CORESTREAM

CoreStream Platform V2.5 Release Notes

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Document Purpose

This document provides a summary of the highlights of the CoreStream 2.5 (vNext Current Release) 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.

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Platform Director Overview

Our 2.5 release is a combination of showcase features, and some smaller changes that will help us continue our work on ensuring CoreStream is the most intuitive GRC Platform available. We have also ensured that non-functionals continue to receive the attention they deserve.

In terms of showcase features, CoreStream can now automatically generate a risk bowtie, showing the causes and consequences for a given risk, along with the preventative and recovery controls and mitigation that are being performed. We have received positive feedback on this from clients already, many of whom are keen to utilise this in risk workshops with the aim of making them more interactive.

The 2.5 release of CoreStream also introduces our support for the submission of items by users who are not authenticated. This helps us broaden our offering in the whistleblowing / speak-up areas as well as opening up opportunities for members of the public to submit items directly into CoreStream. This is a welcome addition for clients utilising CoreStream for subject access requests (SARs) and freedom of information (FOI) requests, removing the need for users to key cases into CoreStream when they are received through other means.

Continuing our focus on acting upon client feedback, we are also providing the ability for users to interrogate version history at the field level. The data to do this has always been available, and we are now changing the way we surface the information, in line with the way users interact with the Platform. The ‘view versions’ feature in CoreStream will still be available, with the field level option being supplementary.

As we close 2.5, we are already excited about 2.6. CoreStream has utilised Artificial Intelligence (AI) for some time but we are about to take this to the next level…

Thanks,
Rich

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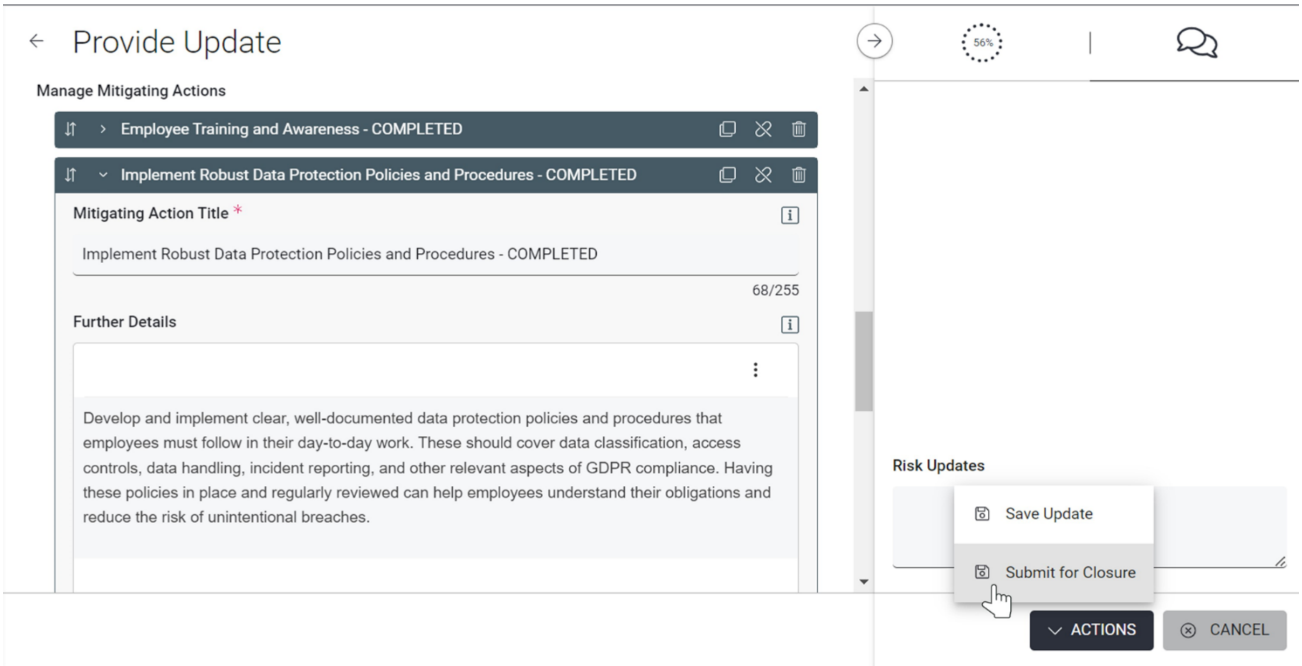
Release Notes

Strategic Features

Controlling button visibility based on "All Repeaters" condition

Configuration Required

Initially introduced in version 1.11 and enhanced in version 2.5, this feature allows us to control the visibility of a "main form" button based on values in fields within a sub form . For instance, we can display the 'Close Risk' button only when all associated Mitigating Actions have a status of either "Completed" or "Archived".



Field-level view of version history

Configuration Required

Prior to 2.5, version history could only be viewed at form-level. By selecting the version from a dropdown at the top of a view form, the full form reloaded to show the values at that point in time. It is now also possible to look at the version history associated with specific fields, and in both view and edit mode. For example, we can see the status of an item as it changed over time, including who changed this exact field at a given point in time.

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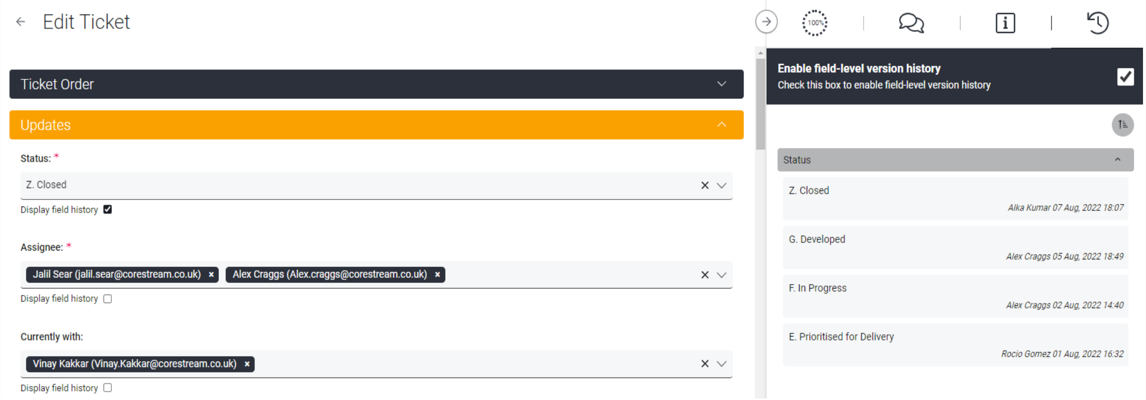
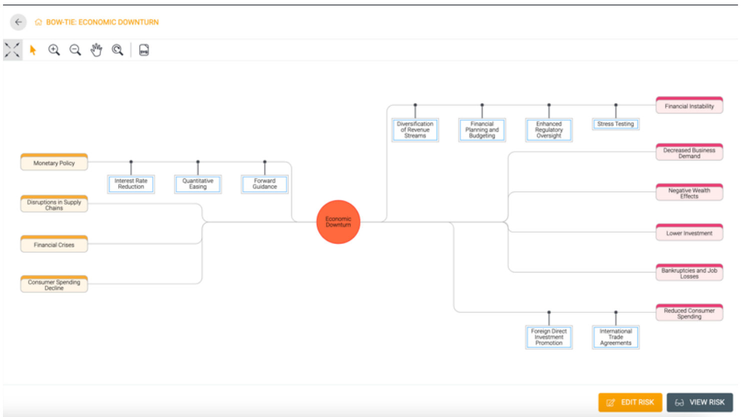
This feature works with all field types, apart from 'repeaters'. Support for repeaters will be introduced in an upcoming release.



Auto-generated Risk Bowtie diagram

Configuration Required

A Risk Bowtie diagram is a visual representation used in risk management to analyse and articulate risks, their causes and consequences and the mitigating activity. It consists of a central risk or event, with the left side representing the causes leading to the event, and the right side representing the consequences resulting from the event. It also includes controls to mitigate the causes or recover from the consequences.



A Risk Bowtie helps organisations identify and mitigate risks by illustrating the relationships between various risk factors and their potential outcomes.

Ability to anonymously create data in CoreStream

Configuration Required

The 2.5 release of CoreStream also introduces our support for the submission of items by users who are not authenticated. This helps us broaden our offering in the whistleblowing /

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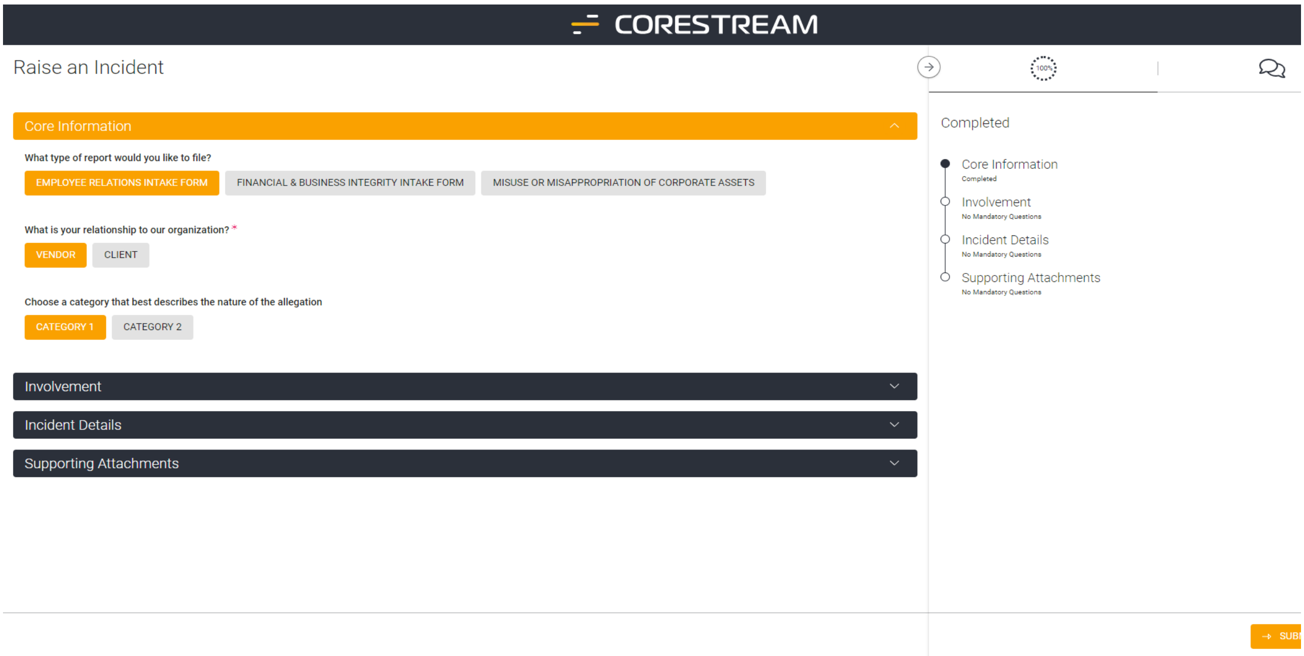
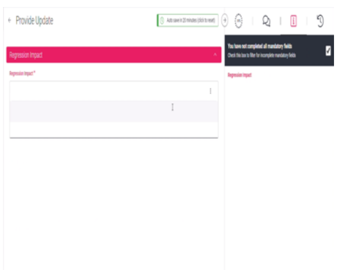
speak-up areas as well as opening up opportunities for members of the public to submit items directly into CoreStream. This is a welcome addition for clients utilising CoreStream for subject access requests (SARs) and freedom of information (FOI) requests, removing the need for users to key cases into CoreStream when they are received through other means.



Core Features

Ability to restrict a form to display only the incomplete mandatory fields

Configuration Required



In order to save time when completing large forms, CoreStream now allows users to restrict forms to present only mandatory fields that are incomplete.

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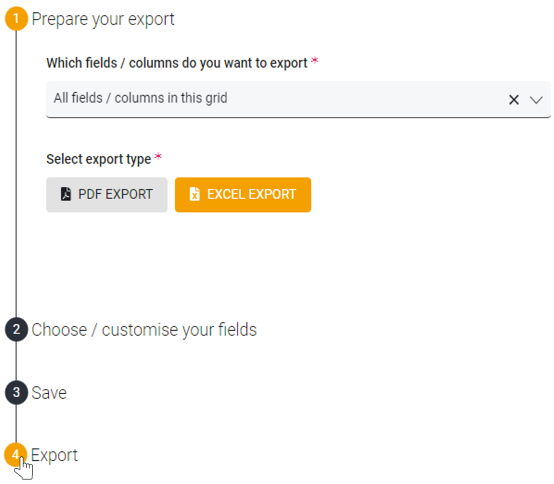
Ability to download an end user export without saving it first

Automatically Added

It is now possible to build a custom export and download, without needing to save it as a template. This aims to prevent the build-up of lots of unnecessary custom templates. In a future release, we will deliver the ability for admin users to delete templates within the wizard, a feature currently available when using the Client Config UI feature.



Configuration Improvements

Simplified Drillthrough Stacked Bar Chart configuration

Automatically Added

The client administrator configurable reporting has been extended to support drillthrough reports. Drillthrough reports consist of nested Stacked Bar Charts - clicking on the y-axis value, performs a drilldown into a chart that represents the lower level, filtered by the item selected. This might be used to, for example, show an Organisation Hierarchy on the y-axis and enable the user to click on a Level 1, and an equivalent chart with the associated Level 2 values on the y-axis.

Simplification of the configuration and guidance promotion process

Automatically Added

Previously, configuration promotions involved downloading multiple separate files from the source site and manually resubmitting attachments such as logos and Word export

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templates. Now, the streamlined process uses a single zip file for both configuration and attachments, simplifying promotions and reducing the risk of missing steps or making manual errors. This accelerates promotions and increases accuracy.

Ability to export specific configuration from one web application and import it into another

Automatically Added

In order to further increase the speed, reliability and consistency of configuration, enhancements have been made to an existing tool to move elements of configuration. The tool allows us to move only selected configuration from one location to another, in just a few clicks.

This can be used to more quickly build a new feature on a client site by starting from a pre-build version within one of our products (such as Information Asset Manager or Audit Manager).

Reverting configuration to a specific date

Automatically Added

Similar to the promotion process, reverting configuration previously required reverting each of the 7 individual files to a specific version. This is now possible via a single file selection.

Issue Fixing

Bug fix associated with Column selector and field names containing apostrophes

Automatically Added

While relatively rare on CoreStream platforms, some column names contain apostrophes. An issue has been fixed whereby personalisation containing field names with apostrophes was causing issues within the site configuration.

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Calendar component time zone bug fix

Automatically Added

For consistency, dates are stored in UTC time in the CoreStream database. In cases where a CoreStream Platform used regional settings that differed from UTC, such as British Summer Time being +1 hour, the Calendar would sometimes revert to UTC time when BST and UTC times fell on different dates. This has been resolved to consistently align with the Platform's regional settings.

Bug fix associated with removing columns from your personalised view that are required for some other function (e.g. Dual Forms)

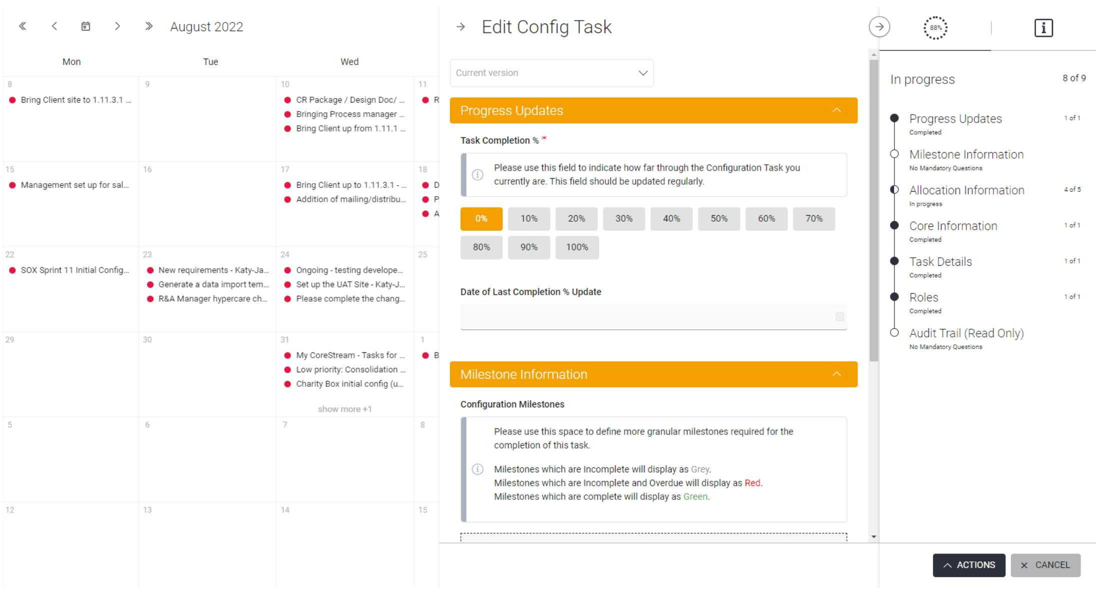
Automatically Added

A bug with the new Column Selector feature allowing users to personalise grid columns, has been resolved. A dependency has been removed, enabling users to have as few or as many columns in their view as needed, with no impact on the forms they load.

Calendar component now supports forms in "half view"

Configuration Required

Forms opened via the Calendar component can now be configured to open in half form mode.



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Updated axis label logic for Aged charts created by admin users

Automatically Added

A change has been made to the auto-generated x-axis labels for Aged charts, when configured by an admin user. The format is now "Number of {Object Name}", e.g. "Number of Risks" (previously "Count of Risks items"). It's also still possible to overwrite the value with something custom from the Config UI (or Client Config UI).

Compliance with WCAG 2.1 accessibility

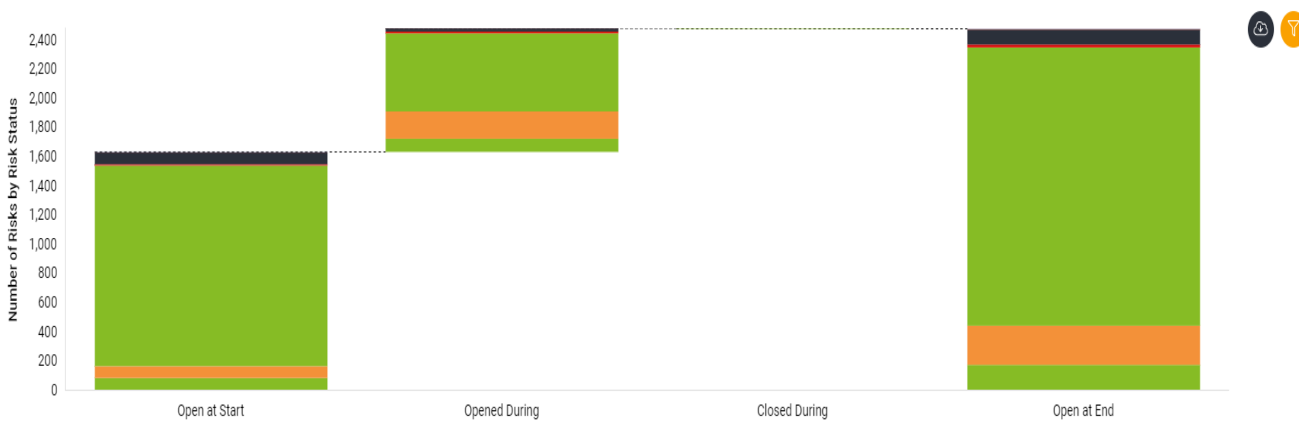
Automatically Added

In order to ensure continued compliance with WCAG 2.1 accessibility guidelines, a number of updated have been made in 2.5. This will continue in 2.6 to bring the platform into full alignment with the WCAG 2.1 and begin work to align with WCAG 2.2 guidelines that are due to be introduced during 2024.

Bug fix for Waterfall charts not showing items that were created/closed at the start/end of the filtered date range

Automatically Added

When applying a date range filter to a Waterfall chart, items created or closed on the exact date specified appeared in the chart but not in the drilldown grid. Date range filters are now fully 'inclusive', ensuring these items are visible in both the chart and its drilldown grid - keeping the two fully aligned.



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Ability for admin users to create bar charts with a free text field on the y-axis (e.g. Risk Register)

Automatically Added

It was previously only possible to select dropdown/choice fields when defining the axis value of a Bar or Stacked Bar Chart in the Admin Configurable Reporting wizard. This left possible gaps, such as trying to report on Risks by Risk Register (where the Risk Register is often stored in a text field). It is now also possible to select text fields when configuring these chart types.

Splitting out the configuration into smaller components for major performance improvements

Automatically Added

Previously, saving one export often resulted in unnecessary updates to other configuration, causing slow saves. This has been rectified.

These performance enhancements extend beyond exports and reports, benefiting End User Export and Admin User Reporting clients. They also enhance application startup, dashboard loading, Site Builder tool saves, and all other configuration saves. These changes lead to a more reliable version history for troubleshooting and support, with notable improvements such as:

- Loading large dashboards 58% faster.
- Initial log-in is 369% faster.
- Saving a single configuration item, like an export, is 116% faster.
- Creating a new Entity/Module with the Site Builder, involving many configuration items, is 1,754% faster.

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Technical

Updated all JavaScript libraries to the latest version

Automatically Added

As part of our business as usual process, the JavaScript libraries have been updated. Newer versions often include critical security patches, protecting our application and client data from known vulnerabilities.

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