

CORESTREAM

CoreStream Platform v2.4 Release Notes

01 Sep, 2023



Document Purpose

This document provides a summary of the highlights of the CoreStream 2.4 release. Major Platform releases are finalised every 2 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

CoreStream 2.4 is an exciting release for a number of reasons. It is the first release where we have adopted our new fixed length release process, ensuring we deliver a new Platform release every 2 months. It means being strict with scope, but it helps ensure we can articulate our roadmap with more confidence, and clients have access to new releases more frequently. In addition to this, technical work on integrations has been separated from the release. This means we can work on integrations without impacting the timeframe of our core release.

On the feature front, there are a number of great additions. The calendar view reflects further progress on the Social GRC front and provides an additional interface for clients to view and edit their data in CoreStream. Our next generation Policy Manager now has further styling improvements and integrated attestations with the optional feature to record the amount of time that a user spends reading the given policy, procedure or standard.

On the configuration front, we have continued to make improvements to ensure we can do more with less for our clients. The site builder has been extended to generate tree views and create lookups and we have added the aged chart and heat maps to our admin user configurable dashboards. We are now also able to automatically generate data import templates AND make the data import tool available to clients.

In 2.5 we are looking at further improving our whistleblowing capability with a feature that means those wishing to submit anonymously can do so without authenticating, providing them with a greater level of comfort in doing so.

Please do get in touch with any suggested improvements, or if you wish to discuss any of the features listed in more detail.

Thanks,

Rich

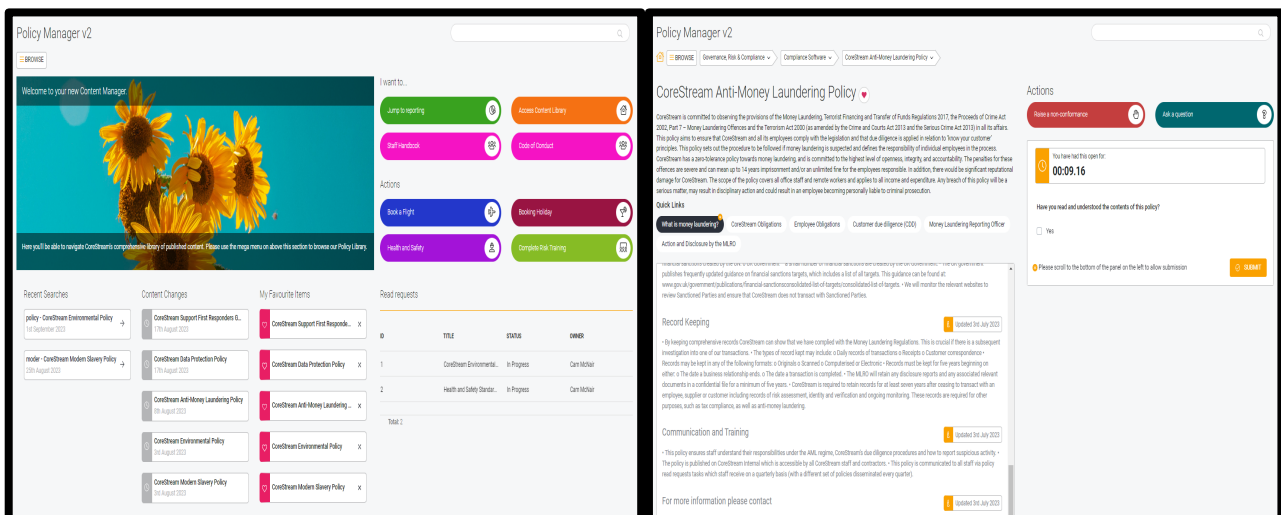
Release Notes

Strategic Features

Attestation/Read Requests functionality added to Policy Manager

Configuration Required

In 2.0, we introduced a new 'website-style' interface for consuming content such as Policies and Standards. In 2.4 we've added integrated attestation/read request functionality. Users can see their outstanding attestations on the home screen and launch them from here. We have added optional functionality to help administrators understand how much time was spent reading each policy, as well as forcing the reader to scroll through the entire document before giving them the option to complete the read request task.



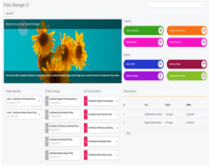
Data Import Tool can now be made available to client admin users

Configuration Required

Our data import tool is something we've used for a long time to bulk upload data for our clients during projects or change packages but we're now opening up access to specific client admin groups. CoreStream can provide the template for clients to then use to update existing or create new data within the platform, in bulk.

Refinement of the UI and review of the underlying logic for the new Policy Manager interface

Automatically Added



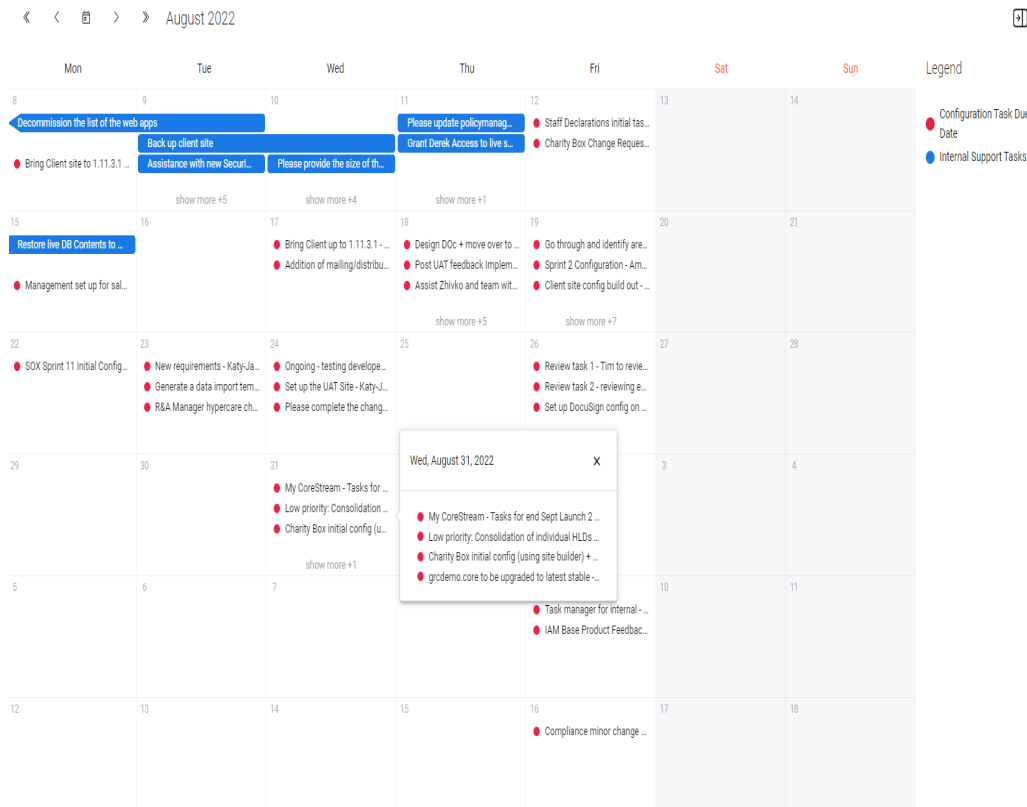
We've refined the look and feel as well re-visited some of the underlying logic behind aspects of Policy Manager such as the permissions and clickable actions within the interface.

A new monthly Calendar display

Configuration Required

A new type of component has been added to CoreStream. This calendar component can show multiple types of records, displayed as either tasks (spanning multiple days) or milestones such as due dates. As with grids, we can configure complex action menus that open the right form at the right stage in the workflow and are only available to those with suitable permissions. Data can be viewed and edited via this interface.

Up next for this feature will be additional views on top of the existing month view - week, work week and day views.



August 2022

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8 Decommission the list of the web apps	9	10	11 Please update policymanag... Grant Derek Access to live s...	12 Staff Declarations initial tas... Charity Box Change Reques...	13	14
Bring Client site to 1.11.3.1 ...	Assistance with new Secur...	Please provide the size of th...				
show more +5	show more +4	show more +1				
15 Restore live DB Contents to ...	16	17 Bring Client up to 1.11.3.1 ... Addition of mailing/distribu...	18 Design Doc + move over to ... Post UAT feedback Implem... Assist Zhivko and team wit...	19 Go through and identify are... Sprint 2 Configuration - Am... Client site config build out - ...	20	21
Management set up for sal...			show more +5	show more +7		
22 SOX Sprint 11 Initial Config...	23 New requirements - Katy-Ja... Generate a data import tem... R&A Manager hypercare ch...	24 Ongoing - testing develop... Set up the UAT Site - Katy-J...	25	26 Review task 1 - Tim to revie... Review task 2 - reviewing e... Set up DocuSign config on ...	27	28
29	30	31 My CoreStream - Tasks for ... Low priority: Consolidation ... Charity Box initial config (u...				
		show more +1				
5	6	7				
				Task manager for internal - ... IAM Base Product Feedbac...		
12	13	14	15	16 Compliance minor change ...	17	18

Legend

- Configuration Task Due Date
- Internal Support Tasks

Wed, August 31, 2022

- My CoreStream - Tasks for end Sept Launch 2 ...
- Low priority: Consolidation of individual HLDs ...
- Charity Box initial config (using site builder) + ...
- grodemo.core to be upgraded to latest stable ...

Core Features

Showing more of the axis labels on the Nested Heatmap chart

Automatically Added

The Nested Heatmap displays a significant amount of data, taking up a large proportion of the screen. Based on feedback, we've adjusted the proportions to make better use of the remaining space and show the full axis labels wherever possible.

Improved column widths for linked content so that we can see more data in the pop-over

Automatically Added

Based on user feedback, we have improved the spacing for linked content popovers.

RELEASE NUM	ID	Title	ReasonForTicket	Include in ...	Status
2.4	19576	New config export/import tool in the UI	Strategic Features	No	E. Pr
2.5 (Next C)	20672	Config Validator	Configuration Improv...	No	E. Pr
1.0 (Integrati	20876	Config Improvements: Bring config validator into the config UI	Configuration Improv...	No	E. Pr
	20877	Config Improvements: Bring config clean-up into the config UI	Configuration Improv...	No	E. Pr
2.4.1 (Next)	21328	We need something to clear SystemLogs and other logging collections (while holding back some data)	Issue Fixing	No	E. Pr
	21996	Move OneDrive logic for create form scenario into a method	Technical	No	E. Pr

The ability to launch any form or process map for an item linked to the one being selected

Configuration Required

It is now possible to launch a form or process map for an associated item of the one being clicked on in a grid. A primary use case is the ability to open up the entire Register for a given Risk. This enables the use of a single form to update all Risks that reside on that Register.

ID	RISK REGISTER	RISK DESCRIPTION	RISK CATEGORY	RISK LEVEL
27	Specialised Commission	Master Edit (Risk Team)	Operational	Level 2
28	London Region	Provide Update	Patient Safety and Quali...	Level 2
46	Personalised Care	Manage Mitigating Actions	Reputational	Level 2
52	Personalised Care	Manage Key Risk Status	Patient Safety and Quali...	Level 2
54	Personalised Care	Request Closure	Operational	Level 2
55	Personalised Care	Create Duplicate Risk	Patient Safety and Quali...	Level 2
427	Public Health Programme	View Version	Operational	Level 2

Configuration Improvements

Automated configuration validation to identify leading or trailing spaces in choice field values

Automatically Added

When copying and pasting choice field (e.g. Status) values from a design or requirements document, it is possible to miss a leading or trailing space. Once introduced into the configuration, it is then introduced into the data where records are associated with the given value. This small error is now automatically identified and flagged during configuration.

Automating the build of Excel templates that are compatible with our Data Import Tool

Automatically Added

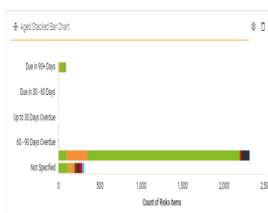
CoreStream admins now have the ability to auto-generate a data import template that's ready to be populated and uploaded into the platform.

Aged Bar and Aged Stacked Bar charts can now be configured by client admin users

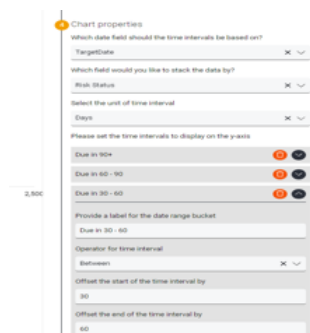
Automatically Added

Two complex chart types, that previously required the CoreStream team to build, are now available in the Admin User Configurable Reporting wizard. Aged Bar and Aged Stacked Bar charts can all now be configured by any admin user in just a few clicks.

The time intervals on the Aged charts can be fully customised and these charts made visible to all with access to a given dashboard.



If you already have Admin User Configurable reporting, these will be automatically added to your suite of available chart types with no additional configuration required.



A new type of event that allows us to aggregate (sum, multiply, max, min, average, and more) two or more fields

Automatically Added

Previously having to be written in SQL, we're now able to configure calculations in a similar format to that of Excel. This lowers the complexity and increases the speed of configuring complex calculations for our clients.

In the next iteration we hope to bring the calculations into the form, showing you the results in real-time as you select the relevant input fields.

Automated configuration validation to identify incorrectly configured condition combinations

Automatically Added

If two 'does not equal' conditions (e.g. 'Risk Status does not equal Archived' and 'Risk Status does not equal Closed') are combined by an 'Or' operator (rather than an 'And') then they will always pass. A small detail such as this an 'And' or a 'Or' is an error that's easily missed so automated config validation highlights this potential issue.

Automatic identification of fields that are editable in a form but also overwritten by the hierarchy synchronisation tool

Automatically Added

There are some instances of fields that are both editable in a form but also automatically updated by the hierarchy synchronisation tool overnight - most often when the synchronisation logic is large and/or complex.

There is now an automated configuration check for fields included in the synchronisation rules, that it's also possible to edit by another means, to avoid this confusion.

Automated configuration check for sub forms that do not have a unique ID

Automatically Added

Though an uncommon issue we've added automated validation of sub form configuration that might otherwise cause unexpected behaviour in forms containing multiple types of sub forms.

Site Builder can now create Organisation Hierarchy Treeviews

Automatically Added

The latest iteration of the wizard-based CoreStream site builder sees support for hierarchy tree views to the interface. This includes being able to build the relationships between objects such as an Organisation Level 2 to an Organisation Level 1, or a Mitigating Action to a Risk. The site builder continues to improve the speed and accuracy of platform configuration.

Database validator that checks junction tables have primary keys and clustered indexes

Automatically Added

This new feature allows the CoreStream team to check the level of performance optimisation for the underlying database structure without requiring direct database access or specialist SQL server skills. This means associated issues can be resolved more quickly, without needing to escalate to the technical team.

Heatmap charts can now be configured by client admin users

Automatically Added

Heatmap charts have been added to the suite of chart types available to admin users. We most often see these charts in the 5x5 format but they will adapt to the number of values in the fields selected for each axis.



The colours of the segments can be customised via the Client Config UI or by the CoreStream team. In the next iteration we'd like to add a simple UI to the wizard for customisation of colours.

Issue Fixing

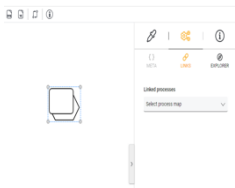
Resolved issue where hiding specific columns from your view also hid any colouring of other columns that depended on it

Automatically Added

We've fixed a small bug where, if you use the Column Selector feature (added in 2.3) and you have colours configured based on a field that is not in your view, the colour wouldn't show. Now if for example you your Risk Score field is coloured based on Impact and Likelihood values, you do not need to include Impact and Likelihood in view to see the RAG colouring.

Ability to restrict the linked processes dropdown selections within Process Mapping

Configuration Required



When adding a linked Process to your Process Maps previously, you'd see every Process in the list regardless of their status or whether they were archived. We can now filter this dropdown based on specific requirements so that it only shows the specific Processes that it should.

Technical

Moving CoreStream's front end framework over from Vue 2 to Vue 3

Automatically Added

Vue 3 is the latest major version of Vue.js - the framework we use at CoreStream to build our intuitive user interface. The migration from Vue 2 to Vue 3 was a major undertaking but one that future proofs and provides improved performance.

For more information please contact:

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