

**CORESTREAM**

# CoreStream Platform v2.3 Release Notes

14<sup>th</sup> July 2023



## Document Purpose

This document provides a summary of the highlights of the CoreStream 2.3 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 Platform continues to go from strength to strength and we are excited about the features we have coming in 2023. Release 2.3 was more about ensuring we deliver on one of our main strategic objectives - delivering a stable, performant platform that can be rapidly configured.

In 2.3 we have released a new version of our site builder; extending support for other component types, extending the intelligent defaults and automating yet more configuration that was previously a manual exercise. We have supplemented the site builder with other tools (including an early prototype for self-documenting sites) to continue to ensure we can do more with less for our clients. We are configuring increasingly sophisticated and larger scale sites in a decreasing amount of time!

The team has also made giant strides in our goal to be leader in integrations. Our generic integration capability means that we can now configure (without a single line of code) integrations with various data sources. The rapidly expanding number of third party risk sites we provide, pulling in data from various third party systems (Dow Jones, Dunn & Bradstreet, Exiger to name just the tip of the iceberg) is one of the main drives for our focus on this area, though integration requests are increasingly common across other modules too.

Quality continues to be at the heart of what we do. This release has seen a focus on eradicating any technical debt, further improving performance and continuing to extend our tool to enable the automated testing of configuration.

More to come shortly (2.4 is out in September) but until then, please do reach out to your CoreStream Business Owner if you would like to discuss any of the features listed, or submit more ideas for our roadmap. Clients and Partners continue to have a big say in the work we prioritise!

Cheers,  
Rich

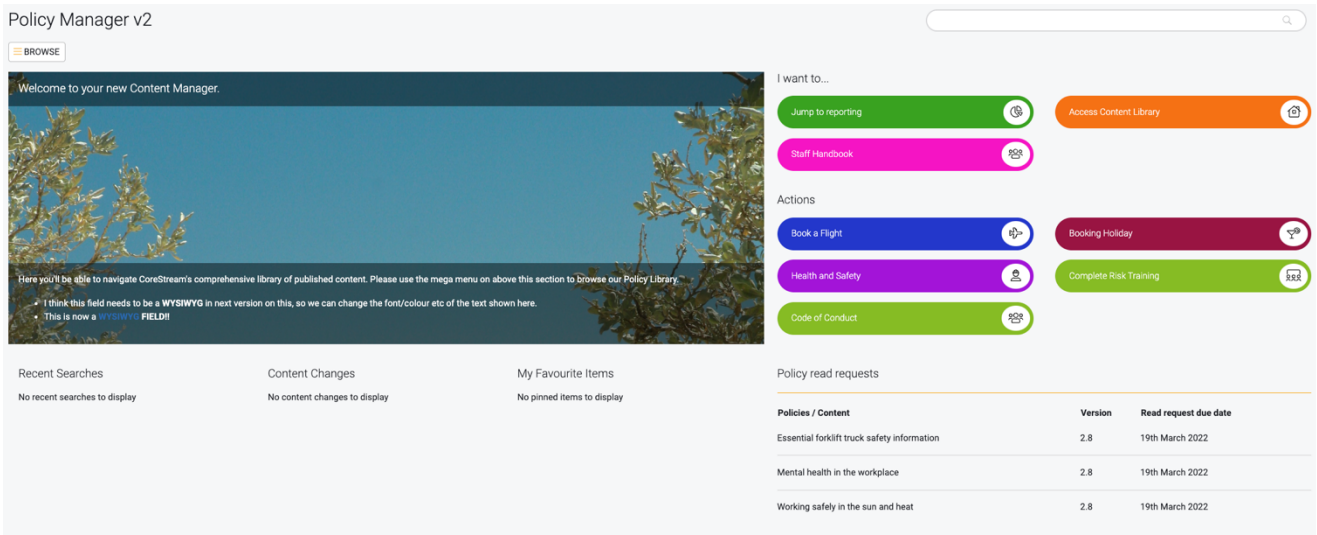
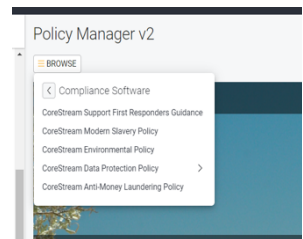
# Release Notes

## Strategic Features

### Improvements to CoreStream Policy Manager look and feel

*Automatically Added*

The new 'web site' format for CoreStream Policy Manager was launched in our 2.0 version. In 2.3 we have made some improvements to the look and feel including placing more emphasis on the 'mega menu' style navigation. In 2.4, we are also integrating attestations into the capability, ensuring that those consuming and confirming their understanding of policies can do so in a self-contained web site.



## Core Features

### Ability to display comment fields in grid views

*Configuration Required*

Comments fields are now available for presentation in grid views, showing the history of comments against an item, without needing to open a form.

## Ability to delete comments (permission based)

*Configuration Required*

Appendable comments fields can now be configured to allow certain users delete individual comments. This is configurable within individual forms so can be limited to certain comments fields as required.

ID	COMMENTS	C
513		P
491		C
297		C
201		C
199		C
180		C

## New timer/stopwatch field type (to sit on top of integer field)

*Configuration Required*

CoreStream forms now have a new form field type: a timer stop watch that can record an activity and then log the time in the database. Starting another timer in the same form can be configured to stop any timer that is already running.

This is to be used to track the amount of time some of our US clients spend on regulatory activity, but can be used for other purposes.



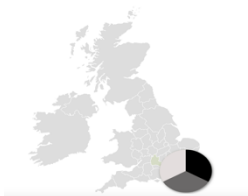
## Ability to use the data import tool to update existing rows (and not just create new ones)

*Configuration Required*

The CoreStream data import tool can now be used to update items. The feature accepts a spreadsheet and then evaluates rows to determine if they already exist. Rows that already exist (based on a specified column, or a combination of multiple columns) are updated rather than having duplicate rows appended.

## County map of the UK (with integrated pie chart)

*Configuration Required*



A new chart type has been added to the CoreStream suite. This chart provides a heat map of the UK, segmented by counties. Drilling into a county provides a pie chart of entries for that county.

## Inclusion of links in the emails in the logger (such as password reset or new user)

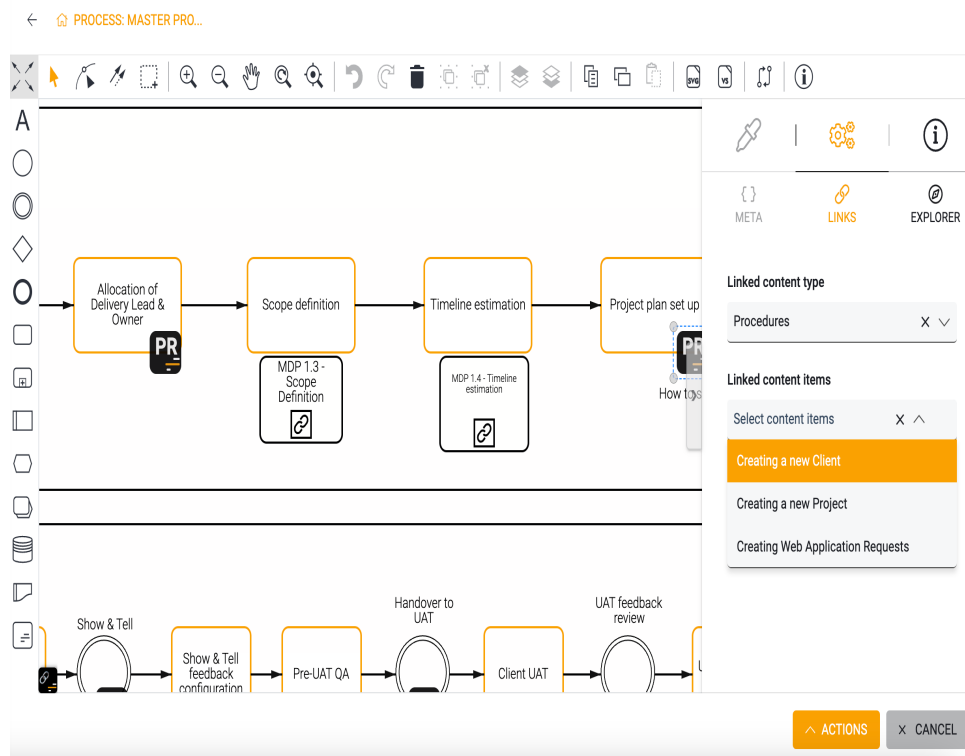
*Automatically Added*

The logging of emails sent by an instance of the CoreStream Platform has been extended to include the links that are contained, allowing users to replicate the experience of the recipient.

## Process mapping: Ability to config display field templates for the dropdowns on maps

*Configuration Required*

We now have the ability to apply set display field templates for dropdowns on process maps. This allows us to display more information in the dropdowns:



## Configuration Improvements

### CoreStream Site Builder v4

*Automatically Added*

The latest iteration of the wizard based CoreStream site builder sees support for the "My CoreStream" tile view, reporting dashboards, improvements to the user interface and more intelligent defaulting. The site builder continues to improve the speed and accuracy of platform configuration.

## Improving messaging within email configuration

*Automatically Added*

The emails section of the CoreStream configuration interface has been improved to make the settings more intuitive. Language has been updated and more tooltips and alerts have been included to remove any ambiguity.

## Form/Section/Field Excel import capability

*Automatically Added*

CoreStream has developed an Excel based import function that can automatically create database tables and fields, and the associated configuration to place those fields in appropriate sections and forms throughout a site. This feature is also able to export existing site configuration so that changes can be made and reuploaded. The benefit of this feature is the ability to more rapidly create form configuration - especially for client examples where individual forms may contain hundreds of fields.

## Ability to automatically create Conditions and Events for every choice field value

*Configuration Required*

The CoreStream workflow engine is built upon configurable conditions (checking if something is true or false) and events that set a field to a specified value. In 2.3, we have developed an admin tool to automatically create a condition and event for each value in a choice field that is to be used for workflow. This helps increase the efficiency of workflow configuration.

## Configuration validator rule to highlight any environment variable tags that are not referenced in the site configuration

*Automatically Added*

Continuing the journey towards automated configuration testing, we have added a rule to check if any environment variables are specified, but not referenced in site configuration. The environment variables feature is used to account for the differences in things like integration configuration (where a test site may point to a test site for that particular integration but live will point to live) and this helps ensure final checks are performed automatically, reducing the risk of error.

## Issue Fixing

### Commas in choice fields causing issues with grid filtering

*Automatically Added*

Commas in choice field values were previously causing issues with filtering on grids. This has been resolved in our 2.3 release and filters will now apply as expected.

## **Validator rule: Highlight action options that do not have sidebar and comments properties set correctly**

*Automatically Added*

A change to the approach to configuring comments fields in the sidebar lead to an unintended increased risk of inadvertently switching off comments from the side panel. This has been addressed and a configuration validator rule has been created to guard against any such event in the future.

## **Technical**

### **Refactor of user import (data import tool)**

*Automatically Added*

The import tool used to populate user accounts in bulk has been refactored. This focused on improving performance (upload time) and the validation/ error messages provided where there are data quality issues to highlight.

### **Dynamically identifying the columns required for workflow and fetching only those columns**

*Automatically Added*

This is a performance improvement for CoreStream workflow to restrict the number of fields returned in a query used by workflow.



For more information please contact:

**RICHARD EDDOLLS**

**PLATFORM DIRECTOR**

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

