

**CORESTREAM**

# CoreStream Platform 2.6 Release Notes

01 Mar, 2024



## Document Purpose

This document provides a summary of the highlights of the CoreStream 2.6 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.

<b>Strategic Features</b>	The introduction of new Platform features considered to be of strategic importance.
<b>Core Features</b>	Improvements to existing features or new functionality that is more limited in scope than the strategic features.
<b>Configuration Improvements</b>	Changes relating to improvements to our approach to configuration, focused on improving the efficiency, accuracy and consistency of Platform configuration.
<b>Issue Fixing</b>	The resolution of Platform issues.
<b>Integrations</b>	External applications or systems that CoreStream has integrated with.
<b>Technical</b>	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

Given it is such a hot topic at the moment, it is only right to start by highlighting our Artificial Intelligence (AI Co-pilot). We have utilised AI in CoreStream for some time now (providing an automated assessment of how well controls are defined). The AI Co-pilot takes our AI capability to the next level.

Our initial version is integrated with ChatGPT but is built in a way that allows us to substitute this functionality for other third-party offerings or even client models. The latter can help with the data privacy concerns that many uses of AI lead to.

In addition to the flexibility of the technology element, we have also implemented this in the true CoreStream way, meaning that we can configure it in any form, module or context it is required in. A popular application is the suggestion of causes, consequences or controls given a specific risk description. Others include the suggestion of corrective actions based on a finding or incident, or suggesting risks based on a description of the register.

It is often the case that my preferred features in a given release are not always the flagship ones, and 2.6 is no exception. I am a huge fan of our “save and continue” feature because it will make a big difference to a number of existing client use cases we already support. Being able to trigger complex calculations and workflows (including integrations with external systems) and be instantly presented with the results, makes the CoreStream workflow engine even more powerful. A simple example of this is functionality which allows us to check if a given third party is sanctioned. The user can trigger the request and receive the result instantly, without exiting the form.

Collaborative editing is also a highlight and enhances our policy management offering further. We have big plans for this in the future!

As ever, if you would like a demonstration of any of the features listed or would like to make roadmap suggestions, please do get in touch. Our roadmap continues to be driven by our clients and partners, with a dose of our own strategic vision!

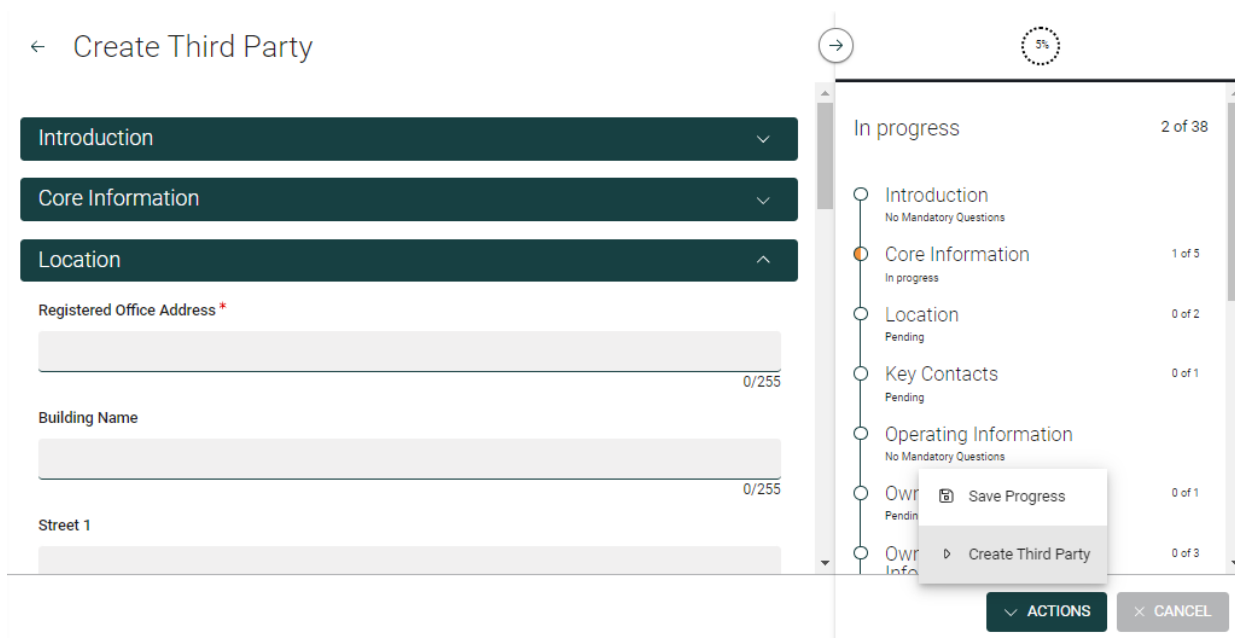
# Release Notes

## Strategic Features

### Save and continue

*Configuration Required*

Previously, saving a form in CoreStream could only be done via a 'save and exit' button. We've introduced a 'save and continue' option in 2.6 which has the capability to execute any logic within the clicked button, and instantly reload a form – either the same form or a different one with different/additional fields that may have been populated by the save action.

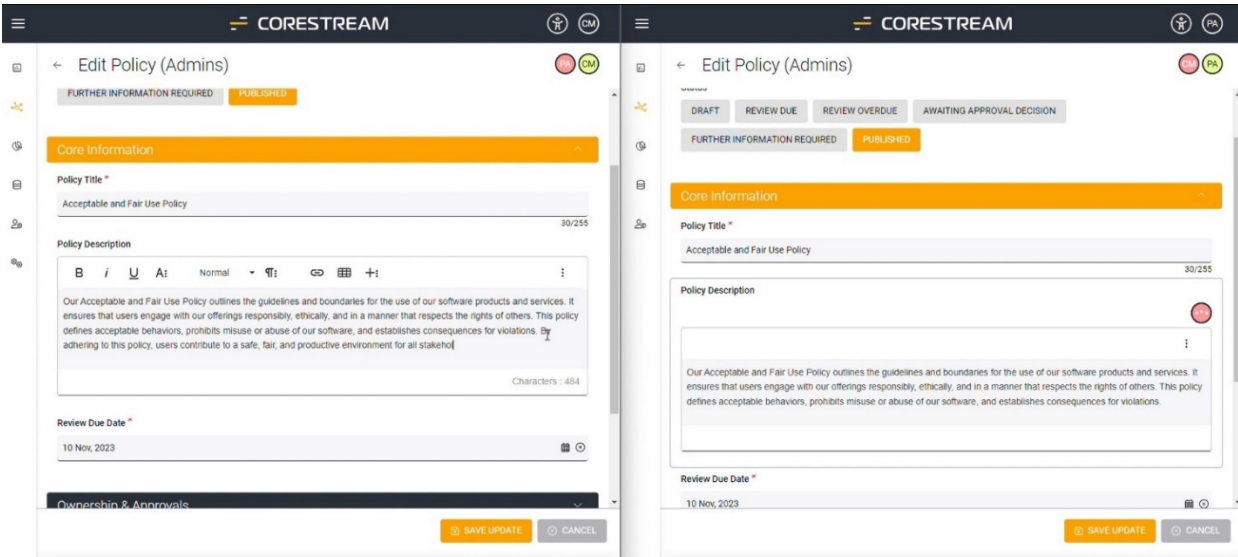


### Collaborative editing within forms

*Configuration Required*

Collaborative editing in CoreStream enables multiple users to edit the same record simultaneously, with real-time updates. When one user is editing a specific field, others are restricted until the user finishes their updates. Their updates reflect in the form of all other users.

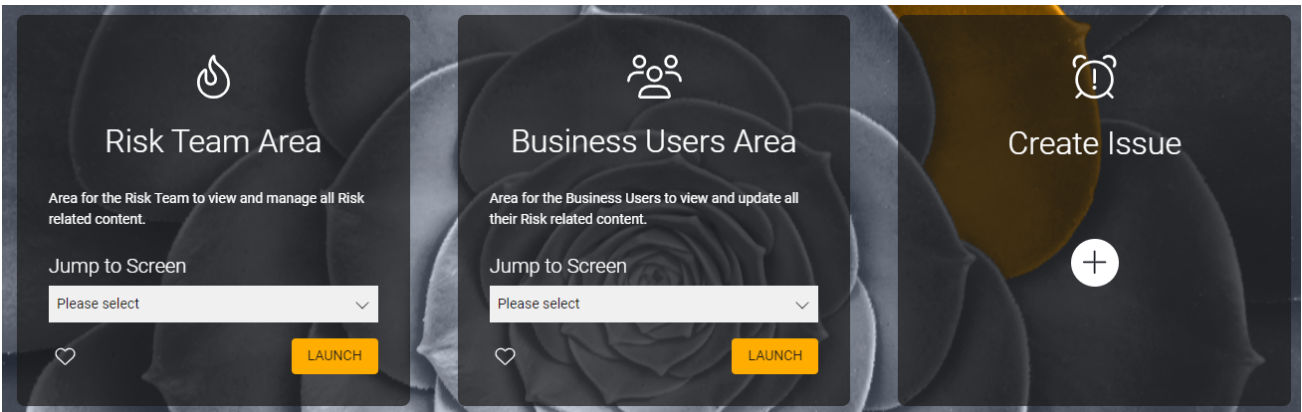
Future plans include enhancing collaborative text editing to enable multiple users to edit the same rich field concurrently, with integrated tracking of changes.



## Creating data from the Home screen

*Configuration Required*

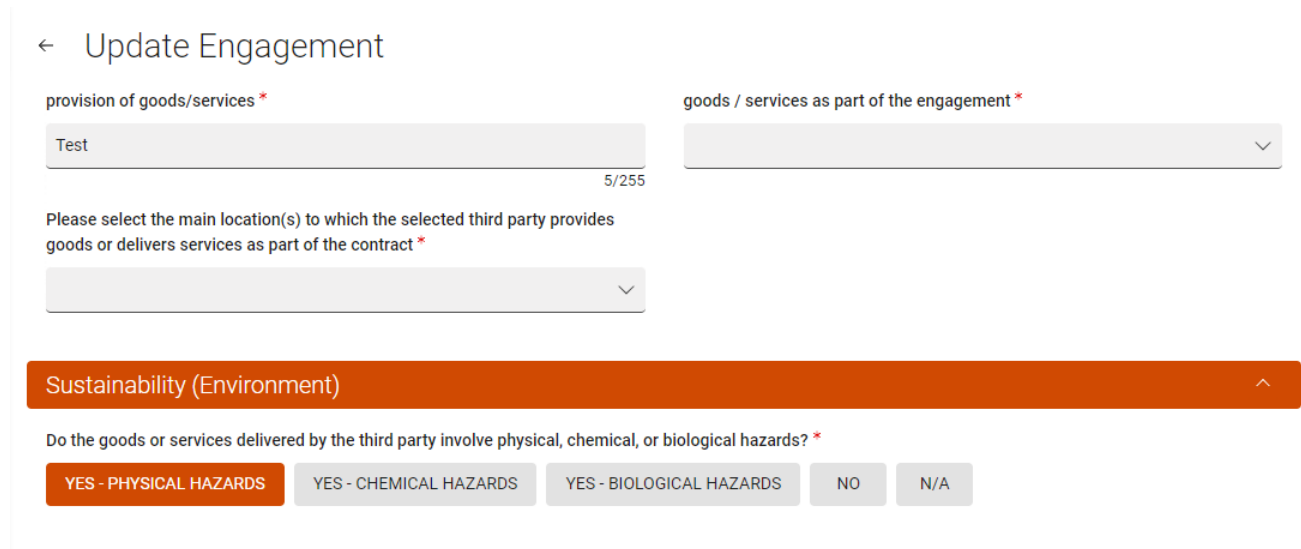
Whilst a number of CoreStream clients use the platform on a daily basis, our aim is also to support the infrequent user, enabling them to complete common tasks with minimal clicks and distractions. With this in mind, we've added the option to launch create forms directly from the Home screen. Each form can be represented by a dedicated tile, or multiple forms can be listed within a single tile.



## Showing only select form sections in two-column mode

*Configuration Required*

For a long time, we've offered the option to showcase forms in a two-column layout. However, certain field types, such as sliders, have been less effective in this format due to reduced width. Now, we've made improvements to enable not only form-level but also section-level activation of the two-column mode, providing greater flexibility in presentation.



← Update Engagement

provision of goods/services \* goods / services as part of the engagement \*

Test 5/255

Please select the main location(s) to which the selected third party provides goods or delivers services as part of the contract \*

**Sustainability (Environment)**

Do the goods or services delivered by the third party involve physical, chemical, or biological hazards? \*

YES - PHYSICAL HAZARDS
  YES - CHEMICAL HAZARDS
  YES - BIOLOGICAL HAZARDS
  NO
  N/A

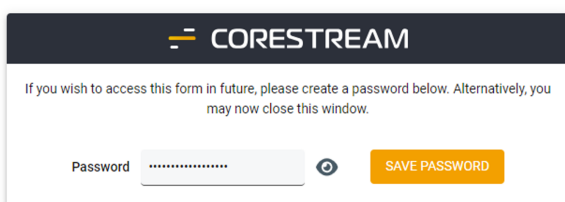
## Anonymous forms – ability to track an anonymous submission as it progresses


*Configuration Required*

In version 2.5, we implemented the feature to anonymously (or without authenticating but providing contact details) submit content to CoreStream, serving two main purposes:

1. Facilitating anonymous content submissions, such as incident, whistleblowing and speak up reports, without attribution.
2. Allowing individuals without platform access to submit content. This extends to members of the public or those from partner organisations who clients may prefer not to issue accounts to.

In 2.6, creators of submissions can track and review their entries using a unique password and URL, retaining their anonymity but allowing continued progress tracking.



 CORESTREAM

If you wish to access this form in future, please create a password below. Alternatively, you may now close this window.

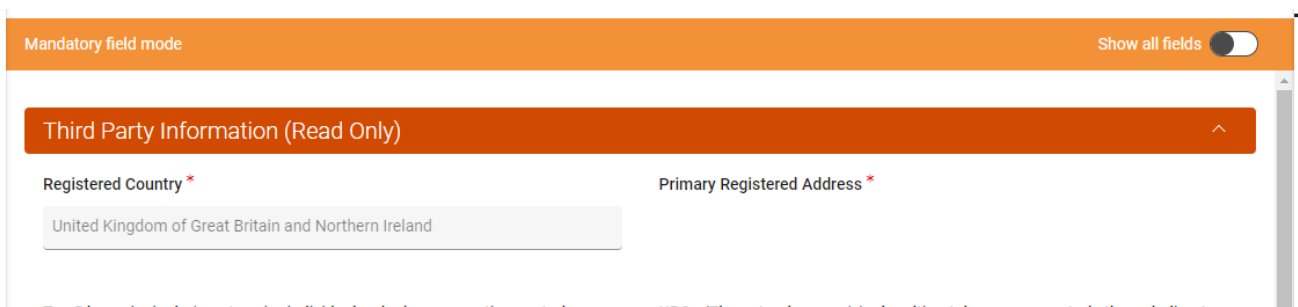
Password

## Showing only incomplete mandatory fields upon loading a form (with ability to toggle on/off)

*Configuration Required*

In 2.5, we developed the ability to reduce the size of an existing form to show you only the incomplete mandatory fields. This is to assist when you've attempted to save but have a few incomplete mandatory fields somewhere within a large form.

We've developed on this further in 2.6 and added an option to have a reduced form load this way by default, with the option to switch to displaying all fields.



## CoreStream Artificial Intelligence Co-pilot - powered by ChatGPT

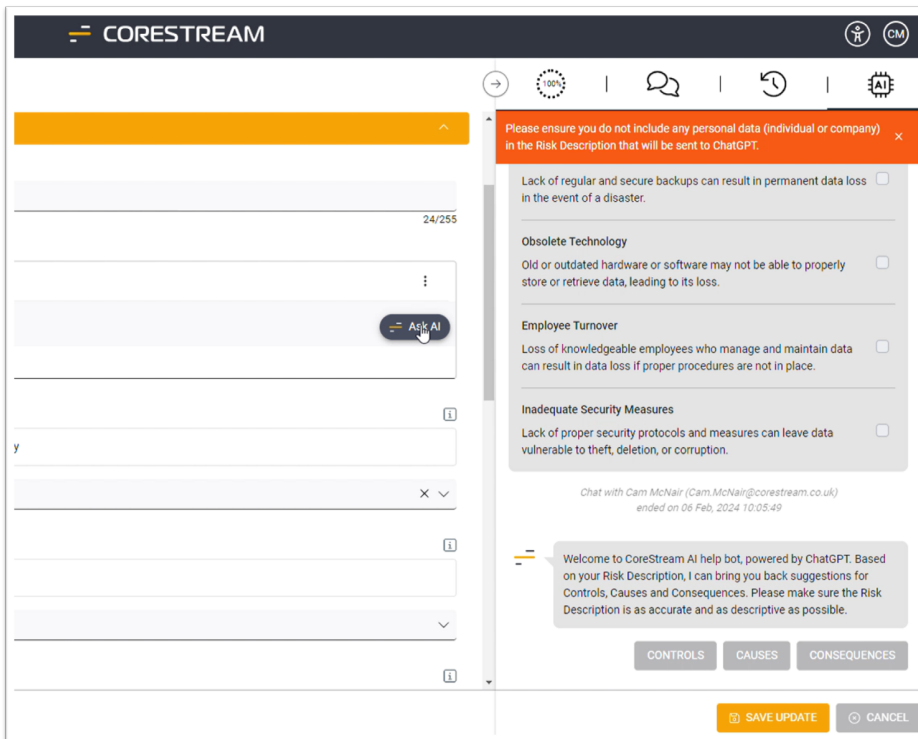
*Configuration Required*

We're thrilled to announce the integration of ChatGPT into our forms, combining the versatility of such a powerful feature with the flexibility and intuitiveness of the CoreStream Platform. In the true CoreStream way, we have developed this as a generic feature, enabling us to utilise it across all modules and use cases and to substitute the AI engine. This means that we can use specific third party models our clients prefer, and even utilise internal client generated models.

An example of a client use case is the suggestion of causes, consequences, actions and/or controls based on a risk description. The user is provided with a list of suggestions which they can then select (or not) to automatically populate their risk form.

It is still our view that Artificial Intelligence is there to support users. It helps makes us more efficient and effective, suggesting things we may not have considered. We need to be

cautious of automation in this space, bypassing human review. This is why we are using the term “Co-pilot”!



## Core Features

### Emailing a specified email address

*Configuration Required*

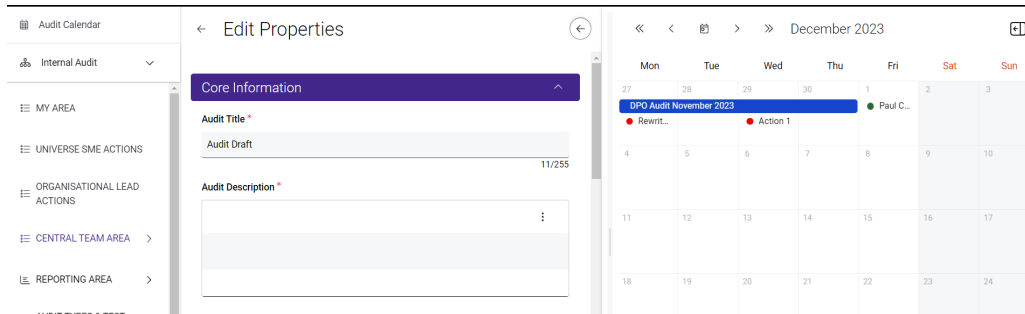
Instant email notifications can now be sent to any email address specified in a text field, regardless of whether the recipient is a platform user. Previously, notifications were limited to users with accounts within CoreStream. This enhancement enables external individuals to stay informed about platform content without needing access to CoreStream.

### Displaying a calendar view whilst working within a form

*Configuration Required*



Sometimes it's useful to be able to have a view of where a task you're raising/editing might fit within the schedule. We have therefore added the ability to display the CoreStream Calendar component alongside your form. This will be a welcome addition to our audit module, where auditors are being assigned.



## Upgrade of Font Awesome to latest version

*Automatically Added*

The upgrade of Font Awesome (our icon library) to version 6 brings with it slight redesigns of existing icons and new available icons.


















## Issue Fixing

### Small bug fix associated with cloning sub form/repeater items and immediately re-ordering

*Automatically Added*

In some specific scenarios, when a repeater within a form was cloned and re-ordered, it's positioning would not behave as expected. We've resolved this and now your repeaters will remain exactly where you left them.

#### Consequences

- ↑↓ > Product which does not meet specification/not-fit-for-purpose
 



- ↑↓ > Product which can potentially cause harm to end user
 



- ↑↓ > Potential environmental impact
 



- ↑↓ > Enforcement/Field/Recall actions from regulatory agencies/customers
 



- ↑↓ > Loss of Licence to Operate or of third party operating certifications
 




## Compliance with WCAG 2.1/2.2 accessibility (continued)

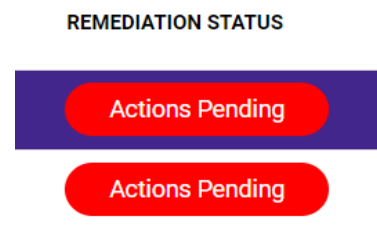
*Automatically Added*

To ensure we further align with WCAG 2.1 accessibility guidelines we've made more updates in 2.6. We'll continue in 2.7 to bring the platform into full alignment with the WCAG 2.1 and begin work to align with WCAG 2.2 guidelines. We have an external audit process in progress, providing feedback on our Platform against the 2.2 guidelines.

## Colour coding when using the Column Selector

*Automatically Added*

In version 2.3, we introduced the capability to add custom columns to a grid, irrespective of whether they had been pre-configured by our team. However, a limitation of this feature was that columns couldn't retain their colour coding unless specified in configuration. Now, any selected column will display its colour coding without the need for additional configuration.



## Switching grid column filters from checkboxes to text search when limit is exceeded

*Automatically Added*

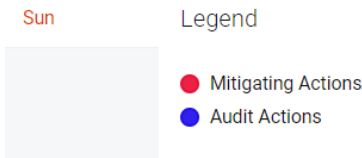
When the number of distinct options in a grid column filter surpasses 1000, viewing the full list becomes impractical, and using a text filter for searching becomes preferable. Hence, grid column dropdowns will dynamically adjust when this limit is exceeded, aiming to facilitate faster and more convenient searches.

## Small bug fixes with the Calendar component

*Automatically Added*

In version 2.4, we introduced a Calendar component allowing users to view various content types in a monthly calendar format. We've addressed a minor bug, now enabling the

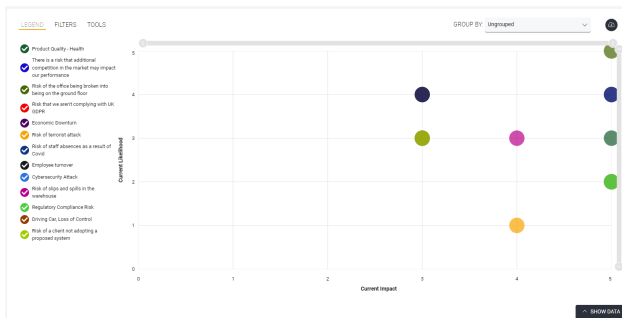
segregation of a single content type (e.g. Actions) to be displayed separately in the legend. For example, we may show actions of different types as separate legend items.



### Resolved loading issue when attempting to view all risks 'ungrouped' on a risk visualisation chart

*Automatically Added*

Once again, your risk visualisation chart will be able to show the 'ungrouped' risk profile - i.e. all risks as individual bubbles.



### Improved load times for forms containing lots of linked content

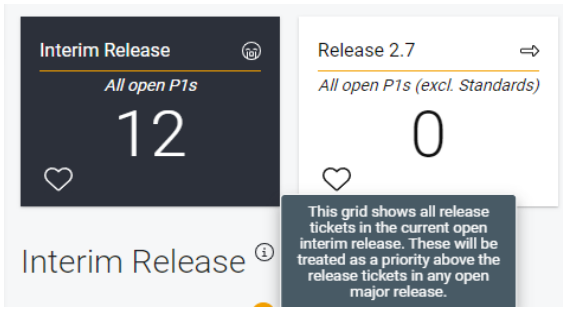
*Automatically Added*

We observed a slowdown in the loading times of large forms containing numerous linked content/repeaters, in part due to our transition to Vue 3. Consequently, we've revamped our code to address this issue, ensuring even faster performance than what was experienced with our Vue 2 version.

### Bug fix allowing us to add tooltips to grids within dashboard components

*Automatically Added*

We've always been able to show tooltips on grids that are standalone within the navigation and we can now also show similar tooltips on grids within a dashboard navigation.

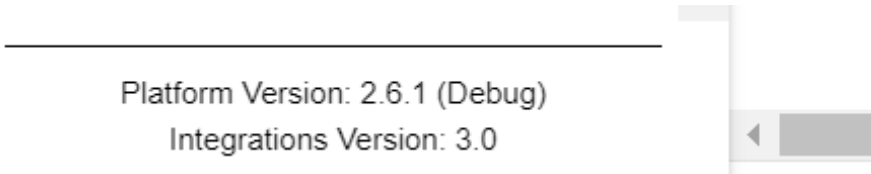


## Technical

### Additional platform versioning information

*Automatically Added*

As well as showing the current platform version at the bottom of the left-hand navigation, it's now possible to see the 'integration' version (where applicable) and information on whether the site is deployed in 'debug' mode or not. Debug mode is a setting we use on most UAT sites which prevents the platform sending emails to users.



For more information please contact:

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