

CORESTREAM

CoreStream Platform v2.2 Release Notes

April, 2023



Document Purpose

This document provides a summary of the highlights of the CoreStream 2.2 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 keep clients and partners informed of the improvements we are delivering.

This document summarises the key user stories and issue fixes (categorised as per the table below) 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 improving our approach to configuration, focused on enhancing 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

2.2 is exciting for a number of reasons. We have made a real step change on our journey to put more choices into the hands of our end users. Once enabled, grid level PDF and Excel exports are now available as personalisation choices for end users. This helps improve flexibility and reduces the time clients need to spend requesting additions to exports and grid column settings. As an added bonus, we've also improved the time taken to generate exports.

Our continued focus on driving useful insight has seen us add the Waterfall/Bridge chart to the suite of chart types available to client admin users. We have also made changes to our world map chart collection so that they can be integrated into the dashboards and sit alongside other chart types.

Internally, we continue to be excited by the development of our 'site builder'. This continues to go from strength to strength and is separating us further from our competitors in terms of the time taken to configure (and ultimately, deliver) new configuration. More on this in 2.3!

As ever, please reach out to your CoreStream Business Owner if you would like to discuss any of the features in this release.

Thanks,
Rich

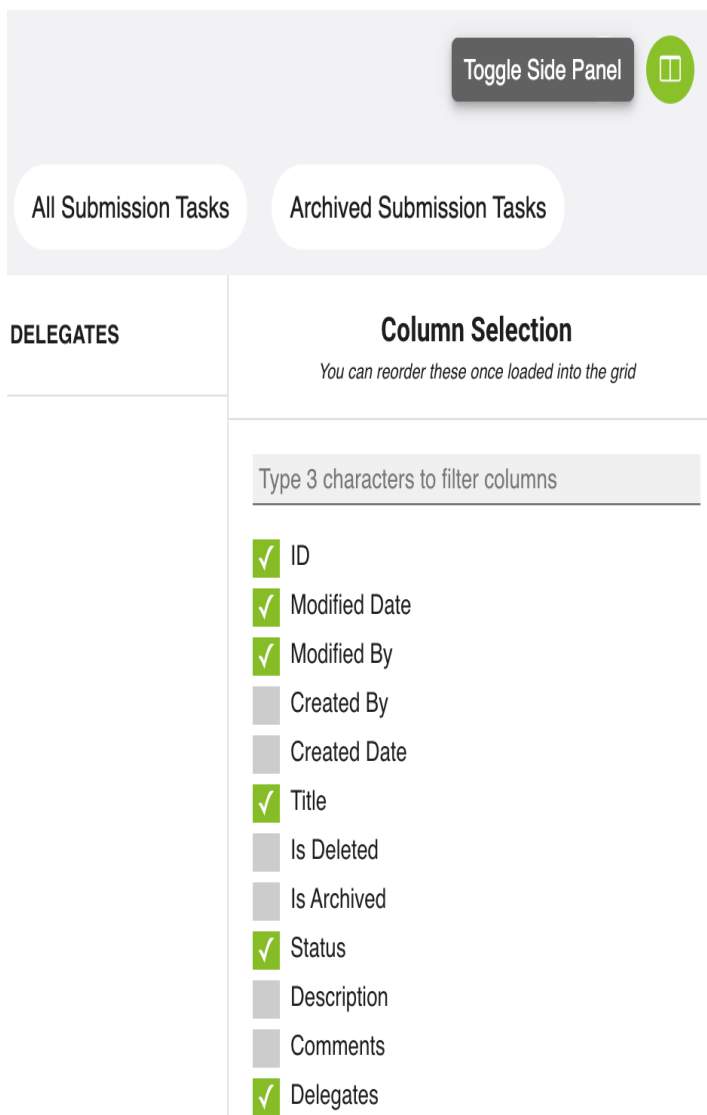
Release Notes

Strategic Features

All columns in a collection available for selection in grids (end user personalisation)

Automatically Added

Any given CoreStream grid can now be configured to enable end users to select from all available columns in a collection without the need for a configuration change. This is an optional feature to ensure that instances of grids that need to show limited columns at all times can still be supported.



End user configurable PDF/Excel exports

Configuration Required

CoreStream has continued the journey to put more configuration choices into the hands of end users. This release includes enabling end users to configure their own grid level PDF and Excel level exports. Broadly, this allows for:

- End users to create their own export templates (for re-use after creation).
- The ability to export columns as per the grid (with or without personalisation).
- The option to export all fields in a given collection.

Export Template Wizard - Pipeline

✕

1 Prepare your export

2 Choose / customise your fields

Choose a field / column to add

Type here to search for item(s)

ADD

Field: Id	Type: Core	Width: 30	
Field: Modified Date	Type: Core	Width: 30	
Field: Modified By	Type: Lookup show subfields	Width: 30	Options: Show as text
Field: Created By	Type: Lookup	Width: 30	Options: Show as text
Field: Created Date	Type: Core	Width: 30	

Core Features

Waterfall/Bridge chart type available in admin user reporting

Configuration Required

The CoreStream Waterfall chart is now available through the admin user reporting wizard. This enables the configuration of a Waterfall chart in a few clicks!



PDF export performance improvements

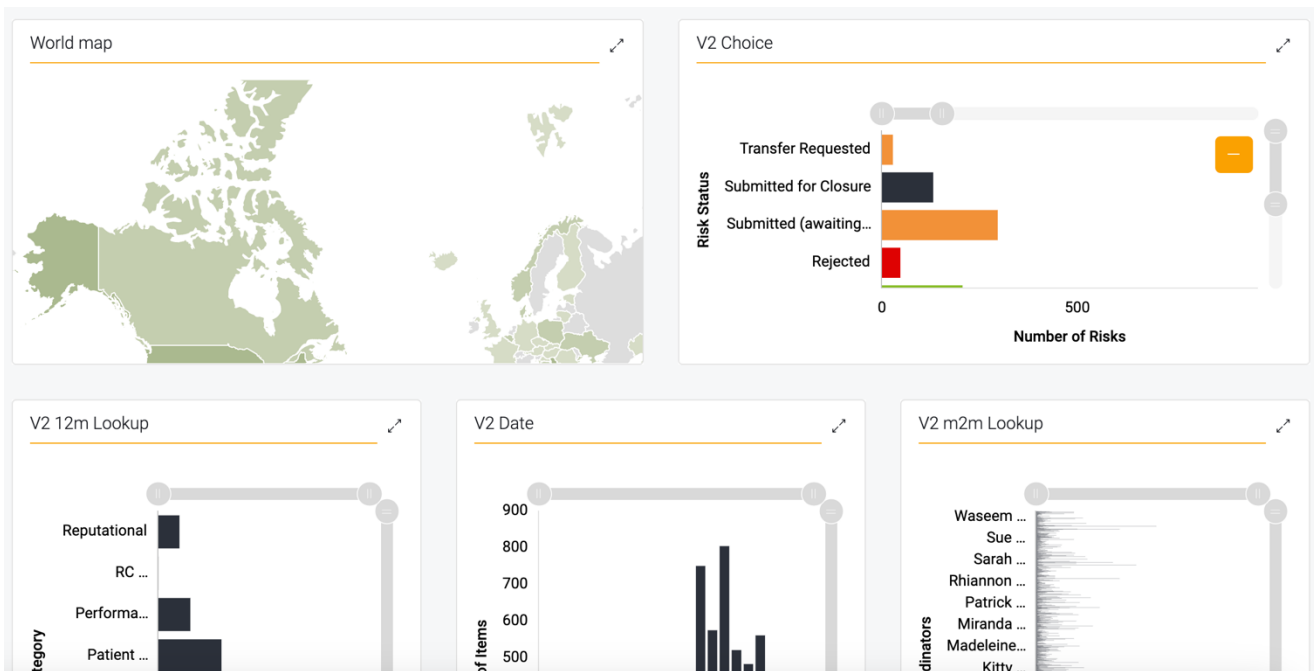
Automatically Added

Grid level PDF exports have been given a turbo boost! This is to ensure that users, whilst being able to continue using the site when waiting for an export to complete, are not waiting an extended period of time for PDF exports to complete.

Ability to have the world map on a dashboard

Configuration Required

The world map charts (pie and pin versions) can now be utilised on dashboards alongside other chart types.

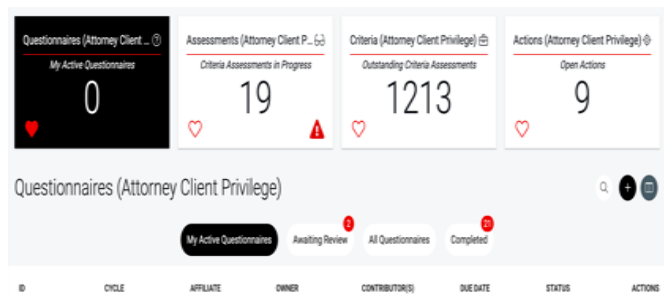


Improve the collapsed view of the "My CoreStream" component

Automatically Added

It was noted that the collapsed / mobile version of the My CoreStream component was losing its impact.

Previously the tiles changed to a standard dropdown, but this has been changed to provide more depth, icons, and colour to the dropdown so that it is clearer to users that it is used to navigate between the different types of CoreStream content.



Configuration Improvements

Ability to download all configuration in one file and re-upload to the target site

Automatically Added

The promotion process between environments (Configuration to UAT to Live) has been updated to consolidate the 6 configuration files into one ZIP file that also contains logos and background images. This ensures a more efficient promotion process.

Ability to have a condition in a child (or parent) collection that evaluates a field in the parent (or child) using the lookup (or virtual) field

Configuration Required

Our configuration now supports the evaluation of a condition based on linked content (child or parent). This results in more efficient configuration as data no longer needs to be replicated in multiple collections to be able to evaluate conditions.

Modifying structure of form configuration to use sub sections

Automatically Added

Sub sections have been introduced in forms configuration. This helps reduce the amount of scrolling required (to navigate the various settings) and provides a more logical structure to find common / related parts of configuration. The aim, once again, is to improve the efficiency and effectiveness of our configuration, and ultimately put this in the hands of (willing) clients!

Site Builder v3/4

Automatically Added

Work has continued on the CoreStream 'Site Builder' to improve the interface and make performance improvements. The Site Builder continues to go from strength to strength and moves us towards even quicker, more standardised configuration!

Move config validator to main platform (out of toolkit) and store results in collection

Automatically Added

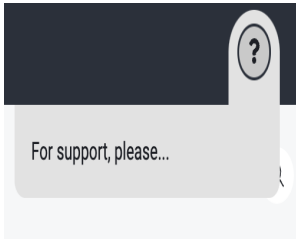
The CoreStream Platform can now effectively test its own configuration! Once a given period of configuration is completed, Configurators can run the configuration validator. This returns results (as it previously would) but now enables them to be marked as 'dealt with' or 'awaiting retest'. This makes the quality assurance process far more effective.

The intention is to continue to build out the rules so there is an even more comprehensive suite of checks. This will help CoreStream ensure the delivery of high-quality configuration.

Issue Fixing

New ? symbol for support information is not resizing

Automatically Added



It was noted that certain blocks of text were causing formatting issues in the new "?" support information feature.

Comments fields in linked content are showing JSON in Excel exports

Automatically Added

A regression issue was noted in the 2.1.5 release that meant comments fields presented in grid level Excel / PDF exports were exporting in their raw JSON format. This has been corrected so they are once again presented as comments.

Excel exports not wrapping text fields in refactored code

Automatically Added

Performance improvements made to the grid level Excel exports resulted in text fields exporting without text wrapping. This has been corrected.

Viewing versions causing an error (related to clock/time changing)

Automatically Added

It was noted that the daylight-saving change caused an issue when attempting to view versions that were created on the date of the change. This has subsequently been resolved.

Technical

Upgrade Platform to .NET 7

Automatically Added

The Platform now operates on .Net 7.

Integrations refactor step 3: Refactor background services in separate assemblies

Automatically Added

As part of our initiative to separate integrations from core platform releases, we have refactored them in separate assemblies. This allows us to be more responsive to new integration requests without impacting the core release.

Pen Test Finding: Low severity - Default IIS Page Accessible

Automatically Added

In one of our regular penetration tests, it was observed that the application discloses default Microsoft IIS server page on accessing via IP address. This has been addressed.

For more information please contact:

RICHARD EDDOLLS

PLATFORM DIRECTOR

RICHARD.EDDOLLS@CORESTREAM.CO.UK

