

CORESTREAM

CoreStream Platform v2.1 Release Notes

28 Feb, 2023



Document Purpose

This document provides a summary of the highlights of the CoreStream 2.1 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.

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

2.0 was certainly a tough act to follow. We released a number of key features including our new policy management portal, an artificial intelligence-based controls assessment and made great strides in reporting, including a new risk visualization tool, and admin configurable dashboards. 2.1 is a worthy successor, introducing some new key features and ensuring that great strides have been made in our already industry-leading platform configuration.

The new features in 2.1 includes a new 'master grid' that enables admin users to dynamically access any data from any database table in the entire platform and a new radar chart to further enhance our reporting capability.

This release also reflects a number of updates based on conversations with clients and partners. Feedback centered around the grid based bulk updater (and it not being as intuitive as the rest of the platform) has been addressed in a new updated version that is automatically available as part of the upgrade. The performance issues noticed in sites where end users attempted to export thousands of rows into a PDF file has also been addressed by limiting PDF files to less than 200 rows.

The most exciting addition in this release though, is our new site builder. The flexibility of our platform has always been one of the key pillars of our success, and our site builder looks to provide this configurability in a wizard-based format, and one that uses intelligent defaults to create new sites even more quickly than we can today. This is a real step change – and something we are looking forward to extending during the remainder of 2023.

As always, if you have any questions, would like to submit ideas for future releases, or just want to provide feedback, please do get in touch.

Cheers,

Rich

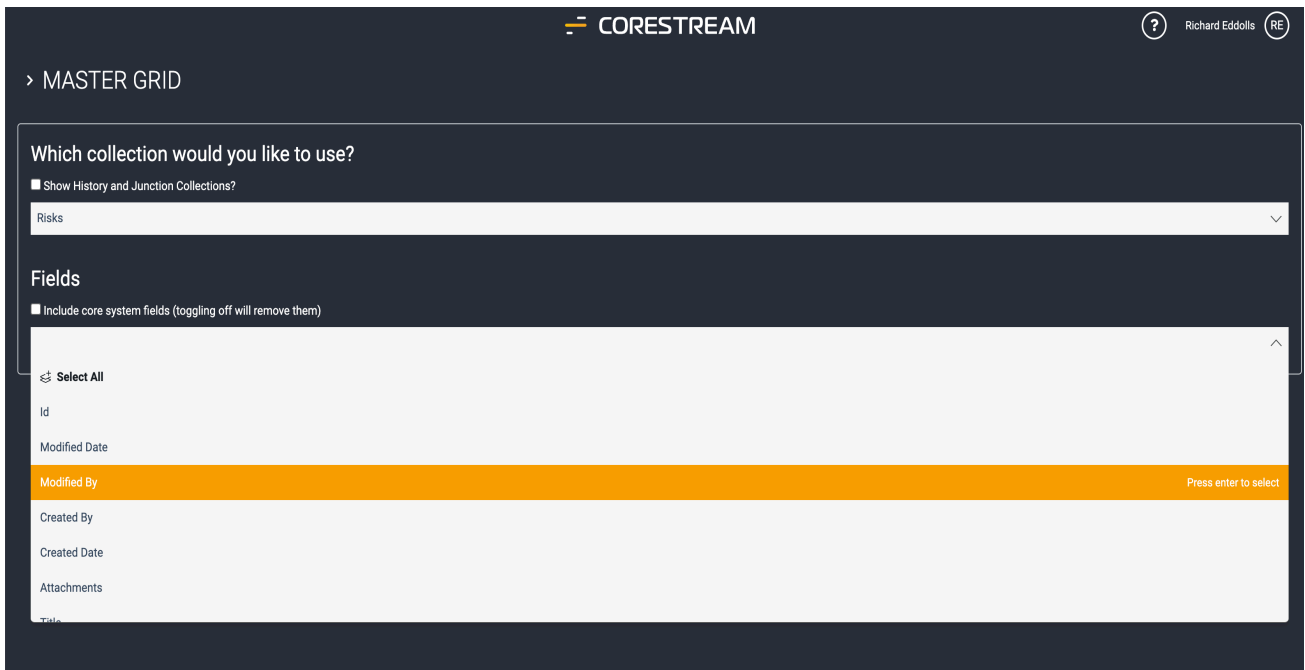
Release Notes

Strategic Features

Master grid (selection of any collection and all columns)

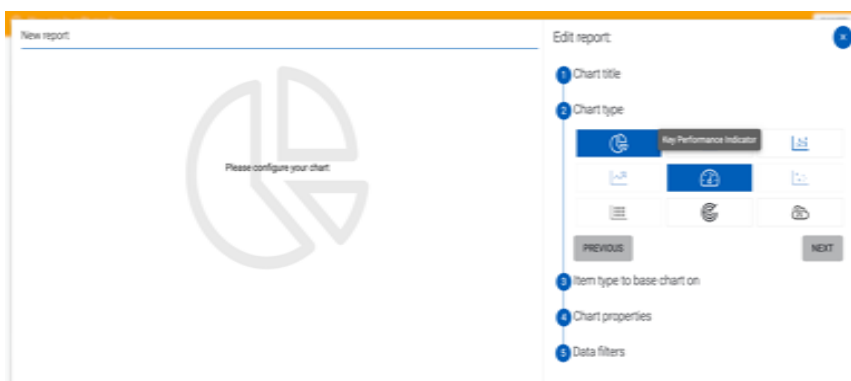
Configuration Required

CoreStream has introduced a master grid that enables our support team to create a grid of data for any collection and any fields within that collection. This is particularly useful to investigate the changes to an item over time and allows us to pinpoint the exact user action which caused an item to update. This will be extended in future releases so that fields can be accessed in view and edit forms. It will then be made available to client administrators to give full control over all Platform data.



KPIs in client administrator configurable reporting

Configuration Required



KPIs Reports are now available to be configured as part of the wizard used by client administrators (where this feature has been enabled in configuration).

Core Features

Radar chart

Configuration Required

The CoreStream Platform now has a radar chart that can show the relationship between different segmentations of data as per the below.

This chart is available within client administrator configurable reporting.



Ability to configure rich text on the authentication page (log in screen)

Configuration Required

The CoreStream log in page can now be configured to include rich text, enabling key messages to be present in larger text, bold or in different colours. This will help Client Admin teams to communicate with their users if there is a particular deadline or expected downtime for the CoreStream platform. Links may also be included.

Capture the log out date/time when a user is logged out automatically due to sliding session

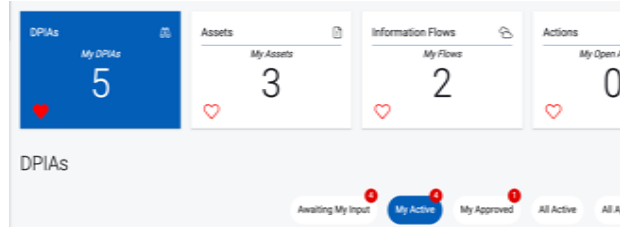
Automatically Added

Previously, log our date/time was only captured in the session logger if a user explicitly signed out. This has been extended so that sessions ending due to sliding session are also logged.

Ability to link directly to tabs and forms when accessed via the CoreStream dashboard (tile) view.

Automatically Added

The CoreStream dashboard (tile view consolidating multiple grids) now allows for the direct linking to grid tabs and forms. This was only previously possible when linking to an individual grid.



Expanded charts to be fixed (not scrollable)

Automatically Added

Previously, expanded charts allowed for scrolling of the background reporting dashboard. This is now fixed so that an expanded chart remains as the main focus until it is collapsed.

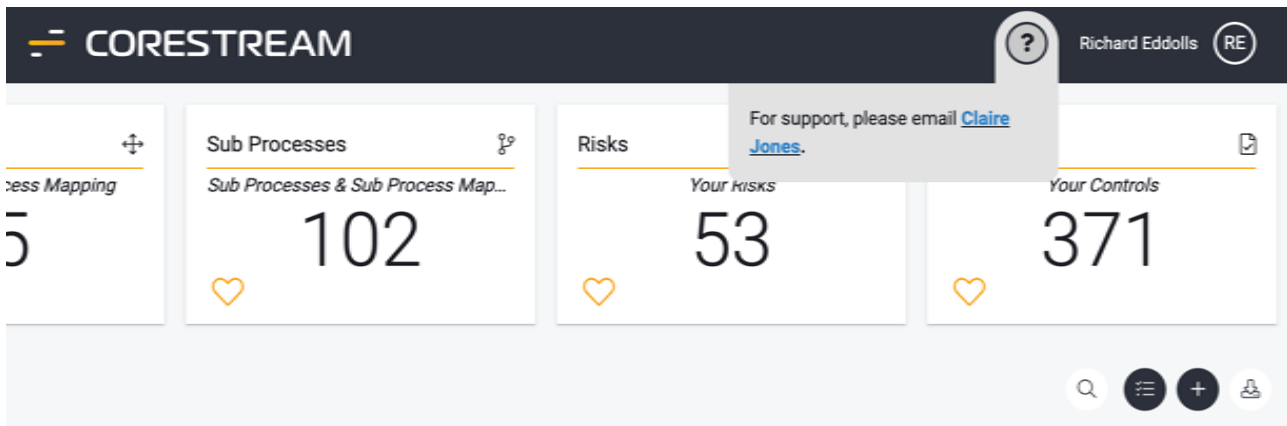
Support for XML attachments

Configuration Required

XML files were not previously supported as a valid field type for CoreStream attachments. This has now been extended to support this file type where clients require it.

Introduce “?” symbol in a given site header so as to provide support details in a more integrated fashion

Configuration Required



CoreStream can now include a symbol in the header of each page so that users have quick access to the support contact for a given site.

Other information may also be included, and links to other sites and/or email addresses may be included. The content shown may be global (the same for all entities) or tailored based on entity, for sites where clients have different support teams for different entities.

Validation for bulk updater options

Automatically Added

it was reported by clients that the user experience for the grid bulk updater was resulting in times where a field was to be changed but no type of change was selected. Validation has been introduced so that if a field has a value, and no type of change is selected, the user is prompted that they are not allowed to proceed.

There is 1 field to complete in this form. ✕

Release Notes ^

Include in release notes?

PLEASE SELECT ▾

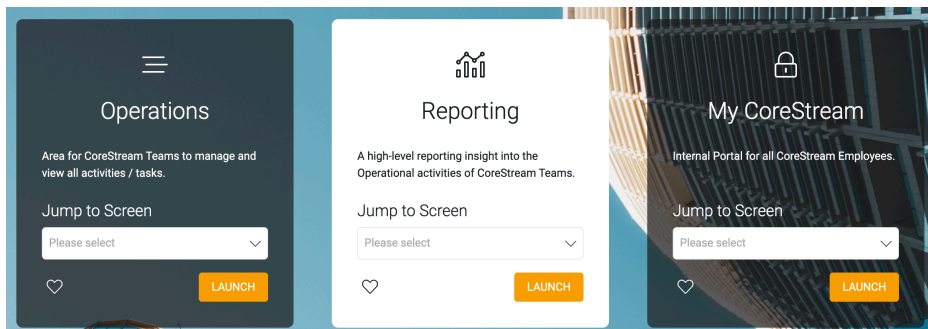
This field must have selected update type.

Reason for this ticket

Ability to specify icons for sub navigation pages that are included in welcome pages

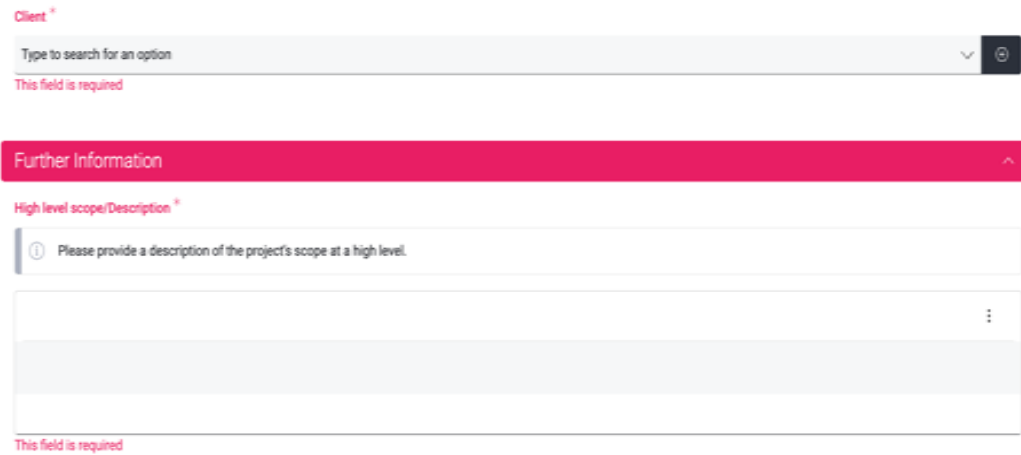
Configuration Required

Welcome pages provide tiles to clearly signpost users to a given area of a site. Where this is a screen included in sub-navigation, it is now possible to specify an icon to show, as it was previously for main navigation items added to a welcome page.



Improvement to validation - not repeating question text when highlighting mandatory fields

Automatically Added



Previously, when mandatory fields validated, the question text was repeated. This used up space in the form (increasing scrolling) for unnecessary information. The validation has been improved to show the following:

Wording changes for client administrator configurable reporting

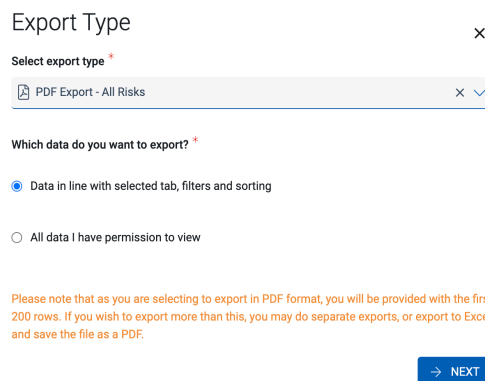
Automatically Added

Wording in the chart configuration wizard has been refined so as to remove technical references and/or confusing language, ensuring the feature is intuitive for client users.

Solution for PDF exports consuming resources

Automatically Added

Grid exports to PDF are resource intensive and can lead to the slow down of sites and servers where a large number of rows is exported. PDF exports have been limited to 200 rows in order to guard against such an event. Excel exports will continue to support larger numbers of rows.



Removal of 'copy' where a sub form repeater item is cloned

Automatically Added

Previously, when a sub form repeater row was copied, the word '(copied)' was appended to the title. This has been removed so that items are the title is now cloned like for like.

Maximum number of words displayed in Tag Cloud to reduce render time

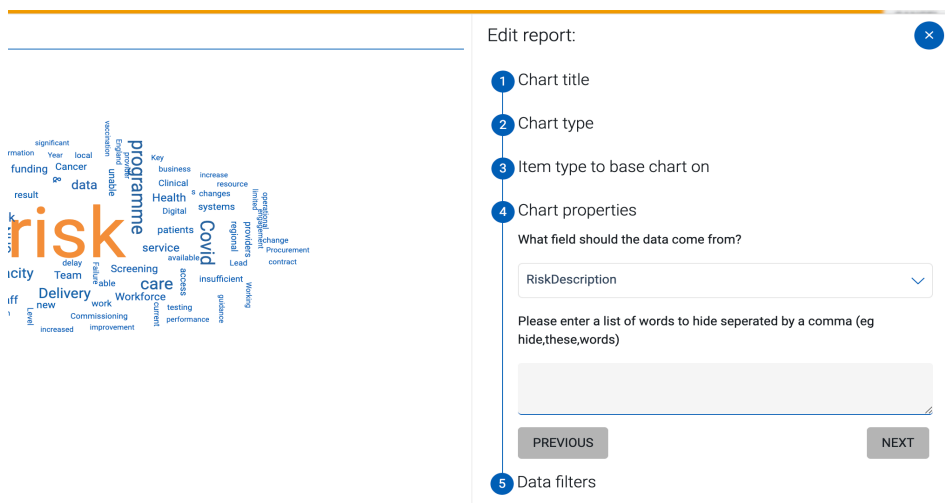
Configuration Required

Tag clouds can now be limited by the number of words they show, so the top x words are presented, rather than all words. This reduces both render time and increases the usefulness of the chart.

Tag cloud addition to client administrator configurable reporting

Configuration Required

The tag cloud is now included in the client administrator configurable reporting.



Configuration Improvements

Environment variables so as to enable different configuration settings between environments without the need for manual change

Configuration Required

For certain CoreStream configurations, it is sometimes necessary to have different properties in configuration for a given site. For example, a configuration environment, UAT environment and Production environment may integrate with different instances of OneDrive, or use a different API for data retrieval. We may also want different log in page text to clearly identify what a given environment is used for.

The introduction of environment variables allows for these different properties to be specified for a certain URL. This removes the need to make manual changes when promoting configuration from one environment to the next, eliminating the risk of error.

Inclusion of a notes section in each area of configuration (to explain what it is doing).

Automatically Added

A notes facility has been added to the configuration interface so as to allow configuration analysts to make notes as to what a specific part of configuration is aiming to do and/or if there are specifics that need to be known by those maintaining a given site.

→ Form

General

Notes for Configurators

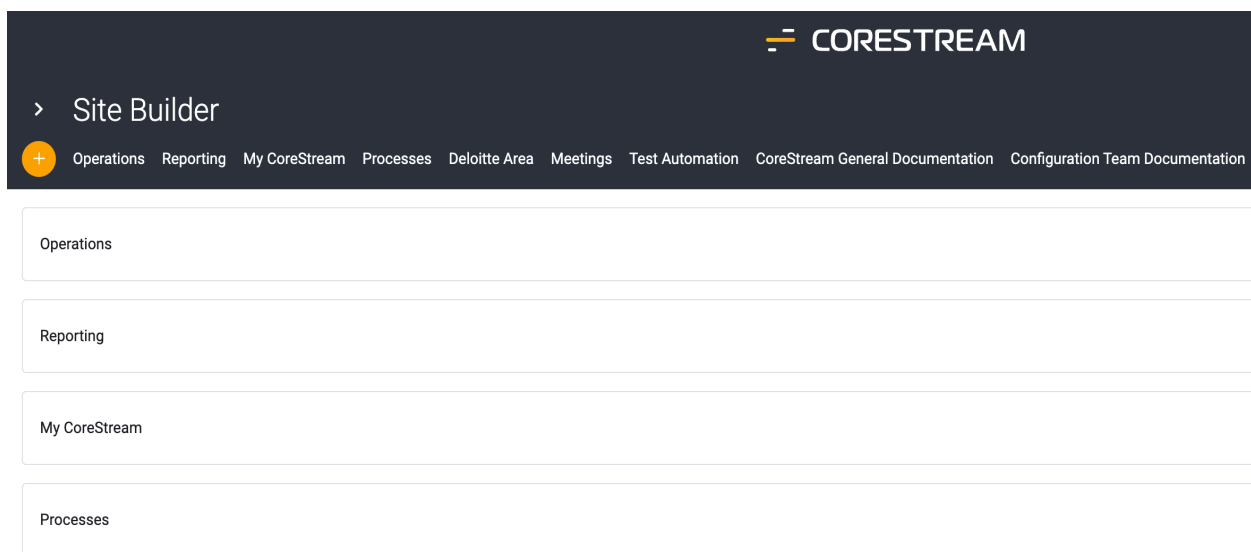
Notes for Configurators

This part of configuration is....

Site builder wizard

Configuration Required

The first version of the CoreStream site builder is now available. This supports the creation of site structure (entities, screens and navigation) using a wizard style interface. This significantly reduces the time taken to perform configuration and paves the way for further wizard based configuration, and the introduction of template configuration elements.



Issue Fixing

Ensuring grid filtering is retained when the bulk updater mode is enabled

Automatically Added

Previously, enabling the bulk updater removed any filters applied to a grid. This has been resolved so that enabling the bulk updater mode does not remove any filters a user has applied to a grid.

Technical

Excel Export Data Model Refactoring

Automatically Added

The Excel exports from grids have been refactored to improve performance and maintainability and pave the way for end user configurable exports in CoreStream 2.2 (due out in February 2023).

Integrations restructure

Automatically Added

The CoreStream Platform is integrated with numerous third party systems. When implemented, these are then available to other clients through our configuration interface, whereas new integrations require an element of code and are therefore reliant on the release process.

Given the large number of requests to integrate with third party systems, the codebase that controls this feature has been moved outside of the core Platform code. This allows for integration work to be conducted independently of the main release.

Upgrade to .NET version 6.0

Automatically Added

As part of the 2.1 release, CoreStream will now operate using .Net 6. This will move to .Net 7 in our 2.2 release.

For more information please contact:

RICHARD EDDOLLS

PLATFORM DIRECTOR

RICHARD.EDDOLLS@CORESTREAM.CO.UK

