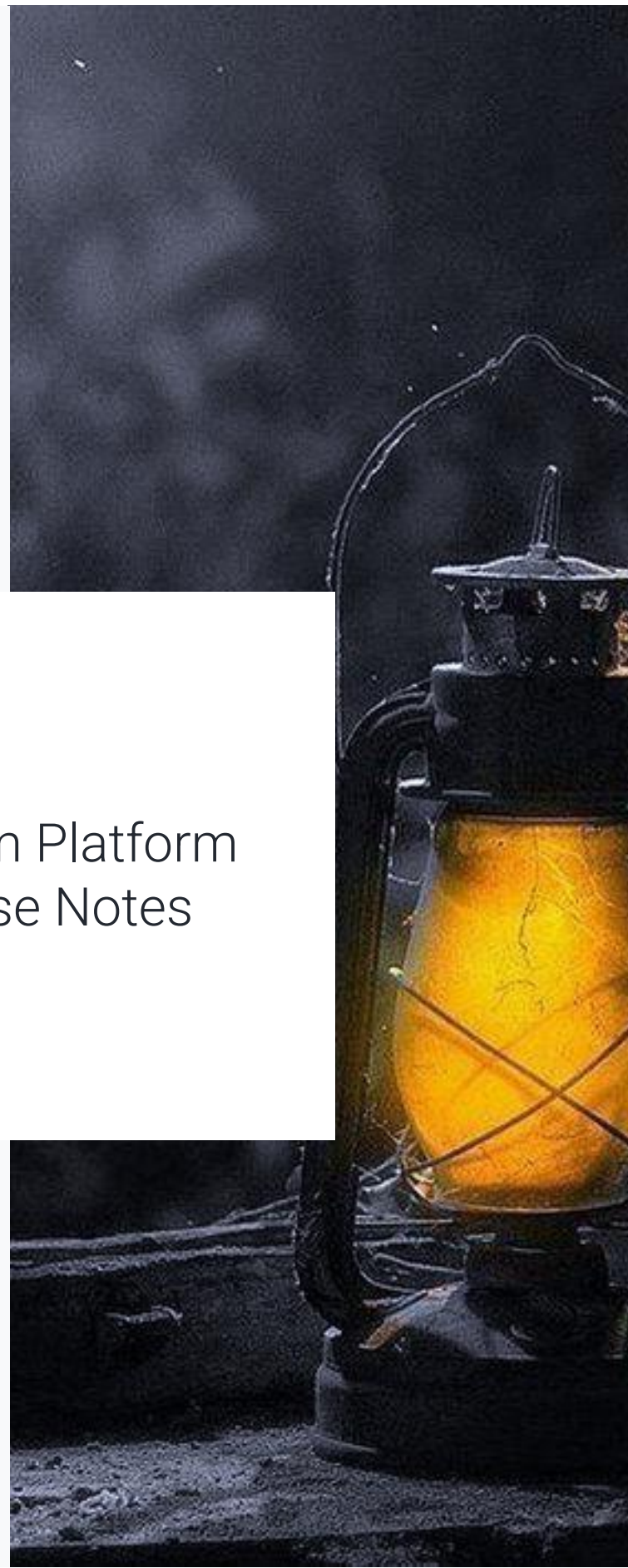


CORESTREAM

CoreStream Platform 2.10 Release Notes

6 Jan, 2025



Document Purpose

This document provides a summary of the highlights of the CoreStream 2.10 release. Major Platform releases are finalized 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 summarizes the key user stories and issue fixes, categorized 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 always a challenge to decide which features to highlight in a release, but version 2.10 brings a range of updates designed to enhance usability, improve risk management, and streamline workflows. Over the past few months, the team has worked tirelessly to deliver these improvements, and we've covered significant ground.

One of the standout features is the introduction of enhancements to the risk escalation process. By combining a simplified choice field with hierarchy visibility, we've made it much easier to manage escalations across complex structures. Additionally, risk aggregation charts now offer multi-layered legends, combining icons and colors to help users track trends and risk changes more effectively.

The Risk Bowtie continues to evolve with new right-click properties providing deeper insights into actions and controls, while the introduction of color-coded risks brings immediate clarity to risk severity. For those leveraging our dashboards, a new global filter consolidates multi-level hierarchies into a tree-structured dropdown, making it easier than ever to navigate and apply filters across charts.

We've also made significant improvements to forms, including a new date range selector that reduces clicks and ensures data accuracy. Smaller but impactful changes, like expanded sub-sections in forms and improved treeview permissions, reflect our commitment to making everyday tasks more efficient.

As always, we remain focused on continuous improvement, and your feedback plays a vital role in shaping our platform. We're proud of what we've accomplished with 2.10, and we look forward to hearing how these updates make a difference for you.

Thanks,
Rich

Release Notes

Strategic Features

Internal reference fields within forms

Configuration Required

For risk escalation, we often need an additional field to specify the hierarchy level for escalation, in addition to capturing the risk register hierarchy where a risk resides. Previously, we managed this either with a choice field to select a 'level' (i.e. 1, 2, 3, etc.) or a duplicated hierarchy to choose the escalated level.

This new field combines both approaches: it allows selecting the escalation "level" in a simple choice field while displaying the titles of the relevant register hierarchy.

The screenshot shows two form fields. The first is 'Risk Owner *' with a tooltip that says 'Please ensure you have typed a minimum of 3 characters to load options for this field'. The input contains 'Cam McNair (Cam.McNair@corestream.co.uk)'. Below it is a dropdown menu with options: 'Executive', 'Digital Transformation Portfolio' (highlighted with a hand cursor), and 'Cloud Migration Programme'. The second field is '(Sub) Project' with a tooltip. It shows a breadcrumb path: 'Executive → Digital Transformation Portfolio → Cloud Migration Programme → Data Centre Decommissioning Project'.

Legend updates to risk aggregation and reassessment chart

Configuration Required

The chart legend has been upgraded to display multiple legends simultaneously, either with distinct icons/colors or a combination. For example, you can show the risk trend (up, down, or stable) with an arrow icon, while using the arrow's color to represent the risk's change level.



Core Features

Support for Chinese characters within Word exports

Automatically Added

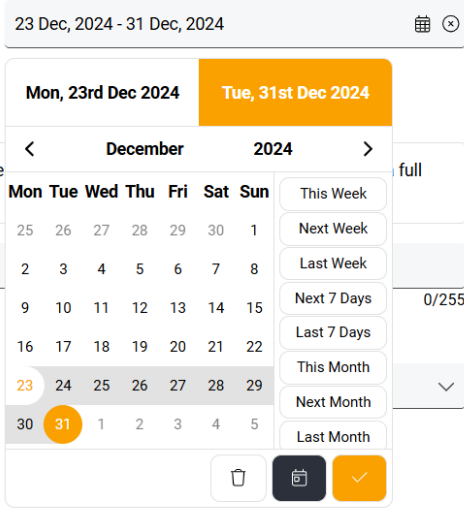
While we supported adding and displaying Chinese characters across the site, a gap was identified when exporting text fields with Chinese characters into Word documents. This issue is now fixed.

New date range selector field

Configuration Required

We've added a date range selector to our forms, replacing separate start and end date fields with a single field. This saves space, reduces scrolling and clicks, and ensures the start date cannot be after the end date.

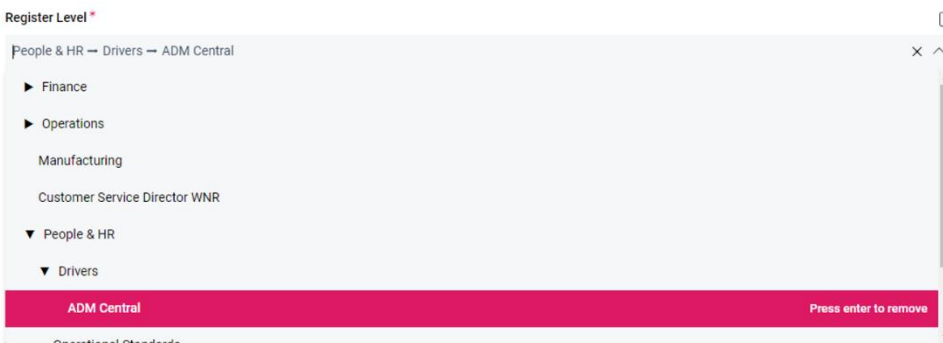
Holiday Dates *



Consolidating multi-level hierarchies into a single global filter

Configuration Required

In version 2.8, we introduced a field consolidating multi-level hierarchical data into a single dropdown. In version 2.10, we extended support for this field to global filters on reporting dashboards, replacing multiple dropdowns with a single, tree-structured dropdown. This allows users to quickly search and select across levels with just two clicks and then apply this filter to all charts on their dashboard.



Linked content on treeview hierarchies

Configuration Required

Building on recent improvements to our treeview component, we've introduced the ability to display linked content with conditional logic at each hierarchy level. For example, in a Risk Register hierarchy, the top level could display all risks associated with it and its sub-levels, or

only those originating at that level or escalated to it. To enable this, level-specific conditional logic can now be applied, ensuring flexibility and separation of rules between levels.

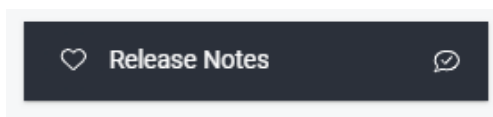
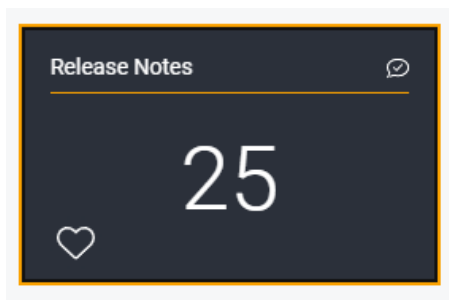
RISK REGISTER	LEVEL	LINKED RISKS
Executive	Level 1	1
Digital Transformation Portfolio	Level 2	18
Cloud Migration Programme	Level 3	29
Data Centre Decommissioning Project	Level 4	12

Minimized tile view for My Dashboard components

Configuration Required

While the default tile view on My Dashboard components is great for quickly displaying KPIs, some users value its ability to show multiple grids on one screen, with less emphasis on the KPI.

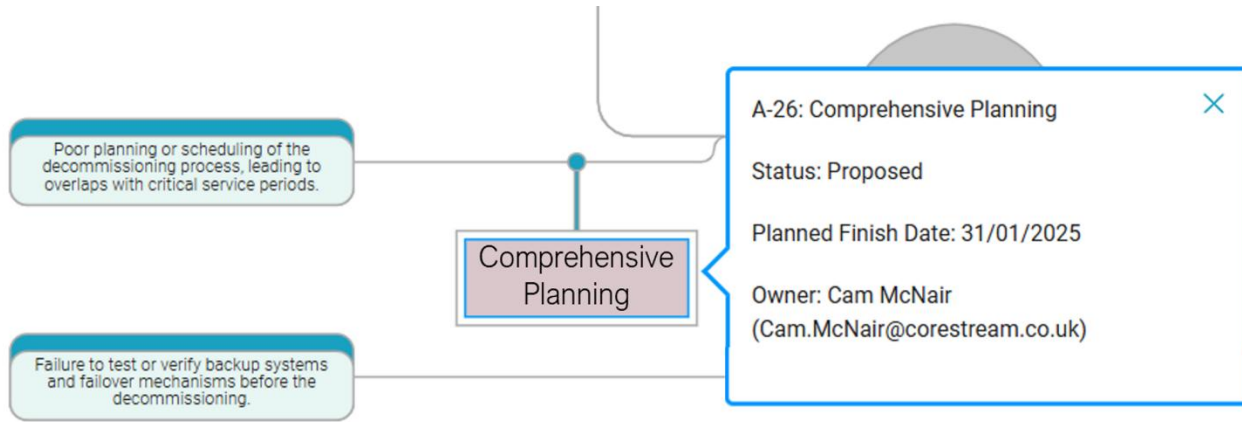
In version 2.10, we've introduced an alternative 'tab' view, which is more compact and omits the large KPI display. Additionally, reporting dashboards can now be associated with tiles, not just grids.



Displaying additional properties on the Risk Bowtie

Configuration Required

We've added additional right-click properties to the CoreStream risk bowtie, providing more information about Actions and Controls.



Color coding the Risk on a Risk Bowtie

Configuration Required

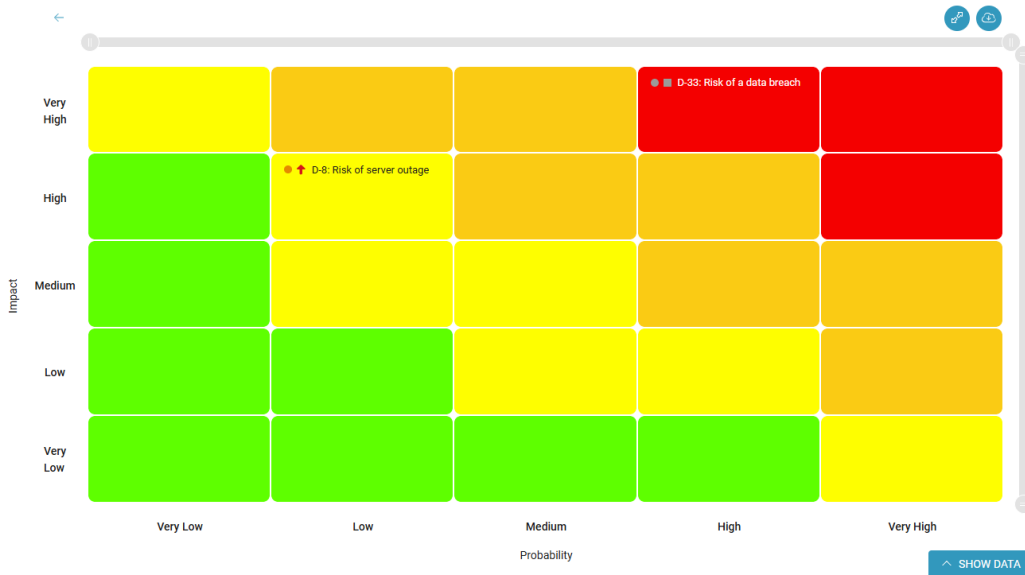
We can now color-code your Risks on a Bowtie diagram. For instance, using RAG colors, based on the Current Risk Score, to quickly indicate the severity of the Risk.



Added color-coding custom chart of Risk aggregation and reassessment

Configuration Required

In version 2.9, we introduced a custom Risk aggregation and reassessment chart. This has now been enhanced with optional color-coding for cells, giving the chart a heatmap-style appearance.



Expanding sub sections upon load of a form

Configuration Required

To improve readability, we use sub-sections to break down form sections with many fields. Previously, sub-section fields were collapsed by default, but we've now added a configurable option to display them expanded, similar to form sections. This provides greater flexibility for users who prefer to see all fields at a glance.

← Update Risk

Risk Information
Risk Assessment
Meta Tags
Actions
Decision Analysis
Associations

Current Assessment

Controls

Product Quality Control
🗑️

[ADD CONTROL](#)

Current Likelihood

1. Very Low 2. Low 3. Moderate 4. High 5. Critical

Current Impact

1. Very Low 2. Low 3. Moderate 4. High 5. Critical

Target Assessment

Target Likelihood

1. Very Low 2. Low 3. Moderate 4. High 5. Critical

Target Impact

1. Very Low 2. Low 3. Moderate 4. High 5. Critical

Target Mitigation Date

08 Jul, 2021

Additional permissions support for Treeviews

Configuration Required

We've enabled more specific permissions for the treeview component. This allows only designated users at the parent level to create child levels. For example, a treeview can now be configured so that everyone can view it, but only an Organization Level 1 Editor can add an associated Organization Level 2. This ensures tighter control over hierarchical structures, helping maintain data accuracy and governance.

Ability to de-select slider fields (blanking them out)

Automatically Added

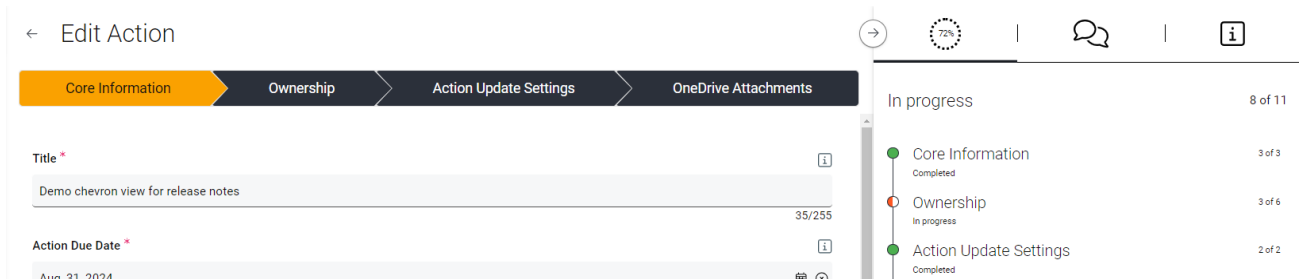
A small update now allows slider fields to be de-selected, enabling them to be left blank if needed. This provides greater flexibility for users when a value is no longer applicable or required.



Extending form chevrons to Bowtie's and Calendar components

Configuration Required

We can now use the chevron form section view in Bowtie and Calendar components.

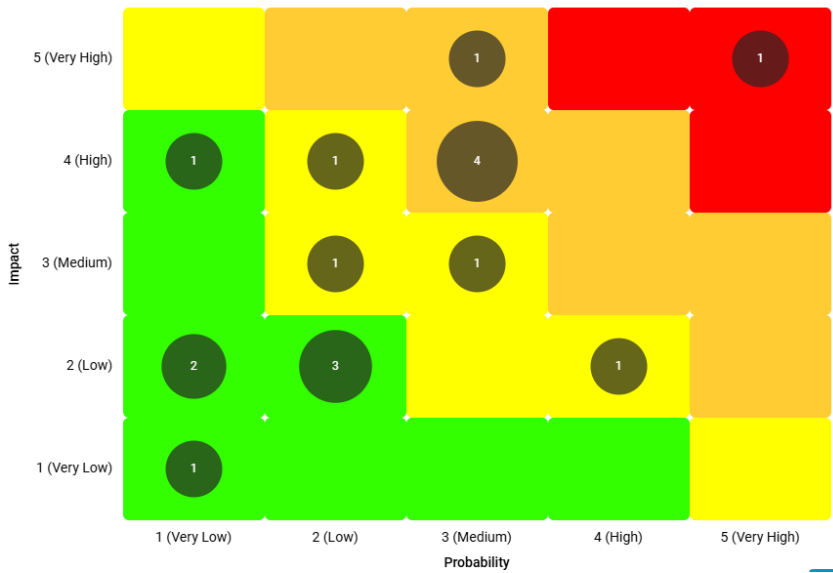


Updated display of Heatmap axis values

Automatically Added

We often use heatmaps to display risks and compare risk scope—impact by likelihood. We typically set options for the impact and likelihood fields as 1-5 but display contextual labels to the user (e.g., Very Low, Very High). Previously, heatmaps labeled the x- and y-axes with 1-5 in such configurations. They will now display the correct labels.

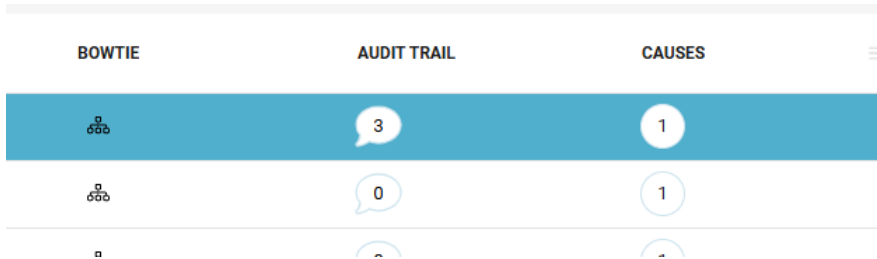
The same has also been applied to pie and bar charts.



Left aligning grid buttons

Automatically Added

For consistency with linked content and comments on grids, we've left-aligned the grid buttons (see bowtie example).



Configuration Improvements

Additional automated fixes have been added to our Configuration Validation tool

Configuration Required

We've added three new automated fixes to the Configuration Validation tool, including exclusions for archived records in all reference data dropdowns across the site, saving potentially hundreds of manual updates. This helps ensure we deliver high quality sites in less time!

Issue Fixing

Support for non-Latin characters in attachments

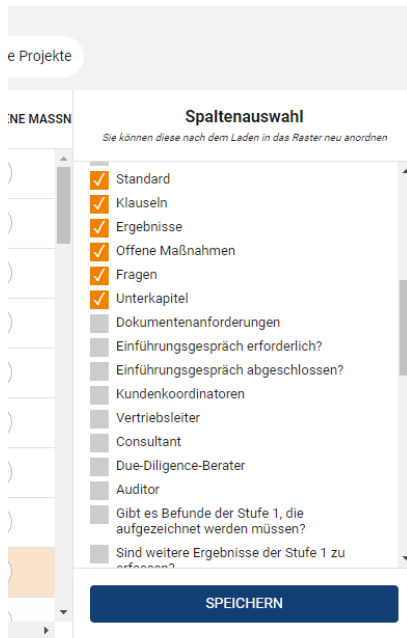
Automatically Added

We have resolved an issue that prevented uploads of attachments with non-Latin characters in their file names.

Small bug fix to column selector

Automatically Added

We identified and fixed a bug in the column selector feature. Previously, if you navigated to a tab with no data, attempted to use the column selector, and then returned to a tab with data, column options would occasionally fail to appear. This issue has now been resolved.



Integrations

Dynamic API dropdown field

Configuration Required

The CoreStream integration capability has been further extended through the addition of a dynamic API dropdown. The initial use case allows clients to select from users in their Active Directory but it can also be used to query other data such as matches for Third Parties in data sources used in our Third Party GRC capability.

For more information please contact:

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