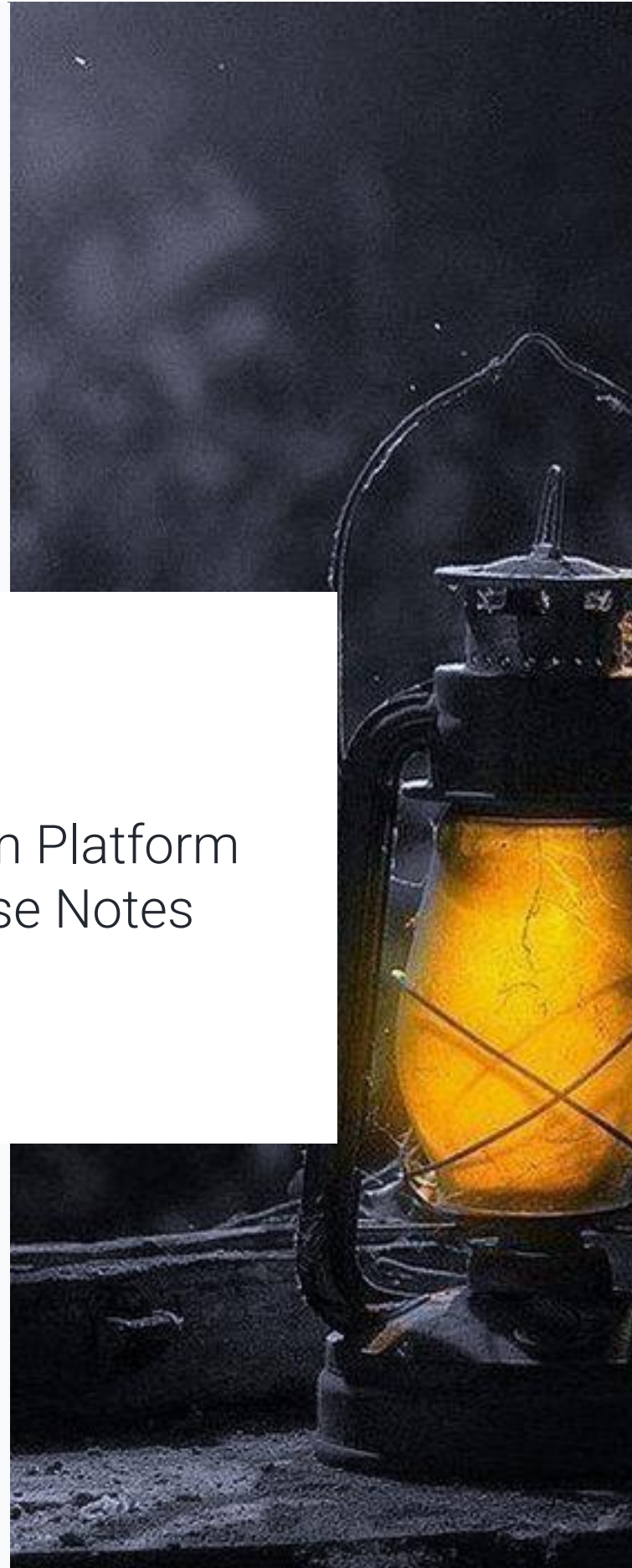


CORESTREAM

# CoreStream Platform 2.11 Release Notes

1 Feb, 2025



## Document Purpose

This document provides a summary of the highlights of the CoreStream 2.11 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.

<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

Version 2.11 brings a series of strategic improvements aimed at enhancing usability, streamlining workflows, and strengthening the platform's performance. With this release, we've focused on making the user experience more intuitive and efficient while ensuring the system remains robust and scalable for future needs.

A strategic enhancement is the ability to configure the Forms Co-Pilot feature to use your own Azure OpenAI instance. This gives organizations greater control and customization of the AI's responses, and, most importantly, full control over where data is processed and stored. This is a significant consideration for all of our clients using AI.

We have also made a number of improvements to our forms, including the ability to prevent end dates from being set before start dates in forms. This feature addresses a common challenge, ensuring greater data consistency and reducing the risk of errors in project planning. We've also made significant improvements to the translation functionality, ensuring that email notifications and summary reports are displayed in the recipient's preferred language, offering a more personalized experience.

On the technical side, the upgrade to .NET 8 enhances platform performance and security, while caching OAuth access tokens streamlines integration calls, making the system faster and more efficient. These updates lay the foundation for a more responsive and scalable platform.

We're excited about these enhancements and look forward to seeing how they improve your experience. As always, we appreciate your feedback and remain committed to continuously evolving the platform to meet your needs.

Rich

# Release Notes

## Strategic Features

### **Preventing End Dates from Preceding Start Dates in Forms**

*Configuration Required*

We support a wide range of fields in our forms and recognize that date fields are often interrelated. For instance, in a project you might track the Start Date, Next Major Milestone, and Completion Date. It makes little sense for a Completion Date to precede a Start Date or for a Next Milestone Date to fall after the Completion Date. We've now introduced a feature that links date fields, ensuring each subsequent date is the same or later than the previous one. This improvement enhances data consistency, reduces errors, and streamlines project planning.

**Feedback Due Date \***

This is the date all feedback tasks should be raised by.

06 Mar, 2025

**Due Date \***

This is the date all feedback tasks and config changes should be completed by.

No dates have been selected yet

< March 2025 >

Mon	Tue	Wed	Thu	Fri	Sat	Sun
24	25	26	27	28	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

## Risk Visual Chart Exports with Integrated Legend

*Automatically Added*

We've updated the export functionality so that the legend is now embedded in the exported image. This ensures the image includes all necessary context - such as legend colors and icons - making it easier to interpret without referring to external documentation.

ACCEPTABILITY	CHANGE LEVEL	TREND in Control & Risk Environment
<span style="color: green;">●</span> Risk Level Acceptable	<span style="color: blue;">■</span> Shows Change	<span style="color: green;">↑</span> Improving
<span style="color: yellow;">●</span> Mgmt of Risk Needs Improvement	<span style="color: red;">■</span> New	<span style="color: black;">●</span> Stable
<span style="color: orange;">●</span> Mgmt of Risk Needs Major Improvement	<span style="color: grey;">■</span> No Change	<span style="color: black;">↓</span> Declining
<span style="color: lightblue;">●</span> Risks & Actions Under Review	<span style="color: grey;">■</span> Removed / Delegated	<span style="color: black;">X</span> Removed / Delegated
<span style="color: grey;">●</span> Removed / Delegated		

## Improved Text Box Sizing in Risk Bowtie Diagram

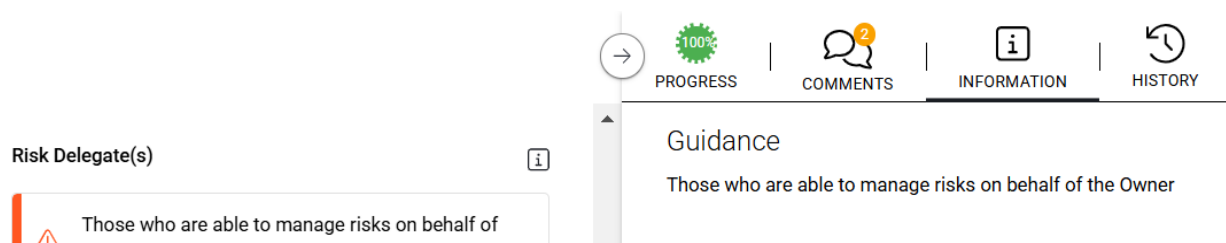
*Automatically Added*

We've enhanced the resizing logic in the Risk Bowtie diagram to accommodate longer Cause/Consequence and Action/Control titles. This improvement ensures that even with extended text, labels are displayed clearly and the diagram maintains a clean, organized appearance. The updated sizing provides better readability while preserving the overall structure and visual balance of the bowtie.

## Auto-Activate Side Panel Guidance in Forms

*Configuration Required*

Based on valuable client feedback, we've made in-form guidance even more intuitive. Now, when users click into a field with configured side panel guidance, the guidance will automatically appear - no need to click the "i" icon. This improvement streamlines data entry, ensures important information is always visible, and enhances the overall user experience.



## Expanded Translation Support

*Configuration Required*

In version 2.10, we completed a full refactor of our Translation capability to address the evolving needs of our platform. The initial design, while effective at the time, needed to be rethought to ensure scalability and flexibility as feature use expanded. With the new design in place, we've successfully implemented full translation support for Summary Emails and Email Notifications in version 2.11, ensuring they render in the recipient's chosen language. Additionally, we've added translation support for a previously unsupported field. These improvements were significantly easier to implement thanks to the refactor, allowing us to deliver a more efficient and scalable translation system.

## Enhanced Support for Chevron Form Sections

### *Configuration Required*

We have extended support for our alternative form section style featuring chevrons. In version 2.11, these sections can now be configured in forms opened directly from the Home screen.

← Edit Action

Core Information Ownership Action Update Settings OneDrive Attachments

**Title \*** 35/255

Demo chevron view for release notes

**Action Due Date \*** Aug, 31, 2024

**Progress:** 72%

- Core Information: Completed (3 of 3)
- Ownership: In progress (3 of 6)
- Action Update Settings: Completed (2 of 2)
- OneDrive Attachments: No Mandatory Questions

## Core Features

## Clickable URL Fields in Forms

*Automatically Added*

We've extended our URL-type field to forms and made it automatically clickable in view mode. Just like in grids, clicking a URL field in a form now immediately navigates to the destination.

URL

<https://www.corestream.co.uk/2-11-release-notes/>

0

## Markup for Field Version History

*Configuration Required*

We've enabled the ability to view text markup within our field-level version history feature. You can now see not only the various versions of a field and the dates they were changed, but also any text that has been removed, added, or reformatted. This enhancement offers greater transparency, making it easier to track and manage changes.

← Edit Risk Properties

**Risk Title \***

There is a risk that additional competition in the market may impact our performance 84/255

Display field history ☐

**Risk Description**

Additional competition in the market may adversely impact our performance. This risk stems from the possibility of new entrants or more aggressive strategies from existing competitors, which could erode our market share and place downward pressure on our pricing and profit margins. In response, we may need to invest further in innovation, marketing, and customer engagement to maintain our competitive edge. If not managed effectively, these adjustments could increase our operational costs and ultimately affect our overall profitability.

Ask AI

Display field history ☐

PROGRESS | COMMENTS | HISTORY

Enable field-level version history ☒

Risk Description

There is a risk that additional competition in the market may adversely impact our performance. This risk stems from the possibility of new entrants or more aggressive strategies from existing competitors, which could erode our market share and place downward pressure on our pricing and profit margins. In response, we may need to invest further in innovation, marketing, and customer engagement to maintain our competitive edge. If not managed effectively, these adjustments could increase our operational costs and ultimately affect our overall profitability.

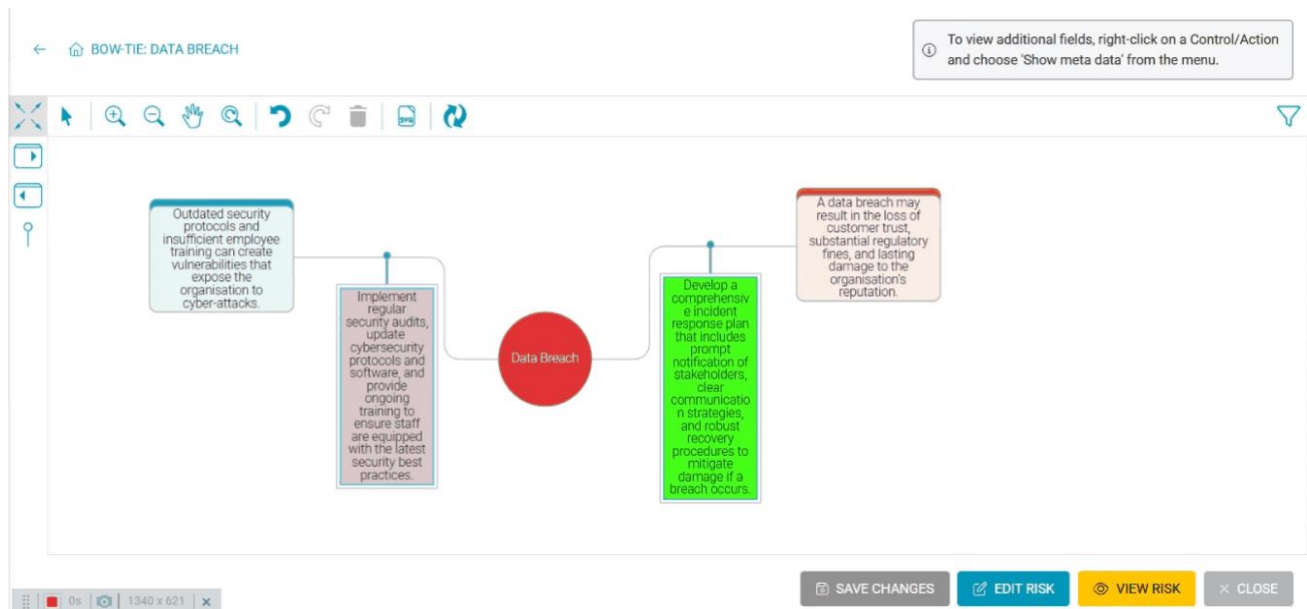
Cam Mcnair 28 Feb, 2025 11:29:10

## Filtering of Actions/Controls on Bowtie Diagrams



### Configuration Required

We've enhanced our risk bowtie diagram with the ability to filter Actions/Controls linked to Causes or Consequences. This feature enables you to focus on the most relevant elements, streamlining your analysis and supporting more effective decision-making.



### Custom File Names for Word and PDF Exports

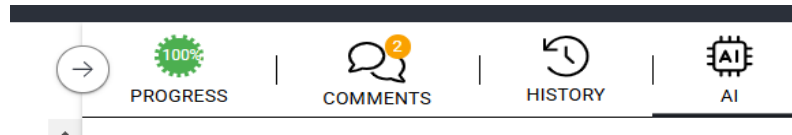
#### Configuration Required

We heard feedback from our clients that using generic names for Word and PDF exports wasn't ideal. Now, exports can be named after the title of the item or record, making it easier to identify and organize files quickly. This enhancement streamlines document management and reduces the need for manual renaming.

### Improved Styling for Side Panel in Forms

### Automatically Added

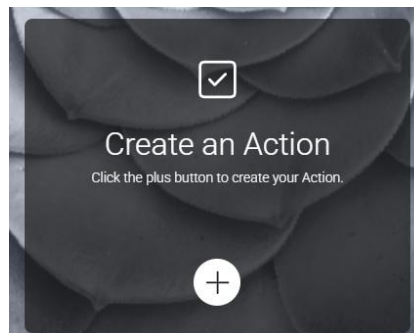
We've made subtle styling enhancements to the side panel in forms, including clearer icons and more distinct headings. These updates improve readability and provide a more polished, user-friendly experience as the side panel is used more frequently.



## Enhanced Create Form Tiles on Home Screens

*Configuration Required*

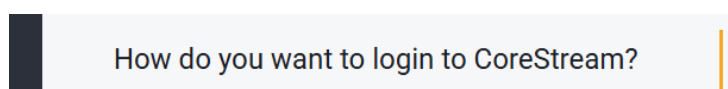
Create forms launched from a tile on the Home screen previously inherited their title from the tile itself. Now, this form title can be overridden when needed, offering greater flexibility to customize form names and better align with specific use cases.



## Configurable Log In Wording

*Configuration Required*

While many clients refer to their platform instance as "CoreStream," others prefer to customize it to align with their branding and tool suite. To support this, we've made the log-in screen wording configurable, allowing clients to refer to the platform in a way that best fits their organization's identity. This small enhancement provides greater flexibility and a more cohesive user experience.



## Configuration Improvements

### Additional automated fixes have been added to our Configuration Validation tool

*Configuration Required*

We've added two new automated fixes to the Configuration Validation tool, including addition of default alphabetical sorting on the title field for all appropriate lookups. This helps ensure we deliver high quality sites in less time!

## Issue Fixing

### Section-Level Alerts Now Supported in Sub-Forms

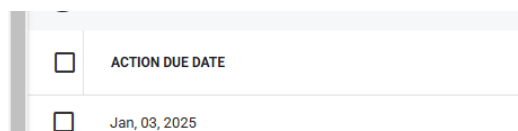
*Automatically Added*

We've fixed an issue that prevented section-level alert messages from displaying in sub-forms. This ensures that important guidance and notifications now appear correctly, improving clarity and user experience.

### Bulk Update Checkboxes and Column Reordering Issue Resolved

*Automatically Added*

We've fixed an issue with the bulk updater when a user's personalized grid columns are reordered. The bulk update checkbox now consistently appears on the left, eliminating confusion.



### Added Compatibility Between Chevron Sections and Expandable Sub-Form Features

### Automatically Added

Two previously incompatible features can now be used together seamlessly. Chevron-style sections can now include expandable sub-forms, and when expanded, the sub-form will open within the same section styling. This enhancement improves the user experience by maintaining consistent design and functionality across sections.

← Update Risk Scenario

Core Information Risk Classification Ownership Control Requirements Attachments

Status \*

DRAFT UNDER REVIEW **IN REMEDIATION** IN APPETITE TRANSFERRED

PARTIAL RISK ACCEPTANCE

Title \*

Cyberattack leading to ransomware encryption and this is an addition 68/255

Description

Completed 4 of 4

Core Information Completed 2 of 2

Risk Classification Completed 1 of 1

Ownership Completed 1 of 1

Control Requirements No Mandatory Questions

Attachments No Mandatory Questions

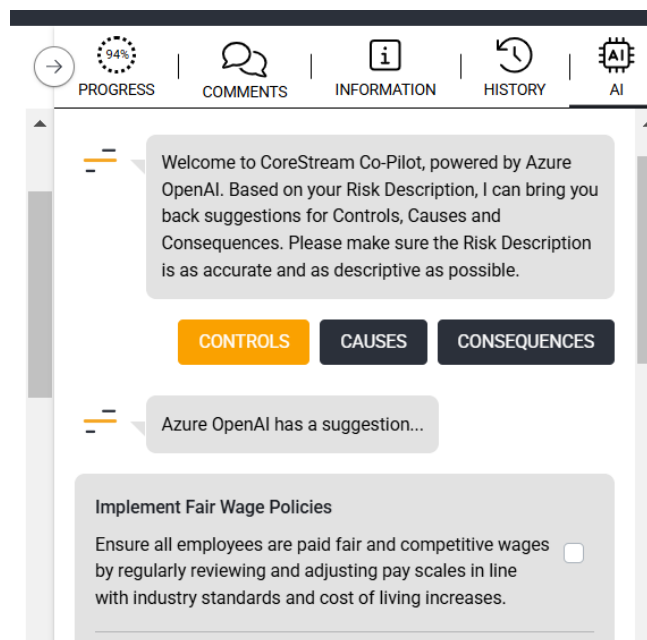
SAVE UPDATE CANCEL

## Integrations

## Ability to Switch Forms Co-Pilot Feature to Use Your Company's Azure OpenAI Instance

*Configuration Required*

Initially developed to integrate with ChatGPT, our Forms AI Co-Pilot feature now allows you to switch to your company's own Azure OpenAI instance. This gives you more control over the AI's responses while maintaining privacy and security within your own cloud environment. By connecting to your Azure OpenAI instance, you can ensure the AI operates in alignment with your company's specific needs and guidelines, offering a tailored experience for your users.



## Implement Caching of OAuth Access Tokens

*Configuration Required*

We've introduced caching for OAuth 2.0 access tokens, allowing tokens to be stored in the database or memory cache and reused within their validity period. This reduces the need to request a new token for each integration call, cutting down network activity and improving the speed of integration requests. Tokens can also be shared across multiple integrations using the same credentials, further enhancing efficiency and performance.

## Ability to Configure a Webhook for Clients Without Current Authentication

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### *Configuration Required*

To improve the process of receiving notifications from API providers, we've introduced the ability to configure a webhook that clients can use without requiring the current authentication method. Previously, clients had to follow a complex authentication flow using OAuth 2.0, but now we're offering a simpler, more secure option. Clients will receive a webhook URL, and we'll provide a shared secret that they can use to sign the payload using HMAC. The client can then include the signature in the request header (e.g., X-Signature). This ensures security while streamlining the integration process. We'll verify the signature on our end before processing the request, ensuring both simplicity and security for payload notifications.

## Technical

### **Upgrade to .NET 8**

*Automatically Added*

Microsoft .NET 8 is the latest version of a popular software framework used to build and run applications. In simple terms, it's the technology that helps our platform operate efficiently and securely. Upgrading to .NET 8 delivers improved performance, enhanced security, and advanced language features, ensuring our platform remains scalable, future-proof, and aligned with modern standards.

### **Upgrade to Identity Provider**

*Automatically Added*

We've upgraded our identity provider to enhance our security framework. The upgrade offers modern authentication protocols, improved encryption, and robust vendor support, ensuring our identity management remains resilient against emerging threats.

### **Upgrade to Latest AG Grid**

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*Automatically Added*

We've upgraded to the latest version of **AG Grid**, the advanced third-party grid solution we use for data display and interaction. This update brings improved performance, better handling of large datasets, and enhanced customization options. It also includes new features like advanced filtering, smoother scrolling, and accessibility improvements, ensuring a faster, more flexible, and user-friendly experience. Staying up to date with AG Grid helps us deliver a modern, reliable platform with the latest innovations.

For more information please contact:

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