CORESTREAM

CoreStream Platform 2.7 Release Notes

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+44 0207 100 4378 info@corestream.co.uk

Document Purpose

This document provides a summary of the highlights of the CoreStream 2.7 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

Following the feature rich 2.6 release with such highlights as our AI Co-pilot, 2.7 contains a series of smaller changes, but that combine to provide another impactful release.

The first thing to highlight is that we have listened. Clients have provided positive feedback on our end user configurable export capability but raised a suggested improvement around the ability to delete templates, and favourite those used frequently. We have developed this in 2.7.

A number of other changes such as the ability to show or hide form fields based on group membership and the improvement to our calculation engine help us cover more ground, more efficiently. This furthers our claim to be the best configurable platform there is!

An increase in client demand for translations has resulted in a refactor of this feature, ensuring we can rapidly and comprehensively translate our sites. As one client explained, sites should appear in native tongue and not appear as though they are translated. A challenge, but one that we have embraced!

A personal favourite is the ability to conditionally show certain choice fields. This facilitates a more intuitive user experience when supporting workflows across sometimes hierarchical data (think findings against an audit), especially when combined with the ability to show or hide form buttons based on the combined statuses of linked content. These are not the shiniest of features but elegant workflows are synonymous with CoreStream and we want to ensure that continues.

Please keep the suggested improvements and feature requests flowing. We will continue to prioritise our releases accordingly!

Rich

Release Notes

Strategic Features

Ability to upload logos directly to site and promote as usual - dependency on support portal removed

Automatically Added

Until now, we've securely hosted images and files on a central CoreStream site, ensuring accessibility without requiring authentication into the specific client environment. Primarily, this was for hosting logos visible in system-generated emails. However, we're now transitioning away from this method to decommission the dedicated hosting site. As an initial step, we've enabled client logos to be embedded directly within emails.

Improvement to calculation workflow capability to allow setting of Choice fields

Automatically Added

We recently introduced a calculation feature that greatly simplifies configuring complex calculations like risk assessments. In 2.7, we've added functionality for enabling the setting of choice fields alongside number fields. For instance, depending on where a Risk Score falls within a predefined range, we can now set a RAG field to 'Red', 'Amber', or 'Green' using this simplified calculation configuration.

Tracking of the button or background service that resulted in any data change

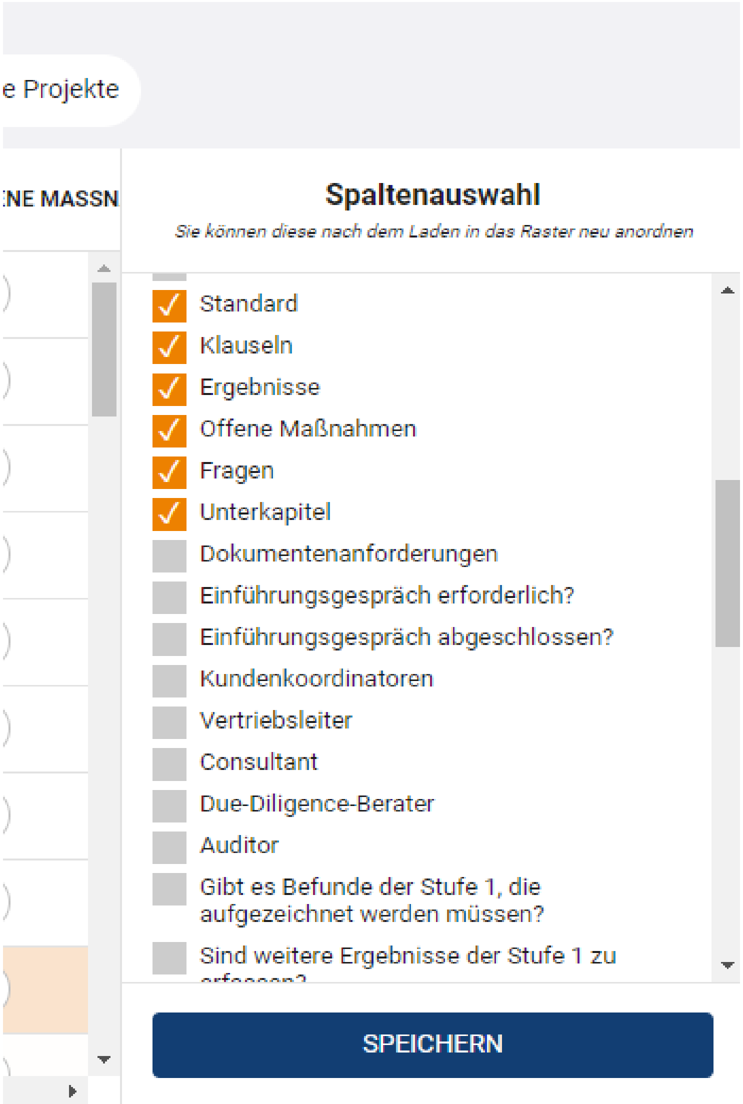
Automatically Added

To enhance client support, we've improved our versioning capability. Alongside storing a historical record for every change, we now capture the specific operation that triggered the change, whether it's a form button click or an overnight job like hierarchy synchronisation. This enhancement streamlines the Support process by enabling our team to quickly focus on specific areas of complex sites.

Further improvements to the Translation functionality

Configuration Required

We've refined the recently added German translations and added support for the Column Selector feature in all languages.



Ability to show/hide buttons in the main form, based on the combined statuses of associated content

Configuration Required

We've enhanced the capability to show/hide buttons on the main form based on associated content statuses. For instance, in an Information Asset Management (IAM) module, this feature can prevent the closure of Freedom of Information Requests until all associated Data Tasks are either completed or archived. Previously, all associated tasks had to have the same status (e.g. completed) to use this feature. Now, we also support more complex logic, such as a combination of different statuses (e.g. completed or archived).

Core Features

Showing/hiding fields and sections based on group permissions

Configuration Required

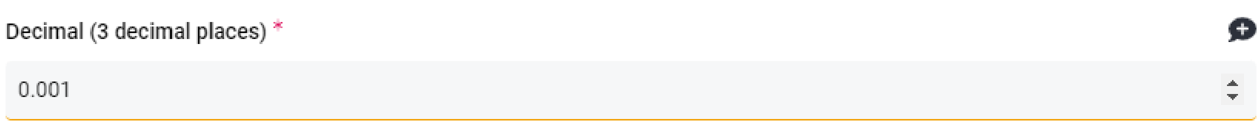
We've enhanced our form functionality to now toggle field visibility based on group membership, streamlining configuration for complex workflows. For instance, while a standard user views survey questions, an administrator might also access sections for submission evaluation. This serves two main purposes:

1. Simplifying configuration by reducing the need for multiple forms.
2. Consolidating action options for higher-permission users, with administrator fields/sections controlled by group permissions.

A new decimal field type

Configuration Required

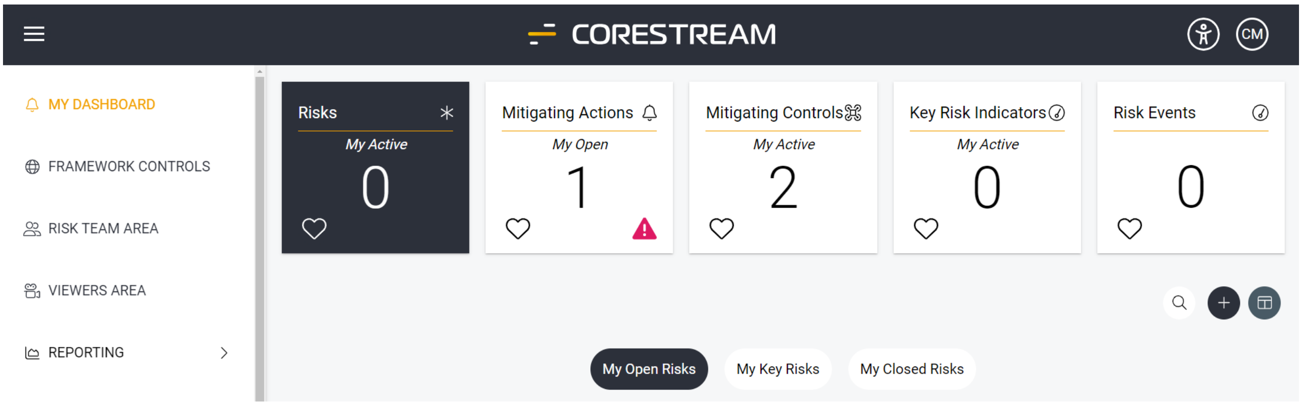
Previously, we used text fields for decimal values, lacking controls to enforce correct input format. Now, we've introduced decimal fields, similar to number fields but with configurable decimal places. Users are blocked from inputting text and can adjust the value using a scroll wheel.

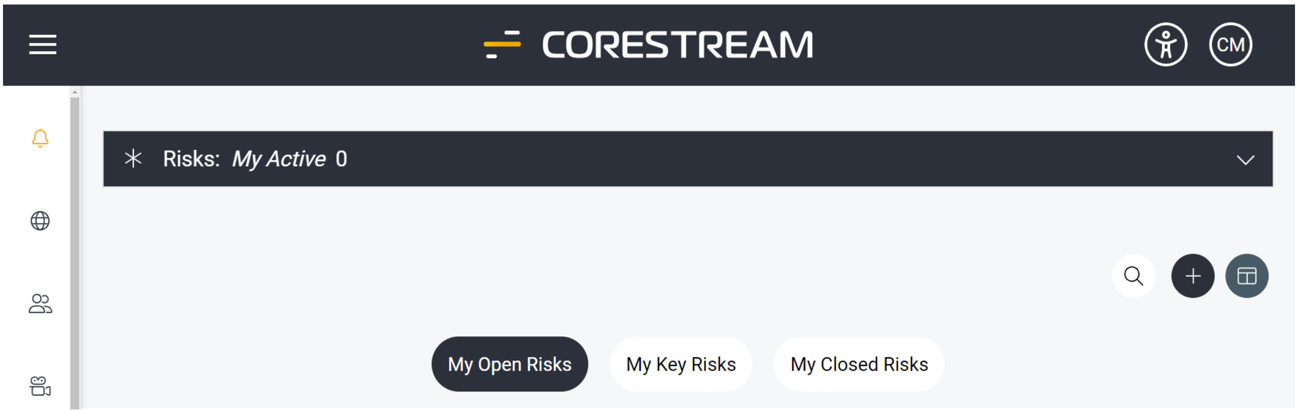


Improved logic when My Dashboard tiles switch to dropdowns

Automatically Added

To ensure optimal user experience across various devices and screen sizes, we dynamically adapt all of our components to the available space. Recently, it was reported that some My Dashboard components were occupying too much screen space on certain sizes, leaving only a few grid rows visible. We've fine-tuned the logic to seamlessly switch between full and dropdown views for tiles, maintaining an excellent navigation experience within grids.

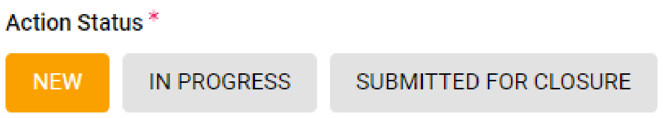


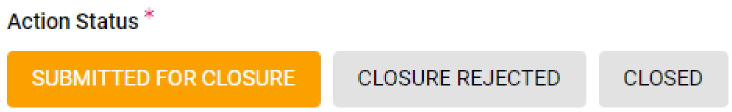


Conditional display of choice/button field values

Configuration Required

Before version 2.7, we could permanently exclude certain options from a Choice field on a form. However, we can now conditionally include or exclude specific values based on other properties in the form. This feature is particularly useful for Status fields. For instance, in a Risk form viewing associated Actions, we can display each Action's status within the sub-form and progress them through their workflow without the need to save the Risk at each stage.

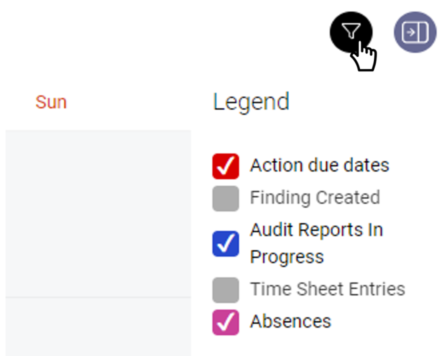




Improvements to Calendar components

Configuration Required

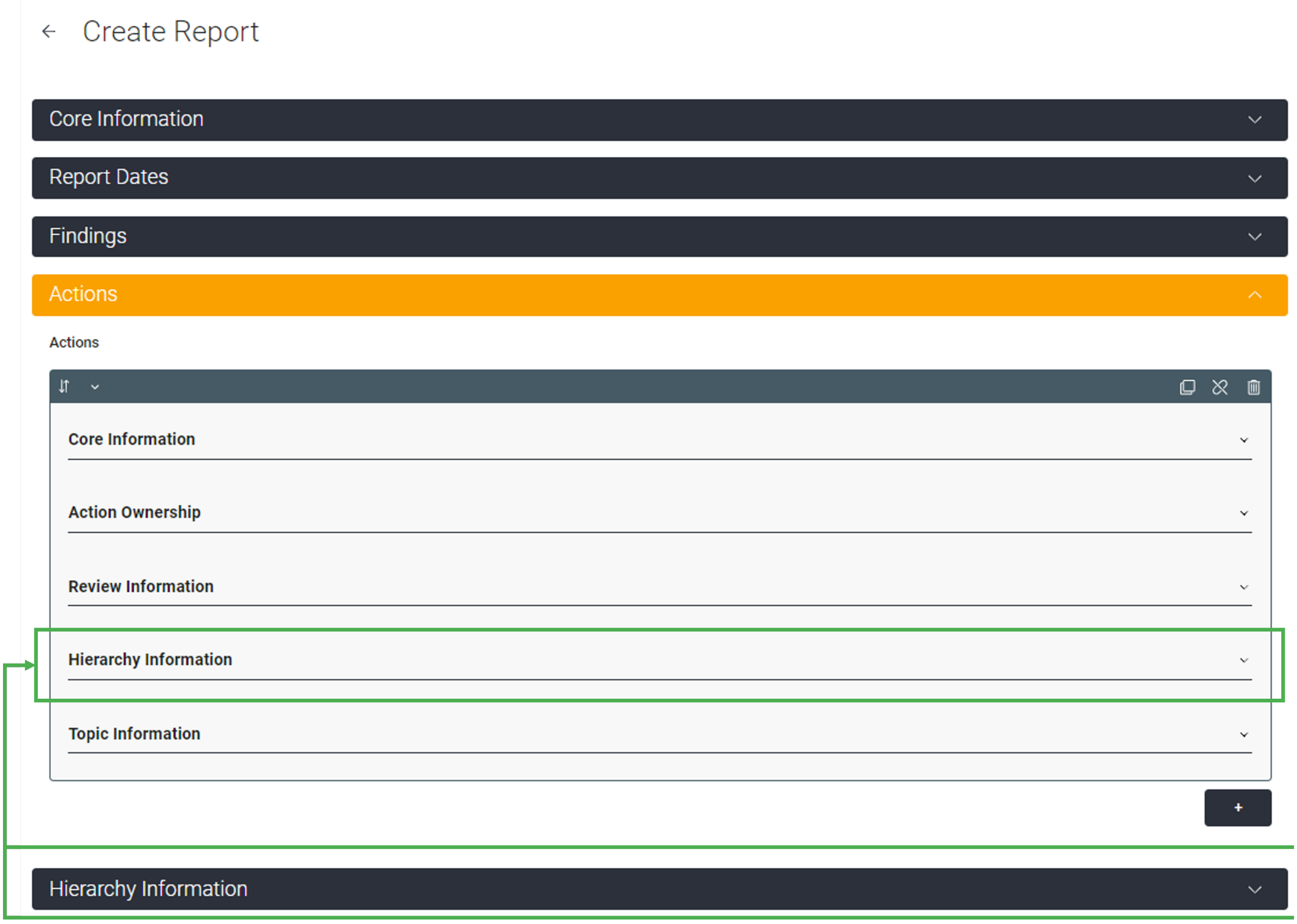
In version 2.7, we've made several enhancements to the Calendar components. One notable improvement is the ability to apply filters, similar to those used in dashboards or charts. Additionally, we've simplified the legend items into checkboxes for easy inclusion/exclusion of specific content types. Your selections will be saved in your personalised settings, so when you return to the calendar, your preferences will be retained.



Defaulting fields in sub form repeaters to fields in the main form

Configuration Required

You can now default fields in a sub form repeater from fields within the main form. In an Audit Report (main form) and Audit Action (sub form) scenario, while most fields in the Audit Action form require manual entry (Title, Description, Due Date, etc.), some can be conveniently defaulted, with the option to override as needed. For example, most Actions might default to the same Organisation level as the Report, but can be overridden in exceptional cases where input is required from another department.



End User Export Improvements - Favouriting Exports, Showing Only You Exports, Deleting Exports

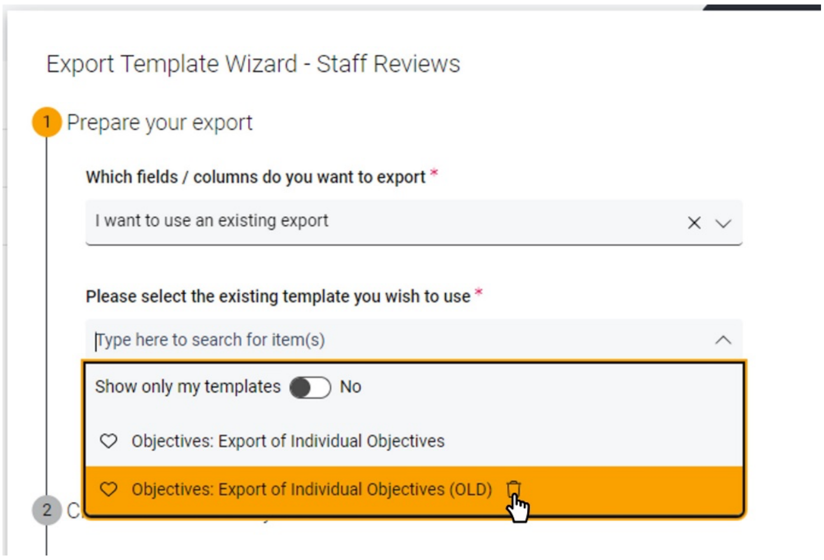
Automatically Added

We've enhanced our existing end-user export feature with the following capabilities:

Favouriting exports, allowing you to easily access them at the top of your view.

Filtering the list of exports to display only those created by you.

Deletion of exports created by you, or any exports with appropriate permissions.



Maintaining the customised order of sub form repeaters when exported into Word

Automatically Added

Although we support re-ordering of associated (sub form) content within our forms, the order was not maintained when exported via specific types of Word exports. We've addressed this issue, and now the ordering will be consistent across all exports.

Configuration Improvements

Additional enhancements to tool for exporting and importing configuration between web applications

Configuration Required

We've further improved a tool for swiftly transferring configurations between environments. This includes moving from starting point solutions and products to client sites that wish to integrate them. These enhancements prioritised refining merging logic, particularly for common objects like Actions, to minimise manual configuration required after import.

Automatic identification of efficiency improvements to overnight jobs

Automatically Added

Each release now enhances the Configuration Validator, automatically detecting and highlighting various issues and potential areas to optimise. For instance, it flags overnight jobs processing more records than necessary, such as those archived or closed that will never be processed by any workflow anyway.

Automated resolution of configuration issues

Automatically Added

To expedite configuration and reduce the risk of human error in extensive manual changes, we've begun automating resolutions where predefined solutions can be applied in bulk operations. For instance, on a client's site with 1000 user fields where the default sorting isn't set to order by First Name, we can instantly update the configuration of all fields with a single click, resolving this issue in bulk.

Issue Fixing

Fix to allow form button values containing commas

Automatically Added

We can display multiple choice fields in various formats (dropdowns, buttons, sliders, etc.). We've fixed an issue where choice fields couldn't be displayed as buttons if any selections contained commas. This is now supported.

Resolution of intermittent reporting dashboards issue

Automatically Added

In specific instances, typically during periods of poor connection, configuring a new chart on configurable reporting dashboards could lead to the screen becoming inaccessible if the dashboard was saved before the chart. Safeguards have now been implemented to prevent this issue from occurring.

Ability to clone multiple nested levels of sub form repeaters
Automatically Added

We now fully support Cloning within forms containing nested sub forms. For instance, consider a Programme containing multiple sub form Projects, which in turn may include a series of sub form Risks within them. Previously, cloning a Project in this setup wouldn't replicate the Risks, resulting in a cloned Project without Risks associated. With the update in version 2.7, cloning a Project will also clone all associated Risks, resulting in a complete copy of both the Project and its Risks. This saves significant time by eliminating the need for manually raising Project Risks from scratch.

Integrations

Integration with Control Risks
Configuration Required

The CoreStream Platform is now integrated with Control Risks Managed Screening Platform, further extending our Third Party Risk Management (TPRM) / Third Party Governance, Risk and Compliance (TPGRC) capability. This enables us to automatically submit due diligence requests and then receive the results back into CoreStream. This includes a wide range of checks including adverse media and sanctions. Enhanced Due Diligence requests are also included, meaning that clients can request further insight into a particular third party, including ownership checks and on site inspections.

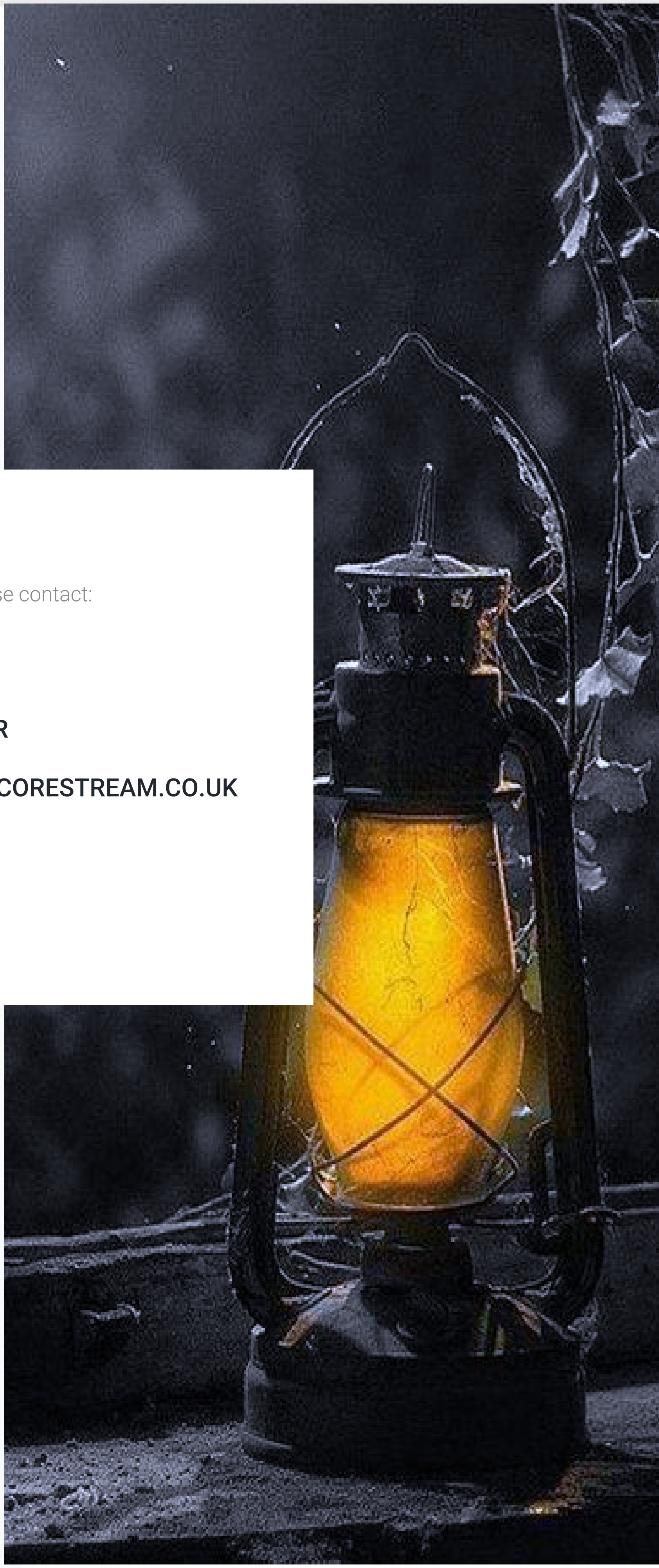
Integration with ServiceNow
Configuration Required

The CoreStream Platform is now integrated with ServiceNow, enabling the Platforms to synchronise data. This is primarily used in our Third Party GRC offering to inject requests for third party due diligence, though can be used in any workflow that involves both CoreStream and ServiceNow.

Integration with Coupa's spend management (Procurement) platform

Configuration Required

The CoreStream Platform now has an integration with Coupa, ingesting Third Party and Contract information into our Third Party GRC solution for clients who use Coupa as part of their application architecture. Requests are received into CoreStream and the results of due diligence and associated approval decisions are passed back to Coupa.



For more information please contact:

RICHARD EDDOLLS

PLATFORM DIRECTOR

RICHARD.EDDOLLS@CORESTREAM.CO.UK