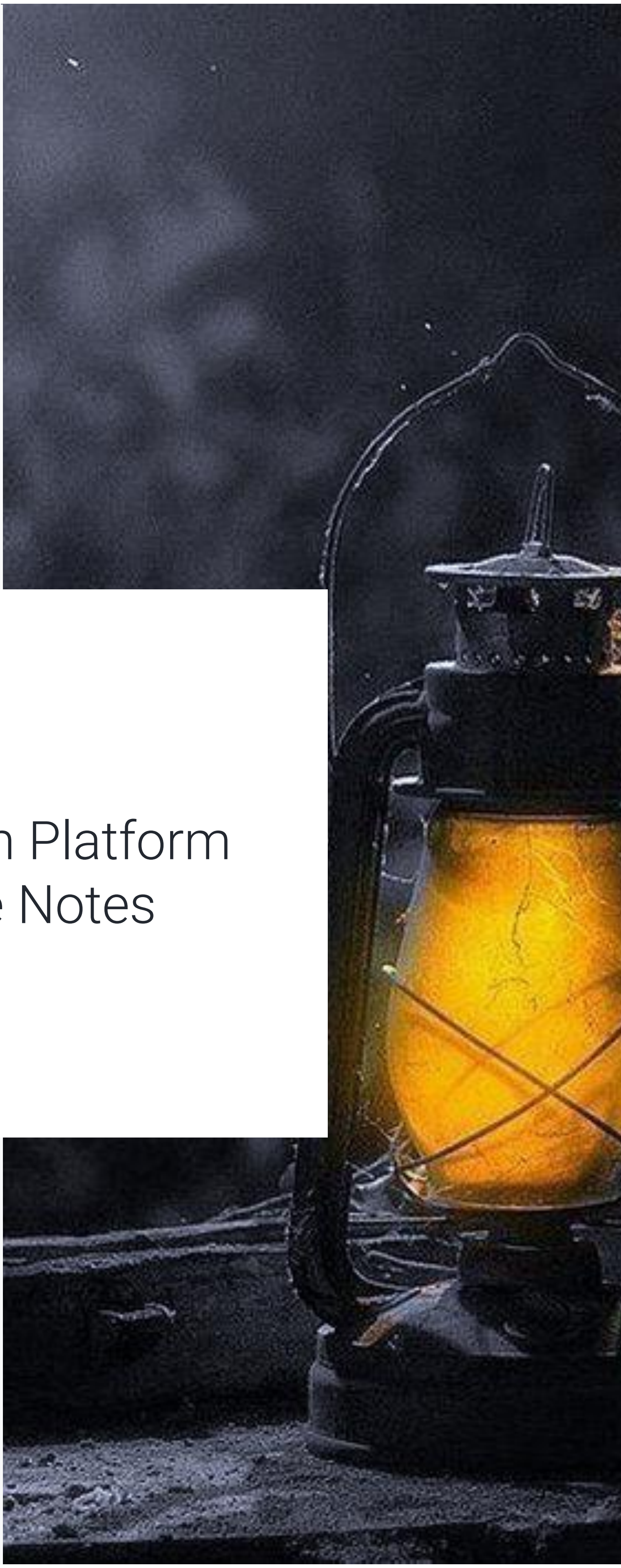

CORESTREAM

CoreStream Platform 2.8 Release Notes

01 Jun, 2024

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Document Purpose

This document provides a summary of the highlights of the CoreStream 2.8 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

Our flagship feature for this release is our new inbound email capability. Clients can 'copy CoreStream' on email exchanges that are then automatically filed against the item they relate to in CoreStream. This is particularly exciting for the clients who use us for case management or workflows that require input from external users such as regulators, auditors and suppliers. This feature can also be used to create new items, broadening the ways in which we can support the creation of content for areas such as freedom of information and subject access requests. This is one we are really excited to talk to clients about.

One of the key reasons clients adopt CoreStream is our intuitive interface, an aspect we constantly strive to improve. Our 2.8 release includes new features and changes aimed at reducing clicks and data input time. While the outputs of our Platform often grab headlines, it's the inputs that ensure accurate, up-to-date information.

The new feature we are expecting to have the largest impact is our consolidated hierarchy fields. We can now represent any number of levels in a single, searchable field meaning that we can consolidate the number of fields in our forms for things like organisational hierarchies, risk register structures and multi-level categorisations.

In addition to this, we have made improvements to our dual column mode in forms, added the ability to trigger actions from icons in our grid views, enabled charts to be drilled down into at the point of expanding them, and improved the clarity of our notifications when we have background workflows running.

It is important to recognise that these improvements are not all based on CoreStream observations alone. Our client and partner feedback continues to be pivotal to ensuring we prioritise the right features by truly understanding how our end users interact with CoreStream. Thank you to all of you who continue to provide this valuable input.

Thanks,
Rich

Release Notes

Strategic Features

Emailing users a link to unauthenticated form

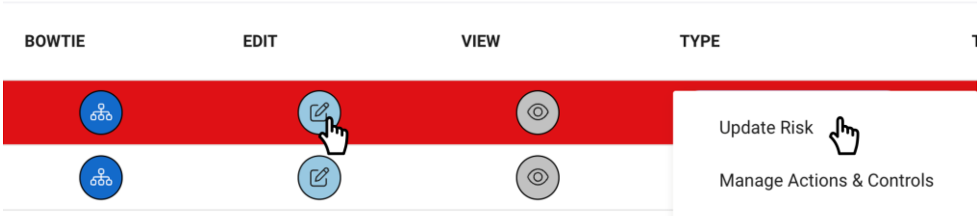
Configuration Required

In version 2.5, we introduced "anonymous" forms, allowing users to create content without logging in or authenticating. This feature was originally designed for situations like submitting complaints or reporting non-conformance anonymously.
This functionality quickly evolved to support general unauthenticated access, enabling users to create and manage specific data without an account. For example, a third-party supplier could complete a security questionnaire. To ensure unauthenticated users can re-access their records, we provide a link and require them to set a password.
In version 2.8, we added an option for users to provide an email address to receive a copy of the link, ensuring they don't lose access.

Action buttons on grid rows to immediately launch forms, process maps, risk bowties, etc.

Configuration Required

In version 2.8, we've introduced a new column type featuring a button that instantly triggers any action with a single click. For example, you might want to launch a bowtie from a risk, a process map from a process, or just a simple Edit Properties form. You can also choose whether to display the associated dropdown action option or have the button as the sole option.



Generate Word or PDF export and automatically add attachment

Configuration Required

Previously, Word/PDF exports could only be triggered by selecting the option for a specific row. Now, exports can be generated within workflows, allowing automatic triggers upon saving a form or scheduling in the background for multiple rows. This is especially useful for Policy Manager sites, ensuring an up-to-date version of the policy document is always attached to the policy record. As with any attachments in CoreStream, full version history is supported, allowing retrieval and review of older document iterations with a few clicks.

PDF attachments set to open in a browser before automatically downloading to your device

Configuration Required

By default, CoreStream attachments are downloaded when clicked by the end user, creating a local copy on their device. This can be suboptimal when local copies, which may become outdated, are stored across many users' devices. For example, a procedure document that changes over time may lead to users following outdated steps from a local copy. To address this, we have introduced a new read-only attachment field specifically for PDFs. It opens these attachments in a new browser tab instead of downloading them. It can also automatically convert Word, PowerPoint, and Excel attachments to PDFs before displaying them in the browser tab.

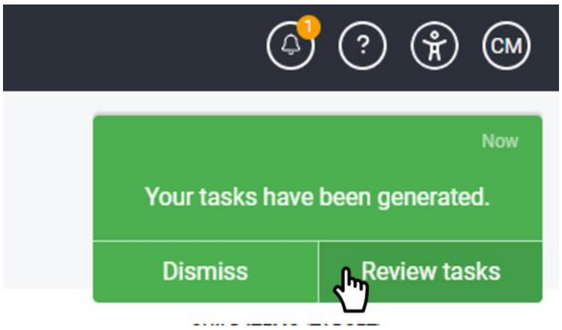
Core Features

Clearer notifications when long-running workflows have completed

Automatically Added

In CoreStream, saving a form can trigger complex workflows. These might include checking a potential business partner against a third-party risk management system or generating a large policy read request for many employees. We utilise background workflows so you can exit the form and continue working while these actions run behind the scenes.

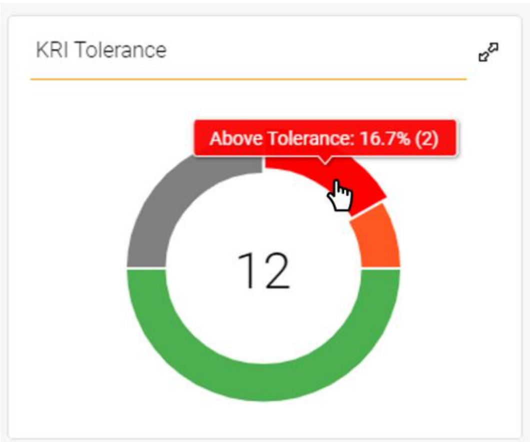
In version 2.8, we have improved notifications for these background workflows. The notifications are now clearer and allow you to jump to a specified view once the workflows are complete.



Selecting a specific segment of a dashboard chart now launches and filters

Automatically Added

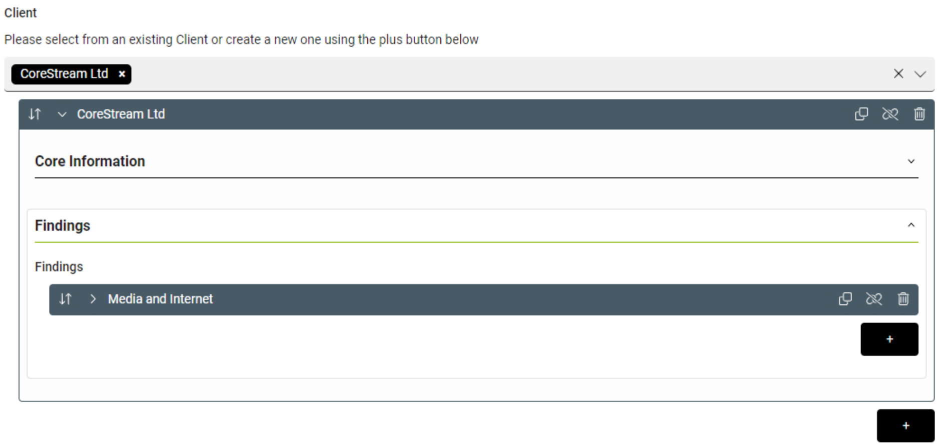
Previously, when using dashboard reporting, you needed to expand a chart before selecting a specific segment to filter the data. Now, with a single click, the dashboard will launch and filter the data immediately. This small change aims to simplify the user experience by minimising the number of clicks required.



Selecting from existing content and loading all of it's nested linked content

Automatically Added

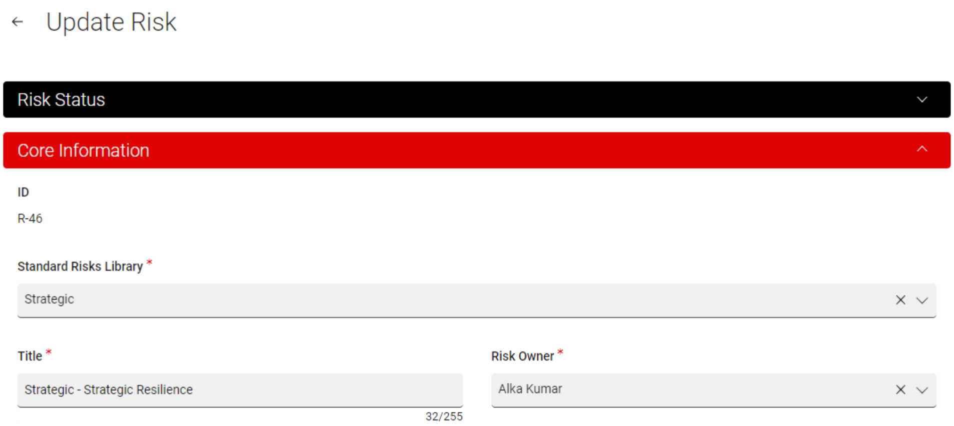
Previously, when selecting existing content via a sub-form repeater (e.g. linking to a client), the associated linked content (e.g. findings) did not load immediately and required a form save and reload. Now, this data loads immediately upon selecting the associated client, including all existing findings and any nested linked content within findings (e.g. actions).



Field-level control over two-column mode

Configuration Required

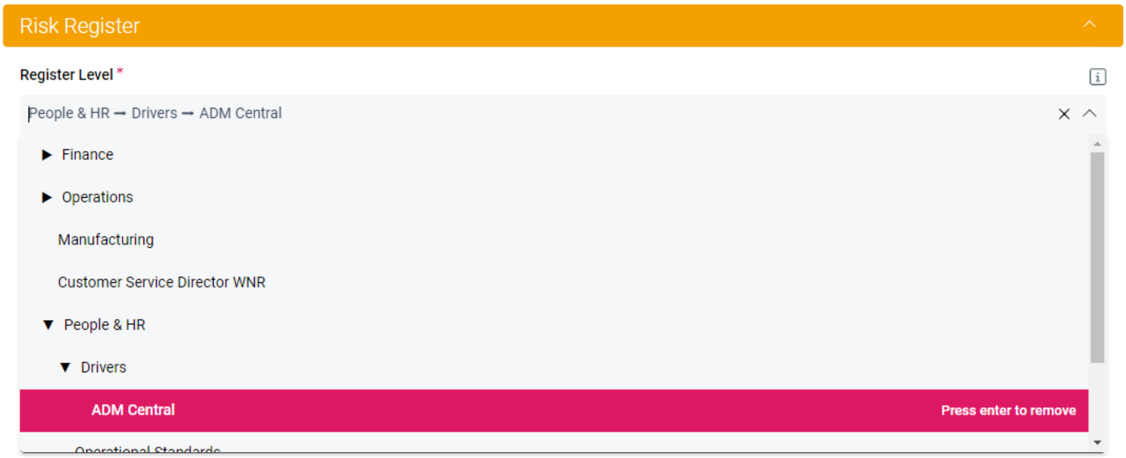
In version 2.6, we introduced section-level control over two-column mode (previously, it could only be set for the full form). In version 2.8, we've enhanced this by adding field-level control. This allows us to set certain field types to utilise the full width and others to align with columns of a similar height.



Consolidating multi-level hierarchies into a single field

Configuration Required

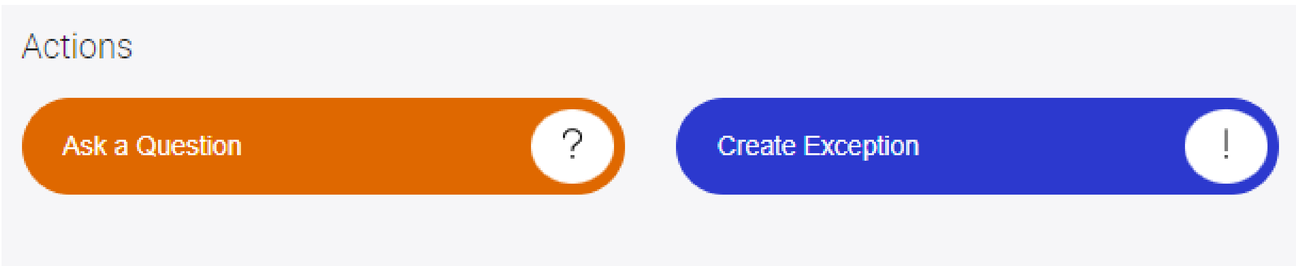
Previously, when associating content with hierarchy data, users had to navigate through multiple levels to find the one they required (e.g., selecting a risk register hierarchy to associate with a risk). Now, we've introduced a single field to represent the hierarchy, allowing you to search and find what you're looking for in one step, regardless of its level. This change simplifies the process and reduces form clutter. And don't worry, we're still populating the full hierarchy in the background for you.



Policy Manager improvement - creating associated content

Configuration Required

We've recently launched a 'website-style' Policy Manager interface for accessing content such as Policies and Standards. In version 2.8, we've enhanced the functionality for creating associated content from the policy page (e.g. asking a question or raising a non-conformance). This improvement automatically links the new content to the policy being read and populates any required associated fields.



Making incomplete mandatory comments more obvious to users

Automatically Added

When saving with incomplete mandatory fields, we display an interactive list in the side panel showing all fields that require completion. If a comments field is one of these, clicking it will open the comments in the side panel. If the only incomplete field is comments, we now automatically jump straight to the comments in the side panel instead of showing the list.

Configuration Improvements

Small improvements to ChatGPT in forms

Configuration Required

We have improved the system by separating the text displayed on buttons from the text sent to ChatGPT. This allows us to provide additional context for ChatGPT, such as defining acronyms or using more generic language, without displaying unnecessary information to users who already understand the acronyms/use company specific language.

Issue Fixing

Date selector periodically displaying out of view

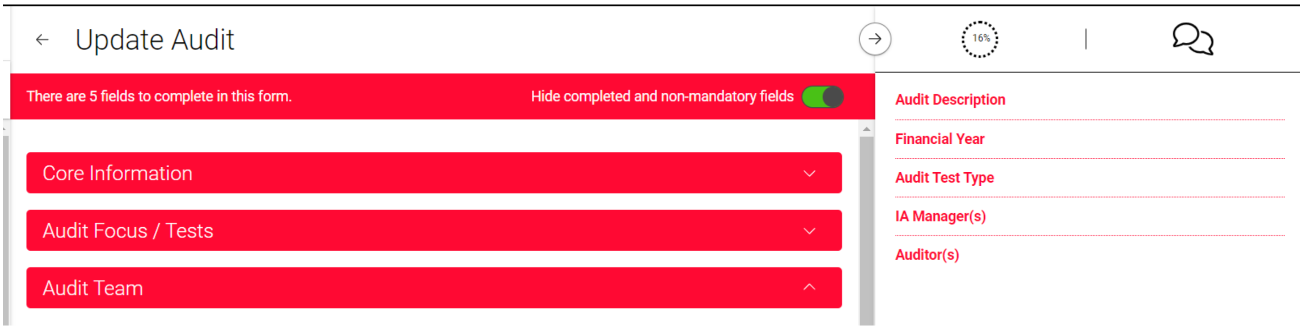
Automatically Added

We've fixed an intermittent issue with date selector fields where they would occasionally appear off-screen the first time they were selected. Now the screen will automatically scroll to bring the full calendar into view.

Hide completed and non-mandatory fields - minor UI improvement

Automatically Added

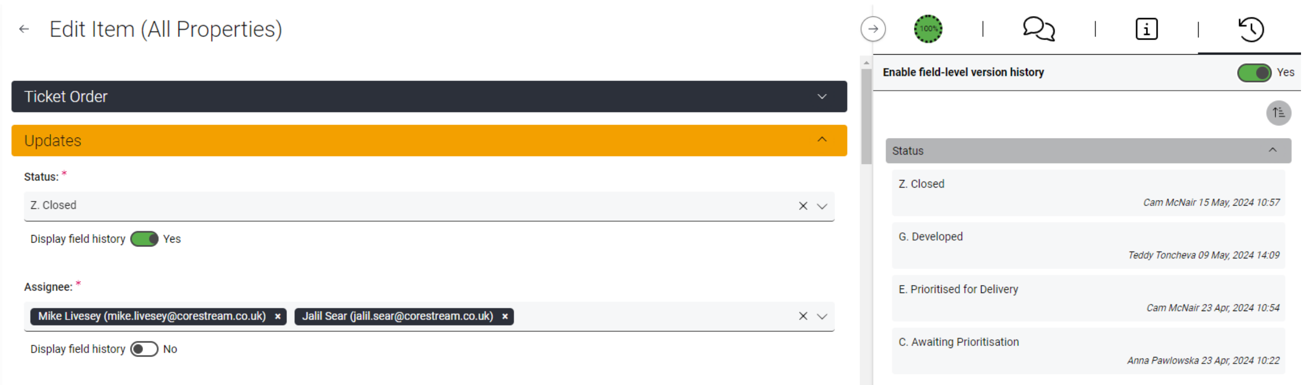
We recently introduced a feature that allows you to filter a form to show only incomplete mandatory fields when validation is on, making it easier to find and complete them. Previously, after completing the final mandatory field, the option to switch between all fields and incomplete mandatory ones disappeared, requiring you to save to view the full form again. Now, the switch remains visible, allowing you to review the full form before saving.



Review of regional settings and associated fixes

Automatically Added

As we add new features and enhance existing ones, we continually review to ensure support for regional settings like language and time zones. In our most recent review, we identified and resolved two issues in version 2.8: the email logger timestamp, which was off by 1 hour in some time zones, and the field-level version history timestamp.



Integrations

Capture emails as attachments within CoreStream

Configuration Required

Our clients can now send emails with a dedicated mailbox in the recipients list, allowing records to be created or updated within their CoreStream platform. This flexible feature supports a variety of configurations. For instance, a legal team can send emails about a specific case logged in their CoreStream legal register, knowing the emails will be added to the system with relevant metadata and tagged to the correct case. Alternatively, an email requesting a specific action can trigger the creation of a new action in the CoreStream action manager. And this is by no means an exhaustive list!

Technical

Adding pagination to API Exports of large datasets

Configuration Required

A number of our clients use our API Exports functionality to export data from their CoreStream site and use that data elsewhere (for example for reporting in Power BI). As the amount of data we're storing for our clients increases over time (in particular the version history data) it becomes a large and resource-intensive task to export all rows from some of our larger history tables.

Rather than restrict the data, for clients who really do want everything, we've added the pagination to the export results, with a configurable number of rows per page - allowing the end user to request each page of data.

For more information please contact:

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