Download All** button, a banner will indicate that the .zip file is being prepared. This process may take a few minutes to complete. When the .zip file is ready, it will be automatically downloaded by the browser.



Note:

Downloaded attachments are limited to a total file size of 1GB across all files on the field. If all of the files on the field total more than 1GB, the user will receive an error and will need to download the files individually.

Benefits:

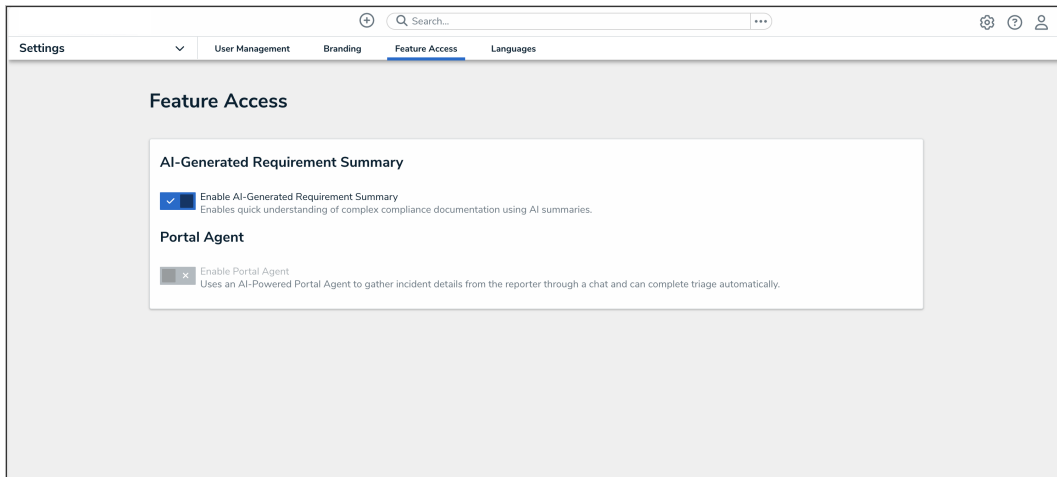
- Users can now download all the files on an attachment field with one click, saving them time from downloading each file individually.

Supporting Documentation:

Please refer to the [Downloading an Attachment File](#) article for further information on downloading all attachment files.

New Feature Access Screen

We've added a new **Feature Access** screen to the **Administrator Settings** menu. From this screen, Administrators and Settings Management advanced permission users can self-enable certain features in Resolver.

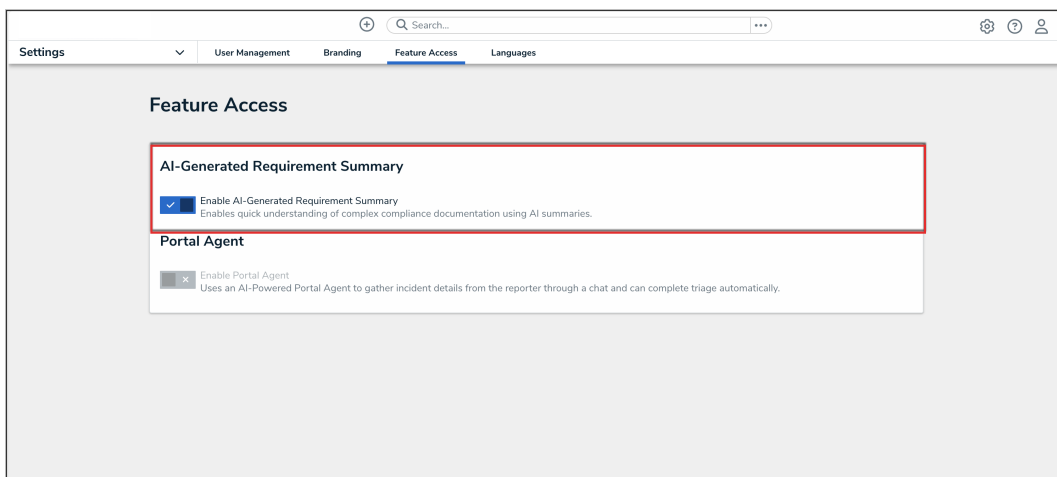


Supporting Documentation:

Please refer to the [Feature Access Overview](#) article for further information on the new **Feature Access** screen.

Self-Enabling the AI-Generated Requirement Summary Feature

Administrators and Settings Management advanced permission users can now self-enable the AI-Generated Requirement Summary feature for their Org from the **Feature Access** screen. Once the **Enable AI-Generated Requirement Summary** toggle is turned on, users will be prompted to accept the relevant disclaimer for using the feature.



Supporting Documentation:

Please refer to the [Enabling the AI-Generated Requirement Summary Feature On an Org](#) article for further information on self-enabling the AI-Generated Requirement Summary feature.

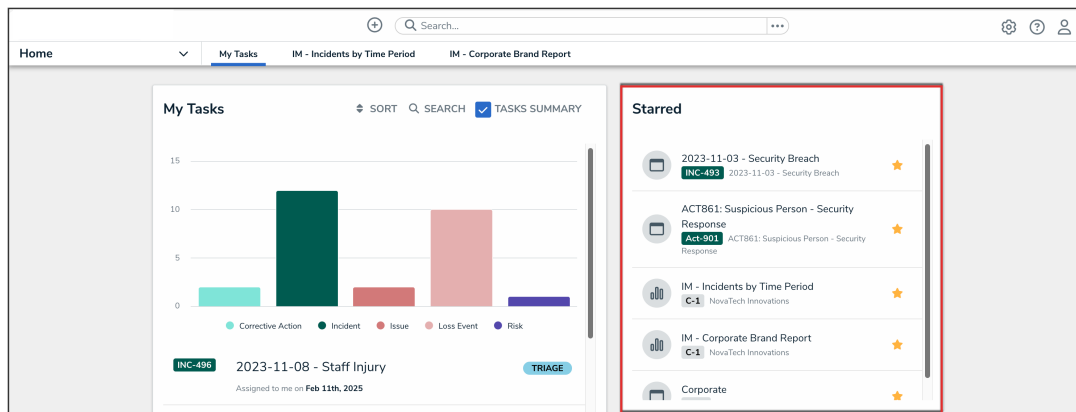
AI-Generated Requirement Summary Feature - AI model Switch

The AI model powering the AI-Generated Requirement Summary feature has been updated to use Claude 3.5 Sonnet by Anthropic following the planned deprecation of the previous AI model.

UX Improvements

Improvements to Starred and Pinned Items on the Home Screen

The new **Starred** widget on the **Home** screen allows users to star objects, dashboards, and reports, providing a scalable way to view all starred content in one place with added context for each item.



We've also expanded the pinning feature to allow users to pin objects and dashboards, in addition to reports, to the **Home** screen for quick access.



Note:

All previously starred reports will be automatically pinned by default so users retain their familiar access pattern.

Limitations:

- Users can pin a maximum of five items to the **Home** screen.
- All starred reports are currently pinned by default and cannot be unpinned. This will be resolved in a future release.

Supporting Documentation:

Please refer to the following articles for further information on the new starring and pinning items experience:

- [User Interface](#)
- [Starring Items on the Home Screen](#)
- [Pinning Items on the Home Screen](#)

Improvements

- The **Reassign Data** feature has been moved from the **User Management** screen to the **Tools** section on the **Admin Overview** screen.

Bug Fixes

- Fixed race conditions that caused Orchestration events to not succeed in some scenarios.
- Fixed issues with the Workato integration saving signed PDF files with incorrect file headers, which resulted in corrupted files downloads.
- Fixed a pagination issue on the endpoint `/data/object/{objectId}/relationships/deepfor` retrieving relationships.
- The user that closes the dispatch will now be reflected as the **Performed By** user in the Data Audit Trail event.
- Fixed extra spaces around the French apostrophe on PDF exports.
- Fixed issues with data not appearing on some form tables unless first clicked.
- Relationship tables now support long lists while maintaining an increased level of accessibility.
- Page titles now have the correct font size.
- Fixed missing translation support on the **Recently Viewed** widget.

New Content Translations

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

[Release 25.1.2 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.