

CORESTREAM

# CoreStream Platform v2.0 Release Notes

1<sup>st</sup> October, 2022



## Document Purpose

This document provides a summary of the highlights of the *CoreStream 2.0 release*. Major Platform releases are finalised every 2-3 months depending on client and strategic priorities. These *release notes are part of* CoreStream’s approach to keeping clients and partners informed of the improvements we are delivering.

This document summarises the key user stories and issue fixes, categorised in the following ways, and specifies whether the change is available automatically as part of the upgrade, or requires a configuration change.

<b>Strategic Features</b>	The introduction of new Platform features considered to be of strategic importance.
<b>Core Features</b>	Improvements to existing features or new functionality that is more limited in scope than the strategic features.
<b>Configuration Improvements</b>	Changes relating to improvements to our approach to configuration, focused on improving the efficiency, accuracy, and consistency of Platform configuration.
<b>Issue Fixing</b>	The resolution of Platform issues.
<b>Integrations</b>	External applications or systems that CoreStream has integrated with.
<b>Technical</b>	Improvements to the technical Platform elements. These improvements are typically non-functional.

Please note that each category will not feature in every release update and some may be more heavily weighted towards certain categories. As always, the plan is to focus on those items that add the most value to our clients.

## Platform Director Overview

The CoreStream team would claim that I say this about every release, but the level of excitement we all have about our 2.0 release is unmatched. It had to be significant to be worthy of the 2.0 label, and really is a step change.

We have introduced a new approach to Policy Management, providing a modern 'web site like' feel for those accessing policy and related content. Artificial Intelligence is now firmly embedded in the Platform, to help our clients evaluate their control definitions. We have continued the journey towards providing insightful and unique insight through introducing our new risk visualisation, and now offer admin user configurable dashboards (via the interface) and a fully featured configuration interface for clients! As if that wasn't enough, we have also integrated with our sister company – VinciWorks – to provide a fully integrated eLearning capability!

In addition to these incredible features, we have integrated with a number of third-party systems and data sources and progressed towards making these achievable via menu driven configuration, automating the common threads in what is typically a deeply technical exercise.

As always, please do reach out to your primary CoreStream contact if you would like to discuss any of these features in detail or understand how they could be made available to you.

On to the next one....

Rich

# Release Notes

## Strategic Features

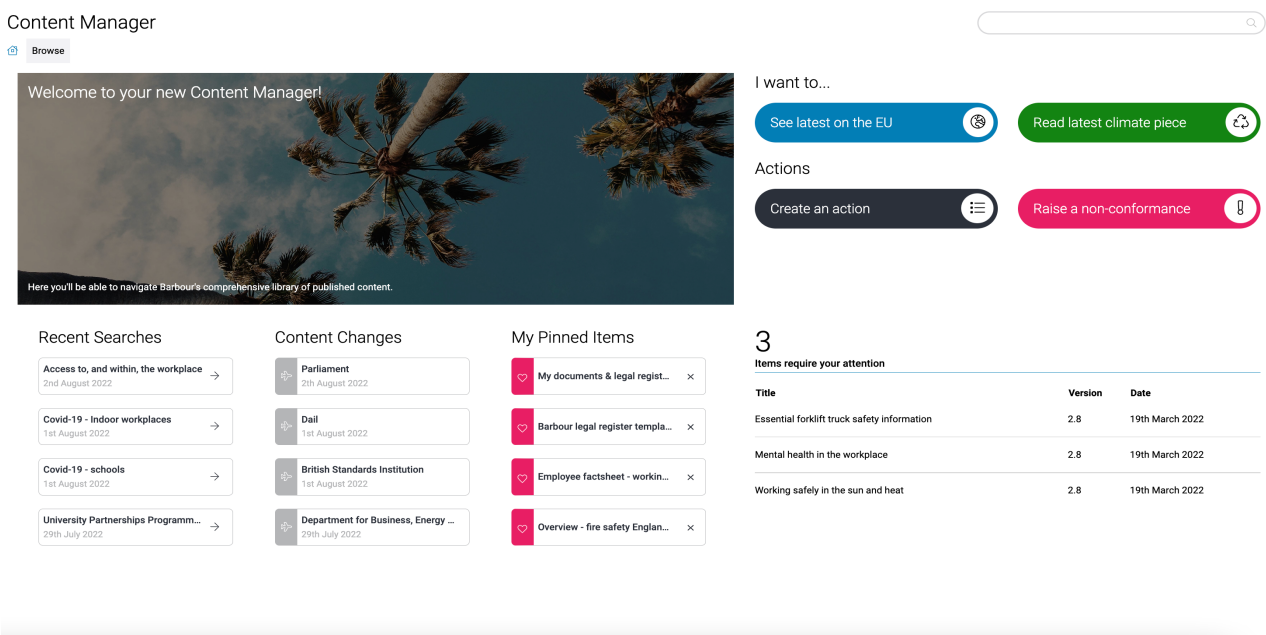
### New Policy Management portal

*Configuration Required*

CoreStream is proud to present a new interface for the filtering, searching and consumption of policy (and related) content. As with all CoreStream features, it has been designed to be flexible to support our clients' differing approaches to policy management. Our demonstration environment supports a structure of Policy, Policy Standard and Procedure, but these levels can be substituted or removed entirely, based on client requirements.

The interface looks to provide a more 'web site' type feel for users to locate and consume policy content. The content can be served to end users based on job role and includes the ability to push content to users to read the latest versions upon publication. This sits on top of the existing CoreStream approaches to policy governance. It can also be configured to show the latest published versions of content, facilitating the review and approval of content without impacting existing versions being consumed by the business.

The interface has been designed to be intuitive and efficient - serving content based on what has recently changed, what users are regularly searching for, and suggesting actions based on the content being viewed at any point in time.



## Configuration Interface for Clients

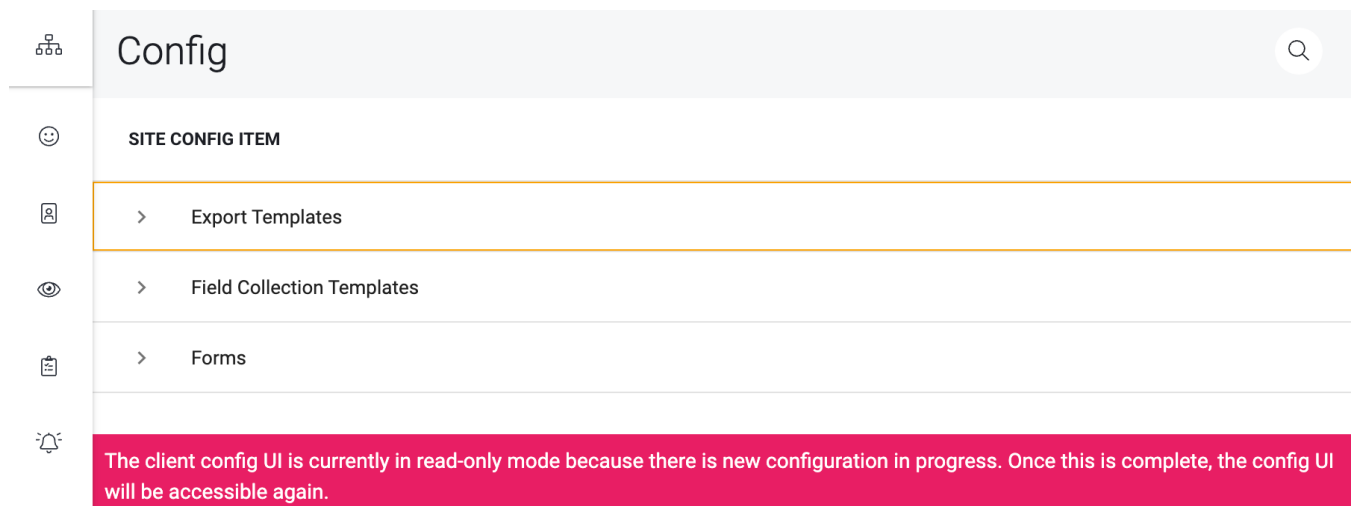
### Configuration Required

The CoreStream Platform utilises a menu driven interface to manage the configuration of a particular platform instance. This includes all forms of configuration from creating new database tables and columns to utilising those in grids, forms and reporting outputs. This extends to data exports and email alerts.

For the first time in our history we have a version of this interface that can be made available to clients where there is a desire to make platform changes in house by suitably trained resource. Where this facility is utilised, it can be temporarily disabled if there is an active project in progress where fundamental changes may be being made.

The options available via the interface are also configurable, meaning that the areas of configuration available could be restricted to allow changes to exports and emails but not structural elements of a given site.

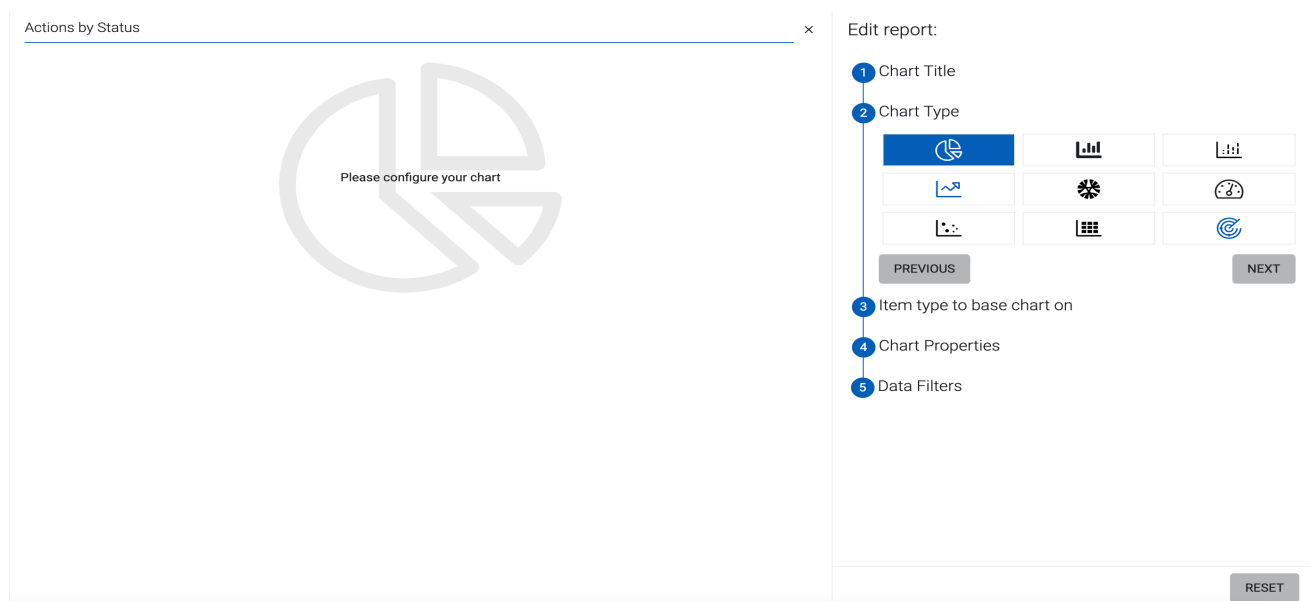
To discuss making use of the configuration interface, please contact your CoreStream representative to discuss training packages.



## Admin user configurable reporting dashboards for client administrators

*Configuration Required*

The CoreStream Platform now provides the facility for client administrators to configure our dashboards. As with all CoreStream features, we have worked to make this process as intuitive as it possibly can be, utilising a wizard to make the necessary selections, and making use of intelligent defaulting to remove some of the more granular elements of chart configuration. The initial coverage is focused on our core chart types but the intention is to make all available in subsequent releases - including some of our custom visualisations!



## Online training capability via integration with VinciWorks

*Configuration Required*

CoreStream has joined forces with our sister company, VinciWorks, to provide an online training capability.

The feature has been integrated with all core CoreStream features, meaning that mandatory training can be monitored via CoreStream tasks with a seamless integration to launch and complete online training courses. The training is also integrated with our new Policy Manager interface to prompt users to complete relevant training. Work has also already begun to make training suggestions based on user activity!

Once users complete training, the status of the corresponding task in CoreStream is updated and their score is logged. This training management information can then be used alongside other CoreStream content, providing integrated, useful insight across areas of risk and compliance.

Training is available off the shelf (full catalogue is available at <https://vinciworks.com/courses/>), tailored or entirely bespoke. Please speak to your CoreStream representative to discuss any specific training requirements.

### What would you do?

Jeometrix was a successful content business centred around its website, which is built on a very old platform. The site's technology hadn't kept up with the pace of the Internet, and many in the company feel that it needs to migrate to a brand new system. On the one hand, failing to launch a new site means that the company would be unable to grow in the future. On the other hand, building a new site would be a long and expensive process that also comes with significant risks, and the site is making good money now. Some in management say there is no choice but to invest in a new system for the future, while others fear that the implementation could ruin the company now.

#### What approach would you take?

Put everything we have into building a new website, despite the risks and difficulties

Stick with the website we currently have, and hope for the best

**It depends how much risk the company can handle** ✓

#### *That's right!*

There is no right answer here. Each path forward has its own set of risks and rewards. The ultimate decision depends on the company's risk appetite and a variety of factors that each manager will weigh differently.

## **DataStream part 1: The ability to bulk mirror/remove or replace user assignment of content**

### *Configuration Required*

CoreStream is proud to introduce DataStream which will help our clients perform manual data exercises in an efficient and effective way. The first of these is now available and supports client admin users in modifying user permissions in bulk.

The interface allows an admin to search for a user across all CoreStream collections and then decide to modify their permissions for an entire collection, or for specific roles within those collections. This allows a user to have their assignment of content removed, have it mirrored

(where someone needs to be named on the same content as another user) and/or have it reassigned to another user.

DataStream will go beyond this in upcoming releases, helping our clients manage other data tasks such as reorgs and the movement of risk registers and other content.

Select user

Alka Kumar (Alka.Kumar@corestream.co.uk) v

RESET

In these places

Risks x Actions x x v

SEARCH

⚠ Some user fields require that users are in specific groups. Please ensure you have checked user group permissions before populating them as a 'new user'.

PLACE	OCCURRENCES	ACTION	NEW USER	STATUS
> Risks	0	Choose <span style="float: right;">v</span>	Choose <span style="float: right;">v</span>	
▼ Actions	100	Choose <span style="float: right;">v</span>	Choose <span style="float: right;">v</span>	

PLACE	OCCURRENCES	ACTION	NEW USER	STATUS
Owner	0	Replace user with new value <span style="float: right;">^</span>	Cam McNair (Cam.McNair@cor <span style="float: right;">x</span>	
Action Approvers	0	Replace user with new value <span style="float: right;">(Selected)</span>	Choose <span style="float: right;">v</span>	
Assignee	0	Remove user	Choose <span style="float: right;">v</span>	
Delegates	100	Append new value	Choose <span style="float: right;">v</span>	

PROCESS

## Risk movement/time lapse custom visualisation

### Configuration Required

As part of CoreStream's objective to provide custom visualisations that provide valuable insight to our clients, we are releasing a risk focused movement visualisation. The visualisation allows users to view the current position of Risks (and can be based on inherent and target scores if required) either as an aggregated view or 'ungrouped' as the individual risks. Each end user may chose the view they prefer:

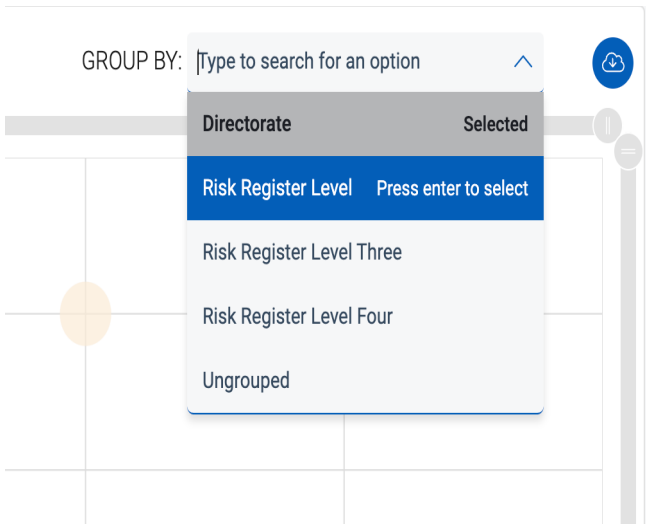
In addition to displaying the static position of risks based on likelihood and impact ratings, the movement over time can be displayed, based on a timeframe selected by an end user:

In addition to viewing movement between current position and a point in the past, a time lapse



movement is available to animate the movement over time. This can show any increases that may have occurred during a period but are not visible by simply viewing either end of the timeframe.

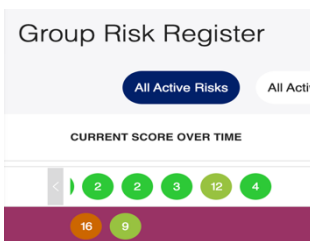
This visualisation helps our clients understand how different categories of risk and improving or worsening, as well as looking at the performance of specific areas of the business or risks that apply to different parts of the value chain.



## New graphical column type in grid that shows history of a given item

*Configuration Required*

CoreStream grids can now present progress/trends using a new graphical column. Each entry shows the different status a given row has passed through since the point it was created. Hovering a given 'bubble' provides summary details on the item, and clicking launches the full form for that particular version.



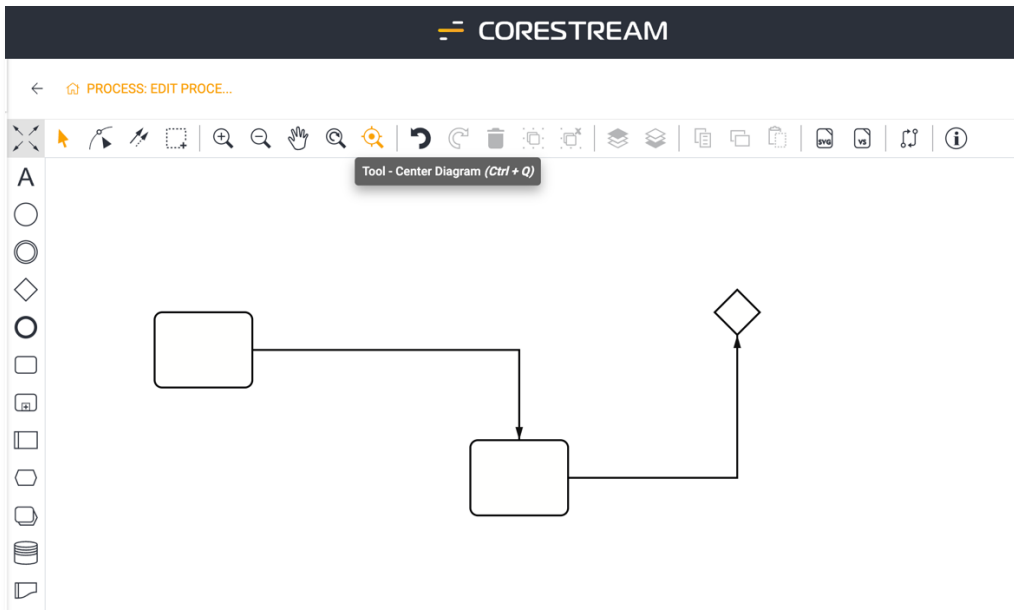
This feature can be used to track changes in items over time and it is triggered in configuration meaning that there is full flexibility in terms of plotting a new point per save or based on a certain criteria such as when the score or rating changes.

## Core Features

### 'Centre Map' feature for process maps

*Automatically Added*

A core component of many compliance solutions, the CoreStream process mapping capability now has a 'centre map' feature to allow users to centre a process map on the screen when working on larger, more complicated process maps.



### Conditional deletion of files for OneDrive integration

*Configuration Required*

The option to delete files on OneDrive (using the CoreStream OneDrive integration) is now available and can be visible/hidden depending on the group permissions of a given user.

Access and download multiple files at once by clicking [here](#)

Files



Screenshot.png

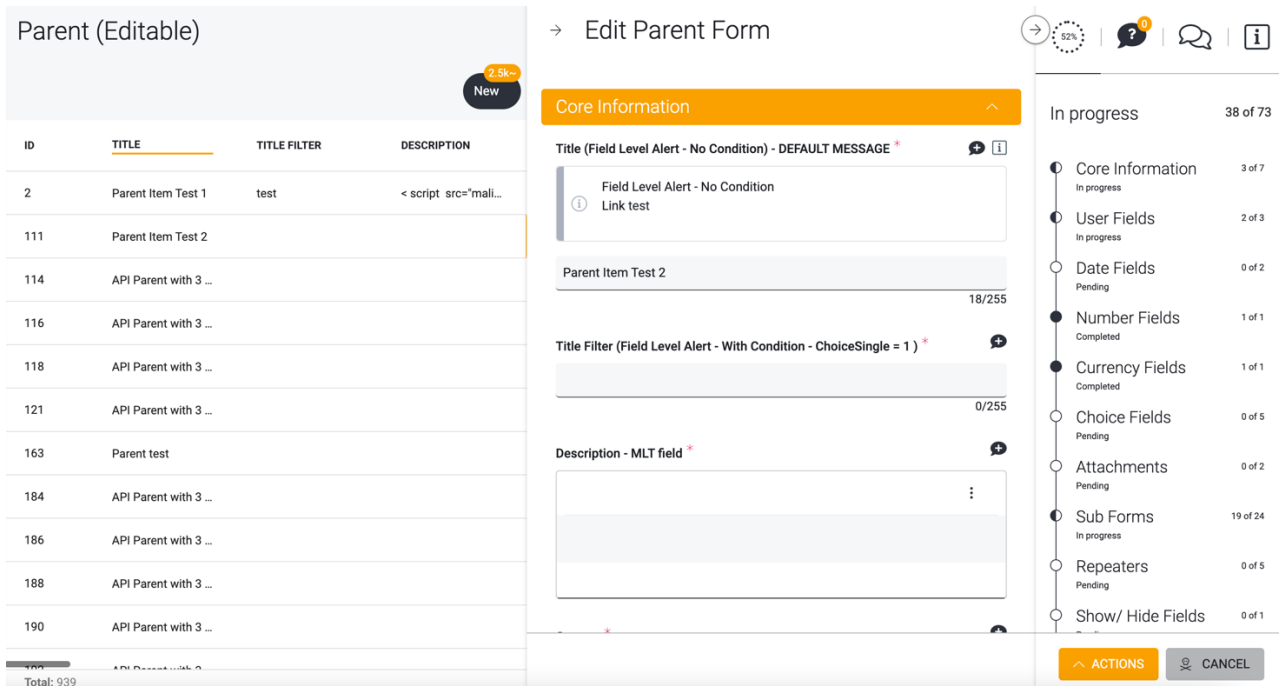
1.3 MB | 16 Sep, 2022 15:25:01

Drag items here or click to upload to root

## Ability to display a form in 'half-view' on grid views

*Configuration Required*

Forms can now be opened in 'half-view' mode meaning that the corresponding grid can be viewed at the same time. This is an optional feature to be typically used where there are a low number of sections/fields in a form and/or it is useful to see the grid the form has been launched from.



## Ability to export just the last comment added to an appendable comments field (as an option)

*Configuration Required*

For Excel and PDF exports, we are now able to configure comments fields so that only the last comment added to an item is exported.

## Option to open a link to another CoreStream screen in a new tab

*Configuration Required*

Action menus that jump from one screen to another (to view a grid item in tree view mode, for example) can now be opened in a new window, retaining all filters and sorting as a result.

## **Feature to optionally run workflow in the background**

### *Configuration Required*

Workflow triggered by an end user (when clicking a button, for example) may now be configured to run in the background. Where workflow is performing technically demanding or high volume tasks, this enables a user to continue using CoreStream as the workflow progresses in the background. Users are then notified when the workflow has completed. This feature enables the running of more complicated workflows real-time and removes the reliance on background services run overnight.

## **Self serve portal (v2)**

### *Configuration Required*

The CoreStream Platform provides a self serve portal that our clients use to provide a dynamic, searchable question and answer facility for users. This permits the searching of categorised areas based on role and location.

The feature has been updated to make the returned results more flexible, and to support the answering of further questions through integrated CoreStream forms.

## **Order of sub form repeaters in forms now reflect in word/PDF exports**

### *Automatically Added*

Previously, the order of sub form items in forms was not reflected in Word and PDF exports. This has been updated to retain the ordering.

## **Ability to bulk download documents from the OneDrive integration field type**

### *Configuration Required*

A link has now been integrated with the OneDrive integration on forms so that users are able to directly access the area on OneDrive to access specific features such as the bulk download of files.

## Configuration Improvements

### **Ability to copy items using fields that are not presented in a given grid view**

*Automatically Added*

Items can now be copied using any fields available in the entire collection whereas previously they had to be included in the grid view they were being copied from. This speeds up configuration and works to reduce any clutter in grid views where columns were added purely for copying purposes.

## Issue Fixing

### **Resolution of issue resulting in session log displaying times +1 hour**

*Automatically Added*

The CoreStream log displaying each user session was displaying times +1 hour in certain circumstances. This has been resolved for all time zones.

### **Accessibility (Keyboard navigation for bulk updater feature)**

*Automatically Added*

As part of our commitment to be WCAG 2.0 compliant, we have updated our bulk updater feature to function with keyboard navigation.

## Integrations

### **Dun and Bradstreet API Integration**

#### *Configuration Required*

The CoreStream Platform has now integrated with Dun and Bradstreet, facilitating the transfer of data. This will be primarily used as part of our third party risk solution and, as with all CoreStream integrations, has been developed in a reusable fashion. Our integration toolkit enables these integrations to be configured via menu driven options as opposed to requiring code based implementations. The primary purpose of this integration is to retrieve information in relation to third parties to enable a risk assessment to be undertaken. This includes obtaining Ultimate Beneficial Owner information and financial information to support assessment across multiple risk domains.

### **Exiger API integration**

#### *Configuration Required*

The CoreStream Platform has now integrated with Exiger, facilitating the transfer of data for the purposes of screening third parties. As with all CoreStream integrations, has been developed in a reusable fashion. Our integration toolkit enables these integrations to be configured via menu driven options as opposed to requiring code based implementations. The primary purpose of this integration is to retrieve information in relation to third parties to enable a risk assessment to be undertaken. This includes obtaining Ultimate Beneficial Owner information, sanctions checks and other information, such as adverse media, to support assessment across multiple risk domains.

### **RDC API Integration**

#### *Configuration Required*

The CoreStream Platform has now integrated with RDC, facilitating the transfer of data. This will be primarily used as part of our third party risk solution and, as with all CoreStream integrations, has been developed in a reusable fashion. Our integration toolkit enables these integrations to be configured via menu driven options as opposed to requiring code based implementations. The primary purpose of this integration is to retrieve information in relation to third parties to enable a risk assessment to be undertaken. This includes obtaining Ultimate Beneficial Owner information, sanctions checks and other information to support assessment across multiple risk domains.

## **SAP Ariba API integration**

### *Configuration Required*

The CoreStream Platform has now integrated with SAP Ariba, facilitating the transfer of data. This will be primarily used as part of our third party risk solution and, as with all CoreStream integrations, has been developed in a reusable fashion. Our integration toolkit enables these integrations to be configured via menu driven options as opposed to requiring code based implementations. The primary purpose of this integration is the exchange of third party information with SAP Ariba to enable due diligence activities to be actioned from within the CoreStream Platform and results passed back into SAP Ariba for decision making.

## **Microsoft CRM integration**

### *Configuration Required*

The CoreStream Platform has now integrated with Microsoft CRM, facilitating the transfer of data. As with all CoreStream integrations, has been developed in a reusable fashion. Our integration toolkit enables these integrations to be configured via menu driven options as opposed to requiring code based implementations.

## **Microsoft SharePoint integration**

### *Configuration Required*

The CoreStream Platform has now integrated with Microsoft SharePoint, facilitating the transfer of data. As with all CoreStream integrations, has been developed in a reusable fashion. Our integration toolkit enables these integrations to be configured via menu driven options as opposed to requiring code based implementations.



## Technical

### **Ability to revert configuration even if API is down**

*Automatically Added*

This change allows configuration files to be reverted if a change either causes or is impacted by the API being down. This speeds up troubleshooting.

### **Column indexing to be controlled via configuration**

*Configuration Required*

One of the core features of the CoreStream Platform is our ability to create and maintain database tables via our configuration layer. This feature extends this to enable the indexing of columns via the configuration layer.

### **Save Form and SubForm Refactoring**

*Automatically Added*

The key methods for saving content via forms and sub forms have been refactored to improve performance and future maintenance.

### **Store Configuration in database instead of file system to circumvent process locks while reading configuration**

*Automatically Added*

The CoreStream configuration files have been moved to the database from the file system so to prevent locks when being read. This change also paves the way for intended changes to configuration itself, making the save process more efficient - and therefore configuration more efficient.

For more information please contact:

**RICHARD EDDOLLS**

**PLATFORM DIRECTOR**

**[RICHARD.EDDOLLS@CORESTREAM.CO.UK](mailto:RICHARD.EDDOLLS@CORESTREAM.CO.UK)**

