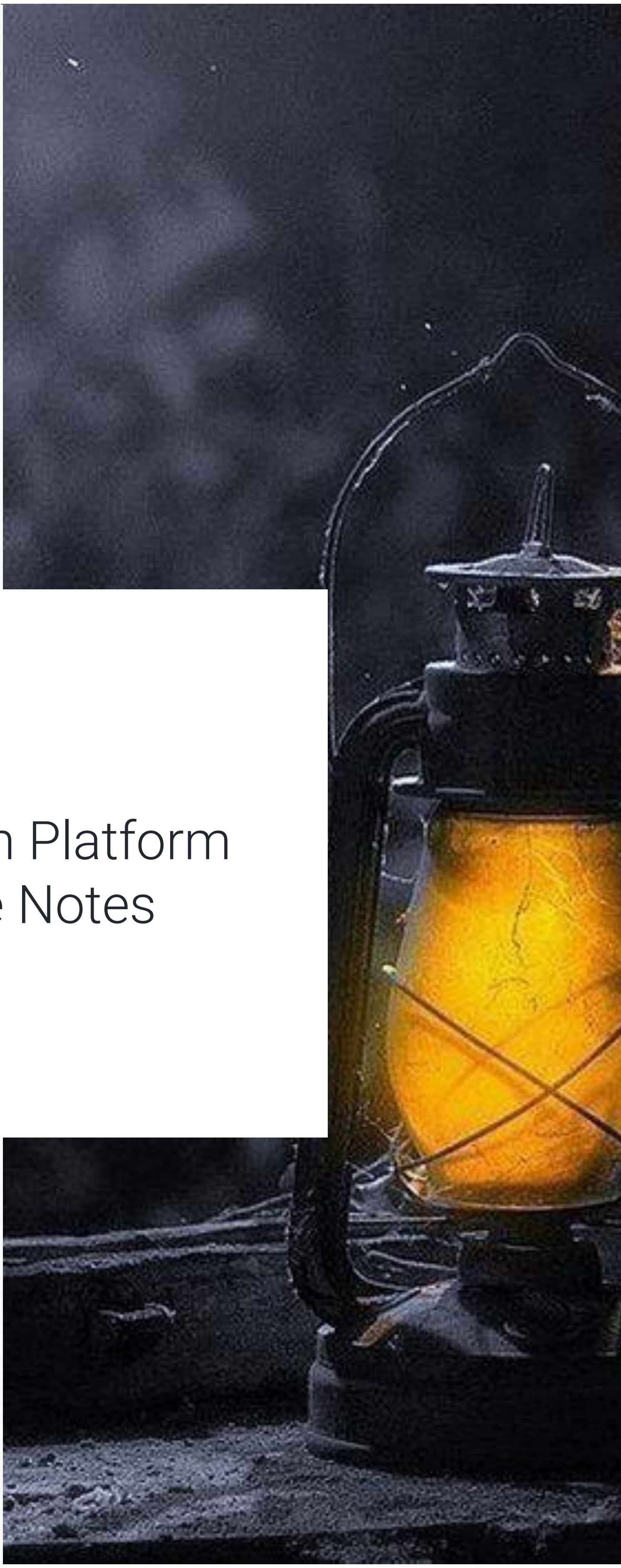
CORESTREAM

CoreStream Platform 2.9 Release Notes

01 Aug, 2024



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Document Purpose

This document provides a summary of the highlights of the CoreStream 2.9 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

It is difficult to choose which features to highlight in 2.9. Despite it being holiday season for a lot of us, we have been extremely busy shaping, scoping and delivering our release. And we have covered a lot of ground.

The CoreStream risk bowtie that was revamped earlier this year has now had additional features added so that users are able to add and edit content via the bow tie itself rather than using the underlying risk form to do so. We can even do this and support the many to many relationship structure, meaning the same action or control can be mitigating multiple causes or consequences.

Another feature focused typically on risk related requirements is the aggregation chart. CoreStream is now able to present risk data that has been reassessed according to the thresholds associated with the level it is being displayed. For instance, a £100k risk may be material when viewed at a project level but the impact typically needs to be readjusted when looking at the same risk at an organisation wide level.

2.9 also includes a feature that will help our support team respond to your queries even more quickly than they do today. We have the feature that allows us to mimic the permissions of a user profile so that we are able to view the same screens, data and action options as that user. We are conscious of the security implications here, so this is very much an admin only feature!

Finally, one of our perennial objectives at CoreStream is to make lives easier. We have introduced a number of form features (instant validation, improvements to our consolidated hierarchy fields) and wider improvements (highlighting the row you just edited, direct links from summary emails) to help us continue along this journey. As ever, client and partner feedback are extremely valuable in this endeavor so please do keep it coming.

Thanks,
Rich

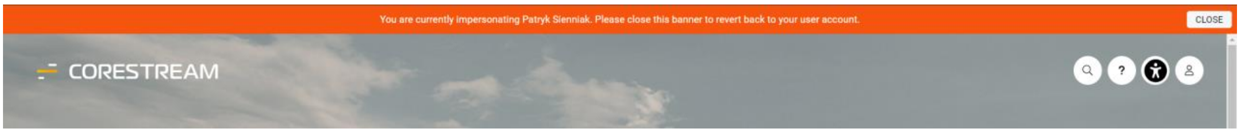
Release Notes

Strategic Features

CoreStream Support mimicking signing in of other users to assist with issue resolution

Configuration Required

We've added a new tool to our Support team's toolkit: the ability to mimic signing in as any user. While our Support team already has administrative access, this feature helps them bypass complex permission layers to see exactly what users experience, making troubleshooting more efficient. We plan to further develop this feature in a future release, with the goal of eventually making it available to our clients' first-line support teams.

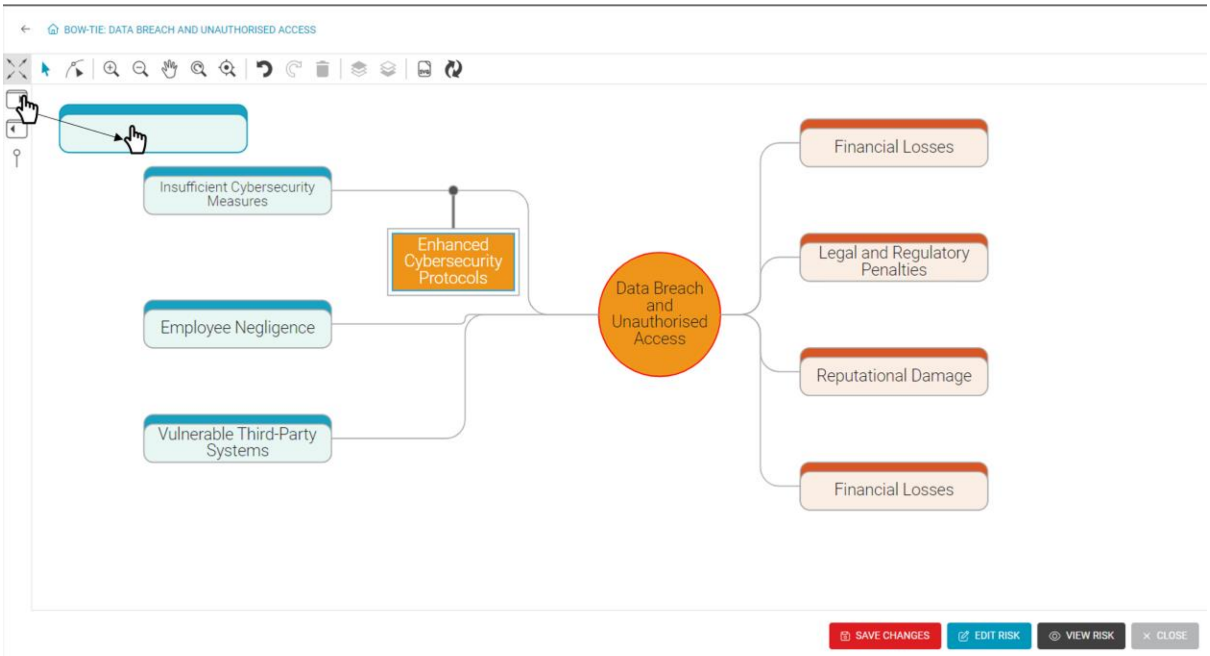


New ways to add data to the Bowtie

Automatically Added

In the first iteration of our Risk Bowtie diagram, users could visualise their Risk in Bowtie form, edit it via the standard edit form, and have the Bowtie automatically refresh with their changes.

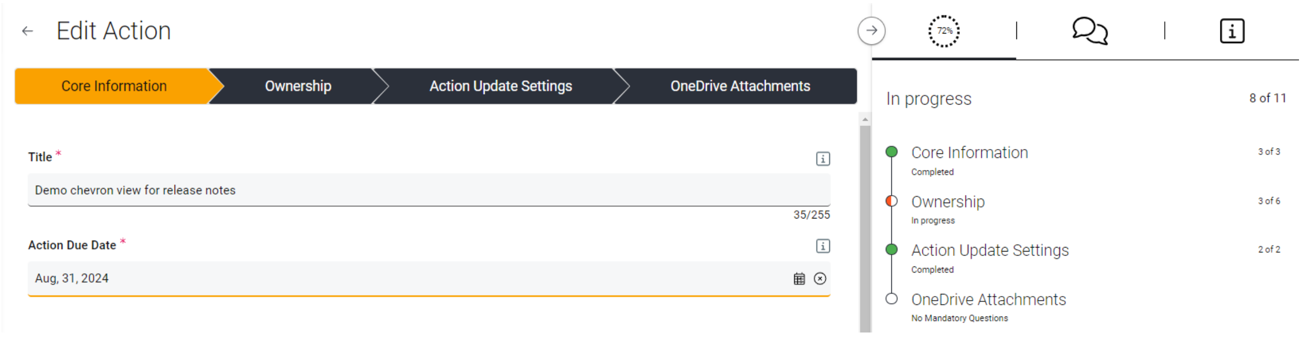
In the second version, we've introduced a bit more flexibility and some enhanced useability features. You can now drag and drop Causes, Consequences, and Controls onto the diagram, rename them, and 'beautify' the diagram, all without opening the form. Your data is automatically created in the Risk with all necessary associations added, and the ability to save changes from within the Bowtie feature. For those wanting to add more detail, you can still open the edit form and continue as you could in version one.



An alternative forms layout for less scrolling

Configuration Required

We've added an optional form view that replaces sections with tabs or chevrons. This is useful for clients who want to reduce scrolling and enforce a more ordered flow through a form and is particularly effective for forms with a large number of fields.

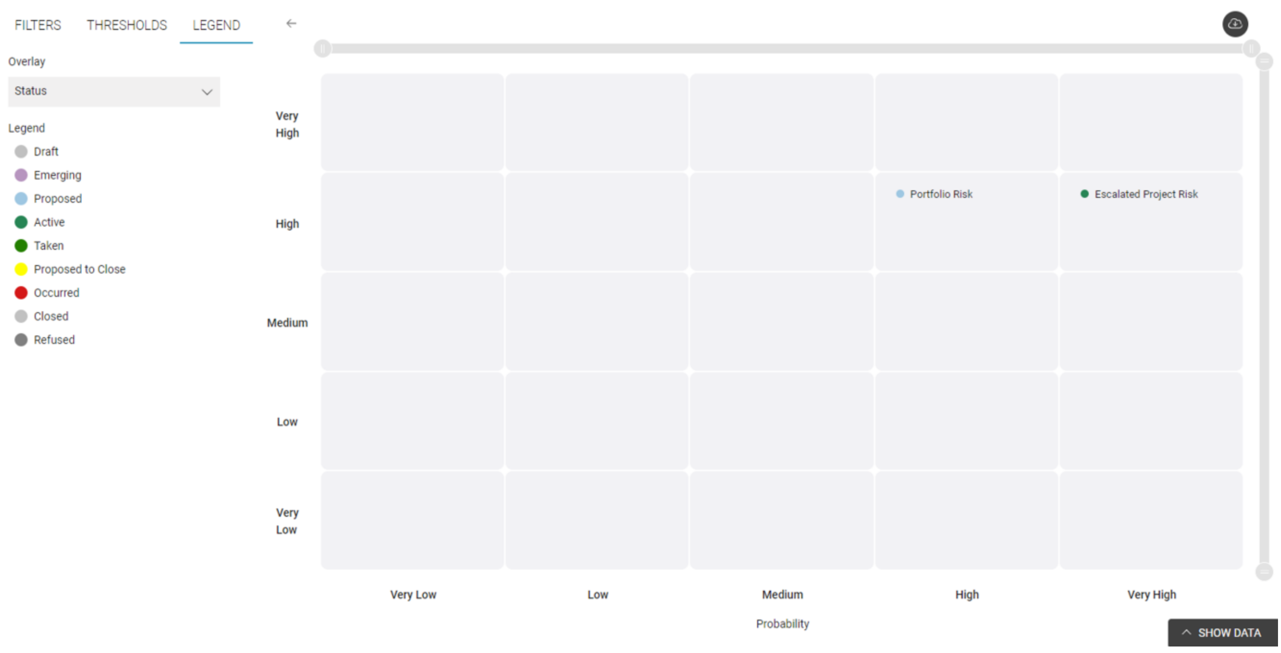


Custom chart of Risk aggregation and reassessment

Configuration Required

While our standard heatmap is an excellent tool for visualising risks on a given Risk Register, it doesn't always provide the complete view some clients are seeking. For instance, it doesn't easily allow Risk/Register Owners to view both their own risks and those escalated to their register while also reassessing the escalated risks' impact. For example, a risk on a Project register might initially have a high-cost impact, but when reassessed relative to the overall Portfolio, its impact could be much lower.

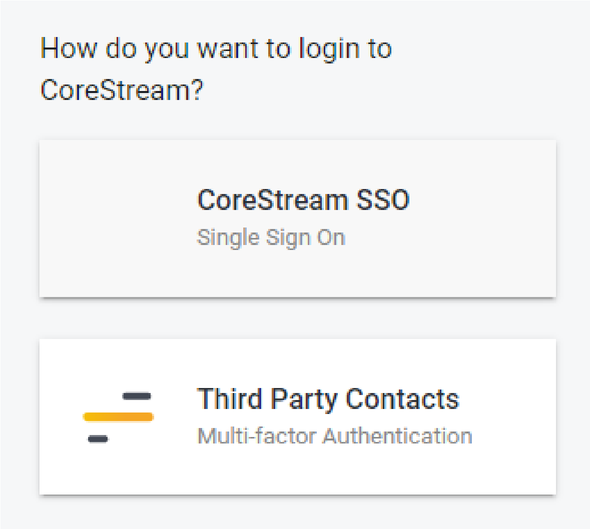
To address these challenges, we've developed a custom Risk aggregation chart. This chart not only allows Risk Owners to view both their own risks and escalated risks but also facilitates reassessment of the escalated risks' impact across different registers or portfolios.



Configurable wording for MFA button on the authentication page

Configuration Required

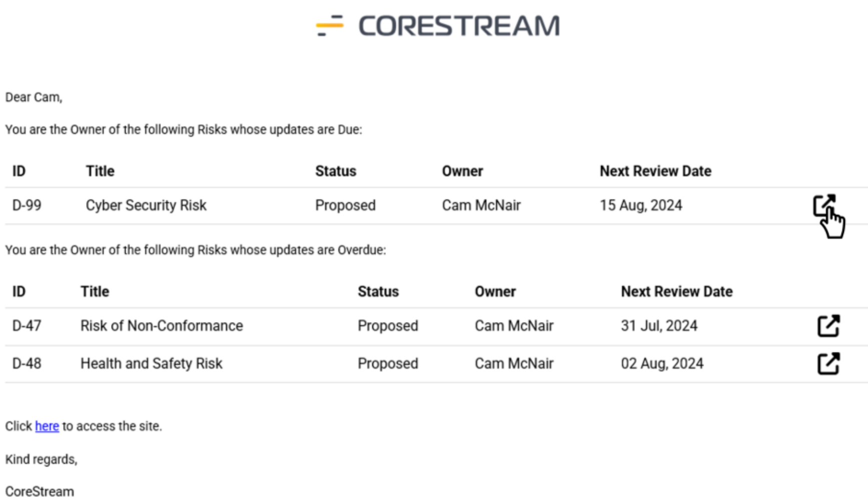
It was brought to our attention that the default wording of the MFA button on some client sites might not be as clear as it could be, given the specific use cases. For instance, in a Third Party Risk Management (TPRM) system where all company employees use SSO and third-party users access via MFA, it might be more appropriate to reword the button to something like "Third Party Contacts."



Adding direct links to summary emails

Configuration Required

Before version 2.9, users could only be directly linked from an email to a grid or form on the site if the email was sent instantly. Summary emails, which are often preferred as they consolidate multiple records into a single message, lacked this functionality.
Now, we've added the ability to configure a dedicated link for each row in the tables within a summary email, allowing users to go directly to the relevant section on the site. This enhancement makes it easier for users to find and manage their data within CoreStream more efficiently.



CORESTREAM

Dear Cam,

You are the Owner of the following Risks whose updates are Due:

ID	Title	Status	Owner	Next Review Date	
D-99	Cyber Security Risk	Proposed	Cam McNair	15 Aug, 2024	

You are the Owner of the following Risks whose updates are Overdue:

ID	Title	Status	Owner	Next Review Date	
D-47	Risk of Non-Conformance	Proposed	Cam McNair	31 Jul, 2024	
D-48	Health and Safety Risk	Proposed	Cam McNair	02 Aug, 2024	

Click here to access the site.

Kind regards,

CoreStream

Core Features

Instant feedback when inputting invalid data into fields that require specific format

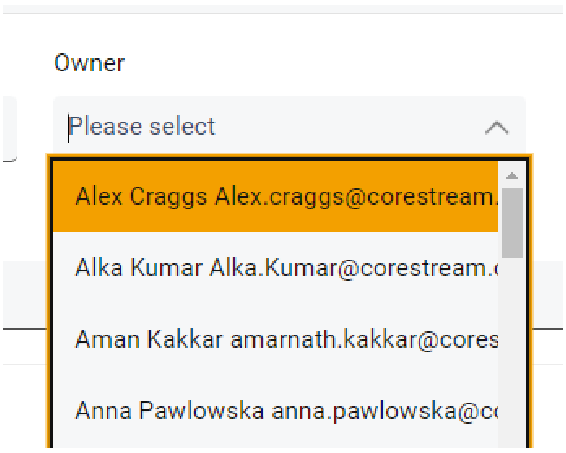
Configuration Required

It has always been possible to restrict input in certain fields based on pre-defined criteria, such as preventing an email address field from having an invalid format. Previously, users were only warned about such issues when they attempted to save the form. Now, users are notified as soon as they move out of the field if the input is invalid. This custom validation, configurable using standard regular expressions (regex), applies regardless of whether the field is required.

Custom sorting on reporting filters

Configuration Required

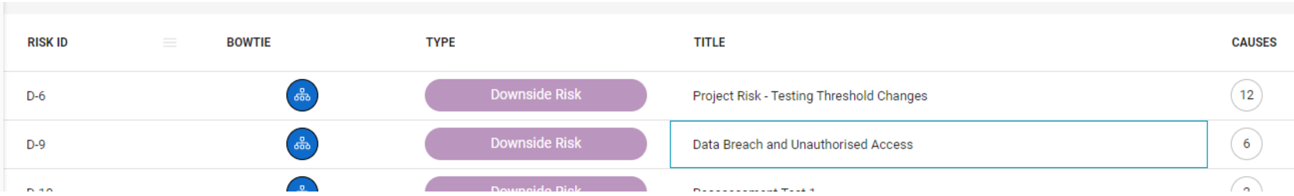
Previously, customising the sorting of reporting filters was not possible. This functionality has now been added, allowing filters to be sorted according to your preferences. For example, you can display the most recently modified records at the top or arrange them alphabetically by title.



Highlighting the grid row you have just finished editing

Automatically Added

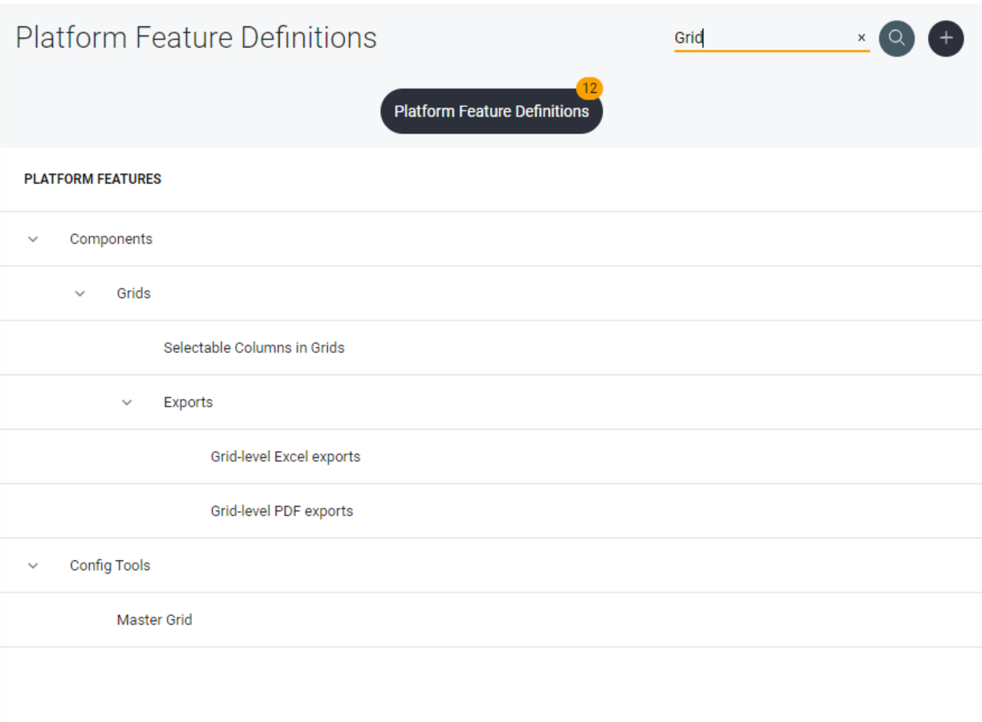
It may seem like a small change, but we believe you'll find it very useful, especially if you use CoreStream frequently. When you save a form after editing a row, it's helpful to see where that row is in the grid instead of being taken back to the top, particularly if you plan to edit the next item in the list. Now, the row and cell will be highlighted based on where you initially clicked to launch the form.



Making searching Treeviews more straightforward

Automatically Added

In 2.9, we've improved the global and column-specific search functions on our Treeviews. Previously, you'd be searching only the top level, which is not very useful if you're looking for something in a lower level and are not sure where to find it. Now searching will span all levels and automatically expand the nodes that return a match.



Filtering of data displayed in Consolidated Hierarchy fields

Configuration Required

The new CoreStream feature, which enables the display and selection of hierarchical data in a single field, has been enhanced to filter entries based on values most relevant to each user. The field now supports presenting data starting at different hierarchy levels. For example, a user with access to level 3 and level 5 items can view both as top-level items, which can then be expanded to see lower levels. This improvement makes selecting hierarchical data more efficient for end users.

Tree view component with multiple level starting points

Configuration Required

The CoreStream tree view previously would display an entire hierarchy to a user. The extension of this feature allows for the tree view to have multiple starting point levels and display only that level of data and below. For example, a user with permissions to view the hierarchy of a level 3 item and below and a level 5 item and below would see both of these items as starting points that can then be expanded. This helps ensure we serve the right content to the right users in the most efficient way possible.

Formatting in Word Exports

Automatically Added

Exporting CoreStream data into Word is a popular feature among our clients - we're even using it ourselves now to produce these release notes! However, a common challenge has been the clash between the formatting of text from our rich text editors and the formatting set in Word exports - raising the question of which should take priority. Our approach is that "it depends," so we've taken steps to optimise how formatting is applied.
In version 2.9, we've updated the table formatting. Now, any data coming from a rich text editor in CoreStream into a data table in Word will respect the table cell formatting from the Word export while maintaining its own text formatting (e.g., bullet points, paragraphs) from CoreStream.

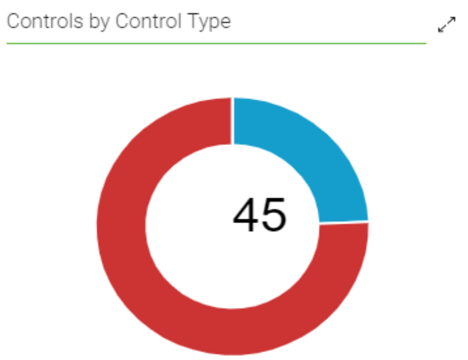
Configuration Improvements

Issue Fixing

Fix for intermittent pie chart visual issue solved

Automatically Added

We were receiving intermittent reports of pie chart counts appearing off-centre when certain filter combinations were applied. A fix for this issue has been introduced in version 2.9.



Small fix to ensure Client logo shows in Anonymous/Unauthenticated Forms

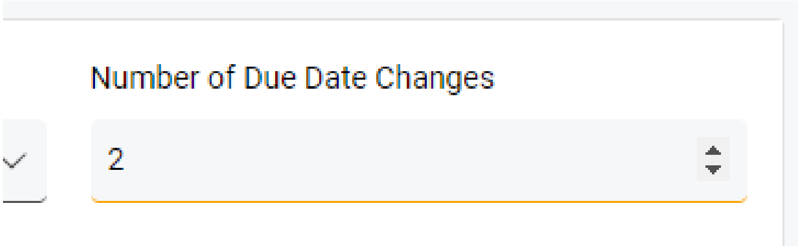
Automatically Added

In some cases, anonymous or unauthenticated users could access a form without a header logo. We've implemented a small fix to prevent this.

Added support for number field filters on Charts and Dashboards

Configuration Required

Number fields, including currency and decimals, which were previously unsupported, can now be used as filters in Charts and Dashboards.



Integrations

Introduction of "throttling" settings to our integrations

Configuration Required

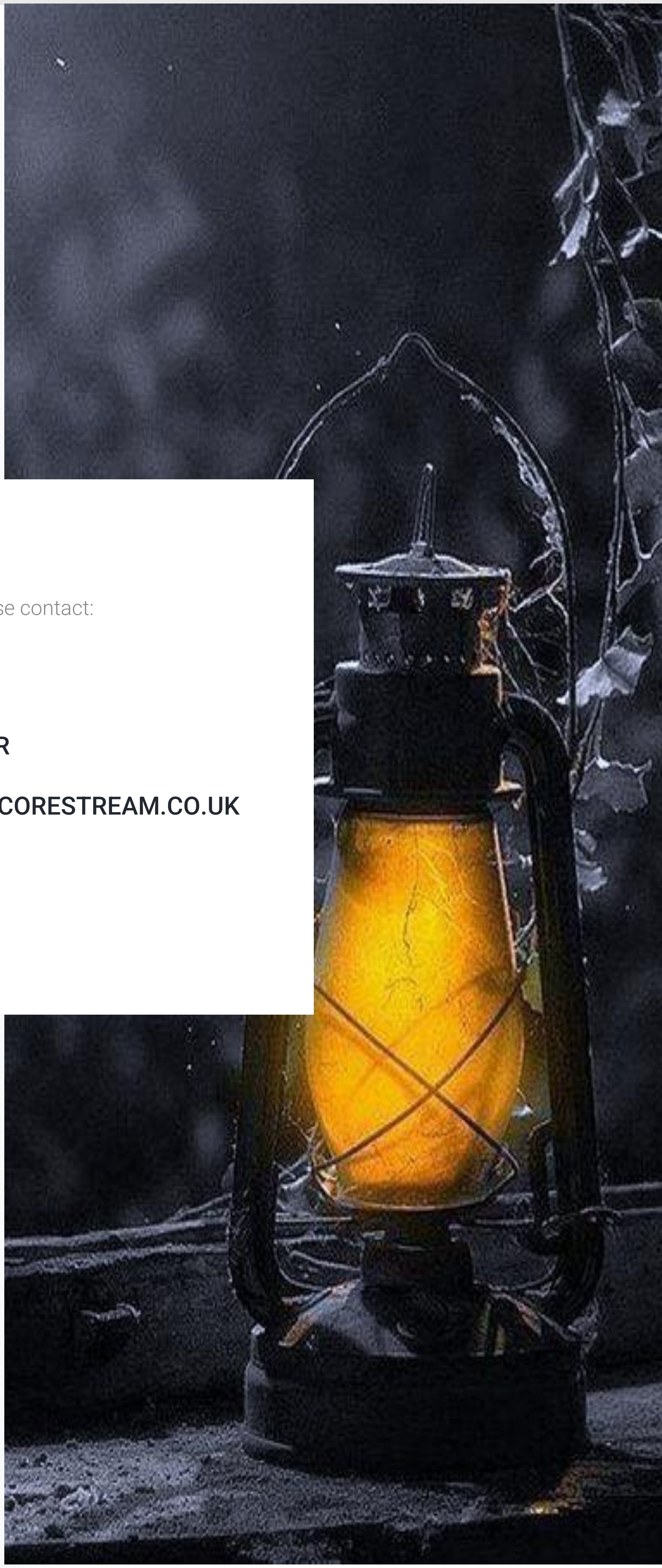
We've introduced a throttling option to our APIs to limit the number of requests clients (individual users or automated systems) can make within a certain timeframe. This prevents the API server from being overwhelmed by too many requests, which could cause performance issues or downtime. Where required, throttling helps CoreStream maintain a high quality of service, especially when high request volumes are expected.

Technical

Switching off background services

Configuration Required

There is now a switch within the platform settings that, when activated, prevents the running of any background services (e.g. email scans, data synchronisation services, integrations). This is useful for periods when specific sites (e.g. User Acceptance Testing) are not in use, preventing unnecessary resource consumption on recurring jobs that are not currently required.



For more information please contact:

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