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3.0 Release Notes

Release available from:

01 Jun, 2025

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1.0 Document Purpose

This document provides a summary of the highlights of CoreStream Release 3.0.

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 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 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.

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2.0   Platform Team Overview

This release marks a significant milestone for CoreStream - not just in terms of features, but in how we present ourselves to the world. With the move to version 3.0, we have fully rebranded the CoreStream platform to align with our new, modern identity.

Among the headline features is our brand-new Risk Flightpath visualization - a powerful new way to track and plan the journey of a risk from current to target score, with clear visibility of intermediate actions and due dates. It gives users a much sharper picture of how risks are being managed over time and how plans are working to mitigate the risk.

We have also taken a major step forward in usability with direct editing of SharePoint attachments – a feature a number of clients have requested and demonstrable proof that we are listening! Users can now open and edit files directly in their browser or native applications, with changes saved automatically to the live document - no more downloading, editing, and re-uploading. Even better, we're actively exploring how to bring this same slick experience to all CoreStream attachments.

Beyond these highlights, the release delivers improvements across the platform - performance boosts of up to 40x in complex form save scenarios, smarter grid and export controls, enhanced logging for reviewing complex workflow processes, more helpful user manager email behavior on UAT sites, and continued refinement of configuration tools for both our team and yours.

As always, thank you for your continued partnership and feedback. We are excited about where the platform is heading and look forward to seeing the difference these new features make in your day-to-day work. As ever, please do keep the feedback coming. It is what helps us improve.

Rich & Cam

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3.0   Release Notes

3.1   Strategic Features

**Brand New Flightpath Visualization**
Configuration Required

We have added a new visualization to our suite: the Risk Flightpath chart. This powerful view plots a risk's Current Score, the Target Score, and any Intermediate Scores along the way — each tied to the mitigating actions intended to achieve them.

It allows users to visually track the planned reduction in risk over time, assess whether the target is realistic, and identify any potential gaps in the mitigation plan.

The Flightpath chart is especially powerful in steering risk conversations toward accountability and forward planning. If all your intermediate milestones have no actions assigned (or have actions that are overdue), it becomes immediately obvious.

This feature adds transparency to risk treatment strategies, making it easier for risk owners, auditors, and senior stakeholders to monitor progress and confidence levels at a glance.
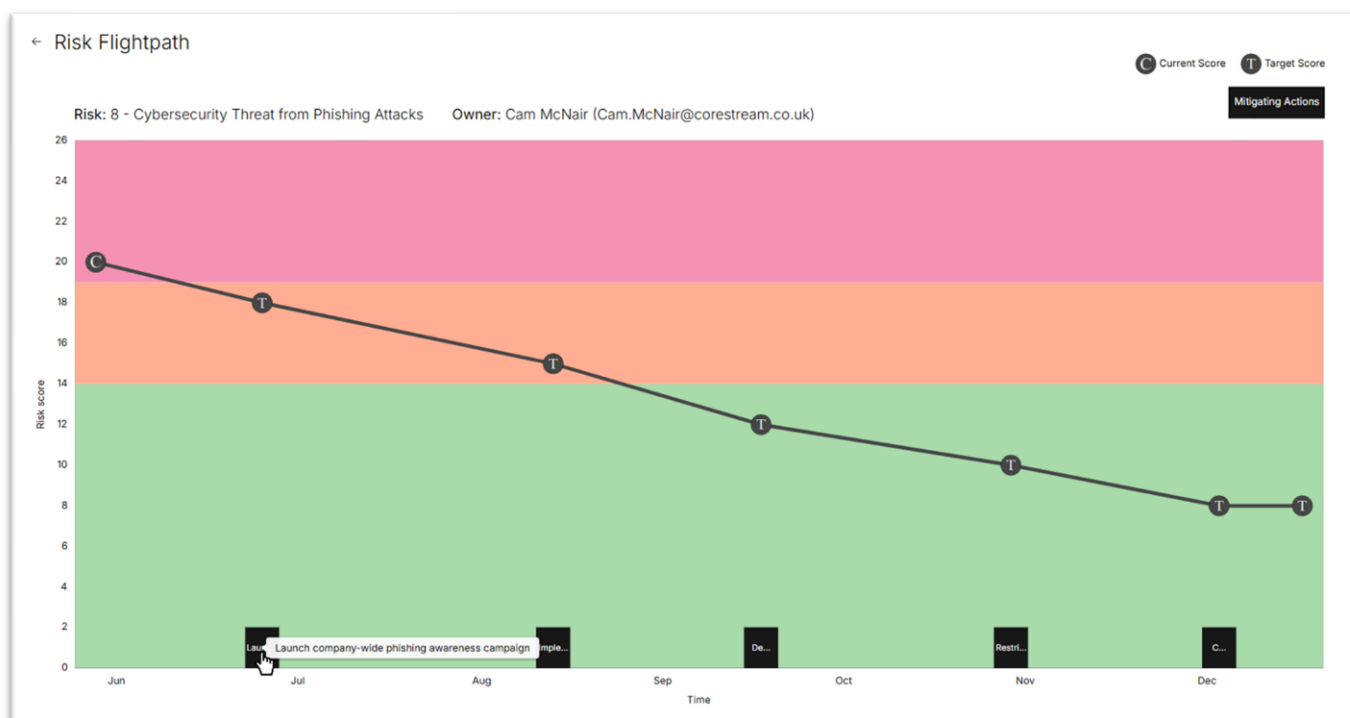
Countdown Timer on Lockout Screen
Automatically Added

To reduce confusion and unnecessary support tickets, we have introduced a visible countdown timer on the account lockout screen. If users enter their password incorrectly too many times (typically 3, though this is configurable), their account is temporarily locked (usually for 5 minutes). The new timer clearly shows how long remains before they can try again, helping users understand there's no need to contact support - just wait and retry.
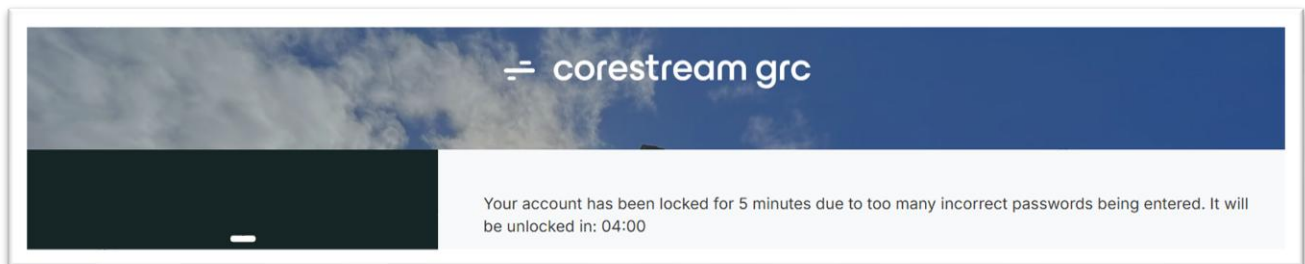

More Grid-Level Control Over Column Selector and End User Export Wizard
Configuration Required

By default, field visibility in the Column Selector and End User Export Wizard is controlled globally, allowing for efficient and consistent configuration across the platform. However, we have heard from users that there are scenarios - such as when a single table is reused for multiple purposes - where more granular control would be helpful.

In response, we have introduced the ability to define which fields appear in these tools on a per-grid basis. This means that, in addition to the globally configured settings, each grid can now include its own tailored field visibility.

Importantly, no change is required if you don't need this - by default, the global settings still apply.
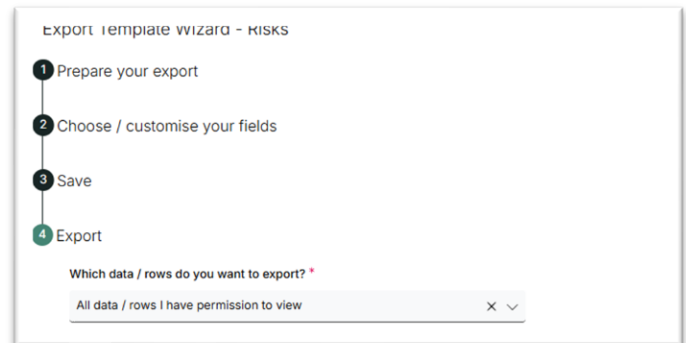
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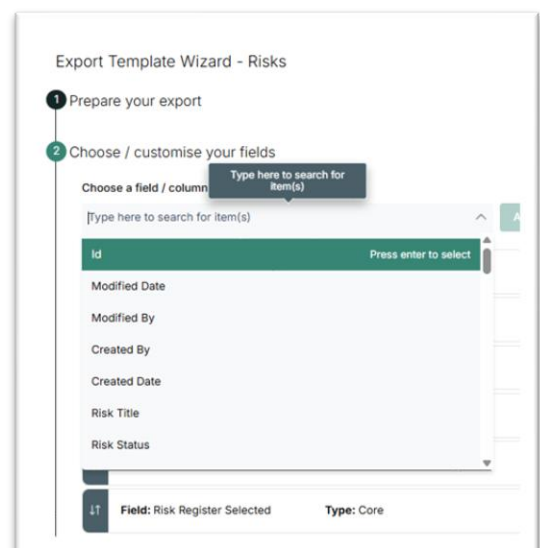
Grid-Level Control Over Row Exports for "All Data / Permitted Rows"
Configuration Required

Building on our new column-level export controls, you can now also configure which rows are included when users choose the "All data / rows I have permission to view" option in a grid export. This per-grid setting lets you tailor exports for scenarios where a single table serves multiple purposes - ensuring each export only contains the relevant subset of records without altering global permissions.

This enhancement provides greater precision and autonomy for report authors, reduces the need for manual filtering after export, and helps maintain data clarity for end users.


3.2   Core Features

Version History Now Hides System-Generated Changes by Default
Automatically Added

Every change in CoreStream is tracked and fully traceable through version history. However, system-generated updates (while legitimate) can sometimes clutter the view and make it harder to identify meaningful user-driven changes.

To improve clarity, we have added a toggle to the "View Versions" interface that allows users to show or hide system-generated versions. By default, these are now hidden, making it easier to focus on the updates that matter most.

This small but impactful change helps streamline auditing and simplifies understanding of how and when key data points have changed.
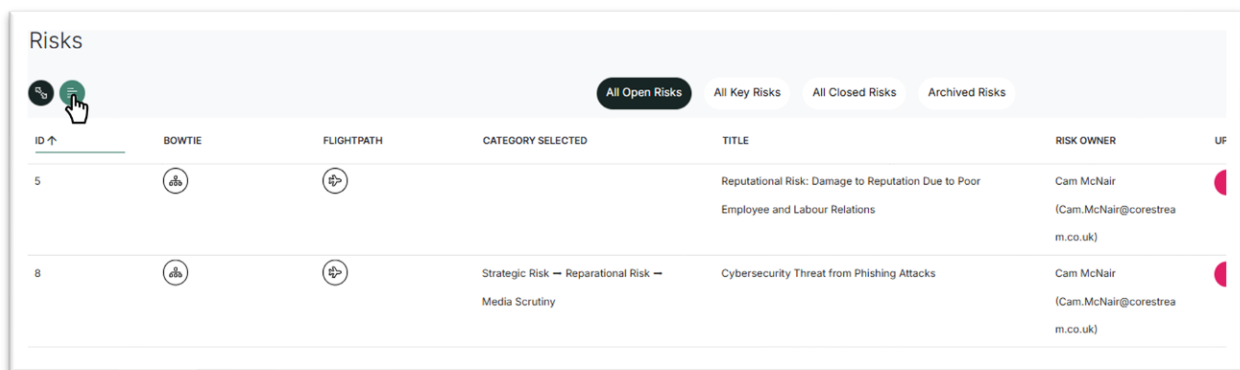
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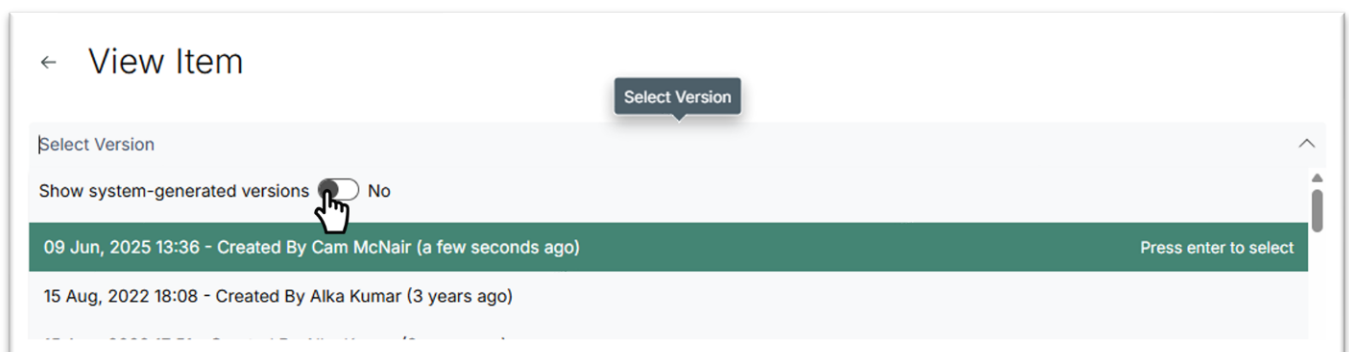
Optional Grid Text Wrapping with User-Level Preferences
Automatically Added

Text wrapping has been a long-standing request - especially from users familiar with our legacy platform, where it was always on by default. While wrapping can be useful, it is not always ideal for every layout. So, we have introduced a flexible, user-friendly solution: a new "Wrap Text" toggle on grids.

Clicking this button will wrap text within cells based on column widths, improving readability where needed. And best of all, your preference is remembered just for you - no impact on anyone else's view, keeping things tailored to your workflow.


Improvements to the Data Import Tool
Automatically Added

We have enhanced the flexibility and resilience of our Data Import Tool. While it has long been a core part of our internal workflow and more recently opened up for client use, it previously required a deep understanding of both the incoming data and the existing system data - making it harder to get it right the first time.

This update introduces smarter handling of edge cases. For example, if duplicate records already exist in the system but you are not trying to update them, they will no longer block the import. Similarly, if records with null keys exist but you are not importing null values yourself, the tool will now proceed without issue.
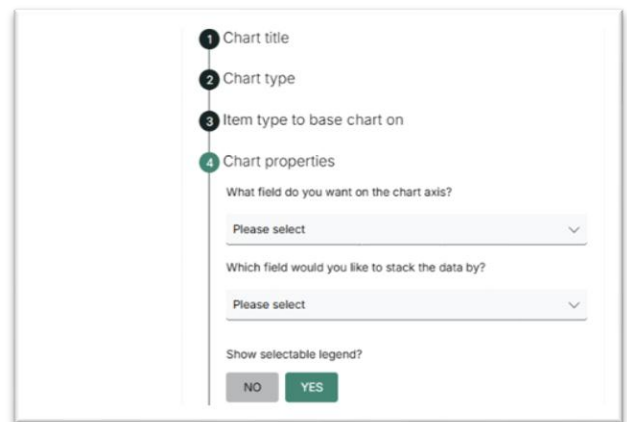
These improvements reduce false positives and make importing data faster, more intuitive, and less prone to disruption - while still protecting data integrity when updates do need to be precise.

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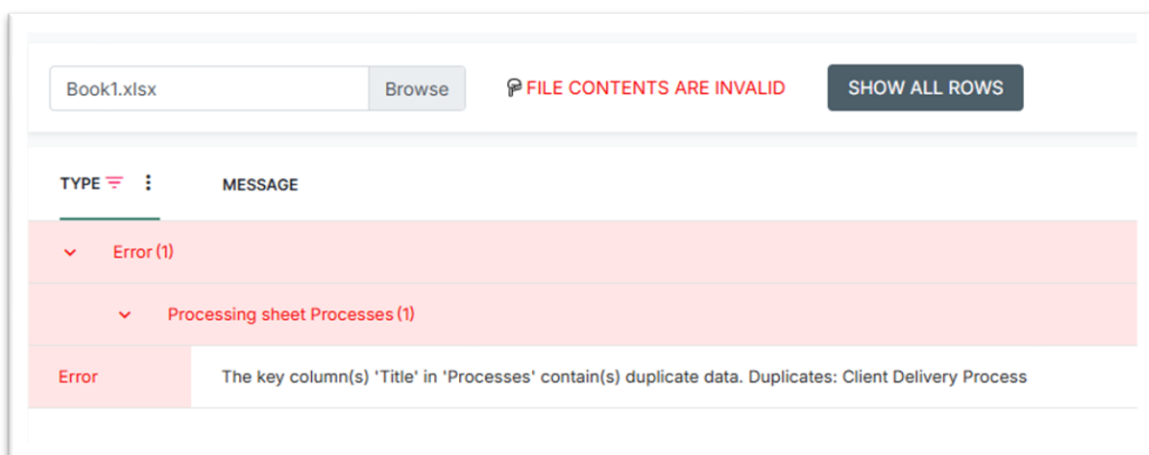
Admin User Reporting - Legend Visibility Now Configurable
Automatically Added

For applicable charts within the Admin User Reporting Wizard, we have added a new property that allows users to toggle the chart legend on or off as needed. Previously, this required manual intervention by the CoreStream team - now, clients have more control and flexibility to tailor reports to their needs, independently.

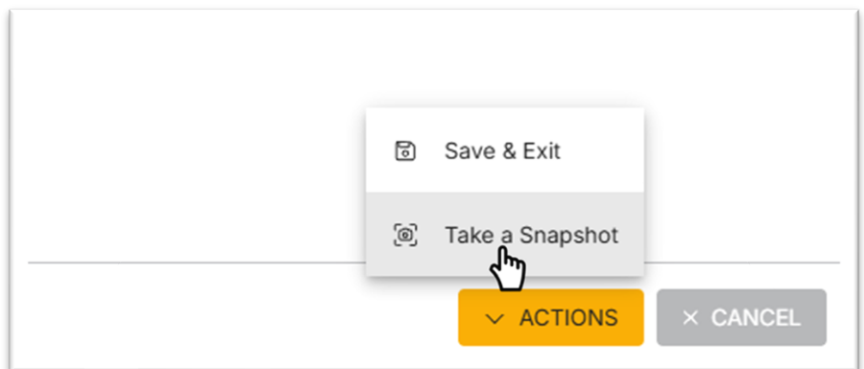## New Lightweight Snapshotting Functionality
Configuration Required

CoreStream has always supported data snapshotting - capturing a point-in-time copy of selected data - but doing so traditionally requires a separate dedicated table with aligned fields, forms, and workflows. While powerful, this method added complexity.

Now, leveraging our full version history tracking, we have introduced a streamlined, lightweight snapshotting feature. At any configurable point in time, a snapshot can be triggered that stores references to the relevant version of data.

These snapshots can then be surfaced in forms as read-only repeaters or sub forms, giving users an easy and efficient way to view historical data states without the overhead of duplicating entire configurations.

This simplifies configuration, improves performance, and makes historical visibility far more accessible.

Shareable Links to Pre-Filtered Dashboards
Automatically Added

We have introduced the ability to generate and share links to dashboards that retain any global filters applied at the time of sharing. This makes it easier to collaborate and direct colleagues to specific filtered views - saving time and reducing confusion.

One important note: these links will always respect the underlying permissions of the recipient's account. In other words, users will never gain access to data they are not authorized to see, even when using a pre-filtered link.
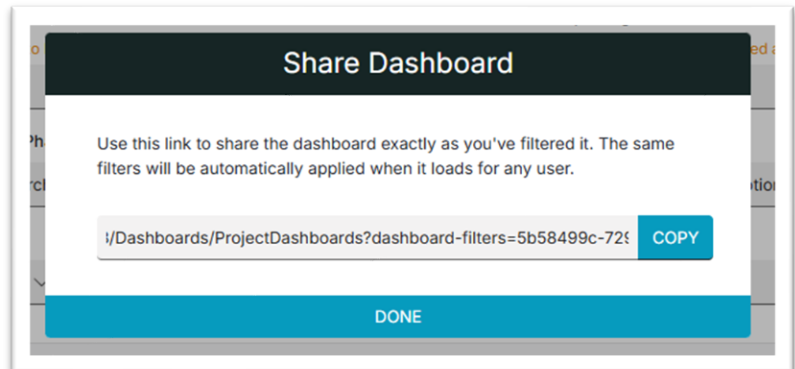
3.3   Configuration Improvements

Workflow Logger
Automatically Added

CoreStream's flexibility in configuration is one of its strongest features, allowing us to meet client requirements without new code. However, as workflows become more interconnected and complex, it can be challenging for Configurators to trace every step. Our new Workflow Logger, when activated, records each step during a workflow run or item save.

For example, when closing an Audit Action, the logger shows the sequence of updates including changing the action status, updating due statuses, checking related actions, and adjusting the audit status accordingly. This feature provides clear, step-by-step visibility into workflow processes, making troubleshooting and configuration easier.

User Manager Emails Now Always Sent to Users
Automatically Added

When working on Configuration or UAT sites, we typically operate in Debug mode. One advantage of this is that platform emails are rerouted to a test mailbox, preventing test data from reaching real users - especially helpful when dealing with things like daily summary emails that could otherwise be sent to hundreds of recipients.

However, this setup has made setting or resetting user passwords during testing a bit clunky, often requiring Support or project teams to manually forward the relevant emails.

This has now been streamlined. User Manager emails (such as those for setting or resetting passwords) will now always be sent directly to the user, regardless of whether the site is in Debug or Release mode. This should make user access setup during testing faster and smoother.

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Sub-sections in the Form Configuration UI
Automatically Added

With great flexibility comes a lot of configuration options - and over time the Forms Configuration UI has grown in complexity as we have introduced more features. To make this experience more intuitive, we are introducing a more structured layout using sub-sections and conditional display logic to hide irrelevant settings.

This update starts with Forms and is part of a broader effort to make the configuration process faster, cleaner, and easier to navigate. It is a win for both the CoreStream team and our growing community of clients who are actively managing their own configurations.
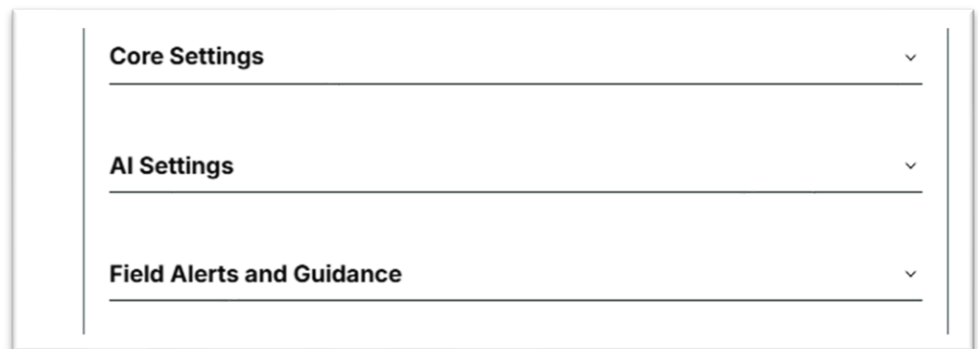
Site Builder Improvements - Reference Data, Actions and Risks
*Automatically Added*

We have enhanced the Site Builder tool, which helps streamline and standardize the site creation process while reducing the risk of human error. Previously, Site Builder could only generate a default table with a basic set of fields, forms, grids, and tabs. It now supports additional templates for common use cases, including Actions, Risks and Reference Data collection. These templates come preconfigured with commonly used functionality such as complete workflows and background services, helping us deliver client configurations even faster.

3.4   Issue Fixing

Improved Text Wrapping in Repeater Headers
Automatically Added

Previously, text wrapping in repeater headers was based on a strict character limit, often breaking words awkwardly across lines and reducing readability. We have implemented smarter wrapping logic that respects word boundaries, making headers cleaner and easier to scan.

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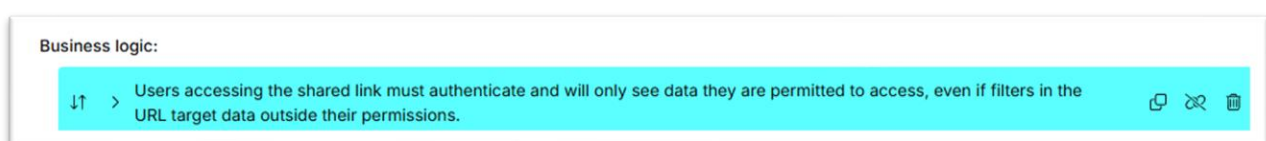
Optional Separator When Cascading into Text Fields
Configuration Required

Cascading values from an associated record into the current one is a well-established CoreStream capability. What is new is the ability to configure a custom separator when cascading into text fields.

For example, if you are populating a field with the titles of selected Risk Categories (from a hierarchy), you can now define how each value is separated - whether by arrows, comma, pipe, or something else - to make the result more readable and easier to process.

Improved Usability of WYSIWYG Rich Text Fields
Automatically Added

WYSIWYG (What You See Is What You Get) fields allow users to apply rich formatting in forms - ideal for adding structure and emphasis to content. However, because this is powered by a third-party plugin, we have historically had limited control over its quirks.

A common frustration has been the need to click twice: once to activate the field and again to position the cursor. We have now smoothed out that experience - by activating the field on hover, the first click will now place your cursor exactly where you intended, making editing faster and more intuitive.

3.5   Integrations

SFTP Exports Now Support Excel Format
Configuration Required

Previously limited to CSV format, SFTP exports - which allow CoreStream to send data to a pre-defined location on our or a client's server (and/or via email) - can now deliver files in Excel format. This enhancement gives clients more flexibility in how they receive and work with exported data.

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Configurable Wording for SharePoint Attachment Links
Configuration Required

Previously, the link text used in SharePoint attachment fields (used to direct permitted users to the underlying SharePoint folder) was hardcoded and not customizable.

With this update, you can now configure that link text to suit your specific use case or tone of voice, offering greater flexibility in how file access is presented to users.

Enhanced Functionality with SharePoint Attachment Fields
Configuration Required

As an alternative to CoreStream's native attachment fields - where files are stored on the CoreStream platform - SharePoint-integrated attachments allow files to be saved directly to a client's SharePoint site, giving them full control and access to native SharePoint functionality.

We have expanded this feature in two significant ways to enhance the user experience:

1. Multiple SharePoint Attachment Fields: It is now possible to include multiple SharePoint attachment fields on a single form, with each one configured to drop files into its own designated subfolder.
2. Direct In-Browser Editing: Most excitingly, users can now click on a file to open it directly in SharePoint for in-browser editing. Any changes are auto-saved to the live version - no downloading or re-uploading required. This helps eliminate scattered outdated versions across local machines and streamlines the editing process.

3.6   Technical

Direct Editing of Attachments - Proof of Concept
Configuration Required

As mentioned above, we have enhanced our SharePoint/OneDrive integration to allow attachments to be opened directly in a browser tab - enabling users to view and edit live documents, with changes saved automatically, eliminating the need to download and re-upload files.

Building on that progress, we are actively working on a proof of concept to bring similar functionality to standard CoreStream attachment fields. That means the potential to open, edit, and save files directly from within the platform, even outside of a SharePoint setup.

The early results are promising - so watch this space for future updates!

Significant Performance Gains on Form Saving
Automatically Added

We have made a small but impactful change that delivers significant performance improvements when saving forms with large numbers of sub-forms (including nested sub-forms). By no longer storing the form configuration for each repeater and instead retrieving it dynamically, we have seen save time improve by up to 40x in the slowest cases. This enhancement dramatically improves the experience for users working with complex, data-heavy forms.

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Grid Refactor to Allow for Re-Using Columns
Automatically Added

As we progress towards requiring a minimum set of fields to store data in a table - and removing the need for syncing - we have done some behind-the-scenes refactoring of our grid component. This lays the groundwork for us to re-use the same column multiple times for different display purposes.

For example, if an Audit Findings table links to a parent Audit, you might want to show multiple properties from that parent Audit in the Findings grid: the Auditor, Audit title, Audit as a clickable content bubble, Audit description, and more. With this refactor, we can now support those scenarios using a single underlying lookup column, reducing complexity, and paving the way for more powerful, flexible grids.

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