



2.12 Release Notes

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01 Apr, 2025

Contents

1.0	Document Purpose	3
2.0	Platform Director Overview	4
3.0	Release Notes	5
3.1	Strategic Features.....	5
3.2	Core Features.....	7
3.3	Configuration Improvements	9
3.4	Issue Fixing.....	10
3.5	Integrations	12
3.6	Technical	12

1.0 Document Purpose

This document provides a summary of the highlights of the CoreStream Release 2.12 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.

2.0 Platform Director Overview

Release 2.12 introduces several powerful enhancements that strengthen both the analytical capabilities and user experience of the CoreStream platform.

At the forefront is our new **KPI Table Component**, designed to give users a highly flexible and visual way to aggregate and track key metrics across flat or hierarchical data structures. With built-in support for trend analysis - whether numeric, arrow-based, or RAG-rated - this component brings a new level of insight to operational dashboards.

Another standout feature is the ability to **generate calendar events and meeting invites directly from within the platform**. This makes it easier to stay on top of important tasks and deadlines by integrating reminders and meetings into your everyday tools - whether for yourself or across your wider team.

Alongside these, we've introduced a range of improvements focused on configurability, performance, and usability - from enhanced Single Sign On (SSO) group assignment rules and more flexible CSV export formatting, to smoother form navigation and validation handling. We've also continued our ongoing investment in accessibility, translation support, and audit logging to ensure the platform remains robust, inclusive, and enterprise-ready.

We're excited about the progress in this release and look forward to seeing how these new features support your goals. As always, we value your feedback and remain committed to continuously evolving the platform to meet your needs.

Rich

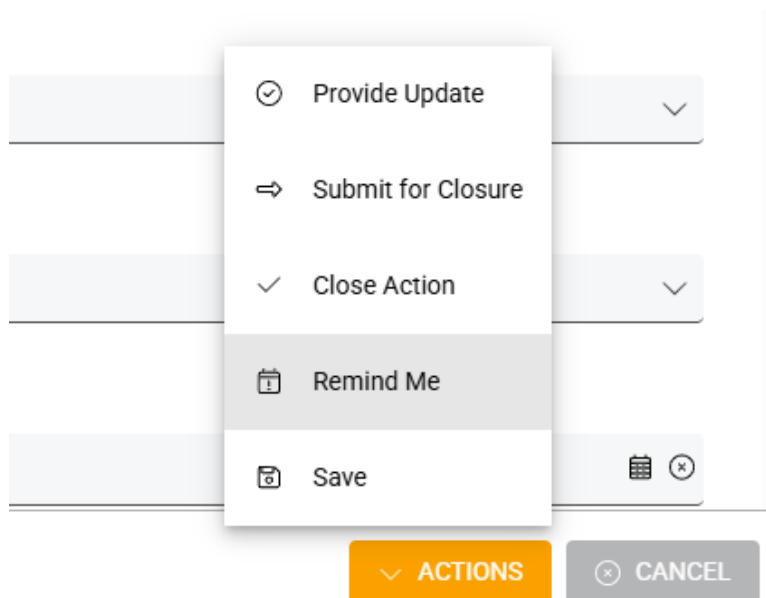
3.0 Release Notes

3.1 Strategic Features

Generate Calendar Events and Meeting Invites from the Platform

Configuration Required

We've introduced the first version of our platform-generated calendar event feature, making it easier to stay on top of important deadlines and follow-ups. For example, if you have a high-priority action due at the end of the month, the platform can now offer the option to send you a personal calendar reminder. It also supports generating meeting invites with multiple attendees. Looking ahead, future updates will explore the ability to include Microsoft Teams links and dynamically update calendar events when dates change in the platform - ensuring everything stays aligned.



Anonymizing Comments for External Users

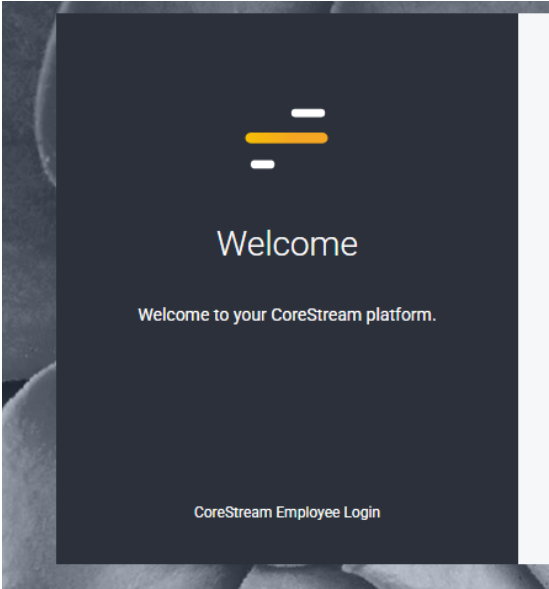
Configuration Required

We've added the ability to anonymize the identity of users leaving comments, with configurable rules to determine which user groups this applies to. This is especially valuable for clients managing third-party risk, where external users may need to complete tasks like questionnaires without seeing sensitive internal information or user identities. It helps maintain privacy and control while still enabling collaboration.

CoreStream Single Sign On (SSO) Name Configurable

Configuration Required

Previously labeled as "CoreStream Employee Login" by default, the button we use to access client environments for support and maintenance can now be renamed. This allows for better alignment with client branding or internal terminology preferences, offering a more tailored and discreet experience.



Increased Bulk Update Limit from 50 to 100

Automatically Added

Thanks to recent performance improvements, we've been able to safely increase the limit for bulk updates from 50 to 100 items at a time. This means users can now select and update more records in a single action without performance issues - streamlining workflows and saving time across the board.

New Log for Capturing Usage Information

Configuration Required

We've introduced a new log that can be surfaced through grids, exports, and reports, which tracks usage metrics such as time spent on screens/forms, number of clicks, and more. This feature allows us to better analyze user behavior and focus improvements on areas that may be challenging. Additionally, clients can use this data to gain insights into how their users are interacting with the system, including how much time they spend on specific tasks, like reading policies.

All Logs									
ID	COMPONENT ID	COMPONENT TYPE	COMPONENT NAME	USER ID	URL	START TIME	END TIME	ACTIVITY TIME	CLICK COUNT
87415	394f3c92-de7a-49...	grid	Release Notes	Cam McNair (Cam.McNair@corestrea...	https://int...	23 Apr, 2025 0...	23 Apr, 2025...	6	0

Configurable Single Sign On (SSO) Group Assignment Rules via Platform UI

Configuration Required

We've enhanced how group assignment works for Single Sign-On (SSO) users by moving this configuration from code into the platform UI. Previously, without full Active Directory sync, clients could only assign all SSO users to a single group - limiting flexibility. Now, our configuration team can define nuanced rules, such as assigning users to specific groups based on whether their email domain contains (or does not contain) a specified string. This update offers greater control and scalability for managing user access.

3.2 Core Features

New KPI Table Component - Powerful New Reporting Capabilities

Configuration Required

We're excited to launch our brand-new Key Performance Indicator (KPI) Table component - one of the most powerful additions to CoreStream to date! This new feature allows users to effortlessly visualize key performance data across both flat and hierarchical structures (e.g., Portfolio > Programme > Project). Track aggregated metrics like open risks, overdue actions, or average ratings, all in one place. Even better, you can now show real-time trends over time, with options like intuitive up/down arrows, RAG status indicators, or both. Powered by CoreStream's full version history, this feature takes reporting, performance tracking, and decision-making to the next level.

KPI Table			
Risk Register			
CoreStream HQ			
	ACTIVE RISKS	OPEN ACTIONS	CONTROLS
CoreStream HQ	10 (1)	12 (3)	7 (0)
London Office	7 (4)	9 (7)	7 (2)
Finance department	0	0	0
Client Delivery team	3 (1)	2 (1)	5 (1)
Bulgaria office	2	0	0
HIDE LEGEND			
TRAFFIC LIGHT RULES	ACTIVE RISKS	OPEN ACTIONS	CONTROLS
Green	< 3	< 3	< 3
Amber	3 - 5	3 - 5	3 - 5
Red	5 +	5 +	5 +

Continued Accessibility Enhancements Across the Platform

Automatically Added

As part of our ongoing commitment to accessibility, we've delivered another round of improvements in this release. These updates target specific areas such as keyboard navigation, missing text labels on form inputs, inaccessible button names, and missing alt text for images. We've also addressed keyboard traps to ensure smooth navigation for all users. Moving forward, each major release will be followed by an external accessibility audit to validate our progress and guide future improvements - ensuring the CoreStream GRC Platform remains inclusive and usable for everyone.

Select All Adjustment in Form Dropdowns

Automatically Added

We've refined the behavior of the "Select All" option in form dropdowns for a smoother experience. Previously, selecting all after a search would overwrite your existing selections with only the newly filtered results. Now, selections are appended instead—preserving your previous choices and making the feature far more intuitive.

Assignee: *

Tomasz Chioffi (tomaz.chioffi@corestream.co.uk) - (19/05/2025 - 23/05/2025) x

ca

Select All

Cam McNair (Cam.McNair@corestream.co.uk) - (02/05/2025 - 02/05/2025)

Paul Cadwallader (Paul.Cadwallader@corestream.co.uk) - (No Upcoming Holiday) Press enter to select

Choice Field Display Names Pulled into Emails

Automatically Added

To keep workflows and calculations efficient, we often store simplified internal values (e.g., "1", "2") for choice fields like impact sliders, while showing user-friendly display names (e.g., "1 (Very Low)", "2 (Low)") in the UI. In version 2.12, we've fixed a bug where emails were showing the internal values instead of the intended display names. This update ensures emails now reflect the correct, user-facing labels - eliminating confusion and improving clarity.

Making Word/PDF Exports Compatible with New Date Range Fields

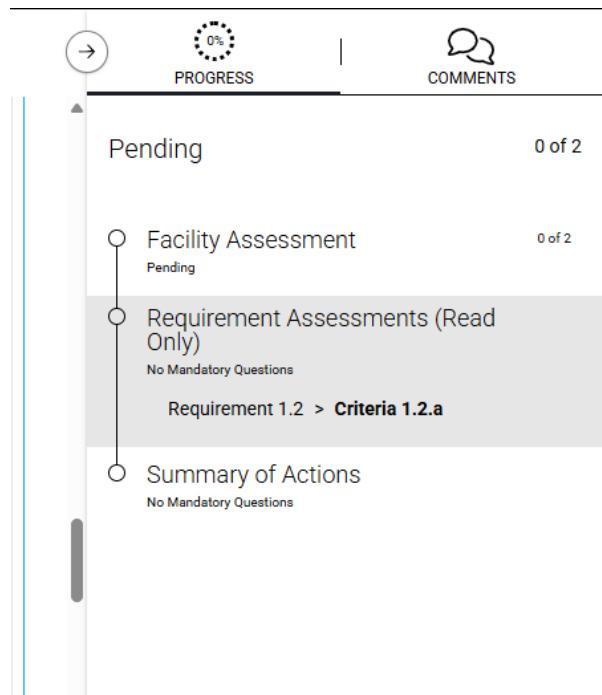
Automatically Added

Our recently introduced Date Range field - allowing users to select and store both start and end dates in one intuitive control - is now fully supported in Form-Based Word and PDF exports. Instead of displaying the start and end dates separately, exports will now render this field as a single, cohesive date range, making reports clearer and more polished.

Form Navigation UX Improvement

Automatically Added

We've enhanced the navigation experience for users working with long forms containing many sections and nested sub-forms. The side panel's progress view now highlights your current position and allows for quicker navigation. If you're inside a sub-form, a breadcrumb-style indicator will show exactly where you are, making it easier to stay oriented and move efficiently through complex forms.



Further Translation Support

Automatically Added

We've made additional refinements to our translation capabilities by addressing a few remaining gaps - most notably improving support for Chinese numbering and auto-generated notifications. These updates help ensure a more consistent and localized experience across all areas of the platform, particularly for our international client base.

3.3 Configuration Improvements

Subform Builder

Automatically Added

At CoreStream, we're always looking for ways to streamline configuration and reduce complexity. The new Subform Builder is a perfect example - designed to simplify and accelerate the setup of subforms, which can otherwise be a time-

consuming and error-prone task. By standardizing the most common settings, this tool allows our team (and yours) to generate reliable configuration with just a few inputs, dramatically improving speed and consistency.

Config UI Load Time Improvement

Automatically Added

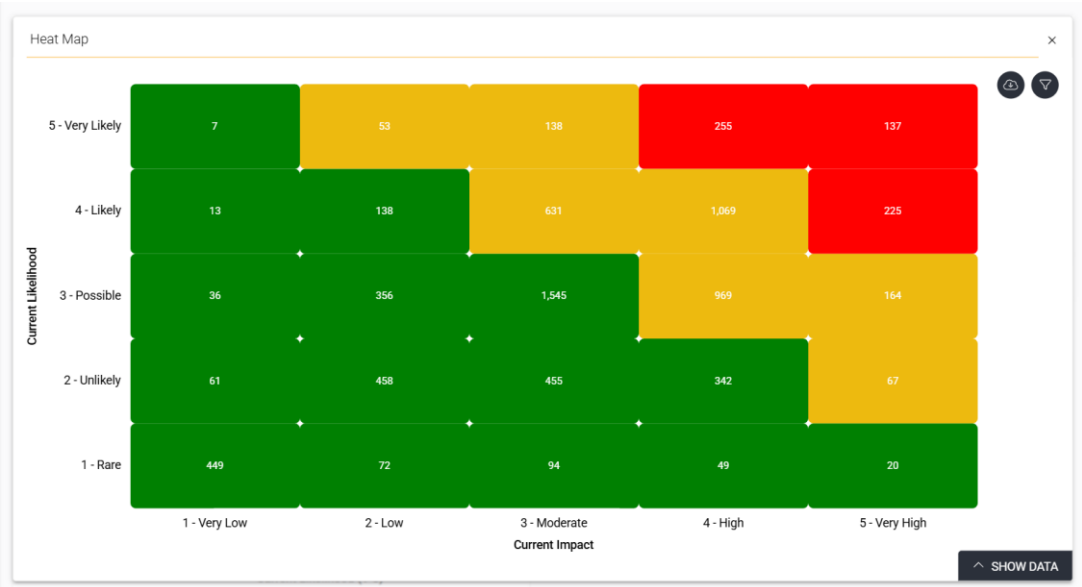
We’ve implemented performance enhancements to significantly reduce the load time of the Config UI. This makes it faster and more efficient for both our internal configuration team and clients using the Client Config UI, improving productivity and streamlining configuration work across the board.

3.4 Issue Fixing

Improved Scrolling Behavior for Expanded Dashboard Charts

Automatically Added

We’ve enhanced the user experience on dashboards with multiple charts by addressing an issue where expanding a chart didn’t lock the scroll. Previously, users could accidentally scroll the page and lose sight of the expanded chart, causing confusion. Now, when a chart is expanded, page scrolling is temporarily disabled to keep the focus on the content you’re viewing - making interactions clearer and more intuitive.



Improved Validation Messaging for Rich Text Field Names

Automatically Added

While it's not commonly used, our forms do support rich text formatting for field names - allowing for elements like bullet points and structured lists. In this release, we've resolved an issue where validation messages in the side panel were displaying raw HTML instead of the intended rich text formatting. This fix ensures that users now see clear, well-formatted messages when non-mandatory rich text fields are left unpopulated on save.

Fix for Favoriting Exports While Searching

Automatically Added

We resolved an issue that prevented users from favoriting an Excel export while using the search function. Favoriting exports now works as expected, even when filters or searches are active - ensuring smoother workflows and easier access to frequently used exports.

Improved UX for Rich Text Editor in Forms

Automatically Added

We've resolved a minor but noticeable UX issue in our WYSIWYG Rich Text editor used within forms. Previously, clicking into a rich text field caused the screen to jump slightly, which could be disorienting for users. With this fix, the editor now behaves more smoothly and predictably, creating a cleaner and more intuitive experience when editing content.

Validation Fix for Expandable Sub Forms

Automatically Added

We've resolved a validation issue affecting expandable sub forms - those pop-out forms that allow isolated editing and saving. Previously, if both the sub form and main form had validation enabled, users could be blocked from saving the sub form due to hidden, but incomplete, fields in the main form. With this fix, sub form validation is now handled independently, ensuring a smoother, more intuitive experience.

← 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

PROGRESS COMMENTS HISTORY

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

3.5 Integrations

More Control Over Formatting of Platform-Generated CSV Files

Configuration Required

Our data export feature - used to query platform data and deliver it as a CSV file via email or to a client's server - has just gotten more flexible. We've introduced additional formatting options to give clients greater control over how the exported data appears. Looking ahead, we're also adding the ability to convert these CSV files into Excel format in the next release, offering even more versatility in how exported data can be used and shared.

Automated Alert to Clients When Their Integrations Return an Error

Configuration Required

We've introduced automated email notifications that alert clients when one of their integrations returns an error. These alerts can be configured to go to a specific mailbox, helping ensure issues are identified and addressed promptly without needing to rely on manual checks. This supports faster troubleshooting and improved reliability of client-owned integrations.

3.6 Technical

Syncfusion Upgrade and Export Fixes

Automatically Added

We've upgraded Syncfusion, the third-party tool we use for Word and PDF exports, to benefit from ongoing improvements and vendor support. This release also includes fixes for two export-related issues that we reported directly to Syncfusion - both of which were affecting client outputs and are now resolved. This ensures more reliable and consistent export functionality across the platform.

Configurable Lockout Threshold for Failed Logins

Configuration Required

We've added flexibility to our platform's security configuration by making the number of failed login attempts before user lockout configurable. Previously fixed at three attempts, this setting can now be adjusted to better align with individual client security policies or preferences - whether that means a more lenient threshold or a stricter one for added protection.

**For more information
please contact:**



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