CSS WIKI

Contract Insight Version 17.11.0



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Getting Started in the CobbleStone System

Getting Started in the CobbleStone System

Items System Admins need to know while setting up and getting to know the system

1. Departments/Divisions

Departments/Divisions are crucial to contracts, requests, workflows, etc. With this, users may see to which department does a contract belong. For example, is it tied to finance, accounting, management, and/or marketing? As well, these Departments/Divisions may be useful for an organization's employees/users. So, system administrators may assign some people to different departments, allowing us to reference back to the system as need be to find this information. Down the road, departments may be especially useful regarding permissioning. If someone has the permission to view their department's contracts, if they are assigned to the finance department, they will only be able to see the contracts where finance is assigned as the Department/Division. As will be discussed later, departments can be reported on as well. Users (dependent on permissions) may pull reports, for example, of a certain department's contracts expiring in a number of days. To create/view/delete departments, navigate to **Manage/Setup**, then **Departments/Divisions**.

---

2. Employees

Departments/Divisions may be utilized to keep track of different groups of employees, so employees will be the next area discussed. The system may be used to not only track contracts, but employees as well. Employees may be assigned to contracts, receiving alerts and taking appropriate actions when necessary. Additionally, the system can be used to keep track of employees and house important documentation regarding employee records with files/attachments able to be added on the *Details* screen. This employees area is critical when it comes to creating/keeping track of those who are users of the system.

For example, your system will have 5 users. You want to keep track of ~100 employees, but only 5 of which will be logging into and utilizing the Contract Insight environment. To add users and employees alike, navigate to the **Employees Dropdown**, then **Add Employee**. If adding an employee (this is somebody who will NOT be logging in), fill out the desired fields, then click **Save & Continue** when complete. Upon saving, the user will be taken to the *Details* screen, where additional information may be managed. If adding a user (who WILL BE logging into the system), select the **Active User** dropdown to **Yes** on the add screen. As well, give the user a username and password (if not utilizing SSO). It is always best practice to select **Force Password Reset on Login** to **Yes** to alleviate any security concerns. This assures that the user will create their own password upon logging in for the first time.

When discussing employees vs. users, the most frequently asked question is, well, what is the difference between an employee and a user? We're glad you asked! As stated, employees CANNOT log in to the system, whereas users CAN. Therefore, users will be given login credentials and employees will not. In addition, users will actively take up a license, whereas employees (where **Active** is set to **No**) will not take up a license. It is important to note that even though employees cannot log in, they may still receive reports. Users can assign new or existing Ad-Hoc reports to employees/users alike, where reports will appear as an Excel sheet attached in an email. Although most commonly tracked in a separate HR system, employee documentation may be tracked in the Contract Insight system, ranging from executed contracts to onboarding documents.

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3. Counterparties

Counterparties (also known as the vendors/companies/providers a respective company is doing business with) are very important to keep track of, especially pertaining to contract records. In the out-of-the-box system, to add a new company, click the **Companies** dropdown, then **Add Company (Supplier/Customer)**. Here, users can fill out the appropriate fields and, after clicking **Save & Continue**, add any important files/attachments to the counterparty record. As well, the system can house important points of contact for the counterparty, addresses, and more.

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4. Master Reference Data

Master Reference Data, also referred to as MRD, consists of things like statuses, types, locations, and categories. When building out the initial system, users are encouraged to add the statuses they will be working with, which can work in tandem with workflow. For example, the status of "pending" is completely different than "pending finance approval". Therefore, it would be desirable to add statuses where necessary. Additionally, your company may only have a few record types that apply, with some not included in the out-of-the-box system. Under **Manage/Setup** and **Record Types**, users can make tweaks to existing record types, create new types, and/or delete record types that may not apply. Statuses and Types are mandatory items to have when creating a contract record, so these items should be carefully considered while setting up your Contract Insight system.

Locations, categories, and occurrences are not mandatory, but can be tracked in the system. These items do not necessarily drive any kind of functionality but may be useful for reporting purposes (ex: finding every contract where the category selected on the contract record is *advertising*).

---

5. Fields

Fields are, in many ways, the "bread and butter" of the system. When creating contracts, requests, employees, counterparties, etc., we fill out fields to keep track of important information in the system. For example, Contract Title is a field, so is Expiration Date. With that being said, the system provides an excellent starting point of generic fields, but more may be added depending on the needs of the user/company. As a hypothetical, if we're in the car sales industry, we could add Horsepower as a field, as well as Sale Price and a dropdown box specifying if the car is pre-owned or new. To do this, navigate to **Manage/Setup**, **Field Manager**, then **Manage Fields**.

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6. Fields by Type

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Continuing the discussion on fields, fields by type is also an incredibly important area especially because we may be dealing with multiple different contract types. For continuity's sake, we will stick with the car sales example. Tracking the sale of a car is one kind of contract, but there may be other contract types where the fields of horsepower and sale price may not apply. In this case, system admins may create fields by type. To access this area, click **Manage/Setup**, **Field Manager**, then **Manage/Assign Fields by Contract Types**. Please note that fields may not only be changed by *contract* type in this area, but for counterparties, requests, and/or solicitations (if purchased) as well.

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7. Sub-tables

Sub-tables can be described as multiple iterations of the same thing on a record. For example, on numerous record details screens, there is a files/attachments area which is a prime example of a sub-table. Everything added will be, simply speaking, a file/attachment. However, there will more than likely be numerous different files/attachments, making them different iterations of files/attachments. As well, think of sub-tables as fields that can be tracked time and time again. An executed contract was added as a file three years ago, and we've since uploaded a new, executed contract. Instead of overwriting the old contract file, we have simply added a new one. Therefore, we can still track the old file by not deleting it altogether, but we've simply added a new one so users may still reference the old file if need be. Additionally, sub-tables are helpful when multiple sets of data are needed to be tracked on a record, such as tracking data regarding multiple audits or compliance requirements related to a contract. In an enterprise system, some out-of-the-box sub-tables may consist of files/attachments, Price/Cost Line Items, Budget/Funding Line Items, Hierarchies, and more. Sub-tables may also be created in an enterprise system (and where purchased) to track important areas that your company finds useful.

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8. Requests

Requests may (but do not have to be) used in the systems of many clients. Importantly, requests may follow workflow steps similar to a contract, but can be used as an initial phase. When describing requests, it is best to think of these as a request for a contract to be created, a request for a counterparty to be created, and so on. System Administrators and/or members of a "review group" will be able to change the status of the request, and from there may create a contract, vendor, employee, etc. from the request record. Requests may track fields, sub-tables, and more just like contract records. Requests are found by clicking the **Requests dropdown**.

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9. Workflow

Workflows may be set up to create a process in which contracts, requests, and more will follow to be considered "active". If a contract has to go through financial review, then managerial review, and lastly, legal review, the user would utilize the workflow area. Admins can create workflows to build off field updates amongst other things that help to automate the approval/rejection process, giving modules a smooth process in every single step of the record's lifecycle. Since workflows are never a one-size-fits-all area, we strongly recommend reaching out to your assigned implementer to discuss/set up a workflow process, especially since workflows can get very complex. For more information on these workflows inside the Wiki, click here.

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10. Ad-Hoc Reports

Ad-Hoc reports are incredibly useful for new and old systems alike. A good amount of Ad-Hoc reports will come with new systems, with the ability to create/edit/delete as needed. Ad-Hoc reports are found by navigating to **Reports/Searches**, **Ad-hoc Reports/Searches**, and **My Ad-Hoc Reports/Searches**. These reports give users (permissions permitting) the freedom to create detailed reports based off a set of custom filters/conditions on an as-needed basis. Reports may be created to track contracts over $1,000. For the sake of adding additional conditions, these reports may be further specified to contracts belonging to finance, for example, over $1,000, expiring within the next month. These reports may be as simple or as complex as the user desires. As well, Ad-Hoc reports can be assigned to others on a recurring basis. If someone needs to receive a monthly report of a certain department's contracts over a specified dollar amount, these reports allow us to do so. Further, these reports can be sent to employees as well as users, so people do not have to log in to see the details of the report, but can do so right from the emailed report if they are assigned in the **Assigned To** area.

Please note that we do not recommend deleting much of anything within the system. Reason being, it is never wise to delete things that may be useful to track down the road. If we need to later reference a record, it needs to exist in the system, even if it is expired. Regarding Ad-hoc reports, it is difficult to know what reports are/are not being used, so deleting any may first have to be discussed with the other users of your system.

11. Dashboards

Dashboards are an incredibly unique area within the system that allows system admins/users to create spaces for themselves or other groups of individuals built on relevance and, sometimes, creativity. The most common as well as most user-friendly dashboards are called *Legacy Dashboards*. These dashboards can hold three different pieces of information called docks, button tiles, and summary tiles.

1. Docks normally take up a larger portion of the dashboard and can house Ad-hoc reports, websites, your calendar, and more. If Ad-Hoc reports are stored here, the user is free to search through the report right from the home screen.
2. Button tiles are seen on the top row and can hold internal and external links within them. These button tiles could take us to this Wiki, our own website, a certain area of the Contract Insight system (such as the Add New Contract area), or somewhere completely different that we visit on a common basis. These tiles can be mixed and matched as desired and color patterns can be toggled to the user's specifications.
3. Summary tiles are below button tiles which are used to hold Ad-Hoc reports, summarizing *key integer fields*. This is important because if an Ad-Hoc report does not contain an integer field, it will not be selectable for placement on the dashboard as a summary tile. Expiration reports or $1k contracts are good examples of items that *can* be housed here.

Types of Dashboards

Dashboards can either be created as **Personal** or **System** dashboards. With personal dashboards, these *cannot* be assigned to others. These are for the use of the creator only. System dashboards *can* be assigned to others. These would be useful if they summarize key areas for a certain department/group of employees, as we could later assign to whomever may find the information relevant.

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With Cobblestone's Contract Insight system, users with permissions to do so may also create graphical dashboards. These dashboards can house charts and graphs which can change depending on the information the user selects. Graphical dashboards can get complex in regard to configuration, so if you would like to configure/create these, please reach out to your implementer for help. Some graphical dashboards come with the out-of-the-box system.

---

12. Document Templates

Document templates are an extremely effective tool that can save time on vast amounts of records. With these templates, users can select which fields, clauses, sub-tables, and other areas they want pulled over onto the template. For example, whenever we have a document template being used on a contract, if we have the mergeable field of Contract Title, instead of manually inputting the contract title ourselves, we can tell the system to do that for us. As well, we can set rules around when these templates may be used. For example, some templates may only be used on NDA's, whereas others may be used for all other record types. As these templates may get difficult to configure, please feel free to reach out to your implementer for help if need be.

---

13. Security Groups & Permissions

The Contract Insight system may hold confidential information that even some users should not be able to see. With Security Groups, these allow us to build out groups in the system and assign permissions to them. To access these Security groups, click **Manage/Setup**, then **Manage Security Groups**. From here, System Administrators can build out groups and assign the desired permissions, creating different groups for different levels of employees. Not only can Security Groups be created to assign permissions (and later, employees) to, but they can also manage permissions on an employee level. To do this, simply navigate to an employee details page, click **Manage Permissions** and then assign additional permissions to that specific employee *in tandem* with their existing permissions.

Types of Licensing with Permissions

Please note that permissioning may work differently depending on what kind of licenses were purchased.

Accessing Support

Accessing support is easy to users of CobbleStone's Contract Insight system. To submit a ticket, please follow the listed steps here. This walks the user through the process of submitting a ticket and/or feature request, which are both added using the same steps.

Please feel free to reach out to your respective salesperson/trainer/implementer. We are always happy to help!

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Legacy Helper Applications

Legacy Helper Applications

CobbleStone Software Helper Applications

Welcome to CobbleStone Software's Helper Applications page of the Documentation Wiki. All of our Contract Insight clients are free to use the helper applications provided on this page. Each of the links below will install an application on your computer through Microsoft's ClickOnce Install. To manually update any of the below applications, click **Install Now** for the applicable application. New versions can be found here.

CobbleStone PC Helper App
(replaces Enterprise File Utility)

INSTALL NOW
CHECK REQUIREMENTS

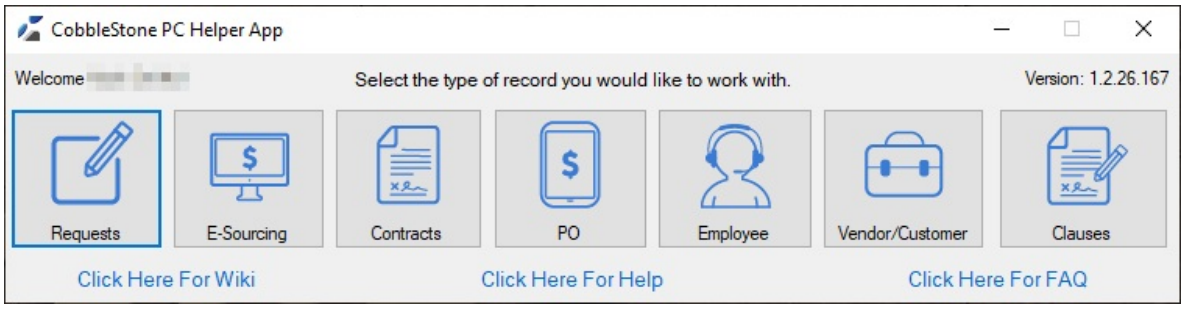
Description:

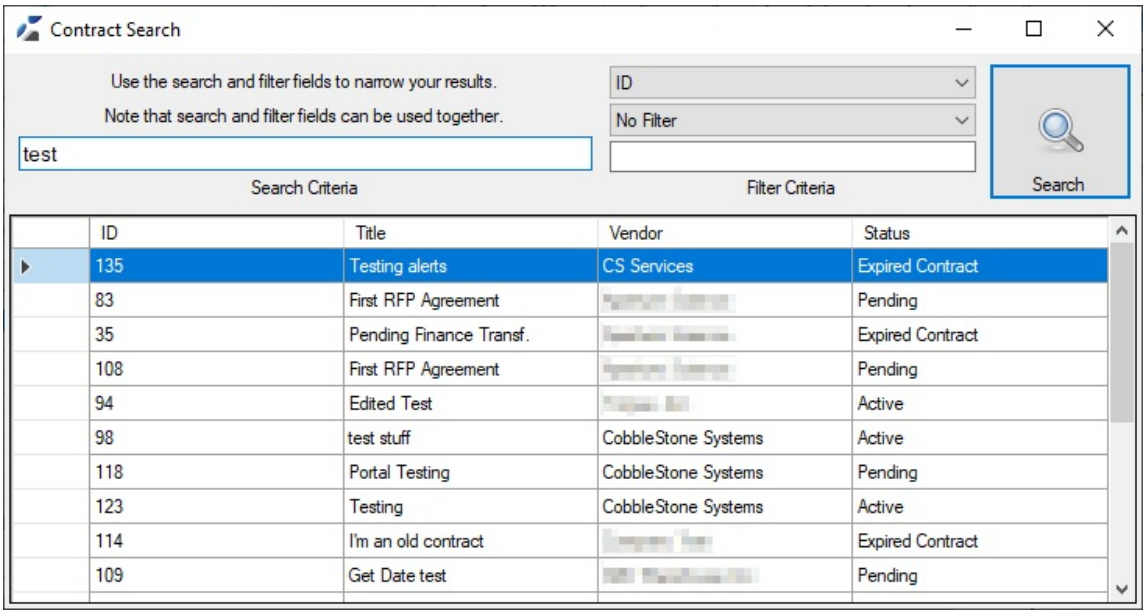
- File upload and download tool. Can be used independently or with our Microsoft Word and Outlook plugins.
- Drag/Drop operations for uploading and downloading documents
- Access to Clause Library
- Add and update records for the main areas (Contracts, Requests, Purchase Orders, E-Sourcing/Solicitations, Vendors and Employees)
- Search for existing records and associated files
- Task alerts
- Integration with Microsoft Word (Optional)
- Integration with Microsoft Outlook (Optional)

Requirements:

Contract Insight Version 17.6.0 or higher
Microsoft Windows OS
Windows Installer 3.1
.NET Framework 4.5.2
TLS 1.2 or higher enabled

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Microsoft Word Plugin

INSTALL NOW

CHECK REQUIREMENTS

Description:

- Upload a document to Contract Insight directly from Microsoft Word
- Find and copy clauses into documents
- Add and update records for the main areas (Contracts, Requests, Purchase Orders, E-Sourcing, Vendors and Employees)

Requirements:

CobbleStone PC Helper App or Enterprise File Utility

Contract Insight Version 17.6.0 or higher

Microsoft Windows OS

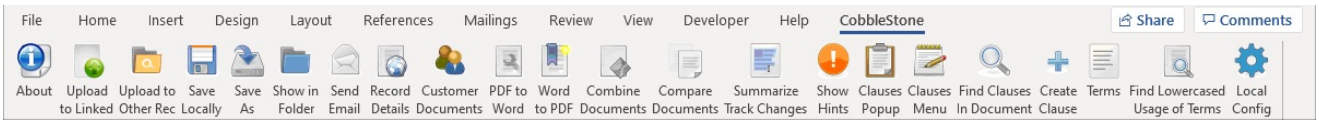
Microsoft Office 2010 or higher

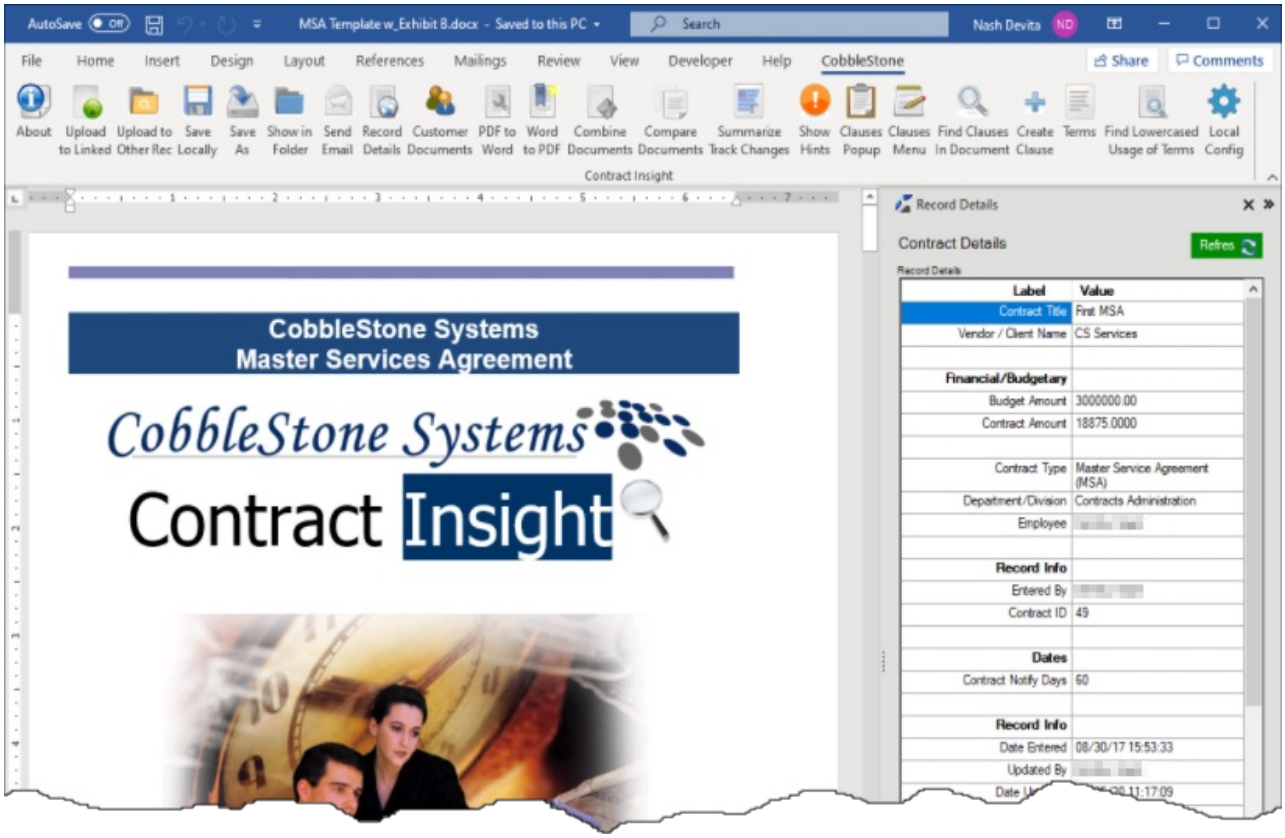
Windows Installer 3.1

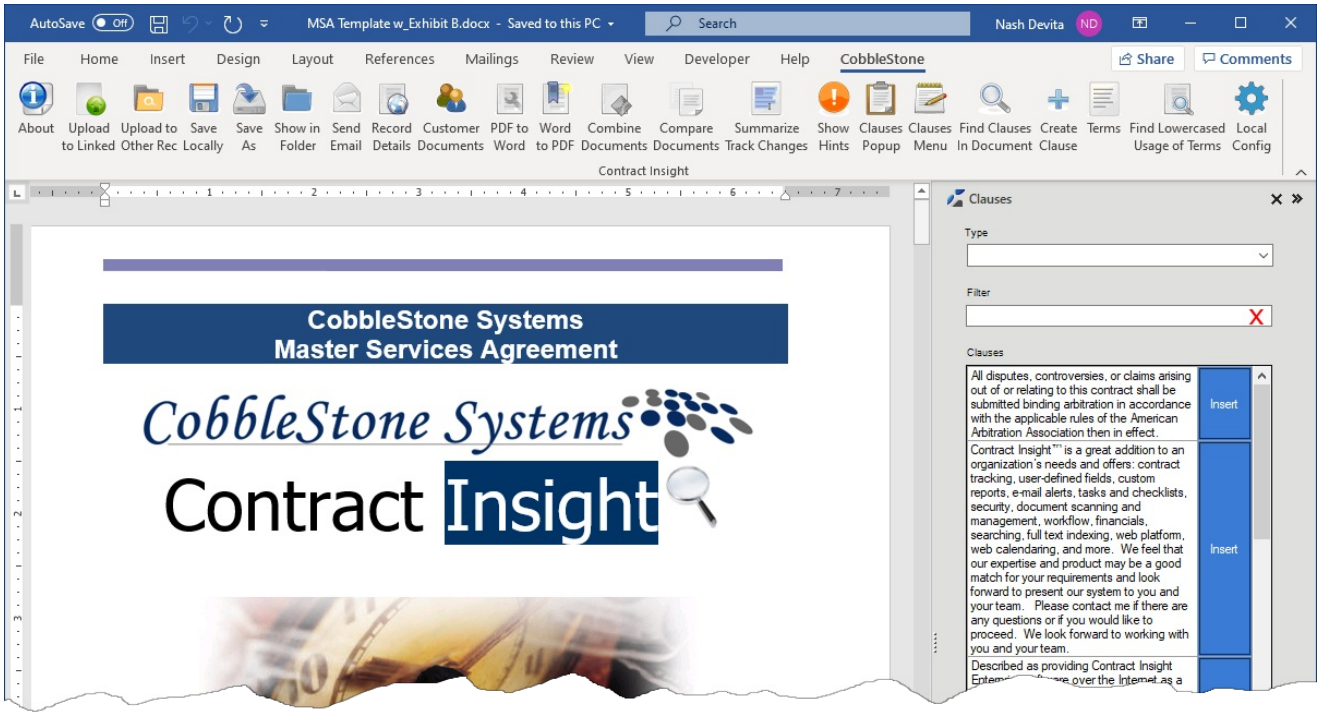
.NET Framework 4.5.2

TLS 1.2 or higher enabled

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Microsoft Outlook Plugin

INSTALL NOW

CHECK REQUIREMENTS

Description:

- Upload attachments to Contract Insight from Microsoft Outlook.
- Customizable ribbon buttons
- Add and update records for the main areas (Contracts, Requests, Purchase Orders, E-Sourcing, Vendors and Employees)

Requirements:

CobbleStone PC Helper App or Enterprise File Utility

Contract Insight Version 17.6.0 or higher

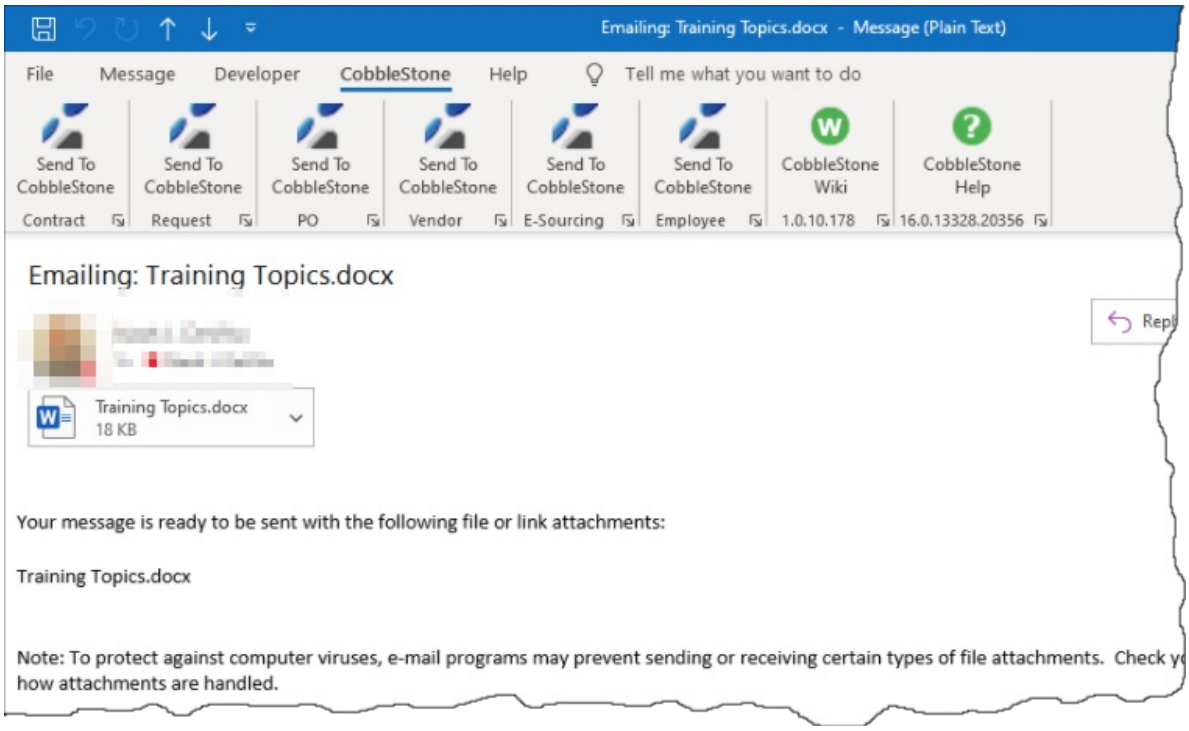
Microsoft Windows OS

Microsoft Outlook 2013 or higher

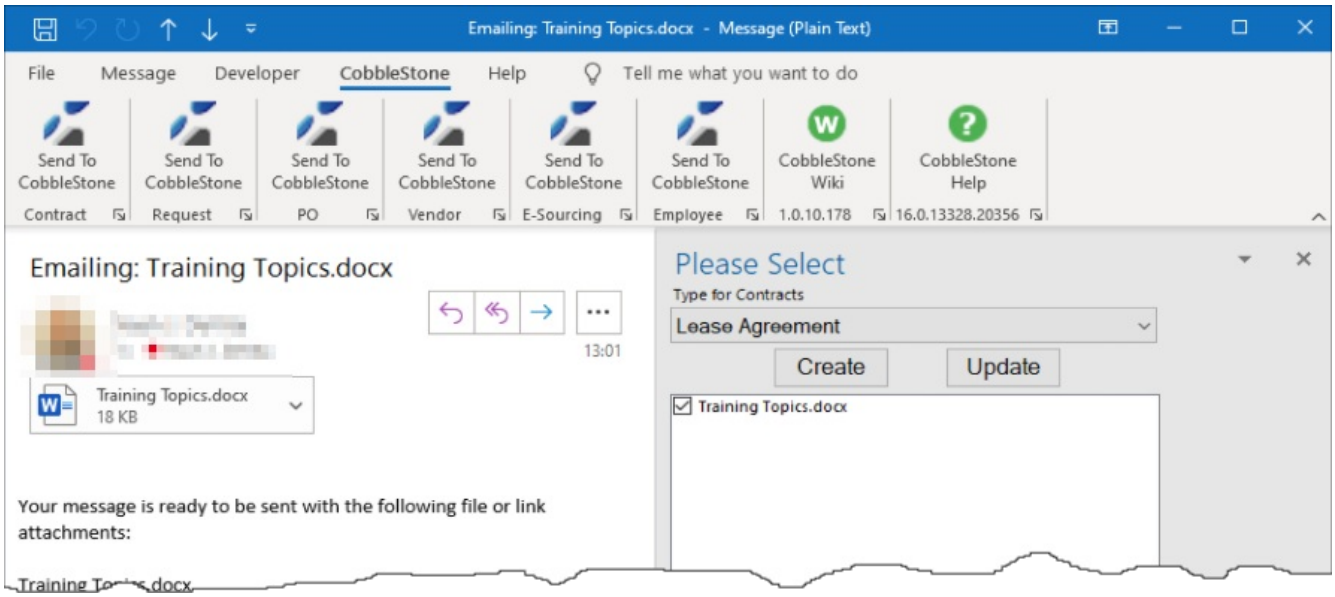
Windows Installer 3.1

.NET Framework 4.5.2

TLS 1.2 or higher enabled

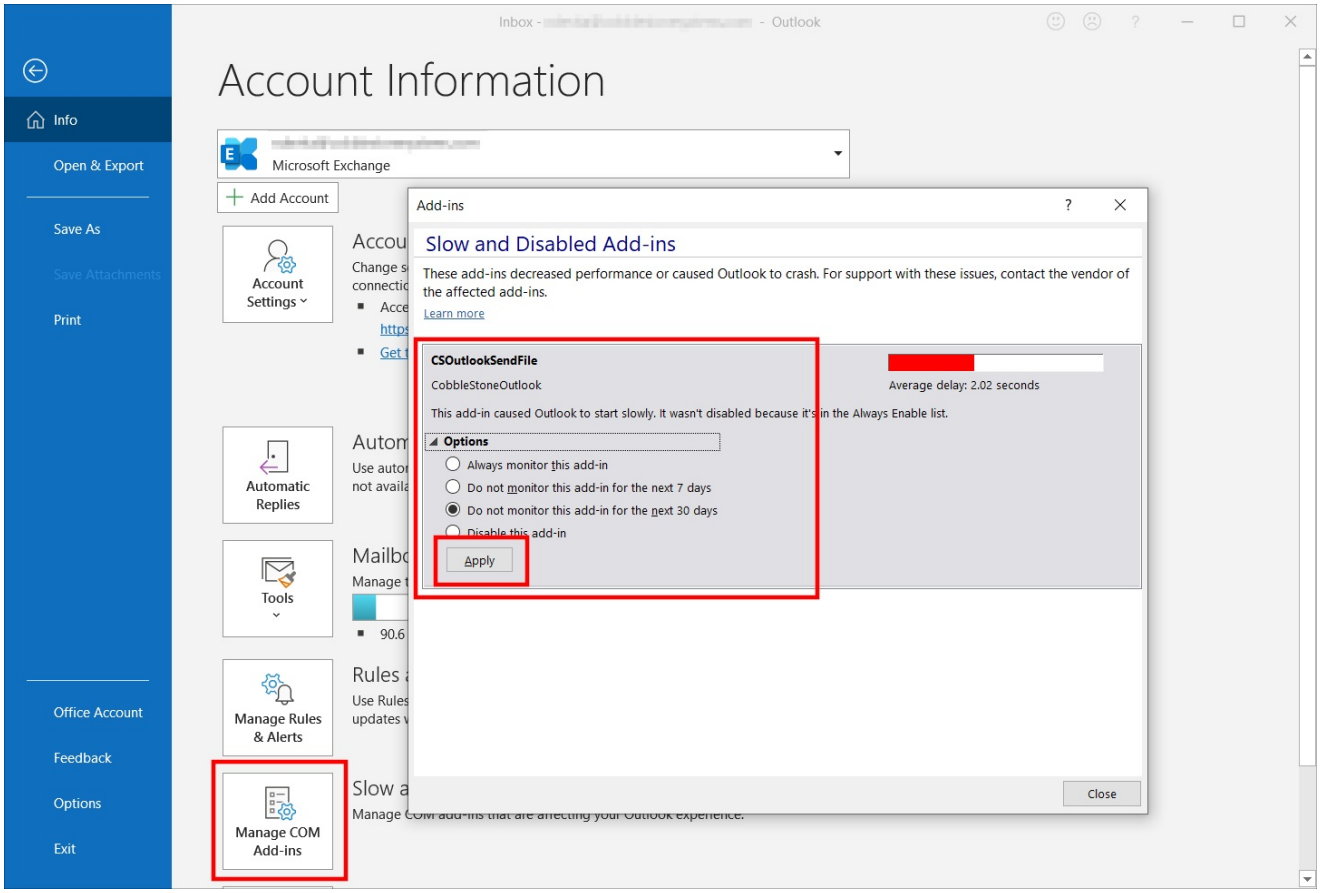


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Note: When installing the Outlook Toolbar Plug-In, close Outlook entirely and install the latest version of the Toolbar by navigating to CobbleStone via the top navigation menu's **Help** item and select **Helper Applications**. Download the appropriate file and run it.

If the Toolbar is not displaying as intended, Open Outlook, Open the **File** menu and click **Info**. Once the page displays, click **Manage COM Add-ins**. A pop-up window displays. Next, select the **CSOutlookSendFile** item and enable the plug-in. Finally, close and restart Outlook. The plug-in should be operating as intended.



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PDF OCR Utility

INSTALL NOW

CHECK REQUIREMENTS

Description:

CobbleStone Software's PDF OCR Utility provides our clients with an easy-to-use OCR tool. This tool will convert any image-based PDF file into a text-searchable PDF File. PDF Files that are text-searchable can be searchable within Contract Insight's Full Text Indexing/Searching.

Requirements:

Microsoft Windows OS

Windows Installer 3.1

.NET Framework 3.5 SP1

PDF E-Sign Utility

INSTALL NOW

CHECK REQUIREMENTS

Description:

CobbleStone Software's PDF E-Sign Utility provides our clients with an easy-to-use electronic signing of PDF Files. This tool will allow a user to select a PDF and "electronically sign" the file with either an image or by typing in their initials.

Requirements:

Microsoft Windows OS

Windows Installer 3.1

.NET Framework 3.5

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Web Plugin Install Instructions

Web Plugin Install Instructions

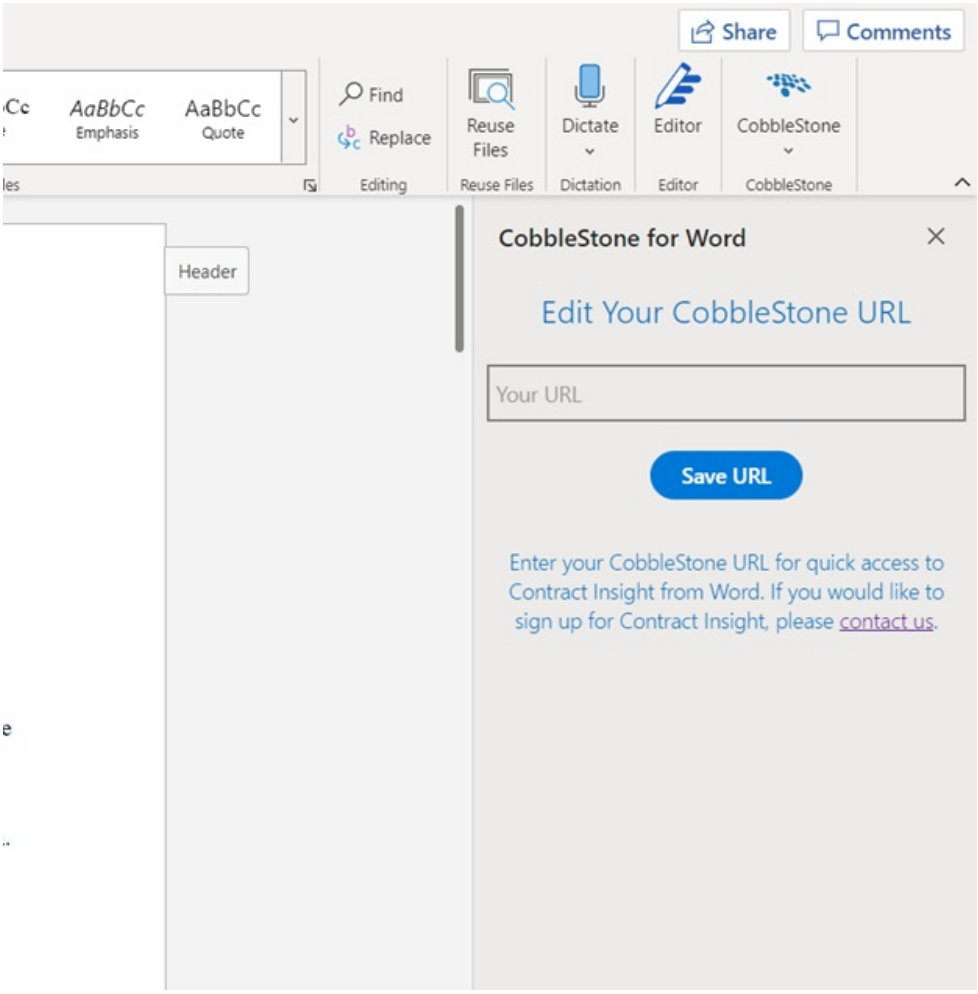
CobbleStone Software Web Plugin Installation Instructions

Word Web Plugin

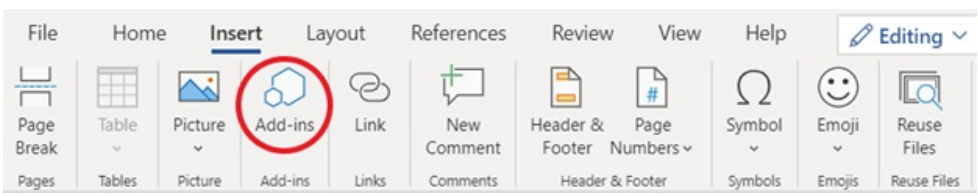
Manifest

Description:

Save and open CobbleStone URLs from Word 365.



Add the manifest above using the step below.



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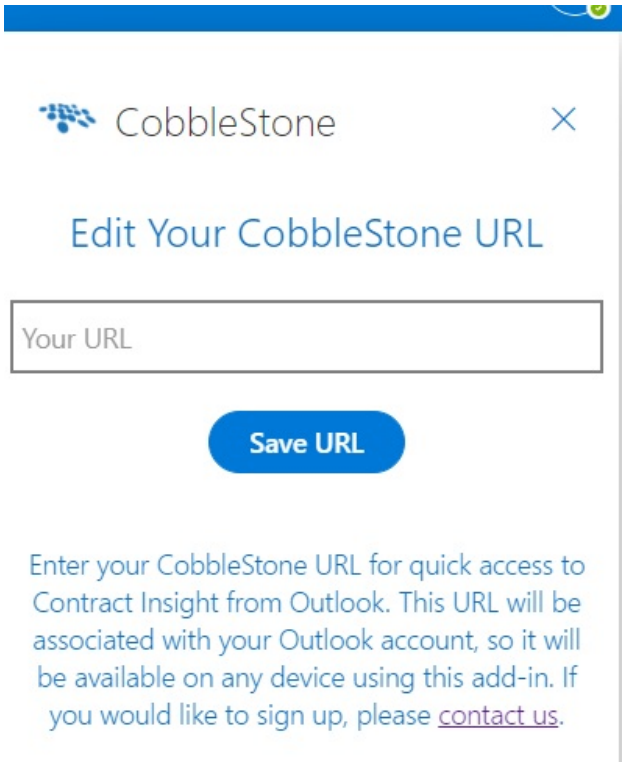


Outlook Web Plugin

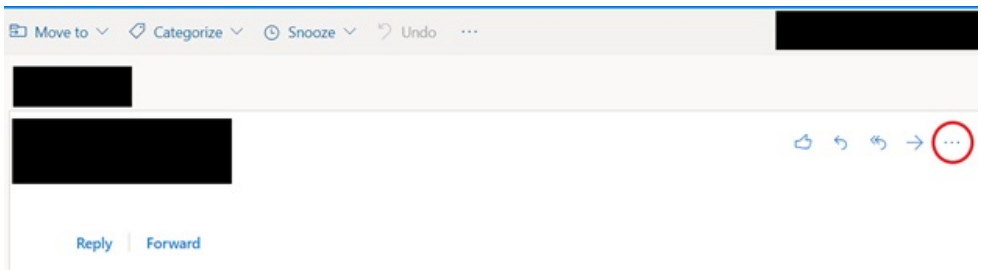
Manifest

Description:

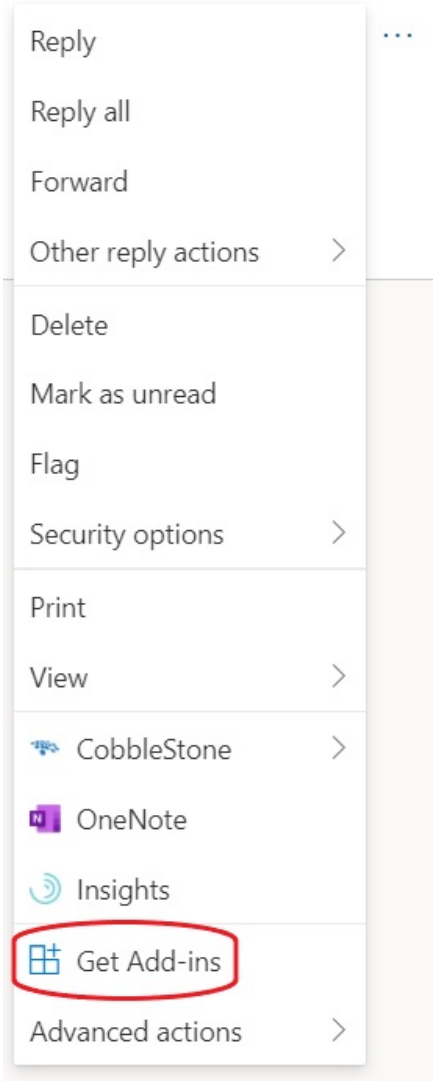
Save and open CobbleStone URLs from Outlook 365.

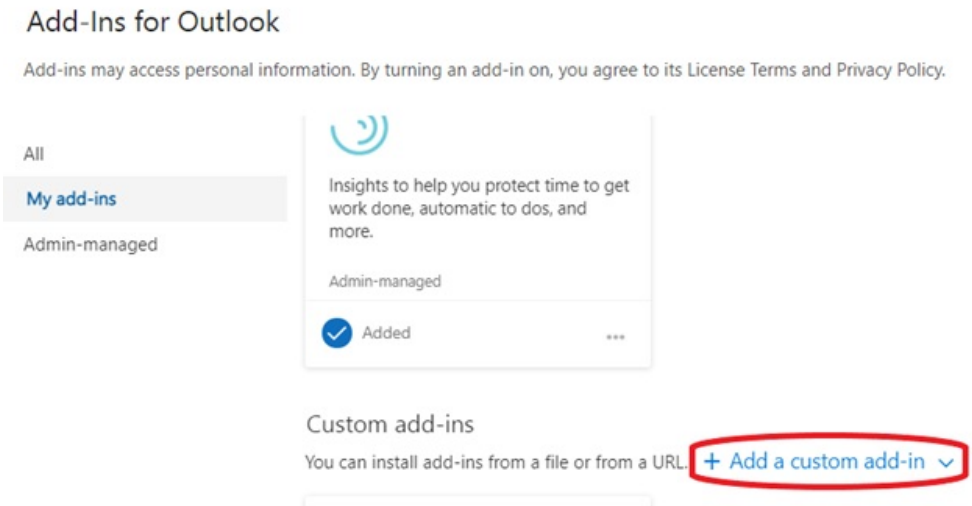


Add the manifest above through the step below.



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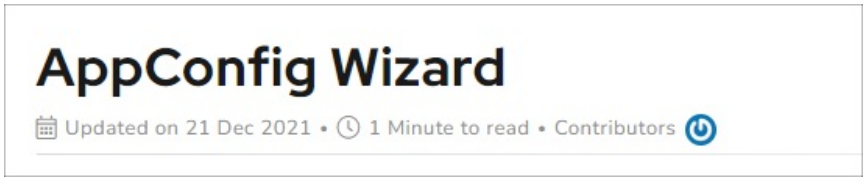
Wiki Page Layout

Layout of a Wiki Page

To add to it's ease of use, each and every wiki page is laid out in the same fashion. The components you find on one wiki page can be found in the same general location on any other wiki page. The following sections will go through a rundown of the components and their layout from the top down.

1. Wiki Page Overview Information:

The overview information for the wiki page you are currently viewing is located in the upper-middle of your screen, at the top of the page.



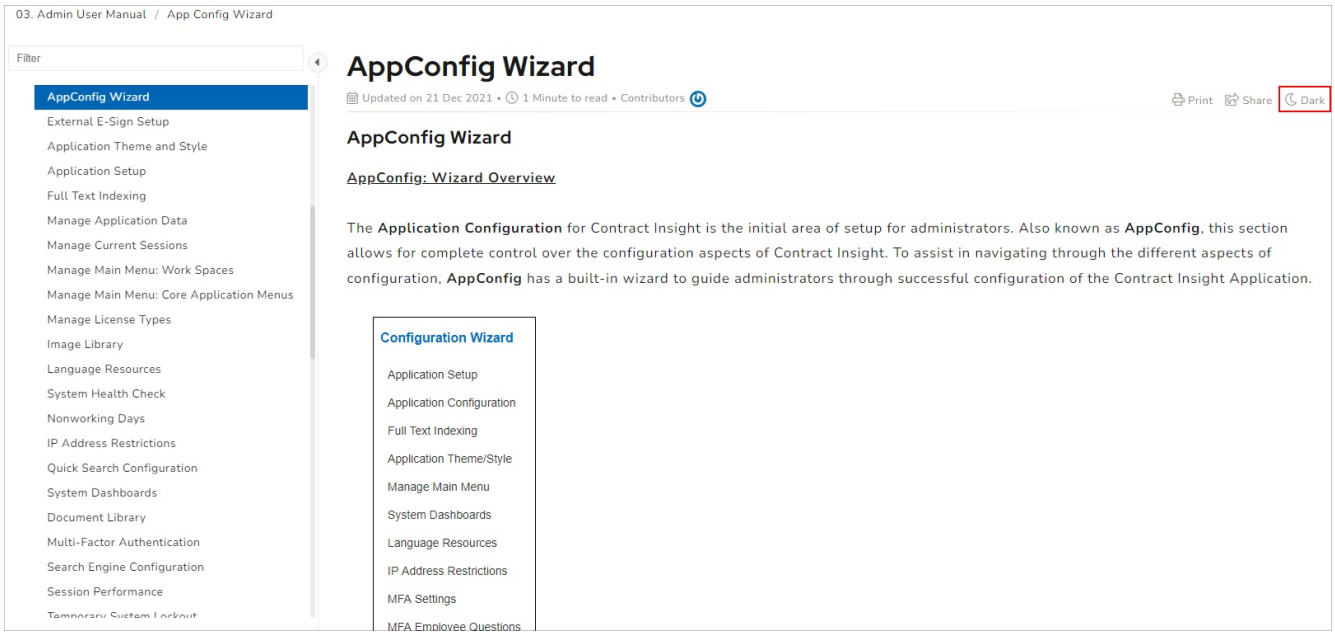
There are three parts to this overview information, each of which helps to provide high-level insight into the currently viewed wiki page.

a.	The top piece of information is the Title of the wiki page. This is also referred to as the page name.
b.	The bottom piece of information is the "last modified" detail, as well as the time to read (estimated) and who contributed to the page's creation.

2. Print/Share/Brightness Buttons

All the way to the right of the screen in the same area as the wiki page title are three buttons which allow users to print the page's contents, share the page's contents, or toggle the page from light to dark and vice-versa. Shown below is an example of what "Light" mode looks like, vs. what "dark" mode looks like.

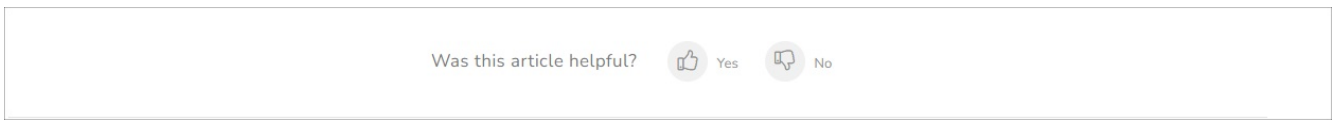
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3. Feedback Options

On the bottom of each page, there are feedback options in which users can give a thumbs-up if the page was helpful to generate any form of understanding about the topic in question, or a thumbs-down if not. We pride ourselves by celebrating any kind of victories with you through a quick thumbs-up, as well as recognizing areas of improvement with a thumbs-down.



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Navigating the Wiki

Basic Wiki Navigation

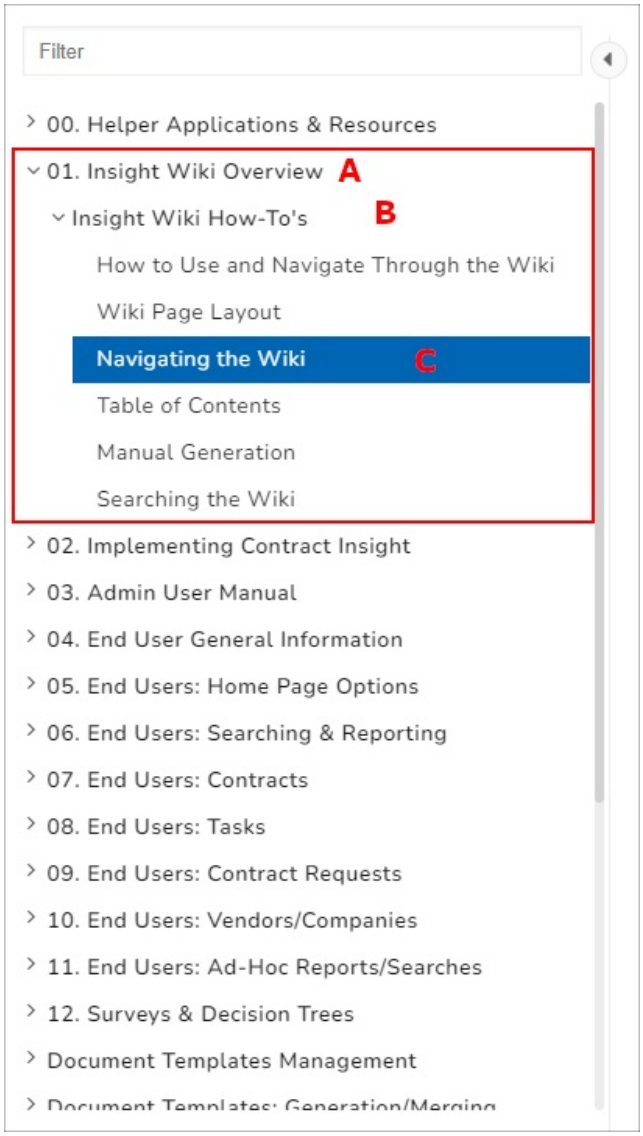
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Navigating the wiki has been simplified and consolidated into easy to use areas. Navigating between pages can easily be accomplished via the side menu, where pages may be quickly accessed, or through the search bar up top, where users may enter a search term and be brought to that page with a simple click of a mouse.

Below is detailed information on the utilization of each of these navigation types.

1. The Side Menu

The side menu is where every section will reside, able to be collapsed/expanded as desired. Every section is broken down into 3 areas, referred to for example purposes as book, chapter, and page.



Below is a breakdown of these areas:

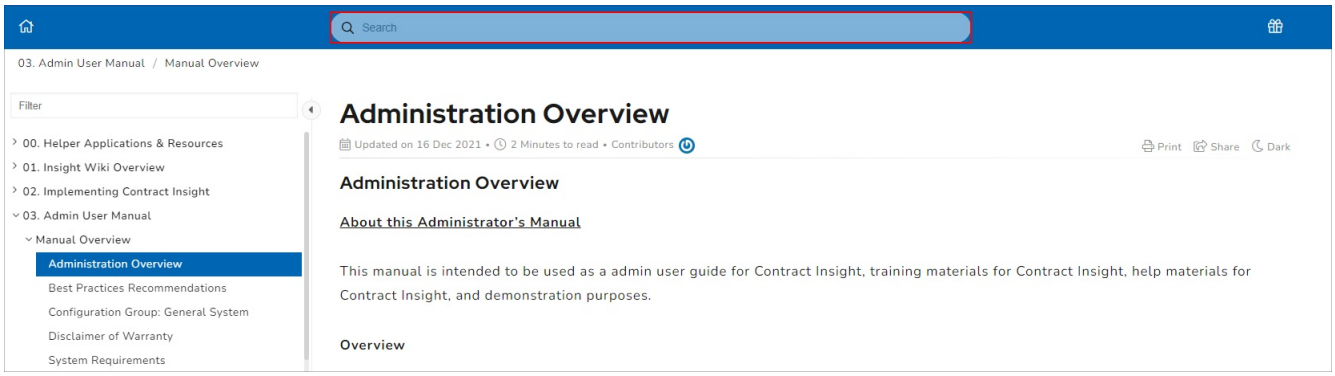
A. Book	This is the "book" of the wiki because it is the most broad. Each topic is broken down into books, and further expanded upon from there.
B. Chapter	"Chapters" are more specific. These are different areas within the book (the wiki topic).

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C. Page	"Pages" are where concrete information is held. Books hold Chapters within, and Chapters hold Pages within, but only pages will hold concrete information. Books and Chapters will be expanded upon to navigate to specific pages where users will find their desired pieces of information.

2. The Search Area

The search bar atop every page is an area where users can search for a specific search term. Results will appear in real-time, maximizing time and convenience across t

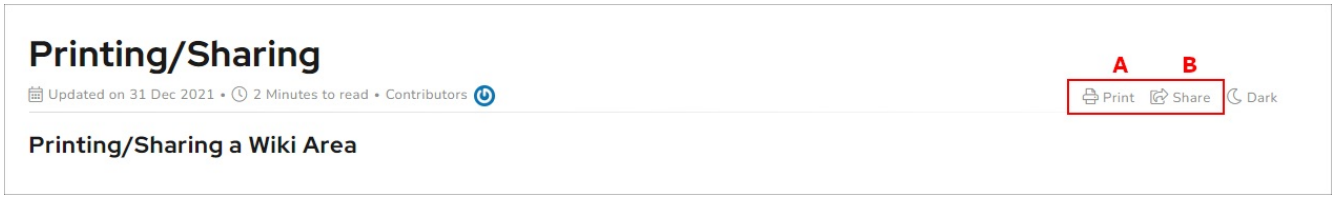


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Printing/Sharing

Printing/Sharing a Wiki Area

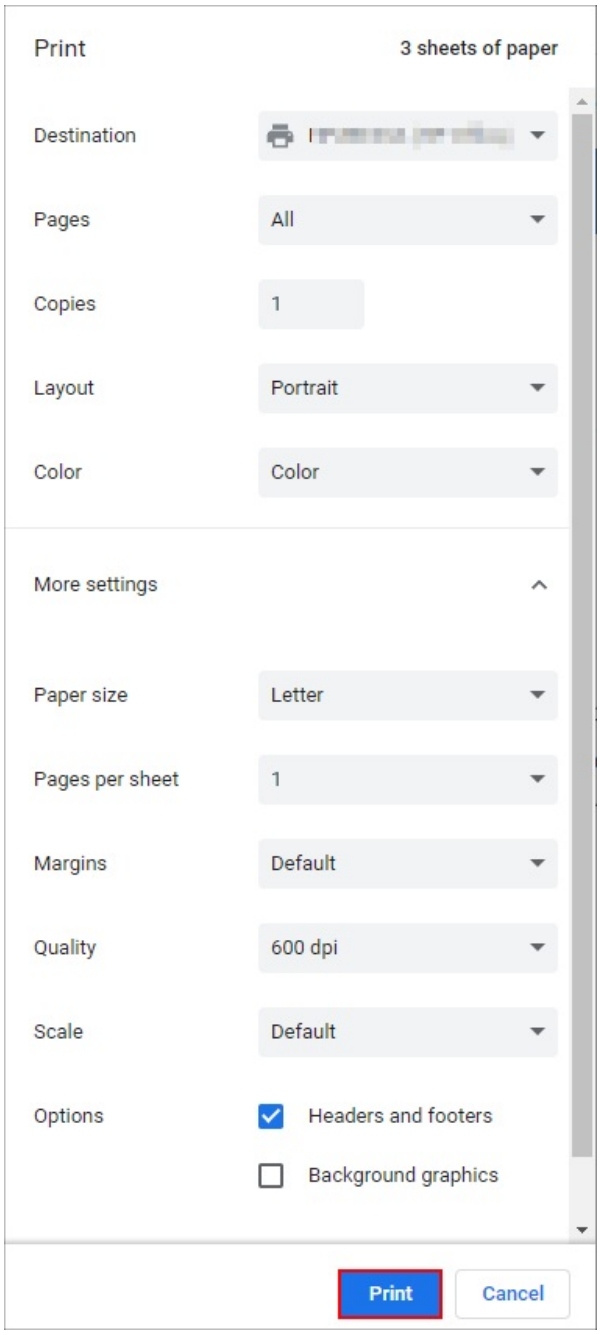
The Contract Insight Documentation wiki comes equipped with a quick way to quickly share and/or print a wiki page. With sharing, there are multiple different tools provided to the user, from sharing a post on a social media platform to sharing via email to equip somebody with the resources they need in order to complete a task.



A. Printing

To print a page, all the user needs to do is click Print. This will immediately open a print preview page, where things like destination (which printer will this page copy to), which pages should be copied, number of copies, layout style, color, and more may be toggled. When everything is to the exact specifications desired, click **Print** to initiate the print.

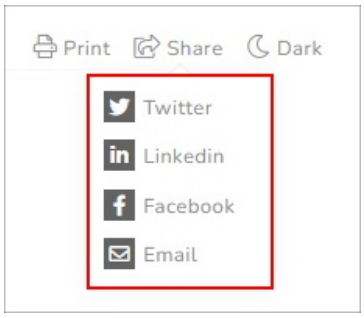
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B. Sharing

Upon sharing a wiki page, the user has many options available to them. They may share a page via Twitter, LinkedIn, Facebook, and/or email. Regarding sharing through email, this will prompt the user to enter in credentials if not having done so already. Once complete, the page's title will be used as the subject and the body text will be a URL link of the page being shared.

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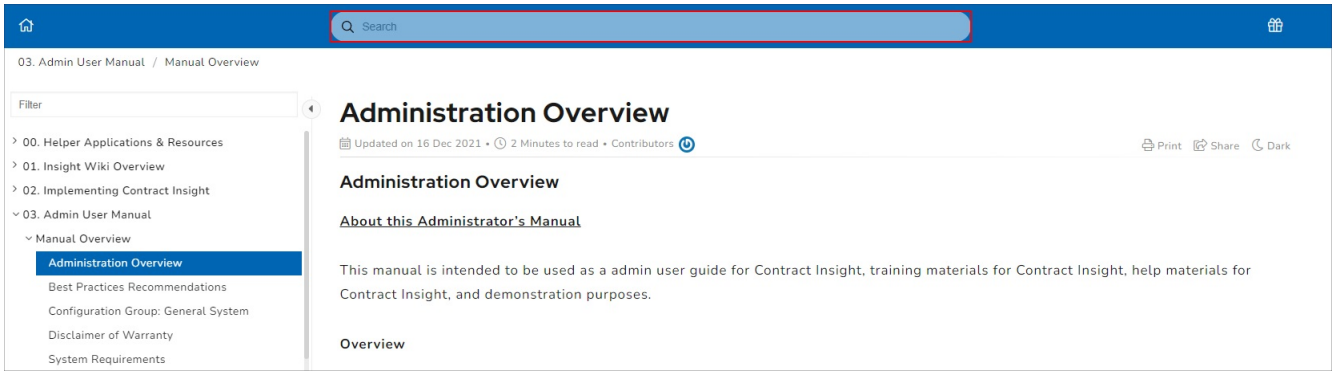
Searching the Wiki

Wiki Searching

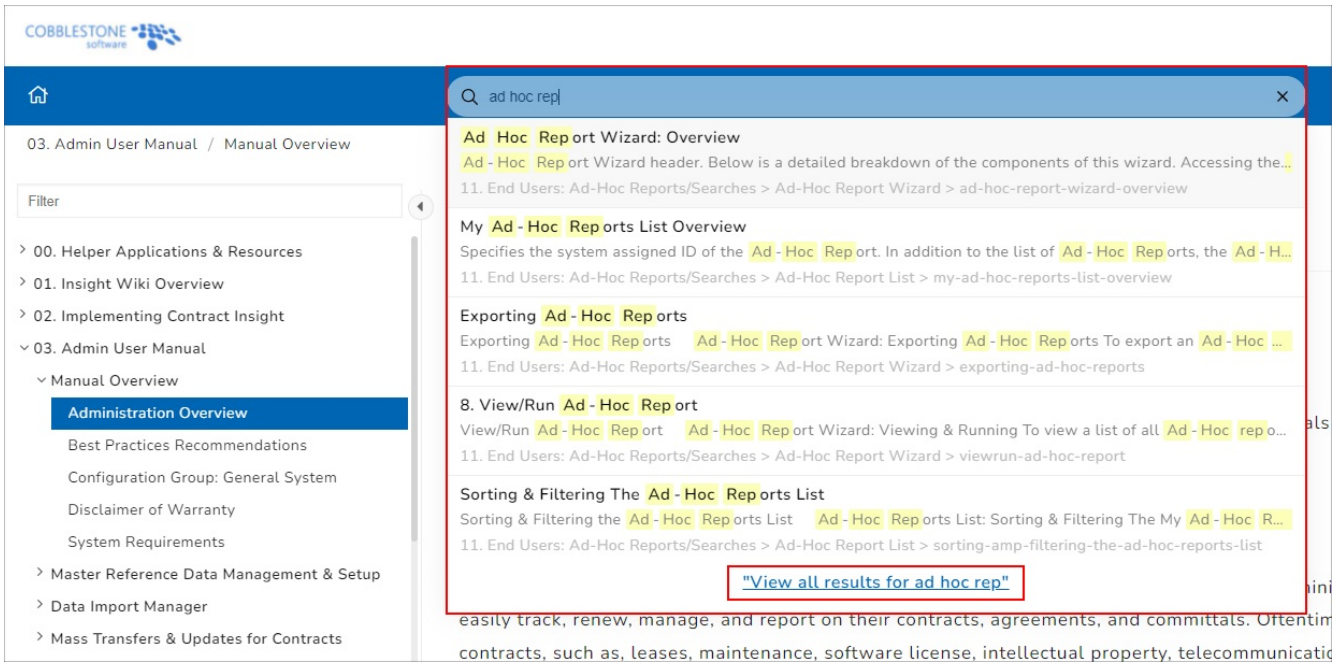
The searching capabilities within the wiki all for a quick and easy way to find any content within any of the wiki pages. Searching the wiki can be accessed by the top menu and/or quick navigation dock on the left hand side of the page. Once on the page, you will be presented with several different selection criteria before performing your search.

1. How to Use the Search Bar (Real-Time Results)

Near the top of the screen, users will see a search bar. This is where users of the Wiki may look for a search term. The Wiki will provide real-time search results where that string of characters is found throughout all sections of the Wiki.

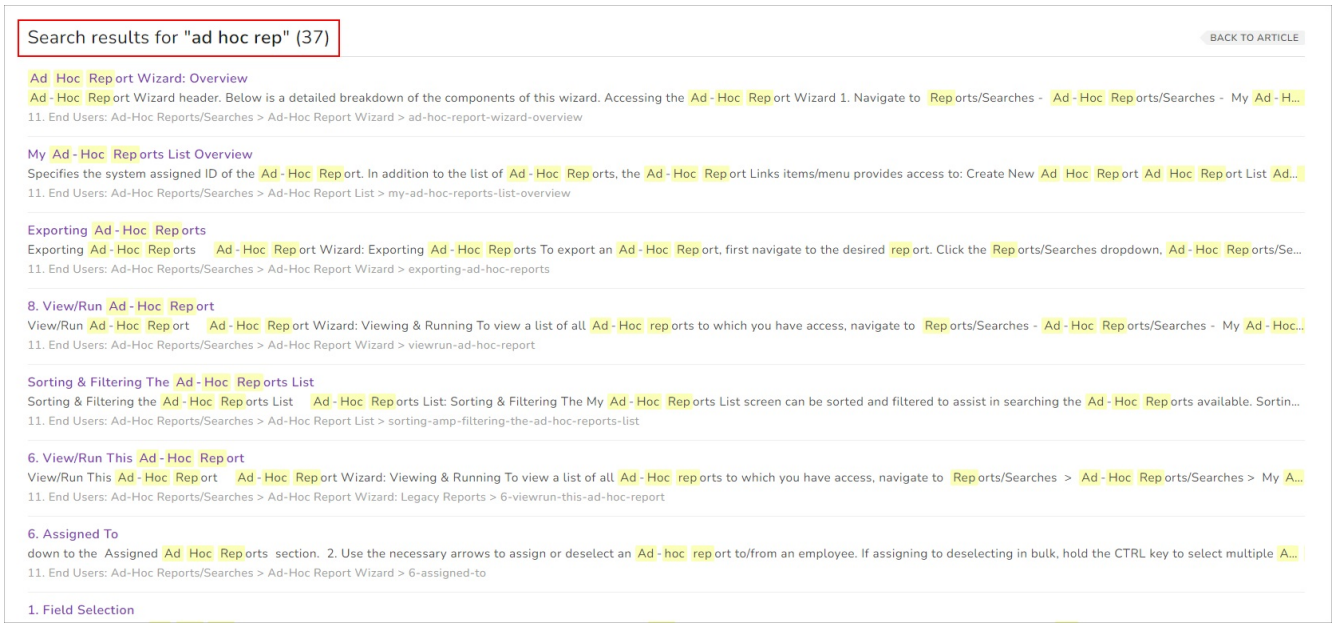


As shown below, when looking for a search term, results will appear live while typing. By clicking on an option, the system will direct to that specific page. If the desired page does not appear as a result, click **View all results for [search term]**.



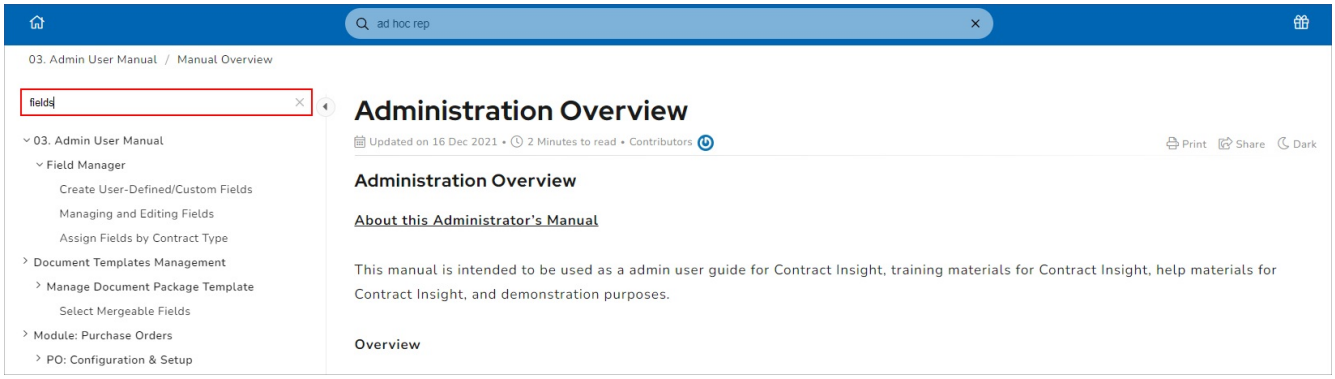
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Upon clicking **View all results for [search term]**, a screen will display showing every time the result is seen across all areas of the Wiki. The search term will appear highlighted in yellow, *whether in a title or in the body text of a section.* In this case, "ad hoc rep" was found 37 times throughout the Wiki.



2. Filtering

Above the collapsible/expandable menu where users navigate to find their desired page, there is an option to filter what should be displayed. This will look only for *titles* where this search term is found. By using "fields" as an example, only pages where "fields" is found will populate.



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Things to Consider

Things to Consider While Planning...

Things to Consider:

1. Think Globally, Act Locally

2. Focus and don't get too far ahead of yourself when planning the data that will populate the table you are currently working on- don't lose sight of the task at hand!

3. Follow the recommended order in which the tables should be planned/configured.

a. Departments & Divisions
b. Contract Types
c. Contract Categories
d. Contract Statuses
e. Locations
f. Occurrences/Term

4. Please be mindful of the fact that Contract Insight is created upon a Relational Database Platform (SQL Server). As such, the database has been designed as a set of relational tables which are related to each other in support of the application's purpose, objective and strategy. There is a strict hierarchy and sequence associated with entering data into the application's database and related tables.

5. After the Initial Application Setup Tables have been planned successfully, the next step is to plan what initial fields may need to be added in addition to the "out-of-the-box" fields in order to capture any additional information/data for the following tables:

a. Employees/Users
b. Vendors/Companies
c. Contract Details Table

6. Once any/all additional fields that need to be added have been identified, the next step is to populate the Employee/User spreadsheet and the Vendor/Customer spreadsheet.

Once all planning has been completed and confirmed, you will then be ready to start configuring/entering the values into your Contract Insight application.

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Initial Setup Data Planning Templates

Initial Setup Data Planning Templates

In order to successfully plan the values that will eventually be entered into your Contract Insight application, it is highly recommended to use Planning Spreadsheets in order to properly lay out the data.

Attached below are three spreadsheets:

1. **InitialSetupTablePlanningSpreadsheets.xlsx-** (Spreadsheet to be Filled Out)

Each tab represents an area considered to be part of the "MasterReference Data", or setup data that will provide the building blocks for your Contract Insight application. This spreadsheet will be used to compile a list of your own "Master Reference Data" as needed/fits for your organization and will be used to finalize the values for each table/tab that your organization would like to have included in the initial application system configuration.

2. **Out-of-the-Box FieldsforEmployees_Vendors_Contracts.xlsx-** (Out of the Box Fields)

For each tab in this spreadsheet, there is a list of the "out-of-the-box" Fields, the Field Type (Drop down, multi-select list box, text, etc.), and the value(s) that the field will either display (for drop downs) or be looking for (i.e. Budget Amount is looking for "Currency").

*If you would like to add an additional "user-defined" field to any of the spreadsheet tabs, please add it to the list for the appropriate table (Employee, Vendor/Company, Contract Record) and list

a) What you would like to have for the display name of the new field
b) The field type of the new field
c) List either the values that will need to be displayed in the "Values" cell for a Drop Down or Multi-Select List field type, or for other field types the length of the field (maximum number of characters that the field will accept)

3. **Out-of-the-Box SetupTableValues.xlsx-** (Out of the Box Values/Sample Data already in your Contract Insight Application)

This spreadsheet contains tabs that, like the "MasterReferenceDataTemplates.xlsx", represent the tables that are considered the building blocks for your Contract Insight application. These spreadsheet tabs, however, are populated with all of the "out-of-the-box" values that are provided with a new Contract Insight instance. Please let these values serve as samples of how the tables are used, and please feel free to keep or remove as many values as needed for your organization's final list in the "MasterReferenceDataTemplates.xlsx" spreadsheets.

See the wiki page for importing/updating for more on importing data into Contract Insight.

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Departments & Divisions

Departments & Divisions

Department & Division Planning for Your Contract Insight Application

The first table that should be thought about and planned should be the Departments & Divisions table. This table is usually used to document the structural breakdown of your organization. With a new installation of Contract Insight, there are several out-of-the-box values provided for you as examples of how this table is recommended to be used. Please keep in mind that while the examples may represent many of the same structural breakdown values that your organization may have, these values can always be edited and deleted if a change to the name of the Department/Division is needed, or if the Department/Division is not needed at all. Please see the Department/Division Management Wiki page for more information about adding, editing, and deleting values in the Departments/Divisions table.

Some Considerations:

1. Departments & Divisions are the ONLY table that can be used to control Employee/User Permissions.

Once all Departments/Divisions (as well as all other Initial Setup Tables) have been planned and implemented into your Contract Insight application, the next step will be planning your Employees that you would like to populate the Employee List in your application. Once you have planned all Employees that you would like to either a) have access to your organization's Contract Insight application (making them "Users" of the application) and/or b) be able to receive e-mail alerts from the Contract Insight application (including Contract Record Alerts, Task Alerts on a Contract Record, Ad-Hoc Report/Search Emails, etc.), you will then need to think about what permissions you would like to assign to the Employees who will be Users (allowed to access and login to Contract Insight) of the application. There are three methods of assigning Permissions to a User of the Contract Insight application:

1. "All" Permissions
2. "My Department" Permissions
3. "My" Permissions

Note: These permissions are further explained in the following Documentation Wiki pages:

- Assigning & Managing an Employee/User's Permissions
- Security Groups

The "My Department" Permissions work as follows:

1. System Administrators can assign an Employee/User to a primary Department as well as additional Departments/Divisions (from the Departments that have been populated in the Department/Division list).
2. On any Contract Record in your Contract Insight application, a primary Department should be selected, and any additional Departments/Divisions that need to manage/access the Contract Record can then be additionally assigned for that individual Contract Record.
3. When a User that has "My Department" permissions assigned to him or her, the User will only be able to perform the specified permission(s) against any Contract Record that has been assigned to at least one (1) of the same Departments that the User has been assigned to.

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2. Consider if you should include a "Restricted" or "Confidential" Department

Many organizations have Employees that will need to access all Contract Records because the Contract Record will always need to be managed/accessed by these Employees (i.e. Legal). However, in many cases, there are often Contract Records that even these Employees should not be allowed to see (i.e. Employment Agreements). By including a Department called "Restricted" or "Confidential", you can then assign these Employees to "My Department" permissions (NO "All" Permissions), and then assign these Employees to all Departments EXCEPT the "Restricted" or "Confidential" Department so that these Employees will essentially be able to see all of the Contract Records in the Contract Insight application EXCEPT the Confidential Contracts/Agreements that they should not see.

***NOTE: IF ANY "ALL" PERMISSIONS ARE ASSIGNED TO A USER WHEN USING THIS METHOD, THE USER WILL BE ALLOWED TO SEE THE CONFIDENTIAL/RESTRICTED CONTRACTS/AGREEMENTS THAT THEY SHOULD BE RESTRICTED FROM VIEWING.**

3. Departments/Divisions can be used in Workflow Criteria

4. Departments/Divisions can be used in Searching/Reporting Criteria (including filtering and sorting by Department/Division.

Next Steps:

1. Download and populate the 'Departments Planning' tab in the "InitialSetupTablePlanningSpreadsheets.xls" attached at the bottom of this screen.

2. Follow the instructions for implementing the finalized Departments/Divisions list either on an individual value-by-value basis on the "Department/Division Management" screen, or by using the instructions on the "Bulk Import Data" screen of the Documentation Wiki.

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Contract Types

Contract Types

Contract Types Planning for Your Contract Insight Application

The next table that should be though about and planned should be the Contract Types table. This table is usually used to document the different types of Contracts/Agreements that your organization may have with Vendors/Customers (the 'counter-party'). The Contract Type table in Contract Insight is hierarchical to other Initial Setup Tables, such as the "Categories" table, in that the Contract Type is always selected first when adding a Contract Record. With a new installation of Contract Insight, there are several out-of-the-box values provided for you as examples of how this table is usually used. Please keep in mind that while the examples may represent many of the same Contract Types that your organization uses, these values can always be edited and deleted if a change to the name of the Contract Type is needed, or if the Contract Type is not needed at all. Please see the Contract Type Management Documentation Wiki page for more information about adding, editing, and deleting values in the Contract Types table.

Some Considerations:

1. Contract Types are always the first classification to be selected when adding a new Contract Record to Contract Insight.

This is something that cannot ever be changed because of the areas that can be affected by the Contract Types table.

2. You can have as many or as few Contract Types as you would like documented in your Contract Type list in Contract Insight.

Always keep in mind that while a feature in Contract Insight may be available, it may not be something that fits into your organization's Contract process. You can document as many or as few Contract Types as needed by your organization. Remember that the reason for purchasing Contract Management Software was to make the process of managing your organization's contracts easier, not more complex.

3. Contract Types can have a unique set of fields assigned to its Contract Record screen (see below).

Areas Affected:

For each Contract Type value in your Contract Insight application, you can have a unique set of fields displayed on each Contract Record screen.

A feature available in Contract Insight is the "Assign/Manage Fields by Contract Type" feature. This allows Administrators to add Contract Type-specific fields to the master list of fields for the Contract Details Table, and then go in and assign only the fields that pertain to that Contract Type to the list of fields that will be displayed. Here is how it works:

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1. Go into the Field Manager > Manage Fields screen and create/add any additional necessary fields to the Contract Details Table, even if the additional field(s) only apply to one or all of the Contract Types.
2. Next, go to the Field Manager > Assign/Manage Fields by Contract Type screen and select a Contract Type from the drop down list (which will display all of the Contract Types that you have entered into your Contract Types list).
3. First be sure to add all of the fields listed in the "Tip" box in the right hand menu of the screen by clicking the "Add" link for the field.
4. Next, add any additional fields that you would like to have displayed on the Contract Type's Contract Details screen.

Please keep in mind that assigning fields by Contract Type is not something that HAS to be done/utilized, but is an optional feature that is available for your organization to use if needed.

Next Steps:

In the project plan provided by your implementation specialist or in the spreadsheet attached to this page, plan the types and fields required for your agreements.

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Contract Categories

Contract Categories

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Contract Categories Planning for Your Contract Insight Application

The Contract Category table is usually used to document a further breakdown or classification of the Contract Types. However, depending on the type of organization that you work for, you may want to consider using the Contract Categories table for holding large amounts of data/values rather than creating a user-defined field for these values. While the Contract Types table can affect the Basic Templates and Fields Assigned by Contract Type, the Contract Categories table is not going to affect any other aspect of your Contract Insight application. The Categories table can be used for searching, reporting, sorting and filtering, as well as for Workflow criteria specifications. Please keep in mind that while the Contract Categories table is not a mandatory table to be populated, it can be used in many different ways besides simply being a further classification of Contract Types.

With a new installation of Contract Insight, there are several out-of-the-box values provided for you as examples of how this table is usually used. Please keep in mind that while the examples may represent some of the Categories that your organization would like to use, these values can always be edited and deleted if a change to the name of the Category is needed, or if the Category value is not needed at all. Please see the Contract Category Management Documentation Wiki page for more information about adding, editing, and deleting values in the Contract Categories table. See below for some examples of how the Contract Categories table is often used by organizations in different industries.

Some Examples for Consideration:

1. Hospital/Healthcare Organizations

Many Hospital/Healthcare clients tend to use the Contract Categories table to hold their listing of General Ledger (GL) Codes. This allows your organization to document for each Contract Record the GL Code that is associated with that particular Contract.

2. Service/Product Providers

Many Service Providers tend to use the Contract Categories table to hold a list of all of the Products/Services that their organization provides. This allows your organization to document for each Contract Record the particular Service or Product that the Contract Record is for.

3. State/County/Government Clients

Many Government agencies tend to use the Contract Categories table to hold a list of all of their Commodities. This allows the agency to document the particular Commodity that the Contract Record would be classified for/into on the Contract Record itself.

4. General: Basic Templates NOT being used

If you find that your organization will not need to use the Contract Types Basic Templates feature of Contract Insight and will not need to assign unique Contract Type-specific fields to each Contract Type, then an option would be to list a higher level of Contract Types (i.e. License Agreement, Lease Agreement, etc.) into the Contract Types table, and then list the further classifications in the Contract Categories table, such as your "Software", "Property", "Equipment", etc.

Next Steps:

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1. Download and populate the 'Contract Categories Planning' tab in the "InitialSetupTablePlanningSpreadsheets.xlsx" attached at the bottom of this screen.

2. Follow the instructions for implementing the finalized Contract Categories list either on an individual value-by-value basis on the "Contract Category Management" screen, or by using the instructions on the "Bulk Import Data" screen of the Documentation Wiki.

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Contract Statuses

Contract Statuses

Contract Status Planning for Your Contract Insight Application

The Contract Status table is usually used to document the stages of the contract life-cycle that your organization's contracts normally go through. With a new installation of Contract Insight, there are several out-of-the-box values provided for you as examples of how this table is recommended to be used. Please keep in mind that while the examples may represent many of the same status values that your organization may have and use, these values can always be edited and deleted if a change to the name of the Record Status is needed, or if the Status is not needed at all. Please see the Record Status Management Wiki page for more information about adding, editing, and deleting values in the Contract Status table.

Some Considerations:

1. Contract Statuses are normally used to document the stage of the Contract Life-Cycle that the Contract Record is currently in.

First, consider your organization's usual process for a contract from beginning to end. Next, determine whether any of those stages in the process can be combined. For example, if you have several stages that read something like "Send to Vendor for Review", "Receive back from Vendor", "Make Contract Modifications", "Send Back to Vendor", etc., then you should consider possibly pairing down some of the stages into "Contract Modifications", "Vendor Review", and/or "In Negotiation".

Always review your list of Statuses and think, "Is my team going to be able to manage this list?". Meaning, is the list of statuses that you have prepared realistic? Or is a member of your team going to need to log-in to Contract Insight every day in order to update the status of the Contract Record? Remember that the reason for having a Contract Management System is to make your Contract Management process easier and more manageable, not harder and more complex.

2. Contract Statuses can control whether Contract Record Alerts are sent out.

For each Status value that is listed in the Contract Status Table, you can specify whether you would like to allow e-mails to be sent out for that Contract Record if the Contract Record is set to that particular status. Contract Record Alerts that are automatically sent out may not be needed for some Contract Records (i.e. Evergreen Contracts), so you can have a Status that is called "Active- Non Alerting" with an "Allow E-mail" value of "No" or "False" so that the regular system generated alerts for a Contract Record will not be sent out for any contracts that are set to this Status.

Next Steps:

1. Download and populate the 'Contract Statuses Planning' tab in the "InitialSetupTablePlanningSpreadsheets.xlsx" attached at the bottom of this screen.

2. Follow the instructions for implementing the finalized Contract Statuses list either on an individual value-by-value basis on the "Record Status Management" Documentation Wiki screen, or by using the instructions on the "Bulk Import Data" screen of the Documentation Wiki.

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Locations

Locations

Locations Planning for Your Contract Insight Application

The Locations table is usually used to document the individual Locations/Entities of your organization, or even the actual physical Location of where the actual Contract is being stored/managed. However, if your organization does not have several entities or physical locations, then this table can be used to even document something like the Region that the Contract Record is for. While a table like the Contract Types table can affect the Basic Templates and Fields Assigned by Contract Type, the Locations table is not going to affect any other aspect of your Contract Insight application. While the Locations table is not a mandatory table that needs to be populated, this table can be used for searching, reporting, sorting and filtering, as well as for Workflow criteria specifications.

Please see the Locations Management Documentation Wiki page for more information about adding, editing, and deleting values in the Locations table.

Areas Affected:

*There are not any areas in Contract Insight that are affected by the Locations table.

Can Be Used For:

1. Searching
2. Reporting
3. Sorting & Filtering for Searches and Reports
4. Workflow Criteria

Next Steps:

1. Download and populate the 'Locations Planning' tab in the "InitialSetupTablePlanningSpreadsheets.xlsx" attached at the bottom of this screen.

2. Follow the instructions for implementing the finalized Locations list either on an individual value-by-value basis on the "Location Management" Documentation Wiki screen, or by using the instructions on the "Bulk Import Data" screen of the Documentation Wiki.

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Occurrences/Term

Occurrences/Term

Occurrence/Term Table Planning for Your Contract Insight Application

The Occurrences table is usually used to document the term of the Contract Record. Please keep in mind that this table is going to only be for informational purposes for the Contract Record, and will not affect the auto-renewing or auto-extending of a Contract Record's Expiration Date. While a table like the Contract Types table can affect the Basic Templates and Fields Assigned by Contract Type, the Occurrences table is not going to affect any other aspect of your Contract Insight application. While the Occurrences table is not a mandatory table that needs to be populated, this table can be used for searching, reporting, sorting and filtering, as well as for Workflow criteria specifications.

With a new installation of Contract Insight, there are several out-of-the-box values provided for you as examples of how this table is usually used. Please keep in mind that while the examples may represent some of the Occurrence/Term values that your organization would like to use, these values can always be edited and deleted if a change to the name of the Occurrence is needed, or if the Occurrence value is not needed at all. Please see the Contract Occurrence Management Documentation Wiki page for more information about adding, editing, and deleting values in the Contract Occurrence table.

Areas Affected:

*There are not any areas in Contract Insight that are affected by the Occurrences (Term) table.

Can Be Used For:

1. Searching
2. Reporting
3. Sorting & Filtering for Searches and Reports
4. Workflow Criteria

Next Steps:

1. Download and populate the 'Occurrences Planning' tab in the "InitialSetupTablePlanningSpreadsheets.xlsx" attached at the bottom of this screen.

2. Follow the instructions for implementing the finalized Occurrences list either on an individual value-by-value basis on the "Contract Occurrence Management" Documentation Wiki screen, or by using the instructions on the "Bulk Import Data" screen of the Documentation Wiki.

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Employees/Users

Employees/Users

Employee/User Planning for Your Contract Insight Application

Once all of the Initial Setup Tables have been successfully planned and populated in your organization's Contract Insight application, the next step would be to begin planning for your Employees/Users that should be entered into the application. Please see the License Types Overview Documentation Wiki page for more information about the topics in the "Things to Check & Confirm Prior to Planning" section.

Things to Check & Confirm Prior to Planning:

1. What License Types were purchased by my organization?

The first thing you should check before planning your Employees is what kinds of Licenses were purchased. On your Fully Executed Contract with CobbleStone Systems for Contract Insight, one of the first line items will let you know what was purchased. There are two types of Licenses:

- **Enhanced Licensing**

The Enhanced Licensing will list different levels of Licenses, such as "Admin", "Super", "Standard", and/or "Read Only". If there are License Levels listed on your Contract, then your organization has purchased the Enhanced Licensing model.

- **Legacy Licensing**

The Legacy Licensing will simply list the number of Licenses that have been purchased, with no License Levels listed.

2. Named or Concurrent Licenses?

The next thing that should be noted on the Fully Executed Contract with CobbleStone Systems for your Contract Insight application is whether the Licenses purchased are "Named" or "Concurrent".

- **Named**

If your organization has purchased Named Licenses, then this means that only 1 Employee can be set to "Active" (allowed to log-in) for each License purchased. This is a 1:1 match for Employees to Licenses purchased.

- **Concurrent**

If your organization has purchased Concurrent user licenses, then this means that you can have as many Employees set to "Active" (allowed to log-in) as you would like, but only the number of Licenses purchased can be logged in to the application at one time.

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Some Considerations:

1. Are there any additional fields that need to be added to the Employee Details screen to capture additional information about your organization's Employees?

First, you review the list of out-of-the-box fields provided in the attached "EmployeePlanningSpreadsheet.xlsx" document. Next, after reviewing the list of fields as well as what each field is used for and the type of data that the field accepts, you should then determine whether any additional fields are needed in order to capture additional data/information about the Employees, such as "Internal Employee Number" or "Retired/Separated".

If you determine that additional fields do need to be added, then you should plan them in the same spreadsheet as the out-of-the-box fields list. Once all additional fields have been planned, you should then follow the instruction on the Create User-Defined/Custom Fields Documentation Wiki page to add the new additional fields to the "Employee Details" table.

2. Which Employees should be users of your organization's Contract Insight application?

Once any/all additional fields have been added to the Employee Details screen, you should then begin to plan and determine which of your Employees should be allowed to log-in to Contract Insight. If an Employee is allowed to log-in to the application, then they are usually considered "users". In order to specify if an Employee is a User, you would need to specify this in the "ActiveYN" column of the attached "EmployeePlanningSpreadsheet.xlsx" document.

3. Which Employees of your organization's Contract Insight application should be assigned which License Level/Permissions?

For Enhanced Licensing, you would need to determine which Employee should be assigned to which License Level that was purchased.

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Vendors/Companies

Vendors/Companies

Employee/User Planning for Your Contract Insight Application

Once all of the Initial Setup Tables have been successfully planned and populated in your organization's Contract Insight application, the next step would be to begin planning for your Vendors/Customers that should be entered into the application.

Some Considerations:

1. Are there any additional fields that need to be added to the Vendor Details screen to capture additional information about your organization's counterparties?

First, review the list of out-of-the-box fields provided in the attached *EmployeePlanningSpreadsheet.xlsx* document. Next, after reviewing the list of fields as well as what each field is used for and the type of data that the field accepts, determine whether any additional fields are needed in order to capture additional data/information about the vendors, such as *Small, Woman-owned and Minority-owned Business* or *Insurance*.

If you determine that additional fields do need to be added, then you should plan them in the same spreadsheet as the out-of-the-box fields list. Once all additional fields have been planned, you should then follow the instruction on the Create User-Defined/Custom Fields Documentation Wiki page to add the new additional fields to the **Vendor Details** table.

2. Which Vendors/Customers should be users of your organization's Contract Insight application?

Once any/all additional fields have been added to the Vendor Details screen, begin to plan and determine which Vendors should be permitted to have contracts written against them. In order to specify if a Vendor is a active for new contracts, specify this in the **ActiveYN** column of the attached *EmployeePlanningSpreadsheet.xlsx* document.

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CobbleStone Systems Helper Applications

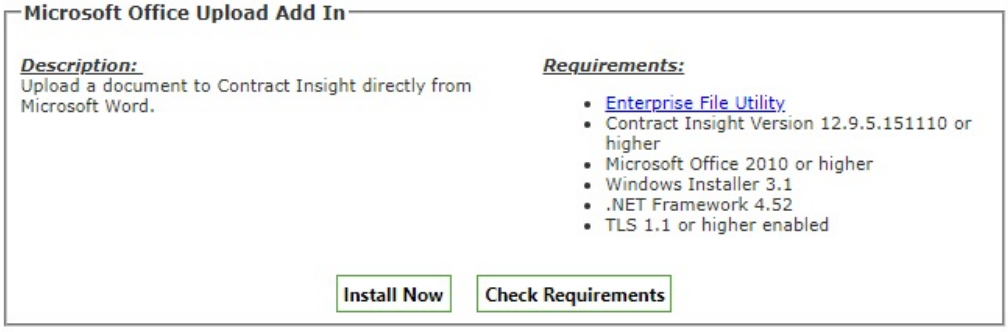
CobbleStone Systems Helper Applications

Cobblestone Contract Insight Enterprise File Utility – Helper PC Application



Set Up

To install the helper PC application, ensure your computer meets the requirements made available on the install page.



Next, select the Install Now button (seen above). Follow the installation wizard.

To start the File Utility and click OK to close the Welcome Screen and open the Sign In window.

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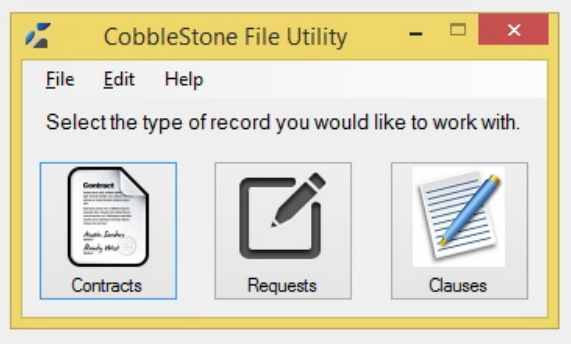


In the in the Contract Insight Login Web Address field enter the URL you use to access Contract Insight in your browser

In the User Name field enter your Contract Insight user name

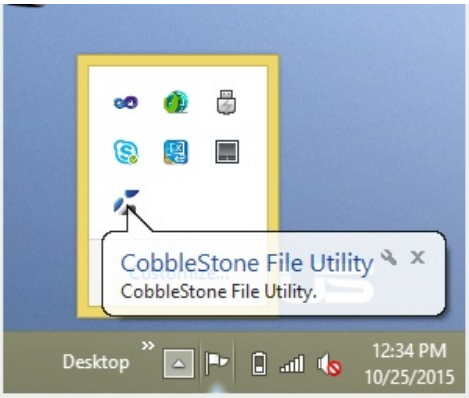
In the Password field enter your Contract Insight password

Main Window



The main window of the Contract Insight File Utility will launch in the upper right corner of your main monitor. From here you can select the type of record you would like to work with, view the help files or exit the application.

Minimizing the File Utility will place an icon in your task tray.



Record Types

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The Contract Insight File Utility currently supports two types of records.

•Contracts

•Requests

•Clauses

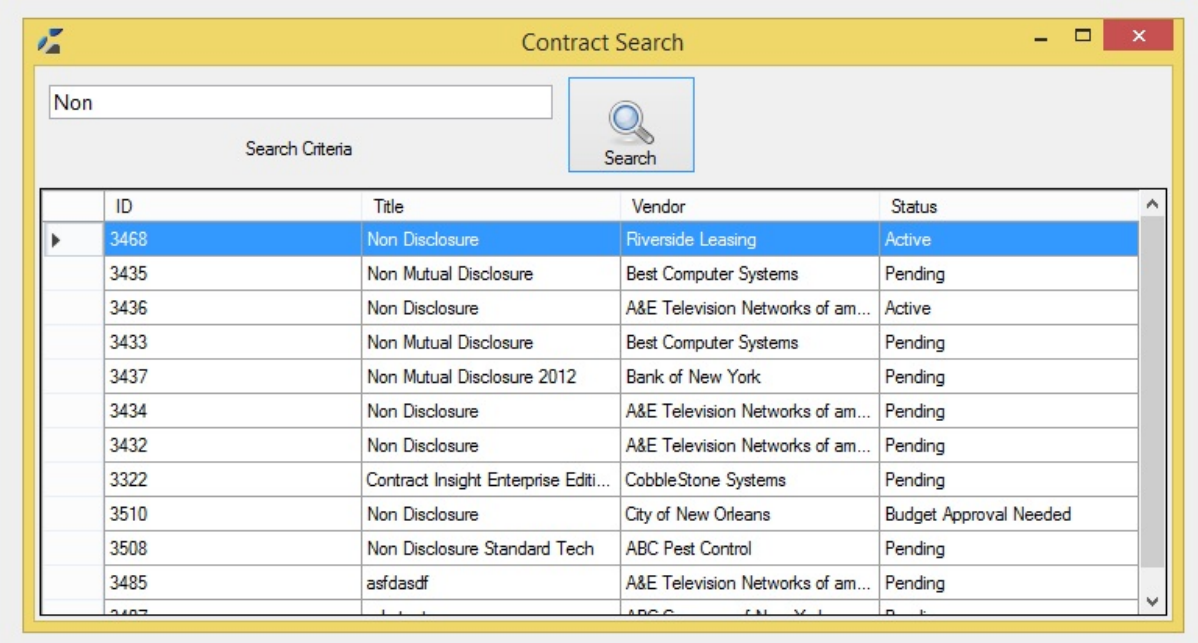
Contracts & Requests

The utility is designed to upload and download files to Contract or Request records. To work with either **Contract** or **Request** records, click the button corresponding to the type of record you would like to work with.

Clauses

The File Utility offers access to the **Clause library** stored in Contract Insight. You can use this option to find, copy and paste clauses from Contract Insight to documents on your computer.

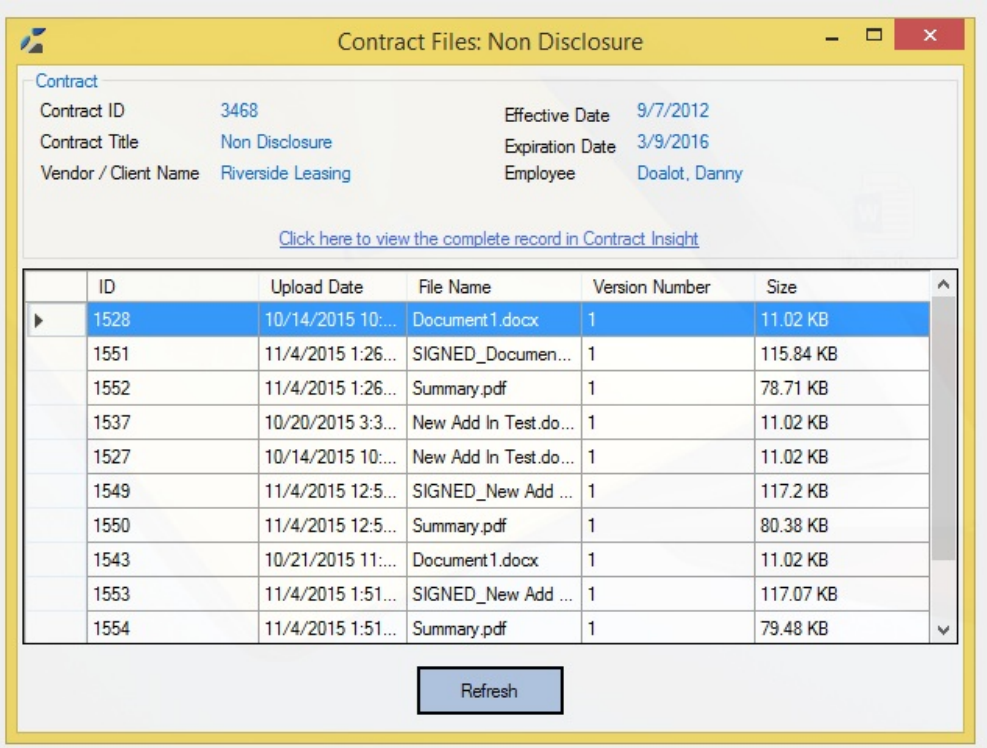
Search



To search for records, enter a search phrase and click the Search button. The search results are returned in a grid below the search criteria. To select a record to work with, double click on the row containing the desired result.

Contract Files

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The Contract Files window contains some basic information about the contract record and the list of files currently associated with the contract. From here you can upload, download or open a file from Contract Insight. There is also a link to view the full contract record in Contract Insight.

To **download** a file select a record and drag it to a location on your computer.

To **upload**, drag one or more files from your computer to the files grid area.

To **open** a file, double click on a record. This will download the record to your My Documents folder first and then open the downloaded file.

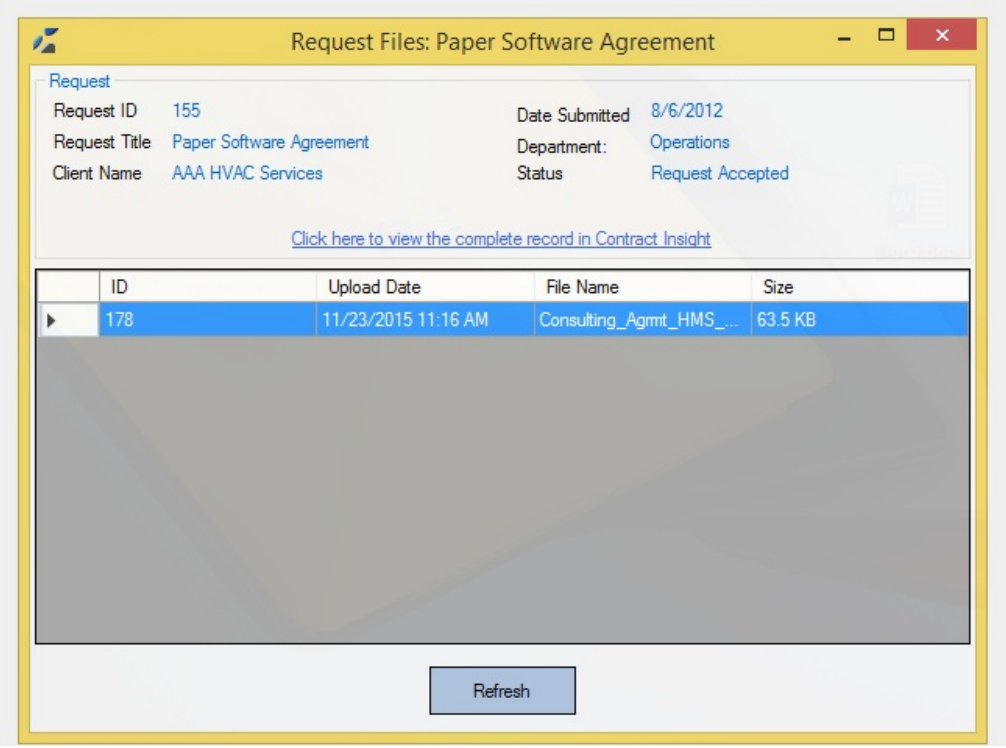
The file details in the grid may be sorted by clicking on the column headers. Columns may also be rearranged by dragging one column header to the left or right of another column header.

Versioning

Each upload through the file utility results in a new file being saved to the contract record. If a record exists for a file then the version number will be incremented for the new upload. The file upload utility will use the rule set in the File Type Extension Versioning property located under Setup > Configuration > (Configuration Group) Contracts to determine when to increment the version number.

Request Files

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The Request Files window contains some basic information about the request record and the list of files currently associated with the request. From here you can upload, download or open a file from Contract Insight. There is also a link to view the full request record in Contract Insight.

To **download** a file select a record and drag it to a location on your computer.

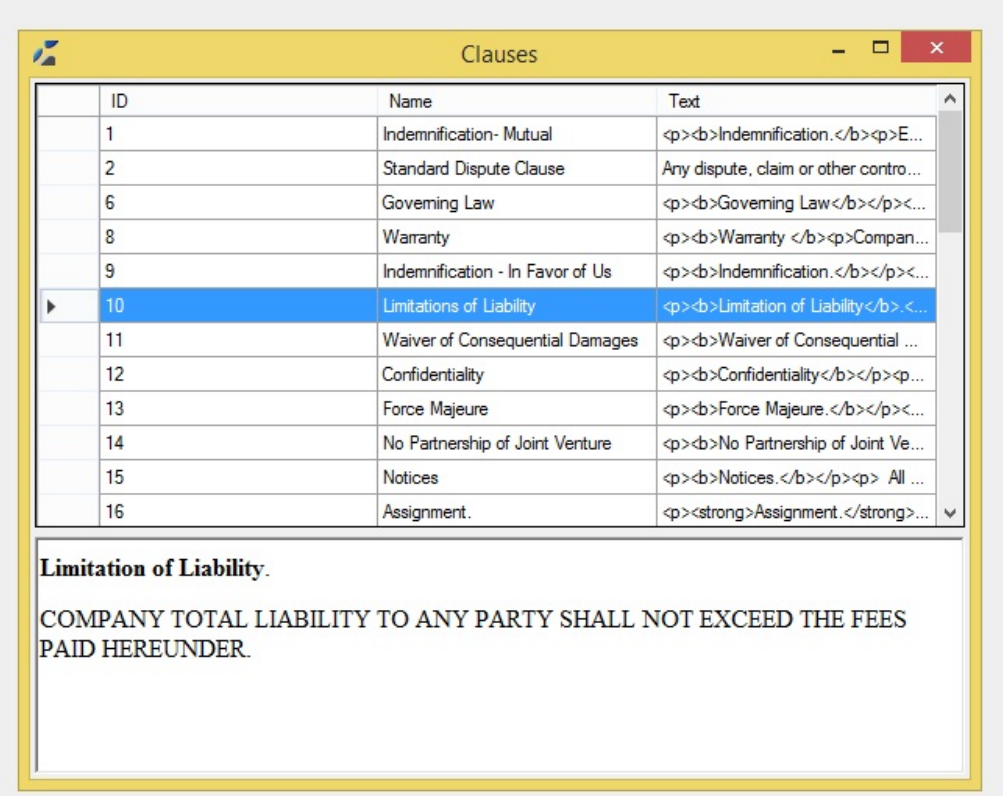
To **upload**, drag one or more files from your computer to the files grid area.

To **open** a file, double click on a record. This will download the record to your My Documents folder first and then open the downloaded file.

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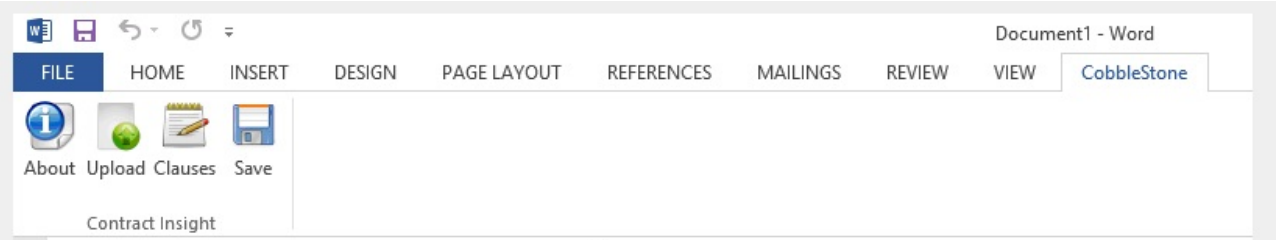
The file details in the grid may be sorted by clicking on the column headers. Columns may also be rearranged by dragging one column header to the left or right of another column header.

Clauses



Use the clause library to copy and paste clauses from Contract Insight into your documents.

MS Word Toolbar Addin



The optional MS Office add in adds an additional CobbleStone ribbon to Microsoft Word.

About — Contains information about the version of the Add In

•Upload — Used to upload the current document to Contract Insight

•Clauses — This option will load the Clauses window.

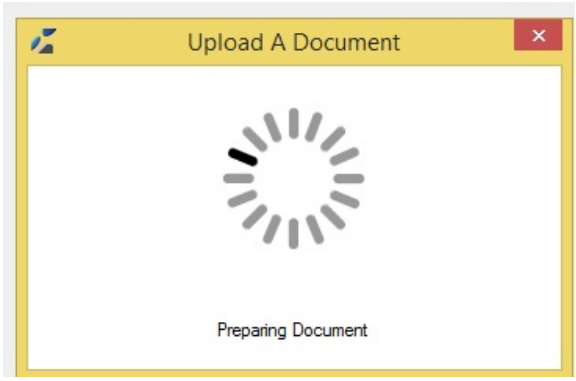
•Save — This is a convenience method for saving your document to your computer. It provides the same functionality as the Save option built in to MS Word

Uploading

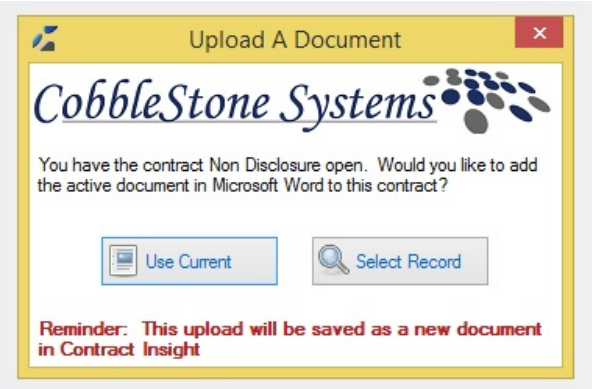
Each time the upload option is used from MS Word a new record is created. Users should exercise caution when uploading to avoid creating undesired versions of files in the Contract Insight database. It is recommended that the Upload option be used to save a final version of a document and that the Save option be used to store changes during editing.

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To upload a file to Contract Insight, click the Upload button to begin the process.

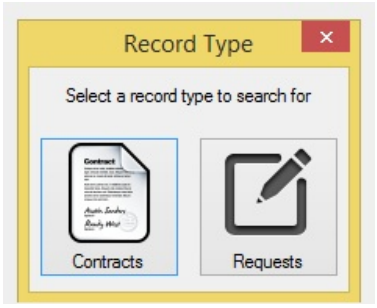


Once the document is ready for upload, you can select the destination. From the upload dialog select if you would like to use the current contract or request record (if any) or select a new record for the document.

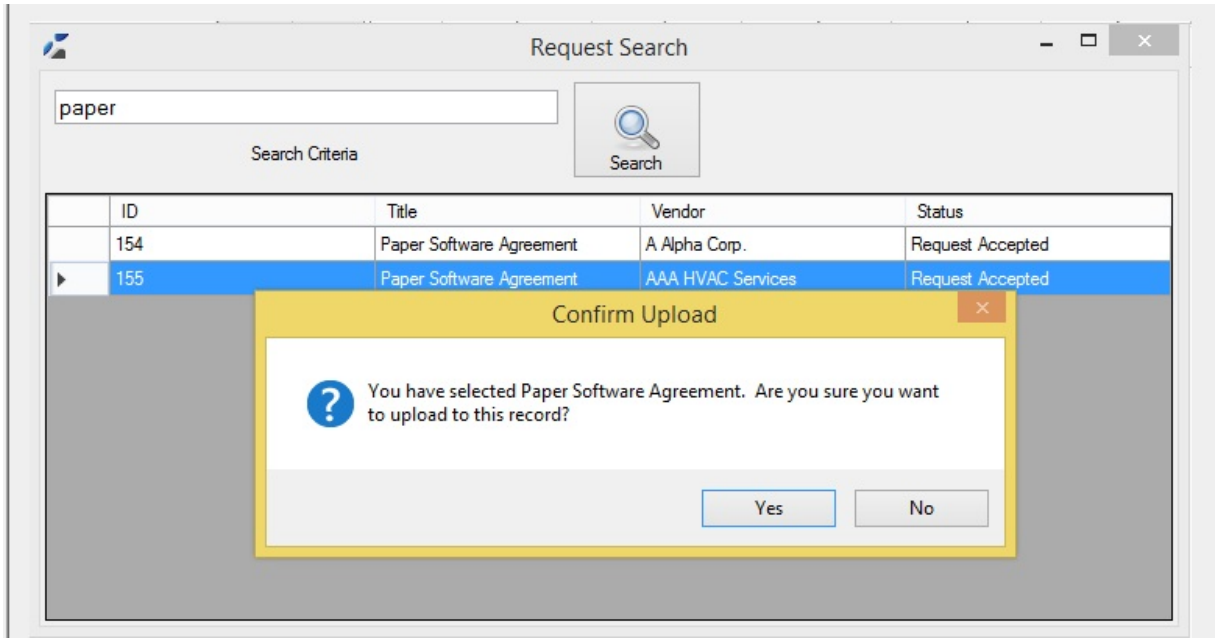


If you choose to select a record for the file you will be prompted to select a record type.

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Once a record type is selected you can search for a record to upload the file to. Double click on the desired record and confirm the upload to begin the upload process.



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Administration Overview

Administration Overview

About this Administrator's Manual

This manual is intended to be used as a admin user guide for Contract Insight, training materials for Contract Insight, help materials for Contract Insight, and demonstration purposes.

Overview

Contract Insight Enterprise, Contract Management Software offers contract professionals, administrators, and key personnel the ability to easily track, renew, manage, and report on their contracts, agreements, and committals. Oftentimes, organizations have to engage in many contracts, such as, leases, maintenance, software license, intellectual property, telecommunication services, sub-contractor contracts, and many other risk types. Over time it may be difficult to keep track of the renewals, risks, terms, review, and/or cancelation dates that make up each individual contract. Moreover, a loss of productivity and increased expenses may arise from an inefficient contract administration process. Contract administrators may find that they are overwhelmed with the number of contracts they must track, report on, renew and cancel. They may find that it is inefficient to use a standard filing system via filing cabinets, network folders, and spreadsheets. CobbleStone's Contract Management Software provides a simple solution to solve these problems.

CobbleStone Systems Contract Insight Contract Management Software provides an enterprise, web-based, solution to the contract management lifecycle process. It is installed on a network server and can be accessed by an Internet browser (Microsoft Internet Explorer, Firefox, etc.), and be used on a Local Area Network (LAN) and Wide Area Network (WAN) in a multi-user environment; and it can be hosted by CobbleStone and offered as a Software as a Service (SaaS).

Contract Insight is a highly robust and scalable contract management tool developed to industry standards, utilizing advanced web and database technologies. It is based on years of market research, industry experts, client input, and feedback from thousands of users. Contract Insight is an enterprise solution that offers unprecedented flexibility and functionality. It offers common functionality such as; multi-level security, the ability to track key dates of contracts, notes, track sub-tasks and milestones; it provides advanced notification, e-mail alerts, template based creation/drafting, and it enables scanned images and files to be attached to each contract. It offers provides the ability to add user-defined fields, custom ad-hoc query tool, flexible searching, and full report builder.

Contract Insight enables organizations to effectively manage contracts, reduce contract management costs, and streamline workflow--all to save you and your organization money. Our proven system can save you thousands, even millions of dollars by automating the contract management process. Also, Contract Insight reduces your computer costs by utilizing our state-of-the-art web-based technologies.

Contract Insight is a complete tool for web-based contract and committal management. It is Internet-based software that enables users to access their contracts via a web-browser with no client PC installation. With anytime, anywhere access, you can work from the office, home or on the road with easy access to contract information, your remote workforce can access contract and diary information with the ability to enter new contracts, run reports, and perform text-based searches.

For the best viewing and navigation, the following is recommended:

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1. Ensure that your screen resolution is set to 1024x768 or higher.
2. Ensure that you are working with the full screen. Reducing/shrinking the window that the application is running in can cause viewing problems.
3. Ensure that magnification of the screen is set to 100% or lower. Anything larger than 100% can cause viewing problems.
4. Remove excessive browser toolbars as this may cause viewing/navigation problems.

The following sections review all administrative aspects and functionality of the Contract Insight Application.

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Best Practices Recommendations

Best Practices Recommendations

For Best Viewing and Navigation

- Ensure that your screen resolution is set to 1024x768 or higher.
- Ensure that you are working with the full screen. Reducing/shrinking the window that the application is running in can cause viewing problems.
- Ensure that magnification of the screen is set to 100% or lower. Anything larger than 100% can cause viewing problems.
- Remove excessive browser toolbars as this may cause viewing/navigation problems.

Implementation-Master Reference Data

- Provides the base setup information in order to successfully create efficient contracts.
- Master Reference Data should be entered in the following order:
    - Departments/Divisions
    - Contract Statuses
    - Categories
    - Locations
    - Contract Occurrence
    - Contract Types
    - Employee List
    - Vendor/Customer List
    - Contract Records
- Bulk Importing of Master Reference Data
    - Should be performed by an Application Administrator
    - Data should be imported in the recommended order above.
    - Read the Bulk Importing instructions listed on the importing wiki page carefully before starting the import process.

Implementation-User Defined Fields

- Plan what user-defined fields will be needed to capture additional information for the following tables/areas before entering into Contract Insight:
    - Employee Table
    - Vendor/Company Table
    - Contract Record Table
- Note the type of data as well as the amount of data that needs to be captured must be taken into consideration:
    - The system will not permit duplicate custom field names. It is highly important to note current/existing fields before entering a new field.
    - Once user-defined fields have been entered, the length of the field can only be changed by a database administrator. This will help preserve the integrity of the data.
    - Once user-defined fields have been entered, the field type can only be changed by a database administrator. This will help preserve the integrity of the data.
    - It is recommended to never delete a field that contains data.

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- Once a field that contains data has been deleted, ALL DATA WILL BE LOST.
- Field Types for User-Defined fields that are available:
    - Text Box
    - Multi-Line Text Box
        - The Multi-Line Text field type is similar to the Text field type in that it can be used to save characters or a mix of characters and numbers. This multi-line text box differs from a text box in that the user can enter multiple lines of text into multiple lines (the text box will not wrap into multiple lines as a multi-line text box will).
        - Define the MAXIMUM number of characters (of data) that the field would need to contain (from 1 to 4000)
        - No default values should be entered.
    - Multi-Select List
        - The Multi-Select field type can be used to create a custom field that contains list items to pick from. This differs from a Drop Down in that the user can select multiple items from the list.
        - Plan and list the values that will be options for the Drop Down
        - When entering into Contract Insight, values should be listed in the “Default Values” box, separated by commas, using no space after the commas.
    - Drop Down
        - The Drop Down field type can be used to create a custom field that contains list items to pick from.
        - Plan and list the values that will be options for the Drop Down
        - When entering into Contract Insight, values should be listed in the “Default Values” box, separated by commas, using no space after the commas.
    - Integer
        - The Integer field type can be used to save integer numeric values. This can be used for whole numbers.
        - No default values should be entered.
    - Currency
        - The Currency field type can be used to create a field that can save currency data.
        - When planning and entering, be sure to allow enough characters to capture all necessary data.
        - No default values should be entered.
    - Date
        - The Date field type can be used to create custom fields that can save dates. Dates should be formatted as 'mm/dd/yy' or 'mm/dd/yyyy'.
        - No default values should be entered.
    - Slider
        - The slider field can be utilized as a Drop Down box would be to List items
        - The slider can also be used as a form of a confirmation that a user can fill in with a blank value to force a separate selection or separate agreement.

Assigning Fields by Contract Type

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- If your organization decides to assign fields by contract type:
- If fields are assigned for at least on contract type, it is recommended to assign fields for all contract types, even if the Contract Type should contain all fields.
- Before assigning fields by contract type, note in the Field Manager all fields that are required.
- Required fields need to be added to ALL contract types
- Add all fields in the “Tip” box in the right hand side of the “Assign Fields by Contract Type” screen. This will ensure that the Contract Record is added and recorded into Contract Insight in the most efficient manner.

Adding Employees/Users

- Enable Organizational Policies that require users of the system to change his/her password regularly.
- Enforce password complexity settings for Contract Insight passwords.
- All usernames MUST be unique.
- Never share passwords.

Ad-Hoc Searches/Report-Report Creation

- Specify a Report Name that is succinct, descriptive and specifies the intent and scope of the report.
- Select the Primary Focus Table.
    - 99% of all meaningful Ad-Hoc reports, for the vast majority of Contract Insight User Communities, use the “Contract Details” Table as the Primary Focus Table because it is the primary table and focus of the Contract Insight System.
- You may select/specify any number of Master Reference Tables to be included in a report.
- Select/Specify only the Additional Linked Tables that are absolutely necessary for the scope and intent of your report. More than required is not a good thing. It adds overhead to the report.
- Select/Specify only the fields that are absolutely necessary for the scope and intent of your report. More than required is not a good thing. It adds overhead to the report.
    - If the report is intended for use in dashboards, limit the number of fields to a maximum of 6-10 (depending on the width of the specified fields).
- Specify unique “Display Name” (optional) for each of the fields that are specified/selected as part of the report.
- Ensure that there are no duplicate “Display Names” within the universe of selected/specified fields for the report.
- Keep the target audience in mind and remember to use only abbreviations that will be meaningful and intuitive to the target audience.

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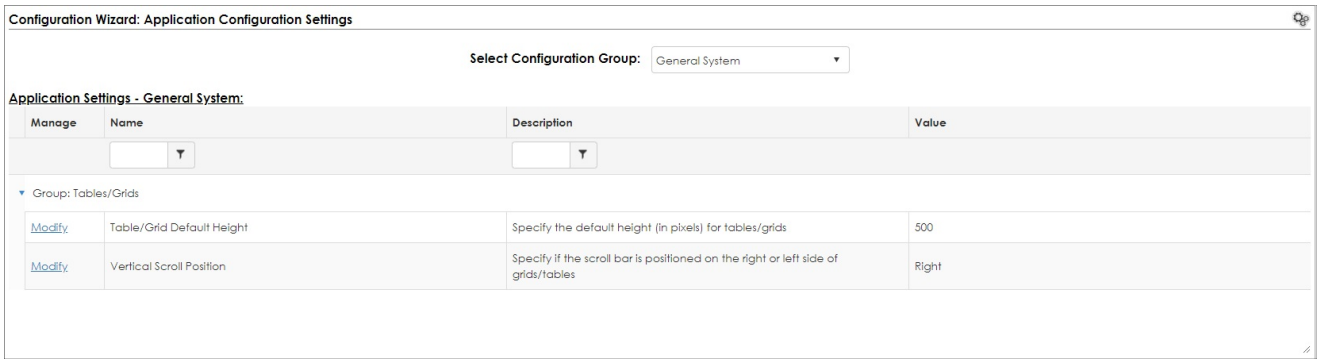
Configuration Group: General System

Configuration Group: General System

Application Configuration: Config Settings

Configuration Group: General System

The General System configuration group includes application configuration settings for table/grid configuration in your Contract Insight application.



Table/Grid Default Height: This setting is used to specify the default pixel height for tables/grids.

Vertical Scroll Position: This setting is used to specify if the grid/table vertical scroll bar is positioned on the Left or Right side.

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Disclaimer of Warranty

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THIS SOFTWARE AND THE ACCOMPANYING FILES ARE SOLD "AS IS" AND WITHOUT WARRANTIES AS TO PERFORMANCE OF MERCHANTABILITY OR ANY OTHER WARRANTIES WHETHER EXPRESSED OR IMPLIED. Because of the various hardware and software environments into which the product may be put, NO WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE IS OFFERED.

Good data processing procedure dictates that any program be thoroughly tested with non-critical data before relying on it. The user must assume the entire risk of using the program. ANY LIABILITY OF THE SELLER WILL BE LIMITED EXCLUSIVELY TO PRODUCT REPLACEMENT OR REFUND OF PURCHASE PRICE.

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System Requirements

System Requirements

System Requirements

Contract Insight is installed on a MS Windows network server and can be accessed by an Internet browser (like Microsoft Internet Explorer), and be used on a Local Area Network (LAN) and Wide Area Network (WAN) in a multi-user environment.

Server Requirements (in a non-hosted environment)

- Network SQL Server with (minimum) a Dual-Core CPU [2GHz]; (recommended) a Quad-Core [2GHz].
- Microsoft Windows 2012 Server, or Windows 2012 R2 Server, or Windows 2016 Server operating system running Internet Information Server (IIS); Virtual Servers are supported but all minimum and recommended specifications must be dedicated.
- Microsoft SQL Server 2012, 2014, or 2016 required.
- RAM of (minimum) 6 GB (or better); (recommended) 8+ GB.
- 50 GB of hard-disk space required (after installation of the OS and IIS).
- VGA or higher-resolution monitor.
- Mouse or compatible pointing device.
- Network Interface Card.
- Backup tape recommended.
- Alternative power supply (UPS) recommended.

Workstation Requirements

Contract Insight is a fully web-based product. There is no need to install software on each PC workstation that will be utilizing the software. Any computer operating system can access the Contract Insight server as long as it is running a current web-browser (within two releases of the latest). Wireless computers and hand-held devices that have an Internet browser can access Contract Insight as well.

Optional Recommendations

- Scanner Hardware (Document feeder and industry class recommended)
- Scanner Software (normally provided with the scanner)

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Department/Division Management

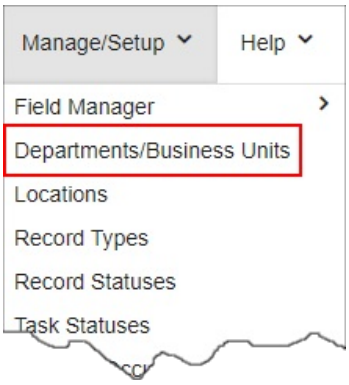
Department/Division Management

Master Reference Data Management: Department/Division

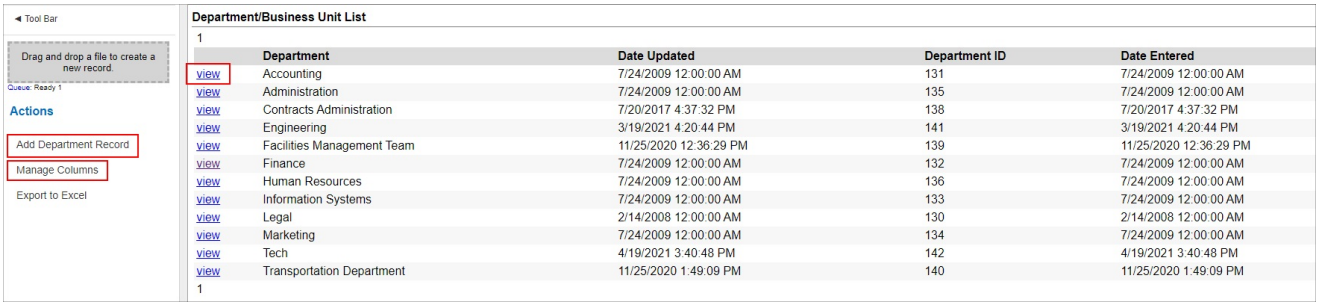
Contract Insight supports the ability to assign departments/divisions to your contracts and to your employees. Only Application Administrators may manage departments (or other authorized users).

To Add a Department/Division

1. Select **Departments/Business Units** from the **Manage/Setup** top navigation menu item.



2. This will open the **List Manager** screen, listing all of the departments/divisions already in your Contract Insight application.



	Department	Date Updated	Department ID	Date Entered
view	Accounting	7/24/2009 12:00:00 AM	131	7/24/2009 12:00:00 AM
view	Administration	7/24/2009 12:00:00 AM	135	7/24/2009 12:00:00 AM
view	Contracts Administration	7/20/2017 4:37:32 PM	138	7/20/2017 4:37:32 PM
view	Engineering	3/19/2021 4:20:44 PM	141	3/19/2021 4:20:44 PM
view	Facilities Management Team	11/25/2020 12:36:29 PM	139	11/25/2020 12:36:29 PM
view	Finance	7/24/2009 12:00:00 AM	132	7/24/2009 12:00:00 AM
view	Human Resources	7/24/2009 12:00:00 AM	136	7/24/2009 12:00:00 AM
view	Information Systems	7/24/2009 12:00:00 AM	133	7/24/2009 12:00:00 AM
view	Legal	2/14/2008 12:00:00 AM	130	2/14/2008 12:00:00 AM
view	Marketing	7/24/2009 12:00:00 AM	134	7/24/2009 12:00:00 AM
view	Tech	4/19/2021 3:40:48 PM	142	4/19/2021 3:40:48 PM
view	Transportation Department	11/25/2020 1:49:09 PM	140	11/25/2020 1:49:09 PM

3. Click **Add Department Record** on the side menu.

4. Enter the name of the new department/division and click **Save**.

To Edit/View a Department/Business Unit

1. Click **View** for the department/division line item you would like to view/edit.

2. This will open the **Departments/Business Unit Configuration** screen.

3. To edit the name of the department/division, click the **Pencil Icon** for the **Department Name** line item.

4. Edit the text for the name of the department and click **Save Changes**.

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To Delete a Department/Division

Note: Prior to deleting a department/division, make sure it is not being used by any contract records.

1. Go to the **Departments/Business Unit** screen for the line item you would like to delete.

2. Click the **Delete** on the side menu.

3. Confirm the deletion.

Manage Columns Button:

Note: The Manage Columns button allows users to view additional columns of information available for the table selected.

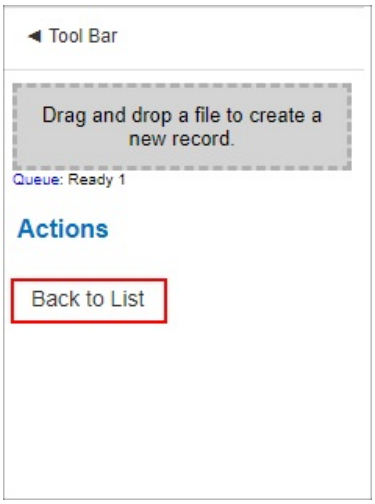
1. Click **Manage Columns** on the side menu.

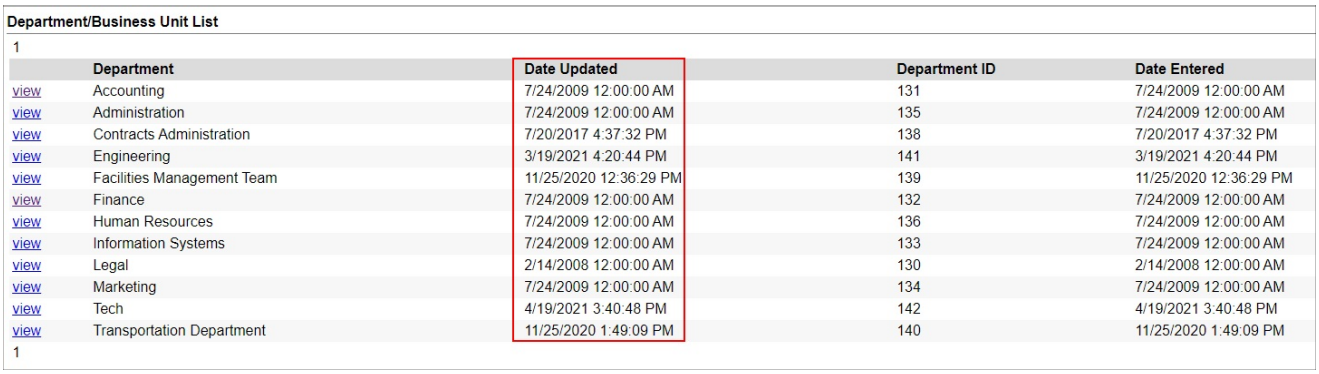
2. On the next screen, select the field you want to add under the Unassigned Columns List, and click **Add** next to the field to add your selection to the left-hand column.

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3. Once added, click **Back to List** on the side menu. The column added displays.





Department/Business Unit List

1

	Department	Date Updated	Department ID	Date Entered
view	Accounting	7/24/2009 12:00:00 AM	131	7/24/2009 12:00:00 AM
view	Administration	7/24/2009 12:00:00 AM	135	7/24/2009 12:00:00 AM
view	Contracts Administration	7/20/2017 4:37:32 PM	138	7/20/2017 4:37:32 PM
view	Engineering	3/19/2021 4:20:44 PM	141	3/19/2021 4:20:44 PM
view	Facilities Management Team	11/25/2020 12:36:29 PM	139	11/25/2020 12:36:29 PM
view	Finance	7/24/2009 12:00:00 AM	132	7/24/2009 12:00:00 AM
view	Human Resources	7/24/2009 12:00:00 AM	136	7/24/2009 12:00:00 AM
view	Information Systems	7/24/2009 12:00:00 AM	133	7/24/2009 12:00:00 AM
view	Legal	2/14/2008 12:00:00 AM	130	2/14/2008 12:00:00 AM
view	Marketing	7/24/2009 12:00:00 AM	134	7/24/2009 12:00:00 AM
view	Tech	4/19/2021 3:40:48 PM	142	4/19/2021 3:40:48 PM
view	Transportation Department	11/25/2020 1:49:09 PM	140	11/25/2020 1:49:09 PM

1

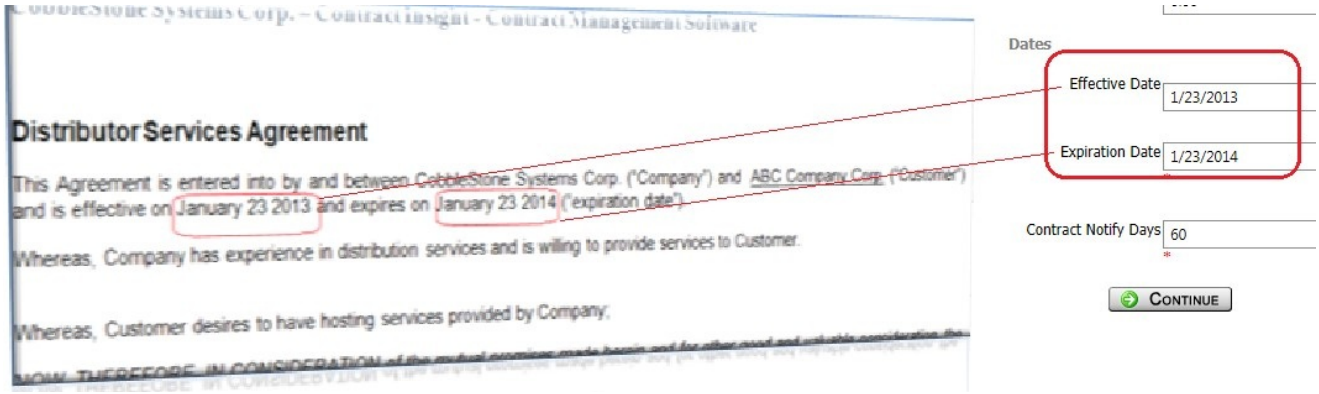
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Auto Extract Text

Auto Extract Text

Master Reference Data: Contract Insight Enterprise Auto-Extract

With CobbleStone Contract Insight Enterprise, managing contracts just got easier with the auto-extract feature. CobbleStone Contract Management Software Enterprise Edition provides better usability via the **add contract from file** feature found in earlier versions. Below are some features that help your team add contracts faster with a file auto-extract feature. [Note: this feature is not the same as a the bulk auto-extract feature that can traverse through a directory of files in a folder OCR the file and extract text based on rules and auto import the data into the Enterprise system]. This in-application feature is built to help contract professionals add contracts to the system (on an ongoing basis) faster with an auto extract feature and when coupled with the existing workflow (field monitoring), the system can auto validate field and clause data and route workflow tasks based on set conditions).

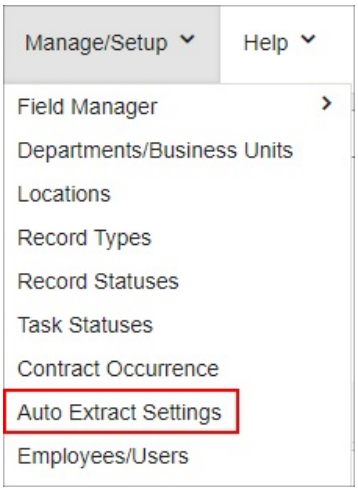


Contract Insight Auto Extract Text and Field Mapping

CobbleStone Contract Insight Enterprise includes an improved feature related to the existing **add contract from file** feature found under the **Contracts** top menu.

Contract Insight Enterprise provides better contract processing and control with the 'add contract from file' feature found in earlier versions. This includes the ability to map out areas of standard formatted contract files related to newly added contract records (via **Contracts - Add Contract From File**). This feature offers auto (configured) extract fields & sections of the document to Contract Fields on the Contract Record and detects if the file is a non OCRed PDF file, the system will enable a PDF OCR feature (note: OCR results & speed may vary) (in-system auto extract works well with MS Word Documents and PDF Documents). Prior to using this auto extract feature, the rules for the auto extract must be set up by an application configuration user (System Admin User) via the **Manage/Setup - Auto Extract Settings** menu option (image seen below).

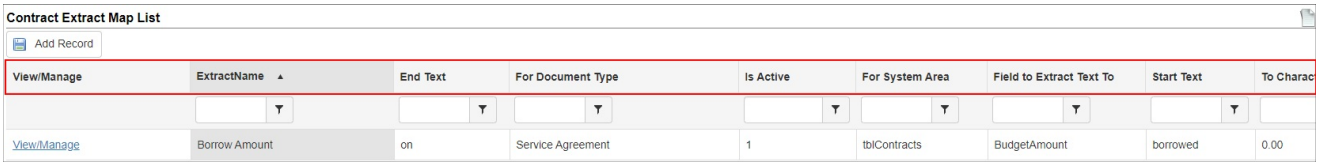
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Simple Configuration Example

The System Admin User should configure these auto extract rules for standard contract documents (hence, contracts that have similar layouts like, NDA, leases, licenses, etc.). Below is a typical screen shot of some simple configurations.

As an example, the line item (in the image below) titled **Borrow Amount** is set to recognize an amount for **Service Agreement** Contract Types and extract date text between the areas that start with borrowed and ending with on. It will auto map (if the data is valid) in to the Contract **BudgetAmount** field.



Your system should be configured by a trained System Administrator and your actual system's configuration will vary from the example provided.

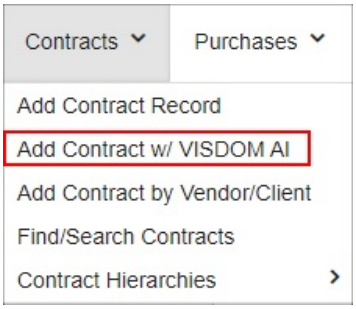
Below are some features that help your team add contracts faster with a file auto-extract feature. [Note: this feature is not the same as a the bulk auto-extract feature that can traverse through a directory of files in a folder OCR the file and extract text based on rules and auto import the data into the Enterprise system]. This 'in-application' feature is built to help contract professionals add contracts to the system (on an ongoing basis) faster with an auto extract feature and when coupled with the existing workflow (field monitoring), the system can auto validate field and clause data and route workflow tasks based on set conditions).

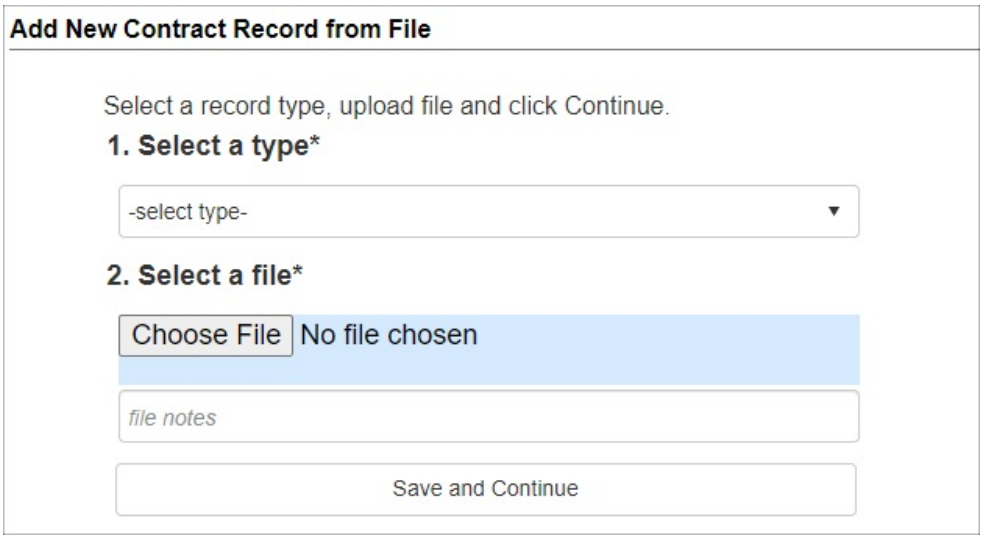
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End-User Use

The in-system auto extract features helps end-users do their job faster and (coupled with Workflow Manager) the organization monitor rules around contract data values as contracts are added to the system. For example, the end-users can use this feature to minimize their typing for larger volume of contract documents in a standard format. The organization may configure "workflow rules" via the Workflow & Alerts Manager [not discussed in this section] to send automated alerts based on Contract Field values including but not limited to contract amounts, departments, users, clauses, dates, etc.

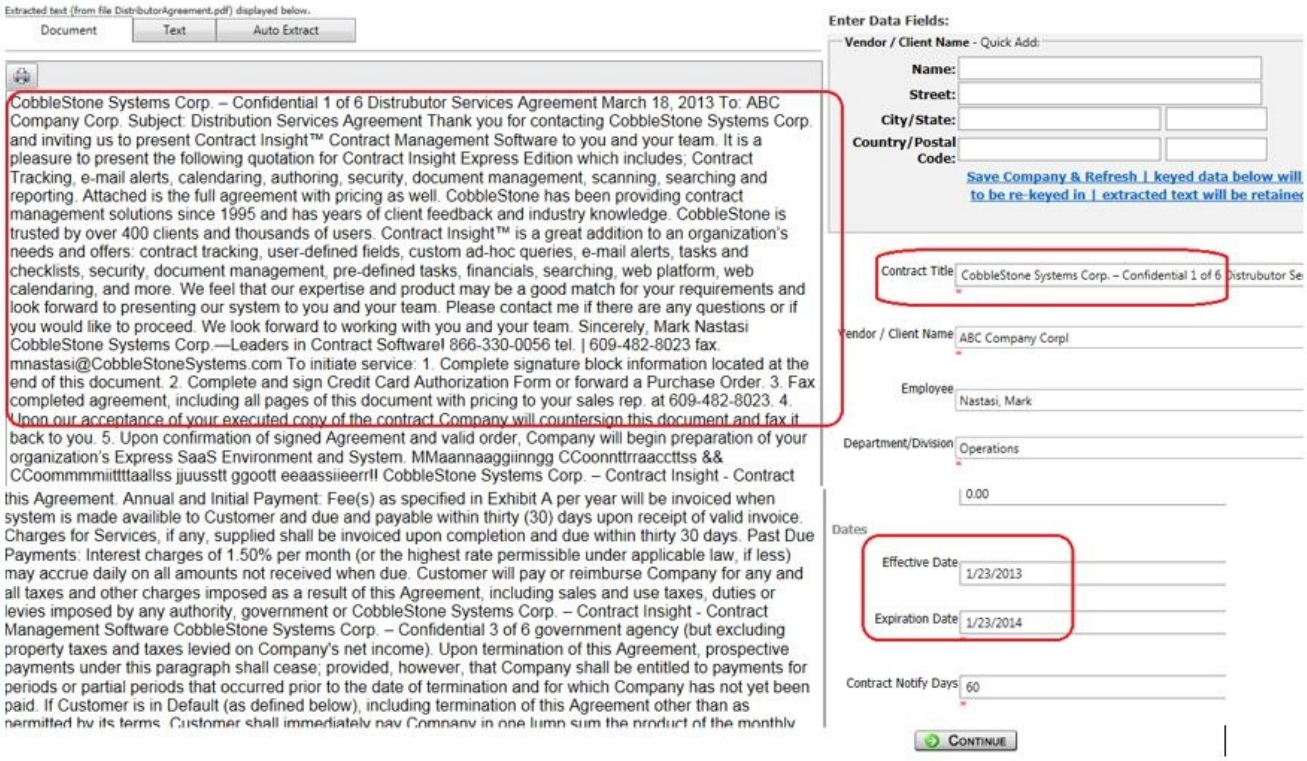
After the rules have been configured as per the instructions above, the End-User can now easily add new contract records with documents and use the auto-extract feature. [We have saved this file as PDF for example purposes but works equally as well with a Word document.]. In the image below, we select the **Add Contract w/ VISDOM AI** menu from the **Contracts** main menu and select the Distributor Contract Type and selected the correct PDF file. Then, we select a type and choose a file. Next, we click **Continue**.



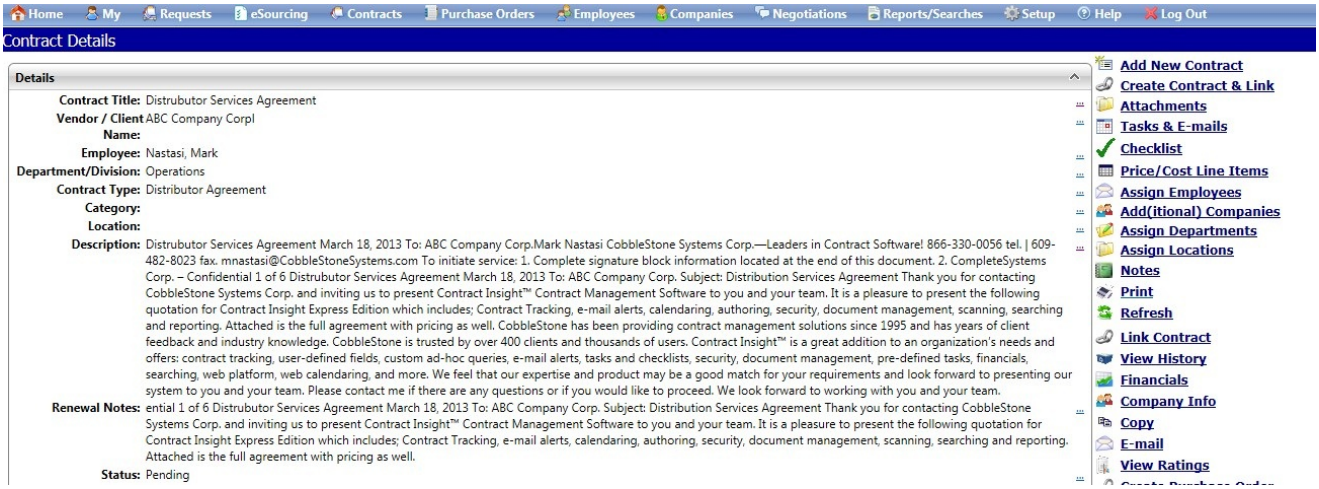


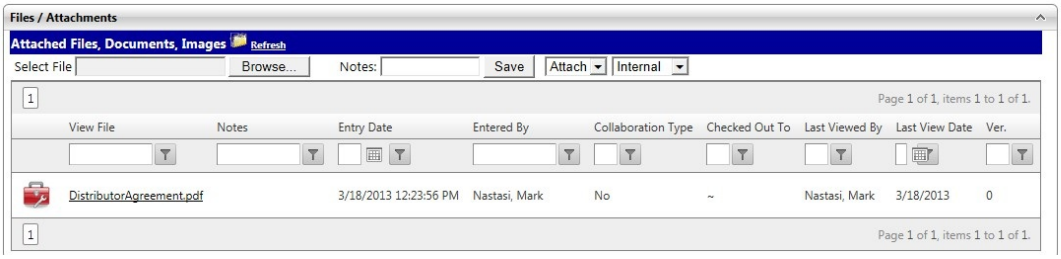
The system will attempt to auto extract text (if the PDF has not been OCRed, it will prompt you to OCR the file). Next, the system will attempt to auto extract and map fields (seen below):

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Typically, the system will auto map the fields , however, a user should review the auto extracted fields and complete any other required fields, then click **Continue** as seen above. The system will save the record, attached the original file and bring the user to **Contract Details** Screen (seen below). If there are configured Workflow monitoring rules, the workflow engine will process the Workflow tasks as configured in the Workflow manager (not seen here).





For End Users adding a contract from file please visit the Add Contracts from File Page in the wiki.

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Basic Template Management

Basic Template Management

Template Management

This functionality has been updated. To view the legacy version(s) of this page, please click here.

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Contract Category Management

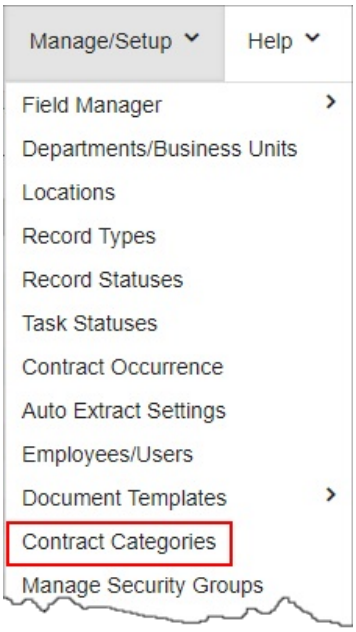
Contract Category Management

Master Reference Data Management: Contract Category

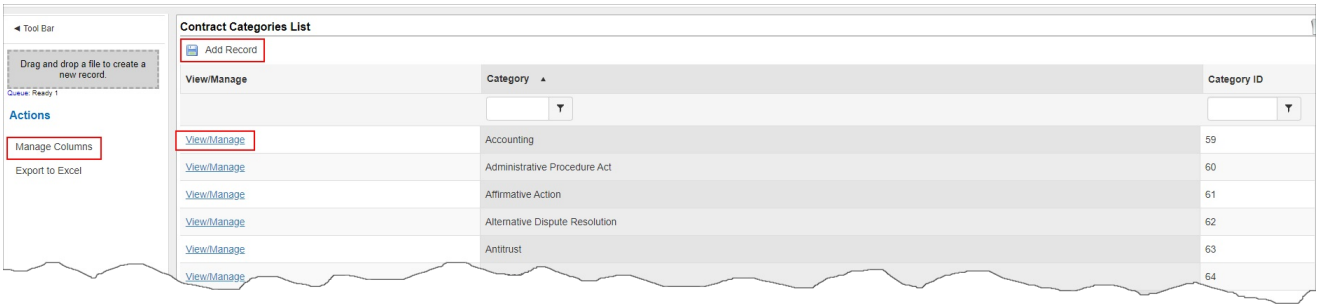
Contract Categories are used to classify contracts into categories for classifications purposes. For example, a hospital may classify contracts into in-network or out-of-network categories.

To Add a Contract Category

1. Select **Contract Categories** from the **Manage/Setup** top navigation menu item.



2. This will open the **List Manager** screen, listing all of the contract categories already in Contract Insight.



3. Click **Add Record** under Contract Categories List.

4. Enter the name of the new contract category and click **Save**.

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To View/Edit a Contract Category

1. Click **View** for the contract category line item you would like to view/edit.
2. This will open the **Category Details** screen.
3. To edit the name of the contract category, click the **Pencil Icon** for the **Category Name** line item.
4. Edit the text for the name of the category and click **Save Changes**.

To Delete a Contract Category

Note: Prior to deleting a category, make sure it is not being used by any contract records.

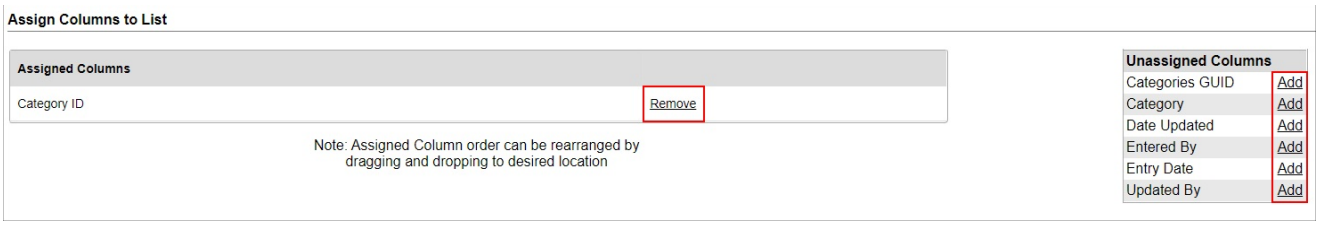
1. Go to the **Category Details** screen for the line item you would like to delete.
2. Click **Delete** in the side menu.
3. Confirm the deletion.

Manage Columns Button

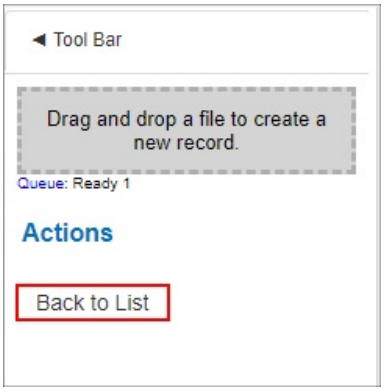
Note: The Manage Columns button will allow users to view additional columns of information available for the table selected.

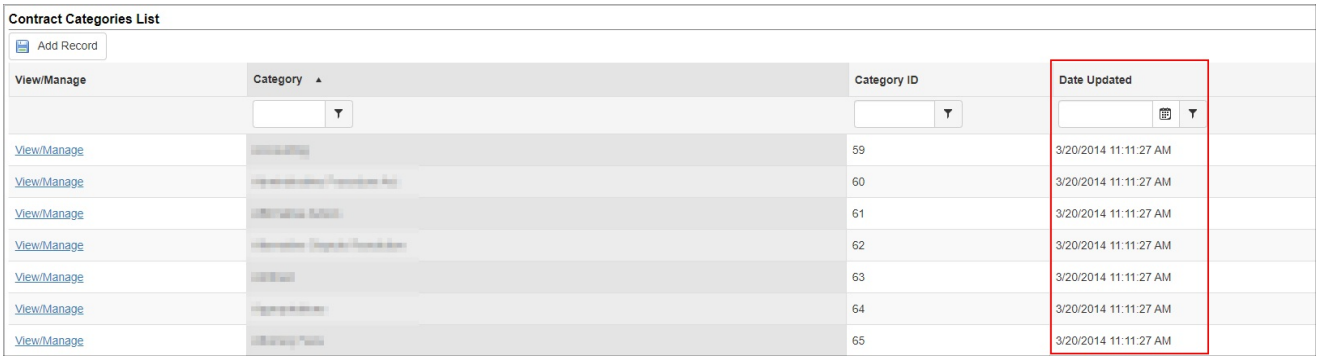
1. Click **Manage Columns** on the side menu.
2. On the next screen select the field you would like to view as a column. Click **Add** next to the desired field to move it to the left-hand column.

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3. Once added, click **Back to List** on the side menu. The column just added is visible.





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Contract Occurrence Management

Contract Occurrence Management

Master Reference Data Management: Contract Occurrence

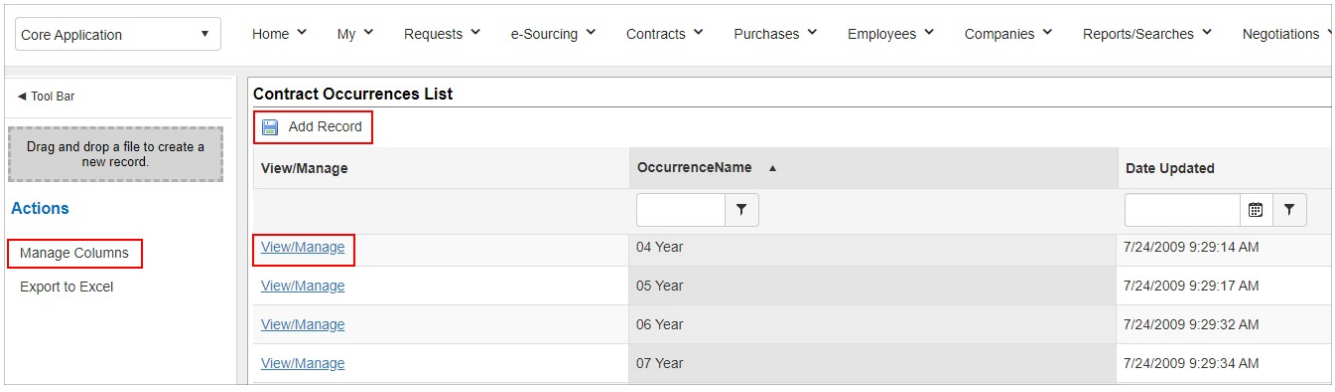
Contract Insight supports the ability to track each contract occurrence and assign occurrences to contracts. For example, a Contract may occur Monthly, Annually, Quarterly, etc.

To Add a Contract Occurrence

1. Select **Contract Occurrence** from the **Manage/Setup** top navigation menu item.



2. This will open the **List Manager** screen, listing all of the contract occurrences already in your Contract Insight application.



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3. Click **Add Record** on the side menu.

4. Enter the name of the new contract occurrence and click **Save**.

To View/Edit a Contract Occurrence

1. Click **View** for the contract occurrence line item you would like to view/edit.

2. This will open the **Occurrence Details** screen.

3. To edit the name of the contract occurrence, click the **Pencil Icon** for the **Occurrence Name** line item.

4. Edit the text for the name of the occurrence and click **Save Changes**.

To Delete a Contract Occurrence:

Note: Prior to deleting an occurrence, make sure it is not being used by any contract records.

1. Go to the **Occurrence Details** screen for the line item you would like to delete.

2. Click **Delete** on the side menu.

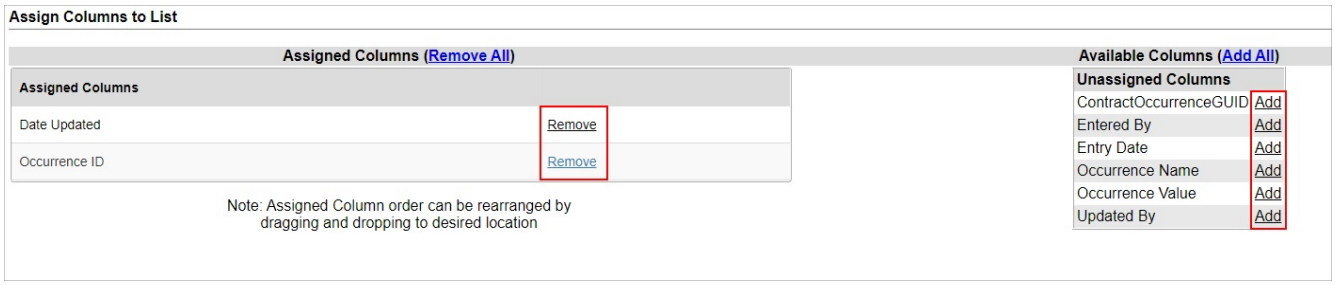
3. Confirm the deletion.

Manage Columns Button

Note: The Manage Columns button will allow you to view additional columns of information available for the table selected.

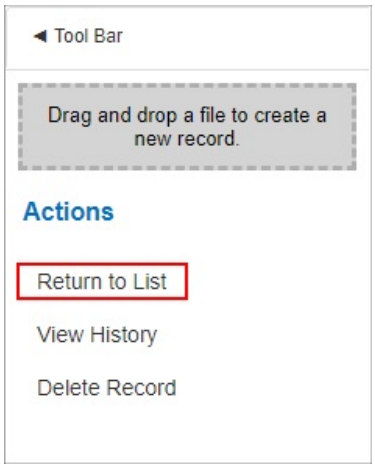
1. Click **Manage Columns** on the side menu.

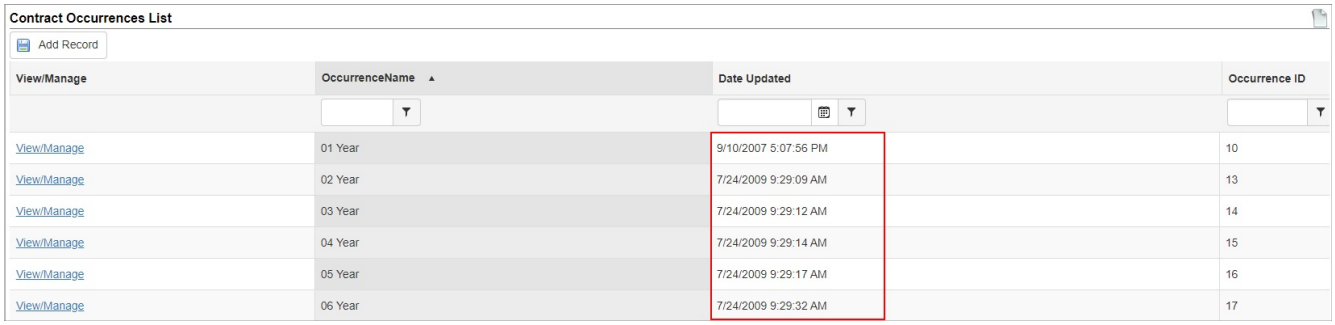
2. On the next screen, click **Add** next to the field you would like to view as a column. To remove columns, click **Remove** next to the desired column.



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3. Once added, click **Back to List** on the side menu. You will then be able to view the column just added.





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Record Status Management

Record Status Management

Master Reference Data Management: Contract Status

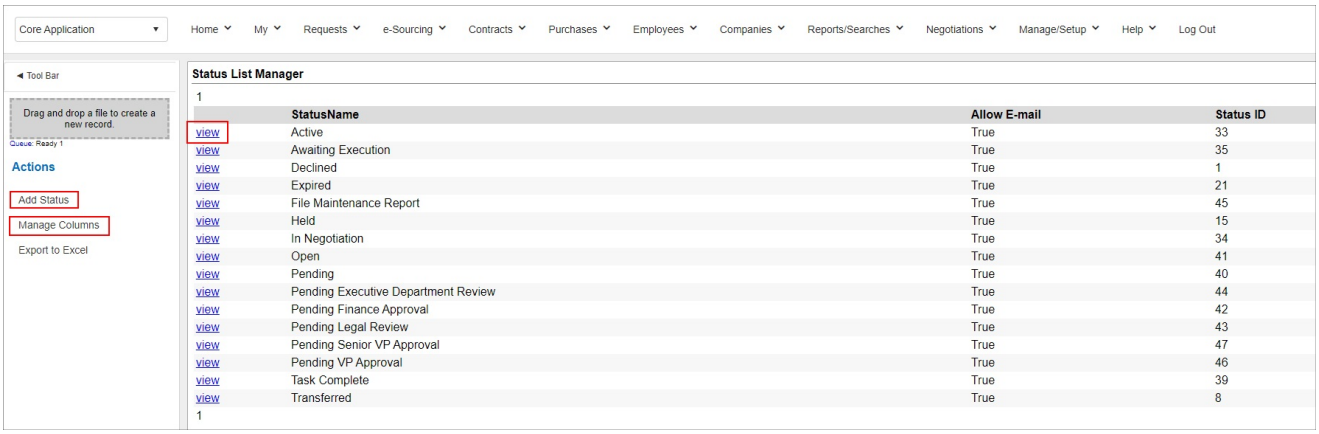
Contract Insight supports the ability to track contracts by contract status. For example, a Contract Status may be Open, Closed, Canceled, Renewed, Pending, etc. The Contract Status list can be managed by the Application Administrator.

To Add a Contract Status

1. Select **Contract Status** from the **Manage/Setup** top navigation menu item.



2. This will open the **List Manager** screen listing all of the contract statuses already in Contract Insight.



3. Click **Add Record** on the side menu.

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4. Enter the name of the new contract status and click **Save**.

To View/Edit a Contract Status

1. Click **View** for the contract status line item to view/edit.

2. This will open the **Status List Configuration** screen.

3. To edit the name of the contract status, click the **Pencil Icon** for the **Status Name** line item.

4. Edit the text for the name of the status and click **Save Changes**.

To Delete a Contract Status:

Note: Prior to deleting a status, make sure it is not being used by any contract records.

1. Go to the **Status List Configuration** screen for the line item to delete.

2. Click **Delete** on the side menu.

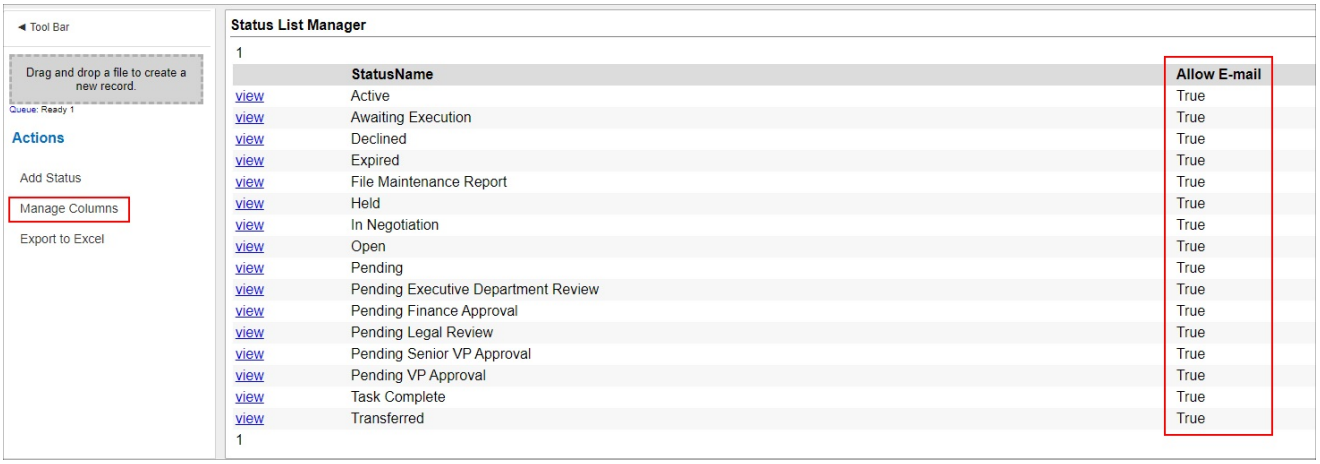
3. Confirm the deletion.

To Set a Status to Not Allow Email

Users have the option to set a Contract Record to a Status that will not send out email alerts.

Note: this should only be used for contracts that alerts are not required (i.e. Expired, Terminated).

1. Go to the **Status List Manager** screen. If the **Allow E-mail** column is not visible, it can be added by using the **Manage Columns** link on the side menu.



2. Click **View** for the Status for which to set the **Allow-Email** to False/No. Note that all Statuses, by default, are set to True/Yes.

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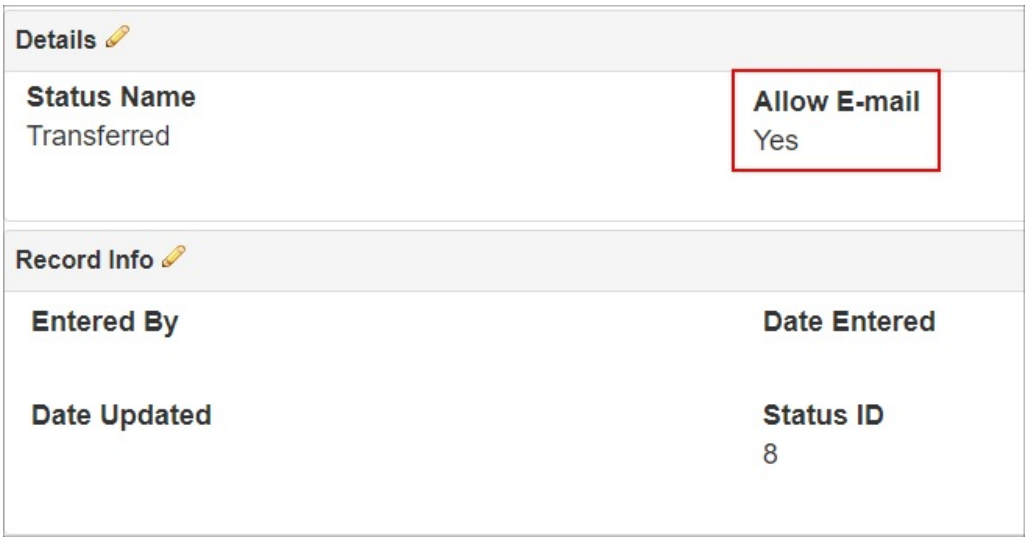
Status List Manager

1

	StatusName	Allow E-mail
view	Active	True
view	Awaiting Execution	True
view	Declined	True
view	Expired	True
view	File Maintenance Report	True
view	Held	True
view	In Negotiation	True
view	Open	True
view	Pending	True
view	Pending Executive Department Review	True
view	Pending Finance Approval	True
view	Pending Legal Review	True
view	Pending Senior VP Approval	True
view	Pending VP Approval	True
view	Task Complete	True
view	Transferred	True

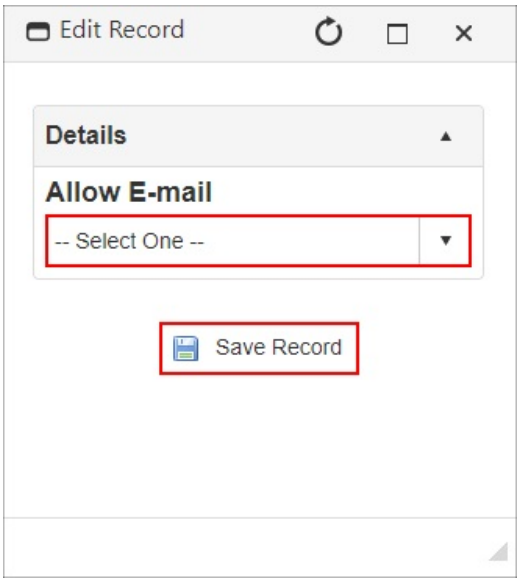
1

3. This will open the **Status List Configuration** screen. Click the **Pencil Icon** to edit the **Allow Email** item.



4. Set **Allow Email** to False/No to no longer have the regular system generated e-mail alerts sent out for the contract record when the Contract Record is set to this status.

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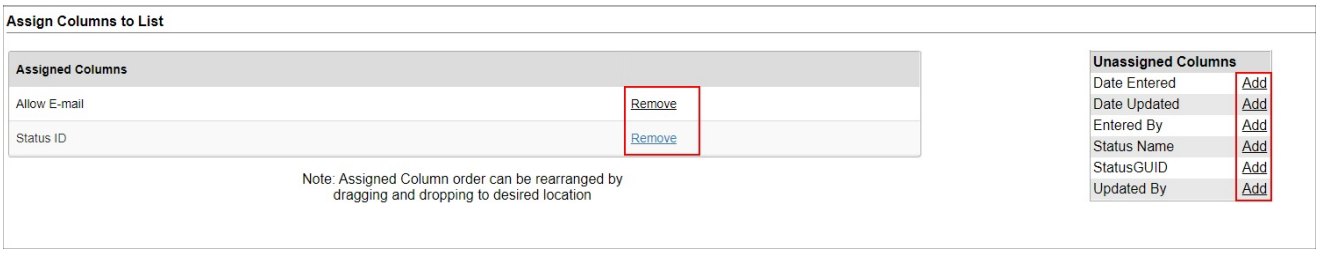
Manage Columns Button:

Note: The Manage Columns button will allow users to view additional columns of information available for the table selected.

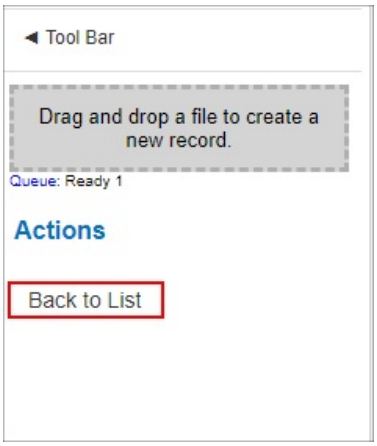
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1. Click **Manage Columns** on the side menu.

2. On the next screen select the field to view as a column. Click the **Add** button next to the desired field to move the item to the left-hand column.



3. Once added, click **Back to List** on the side menu. The column just added displays.





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Record Type Management

Record Type Management

Master Reference Data Management: Contract Type

Contract Types are used to classify contracts into types for tracking, contract creation, and field management purposes. For example, types of contracts may be Contractor Agreement, Confidentiality Agreement, Software Agreement, Land Lease, etc.

To Add a Record Type

1. Select **Record Types** from the **Manage/Setup** top navigation menu item.



2. This will open the **List Manager** screen listing all of the contract types already in Contract Insight.



3. Click **Add Record Type** on the side menu.

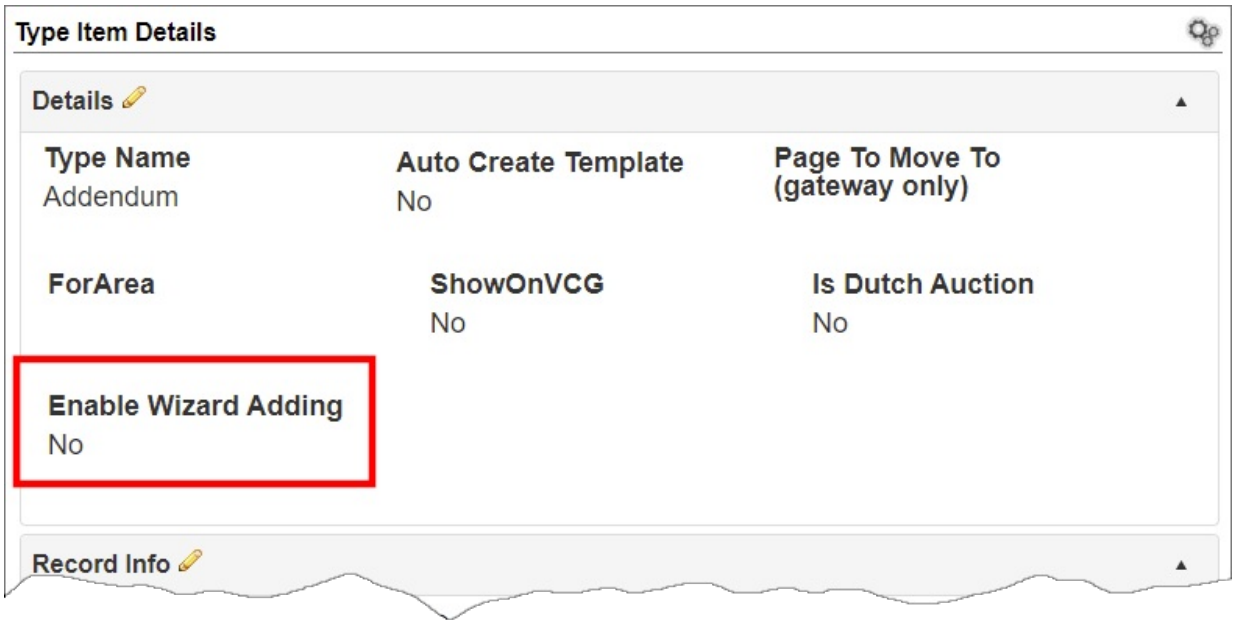
4. Enter the name of the new contract type and click **Save**.

Wizard-Based Types

Record type add-screens can be designated on the type's Details page. Wizard-based add screens take users through the add screen one field group at a time before submission.

Set **Enable Wizard Adding** to Yes to use wizard-based add screens for the type.

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To View/Edit a Record Type

1. Click **View** for the contract type line item you would like to view/edit.

2. The **Record Type Configuration** screen displays.

3. To edit the name of the contract type, click the **Pencil Icon** for the **Type Name** line item.

4. Edit the text for the name of the type and click **Save Changes**.

To Delete a Record Type

Note: Prior to deleting a record type, make sure it is not being used by any contract records.

1. Go to the **Record Type Configuration** screen for the line item to be deleted.

2. Click **Delete** in the side menu.

3. Confirm the deletion.

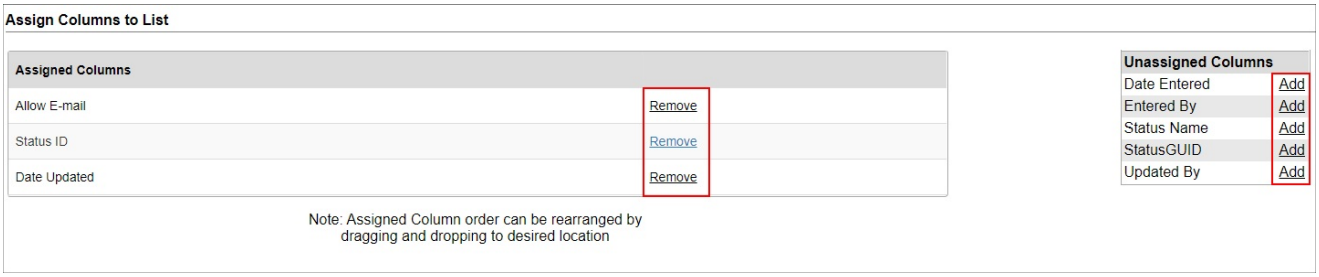
Manage Columns Button

Note: The Manage Columns button will allow users to view additional columns of information available for the table selected.

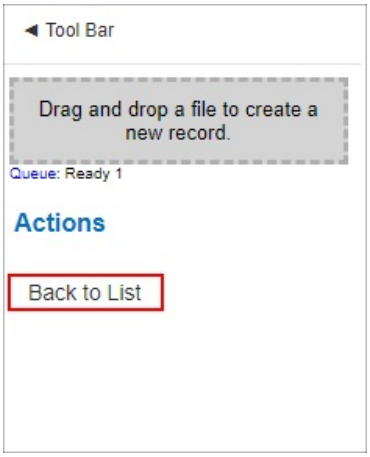
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1. Click **Manage Columns** on the side menu.

2. On the next screen select the field you would like to view as a column. Click **Add** next to the desired field to move to the left-hand column.



3. Once added, click **Back to List** on the side menu. The column just added displays.



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Location Management

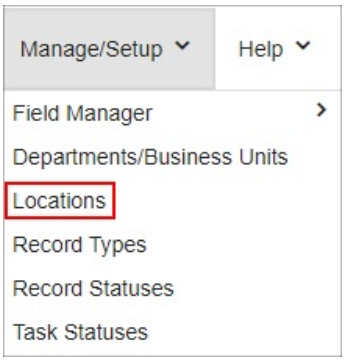
Location Management

Master Reference Data Management: Contract Location

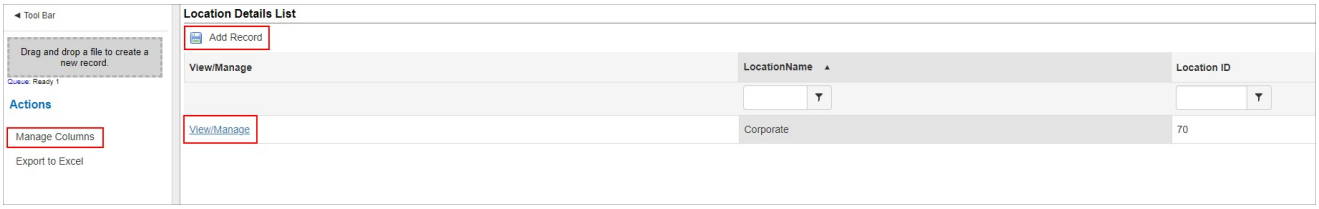
Contract Insight supports the ability to assign contracts to your organization's locations. The Location list can be administered by Application Administrators.

To Add a Location

1. Select **Locations** from the **Manage/Setup** top navigation menu.



2. This opens the **List Manager** screen, listing all of the Locations already in Contract Insight.



3. Click **Add Record** on the side menu.

4. Enter the name of the new Location and, optionally, enter the address. Click **Save**.

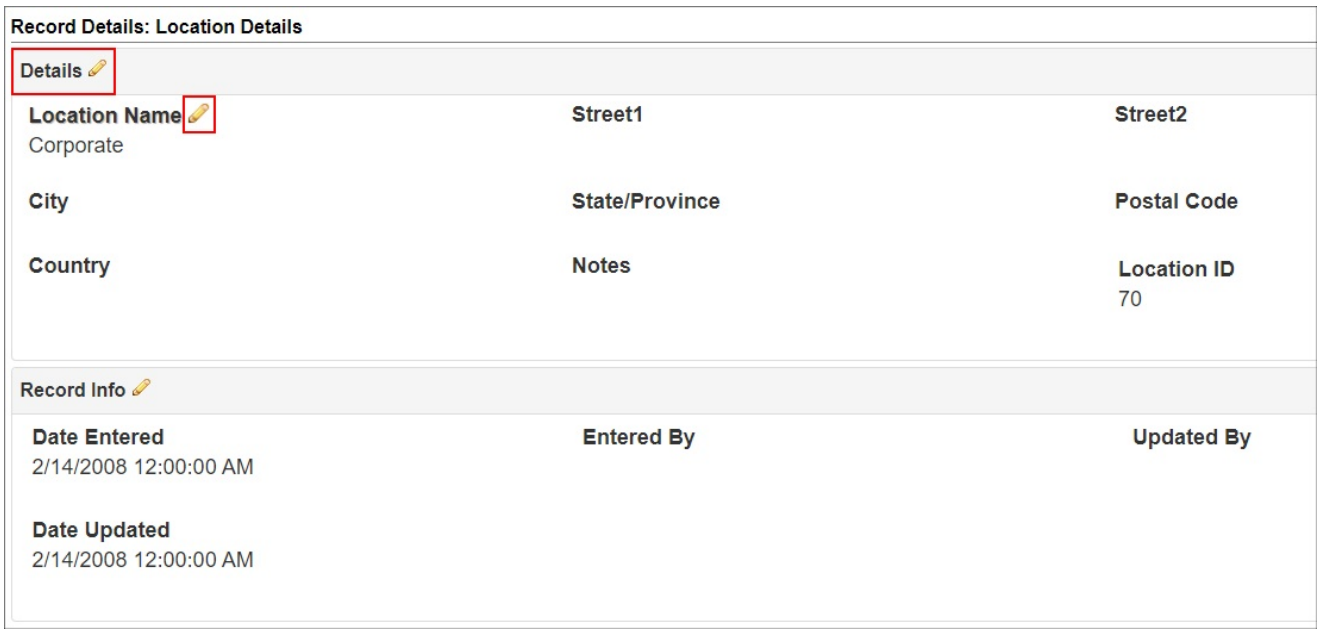
5. The **Manage Columns** button allows addition of more columns of information to this screen.

To View/Edit a Location

1. Click **View** for the Location line item to view/edit.

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2. The **Location Details** screen displays.



3. To edit the name of the location or the address, click the **Pencil Icon** for the line item.

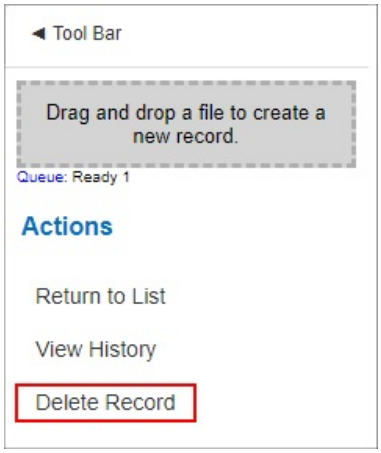
4. Edit the text for the name of the location and click **Save Changes**.

To Delete a Location

Note: Prior to deleting a location, make sure it is not being used by any contract records.

1. Go to the **Location Details** screen for the line item you would like to delete.

2. Click **Delete** on the side menu.



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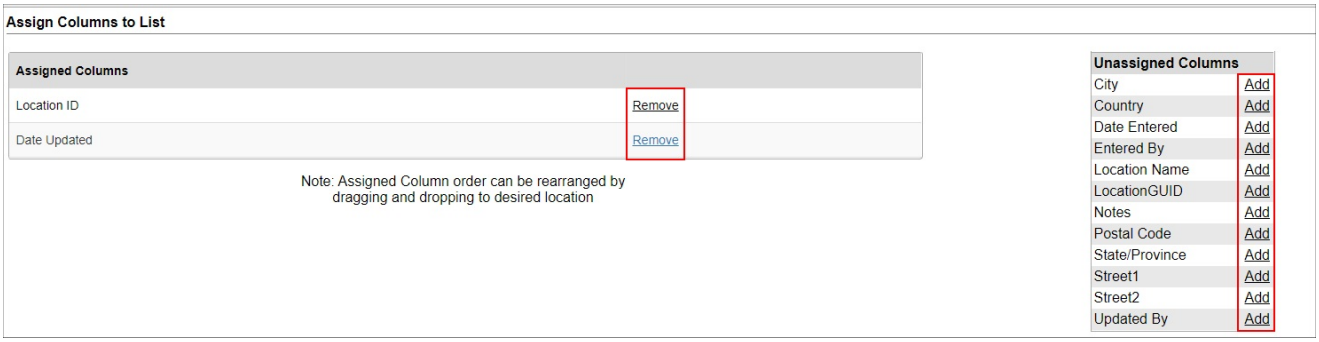
3. Confirm the deletion.

Mange Columns Button:

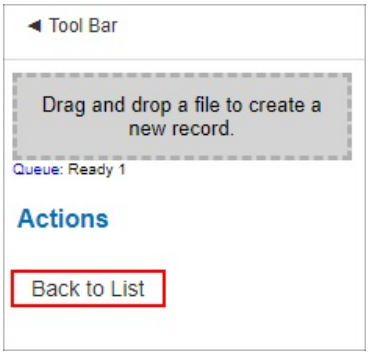
Note: The Manage Columns button allows users to view additional columns of information available for the table selected.

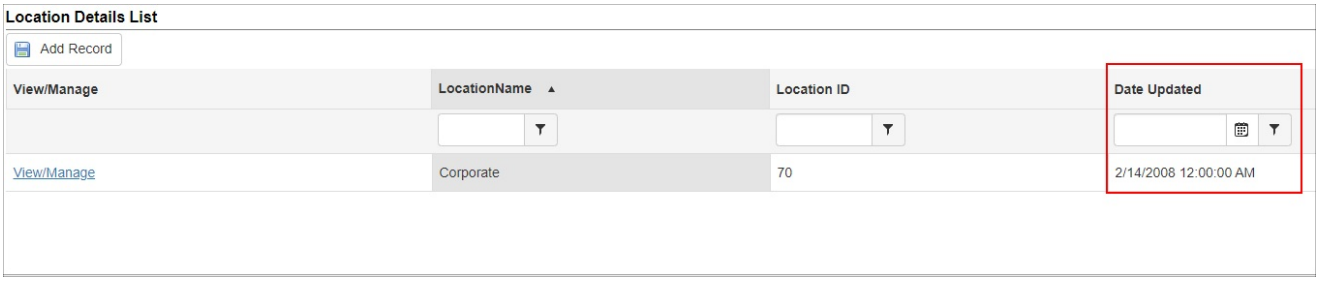
1. Click **Mange Columns** on the side menu.

2. On the next screen, select the field to view as a column. Click **Add** next to the desired field to move it to the left-hand column.



3. Once added, click **Back to List** on the right hand menu. The column just added displays.





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Clause Library Management

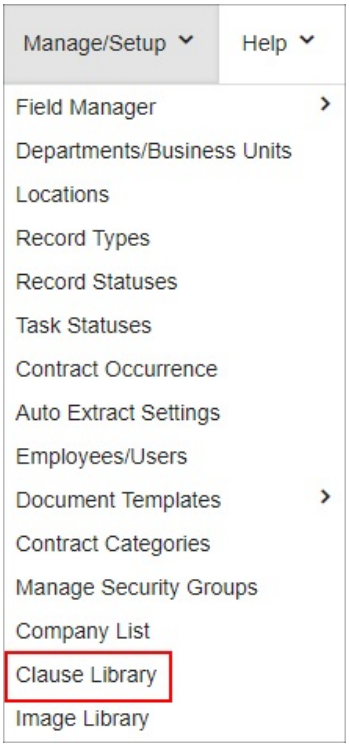
Clause Library Management

Master Reference Data Management: Clause Library

Contract Insight supports the ability to add Clauses to your application to be added to templates when using the **Template Manager**.

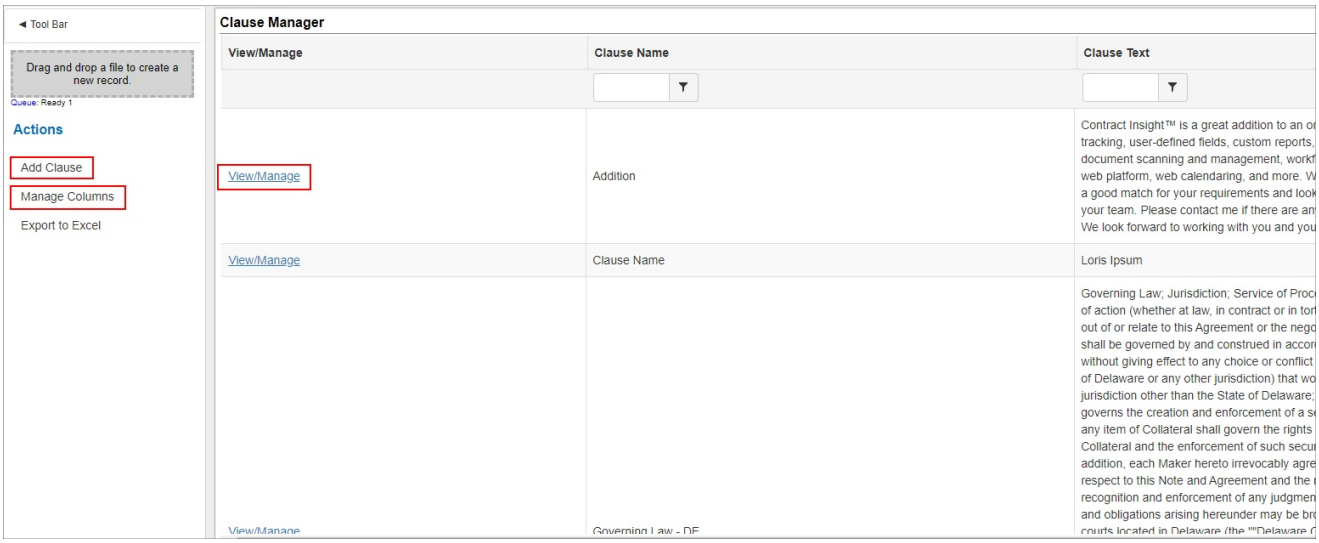
To Add a Clause

1. Navigate to **Manage/Setup - Clause Library**.



2. This opens the **List Manager** screen, displaying a list of all of the clauses already added to the application.

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3. Click **Add Clause** on the side menu.

4. Enter the clause name and clause text into the appropriate text boxes and click **Save**.

To View/Edit a Clause

1. Click **View** for the clause line item to view/edit.

2. The **Clause Details** screen displays.

3. To edit either the clause name or clause text, click the **Pencil Icon** for the appropriate line item.

4. Edit the text for the field and click **Save Changes** on the side menu.

To Delete a Clause

Note: Prior to deleting a clause, make sure it is not being used by any contract records.

1. Go to the **Clause Details** screen for the line item you would like to delete.

2. Click **Delete** on the side menu.

3. Confirm the deletion

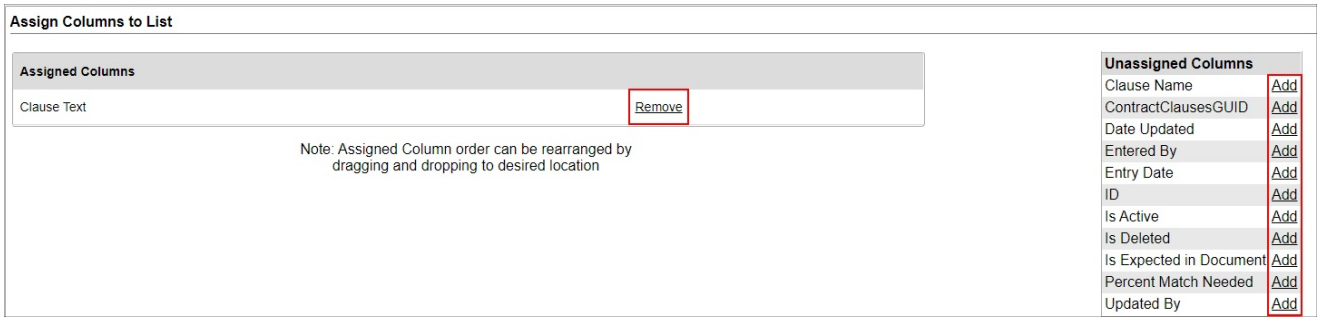
Manage Columns Button

Note: The Manage Columns button will allow you to view additional columns of information available for the table selected.

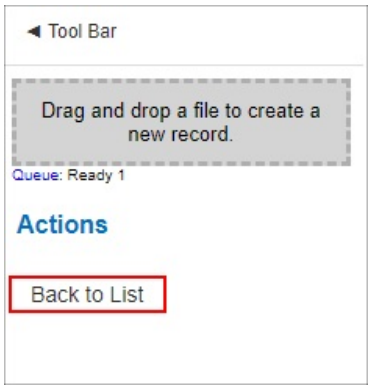
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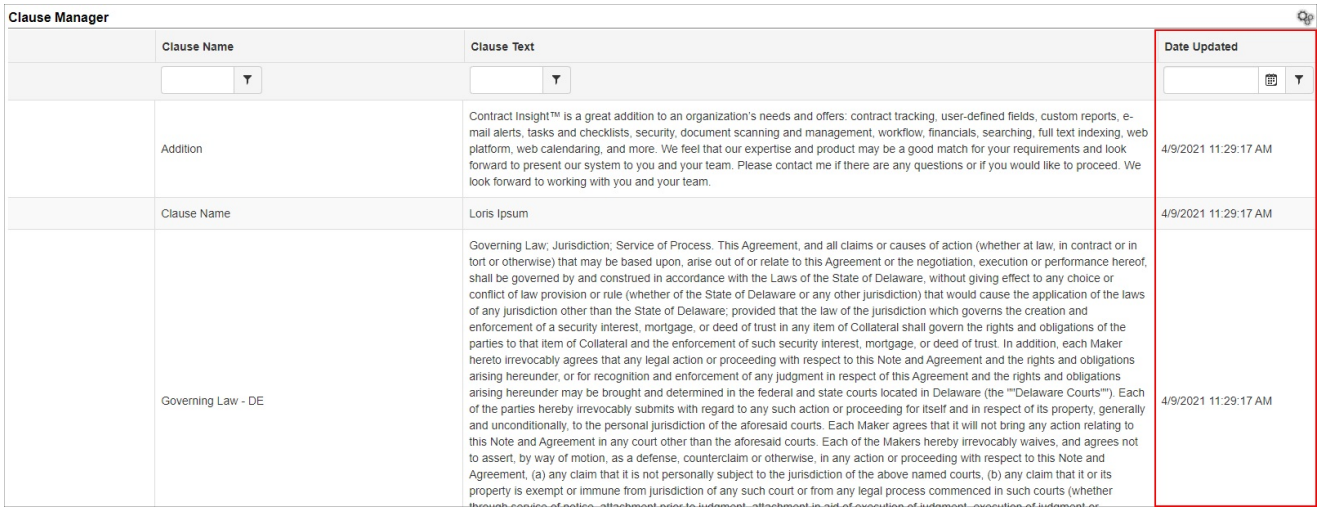
1. Click the Manage Columns button on the side menu.

2. On the next screen, select the field you would like to view as a column. Click **Add** next to the desired field to move it to the left-hand column.



3. Once added, click **Back to List** on the side menu. The column just added displays.





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File Attachment Categories

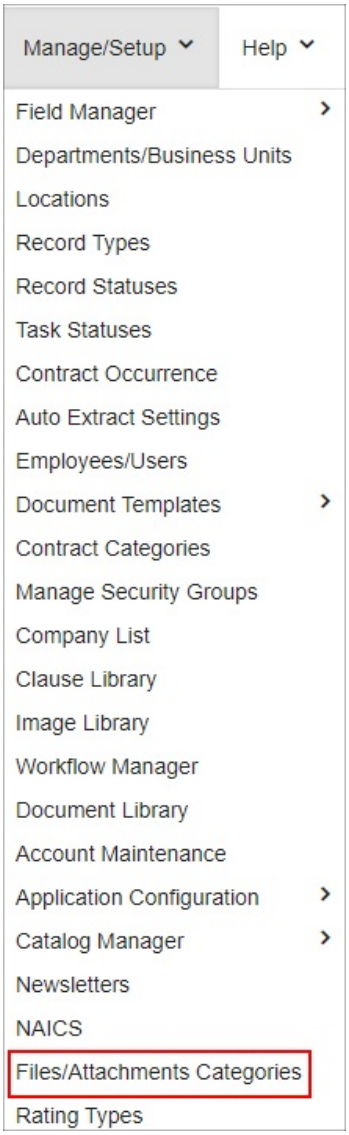
File Attachment Categories

Master Reference Data Management: File Attachment Categories

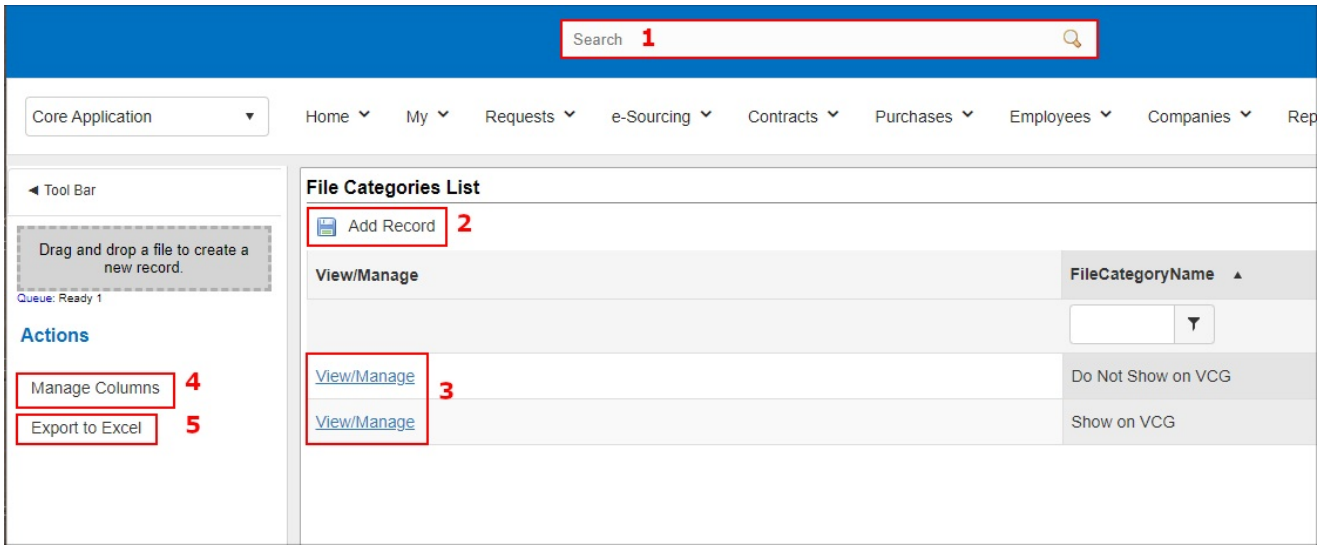
Contract Insight supports the ability to Manage the Files/Attachments Categories. In order to Manage the **File Categories List**, the user must be a system admin.

Managing Files/Attachments Categories:

Navigate to **Manage/Setup** > **Files/Attachments Categories**



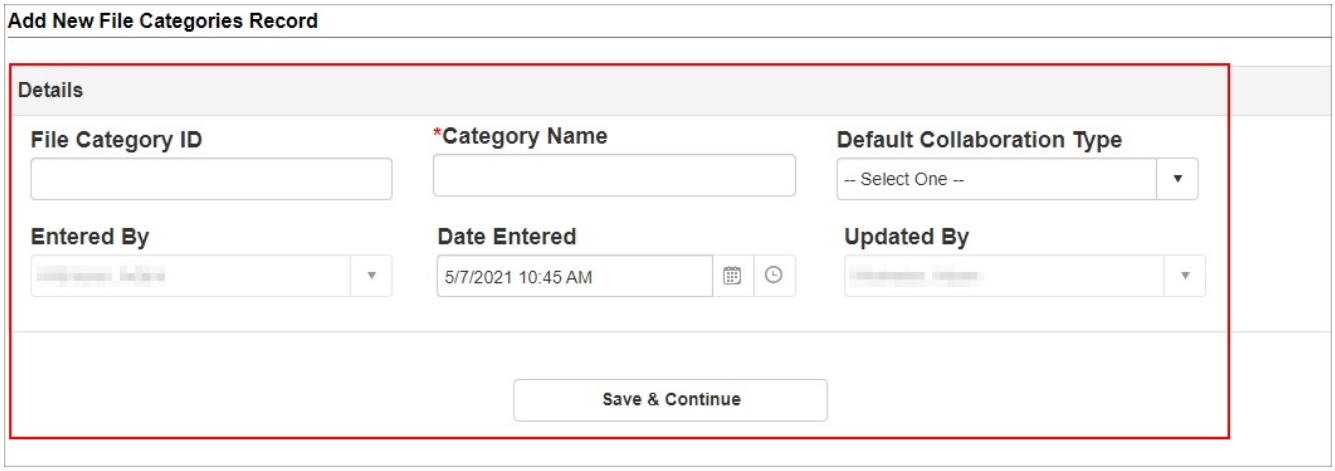
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File Categories List – Clicking this option shows the user all the File Categories that were added in the system.

Add Record – Clicking **Add Record** allows a user to add File Categories to the list just like any other Add Record button in the system.



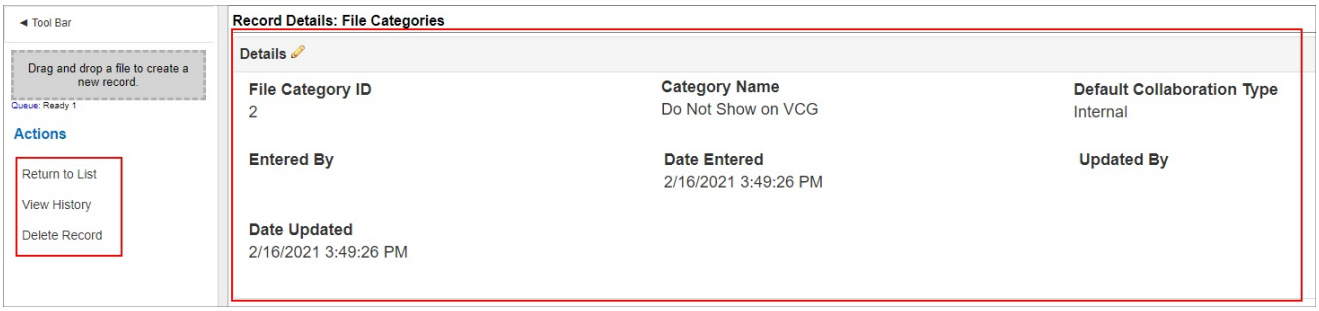


Once all required fields and any other desired fields on the Add Screen are completed, click **Save & Continue** to save the item.

View/Manage - View and Manage the File Categories.



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The **Record Details: File Categories** screen displays the fields associated with this record. From this screen, manage any of the data in the specified fields by clicking the **Pencil** icon when hovering over the right of each field. Click the **Pencil** icon to the right of the field group edit multiple fields at one time.

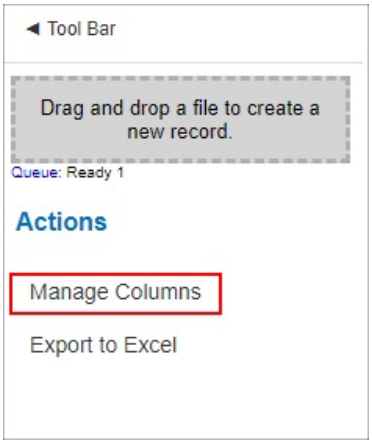
On the Side Menu under Actions:

Return to List: If clicked, the user will return to the **File Categories List** screen.

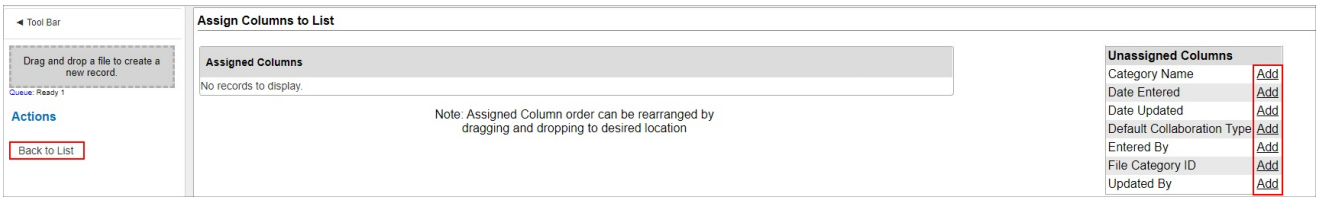
View History: If clicked, the user will be taken to the **History Details & Audit Log** screen for this record.

Delete Record: If clicked, the user is displayed a prompt: **Are you sure you want to delete this record?**" Click **Yes, delete it** to delete the record.

Manage Columns - To customize the columns displayed on the **File Categories List** screen, click **Manage Columns** on the side menu.



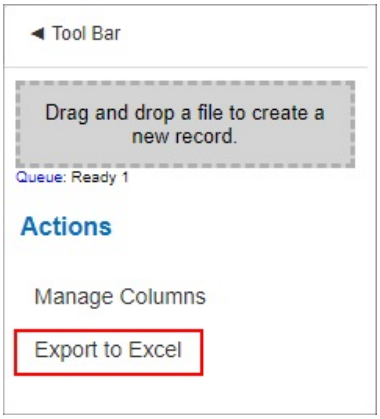
This opens the **Assign Columns to List** screen on which a user add fields to the **File Categories List** details screen.



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Once done assigning columns, click **Back to List** on the side menu.

Export to Excel – Clicking **Export to Excel** will export the **File Categories List** screen to an Excel file.



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NAICS Code Management

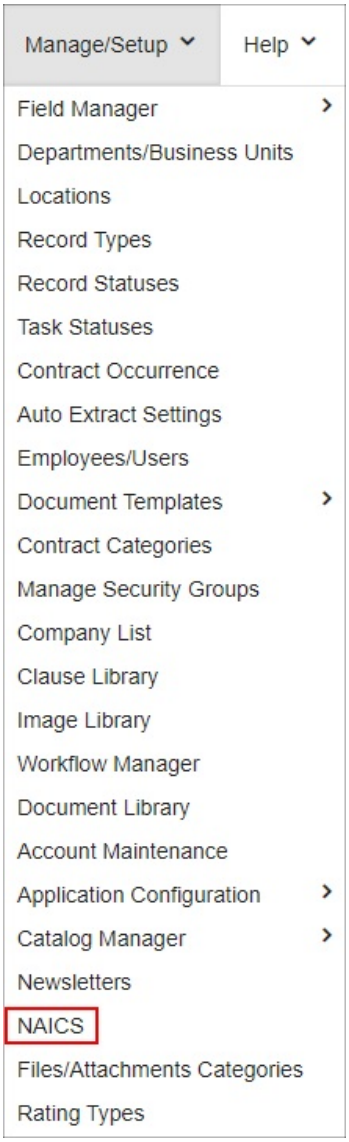
NAICS Code Management

Master Reference Data Management: NAICS Codes

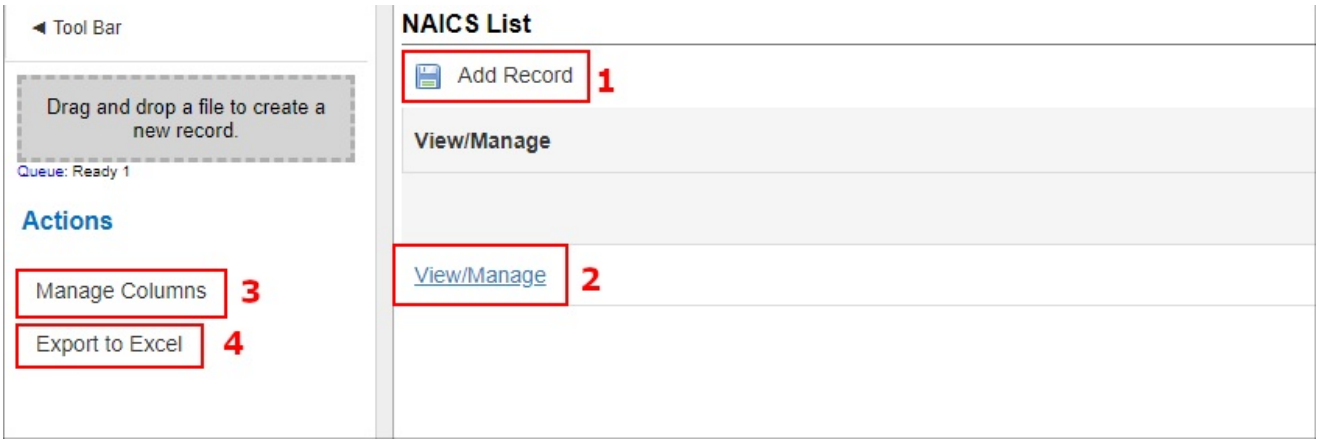
Contract Insight supports the ability to Manage the **NAICS List**. In order to Manage the area, the user must be a system admin.

NAICS Code Management

Navigate to **Manage/Setup** > **NAICS**

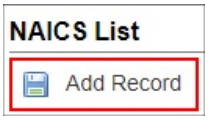


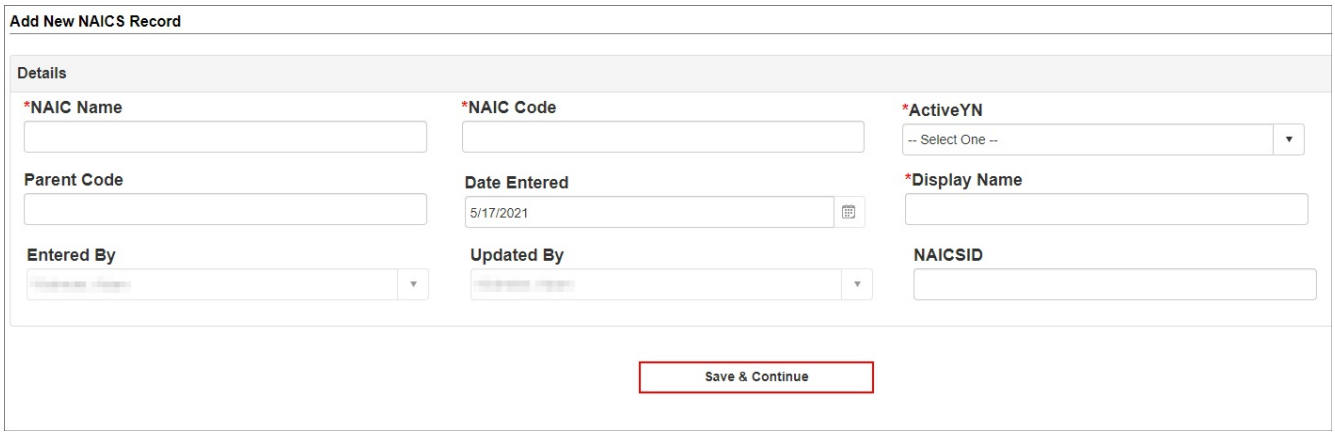
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NAICS List – This list will show you all the NAICS Codes that were added in the system.

Add Record –Clicking **Add Record** permits the user to add NAICS Codes to the list just like any other Add Record button in the system.





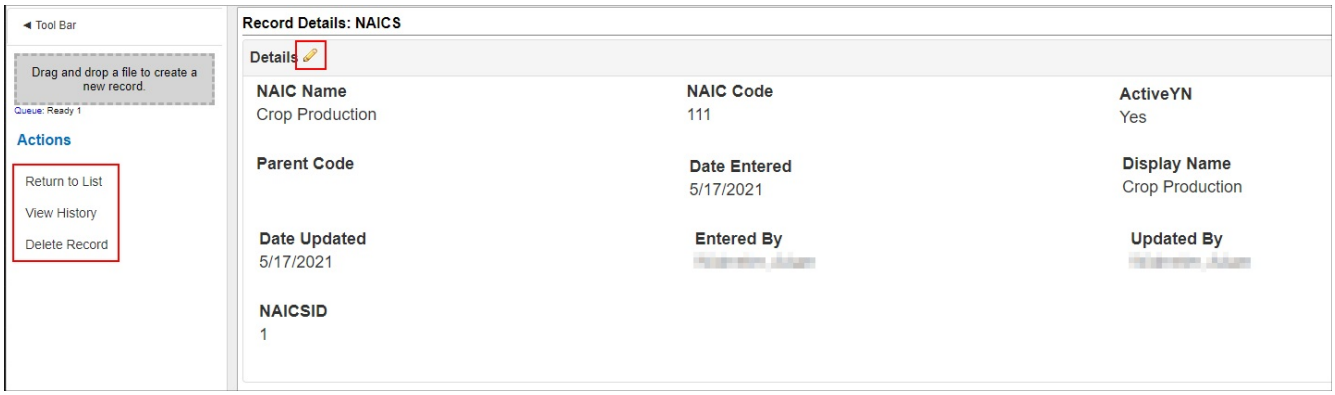
Note: If the NAICS Code **Is Active** field is set to **No**, it will not be available from the **NAICS** drop down on the Solicitation record. If the **Is Active** field is set to **Yes**, the code will be able available.

Once all the required fields and any other fields on the Add Screen are filled out, click **Save & Continue** save the Item.

View/Manage - By clicking this link, the user will be able to View and Manage the NAICS Codes.

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View/Manage



On the **Record Details: NAICS** screen, users can view the fields associated with the record. From this screen, a user may edit/manage any of the data in the specified fields by clicking the **Pencil** icon when you hover over the area to the right of each field. You can also edit multiple fields at one time by clicking on the **Pencil** icon to the right of the field group.

On the Side Menu under Actions:

Return to List: If clicked, the user will be taken to the **NAICS List** screen.

View History: **If clicked, it will take the user to the History Details & Audit Log** screen for this record.

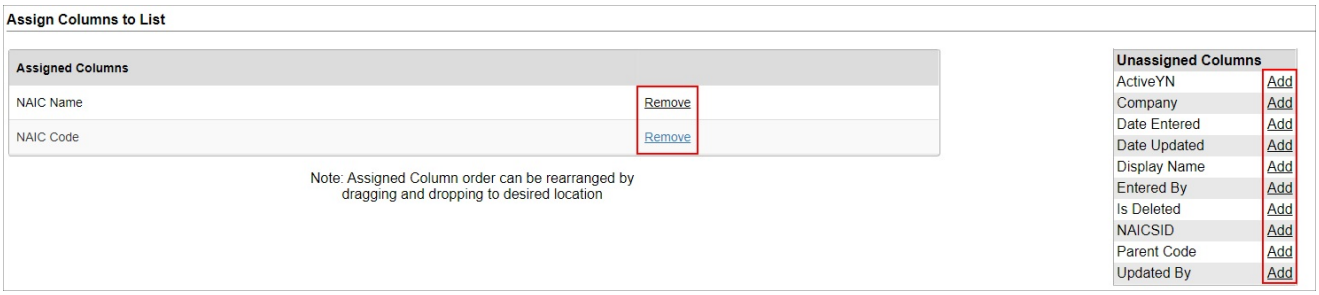
Delete Record: If clicked, the user will be prompted with: **"Are you sure you want to delete this record?"** If yes click **Yes, delete it** to delete the record.

Manage Columns - To customize the columns displayed on the **NAICS List** screen, click **Manage Columns** on the side menu.



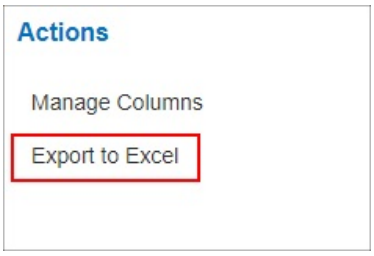
This will open the **Assign Columns to List** screen on which users can add fields to the **NAICS List** details screen.

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Once done assigning columns, click **Back to List** on the side menu.

Export to Excel – Clicking **Export to Excel**" will export the **Product Service Categories List** screen to an Excel file.



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Adding MRD Records In-Line

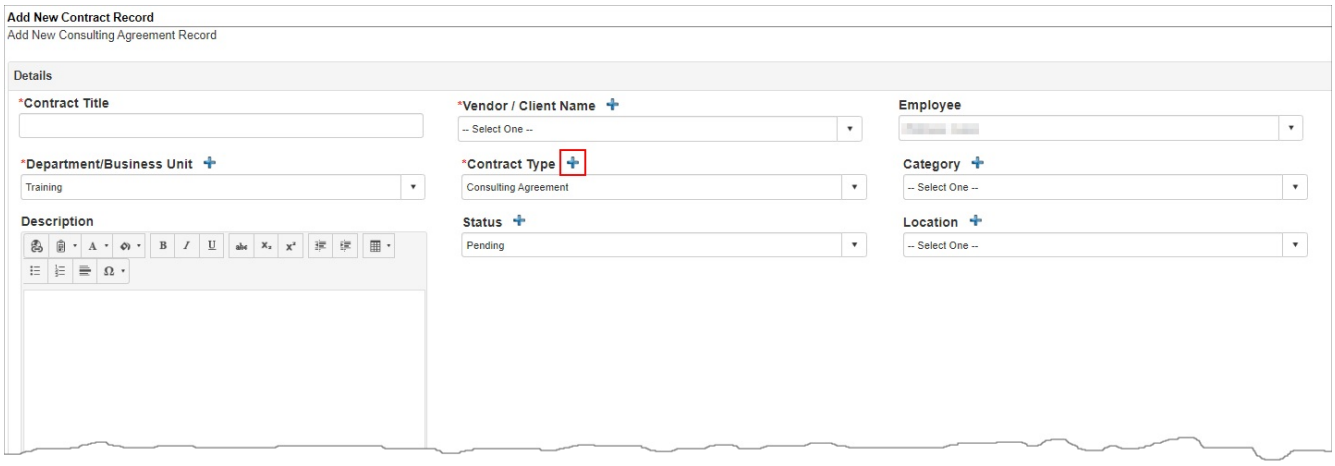
Adding MRD Records In-Line

Master Reference Data Management: Add MRD In-Line

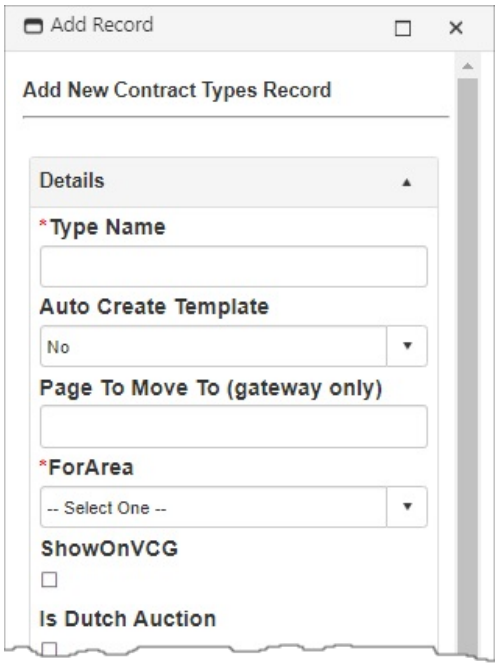
Users who have been granted the permissions to add master reference data can also add the data in-line when entering a new record such as a contract.

To Add a New Master Reference Table Value

1. On the add screen for the record in question, click the applicable blue + ( ) icon.

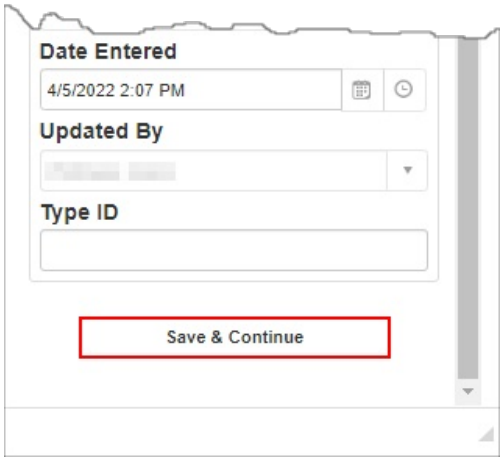


2. A pop-up add screen displays. Complete all required fields.



3. At the bottom of the pop-up, click **Save and Continue**.

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4. The pop-up window closes and the new newly created value is entered into the applicable field.

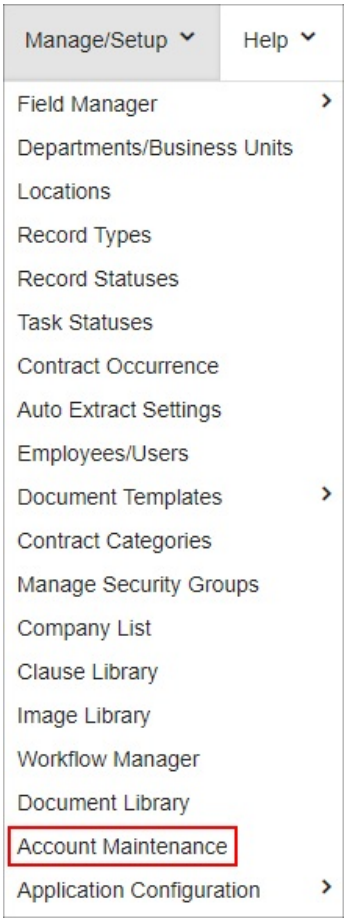
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Data Import Manager Overview

Data Import Manager Overview

Data Import Manager Overview

Contract Insight offers the ability to import data from a structured **CSV file**. CSV files contain structured data and can be opened with standard spreadsheet programs such as MS Excel. The importing/updating of data should be performed by your Cobblestone Contract Insight System Administrator. To navigate to the **Data Import Manager** screen, log into the application as a System Administrator and go to the **Manage/Setup** top menu item and click **Account Maintenance**.

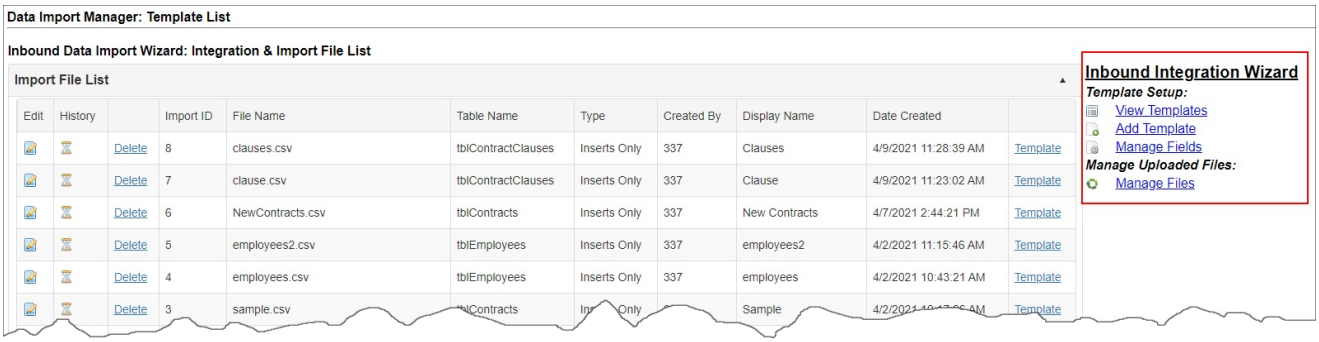


On the Account Maintenance screen, click **Data Import Manager** on the side menu.

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This will bring you to the **Inbound Integration Wizard: Integration & Import File List** page. On this page, users can view, add, and edit templates for the **Data Import Manager**.



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Create New Import/Update Template

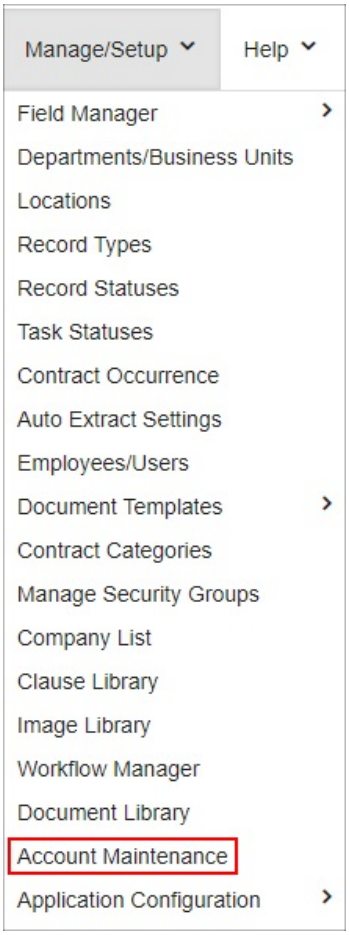
Create New Import/Update Template

Data Import Manager: Creating/ Updating Import Templates

Contract Insight offers the ability to import data from a structured CSV file. CSV files contain structured data and can be opened with standard spreadsheet programs such as MS Excel. Typically, the importing of data should be performed by your Cobblestone Contract Insight System Administrator.

Accessing the Data Import Manager

1. Log into the application as a System Administrator and, from the **Manage/Setup** top menu item, click **Account Maintenance**.

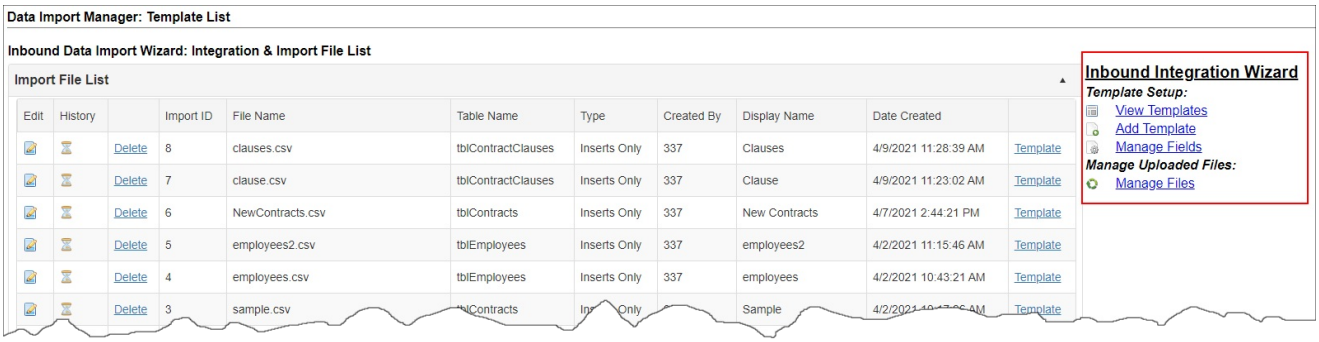


2. On the Account Maintenance screen click **Data Import Manager** on the side menu.

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3. The **Inbound Integration Wizard: Integration & Import File List** page displays on which a user can view, add, and edit templates for the Data Import Manager.



Add a new Import Template

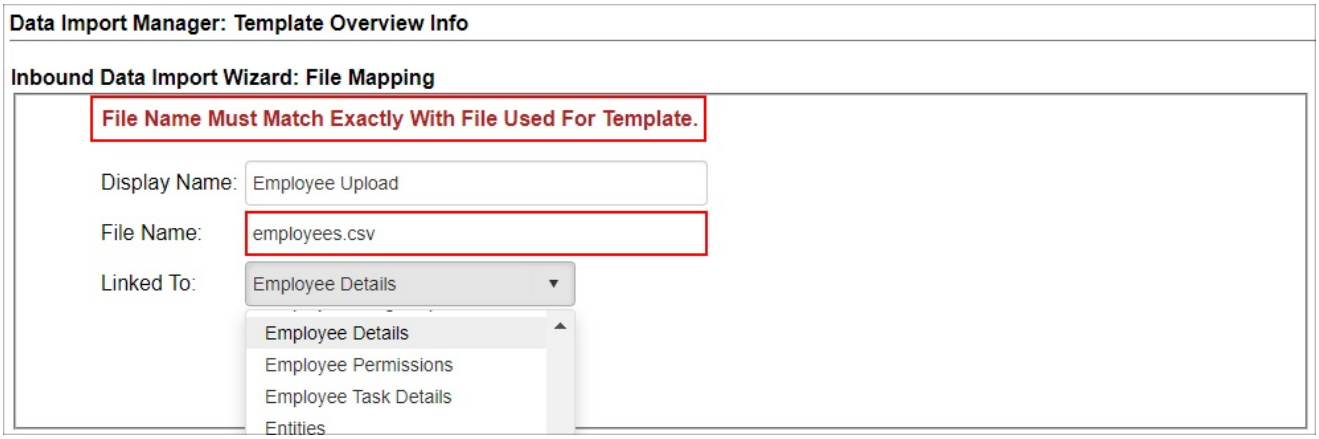
1. Click **Add Template** on the side menu.



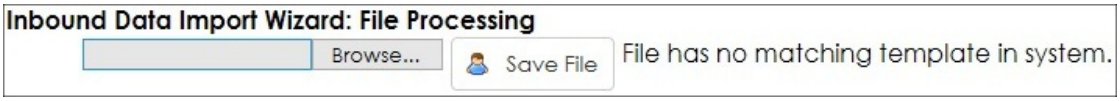
2. This will bring you to the **Inbound Data Import:File Mapping** page where you will give the template a **Display Name**, specify a **File Name**.

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Note: the **File Name** must include the file extension of .csv), and then select the **Linked To** area (the table) in the system for which the template will be used.



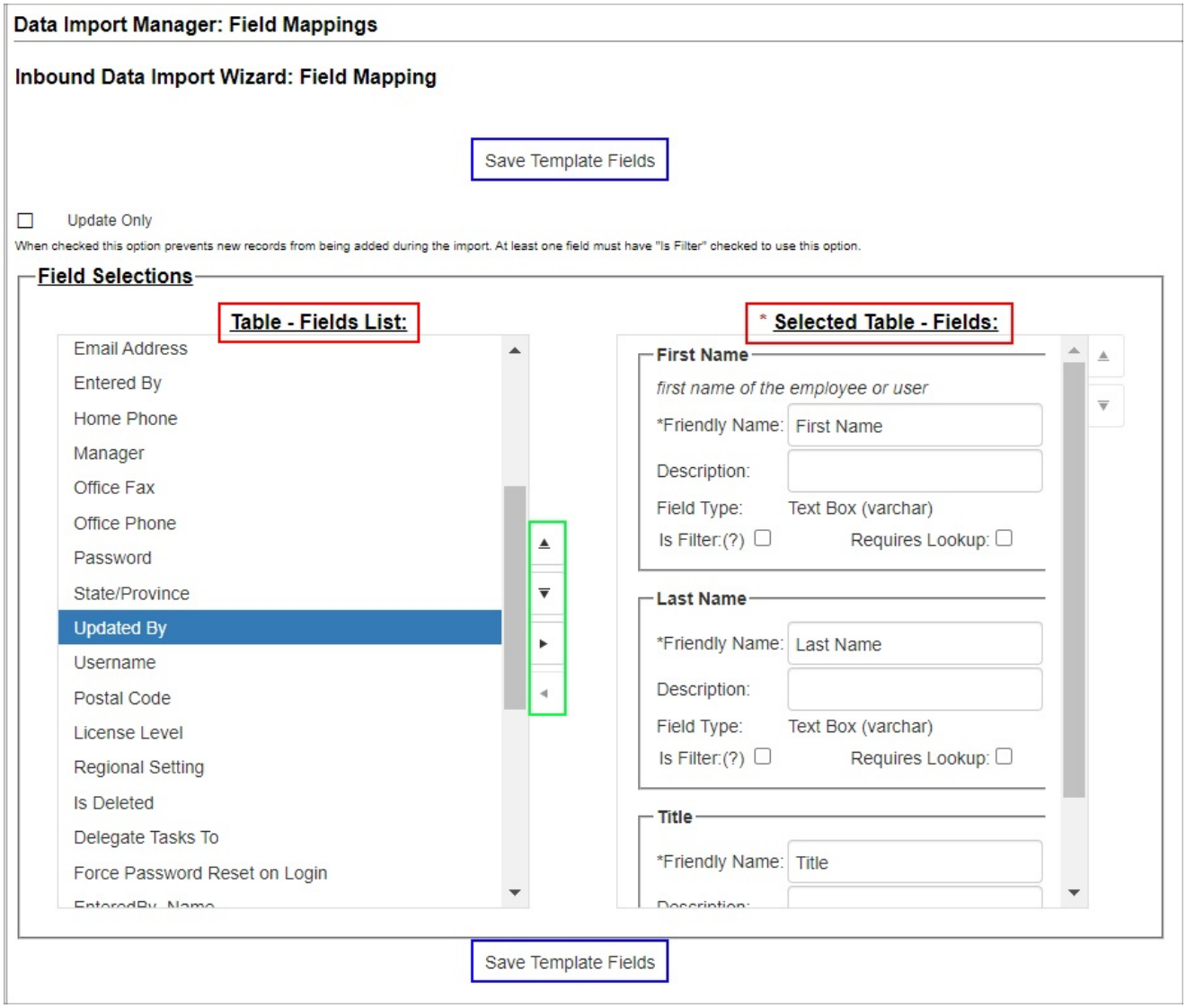
Note: The file name you enter must match exactly to the name of the file you wish to Import, including the file extension. Example: Employees.csv. The system will not upload any file that does not have a template with a matching file name (else the error shown below is displayed).



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3. Click **Save**. The **Inbound Integration Wizard: Field Mapping** page displays. select which fields (columns) to be be included in THE template.

4. A list of fields associated with the table/area selected in the **Linked To** drop down on the previous page displays. To select and add fields to the template, click the name of the field in the **Table- Field List** then click the **navigation arrow** in the center to move the field to the **Selected Table- Field** list. Alternatively, drag and drop the fields to select.

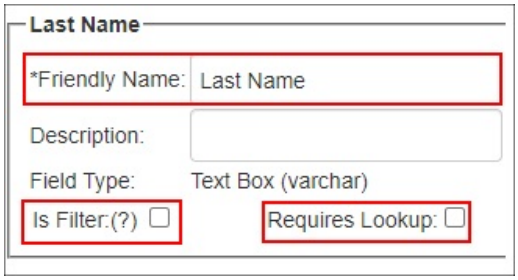


5. Once the field(s) to include in your template are selected, give each selected field a unique **Friendly Name**. The **Friendly Name** is the column name in your template (Excel spreadsheet).

Note: the field layout must match the same order of the spreadsheet.

Example: First Name must be the first column) and you may either drag and drop the fields into the correct order or you may select the field and then use the navigation arrow to move it up or down.

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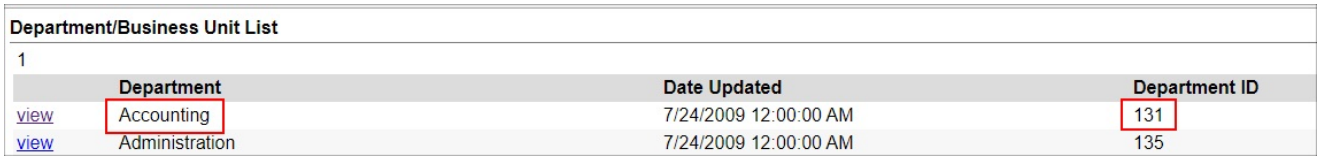


The **Is Filter:(?)** checkbox determines if the record is an insert or an update to an existing record. Select **Is Filter** for templates that will be updating and inserting.

Note: If the **Is Filter:(?)** box is checked, the record will update any existing record with a matching value in that field. If no matching value is found, the record will be inserted as a new record.

The **Requires Lookup** checkbox is referencing fields linked to Master Reference Data areas that store the **ID** of the value stored in that field's associated tab (Department, Locations, Contract Types, Employees, etc.).

Note: If **Requires Lookup** is checked for a field, make sure the text entered into the field in the spreadsheet matches exactly with the text you have in the system for that Master Reference Data area (see below). If **Requires Lookup** is not marked, use the **ID** in your spreadsheet for the import/update.



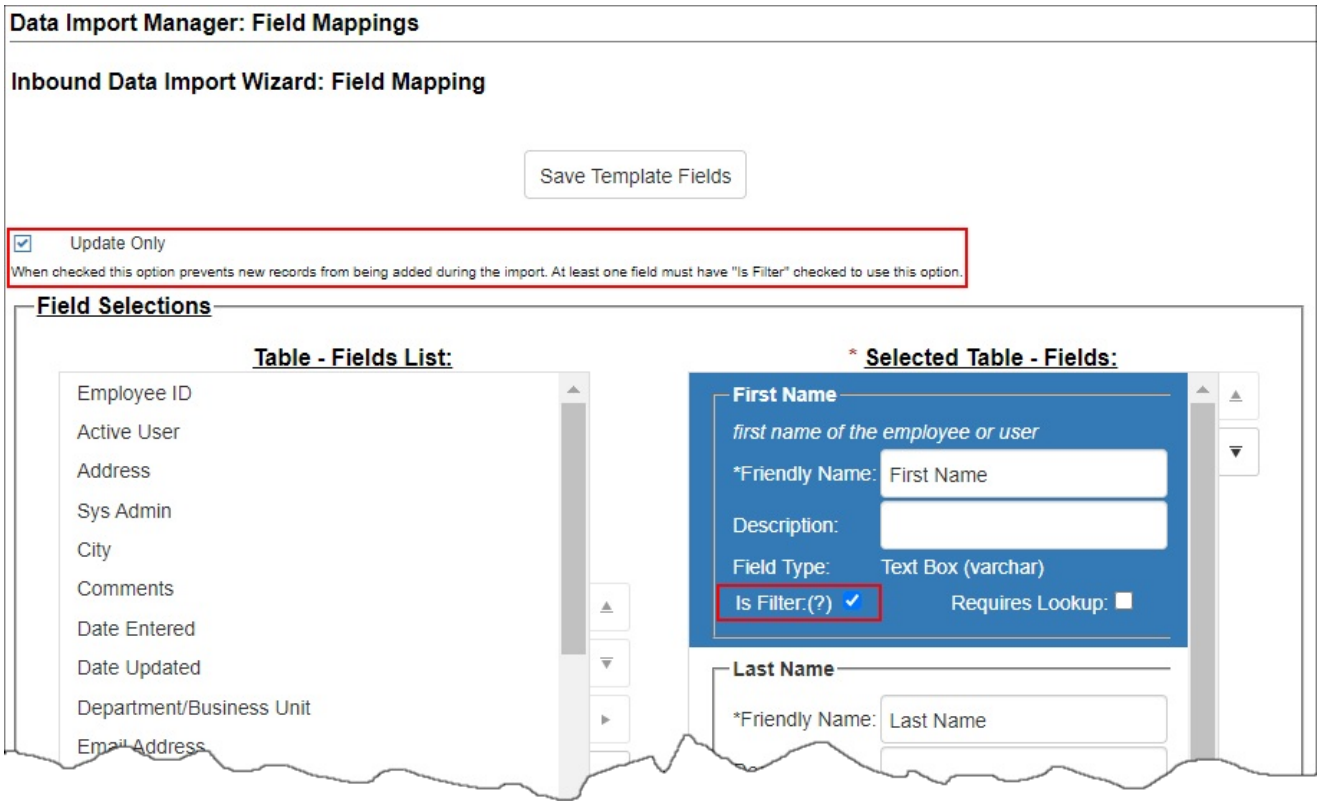
6. Once all fields are selected and each selected field has a unique **Friendly Name,** click **Save Template Fields**.

Note: For fields like **Active**, **Allow Login**, **System Admin**, and **Force Password Reset,** 1 = Yes and 0 = No. (This is not true for user defined fields. With User Defined Drop Down fields, Yes = Yes, Y = Y, No = No, N = N, etc.).

Update Only

To ensure a template is only updating existing records and not creating new ones, mark the **Update Only** tick-box.

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Note: At least one field must have the Is Filter: (?) box marked.

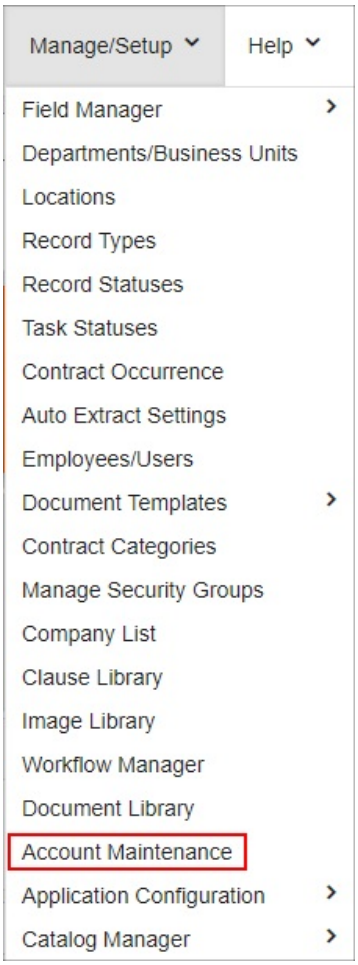
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Downloading and Populating Import/Update Templates

Downloading & Populating Import/Update Templates

Data Import Manager: Downloading & Populating Import/Update Templates

To navigate to the **Data Import Manager** screen to view and download your import/update templates, log into the application as a System Administrator and go to the **Manage/Setup** top menu item and click **Account Maintenance**.

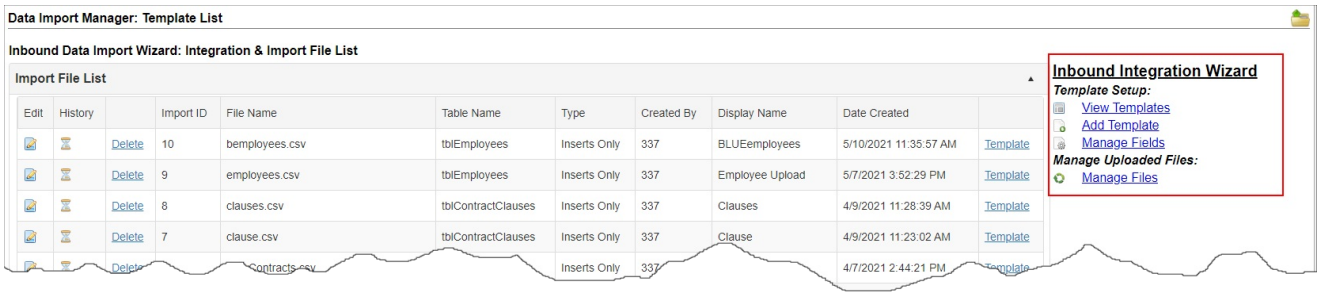


On the Account Maintenance screen click on the "Data Import Manager" link on the side menu.

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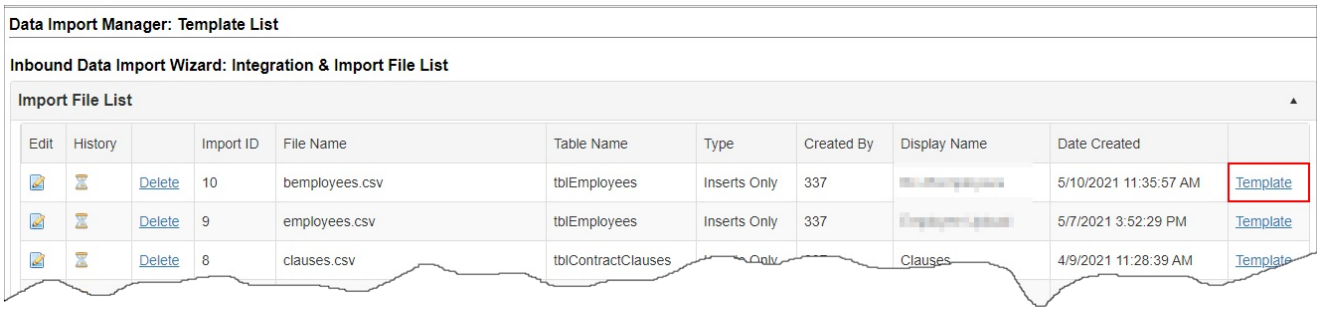


This will take you to the **Inbound Integration Wizard: Integration & Import File List** page where you are able to view, add, and edit templates for the Data Import Manager.

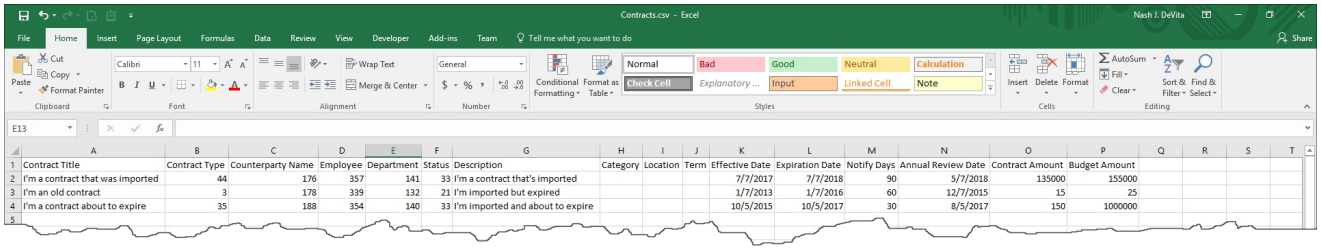


To download a copy of your new template to Excel, click **Template** on the right of the template you wish to download.

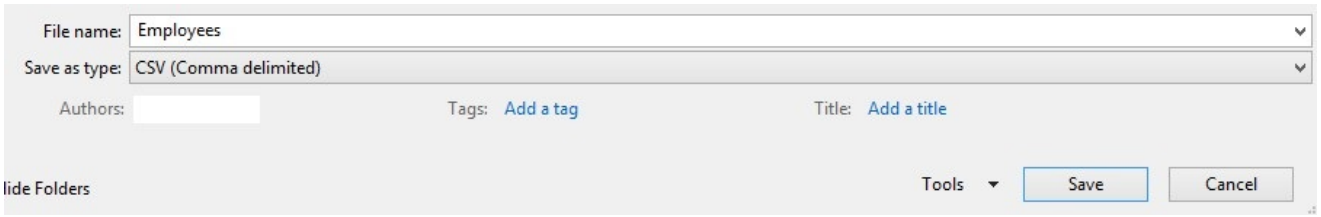
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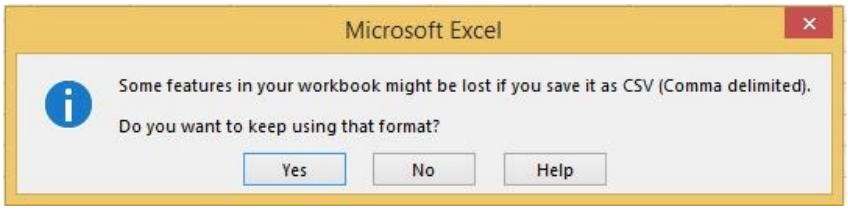
This will download the Excel spreadsheet you need to populate for your import. Once open, you will see a column for each field you selected. Be sure you do not change the names or order of the columns. They must match the order of the fields and **Friendly Names** as they are specified in Contract Insight for that template.



Populate your spreadsheet with the data you wish to import and be sure you save it with the identical **File Name** you specified when creating your template. In addition, be sure to save the file as a **CSV** (Comma Delimited) file type (so that the file will have the .csv file extension).



When asked if you want to proceed and keep using the CSV format, click **Yes**.



THINGS TO REMEMBER WHEN POPULATING YOUR SPREADSHEET:

The “Is Filter:(?)” checkbox determines if the record is an insert or an update to an existing record. You will only want to select the "Is Filter" for templates that will be updating and inserting.

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Please Note: If the **Is Filter:(?)** box is checked the record will update any existing record with a matching value in that field. If no matching value is found the record will be inserted as a new record.

The **Requires Lookup** checkbox is referencing fields linked to Master Reference Data areas that store the **ID** of the value stored in that field's associated tab (Department, Locations, Contract Types, Employees, etc.).

Please Note: If "Requires Lookup" is checked for a field you will need to make sure the text entered into the field in your spreadsheet matches exactly with the text you have in the system for that Master Reference Data area (see below). If you do not check "Requires Lookup" then you must use the **ID** in your spreadsheet for the import/update.

Department/Business Unit List

1

	Department	Date Updated	Department ID
view	Accounting	7/24/2009 12:00:00 AM	131
view	Administration	7/24/2009 12:00:00 AM	135

Note: For fields like Active, Allow Login, System Admin and Force Password Reset 1 = Yes and 0 = No. (This is not true for user defined fields. With User Defined Drop Down fields Yes = Yes, Y = Y, No = No, N = N, etc.)

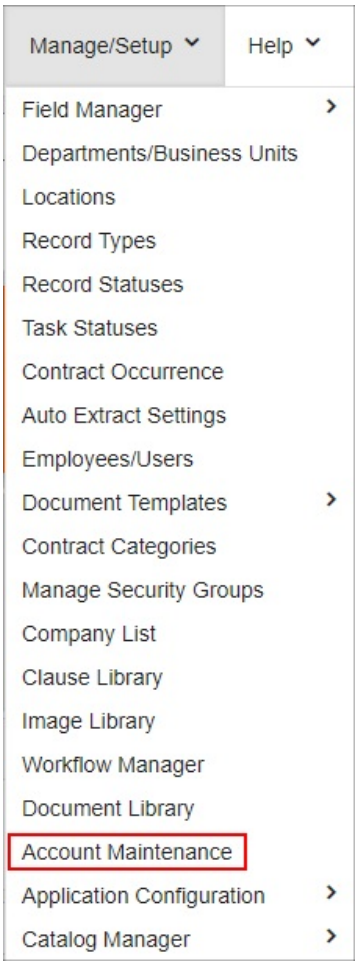
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Uploading and Processing Import/Update Templates

Uploading & Processing Import/Update Templates

Data Import Manager: Uploading & Processing Import/Update Templates

To navigate to the **Data Import Manager** screen to upload and process your import/update templates, log into the application as a System Administrator and go to the **Manage/Setup** top menu item and click **Account Maintenance**.

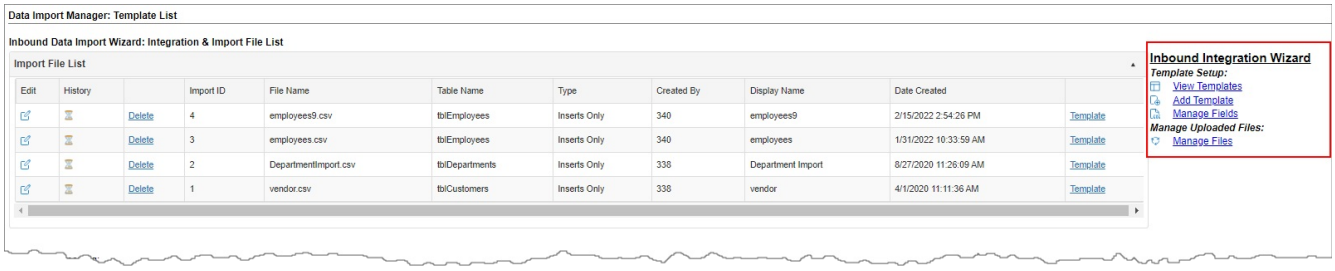


On the Account Maintenance screen, click **Data Import Manager** on the side menu.

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The **Inbound Integration Wizard: Integration & Import File List** page displays where users are able to view, add, and edit templates for the **Data Import Manager**.

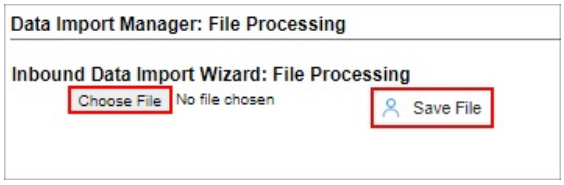


On the **Data Import Manager** screen, click **Manage Files** on the side menu.



The **Inbound Integration Wizard: Job Scheduler** screen displays where a user can upload files for the one off processing, view the summary, status, and history of import templates in the system.

Click **Choose File** and locate the file locally. After the file has been selected, click **Save**.

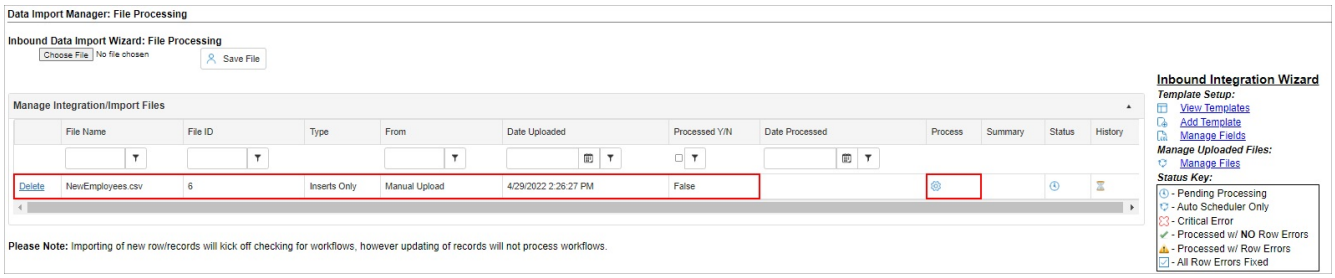


Once saved, the record is now available for processing.

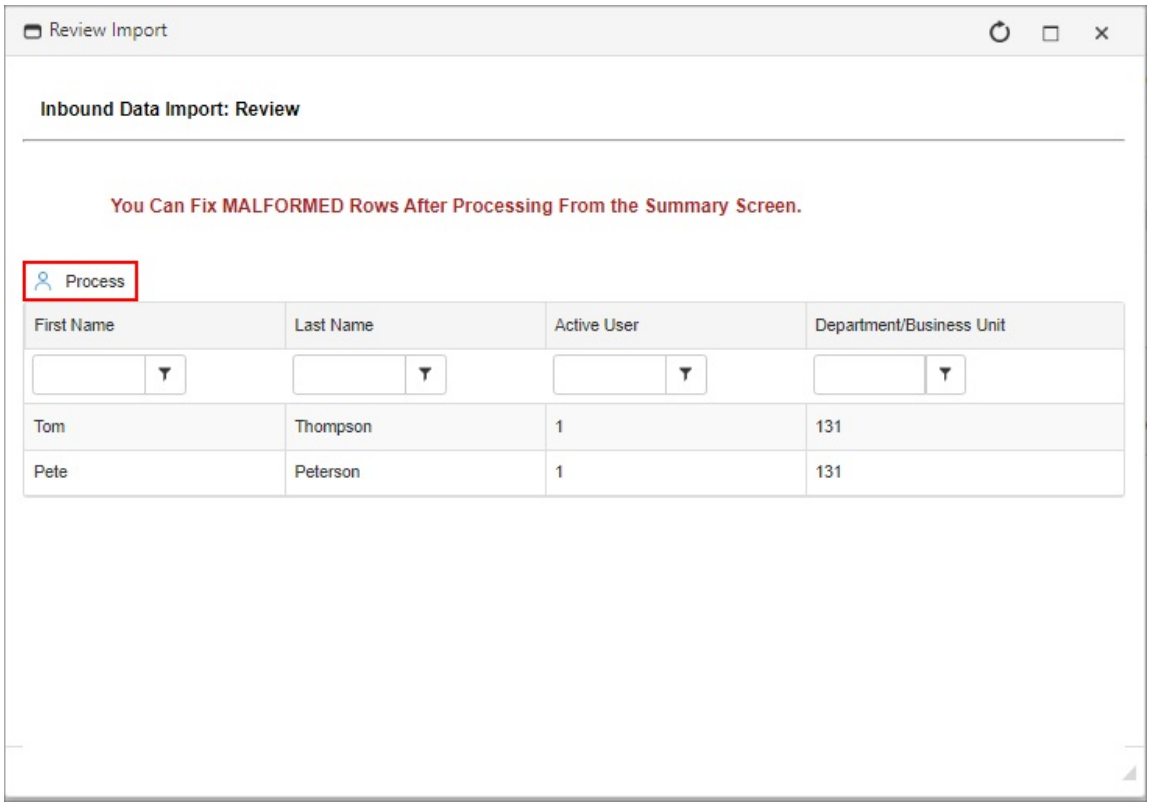
Note: In order to process the file as one off, the number of rows in the file must be fewer than 5000. If more than 5000, the file must be processed by the scheduler.

Once the file is uploaded, click the **Process Sprocket Icon**. A review screen displays.

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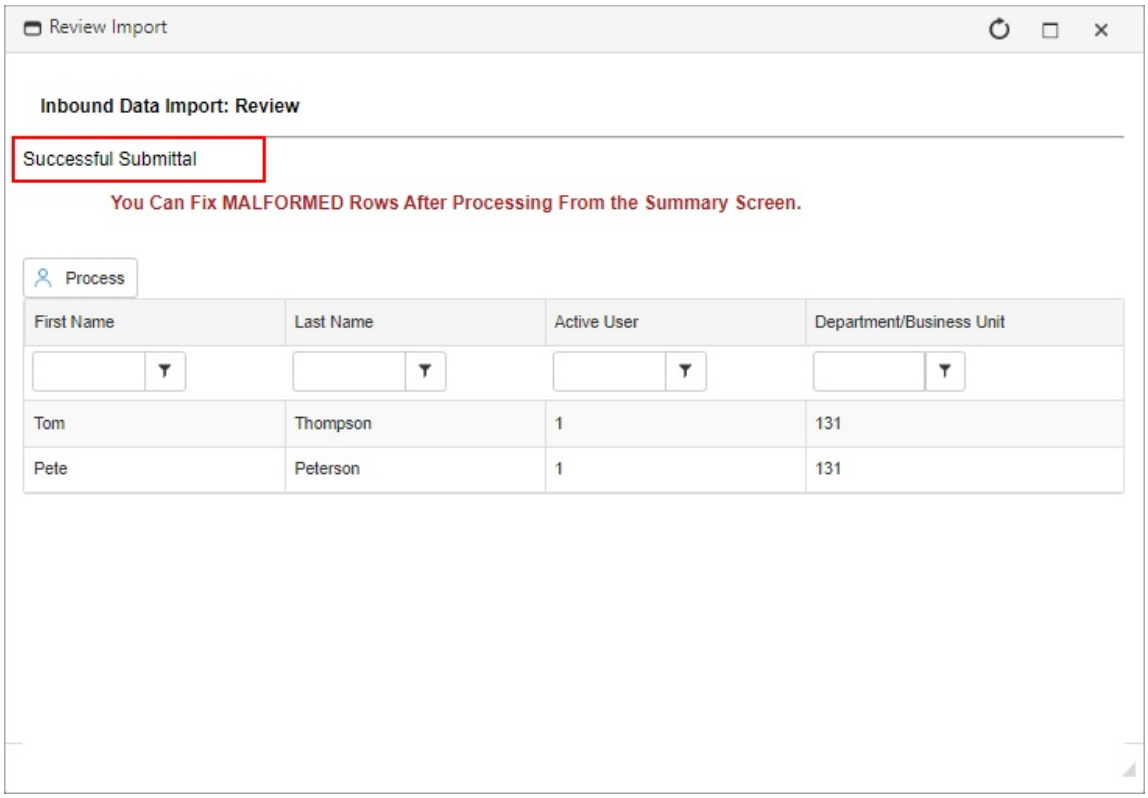


To process the file, click **Process** at the top of the list. Click **Process** only once. Once the rows have been imported, a review of the records displays.



If there are records that did not import, a message describing the issue displays.

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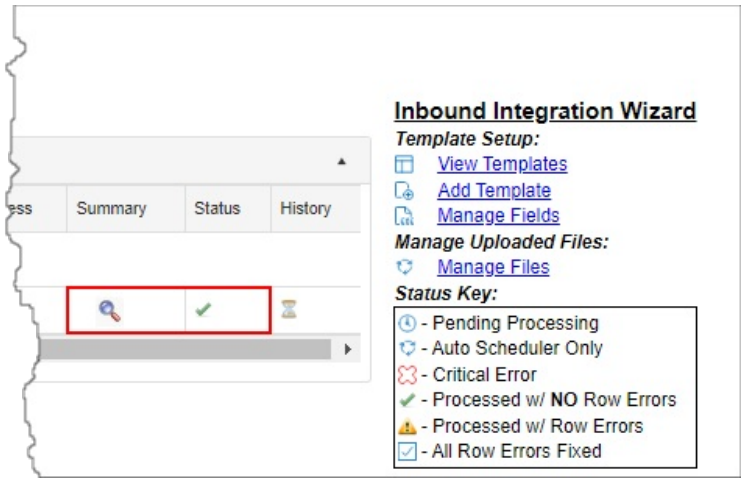


The **Status Key** displays on the side.

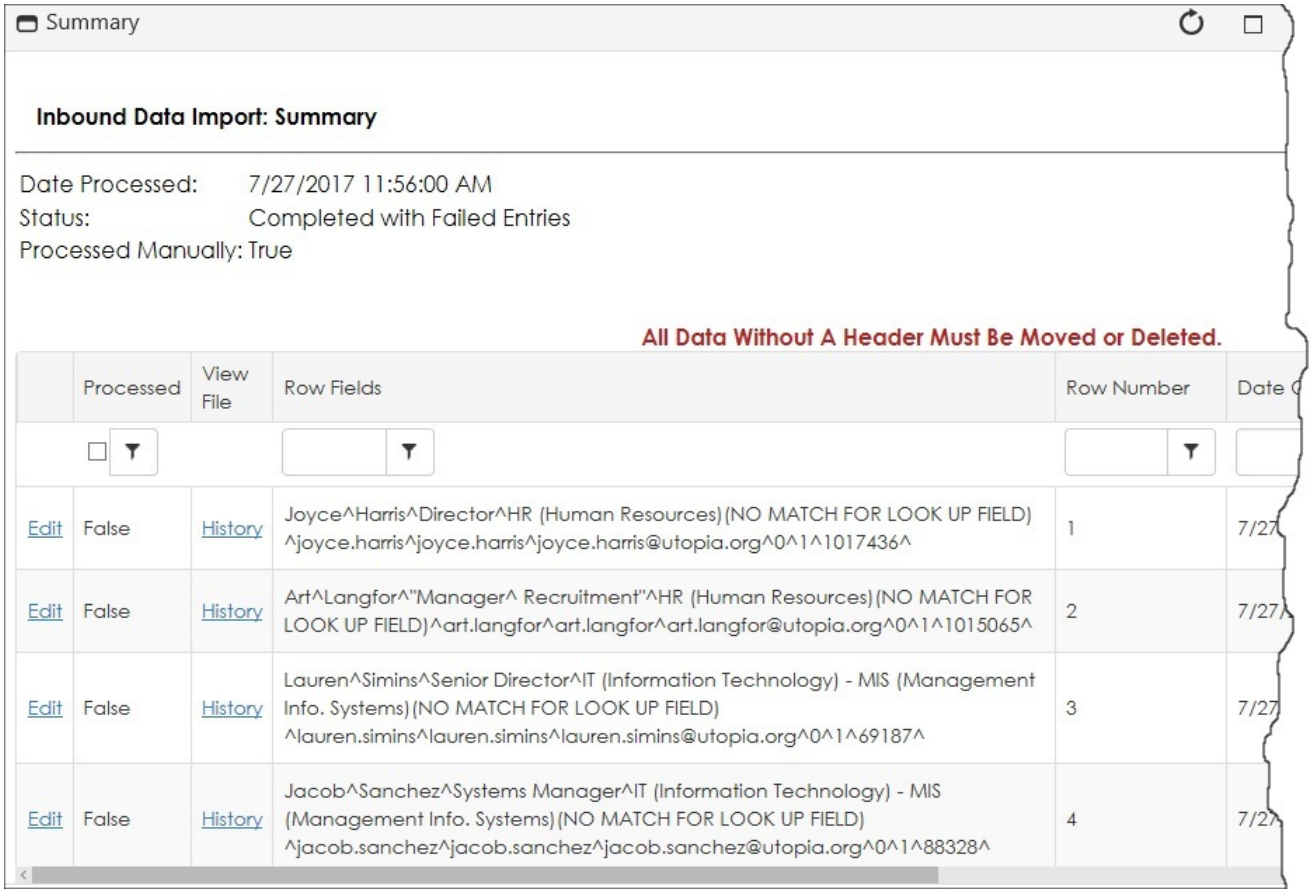
When the import was successful, a **Green Check Mark Icon** ( ) displays under the status column. If the import was processed with errors you will see the **Yellow Exclamation Mark Icon** ( ) displays under the status column.

If the status does not contain a **Green Check Mark Icon**, there were issues processing the import. Make the necessary changes to the excel spreadsheet and start the process again.

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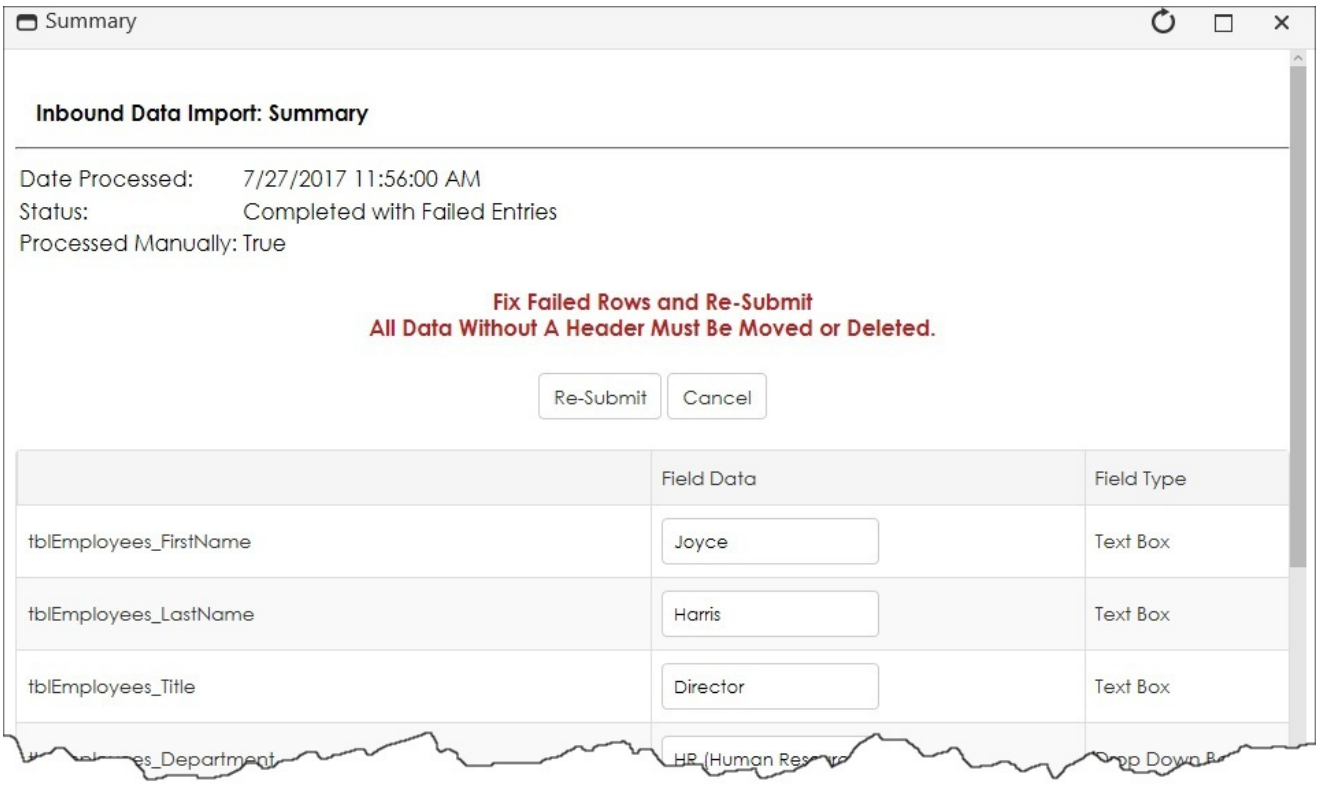


Clicking the **Summary Magnifying Glass Icon** ( ) opens the **Inbound Data Import: Summary** screen on which the status of all the imported records, including records that failed to import, displays.



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Resubmit any record that failed to import successfully by clicking **Edit**. The **Edit Screen** displays.



On the left is a breakdown of the fields mapped for the template. in the center is a breakdown of the actual data that was attempted in the import. On the right is the data type for the fields. You can manually fix any error by selecting the text box in the center and inserting the proper data. After all the corrections for the record have been made, click **Re-Submit**.

Once information has been successfully imported, please check the area into which the data was imported to ensure the information is present.

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Mass Transfer Contracts From/To Employees

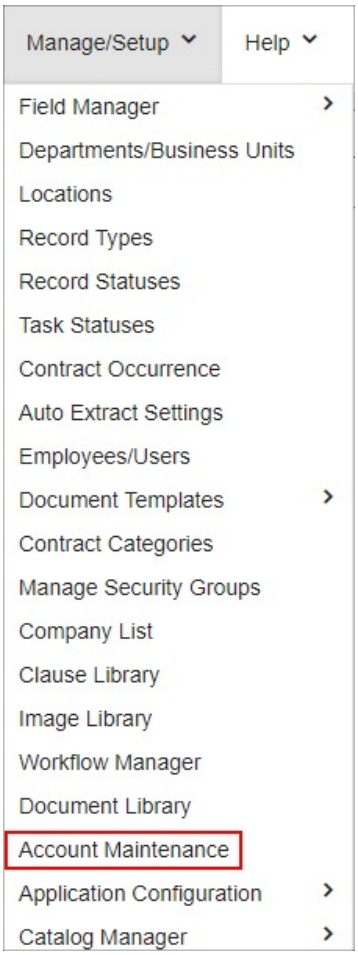
Mass Transfer Contracts From/To Employees

Mass Transfer of Employee Assigned to Contracts

Contract Insight supports the ability to mass transfer contracts from one employee to another employee.

To start transferring contracts:

1. Log in as an application administrator.
2. From the **Manage/Setup** top navigation menu item, select **Account Maintenance**.



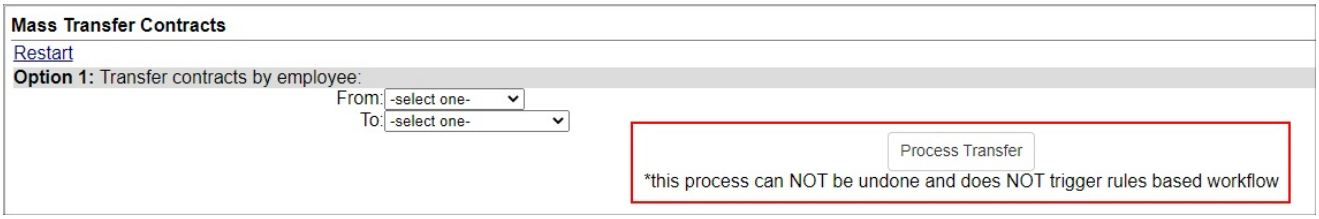
3. Click **Transfer Contracts** on the side menu.

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Option 1: Transfer Contracts by Employee

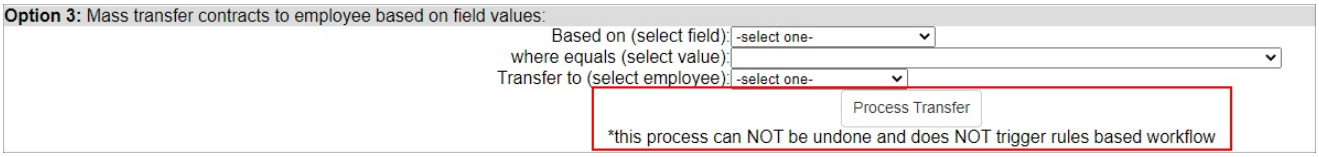
1. Using the **From** drop down menu, select the employee from whom you would like to transfer the contracts.
2. Using the **To** drop down menu, select the employee to whom you would like to transfer the contracts.
3. Click **Process Transfer** .



Please NOTE: this process CANNOT be undone or reversed.

Option 3: Mass transfer contracts to employee based on field values

01. Using the **Based On** drop down menu, select the desired field name.
02. Using the "Where Equals" drop down, select the value of the field selected in the previous step. The value will determine which contracts are to be transferred.
03. Using the **Transfer To** drop down menu, select the employee to whom the contracts will be transferred.
04. Click **Process Transfer**.



Please NOTE: this process CANNOT be undone or reversed.

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Mass Update Contract Field Values

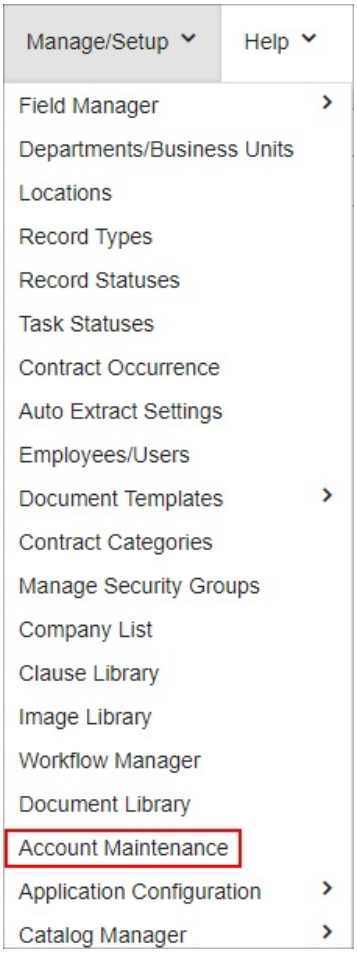
Mass Update Contract Field Values

Mass Update Contract Field Values

Contract Insight supports the ability to mass update contract field values.

To get started with transferring contracts:

1. Log in as an application administrator.
2. From the **Manage/Setup** top navigation menu item, select **Account Maintenance**.



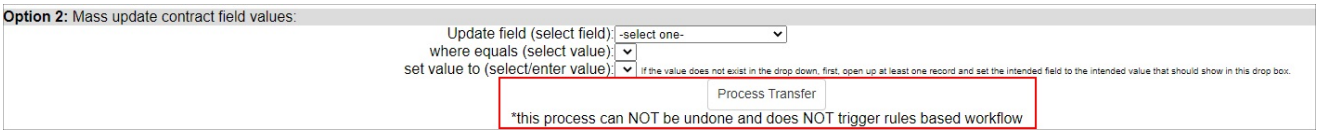
3. Click **Transfer Contracts** on the side menu.



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Option 2: Mass Update Contract Field Values

1. Using the **Update Field** drop-down menu, select the field for which data is to be updated.
2. Using the **Where Equals** drop-down menu, select the value from which the update is to be made.
3. Using the **Set Value To** drop-down menu, select the desired new value for the field selected (in step 1).
4. Click **Process Transfer**.



Please NOTE: this process CANNOT be undone or reversed.

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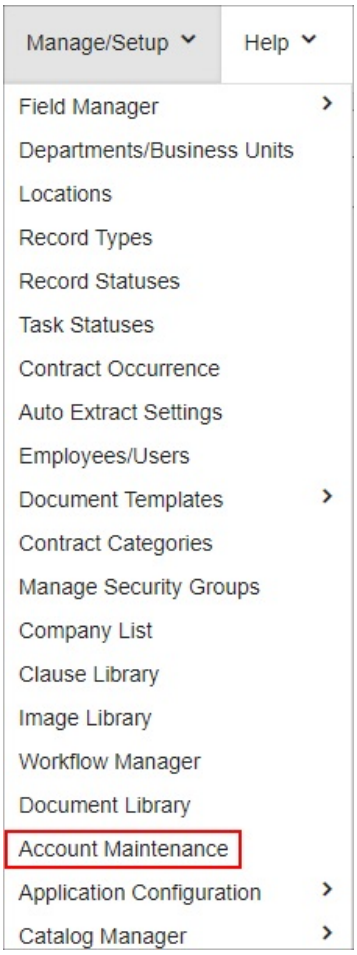
Mass Transfer Contract Tasks

Mass Transfer Contract Tasks

Mass Transfer Contract Tasks by Employee

Contract Insight supports the ability to mass transfer contract tasks from one employee to another based on employee.

1. Log in as an application administrator.
2. From the **Manage/Setup** top navigation menu item, select **Account Maintenance**.



3. Click **Transfer Tasks** on the side menu.



Transfer Contract Tasks by Employee

1. Using the **From** drop down menu, select the employee from whom you would like to transfer tasks.

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2. Using the **TO** drop down menu, select the employee to whom you would like to transfer tasks.

3. Verify that the correct employees have been selected.

4. Click **Process Transfer**.



Please NOTE: this process CANNOT be undone or reversed.

Transfer Contract Tasks Based on Field Value

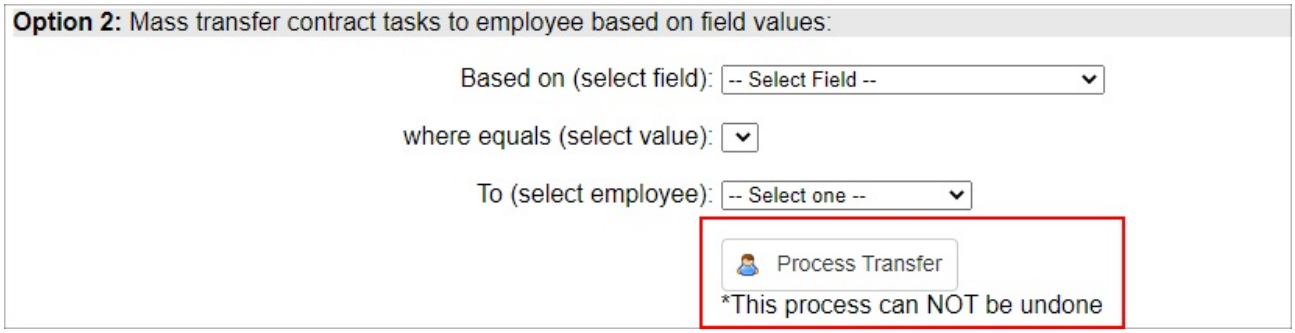
1. Using the **Based on** drop down menu, select the field name that you would like to transfer tasks.

2. Using the **where equals** drop down menu, select the field value that you would like to transfer tasks.

3. Using the **TO** drop down menu, select the employee to whom you would like to transfer tasks.

4.Verify that the correct field name, field value, and employee have been selected.

5. Click **Process Transfer**.



Please NOTE: this process CANNOT be undone or reversed.

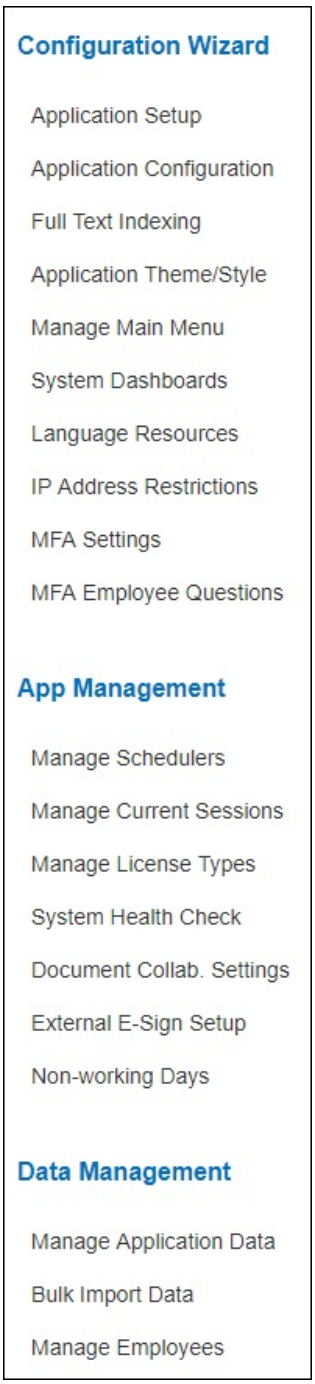
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AppConfig Wizard

AppConfig Wizard

AppConfig: Wizard Overview

The **Application Configuration** for Contract Insight is the initial area of setup for administrators. Also known as **AppConfig**, this section allows for complete control over the configuration aspects of Contract Insight. To assist in navigating through the different aspects of configuration, **AppConfig** has a built-in wizard to guide administrators through successful configuration of the Contract Insight Application.



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Let's take a quick overview of what is managed within each of the pages in this wizard.

Configuration Wizard

Application Setup

This configuration page handles the primary AppConfig settings including the Contract Insight License Key, Session Timeout and API Authentication Code.

Application Configuration

This configuration page manages many of the areas of configuration throughout the Contract Insight Application including Emails, Passwords, and Security.

Full Text Indexing

This configuration page handles all interaction(s) with Contract Insight's Full Text Indexing of documents/attachments to Contracts, Employees, and Vendors/Customers.

Manage Application Data

This configuration page provides a complete overview of application readiness and stored data for all the main areas of management within the Contract Insight Application.

Manage Main Menu

This configuration page allows Application Administrators to customize the top navigation menu of their Contract Insight Application as well as optionally customize with icons.

Configuration Management

Manage Current Sessions Full tracking and management of all active sessions with ability to purge/remove employee sessions if needed.

***Manage License Types**

Overview and breakdown of employees assigned to each of the license types (Admin, Super, Standard and Read Only).

Note: This is only available for Enhanced/New Licenses. For detailed information on the differences between Legacy and Enhanced licenses, please contact CobbleStone Systems.

Data Management

Bulk Import Data

Full bulk-importing capabilities for all key/major areas of the Contract Insight application.

Manage Employees

Redirects to the Contract Insight Employee list for detailed management.

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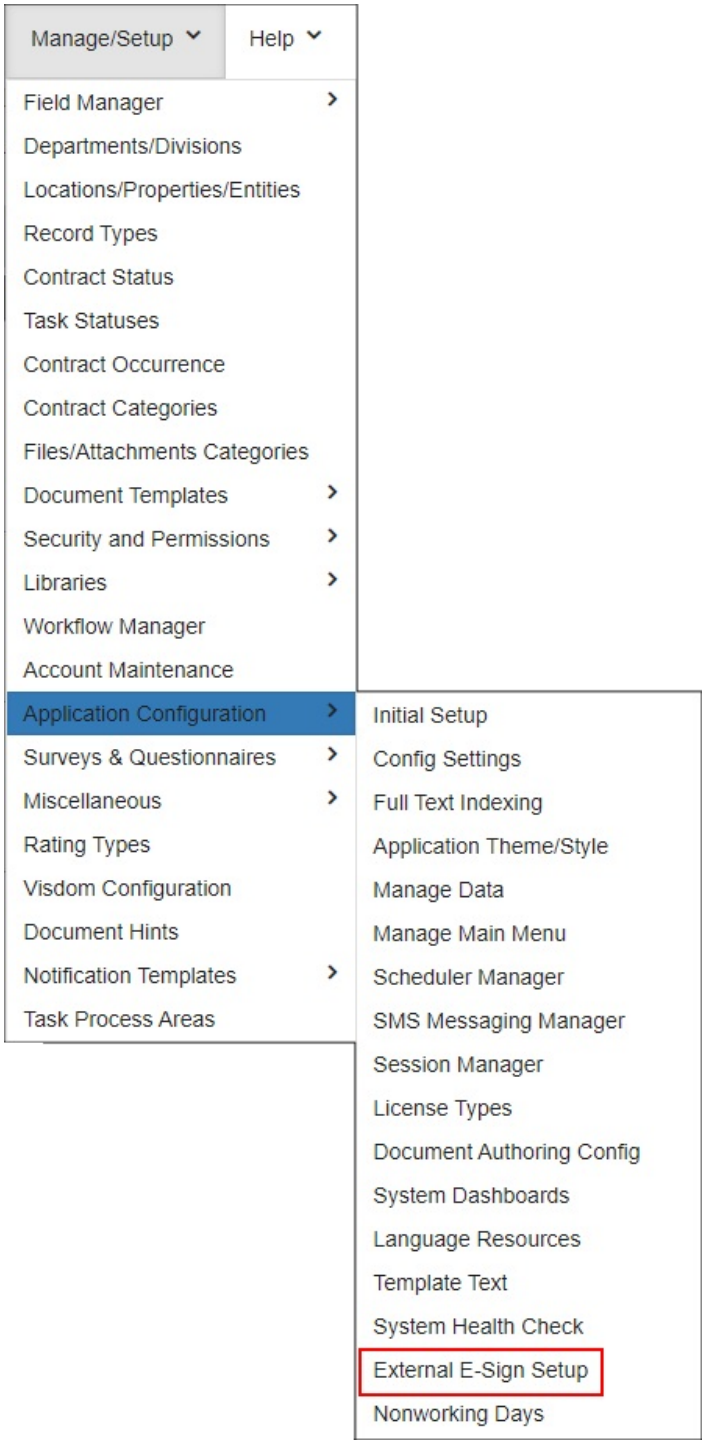
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External E-Sign Setup

External E-Sign Setup

AppConfig: External E-Sign Setup

If the **DocuSign Integration** module has been licensed, use the **External E-Sign Setup** page to set it up. To reach it, navigate to **Manage/Setup** > **Application Configuration** > **External E-Sign Setup**.



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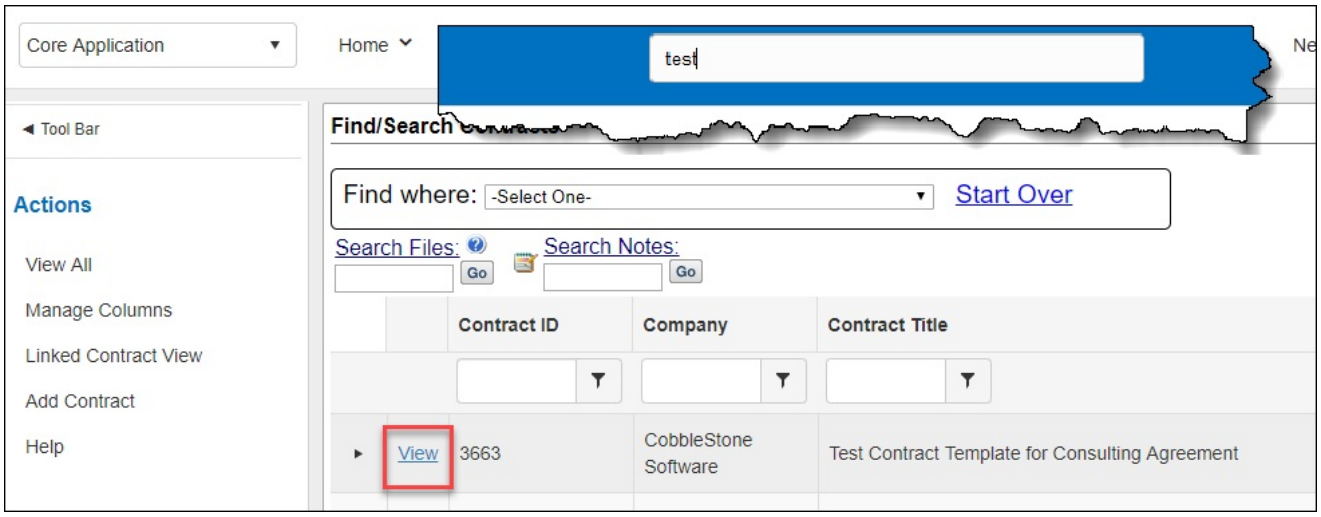
Click **Edit Login** on the **DocuSign Connection Settings** module to enter the credentials and GUID for the DocuSign Admin's account. The credentials and GUID entered here must to be for a DocuSign Admin; otherwise, the integration will not work. Select or enter the appropriate URL, and choose whether or not to allow **Send On Behalf Of**.

Click **Edit Settings** on the **Contract Insight Processing Settings** module to adjust the **Import Timer**, as well as the **Email Subject** and **Body texts**.

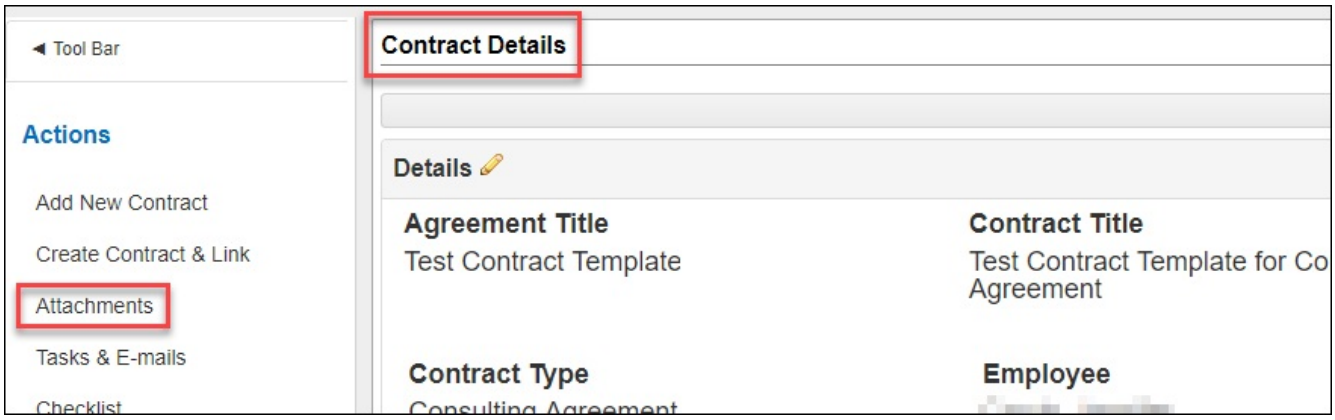
The **DocuSign Logged In User Account Settings** and the **DocuSign Users in this Account** areas populate automatically and cannot be adjusted through the User Interface. If there are no Users in the **DocuSign Users in this Account** section, there was an issue with the **DocuSign Admin credentials** previously entered.

Testing DocuSign in Contract Insight

1. Log in to Contract Insight as user with permissions to Add, Edit and View Contract Records.
2. In the top menu bar, use the **Quick Search** to search for the word test (or, if there is data in the system, another contract name you are familiar with).



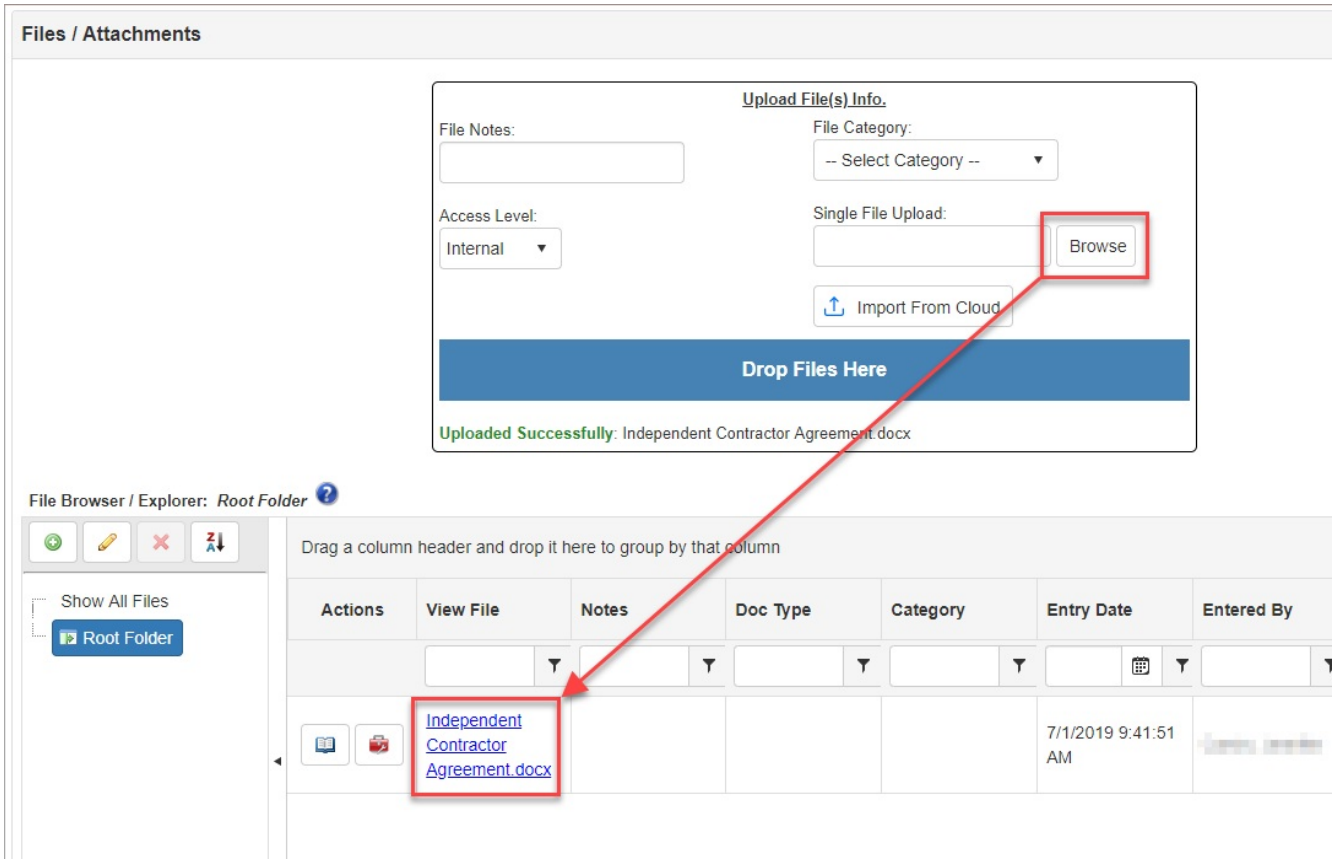
3. Once the search results populate, select **View** to view an existing Contract Record Details page.



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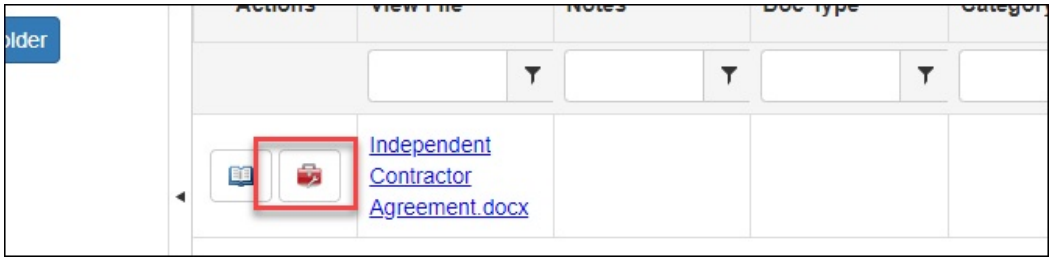
4. From the Contract Details page, select Attachments in the side menu.

5. At the top of the Files/Attachments section, click the Browse button and select a PDF or Word file to upload for signature from the pop up file browser.



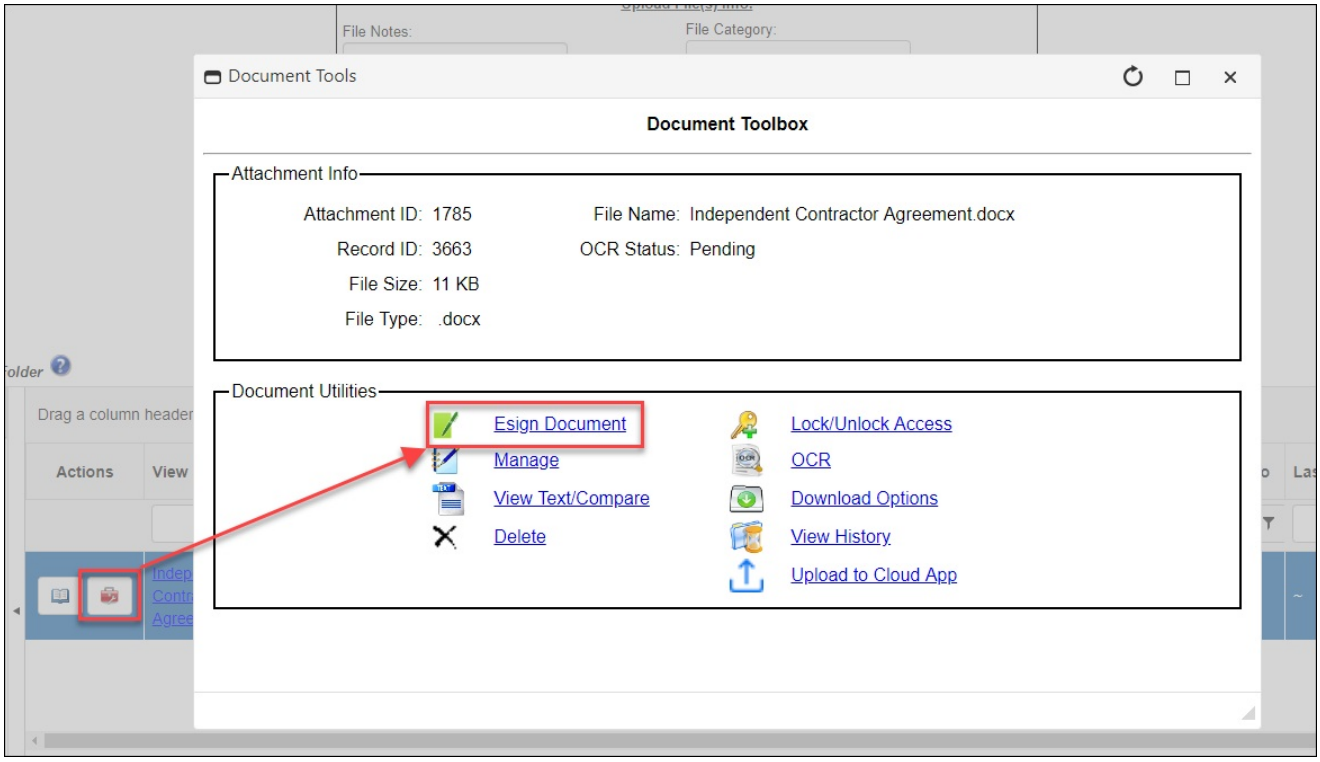
6. After the file is uploaded it will display in the files section (as seen above).

7. Click the red **toolbox** icon next to the file to be signed via DocuSign.



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8. The option **EsignDocument** is available in the Document Toolbox pop-up window.



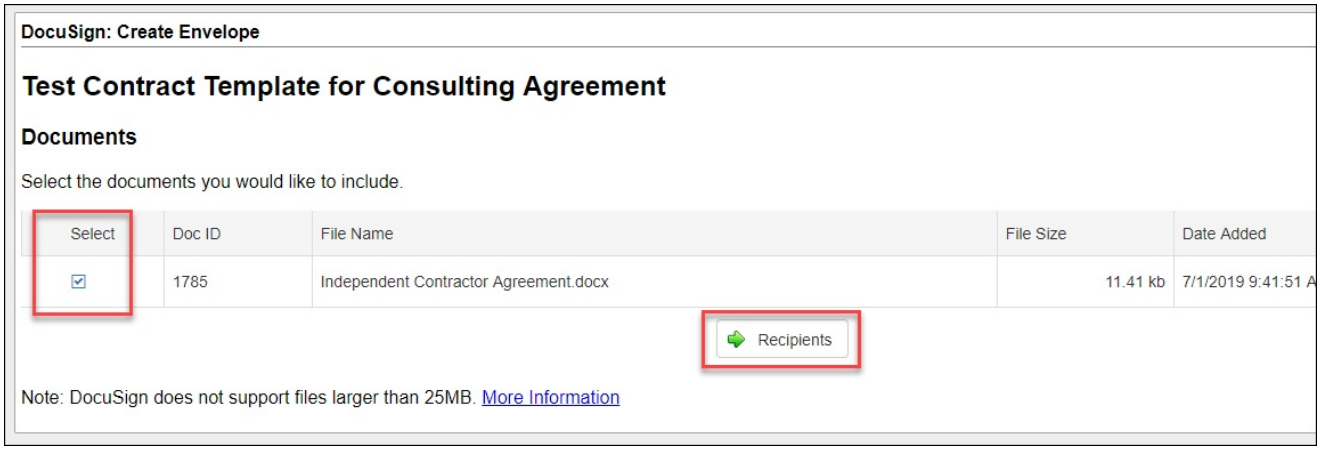
9. Click **the DocuSign image button** to proceed.



Note: An option for Adobe Sign [if licensed] and/or DocuSign [if licensed] or CobbleStone IntelliSign [if licensed] shows here.

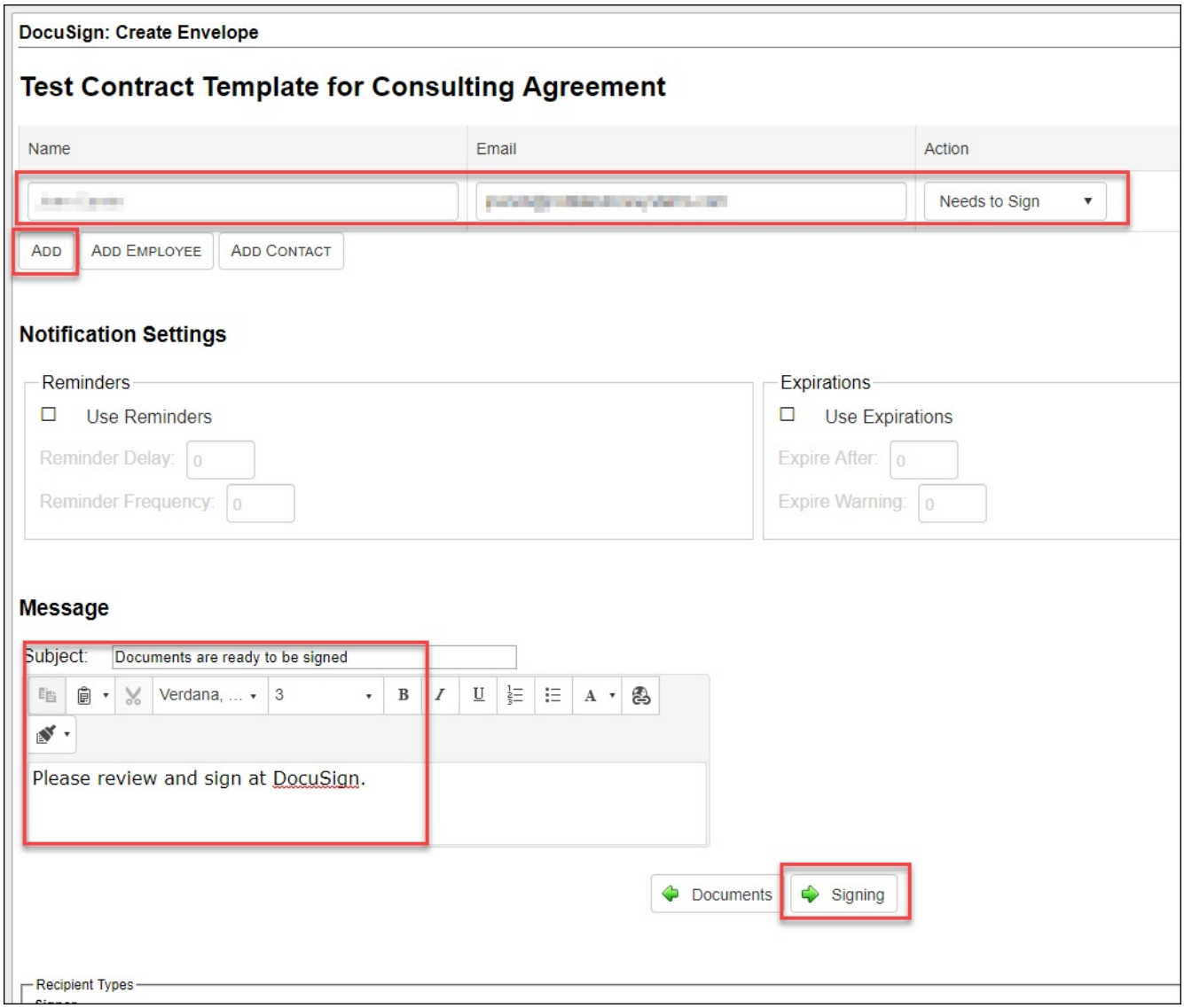
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10. Next, a pop-up window on which the option to select from among all files associated with the record displays. **Select a file** to be sent to DocuSign for signature then click the **Recipients** button to continue.



1. On the **DocuSign: Create Envelope** page, enter in the Signer/Recipient **Name**, **Email**, select an **Action** from the dropdown, then click the **ADD** button. Repeat for each person to be included in the DocuSign process.
2. Update the optional **Notification Settings** if needed.
3. Review and update the **Message Settings**.
4. When complete, click on the **Signing** button.

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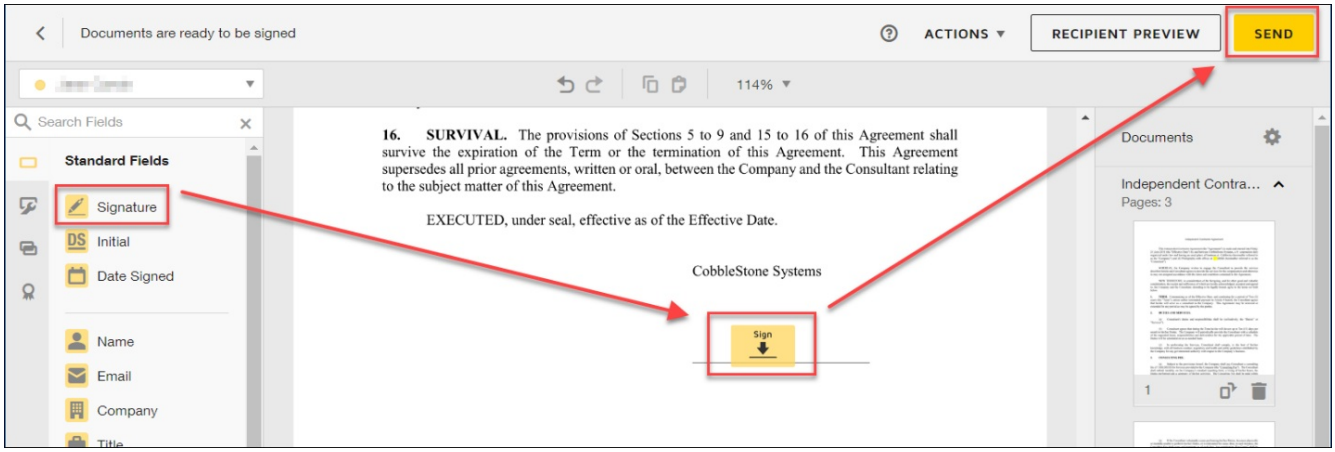


5. In the pop-up screen, click **OK** to be taken to the DocuSign website to finish the process.

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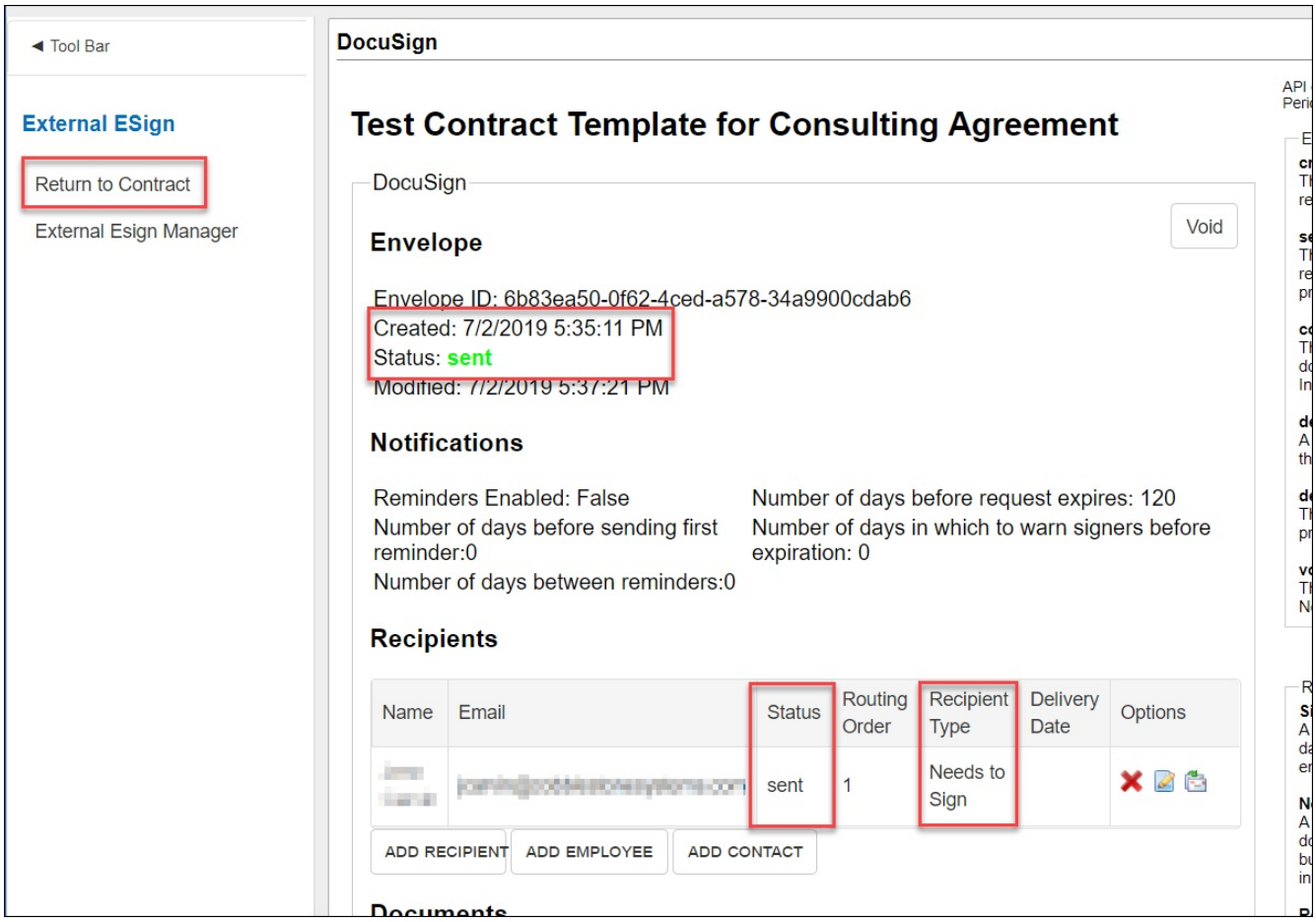


1. **[Outside of Cobblestone Software]** On the DocuSign screen, set **Signature** placeholders [optional] and then select the **Send** button for DocuSign to route the signing process.

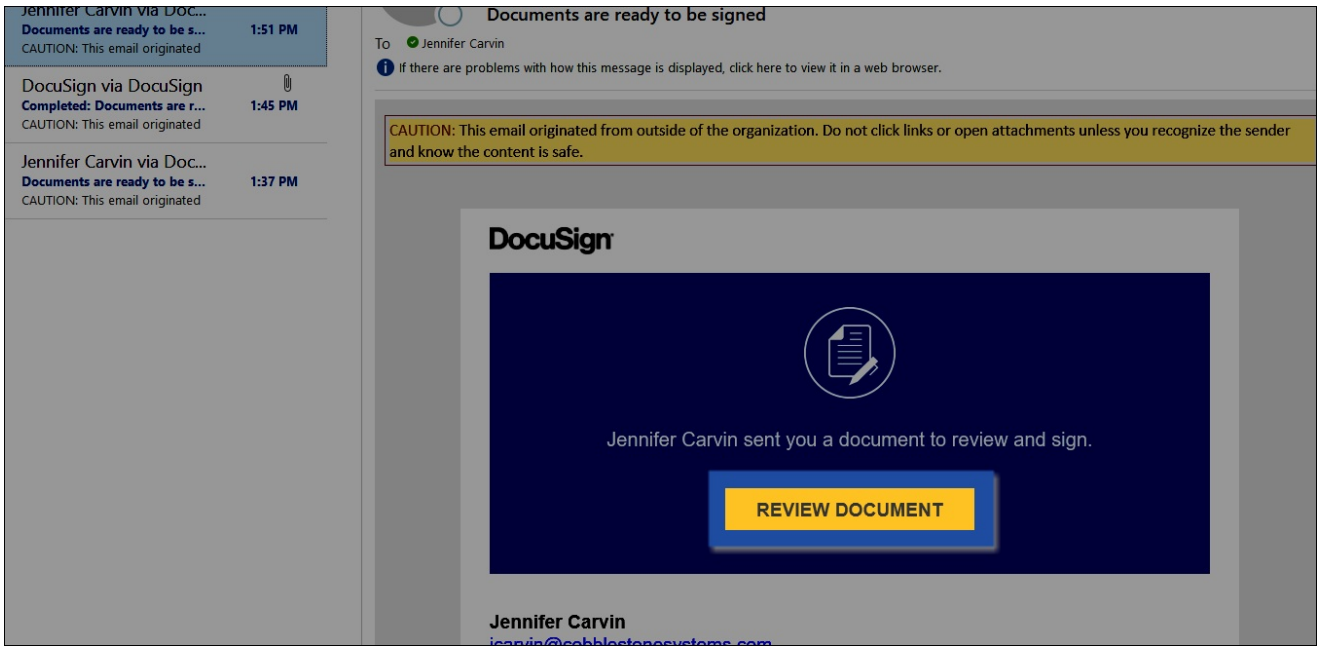


2. The screen will automatically refresh and return to the DocuSign **Envelope** page within Contract Insight. This page shows the status of the Envelope that was sent and the status of the signature process. Select **Return to Contract** in the side menu to be taken back to the Contract Details Record.

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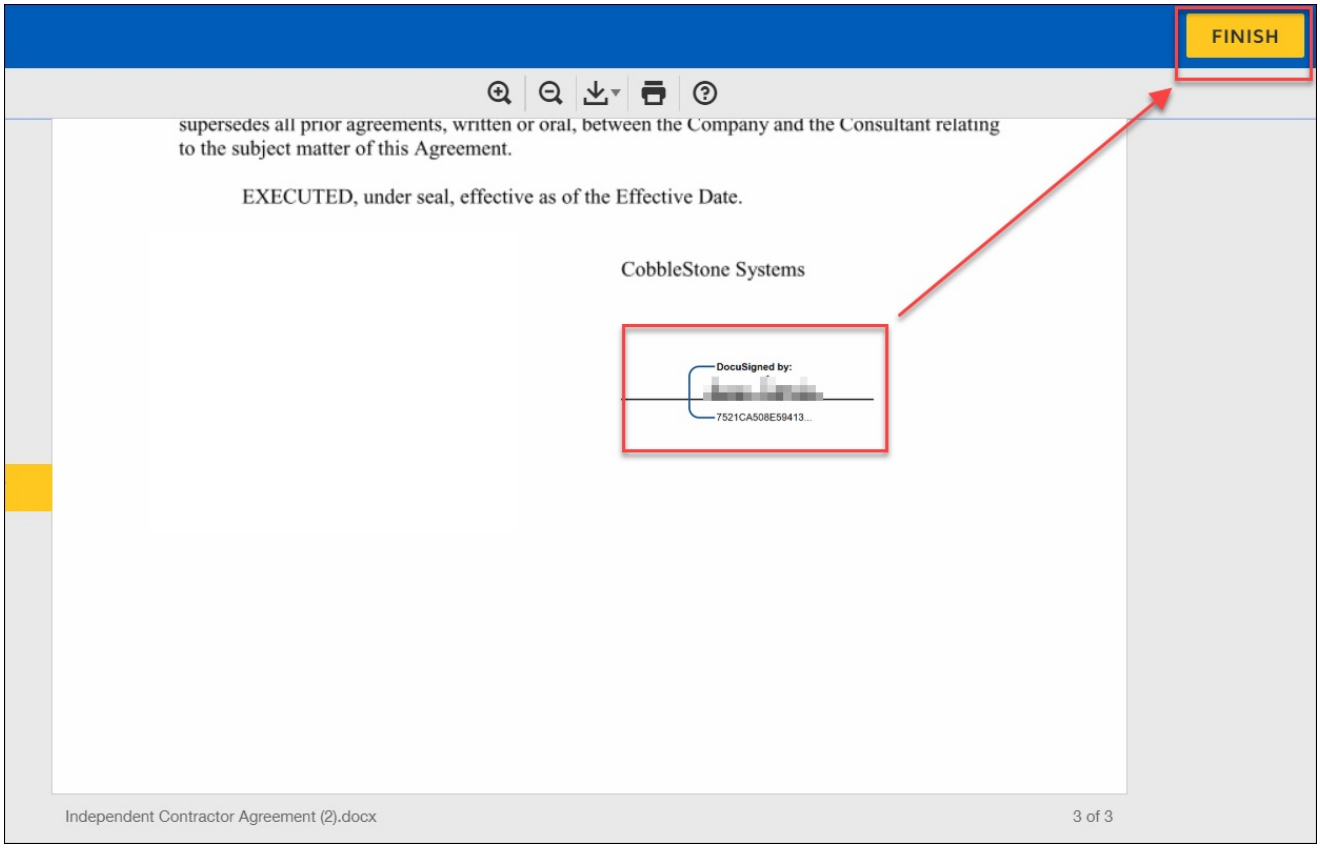


3. [Outside of Cobblestone Software] The signer(s) will receive an email from DocuSign to complete the signing process. Be sure to click **Finish** after signing.



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Note: Emails may go to a user's Clutter or Junk folder, be sure to routinely check if the DocuSign email was routed to your junk email folder

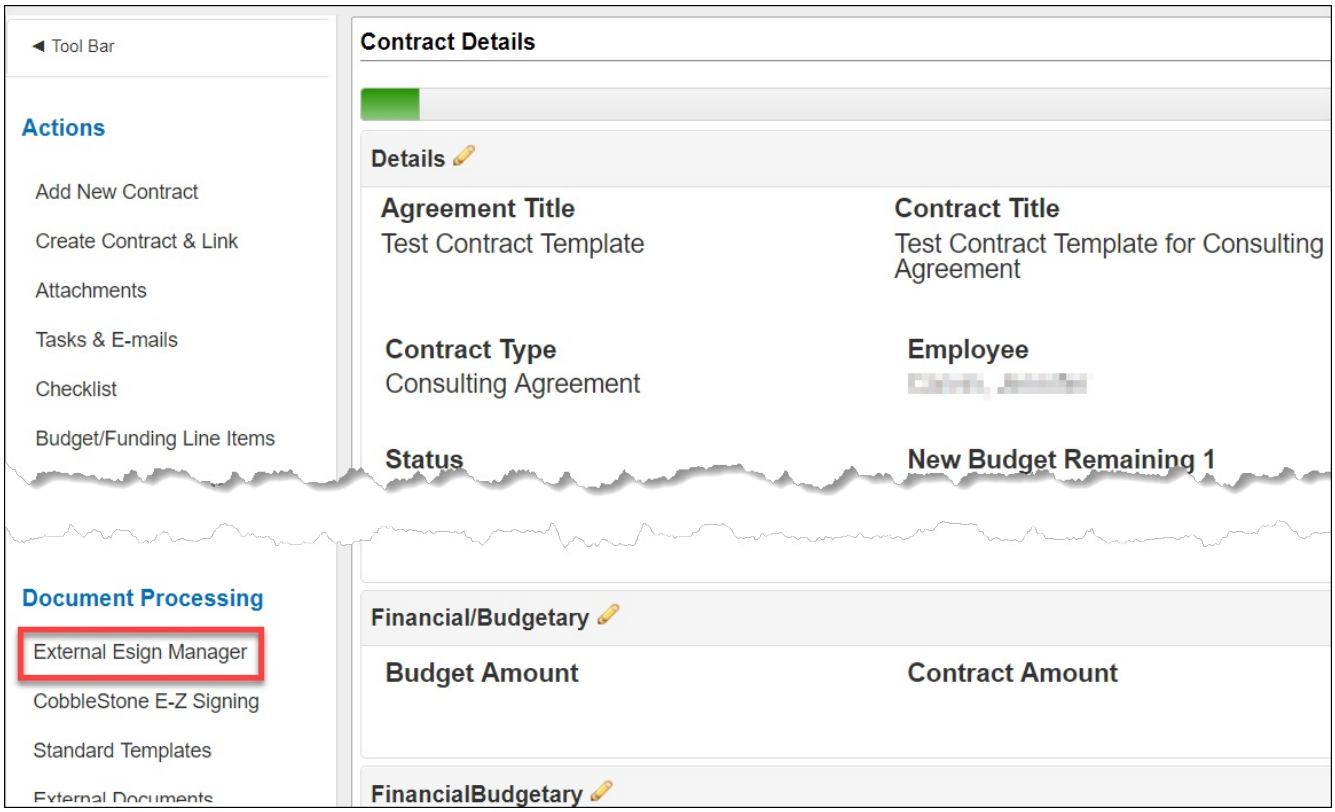


Contract Insight will routinely check DocuSign for a status of the signatures. Once all required signatures have been acquired, Contract Insight will pull the signed document and add it to the Files/Attachments section of the Contract Record.

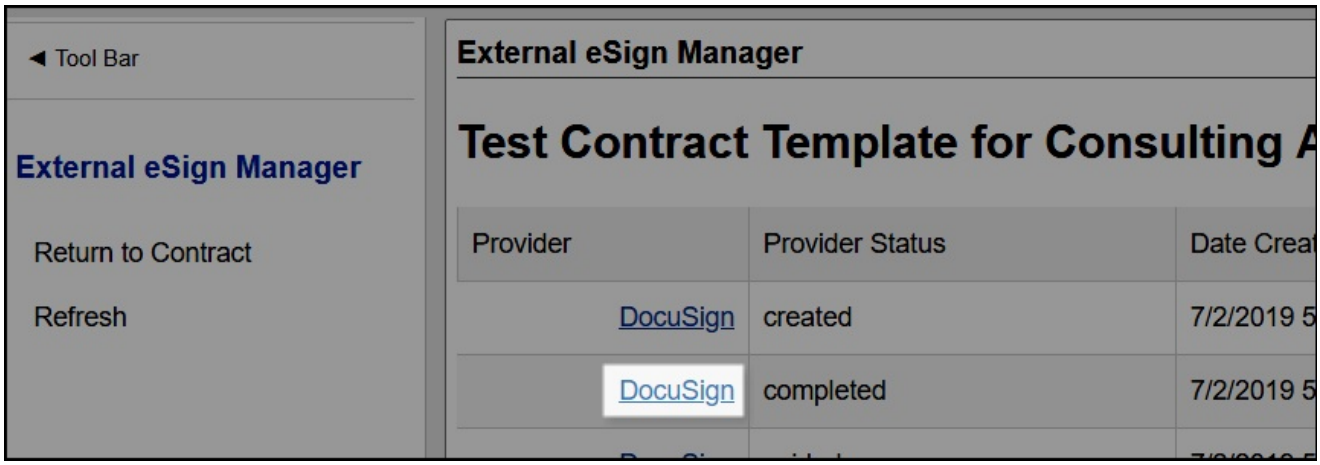
Check the status of the signature process

1. Return to the Contract Record and select **External Esign Manager** from the side menu.

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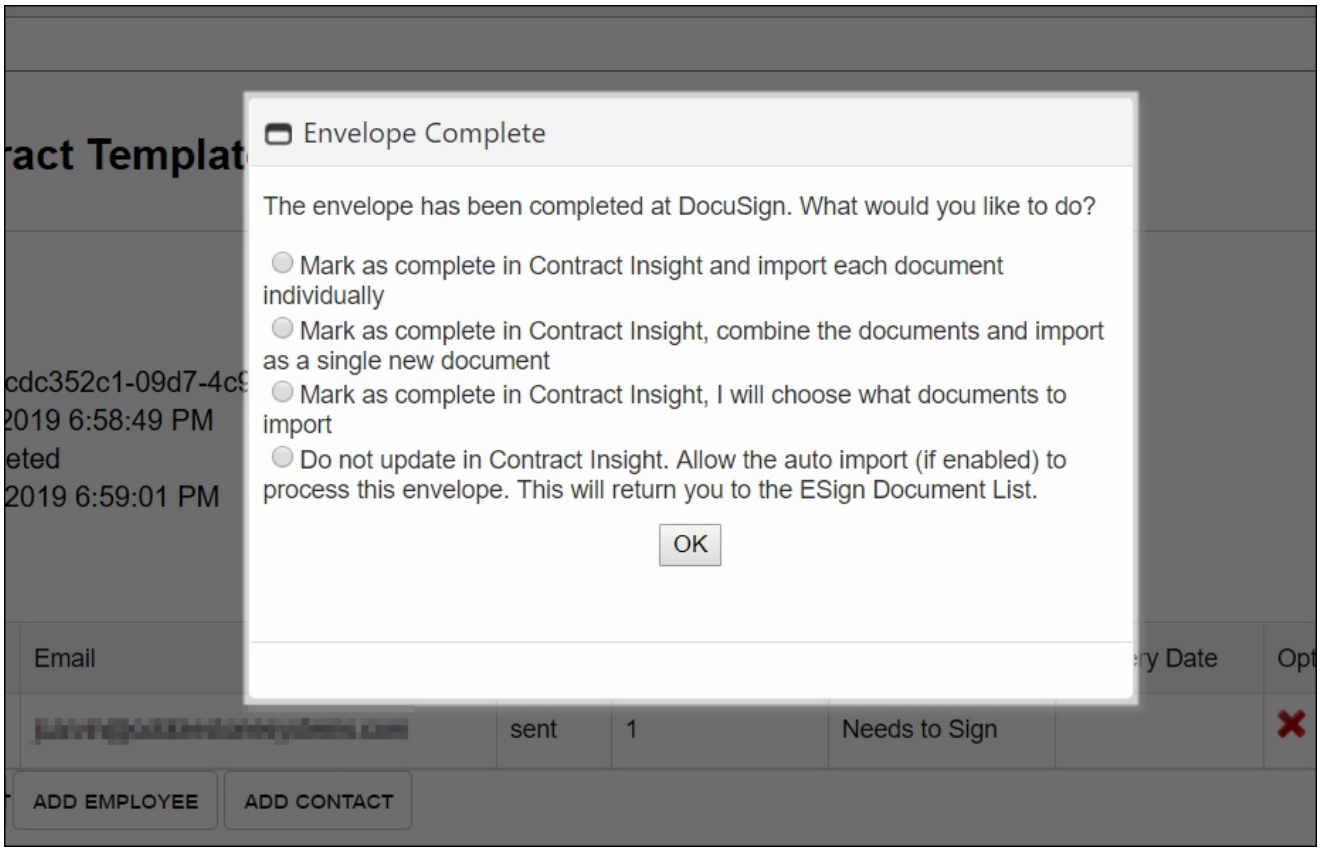


2. Select the **DocuSign** link to view the status for that signature process.

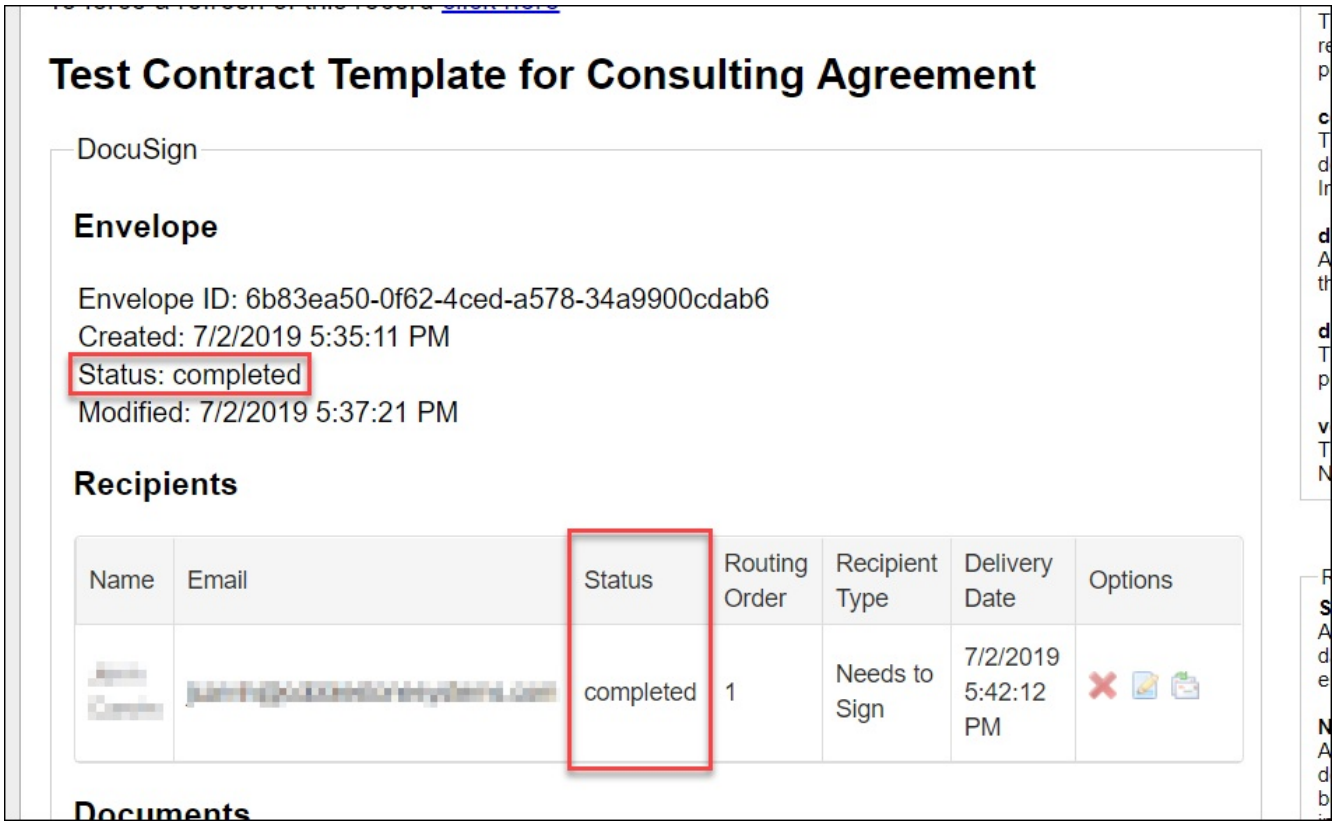


3. If all signatures have been acquired, Contract Insight will ask how to handle the signed document(s). **Choose an option** and select **OK**.

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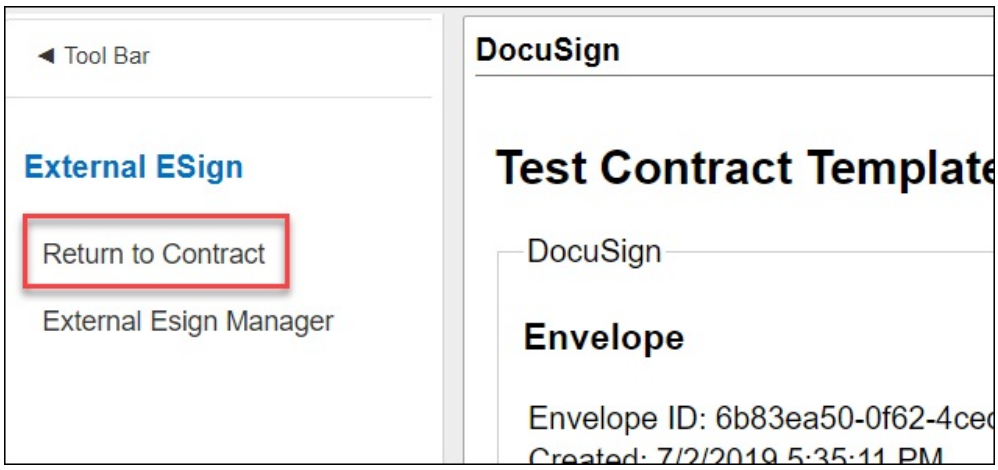


4. When complete, the Contract Insight signature monitoring page will show the process as complete.

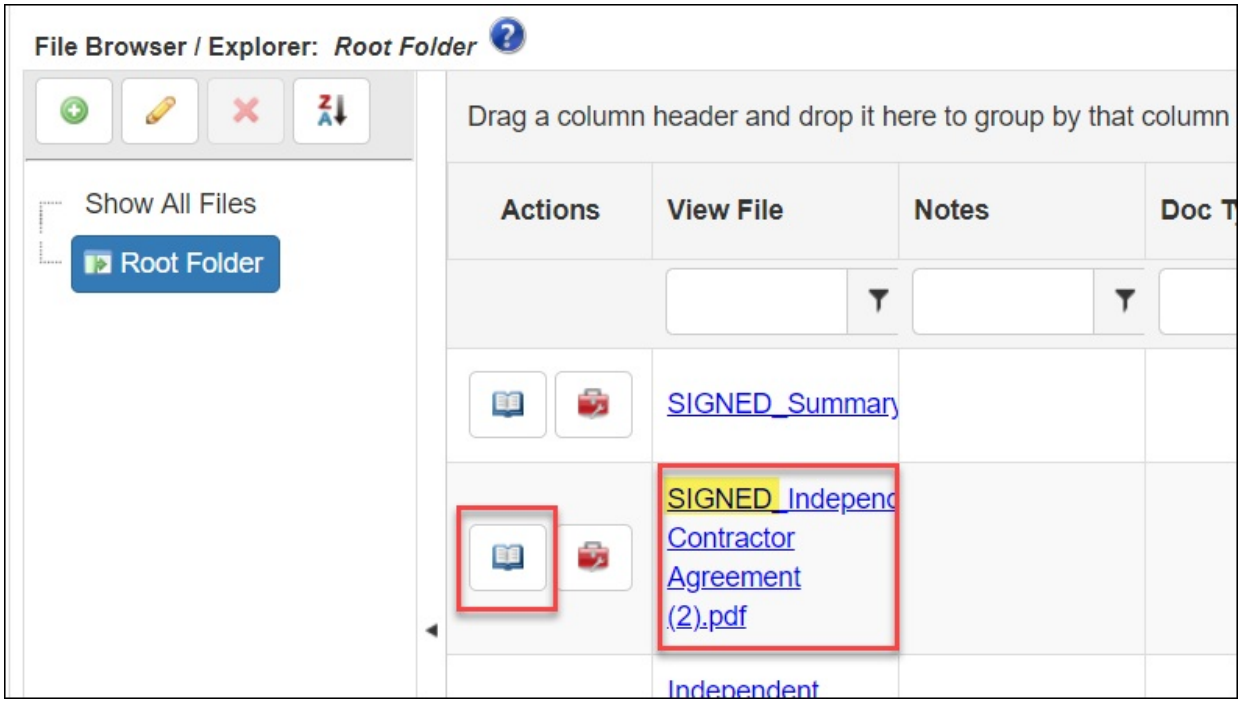


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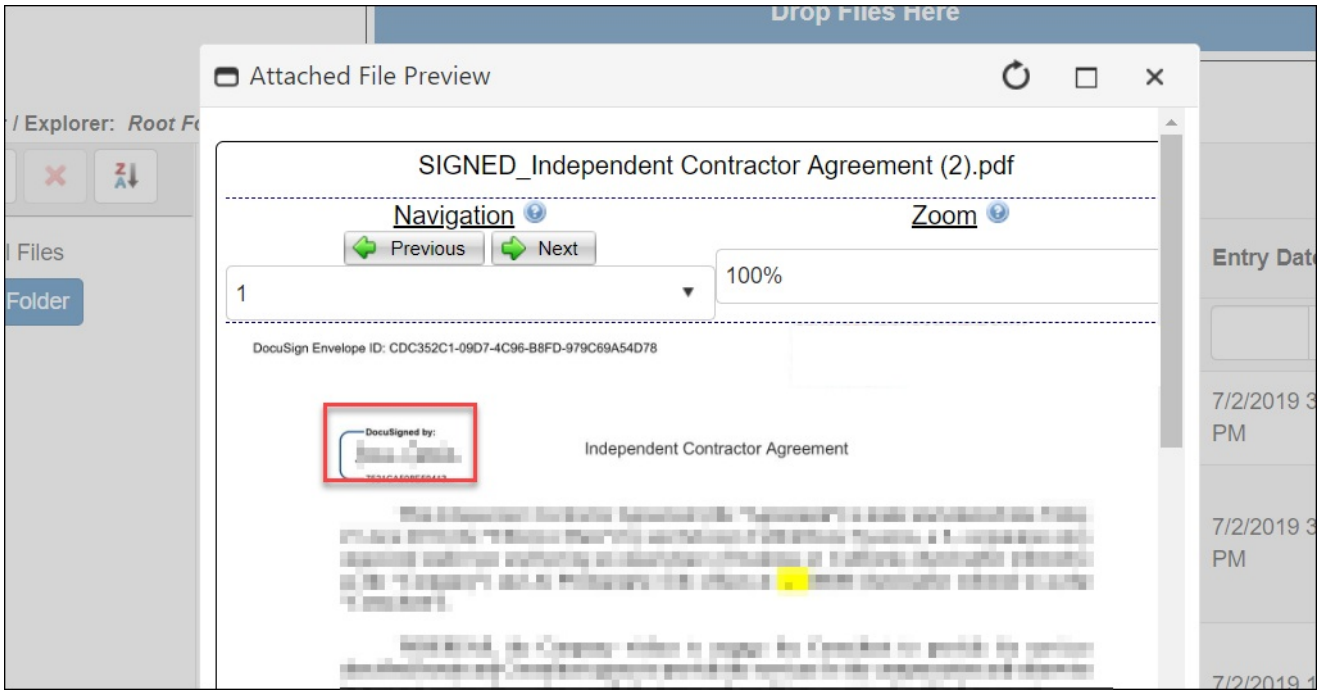
5. To view the signed document(s), click **Return to Contract** in the side menu.



6. Scroll down to the **Files/Attachments** section on the Contract Record to find the latest file(s) attached. To preview a file, click on the **Preview File/Attachment** icon.



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Expected Testing Results

1. The document was sent to DocuSign for signing.
2. The Contract Insight signature monitoring page shows the DocuSign process as Complete once all parties have signed.
3. The signed document has been attached to the Contract Record.

Note: "Checks" between Contract Insight and DocuSign are run on a schedule. Please wait up to 20 minutes after all parties have signed to verify process is complete and up to 30 minutes for the final document to be attached to the Contract Record.

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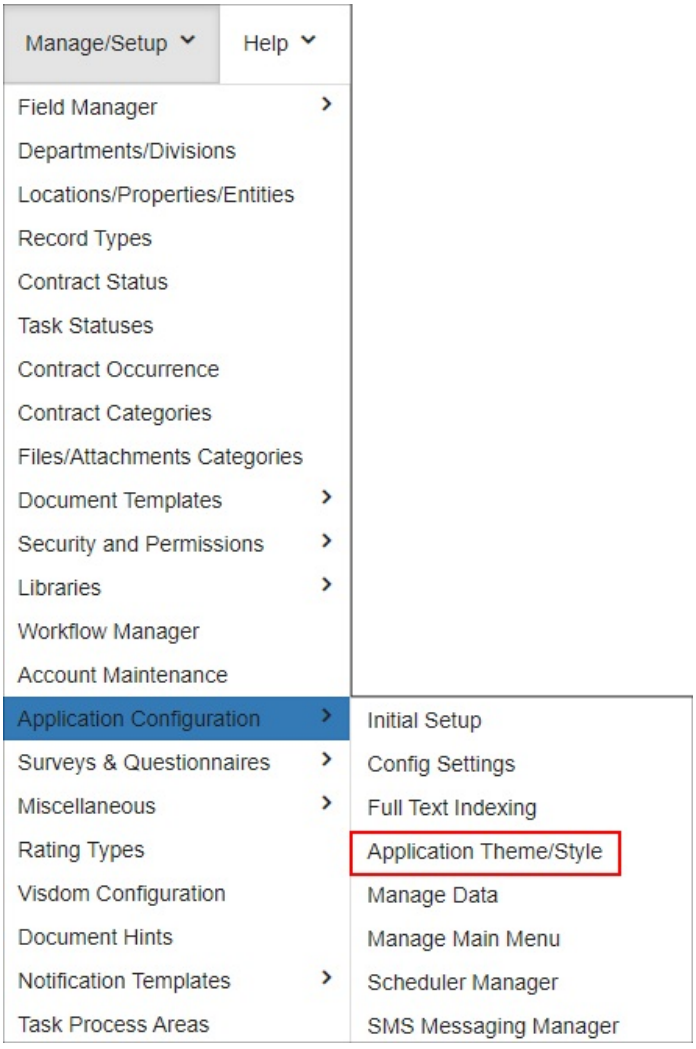
Application Theme and Style

Application Theme and Style

Application Theme and Style

To adjust the Theme/Style of your Contract Insight system, navigate to:

Manage/Setup > Application Configuration > Application Theme/Style



The below screenshots detail the available Theme/Style settings, and please note that these are the default settings. Any adjustments to the Theme/Style settings are global, and will affect all Users of your system.

Note: Changes will also be reflected in the **Document Collaboration & E-Signature** (optional add-on module) and the **Vendor/Client Collaboration Gateway** (optional add-on module) to ensure a unified look between the core application and these modules.

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Application Layout & Theme

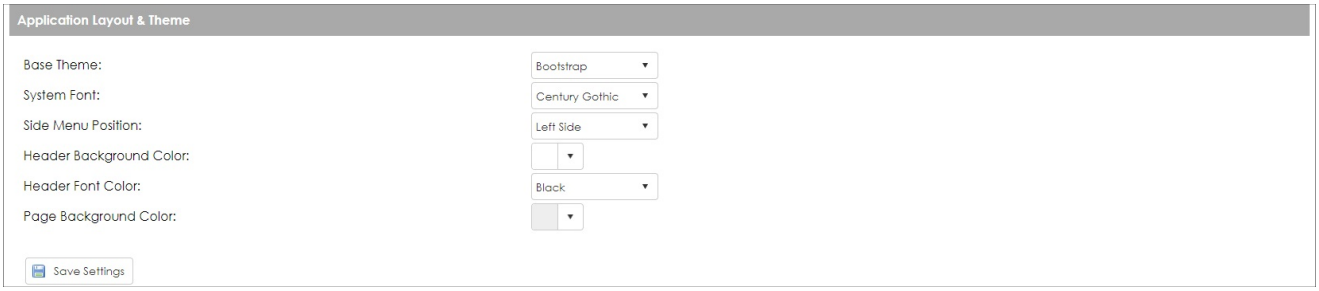
Base Theme: This setting adjusts the overall theme of your Contract Insight system. Adjusting this setting will provide the greatest overall change.

Base Font: This changes the font used throughout the system.

Side Menu Position: This changes whether the Side Menu appears on the left or right side throughout the system.

Header Font Color: This setting changes the background color used throughout Contract Insight

Page Background Color: This changes the Background Color used throughout the system.



Work Space and Menu Bar

Theme: This will adjust the Theme used for the Top Menu and can be set to be different from your Base Theme setting.

Show Item Icons: This setting determines whether or not Item Icons are shown.

Background Color: This setting establishes the Menu Bar's background color. This works only if using the Bootstrap theme.

Font Color: This setting determines the Font Color used in the Top Menu.



Side Menu

Docks Theme: This will adjust the Theme used for the Side Menu and can be set to be different from your Base Theme setting.

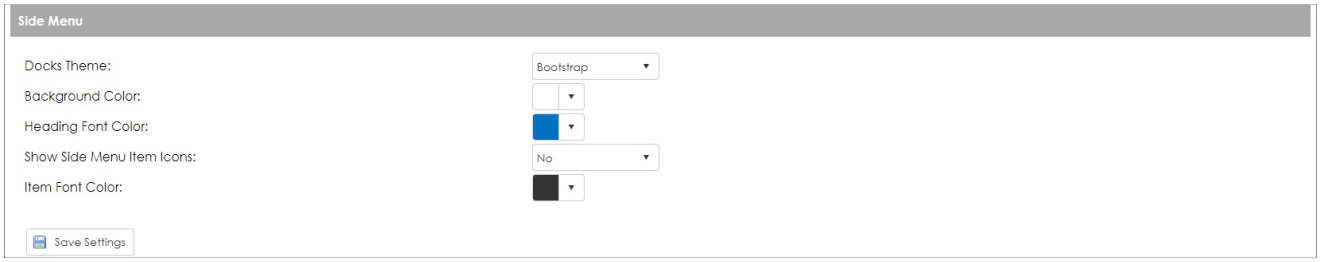
Background Color: This setting establishes the Side Menu's background color.

Heading Font Size: This setting determines the Font Size used for Side Menu Headers/Categories.

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Show Menu Item Icons: This setting determines whether or not Icons are shown for the Side Menu Items.

Item Font Color: This setting determines the Font Color used for Side Menu Items.



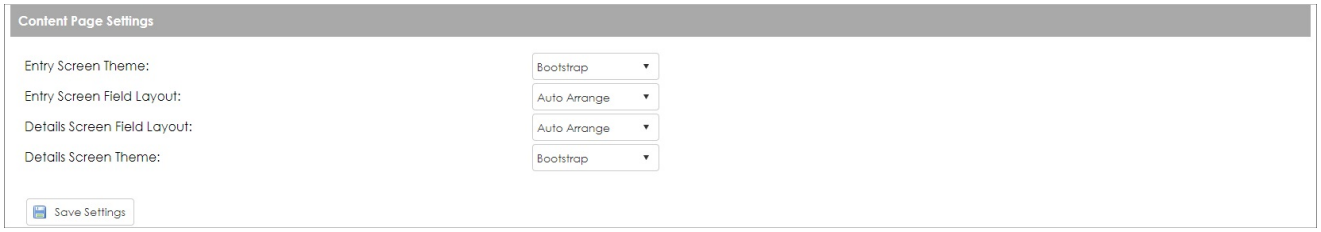
Content Page Settings

Entry Screen Theme: This adjusts the Theme used only on Entry Screens throughout your system, and can be set to be different from your Base Theme setting.

Entry Screen Field Layout: This adjusts how Fields are organized on your Entry Screens.

Details Screen Field Layout: This adjusts how Fields are organized on your Details Screens.

Details Screen Theme: This adjusts the Theme used only on Details Screens throughout your system, and can be set to be different from your Base Theme setting and from your Entry Screen Theme setting.



Footer

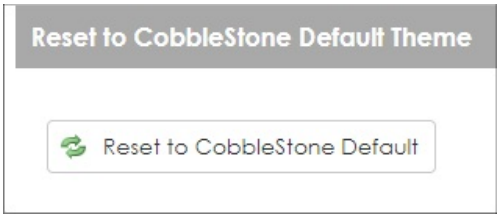
Font Color: This setting determines the Font Color used for the footer.



Reset to CobbleStone Default Theme

Reset to CobbleStone Default Theme: Clicking the Reset to CobbleStone Default Theme button removes all configured settings from the system and restores them to the CobbleStone default.

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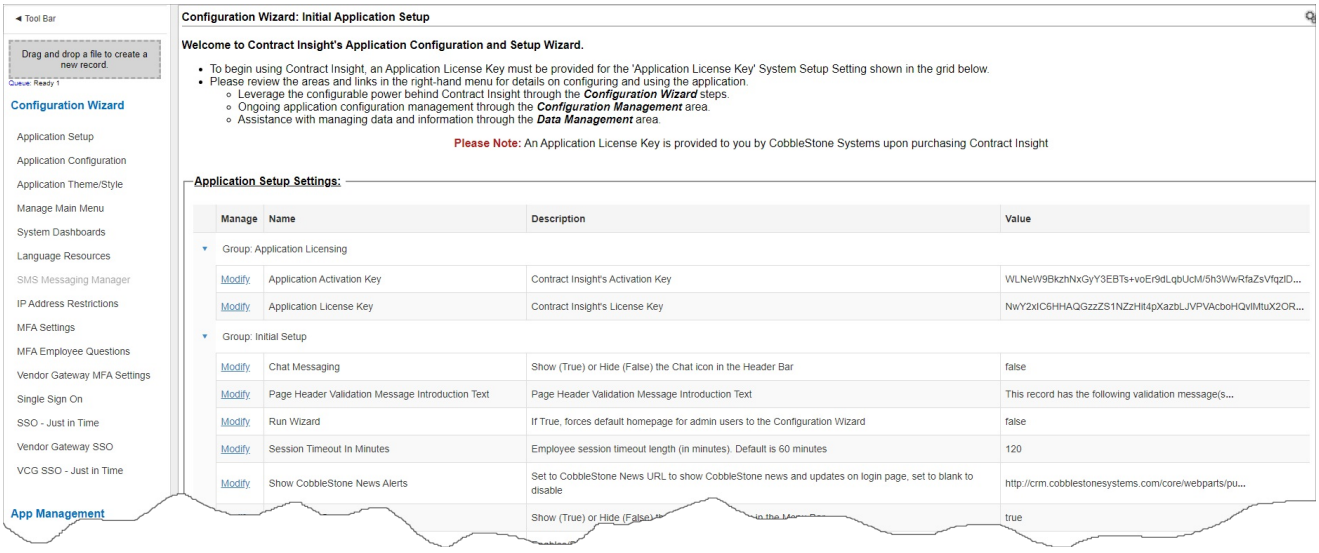
Application Setup

Application Setup

AppConfig: Application Setup

Application Setup Settings

The primary/initial screen to manage the application configuration in through the **Configuration Wizard: 1. Initial Application Setup** screen. This screen provides a brief overview of the functionality contained within the **AppConfig** as well as the initial setup settings for Contract Insight.



The name, description and value of each application configuration item associated with the selected configuration group will be displayed in the grid (as shown above).

To modify any of the configuration items, click **Modify** for that item. A prompt will appear ensuring that modification of the selected configuration item was intended.

If **OK** is selected, the **Modify Setup Item** window will display. If **Cancel** is selected, the modification will be aborted.

Modify Setup Item is where the value of the setup item can be changed. The name and description of the setup item will be shown, along with its current value. Modify the value as needed. Click **Update Setup Value** to finalize the modification. Click **Cancel** to abort the modification.

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Application Setup Settings

Group: Application Licensing

Application Activation Key: Contract Insight's Activation Key - provided by CobbleStone Software upon purchasing Contract Insight.

Application License Key: Contract Insight's License Key - provided by CobbleStone Software upon purchasing Contract Insight.

NOTE: System Admins will see an **Expired License Warning** when the **Application License Key** is set to expire within 30 days.

Group: Initial Setup

Chat Messaging: Show or Hide the Chat Icon in the Menu Bar.

Page Header Validation Message Intro Text: Set the page header validation message introduction text.

Run Wizard: If set to True, the default homepage for Admin users is the Configuration Wizard.

Session Timeout in Minutes: Employee session timeout length (in minutes). The default is 60 minutes. One minute before the expiration, a timer displays on screen allowing the session to continue or, if nothing is clicked, expire.

Show CobbleStone New Alerts: Set the URL to CobbleStone News to show CobbleStone News and Updates. Set it to blank to disable it. Set it to a 'dummy' URL to use only your organization's newsletters. If disabling the functionality, refresh your web browser and the top menu icon will be gone.

Show Work Spaces: Show or Hide the Work Space Menu in the Menu Bar. Only hide it if not using additional Work Spaces.

Site Address Monitoring: Enable or disable the site address to be monitored and updated based upon the URL used to access the site.

Website Address: Store's the application's website address. This is set during the initial startup of the application.

-

Group: Task Management

Allow Continuous Escalations (Escalations on Escalated Tasks): Enable or disable additional escalations for already escalated tasks.

Allow for File Links in Task Email Alerts: Enable or disable links to files from showing on task email alerts.

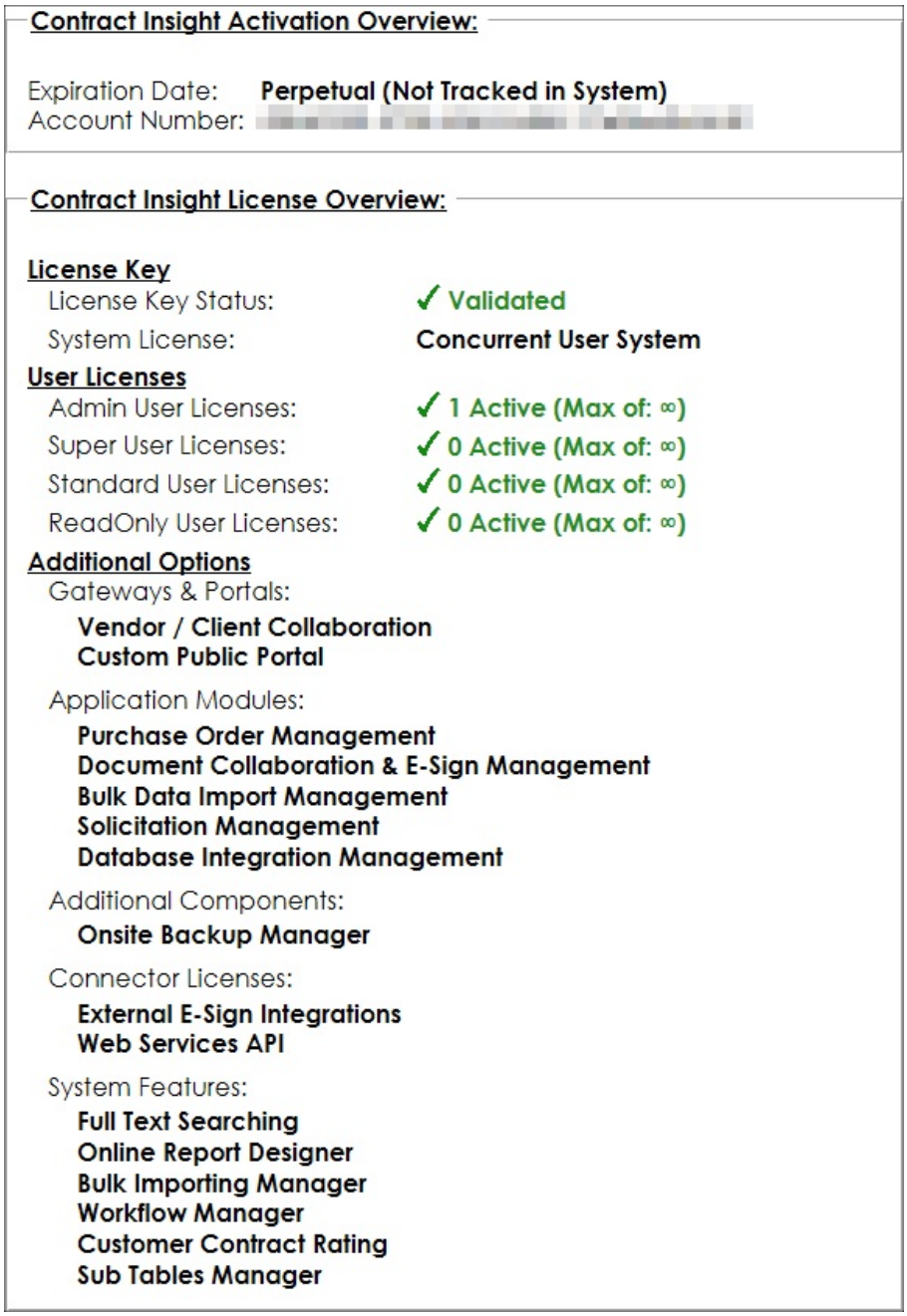
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Continuous Escalations - Escalate after days: Specify the number of days after the end date of escalated tasks to escalate again.

Single Threaded Hierarchical Workflows: Set Workflow Manager to handle workflow tasks in a single threaded hierarchical structure.

License Overview

In addition to the initial setup settings, this page provides a detailed breakdown of the Licensing Information for Contract Insight.



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License Key:

Displays the Status of the License Key (Validated or Invalid) as well as the type of system license (Concurrent or Named users).

User Licenses:

Displays the number of active users as well as the max number of users licensed for Contract Insight.

Note: For Legacy/Traditional Licenses, this section will only show total users due to there being no user levels.

Additional Options:

Displays any/all additionally licensed options for Contract Insight such as Gateways & Portals, Modules, Add-On Components, or Connector Licenses.

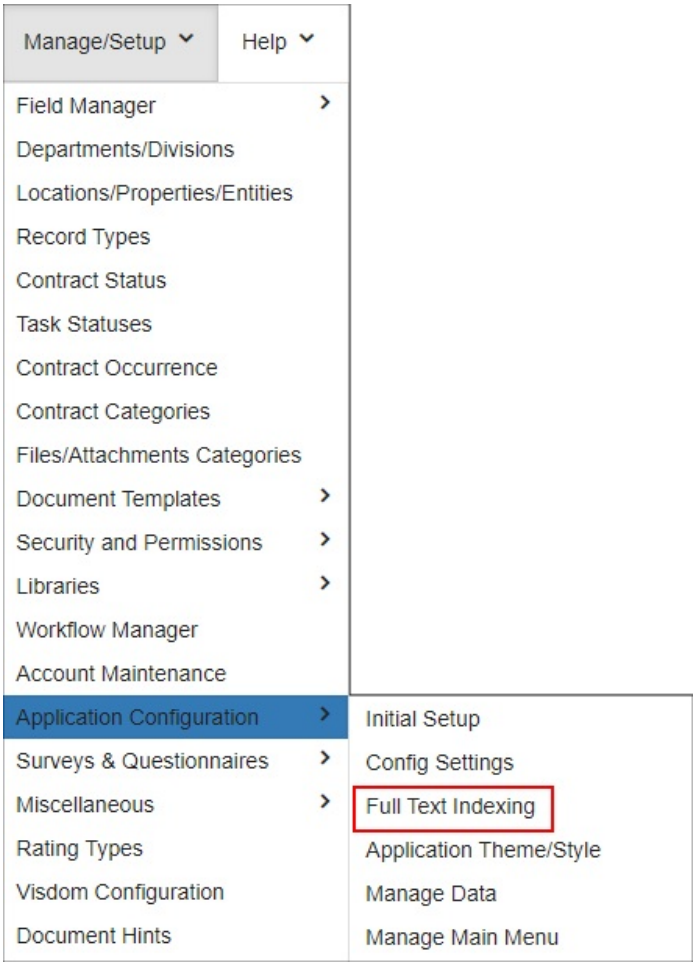
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Full Text Indexing

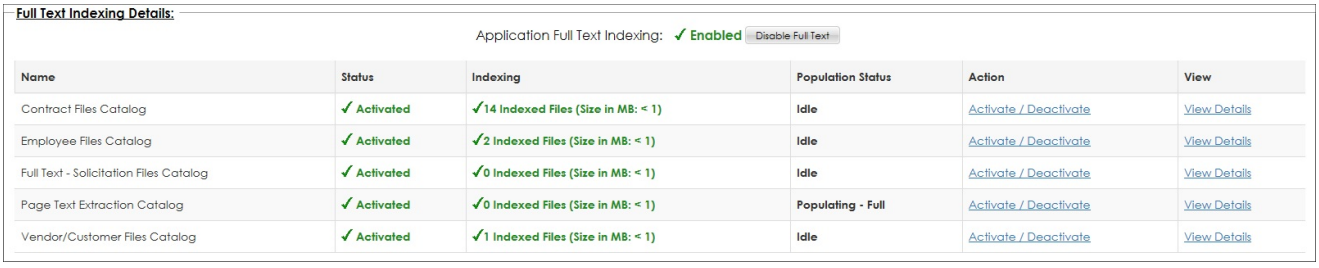
Full Text Indexing

AppConfig: Full Text Indexing

The **Full Text Indexing Details** screen is used to handle all interaction(s) with Contract Insight's Full Text Indexing of documents/attachments to Contracts, Employees, and Vendors/Customers. Full Text Indexing allows for detailed searching of text within files such as Word documents, Excel spreadsheets and text-based .pdf files.



The information provided in the grid on this screen shows a snap-shot overview of the Full Text Indexing settings for your Contract Insight Application.



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Indexing Details:

Application Full Text Indexing

The main setting/switch for full text indexing within the Contract Insight Application. This must be enabled for full text indexing to be utilized.

Full Text - Contract Files Catalog

This row will show all the related information for full text indexing on all Contract Attachments/Files that can be indexed.

Full Text - Employee Files Catalog

This row will show all the related information for full text indexing on all Employee Attachements/Files that can be indexed.

Full Text - Vendor/Customer Files Catalog

This row will show all the related information for full text indexing on all Vendor/Customer Attachments/Files that can be indexed.

Columns:

Name

The name of the Full Text Index Catalog being managed by the Contract Insight Application.

Status

Denotes if the catalog is actived or deactivated.

Indexing

Shows the current indexing level (total number of indexed files and the total size of all indexed files for the catalog)

Population Status

Shows the status of the catalog. If it is currently indexing attachments/files it will denote that it is in progress, otherwise it will show "Idle".

Action

Link to toggle the activation of a full text index catalog between activated and deactivated.

View

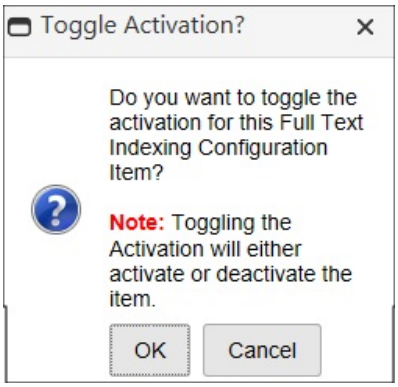
Link to view the details of all indexed files for a catalog.

Activation Toggle

Full Text Indexing can be further refined to only be utilized on specific areas of the system (since having full text indexing on multiple areas of the system can hinder page loading speeds depending on client connection speeds). Each catalog (Contracts, Employees, and Vendors/Customers) can be either activated or deactivated. If a catalog is activated, it will actively index all attachments/ files for its area as they are uploaded. If a catalog is deactivated, nothing will occur when an attachment/file is uploaded.

When clicking the activation toggle, a prompt appears ensuring that the activation toggle button was intended for the catalog in question.

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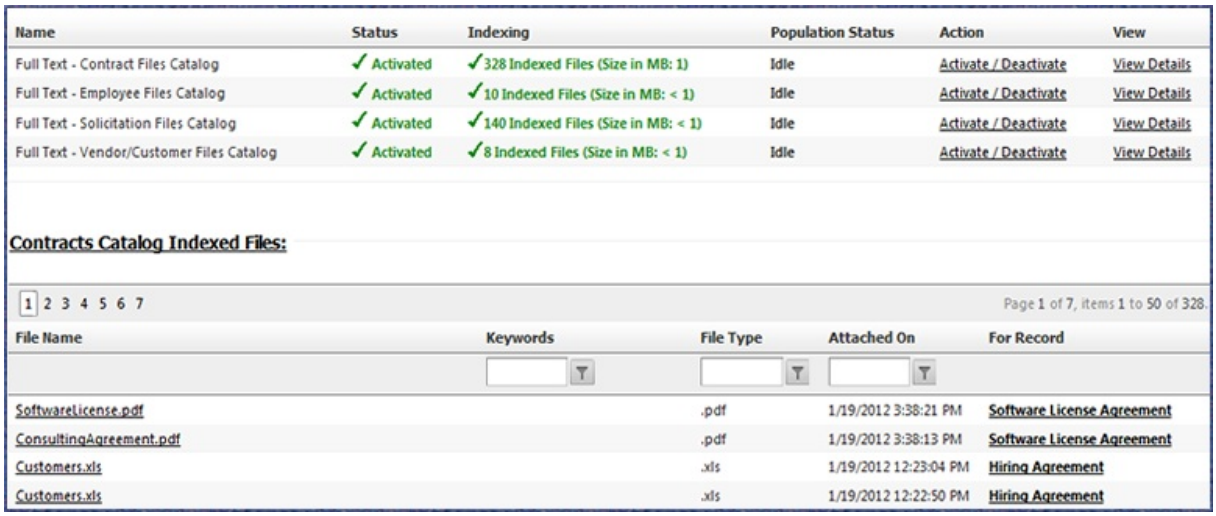


By clicking **OK**, the toggle activation will execute (this will deactivate the catalog if it was currently active, and vice versa).
Clicking **Cancel** will abort the toggle activation.

View Indexed Files Details

In addition to managing Full Text Indexing activation and deactivation, this screen allows for detailed viewing of all indexed files for each activated catalog.

To view the details of all indexed files for a catalog, click **View Details** for that catalog.



Name	Status	Indexing	Population Status	Action	View
Full Text - Contract Files Catalog	✓ Activated	✓328 Indexed Files (Size in MB: 1)	Idle	Activate / Deactivate	View Details
Full Text - Employee Files Catalog	✓ Activated	✓10 Indexed Files (Size in MB: < 1)	Idle	Activate / Deactivate	View Details
Full Text - Solicitation Files Catalog	✓ Activated	✓140 Indexed Files (Size in MB: < 1)	Idle	Activate / Deactivate	View Details
Full Text - Vendor/Customer Files Catalog	✓ Activated	✓8 Indexed Files (Size in MB: < 1)	Idle	Activate / Deactivate	View Details

Contracts Catalog Indexed Files:

1 2 3 4 5 6 7 Page 1 of 7, items 1 to 50 of 328.

File Name	Keywords	File Type	Attached On	For Record
SoftwareLicense.pdf		.pdf	1/19/2012 3:38:21 PM	Software License Agreement
ConsultingAgreement.pdf		.pdf	1/19/2012 3:38:13 PM	Software License Agreement
Customers.xls		.xls	1/19/2012 12:23:04 PM	Hiring Agreement
Customers.xls		.xls	1/19/2012 12:22:50 PM	Hiring Agreement

This grid provides the file name, keywords, file type, and date attached for each indexed attachment/file for the catalog. In addition, the grid will show the record to which the attachment/file was uploaded.

If viewing the **Contracts Catalog**, this will be the title of the Contract; if viewing the **Employees Catalog**, this will be the Employee's Name; if viewing the **Vendor/Customer Catalog**, this will be the Vendor/Customer Name. The **File Name** and **For Record** columns in the grid are clickable. The **File Name** column will directly open the indexed file; the **For Record** column will directly link to the contract, employee, or vendor/customer record to which the attachment/file was uploaded.

*For Deployed Instances of Contract Insight, please review the **Client Deployed Resources Site Manual** to make sure that all proper Full Text Indexing settings have been installed on your organization's SQL Server instance:

http://csfiles.cobblestonesystems.com/NewInstall/02.%20ContractInsight_InstallManual_SQLDB.pdf

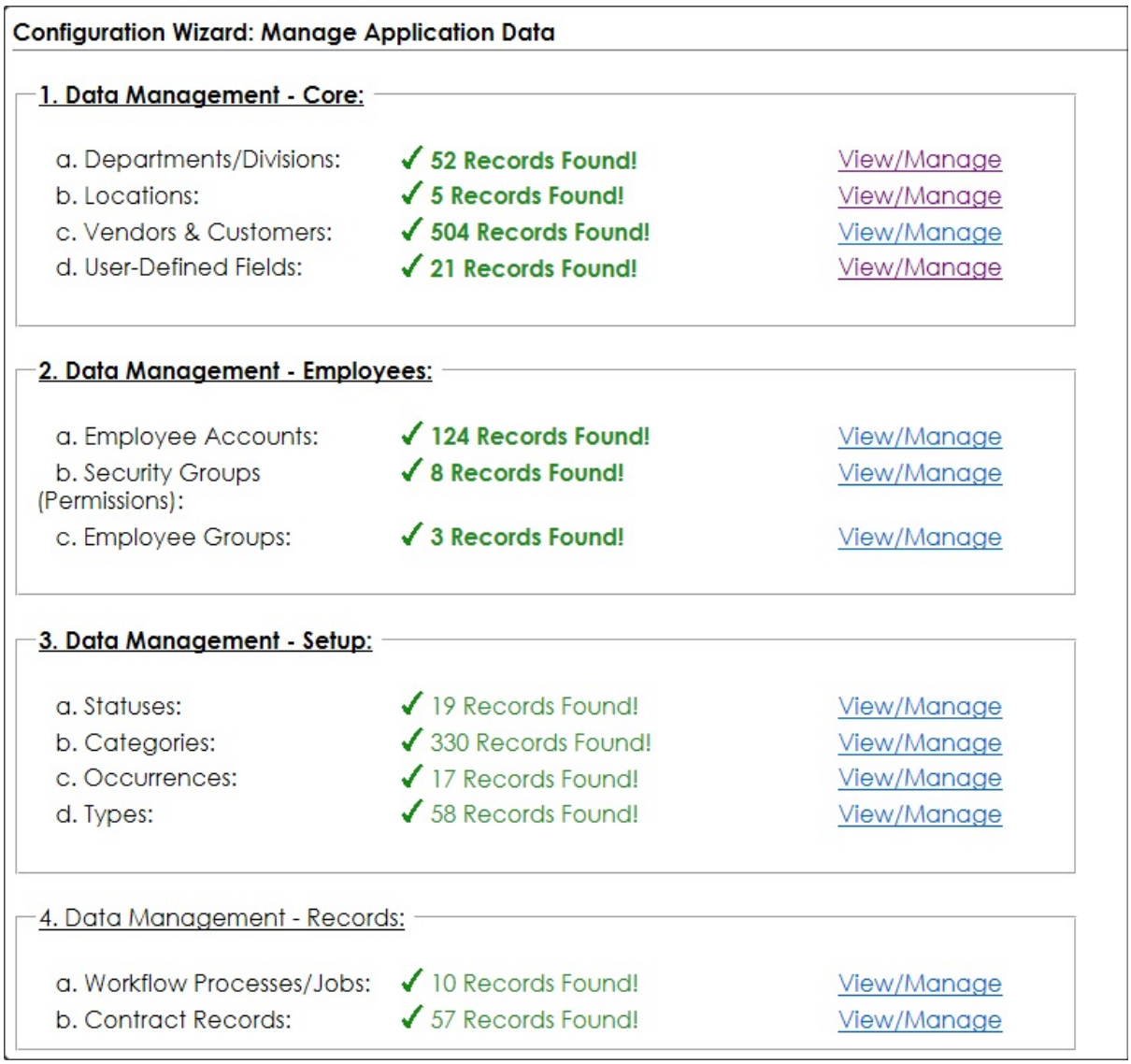
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Manage Application Data

Manage Application Data

AppConfig: Manage Application Data

This **Configuration Wizard: Manage Application Data** page provides a complete overview of application readiness and stored data for all the main areas of management within the Contract Insight Application. The page is broken into number sections. These numbered sections correlate to the order in which CobbleStone Systems best practices recommended data be imported/entered into the Contract Insight Application.



Each numbered section provides further breakdown in terms of ordering the areas within each section that data should be imported/entered into. Each of these rows will provide the name of the area (ex: Departments/Divisions, Employee Accounts), as well as the number of records found for each area, and a link to "View/Manage" each area.

Number of Records

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The key to working with this page is the middle column, or the **Number of Records** found for each area. This will help give system administrators an overview or road map to what areas of data have been imported/entered, and which areas still remain. Several areas out of the box will contain default records pertaining to the standard provided data with any Contract Insight application. Therefore, this page should not be taken as a be-all end-all but as an overview to assist with the successful importing/entering of all necessary data into the Contract Insight Application.

View/Manage Links

The **View/Manage** link for each area will take you directly to the page(s) to manage and edit its information.

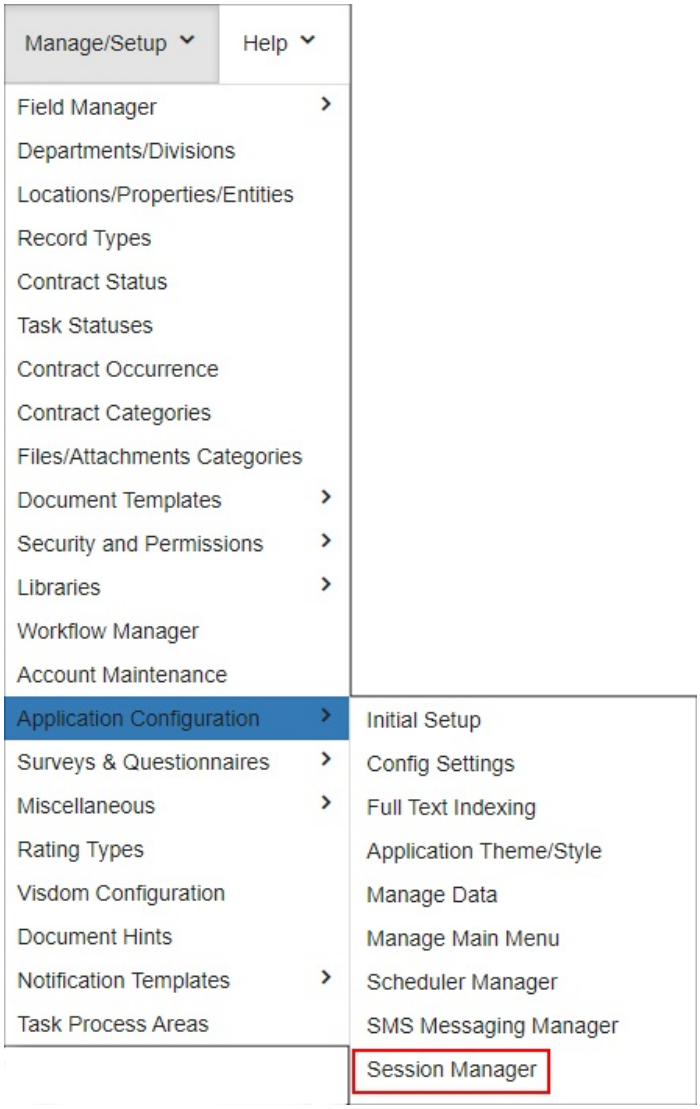
This page should be used in combination with the **Data Import Manager** to help assist in the management and importing of all necessary data.

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Manage Current Sessions

Manage Current Sessions

AppConfig: Manage Current Sessions

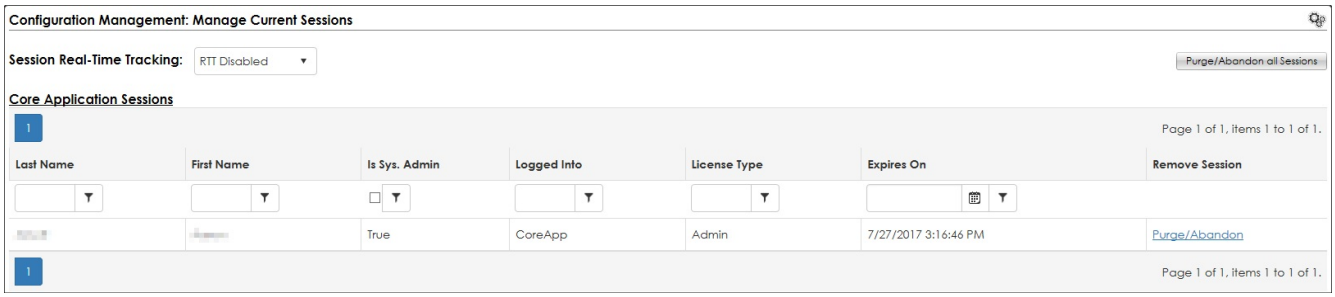


The **Configuration Management: Manage Current Sessions** page provides full tracking and management of all active sessions along with the ability to purge/remove user sessions if needed.

There are three main components to the Session Management screen:

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- **Session Real-Time Tracking**
    - Drop down box to enable or disable real time tracking of sessions within the Contract Insight Application
- **Purge/Abandon all Sessions**
    - Button to purge/remove all sessions within the Contract insight Application except the person performing the action.
- **Session Management Grid**
    - Grid-view of all current/active sessions within the Contract Insight Application.



Session Real-Time Tracking

By enabling this option, the information in the grid will repopulate every 15 seconds with the most up-to-date information on the current/active sessions within Contract Insight.

Purge/Abandon all Sessions

This button should only be clicked if there is a pressing need to clear out all current/active sessions within Contract Insight. Clicking of this button will be logged into Contract Insight's audit log because the functionality of the button will immediately invalidate all other employee's logged into Contract Insight and force them back to the sign-in page.

Session Management Grid

This grid displays all relevant information pertaining to each employee's session with Contract Insight. The table will track the name and system admin status of each logged in employee. In addition, the manager will track the following key aspects:

1. The area of the system the employee is **Logged Into** (ex: Core Application, SharePoint Web Parts, etc.)
2. The Employee's **License Type** (for Leveled Licenses)
3. The current expiration of the Employee's session (provided they do not take another action)

The far right contains **Purge/Abandon** links which allow for one-off purging or abandoning of users' sessions. For example, if there is an active session for an employee who forgot to logout out of the system, an administrator can go to this page and purge their session to free up a license with which another employee can log in.

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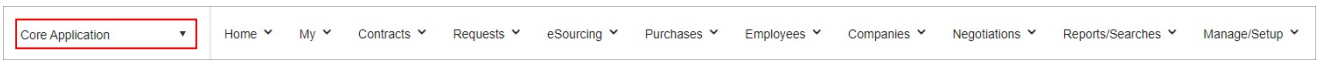
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Manage Main Menu: Work Spaces

Manage Main Menu: Work Spaces

Manage Main Menu: Work Spaces

System Admins can customize main menu views and assign them to groups of users via Work Spaces. Work Spaces allow System Admins to show and hide specific menu items from specific users to allow greater security and ease of use for users. User permissions still impact menu items; if a menu item is assigned, the permissions applied can impact use/availability. All users have access to the Core Application Work Space unless unassigned by a System Admin.

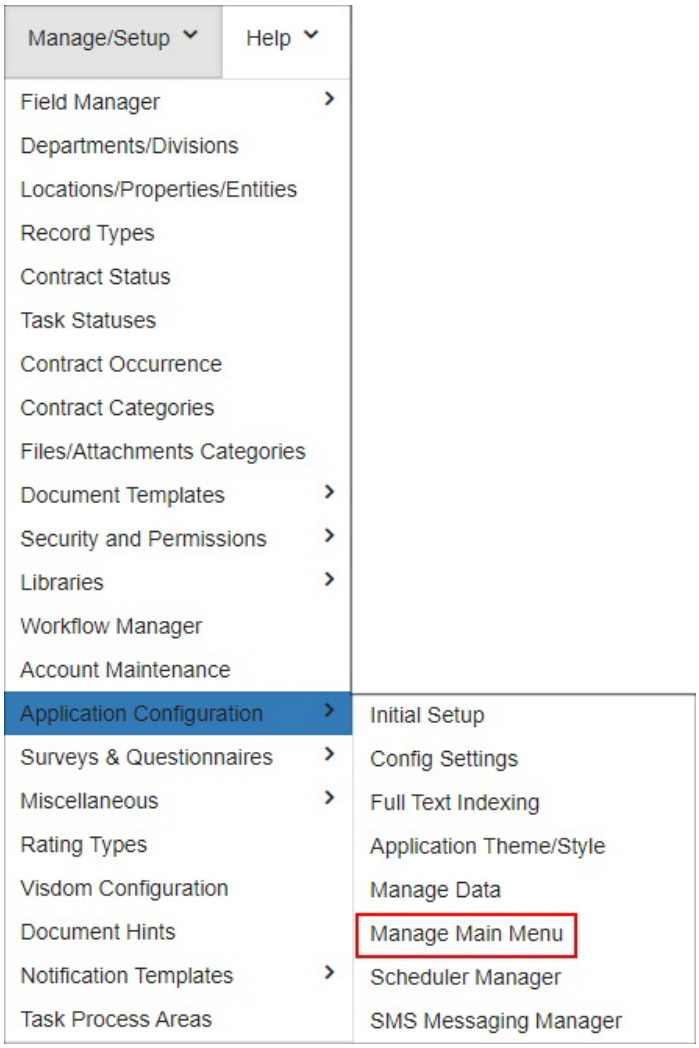


Accessing Work Space Configuration

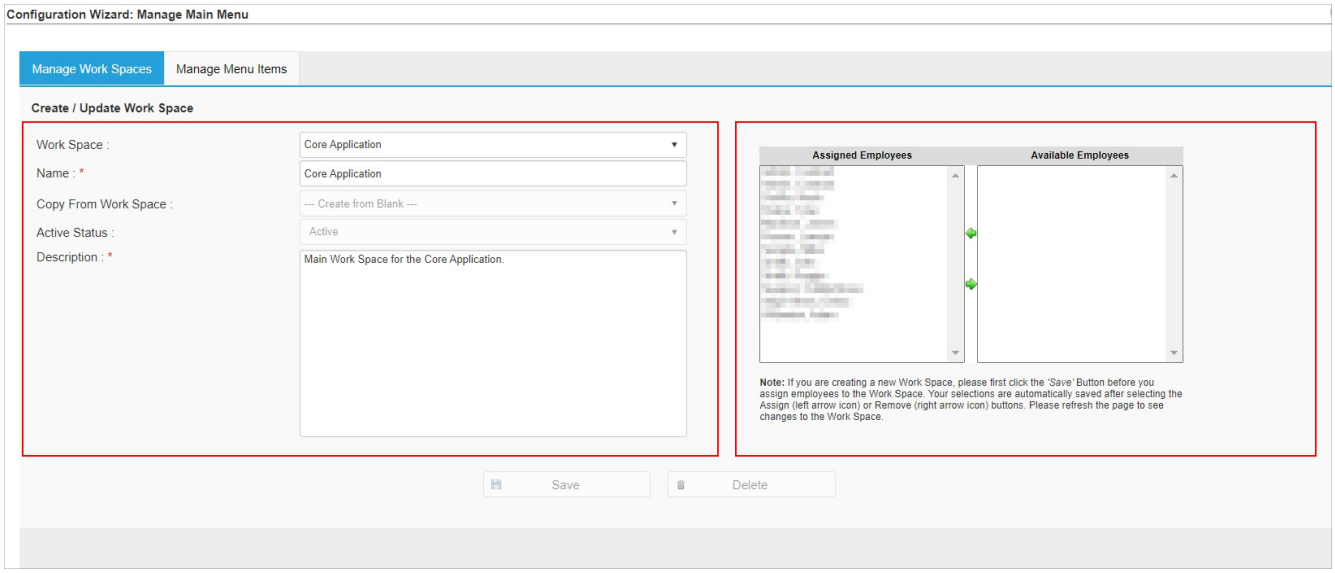
1.To access and configure Work Spaces, log in as a System Admin.

2.Navigate to **Manage/Setup - Application Configuration - Manage Main Menu**.

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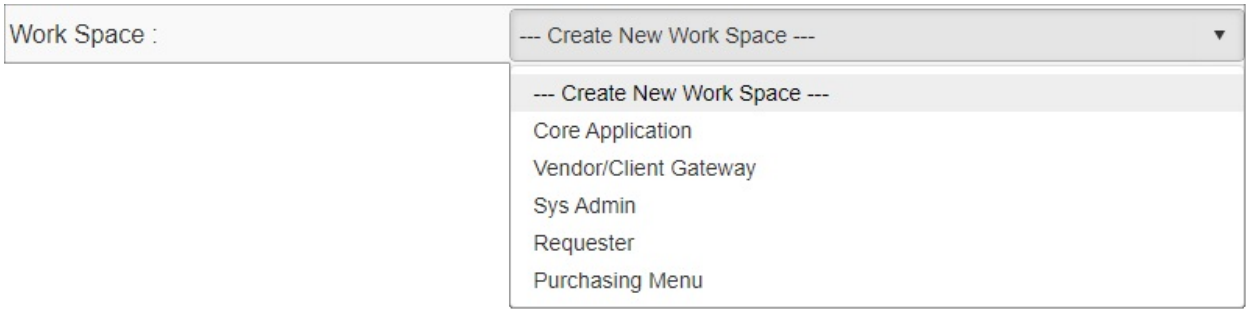
The **Configuration Manager: Manage Main Menu** screen displays. On this screen, an admin user can Modify the Core Application (Default) work space, modify any work spaces already created, assign users to existing work spaces, and create new work spaces.



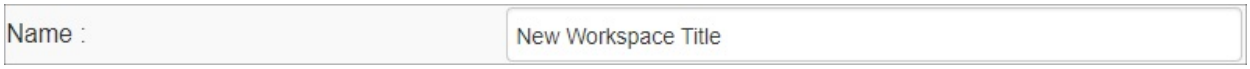
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Creating and Editing Work Spaces

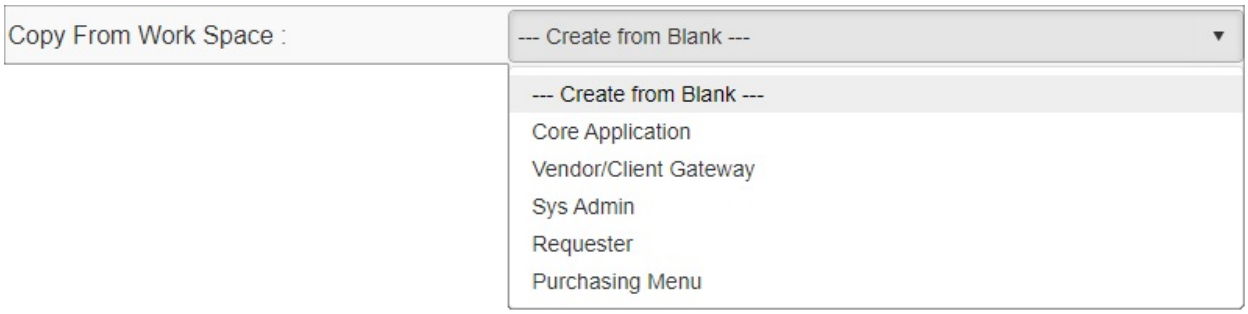
1.Click **Create New Work Space** from the **Work Space** pick-list.



2.Enter a short, descriptive title into the **Name** field.



3.Creating a new Work Space gives you the option to Create from Blank or Copy From Work Space already created.



Note: If creating from a blank work space, no menu items populate. Best practice is to copy from an existing work space and then hide whichever menu items you desire.

4. Enable the work space by setting the **Active Status** to Active.



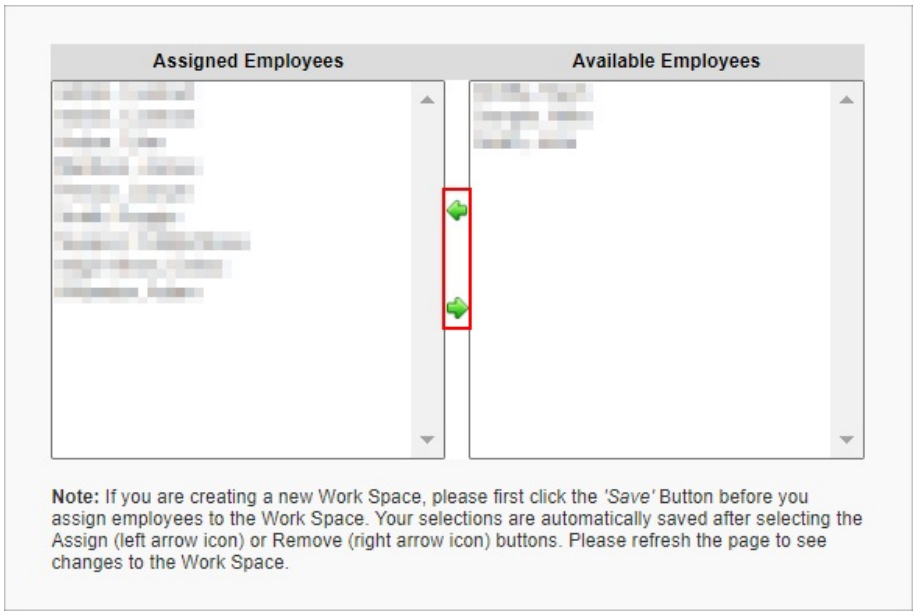
5. When done making changes, click **Save** at the bottom of the area.



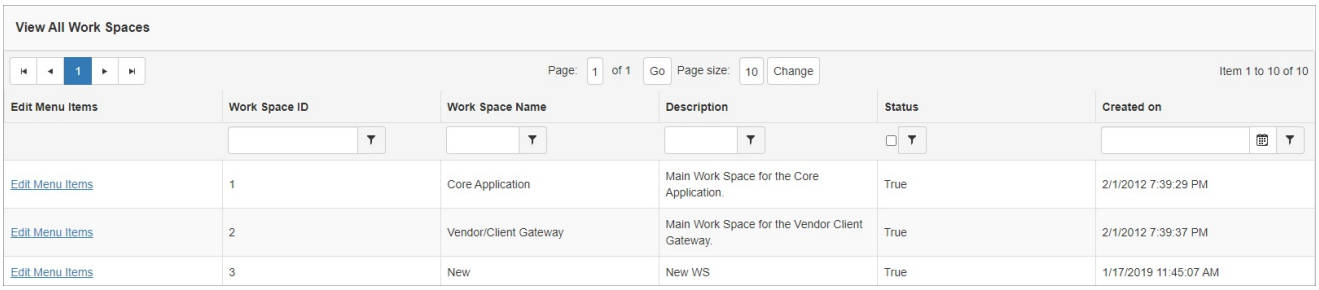
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Note: The core application work space cannot be deleted, select the work space from the drop down and hit the delete button.

6. Once saved, assign the desired employee(s) to the work space. Select the Employee Name(s) from the list of **Available Employees** and click the **left-facing green arrow** to assign the employee. To remove an assigned employee, select the Employee Name(s) from the list of **Assigned Employees** and click the **right-facing green arrow**.

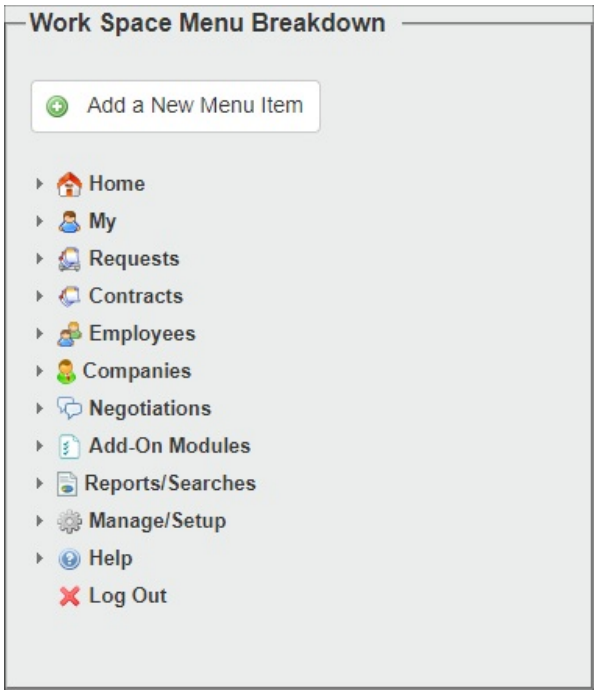


7. To Edit the menu items for the work space created, click **Edit Menu Items** for the appropriate line item at the bottom of the screen.

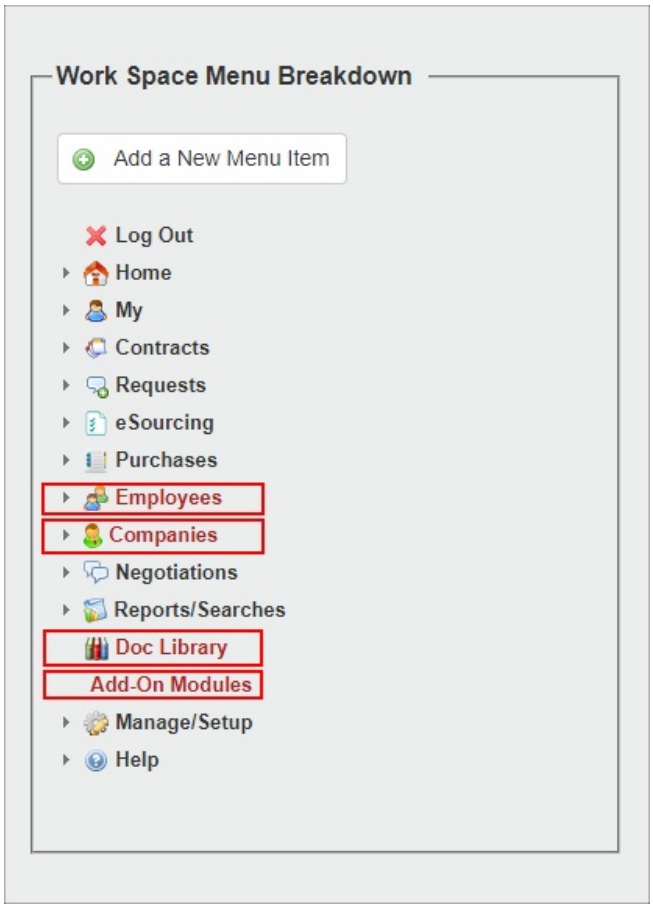


8. The **Manage Menu Items** tab displays. The Work Space Menu Breakdown shows the main menu items.

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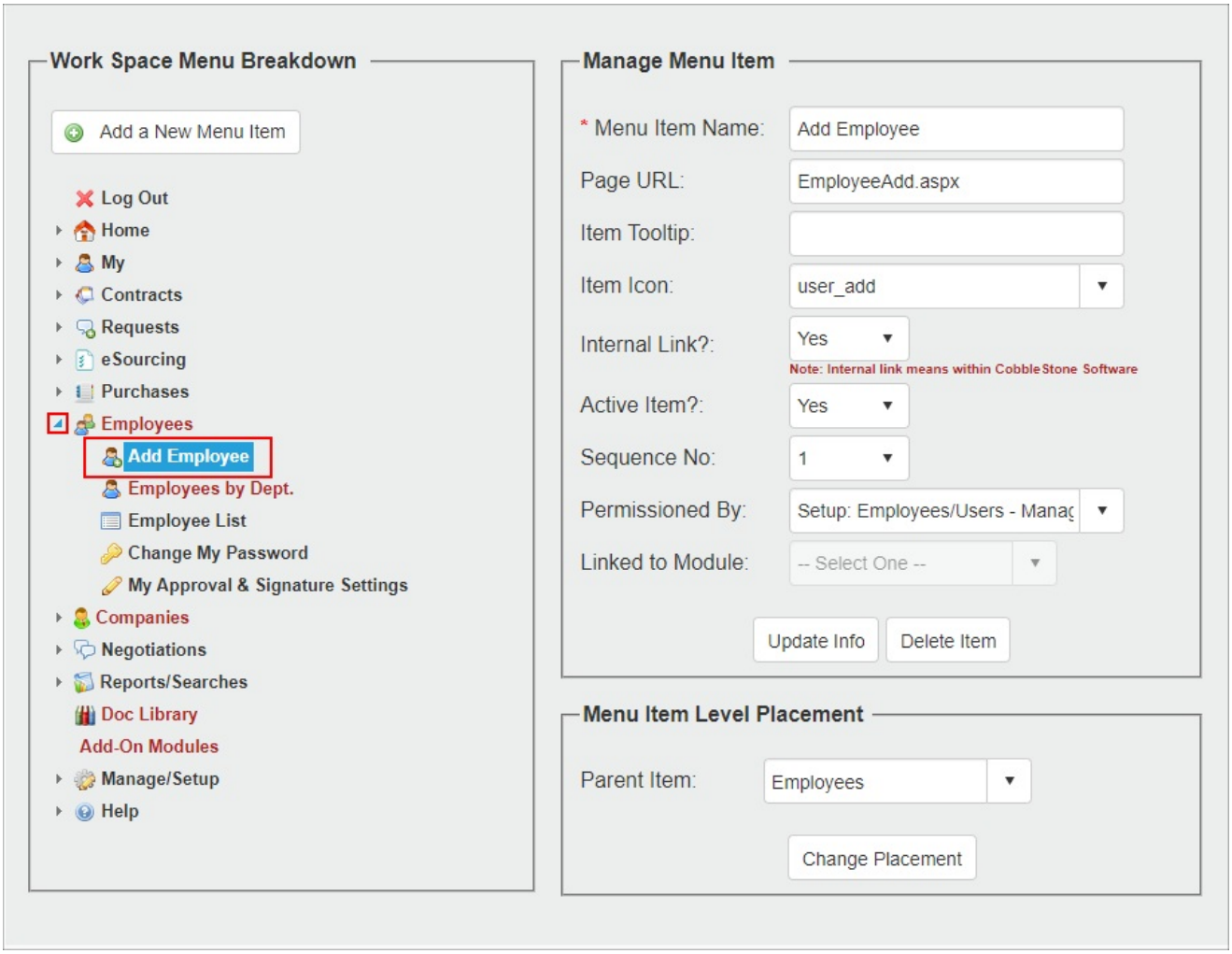


9. Edit the main menu item text, hide or add additional main menu items. Any items that are colored **RED** are hidden. By default, all items will show thus, none will be marked Red.



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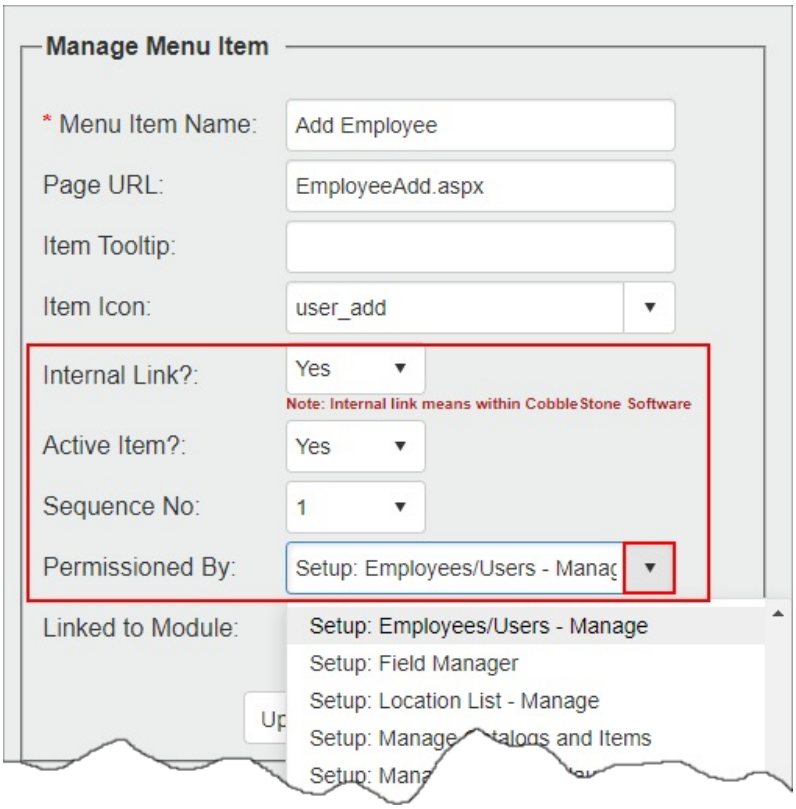
10. To Hide/display an item or make edits to the item text, select the item from the main menu breakdown. Expand the menu item to include sub-menu items by clicking the carat next to the Menu Item Name to modify its sub-menu items.



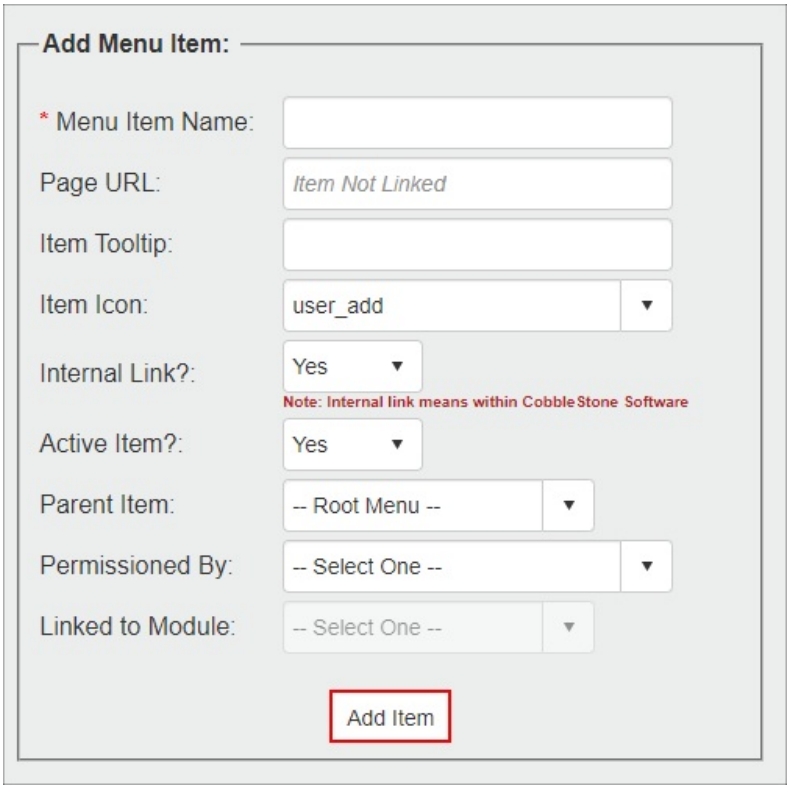
11. On this page an admin user can alter the **Menu Item Name**, establish a mouse-over tool-tip, choose an **Item Icon** (or no icon), Make the item **Active** (or not), modify the **Sequence Number** (where it displays on the top menu), and set the menu item to be **Permissioned By** a specific system, custom permission, or no permission. The menu item can be moved to a completely different menu header, **Parent Item**, if needed.

12. If Managing a Menu Item, be sure to click **Update Info**. If altering the Parent Item, be sure to click **Change Placement**.

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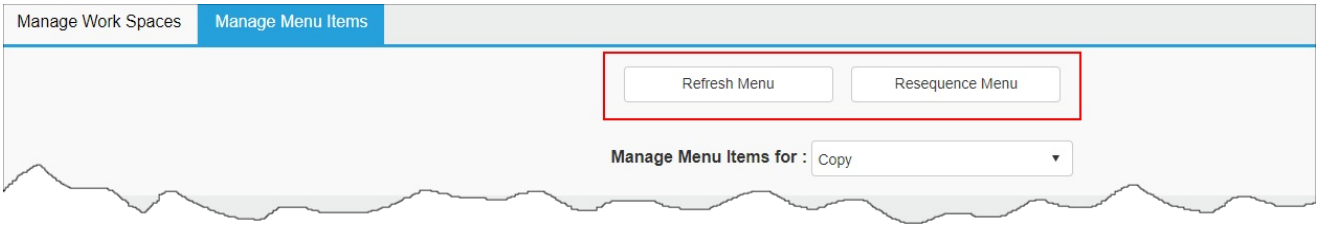


13. If creating a new menu item, specify if the URL is an internal link, (In case you want to pin a report on the menu or another Contract Insight link, or if it is an external link (If you wanted to pin a link to an external web site). Then provide the **Page URL** as necessary. Provide no URL if creating a folder for menu items. Be sure to click **Add Item** for when done configuring the new menu item.



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14. When done making menu changes, click and/or as appropriate.



Note: See the Manage Main Menu: Core Application Menus page for more details.

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Manage Main Menu: Core Application Menus

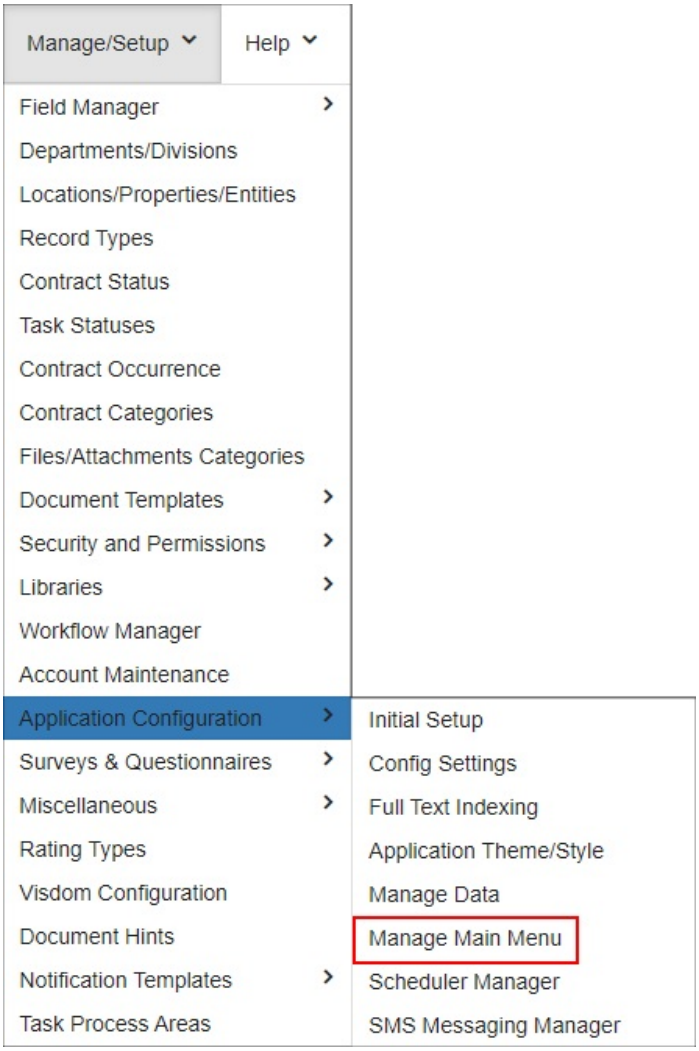
Manage Main Menu: Core Application Menu(s)

App Config: Manage Main Menu

Contract Insight allows authorized and licensed users with Administrative permissions to customize the top navigation menu to display icons as well as alter the menu names, accessibility, and location of the menus.

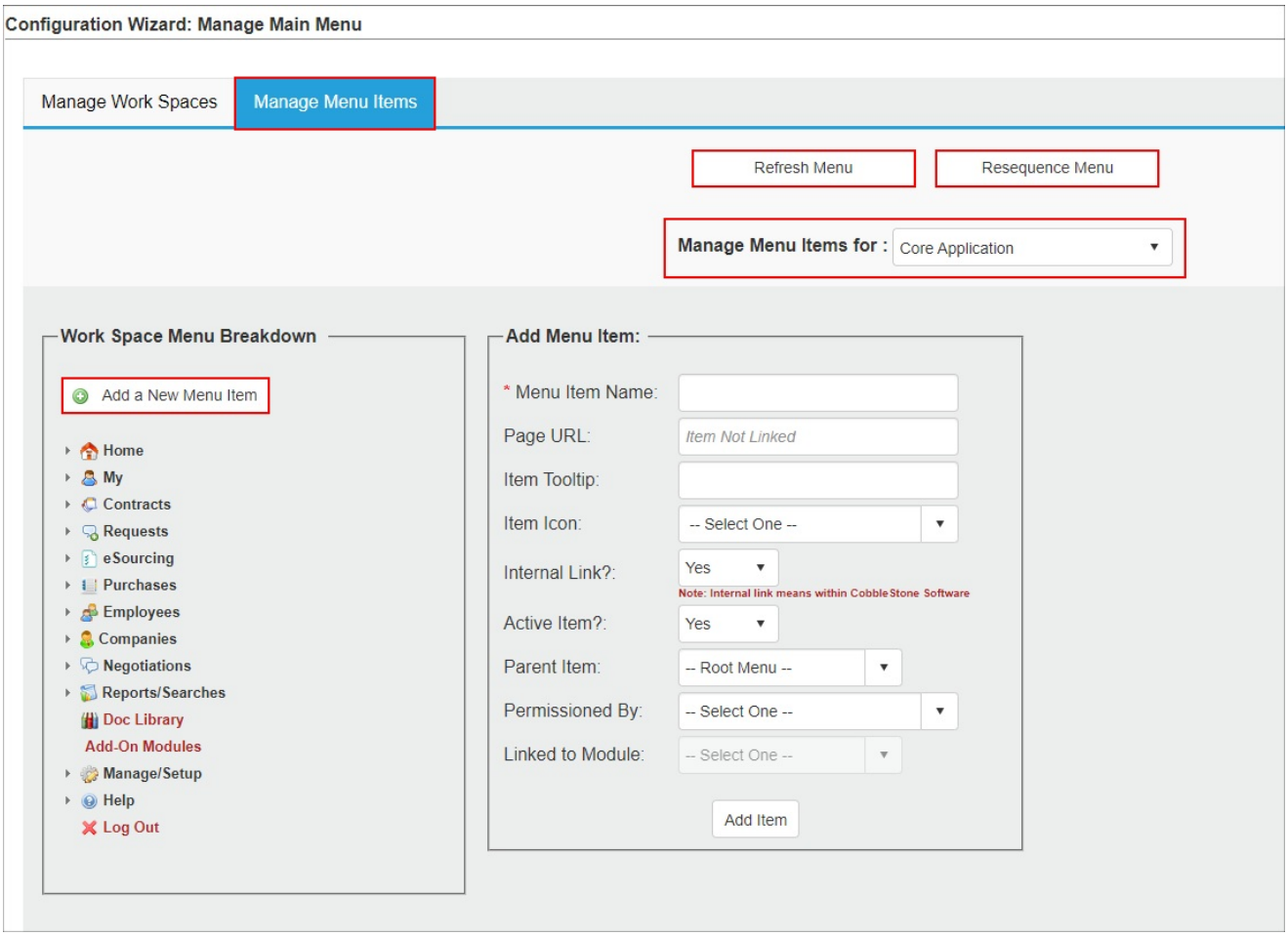
Accessing the Menus

1. To customize the items of the top navigation menu, go to **Manage/Setup** > **Application Configuration**> **Manage Main Menu**.



2. The **Configuration Wizard: Manage Main Menu** screen displays. Click **Manage Menu Items**.

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3. Select the desired work space menu via the **Manage Menu Items for** pick-list.

The Menu Editor

There are four main sections of the screen:

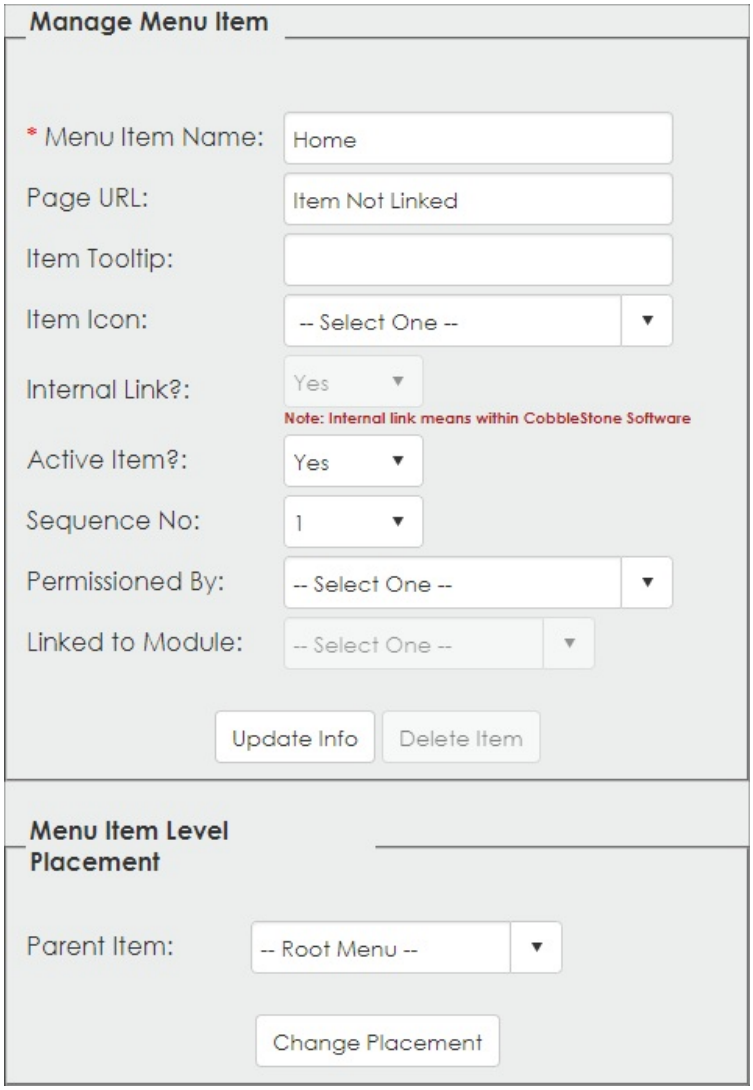
1. Main Menu Breakdown

- Click the **carat** to the left of the menu title to display a list of sub-menus that are contained within.
- Select the **menu** or **sub-menu name** to show the menu item's details in the **Manage Menu Item Info** section of the screen.
- Click **Add Menu Item** to add a new menu item.

2. Manage Menu Item Info

- **Item Text**: The menu's name as it will appear in the navigation menu.
- **Page URL**: Where the page is located (if this is a system page, the 'Page URL' is not customization).
- **Item Icon**: Select an icon to be displayed to the left of the menu name in the navigation menu (optional).
- **Active Item?**: Determines whether the menu item will appear in the menu.
- **Sequence No.**: The order in which the menus will appear in each grouping.
- **Permissioned By**: For system-managed items only.
- **Linked to Module**: For system-managed items only.

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Click **Update Info** to save the changes you have made.

3. Manage Menu Item Placement

Parent Item: Shows the menu item directly above the selected item in the main menu hierarchy (i.e. **My Dashboards** is contained in the **Home** main menu item).

- All menu items can have their parent item customized/changed to any other menu item in the main menu hierarchy by selecting the name in the drop down box and clicking **Change Placement**.
- When a menu item has it's parent item modified, its sequence number will automatically be updated to the last number in the sequence list for the new parent item.

Upload a New Icon

Allows users to upload personalized icons to be selected in the **Item Icon** drop down in the **Manage Menu Item Info** section of the page. (see the Image Library Wiki page for more information)

Note: Uploaded icons should be 16 pixels x 16 pixels (the default size of icons).

Refresh Menu/Resequence the Menu

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- Once any changes have been made to the menu, be sure to click **Refresh Menu** at the top of the **Manage Main Menu** screen.
- To re-sequence the order in which the menus display, click **Resequence Menu** at the top of the **Manage Main Menu** screen.

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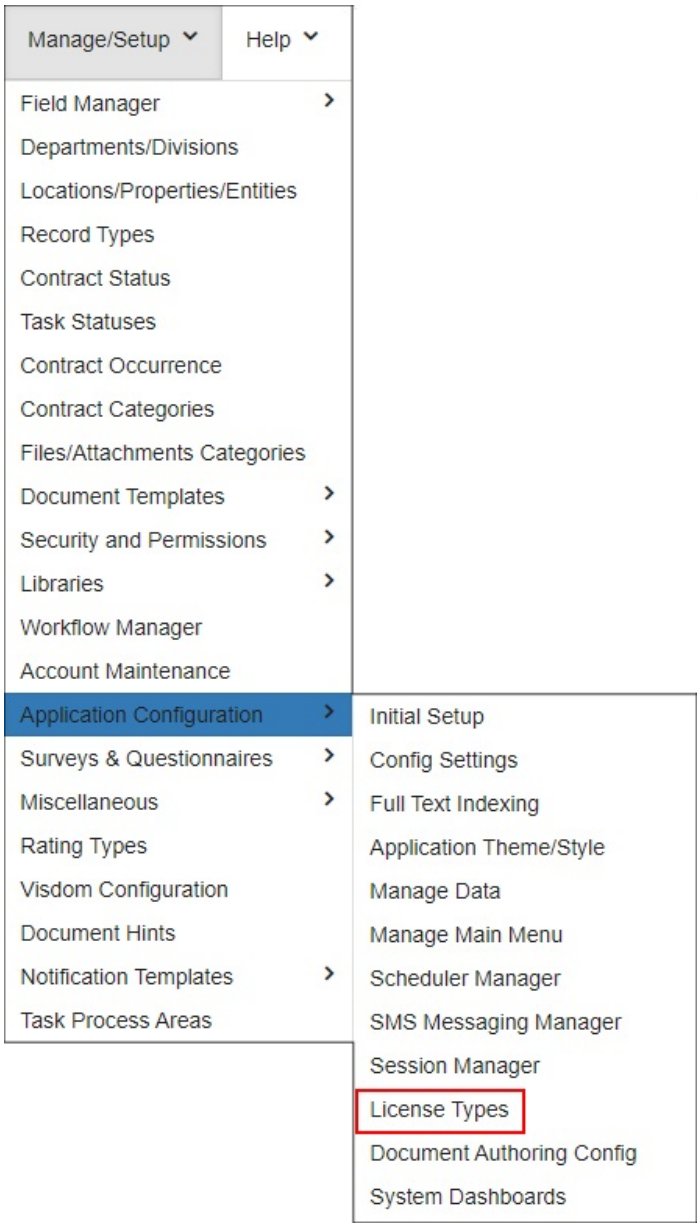
Manage License Types

Manage License Types

AppConfig: Manage License Types

The **Configuration Management: Manage Employee License Types** screen provides an overview and breakdown of employees assigned to each of the license types (Admin, Super, Standard, and Read Only).

From the **Manage/Setup** top menu item, select **Application Configuration** > **License Types**.

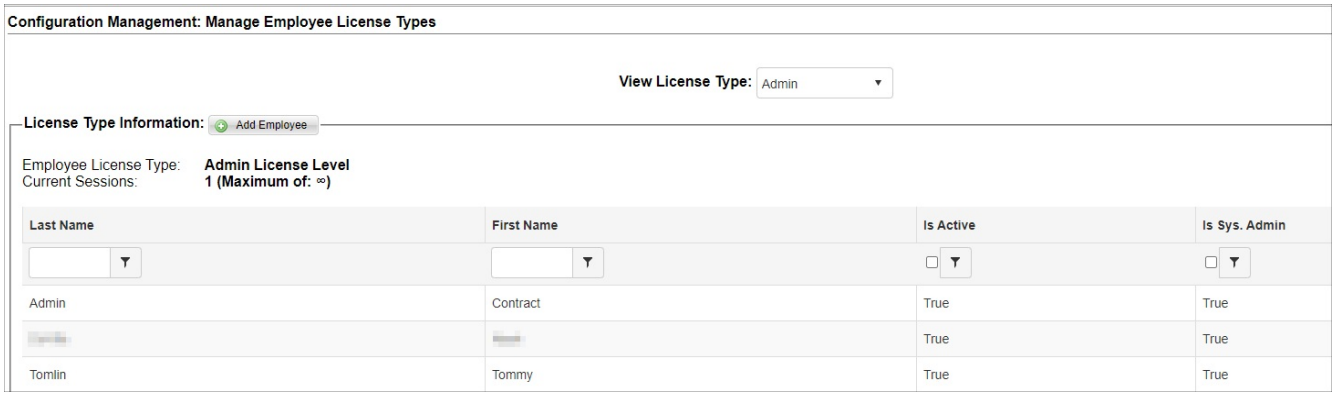


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Note: This is only available for **Enhanced/Leveled Licenses**. For detailed information on the differences between Legacy and Enhanced licenses, please contact CobbleStone Systems.

License Type Selection

Each of the four (4) license types are provided in the **View License Type** drop down box at the top of the page. By selecting one of the types, the **License Type Information** area is populated.



License Type Information

The **License Type Information** area provides the name of the selected license type as well as the current active sessions/employees and the maximum number of sessions/employees that can be actively logged in for that license type.

In addition, a grid showing the basic details for all employees assigned to the selected license type is provided. The employee's **Last Name** and **First Name** are displayed along with whether the employee **Is Active** and if the employee **Is a Sys. Admin** (System Administrator).

Further details and management capabilities for this information can be performed by clicking **Manage Employees** in the **Data Management** area on the side menu, or by clicking **Add New Employee** next to **License Type Information**.



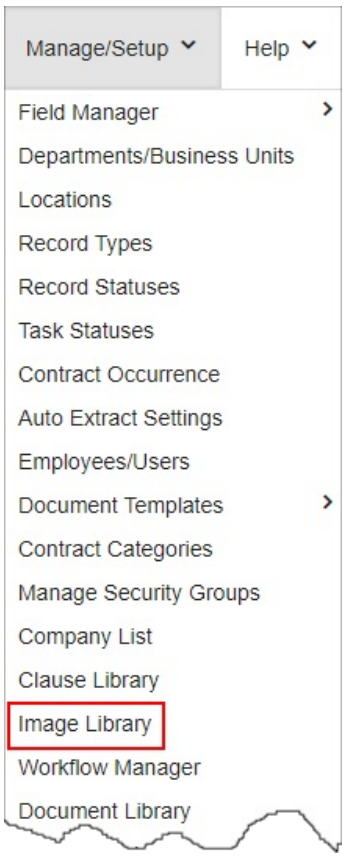
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Image Library

Image Library

Contract Insight provides an **Image Library** that acts as a repository for images that can be used in the **Main Menu**, **Application Configuration** settings (for settings that have a value of "Rich Content...click 'Modify' to view"), **Document Images** for **Document Authoring, AdHoc Report Help Text** (on dashboards) and the **Login screen** as a background.

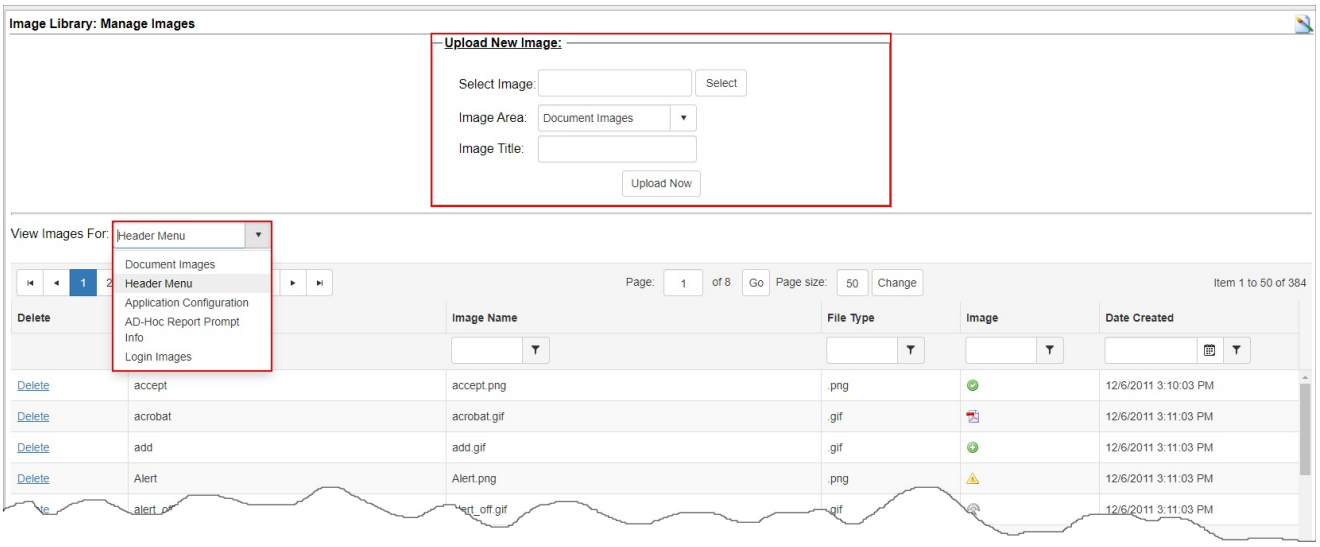
To access the Image Library, go to the **Manage/Setup** top navigation menu item and select **Image Library**.



Doing so will take you to the **Image Library: Manage Items** screen where you can upload, manage, and delete images used for the various available areas.

To Upload a New Image:

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1. Click **Select** to browse your computer for the image you would like to upload.

2. Once you have selected the image, select which area you would like to store the image in using the **Image Area** drop down menu.

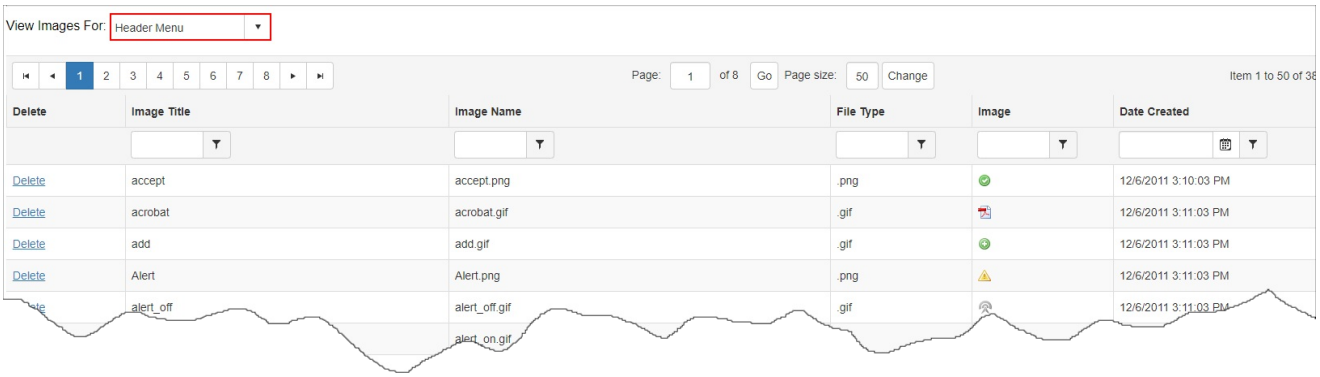
The Image Areas are Used for:

- **Document Images:** Document Authoring by way of the Document Builder
- **Header Menu:** Main Navigation Menu icons
- **Application Configuration:** Settings in the Application Configuration groups that have Rich Content...click 'Modify' to view and for email.
- **Ad-Hoc Report Prompt Info:** Ad-Hoc Report help text when viewed from a dashboard
- **Login Images:** Login Screen background image(s) that cycle.

3. Next, enter a title for the image in the **Image Title** text box.

4. Click **Upload Now** to upload and save the image to the Image Library in the selected area.

To View Images you have uploaded:



1. From the **View Images For** drop down menu, select the area you would like to view.

2. Once you have selected an area, all images stored in that area will be displayed.

3. To delete an image from the Image Library, click **Delete** to the left of that line item.

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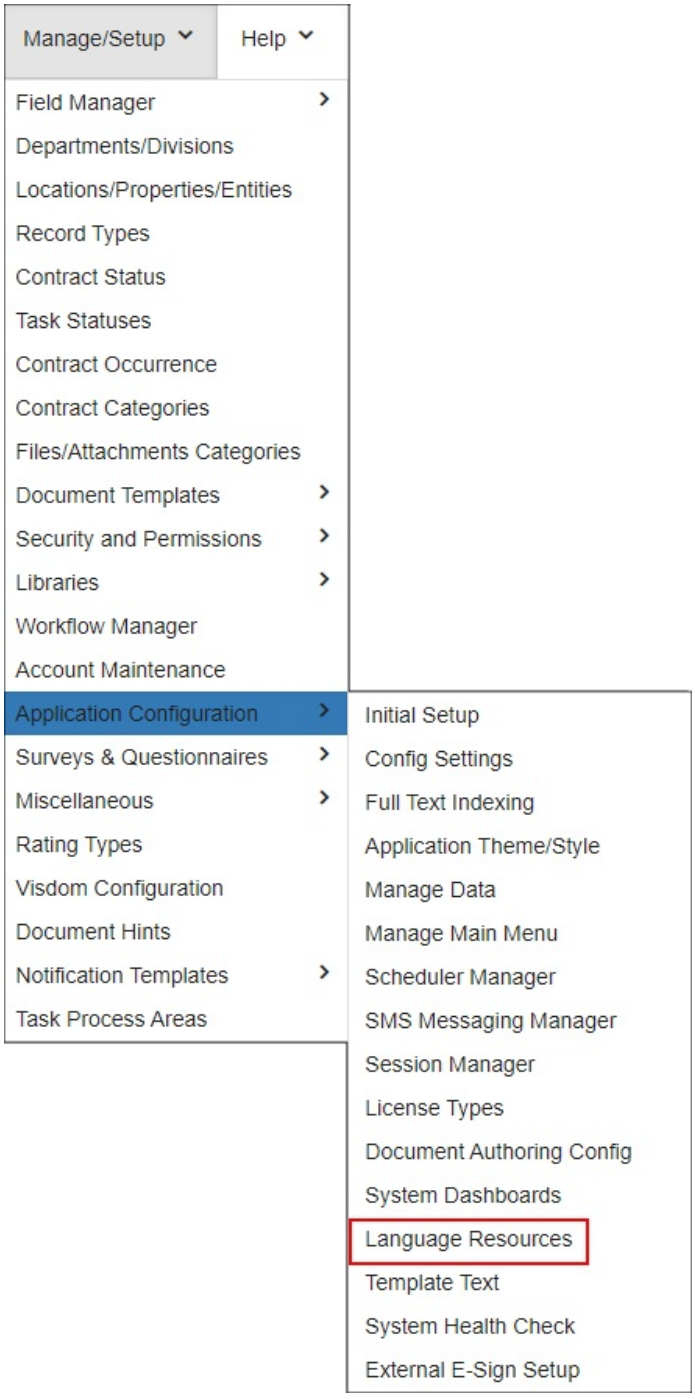
Language Resources

Language Resources

Language Resources

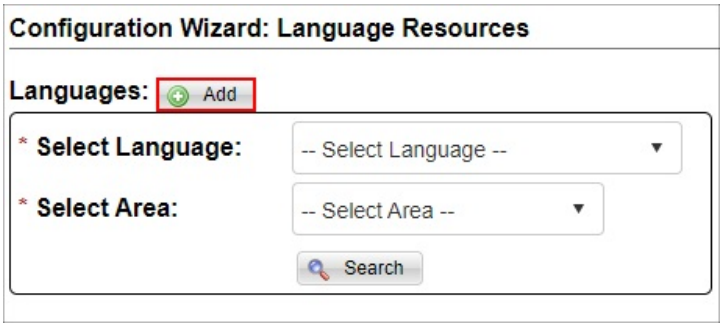
Language Resources can be accessed by navigating to:

Manage/Setup > Application Configuration > Language Resources

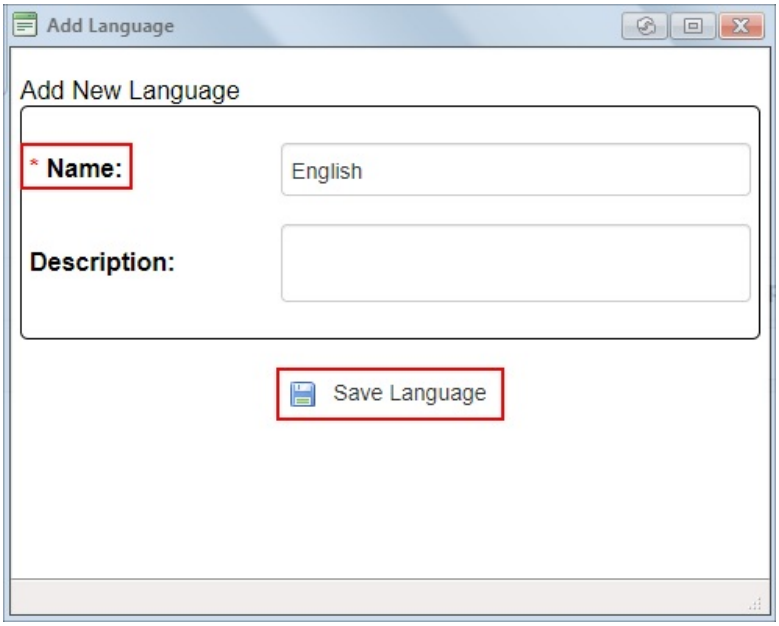


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Click **Add** to add a new Language to be used in Contract Insight.



Type in the name of the new Language and click **Save Language**.



Select the new Language via the **Select Language** menu.

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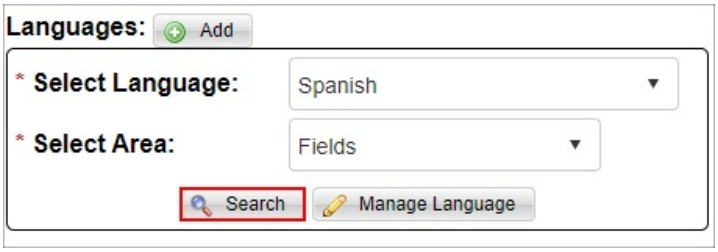


Next, select the Area which to apply the new Language and click **Search**.



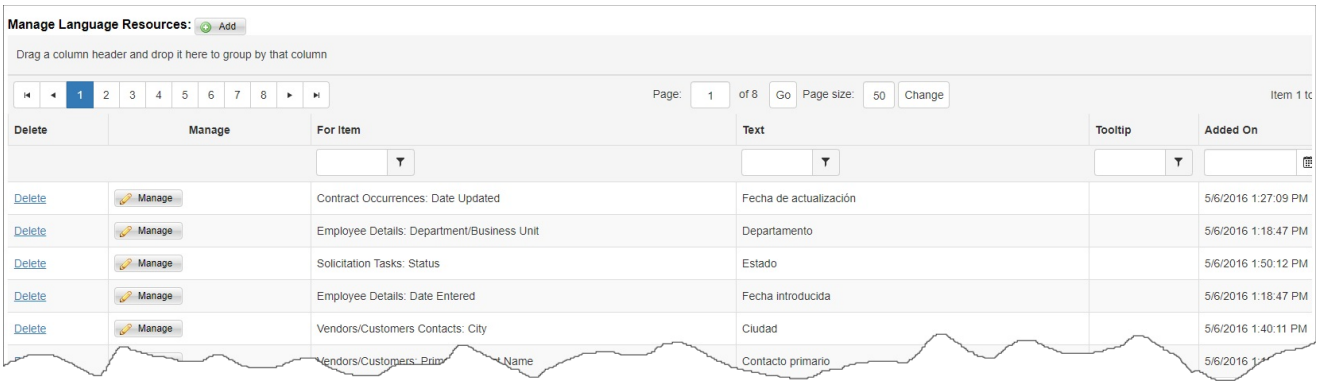
Fields: Selecting this allows users to provide translations for the various fields throughout the system.

Top Menu: Selecting this allows users to provide translations for the Top Menu items, menu items running along the top of the Contract Insight system.

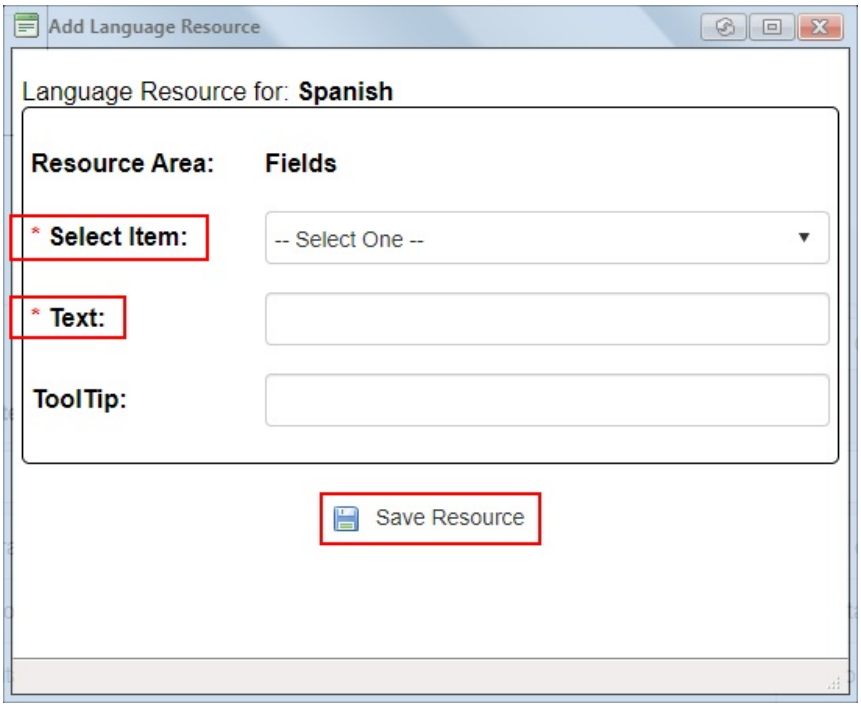


After clicking the **Search**, you will see any existing translations for the associated Area (in this example, we are using the **Fields** Area). Click **Add** to add a new translation.

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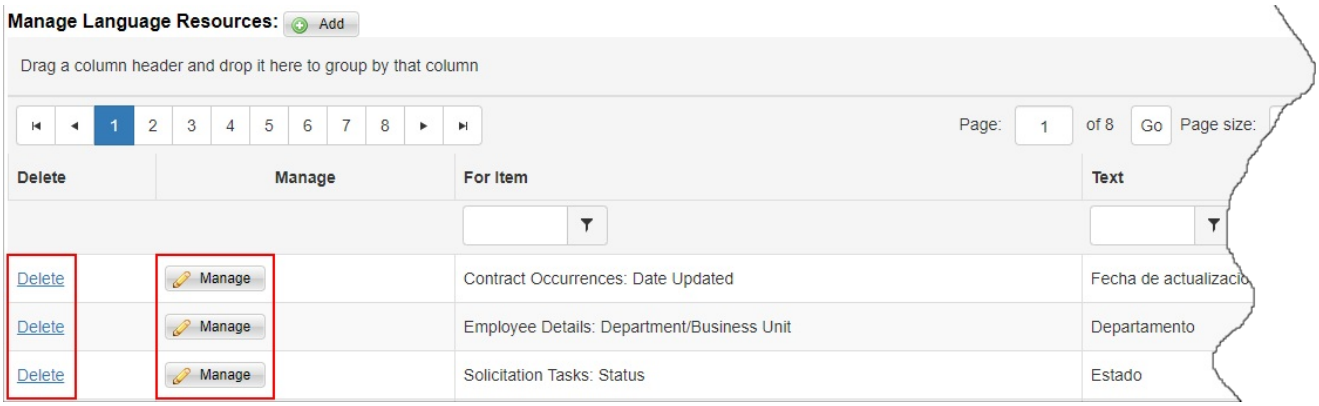


Select the field for which you are providing a translation, type in the translation text, and then click **Save Resource**. We recommend avoiding special characters.

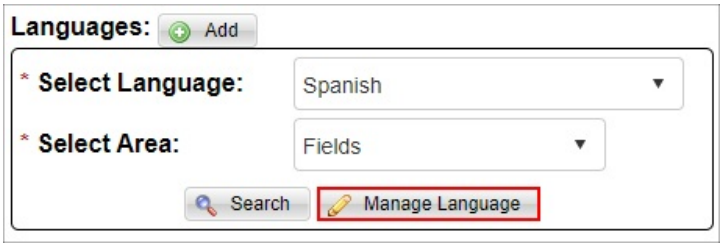


Click **Delete** to delete a translation or click **Manage** to edit it.

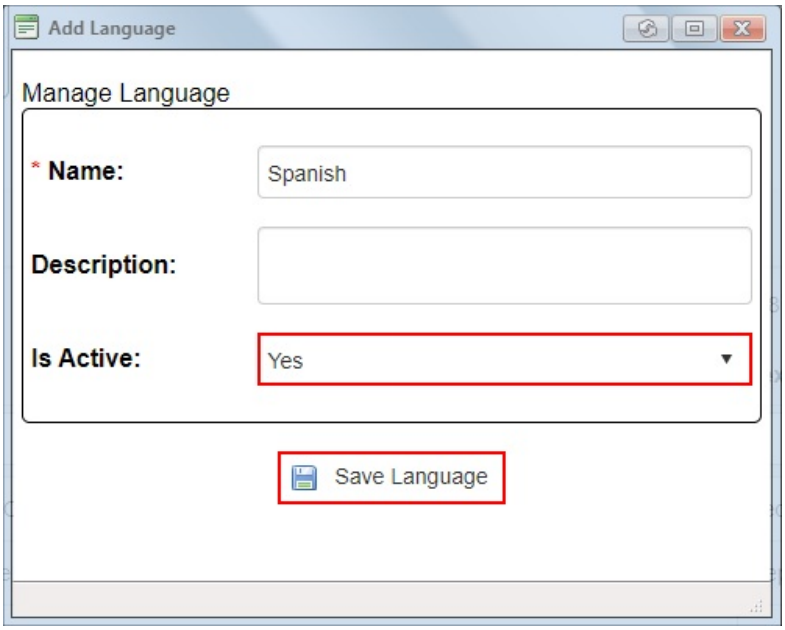
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After clicking **Search**, the **Manage Language** will appear.



This will allow a user to change the Language name, apply a Description, and/or change its **Is Active** value. To no longer have the Language to appear as an option, set its **Is Active** value to **No**, and then click **Save Language**.



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After completing the configuration for a new Language, apply the Language to an Employee using the **Language** field on their **Employee Record**.

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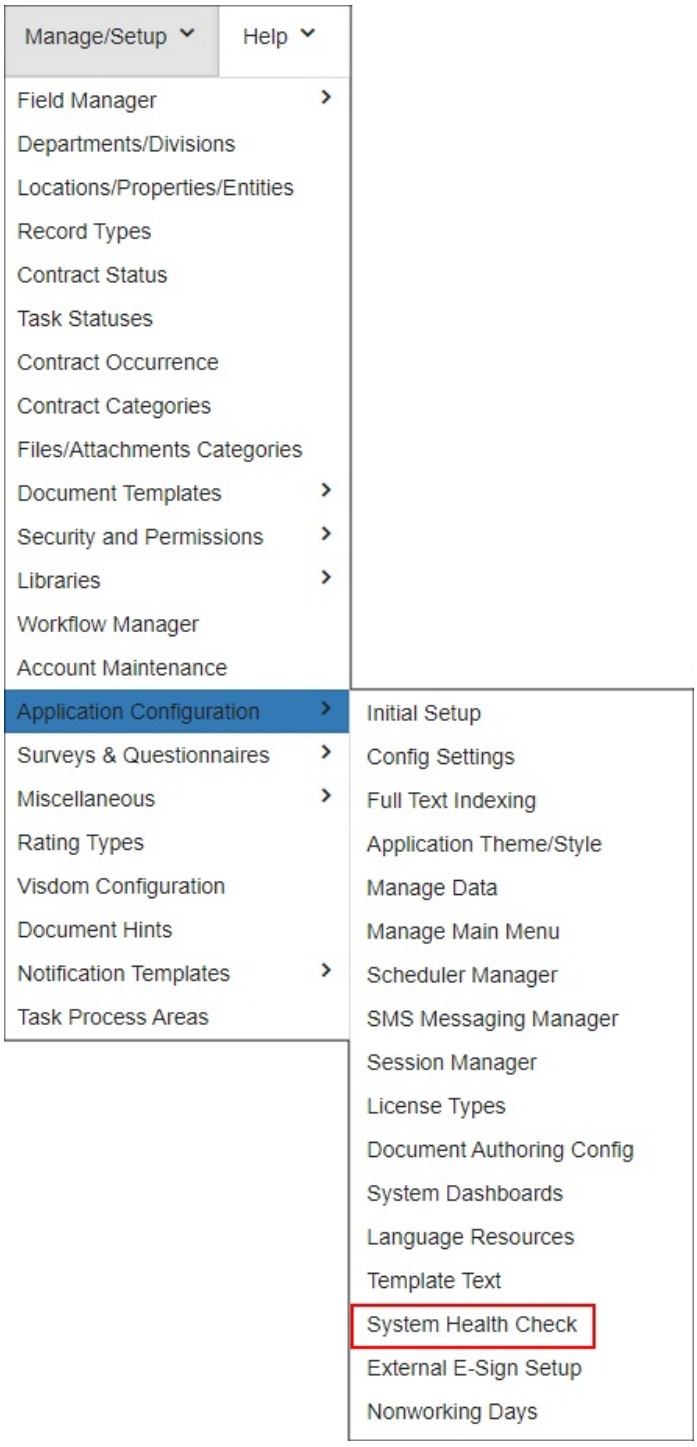
System Health Check

System Health Check

AppConfig: System Health Check

The System Health Check page allows users to look into various areas of the system, particularly regarding how removing fields and records can sometimes cause problems in other areas. It is accessed by navigating to: **Manage/Setup** > **Application Configuration** > **System Health Check**.

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Record Counts: Displays the general count of how many records are present in the various areas of the system.

Employees/Users with Managers Assigned To Missing Employees: Detail any Employees who had a Manager assigned but had the Manager deleted before being unassigned.

Employees/Users Active with No Permissions Set via +Permissions: Detail any Employees who are set to **Active**, but have no Permissions assigned, whether Individually or via Security Groups. If an Employee is Active, it implies they would be logging into the System, but they won't be able to do anything without Permissions.

Note: This does not apply to System Admin Users.

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Employees/Users assigned to Departments but Department is now Missing: Detail any Employees that had a Department assigned, but the Department was then deleted before being unassigned.

Workflows with Tasks Escalating to Missing Employees: Detail any Workflows that have Tasks escalating to an Employee, but that Employee was then deleted.

Workflows with Tasks Assigned to Missing Employees: Detail any Workflows that have Tasks assigned to an Employee, but that Employee was then deleted.

Workflows conditions With Fields Condition Issues: Detail any Workflows that have Field Conditions which would cause issues.

Ad Hoc Reports with Fields that were Deleted from Field Manager: Detail any Ad-Hoc Reports that have fields assigned, but the field(s) was then deleted before being unassigned.

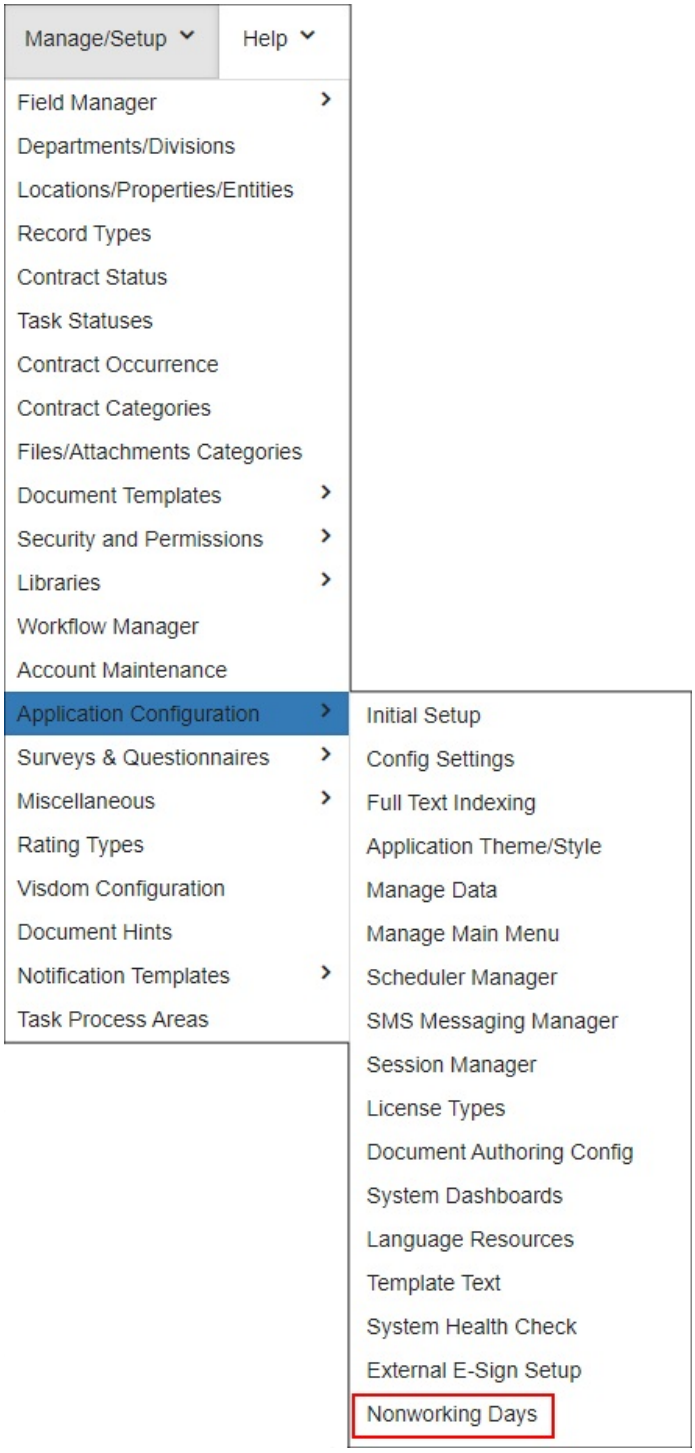
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Nonworking Days

Nonworking Days

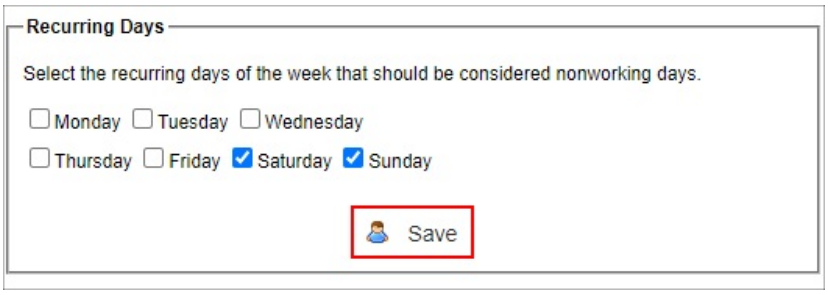
AppConfig: Nonworking Days

Nonworking Days tie into **Workflow Configuration**, so you can determine days on which automatically generated Task Alerts will **not** fall. To manage Nonworking Days, navigate to **Manage/Setup** > **Application Configuration** > **Nonworking Days**.

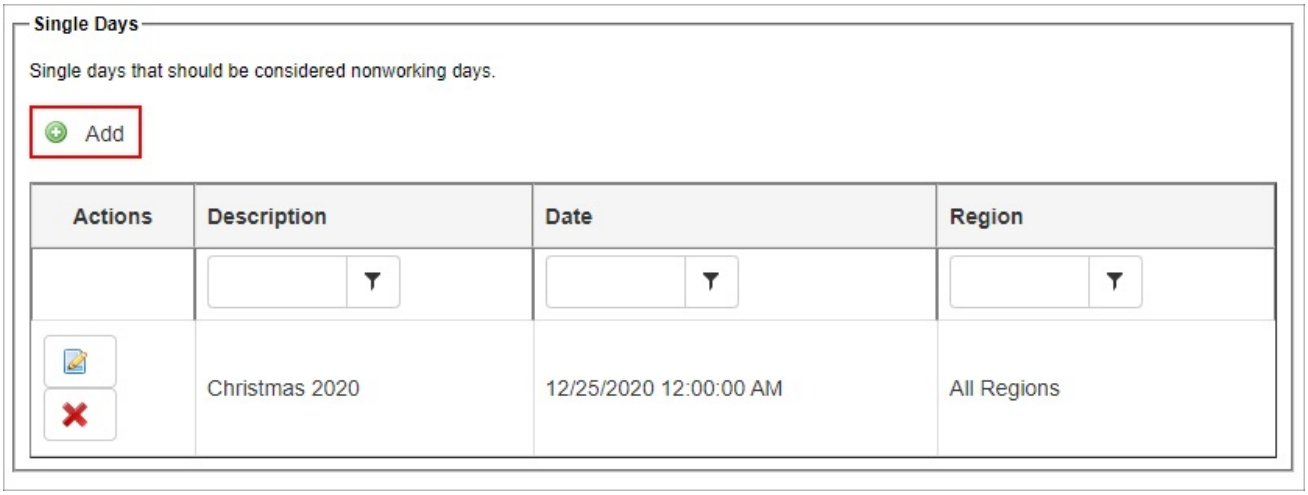


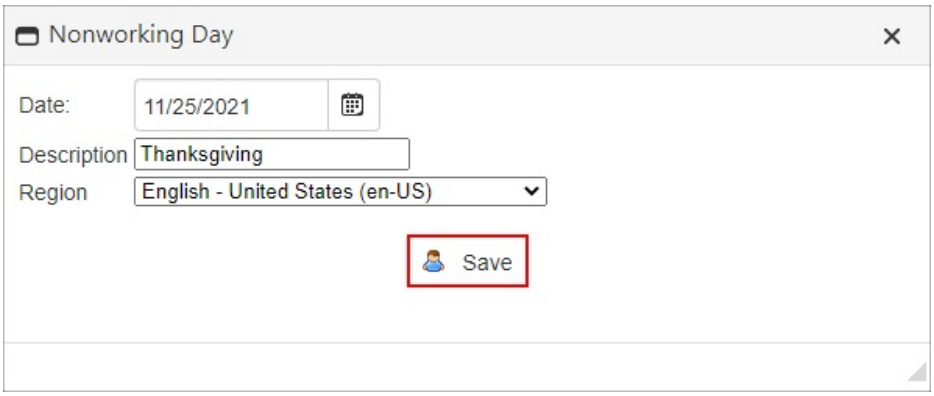
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Use **Recurring Days** to specify which days of the week are always considered Nonworking Days. Mark the tick boxes for those days and click **Save**.



The **Single Days** area allows a system admin to specify a single day that is to be considered a Nonworking Day. Click **Add** to bring up the associated pop up, then specify the **Date**, **Description**, and **Region**. If a single Region is selected, the Nonworking Day will only apply to Employees assigned to that Region. When finished, click **Save**.





The page reload with the new Nonworking Day. Click **Edit** to modify it or **Delete** to remove it.

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	Thanksgiving	11/25/2021 12:00:00 AM	English - United States (en-US)

Note: Single Days are truly Single Days. For example, after the displayed Thanksgiving passes, a User can Edit it to have it apply for the following year. A User could also set up years of Thanksgiving's in advance.

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IP Address Restrictions

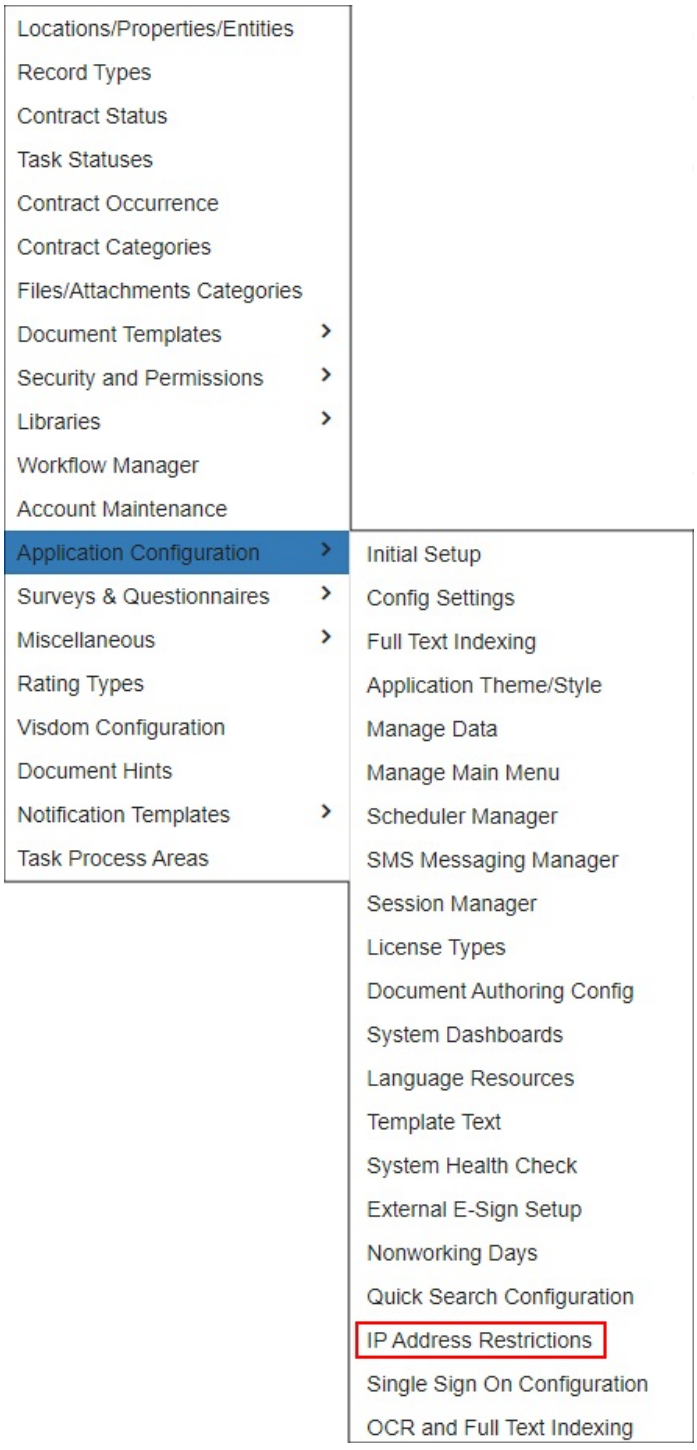
IP Address Restrictions

AppConfig: IP Address Restrictions

To manage **IP Address Restrictions**, navigate to **Manage/Setup > Application Configuration > IP Address Restrictions**.



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The **Restrictions Status** drop down determines whether or not IP Address Restrictions are being applied. It cannot be set to Enabled until IP Address Restrictions are specified.

The Restrictions Mode dropdown determines how the restrictions are applied.

- **Only ALLOW Specified IPs:** The designated IP Addresses will be the only ones allowed to access your Contract Insight system.
- **Only DENY Specified IPs:** The designated IP Addresses will be the only ones explicitly restricted from accessing your Contract Insight system.

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Click **Add** to add an IP Address Range. Optionally, provide a **Title/Description** for the IP Address Range, as well as specify if it is Inactive. Inactive IP Address Ranges will not be able to apply unless made Active again.

After an IP Address Range is added, click **Manage** to edit its details or click **Delete** to remove it.

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Quick Search Configuration

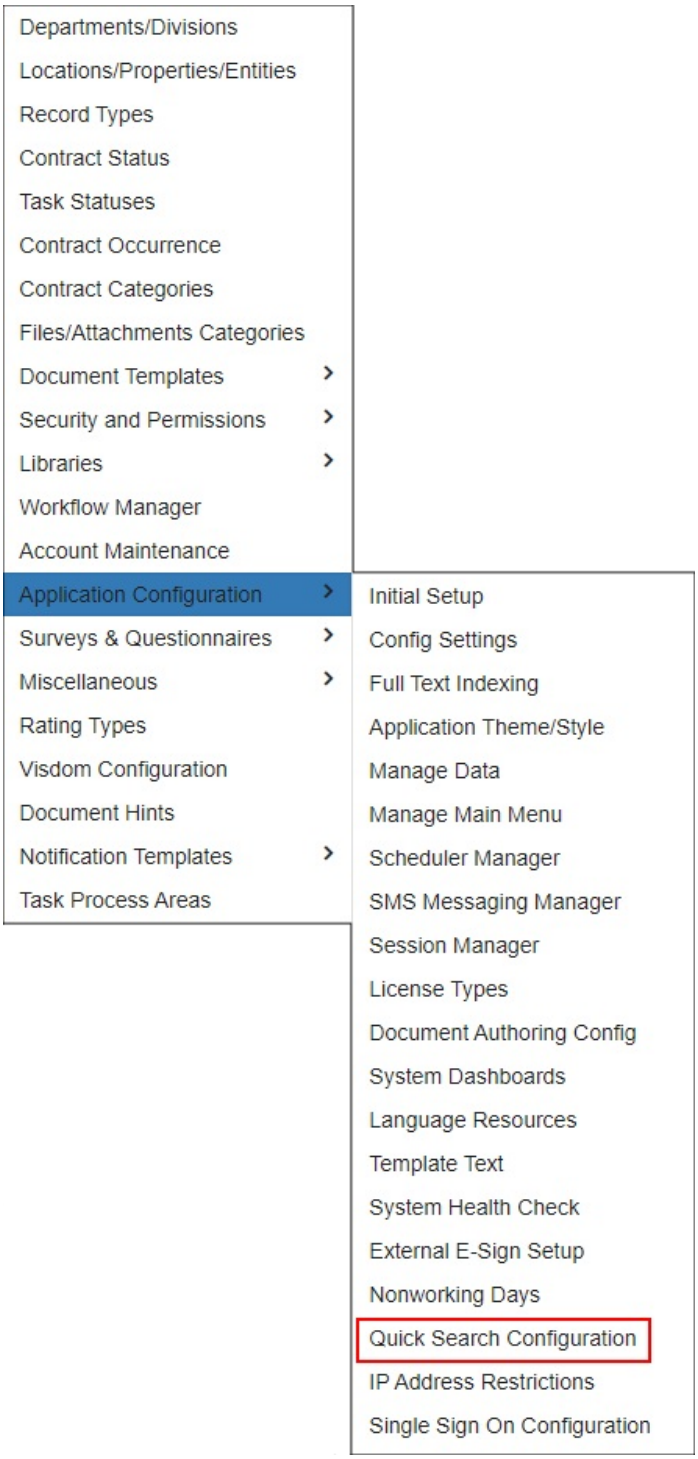
Quick Search Configuration

Searching & Reporting: Quick Search Configuration

Contract Insight allows users to search and report based on any keyword, date, or number in standard and user-defined fields using the **Quick Search** tool. System Administrators have the ability to configure the Quick Search for their users.

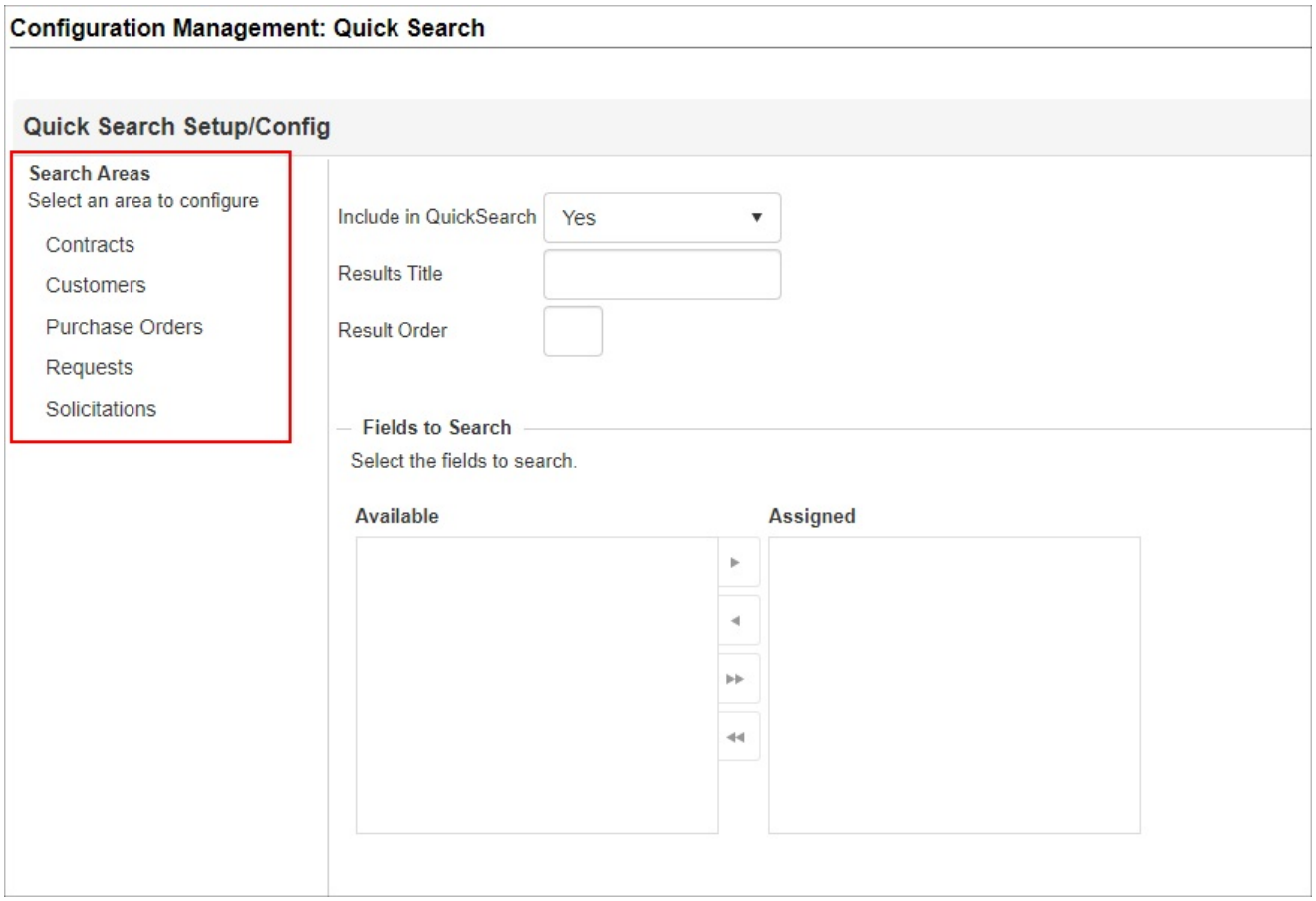
1. Go to the Quick Search Configuration page found under Setup > Application Configuration.

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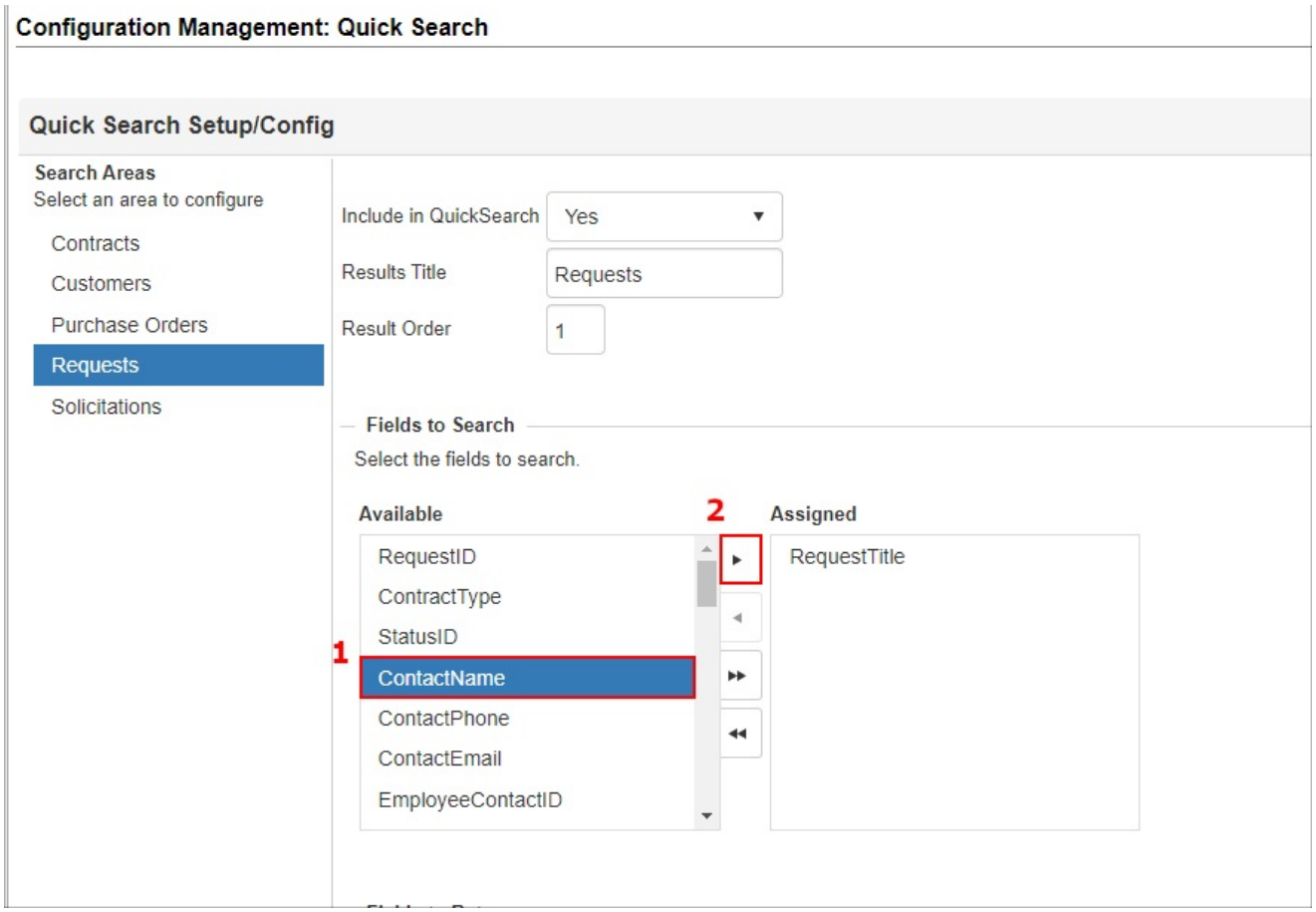
2. Select the Search Area to configure.

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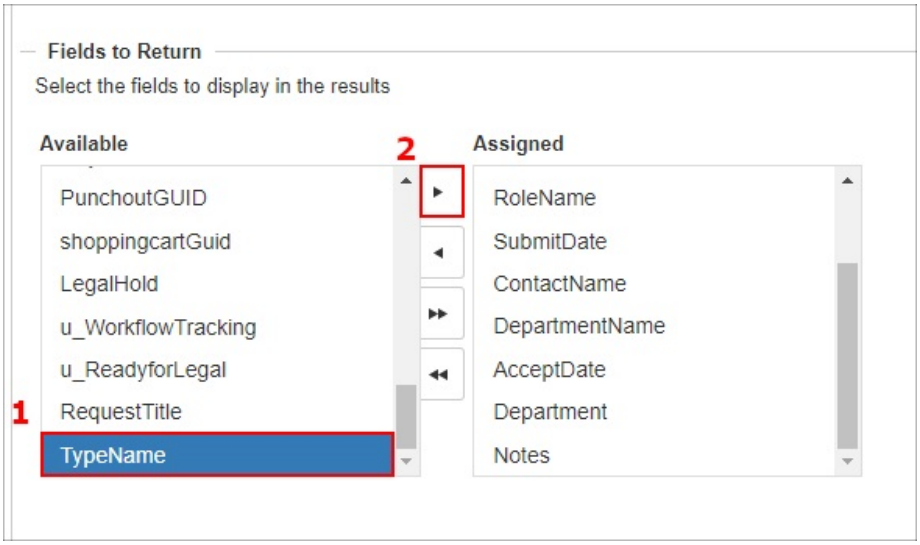


3. Add the Fields to Search by selecting the field from the Available column and clicking the right arrow to move it to the Assigned column.

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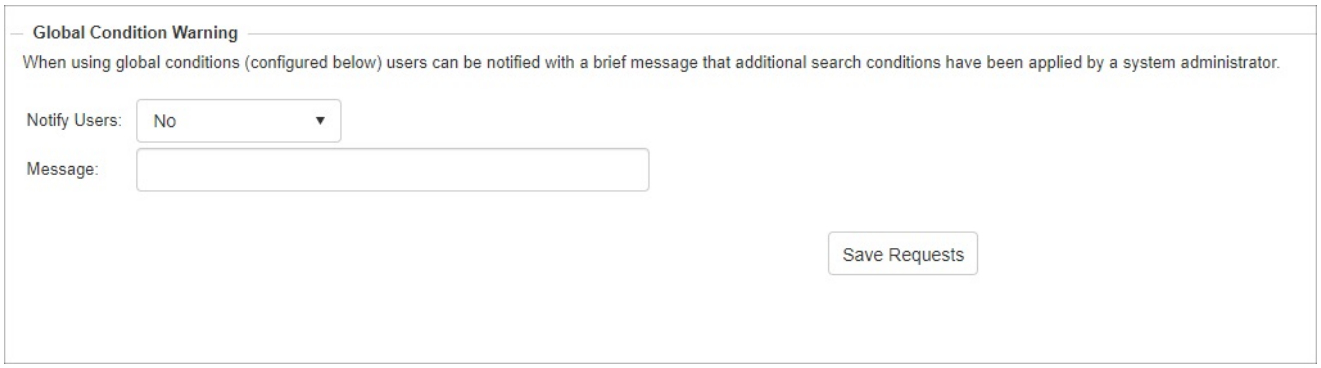


4. Add the Fields to Return by selecting the field from the Available column and clicking the right arrow to move it to the Assigned column.



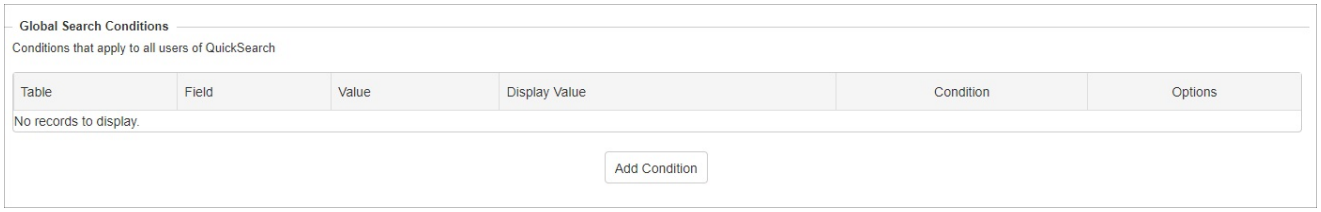
5. Choose if there should be any Global Condition Warning. If entered, click on Save Requests to save.

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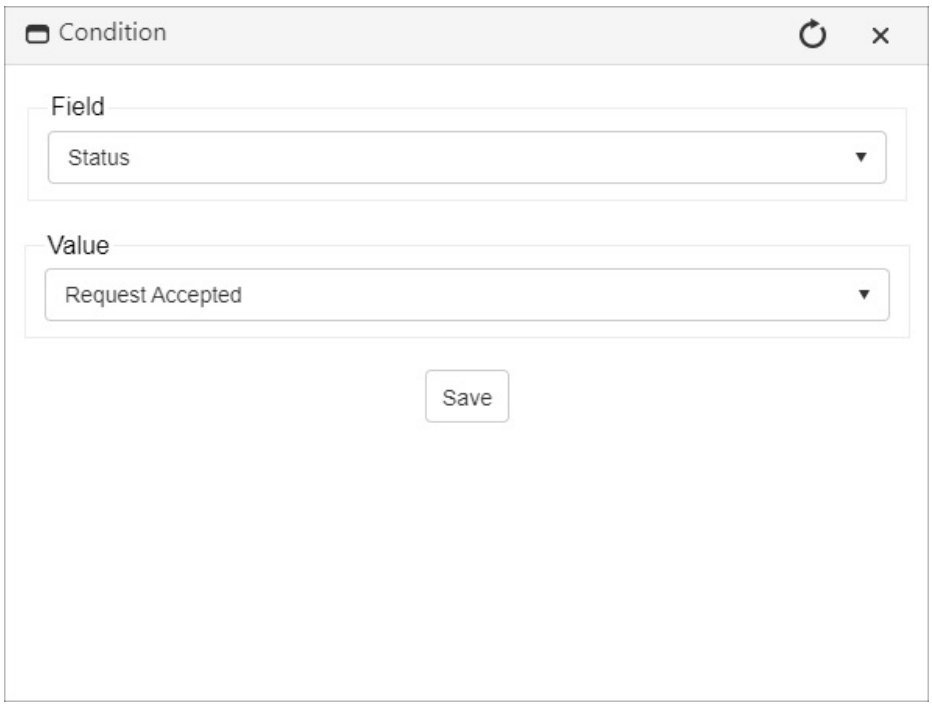


6. If needed, set any Global Search Conditions:

A) Click on Add Condition to set any Global Search Conditions.

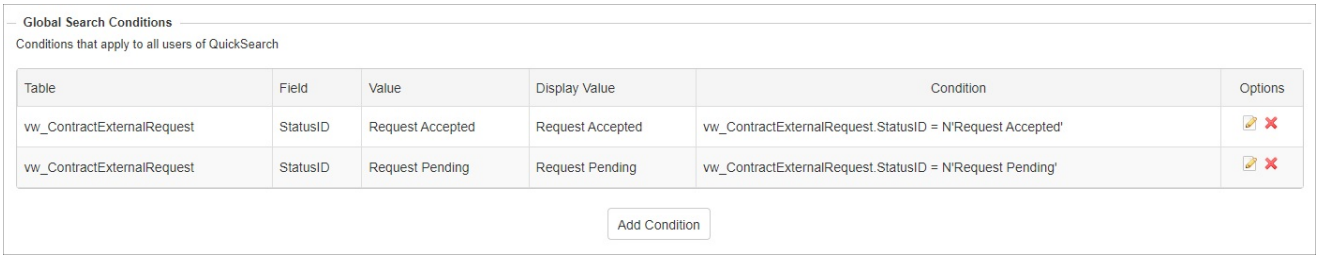


B) Select the Field and Value for the Condition and click on Save.



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C) Repeat as needed to add all of the necessary conditions.



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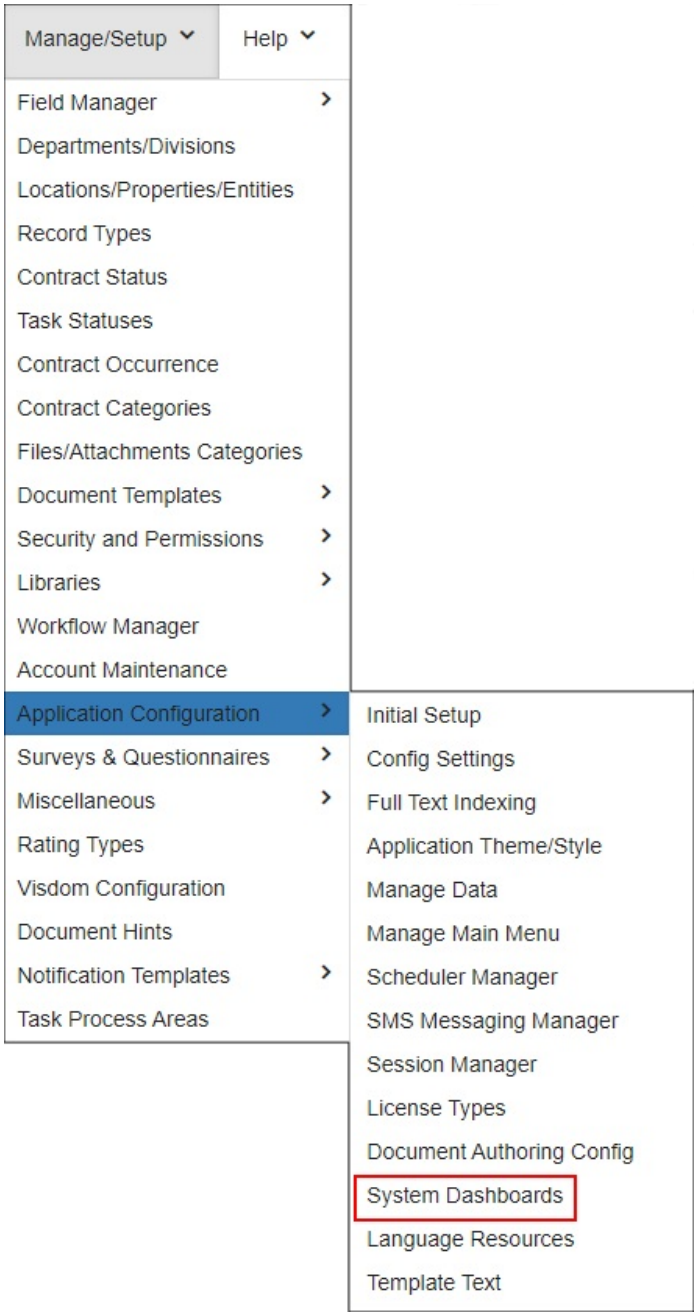
System Dashboards

System Dashboards

AppConfig: System Dashboards

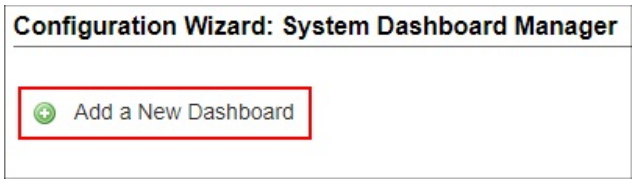
System Dashboards allow system admin users to build and specify Dashboards for users to ensure those users see and have access to reports and other docks created.

To manage **System Dashboards**, navigate to **Manage/Setup** > **Application Configuration** > **System Dashboards**.

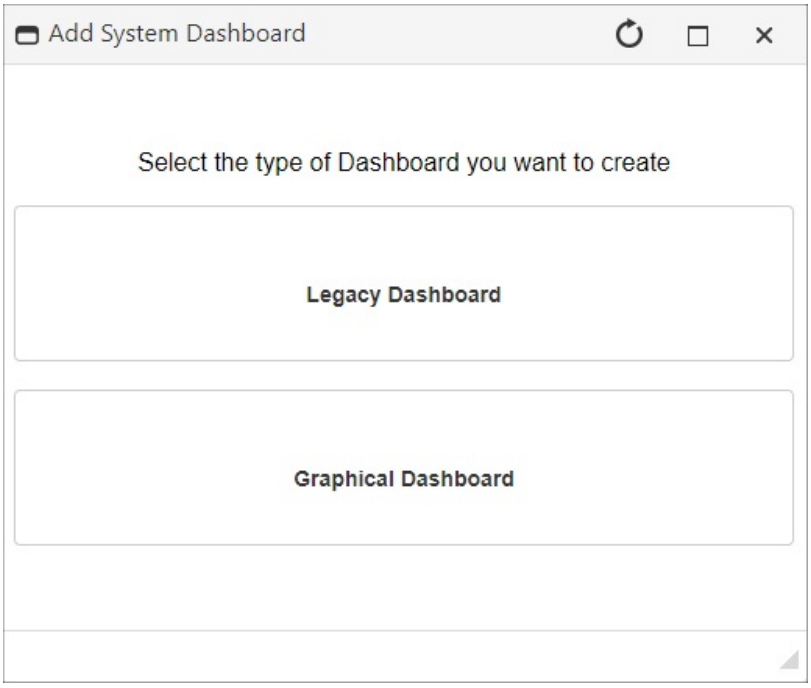


To add a new System Dashboard, click **Add New Dashboard**.

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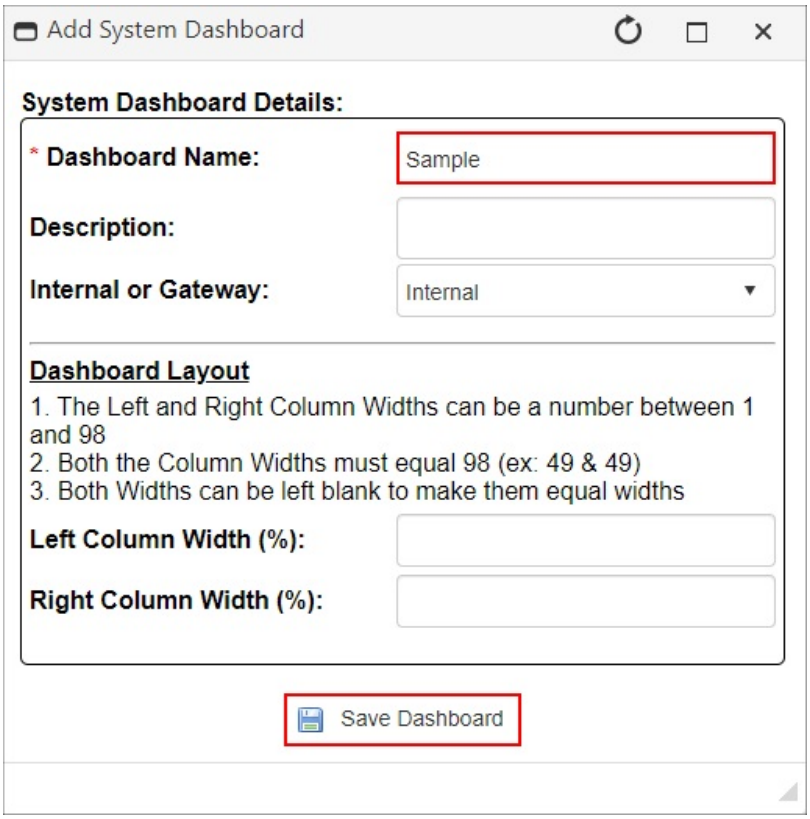
A pop-up window displays. Select the type of dashboard to create, Legacy Dashboard or Graphical Dashboard.



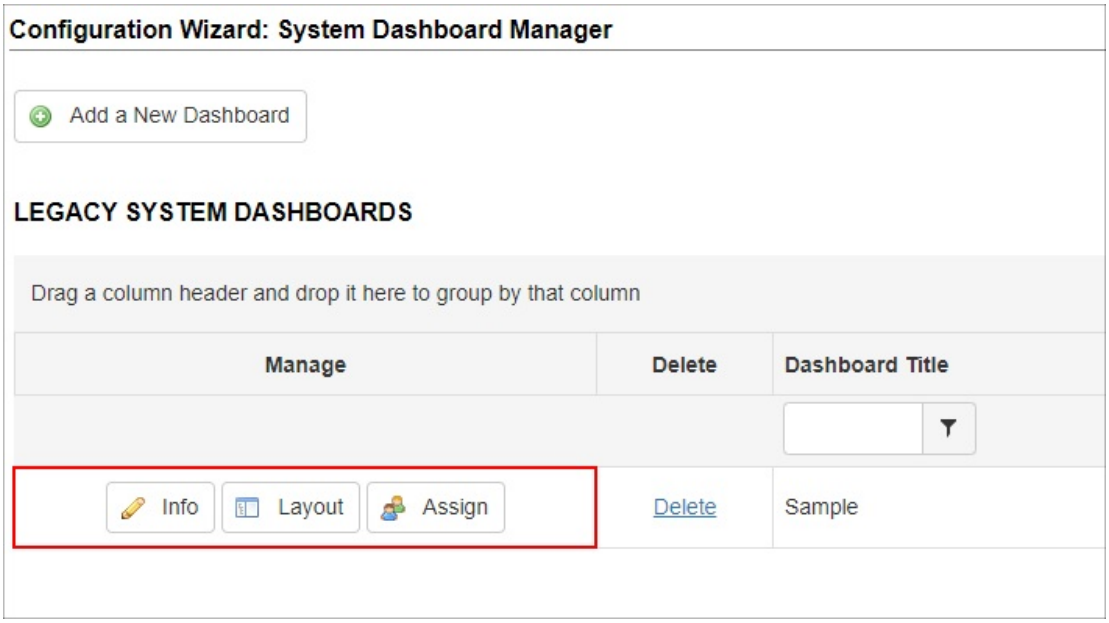
Creating a Legacy Dashboard

Name the System Dashboard and optionally give it a **Description**. To have the Dashboard to be split into two even columns, leave the **Dashboard Layout** section blank. To have the dashboard appear as one full screen column, set the **Left Column Width (%)** to **98**. To have two uneven columns, enter number values needed and ensure they add up to **98**. Click **Save Dashboard** to save the new System Dashboard.

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The page refreshes and the new System Dashboard is added to the list. Click **Info**, **Layout**, or **Assign** to manage the System Dashboard, or click **Delete** to remove it. Clicking **Info** reopens the **System Dashboard Details** screen.



Click **Layout** to open the Dashboard so as to assign **Docks** to it. Click **Add New Dock** to proceed or click **System Dashboards** to go back to the list.

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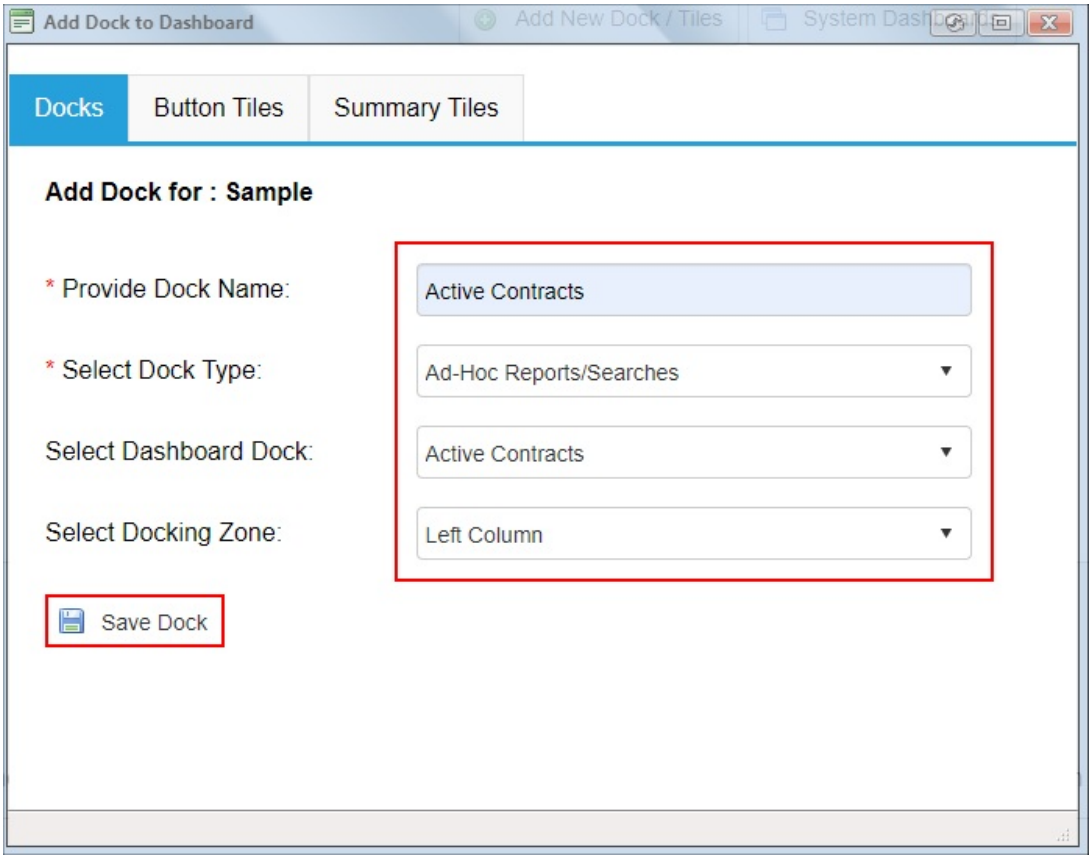


After providing the Dock Name and Dock Type, the window adjusts accordingly. If **Ad-Hoc Reports/Searches** is selected for the **Dock Type**, a drop down appears for the selection the report. If **Web Address is selected,** a text box in which to type in the Web Address appears.

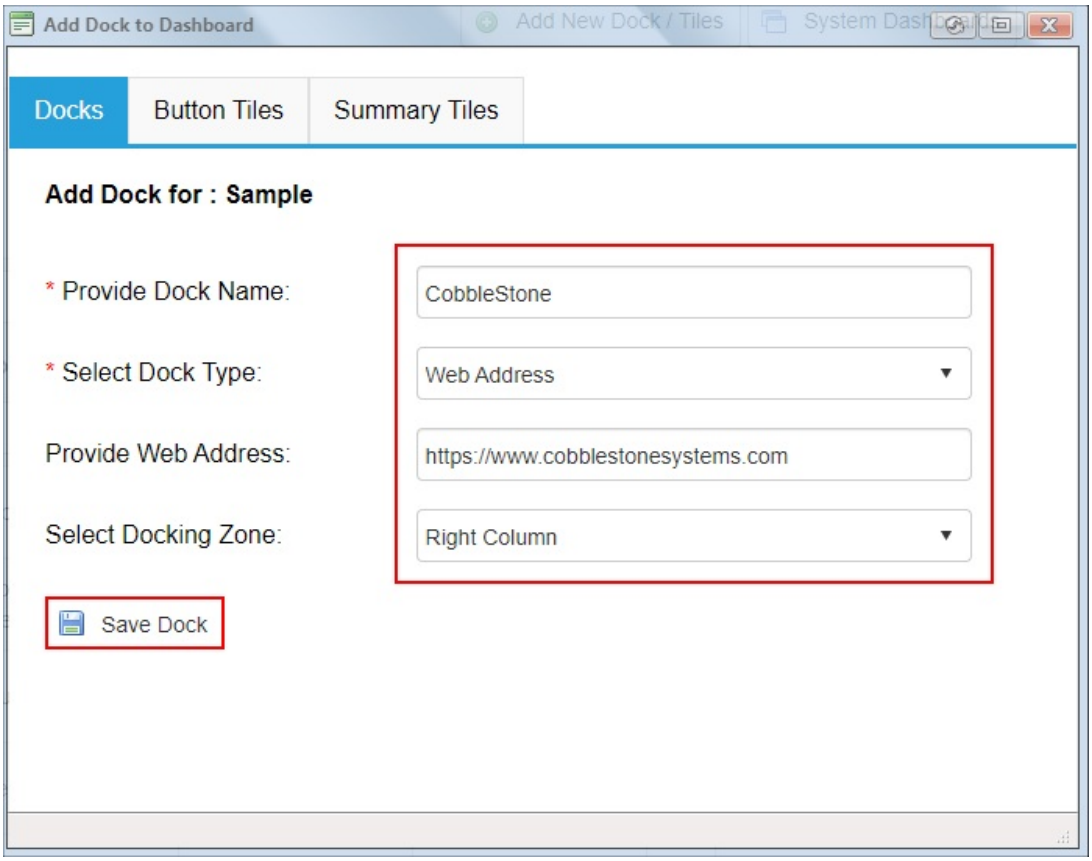
Note: that the Web Address must be full, including https://www.

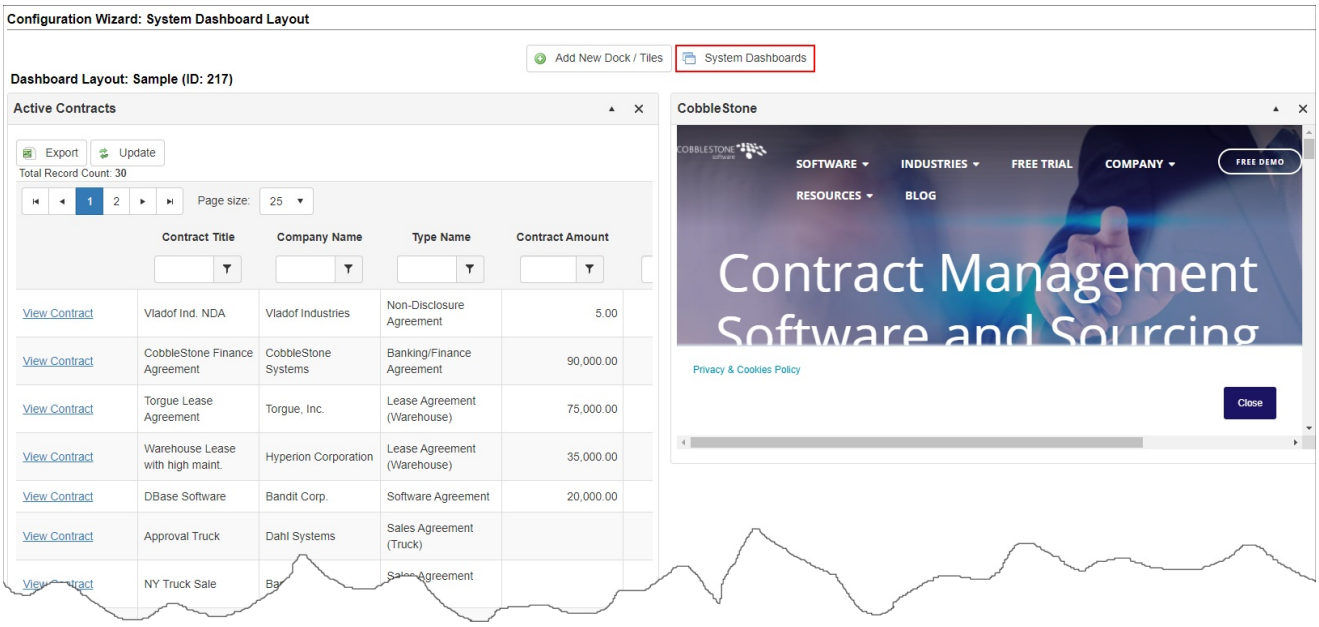
Also, not all Web Addresses are guaranteed to work, as it is dependent on the external website allowing itself to be placed in an **IFrame**.

In the example below, the **Ad-Hoc Report** was placed in the Left Column and the **Web Address** in the Right Column.



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STIMULSOFT GRAPHICAL DASHBOARDS

The Stimulsoft Dashboard presents a top-in-the-class kind of modern dashboard with graphical elements to provide valuable information to the user at a glance. This dashboard can be used to compare various fields, show summary of various fields, etc.

Using the Stimulsoft Dashboard is like using the Stimulsoft Report in CobbleStone.

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Note: Just like the Stimulsoft Reports, Dashboards generated with this tool will not enforce Application User Permissions without the appropriate filters defined within the Dashboard. Hence, only System Admins can create new Dashboards.

To Create a New Graphical/Stimulsoft Dashboard:

1. Click on Add New Dashboard.

2. Choose Graphical Dashboard.

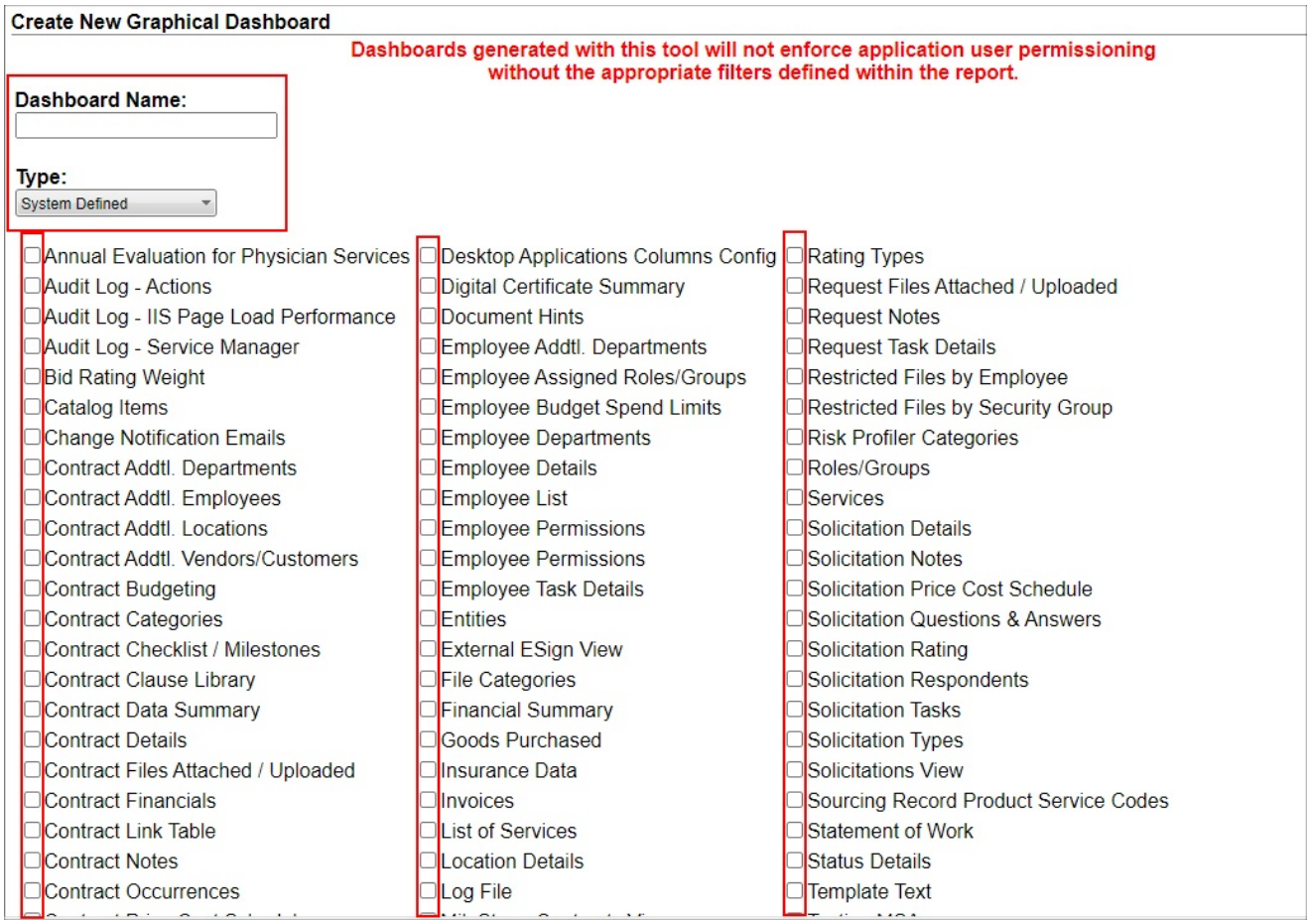
3. Enter/ select the following

A. Enter a name for the dashboard

B. Select the data source type, system defined or ad-hoc report

C. choose the various sections from which the data is to be collected for the Dashboard

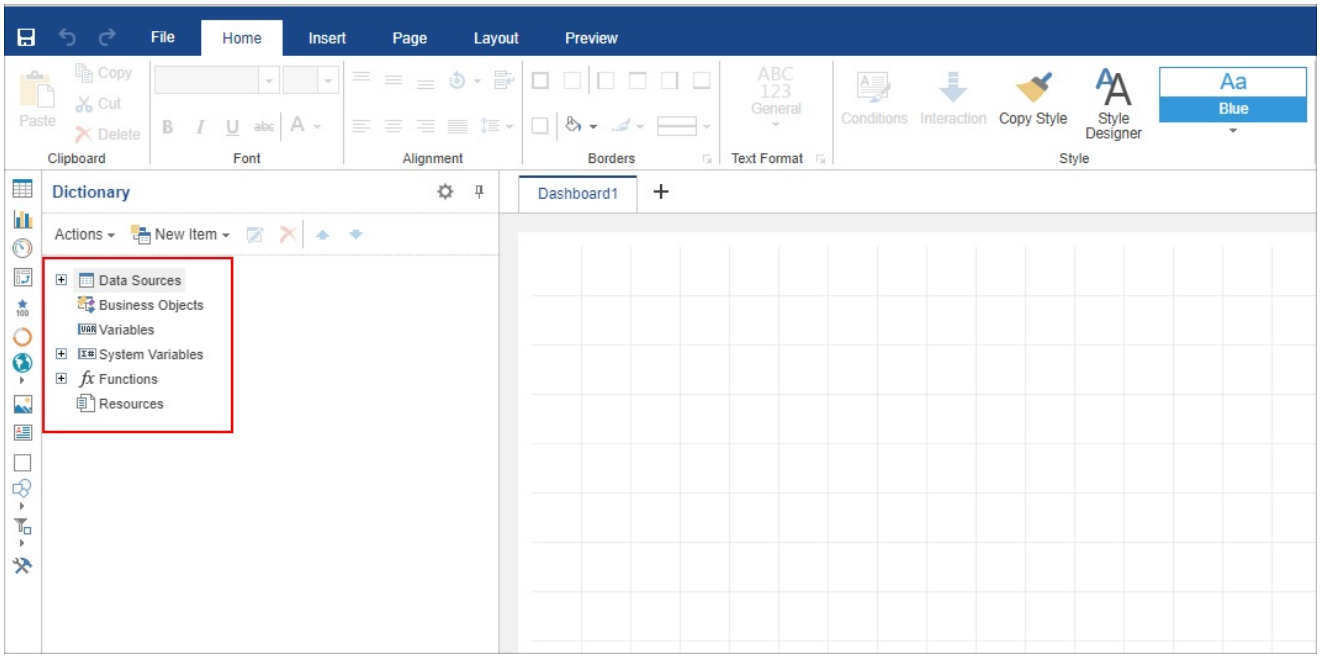
D. Enter a description for the Dashboard.



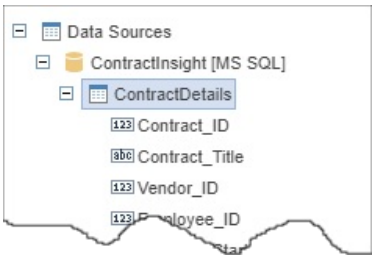
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4. Click **Create Dashboard**.

5. The **Dashboard Designer** page displays. Focus your attention to the left side.

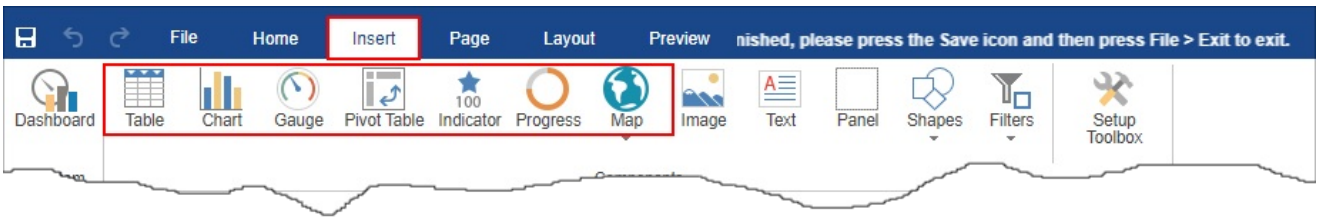


6. Expand the Data Sources to reveal all your fields.



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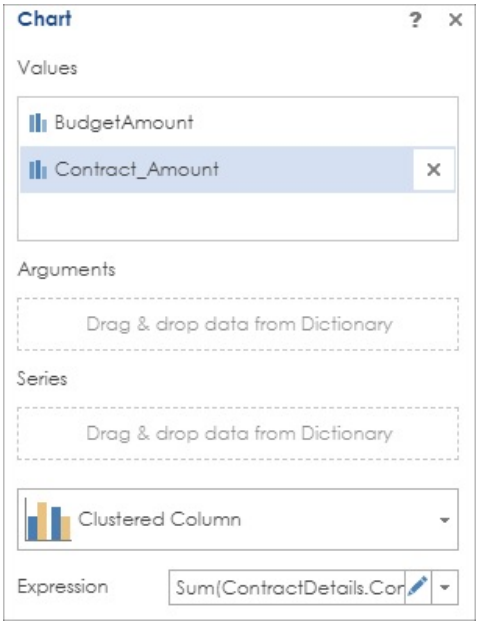
7.Go to the Insert tab and click the type of Graphical chart you need.



8. Once you click on one of the elements, go to the Design board and click where you want the graph to appear. The chart should appear where you clicked with a Drag & Drop data from dictionary box with it.



9. Drag fields from the left side menu **Data Sources** to the box for **Value**, **Arguments**, and **Series**.



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10. Enter a custom expression by clicking the **Edit icon** on the Expression field (the last field in the box). The area expands for the entry of a custom expression.



11. Click **Close** in the expression box. If desired, resize the Graphical Element in the Designer view.

12. Repeat steps 7 to 11 for other needed graphical elements.

13. Once finished with the design, press the **Save icon** and then press **File** > **Exit** to exit the Stimulsoft Dashboard Designer.



14. The next screen will show the various details about the dashboard. At this screen, assign the newly created dashboard to the users (including the creator of the dashboard). This is because the dashboard won't take user permissions into consideration.

15. You have created a Graphical Dashboard!

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CONFIGURATION of Graphic Dashboards

Admins may choose to Disable / Enable this feature in their system. To do so, go to :

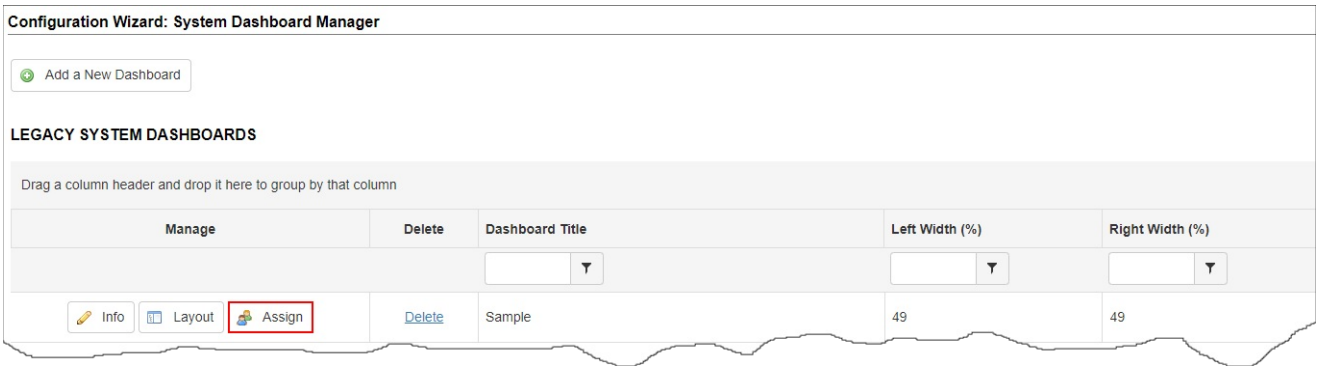
1. Navigate to **Manage Setup** > **Application Configuration** > **Config Settings**

2. In the **Configuration Group** drop-down box, select General System.

3. The Setting **Graphical Dashboard** is available to enable or disable Graphical Dashboards for users.

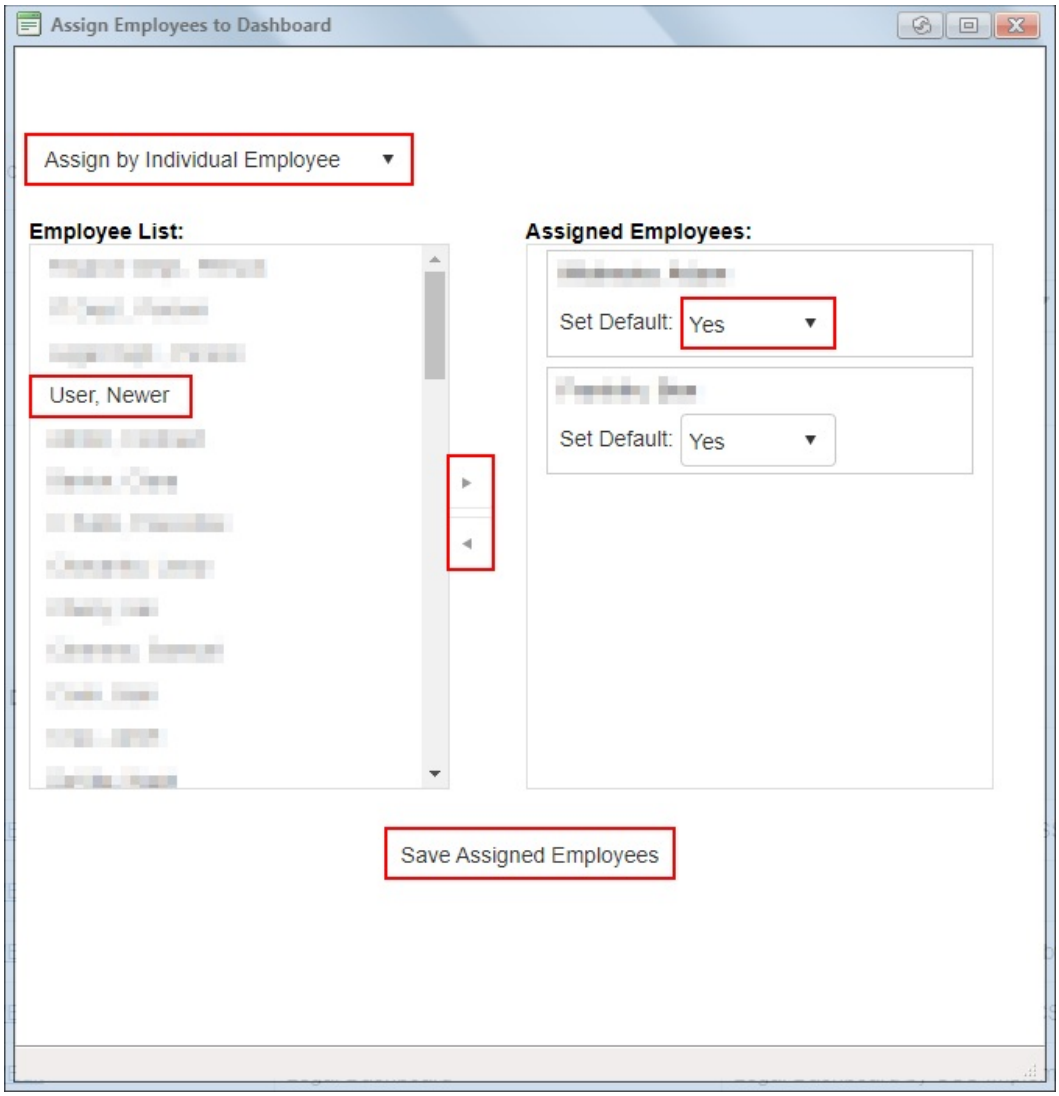
Assigning a Dashboard to Users

Click **System Dashboards** to go back to the list, then click **Assign** to assign the dashboard to users, user groups, and/or security groups.



Using the pop-up window, move **Employees, Employee Groups, and/or Security Groups** from the left to the right, assigning them to the **System Dashboard**. Select the assignment type from the pick-list at the top of the window. Select the individuals or group, and click the right-facing arrow. Once assigned, they will be able to access the **System Dashboard** via their **Dashboards**. Note the added **Default Dash** functionality that appears once assigned; if set to **Yes**, the System Dashboard will always be the first thing the User sees upon login; they will not be able to change that unless they are also a System Admin. Click **Save Assigned Employees** to finish System Dashboard configuration.

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For more information, please see the manual attached to this wiki article.

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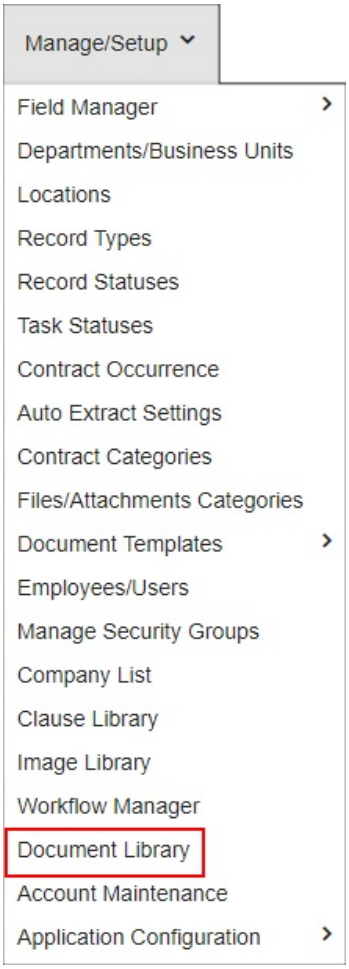
Document Library

Document Library

AppConfig: Document Library

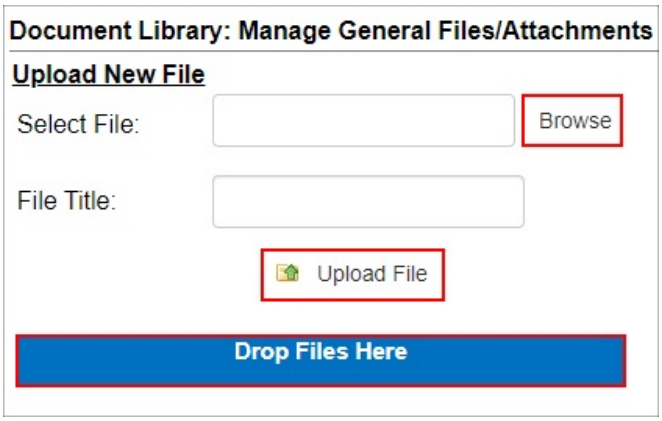
The **Document Library** allows you store Documents in Contract Insight without them being attached to any particular record. Every Users of your Contract Insight system will have access to the Document Library, but only a System Admin can manage the files, including adding/deleting and versioning. There is also added benefit to the Document Library if you use the **Vendor/Client Gateway** Add-On Module, as you can optionally make files available on the Gateway. Files will default to being purely **Internal**, but can be adjusted later to be made available on the Gateway.

To access the **Document Library**, navigate to **Manage/Setup** > **Document Library**.

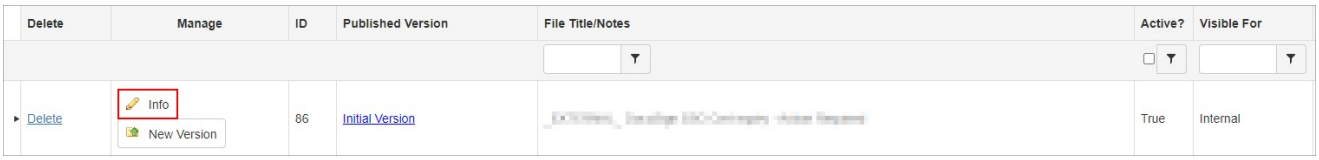


Click **Browse** to locate and select the file to add. Optionally, apply a custom **File Title**. Click **Upload File**.

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The file is added to the Document Library, with indication that it is the **Initial Version**, is **Active**, and is only visible **Internally** (this being only relevant if the organization has the **Vendor/Client Gateway**). Click **Info** to make adjustments.



Title / Notes: Adjust the display name of the file here.

Collaboration Type: This is only pertinent if the organization has the Vendor/Client Gateway.

- **Internal:** File can only be viewed internally on your Core System
- **Gateway:** File can also be viewed by Vendor/Client Users authenticated into your Gateway System
- **Public:** File can also be viewed by anyone who reaches your Gateway; they do not need to log in to access the file

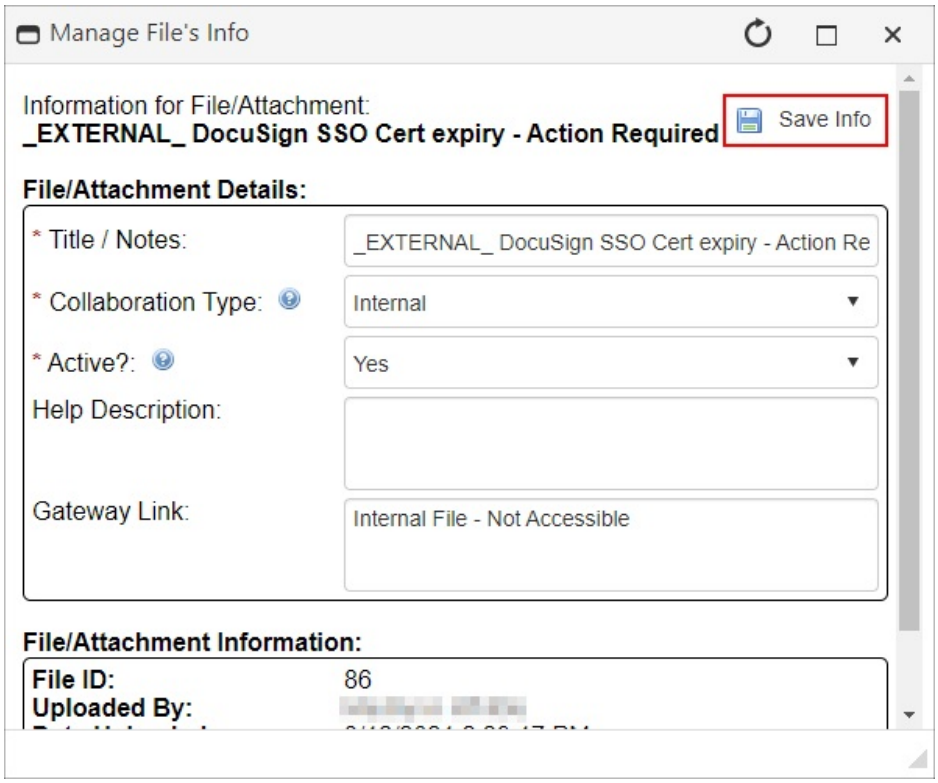
Active: Determines whether or not the file appears at all.

Help Description: Populates the Description field.

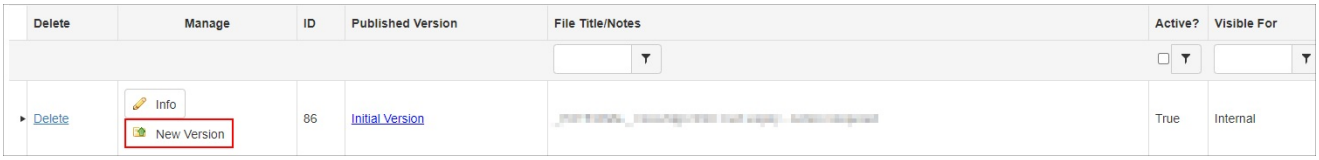
Gateway Link: Populates automatically in accordance to the Collaboration Type setting.

Click **Save Info** to save any changes made.

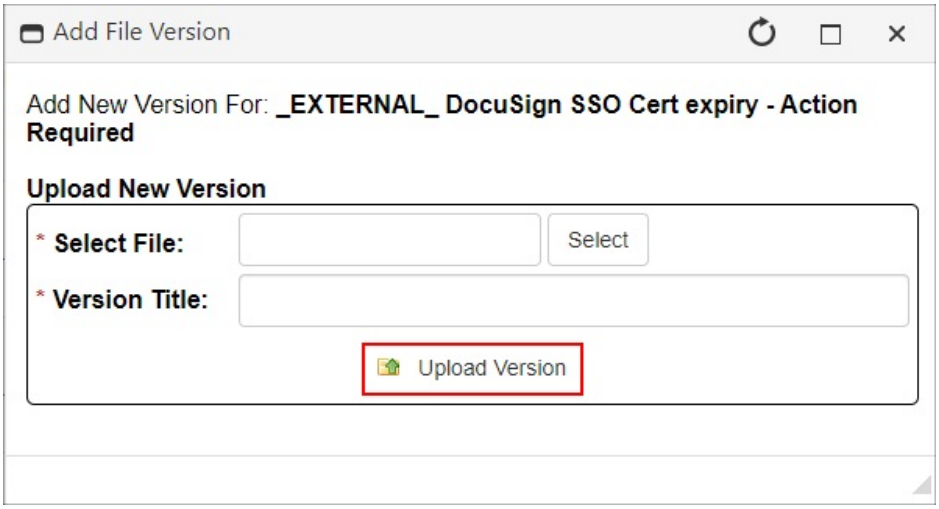
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Click **New Version** to publish a new version of the file in the Document Library.

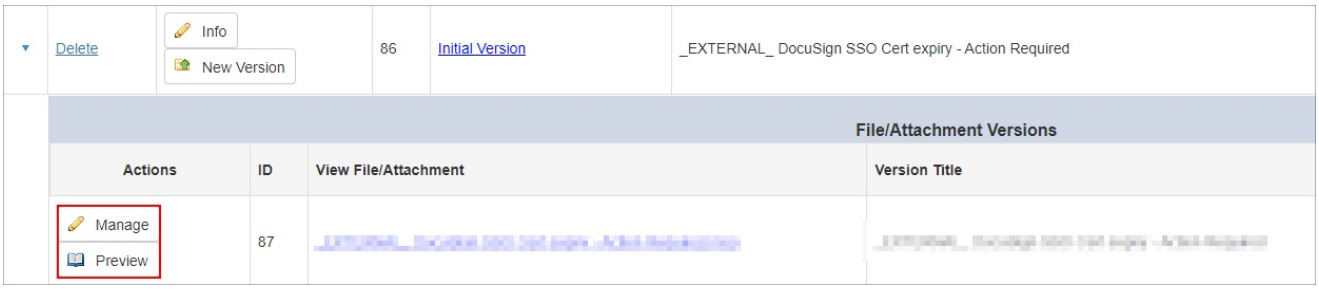


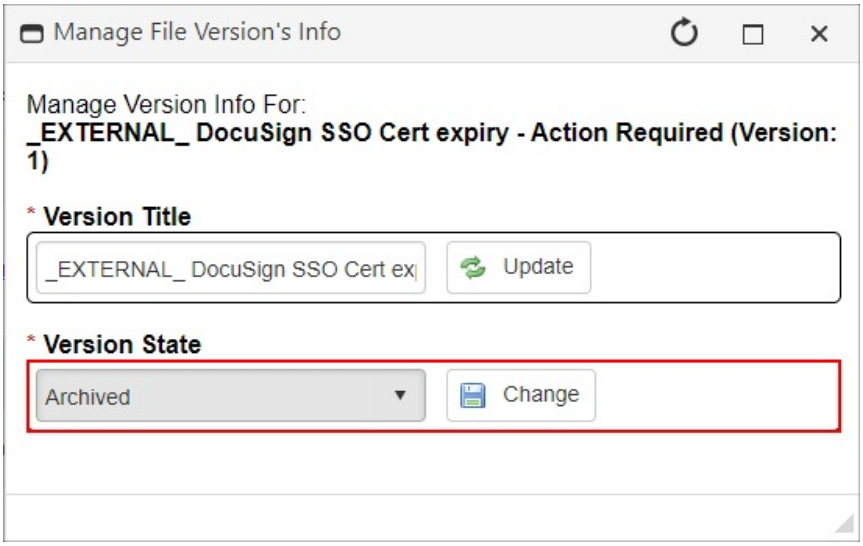
Browse for the New Version and title it appropriately. Click **Upload Version**.



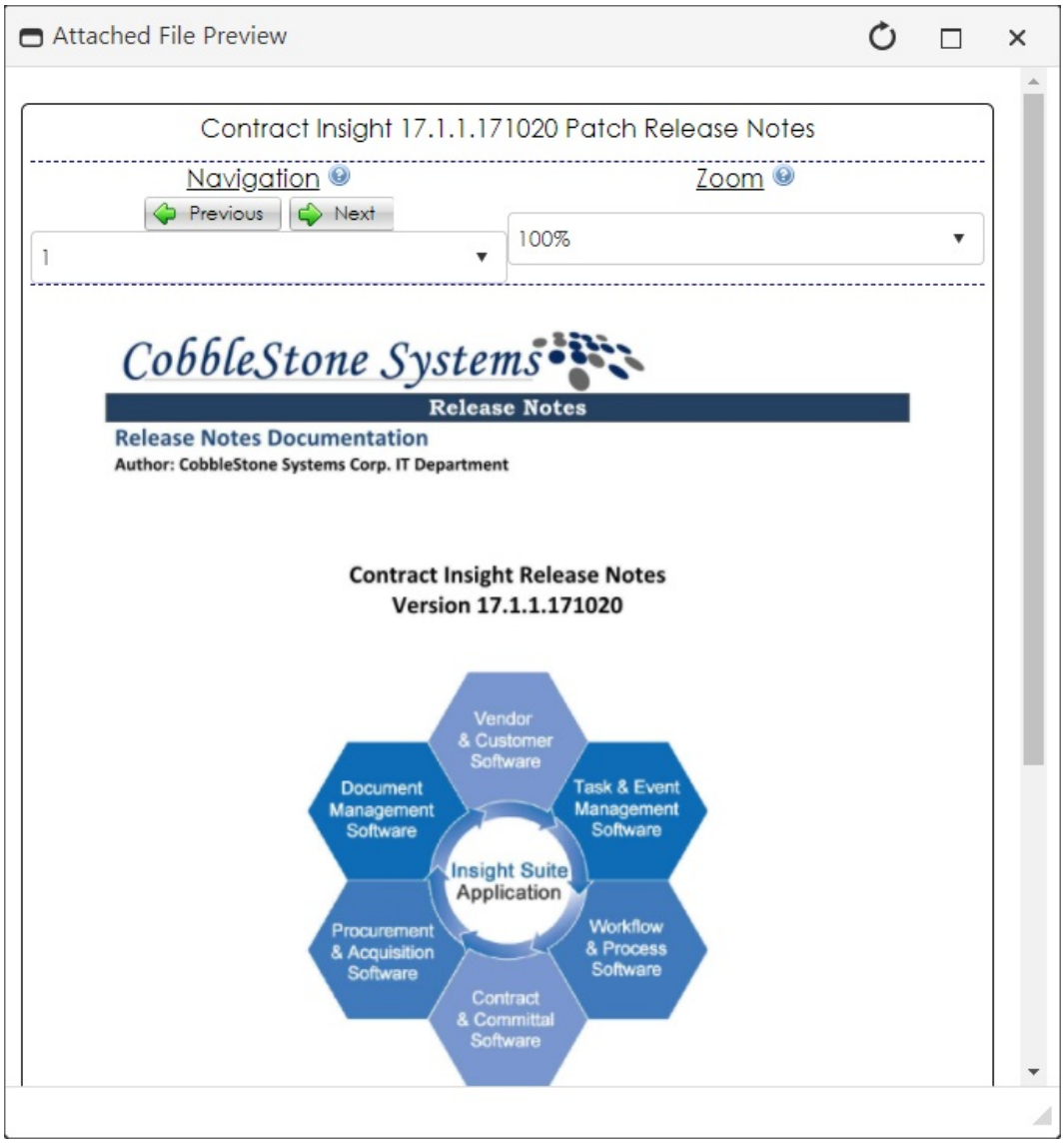
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The caret to the left of the file can be used to manage versions. Click **Manage** for a version to configure its **Title** and whether it is Archived or Published. Click **Preview** to Preview the file within the system.





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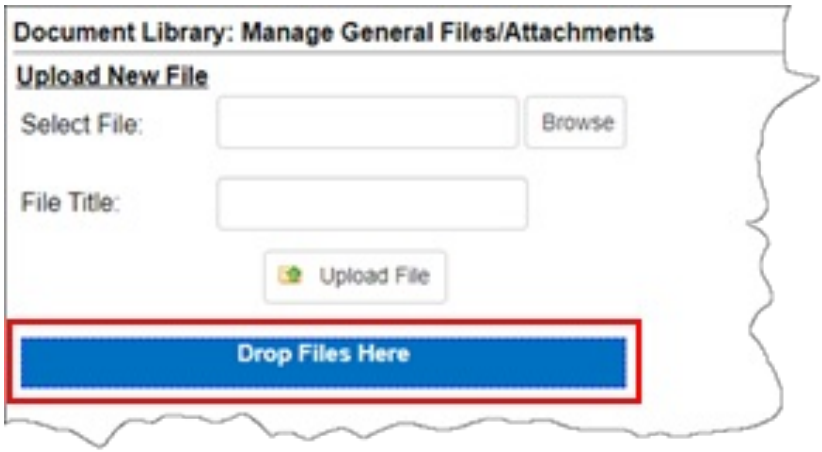
Doc Library Drag and Drop

As with everything Cobblestone offers, convenience is a huge priority. If a user has documents ready to go, Cobblestone's **Doc Library Drag and Drop** maximizes convenience for users as this cuts out many in-between steps while searching for important documents, especially if they have already been added once before into the system

Note: any folder structure in the document library can be built, but it will not carry forward from your operating system

1. To drag and drop a file to the document library, first click the **Manage/Setup** dropdown.
2. Click **Document Library**
3. From this screen, drag and drop the necessary files onto the blue **Drop Files Here** area.

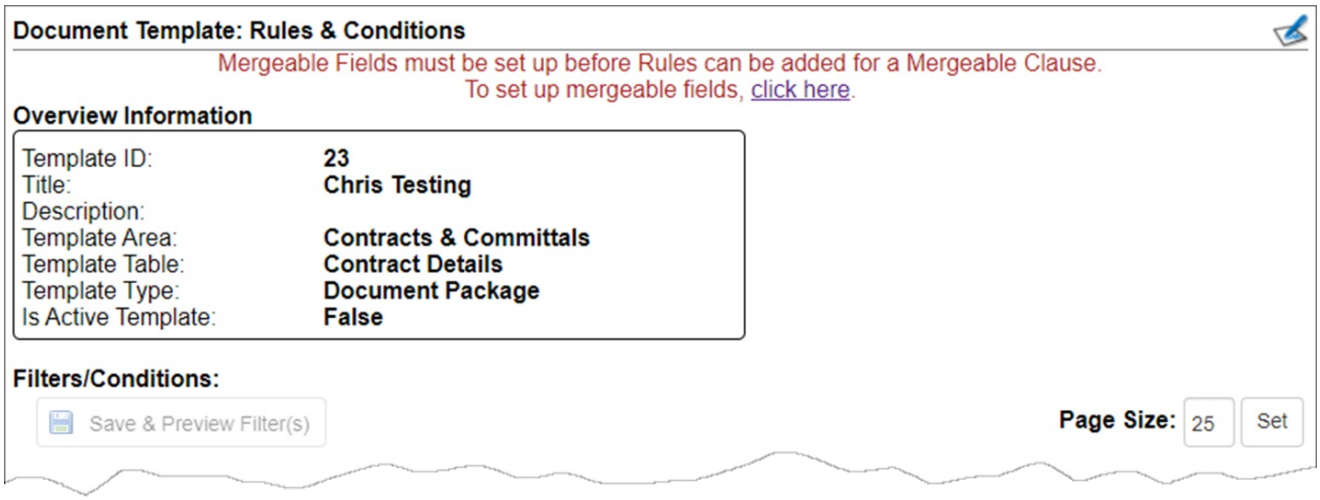
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When a file has been successfully added to the document library via Drag and Drop, the following message displays.



Note: If no fields are selected in Mergeable Fields, the following error message appears.



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Multi-Factor Authentication

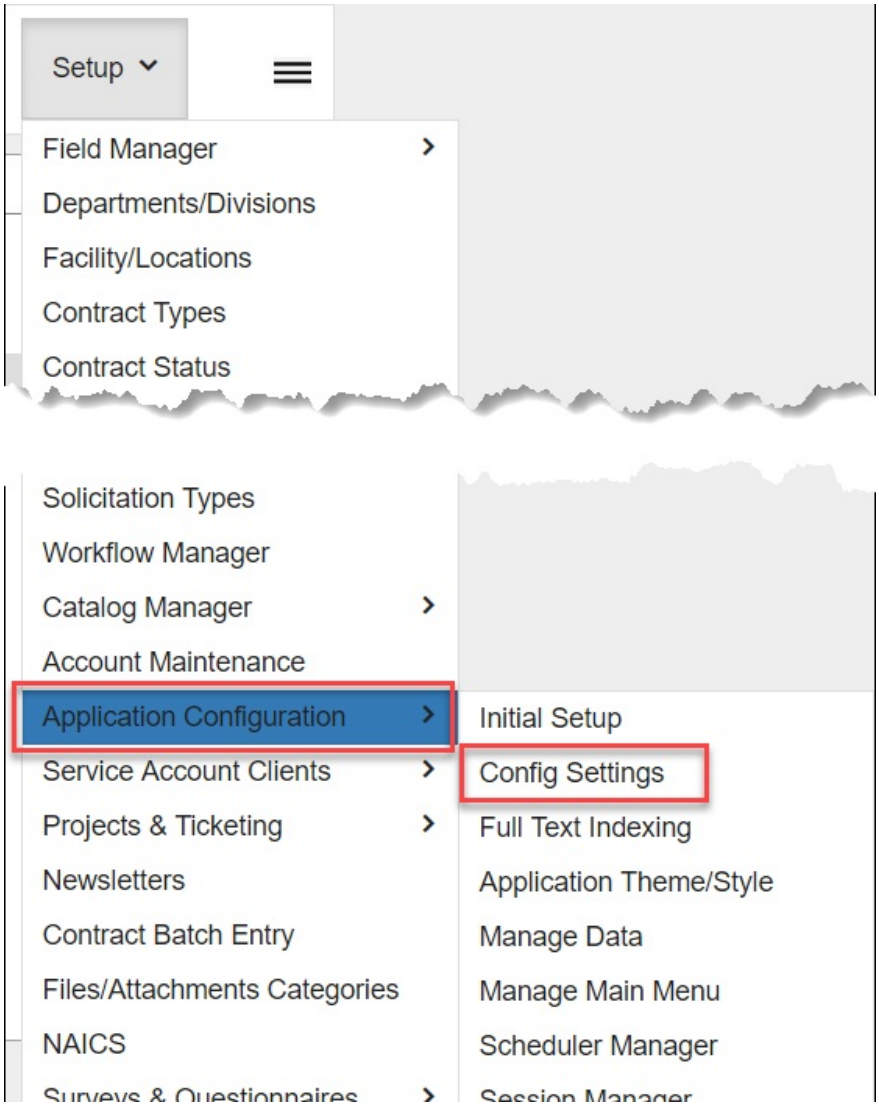
Multi-Factor Authentication (MFA)

Multi-Factor Authentication (MFA)

The MFA Settings and MFA Questions pages allow for the configuration of Multi-Factor Authentication. MFA requires a user to provide additional authentication information, such as a code sent to their email and/or verification questions, to validate their login.

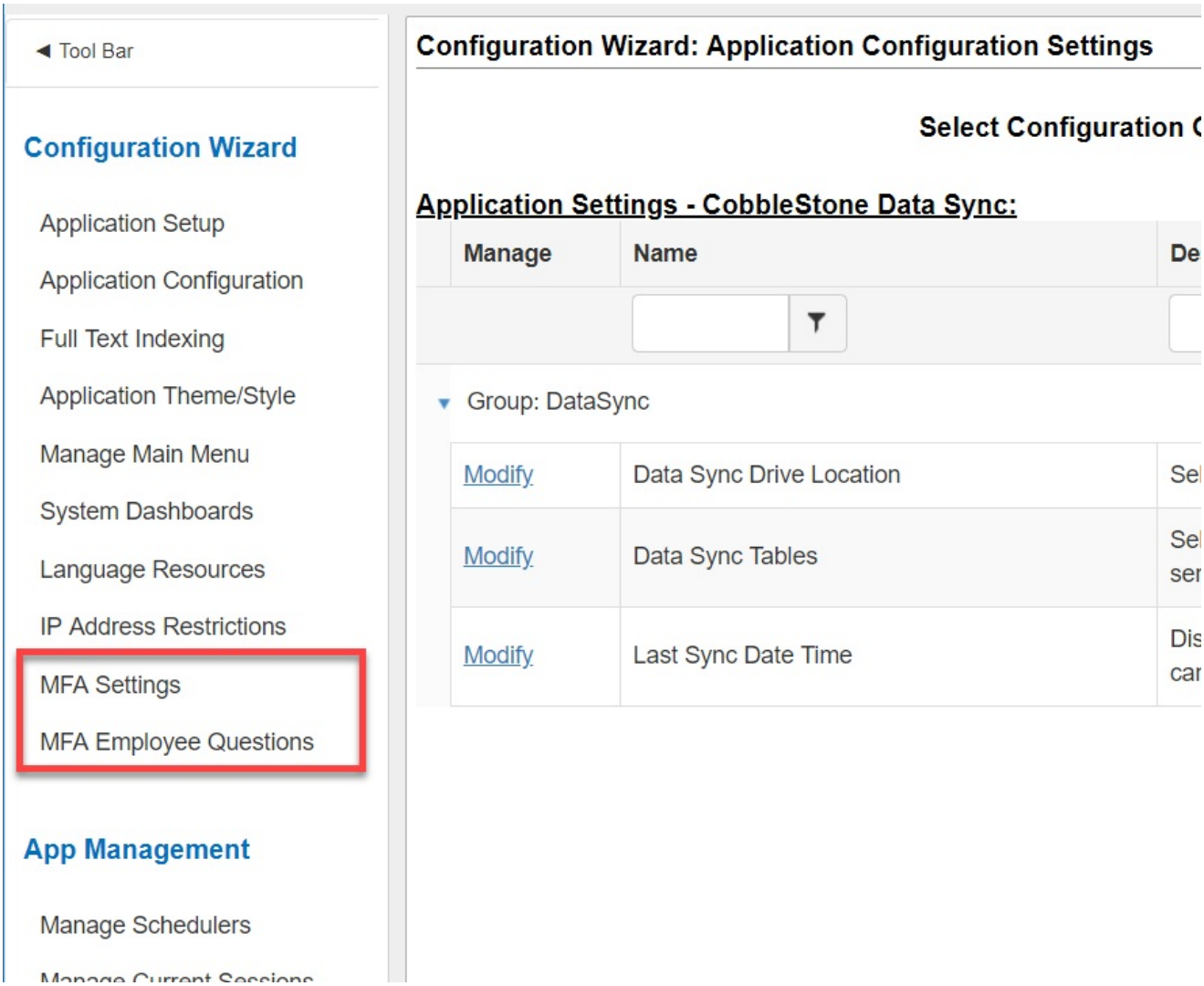
Note: Multi-Factor Authentication within Contract Insight is only implemented for those using the standard login method. Users with SSO login would need to contact their authentication service for MFA.

1. Multi-Factor Authentication can be found under the **Config Settings**.



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2. Once on the **Config Settings** page, MFA can be found in the menu on the left side of the page.



Multifactor Authentication: Settings

Multifactor Authentication Enabled - This sets whether Multifactor Authentication is enabled (True) or disabled (False)

Multifactor Authentication Style - This setting determines how Multifactor Authentication validates the initial login. The options are: Email Code, SMS Code, SMS or Email, Email or SMS, Challenge Question.

Note: Sending a code via SMS requires SMS Messaging to be set up. See the SMS Messaging wiki page for information.

Multifactor Code Style - Defines what type of characters to use when creating the challenge code. The options are: Caps Only, Alpha Only, Numeric Only, Unambiguous.

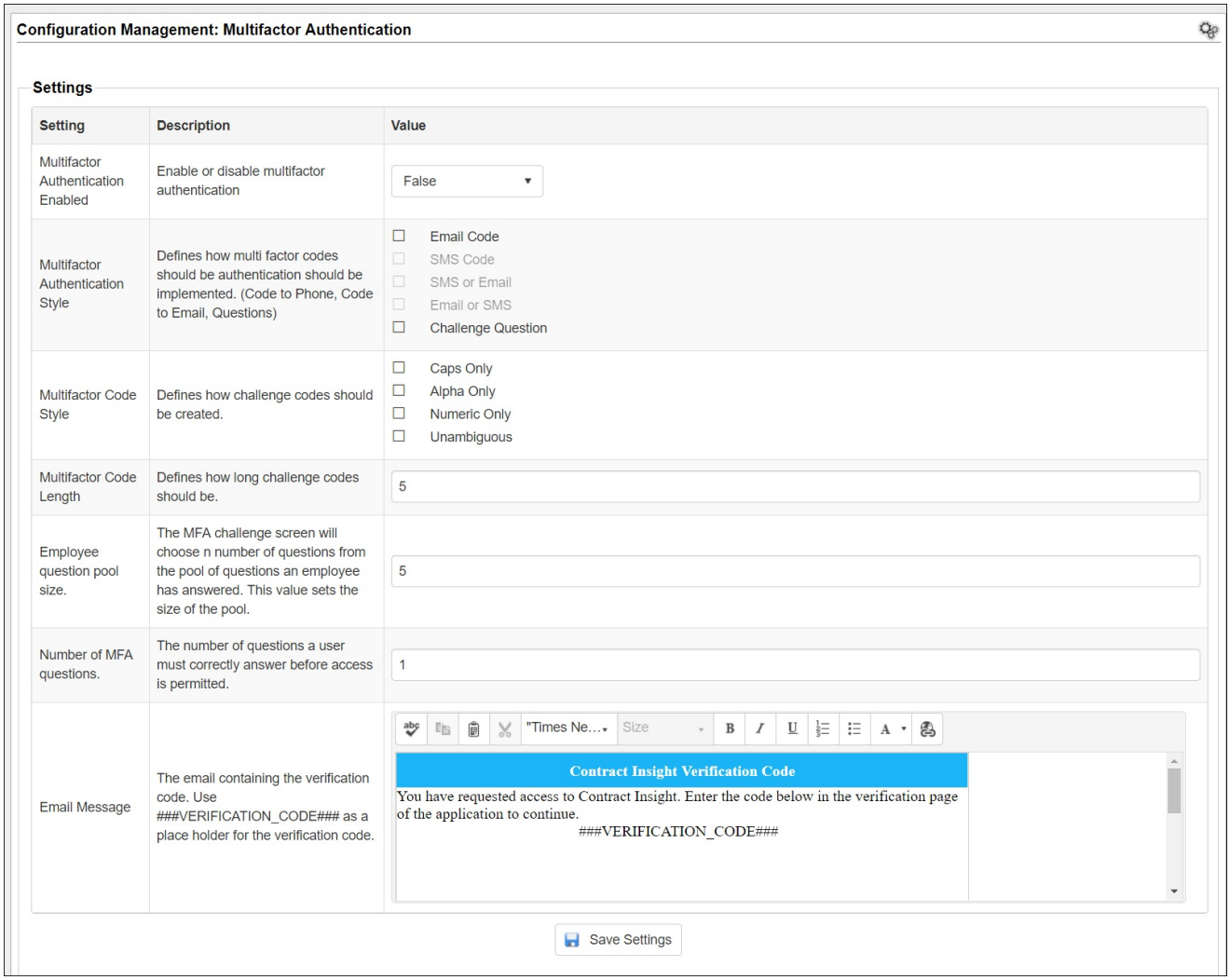
Multifactor Code Length - This setting is for how long challenge codes should be. The default is 5 characters.

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Employee question pool size - This is the pool of questions the system chooses from for authorization.

Number of MFA questions - The number of questions a user must correctly answer before access is permitted.

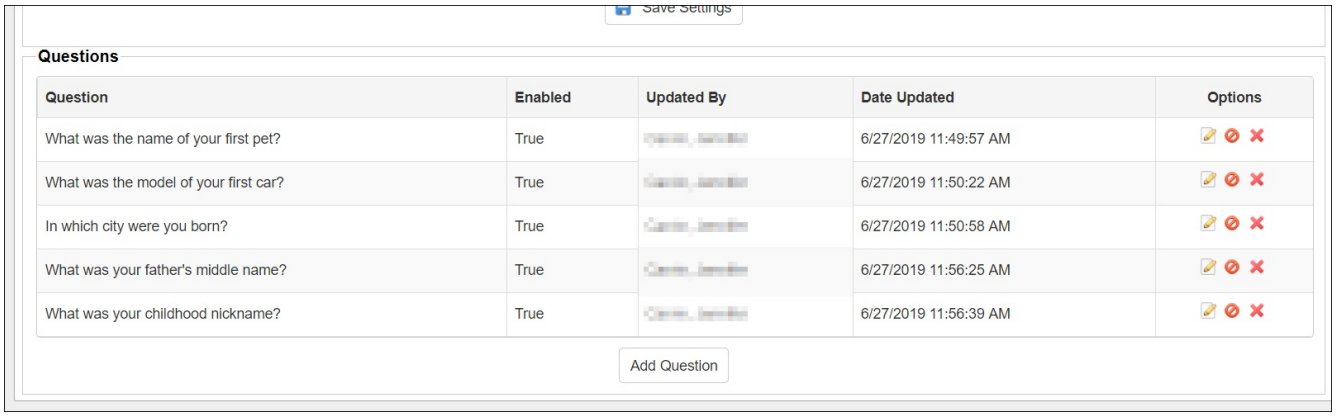
Email Message - The email that is sent out containing the verification code. Use ###VERIFICATION_CODE### as a place holder for the verification code.



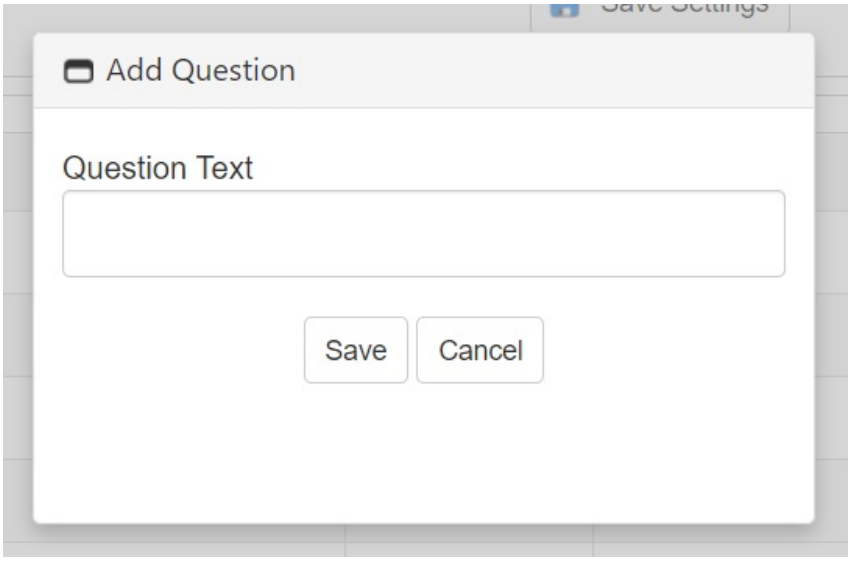
Multifactor Authentication: Questions

The list of available challenge questions set up by the System Admin are found at the bottom of the **MFA Settings** page. Existing questions can be managed using the icons in the **Options** column. From left to right they are: Edit, Enable/Disable, and Delete.

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To add a new question, click **Add Question** at the bottom of the questions list. Type your question into the pop-up **Add Question** screen and click **Save** to add the new question to the list.

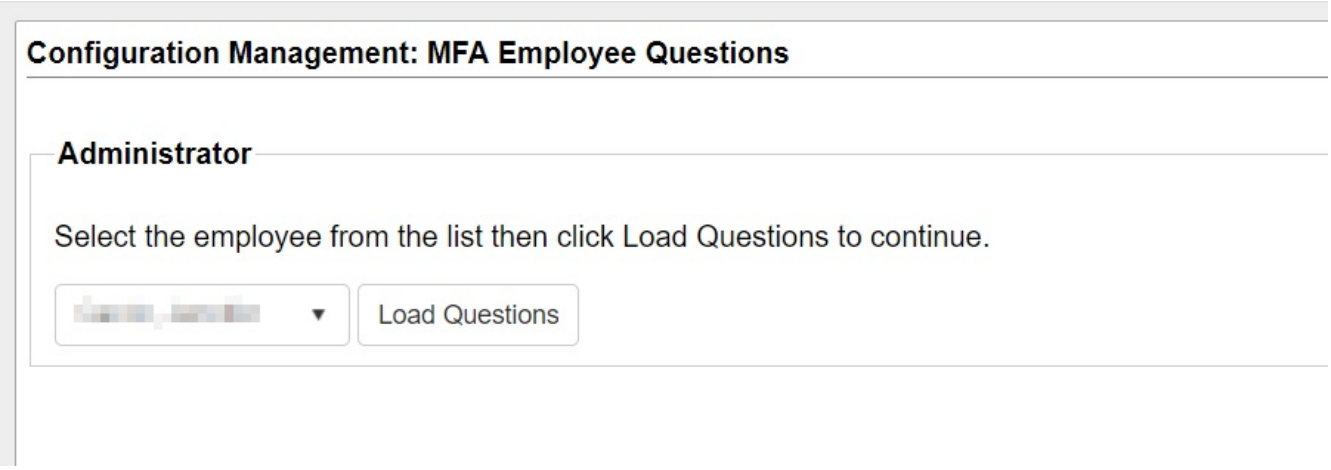


Set MFA Employee Questions

1. Click the **MFA Employee Questions** link in the side menu.

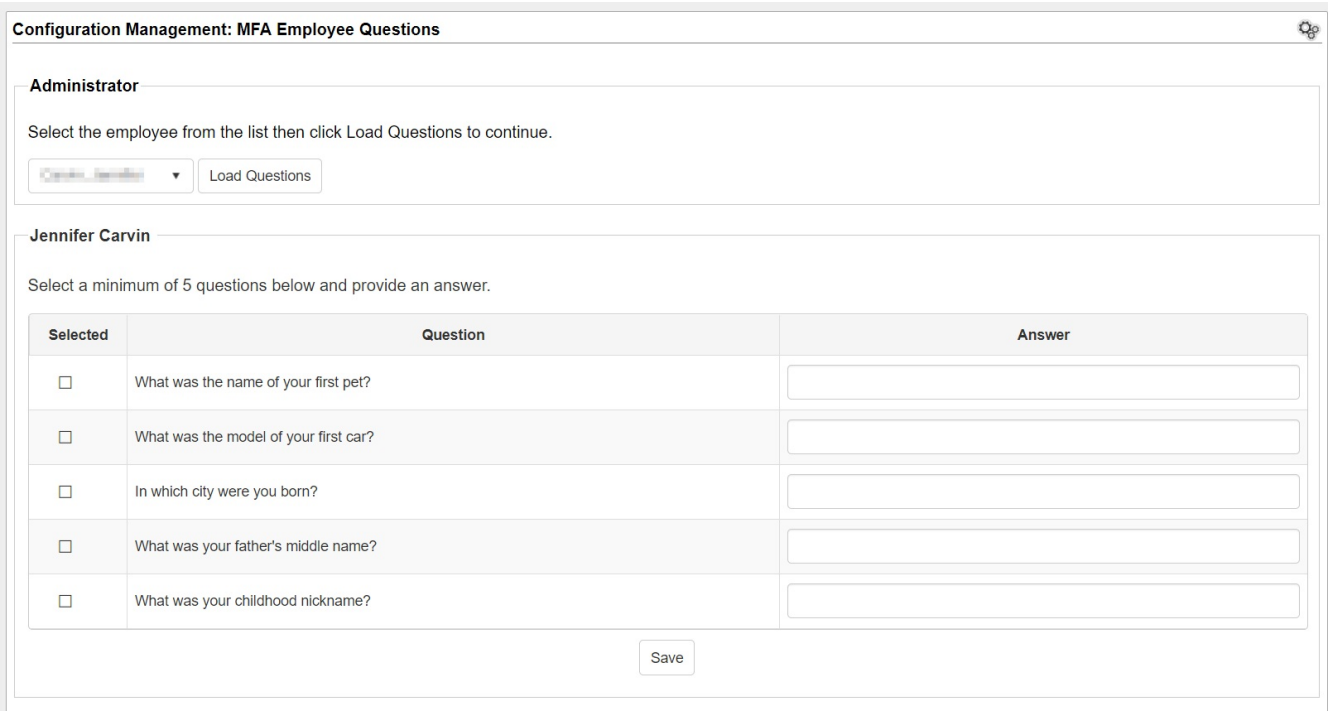
2. In the next window, **select the user** from the drop down list and click **Load Questions**.

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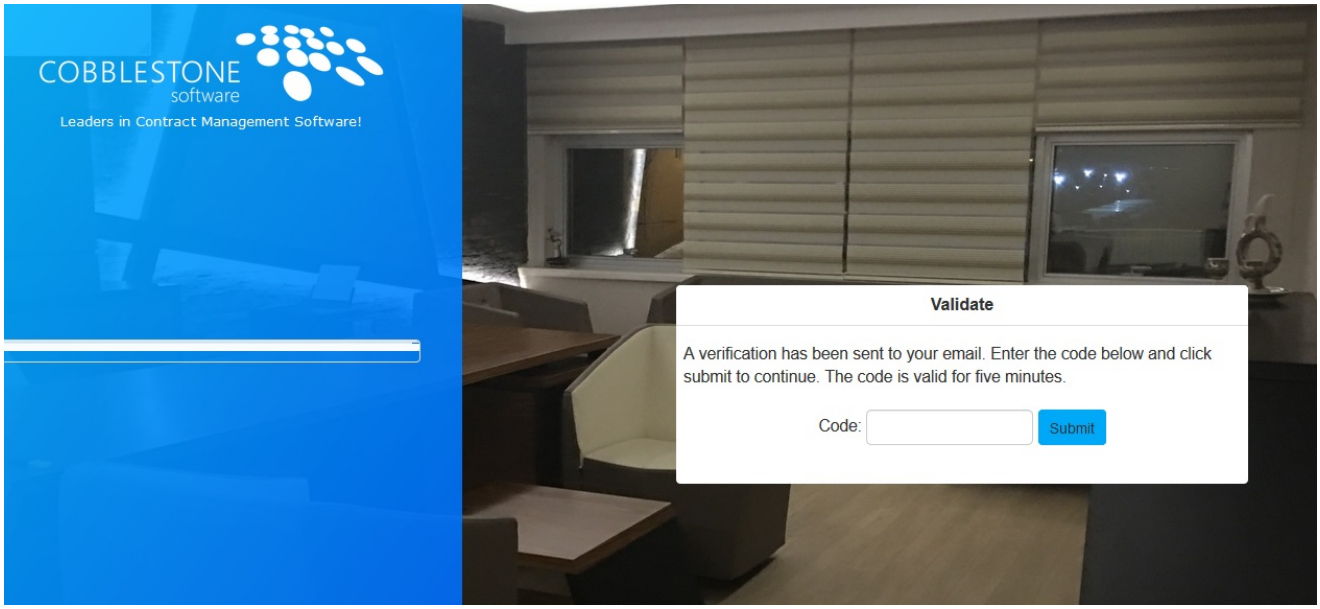
3. The list of available questions will populate. Check the box in the **Selected** column to choose the questions for the employee, then enter their answers and click the **Save** button.

Note that the minimum number of questions needed is the number in the **Employee question pool size** setting on the **MFA Settings** page.

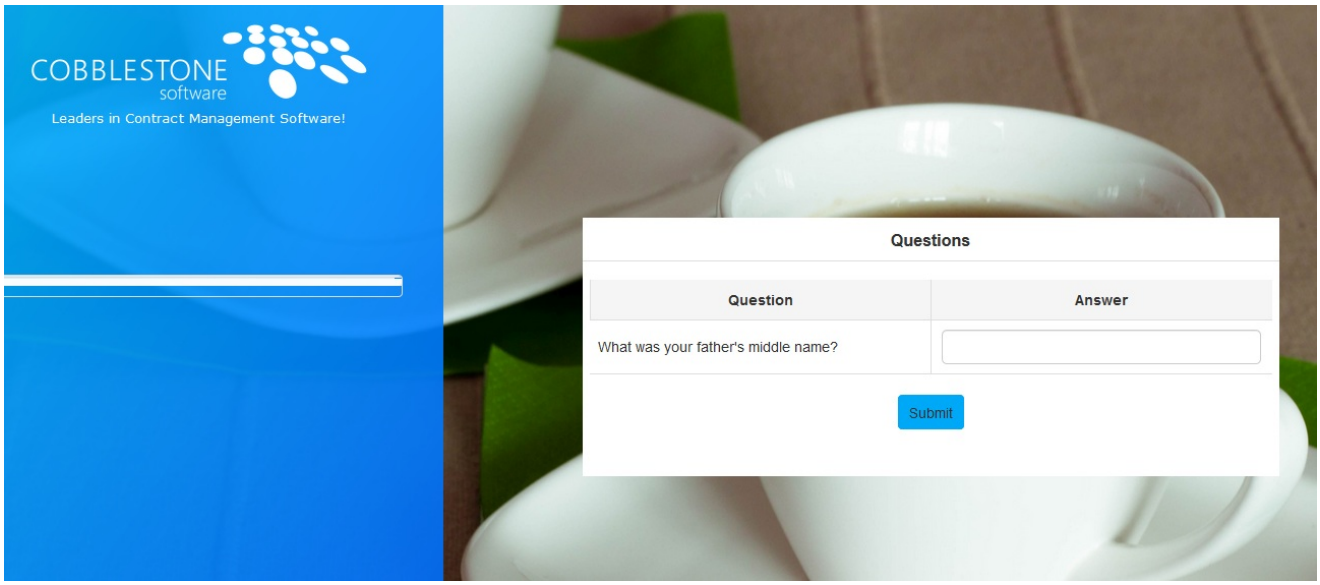


4. The next time the user logs in to Contract Insight they will be prompted to validate their login.

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5. Once validated, and if they are set up, the user will be presented with any question(s) needed to authenticate their login.



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Search Engine Configuration

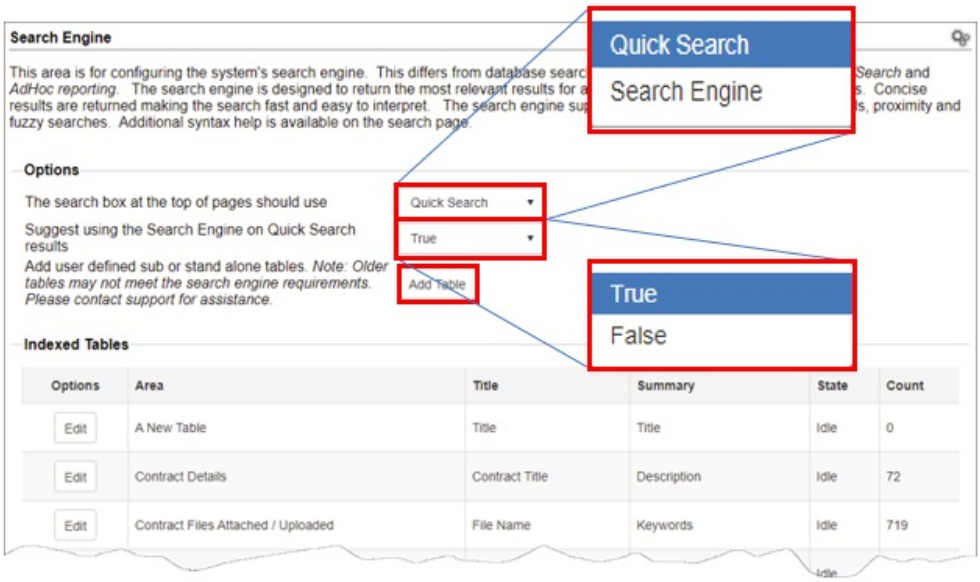
Search Engine Configuration

Search Engine Configuration

In addition to the standard **Quick Search** option, CobbleStone offers Search Engine functionality, returning results based on relevancy instead of area.

To configure the Quick Search functionalities, click **Manage/Setup**, **Application Configuration**, and **Quick Search Configuration**. Under the **Search** option on the side menu, click **Search Engine**.

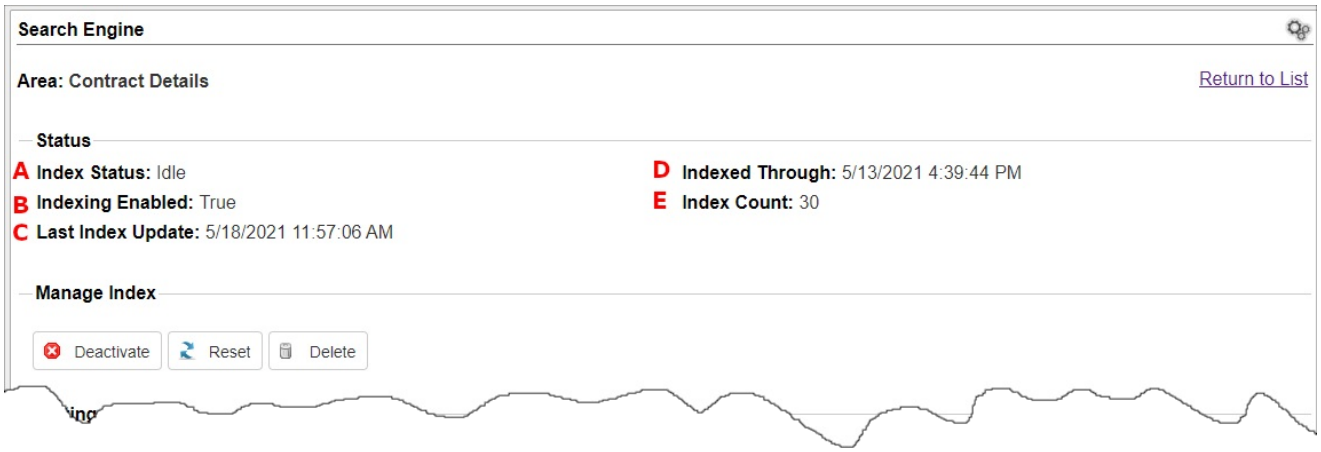




From here, users have the option to utilize either the Quick Search option, or the Search Engine option. As well, System Admins have the option of suggesting the **Search Engine** on **Quick Search** results.

When **Edit** is clicked, the following screen appears:

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A: This is the status for the index, which is Idle in this case.

B: This asks, is indexing enabled? If yes, the answer is set to True. If no, the answer may be set to False.

C: This gives us the last index update. Specifically, this is the date and time the indexer last checked for updates.

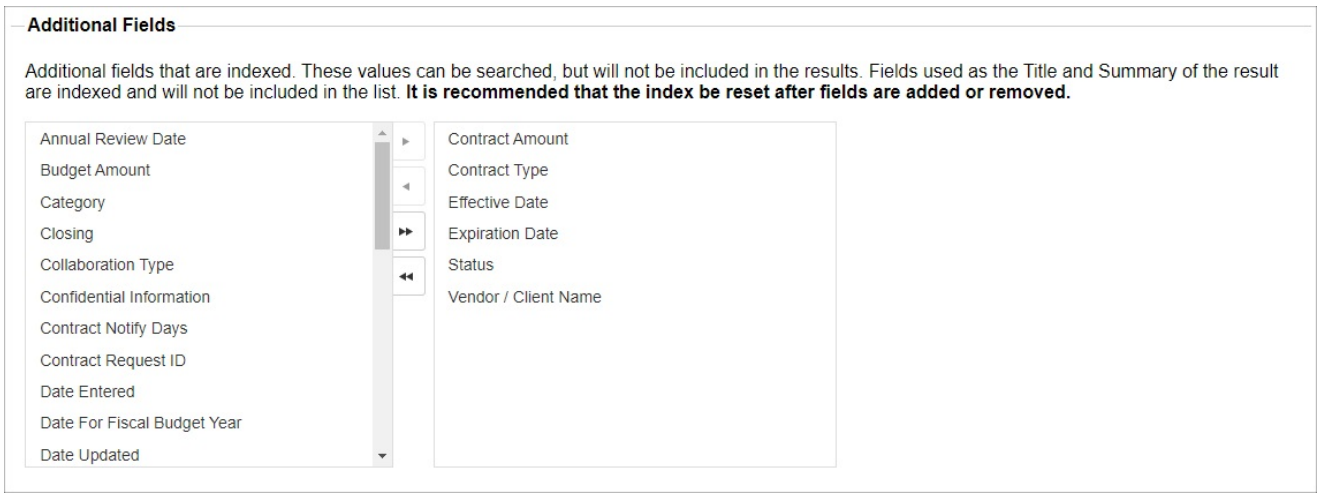
D: This gives us the Date Updated of the last record added to the index for this area. Records that have been added prior to this date are are included in the index. Records with a later date updated (in this case, later than May 13, 2021 at 4:39PM) will be indexed in the future.

E: This is the number of records from this specific area in the index.

NOTE: Indexing is done in batches and the Index Count may not coincide with the number of records in CobbleStone.

Additional Fields to the Search Engine

Additional fields to the search engine may be added. These are additional fields that are indexed, which values can be searched but not included in the results. Fields used as the Title and Summary of the result are indexed but not included in the list.



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As bolded above, it is recommended that the index be reset after fields are added or removed.

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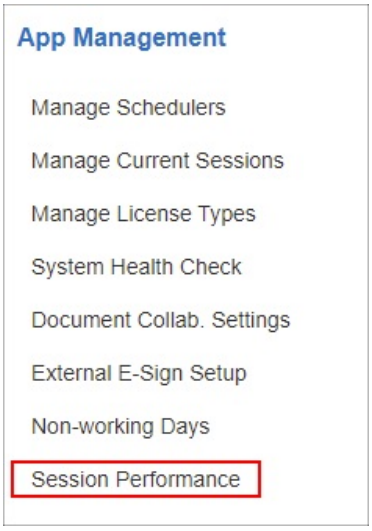
Session Performance

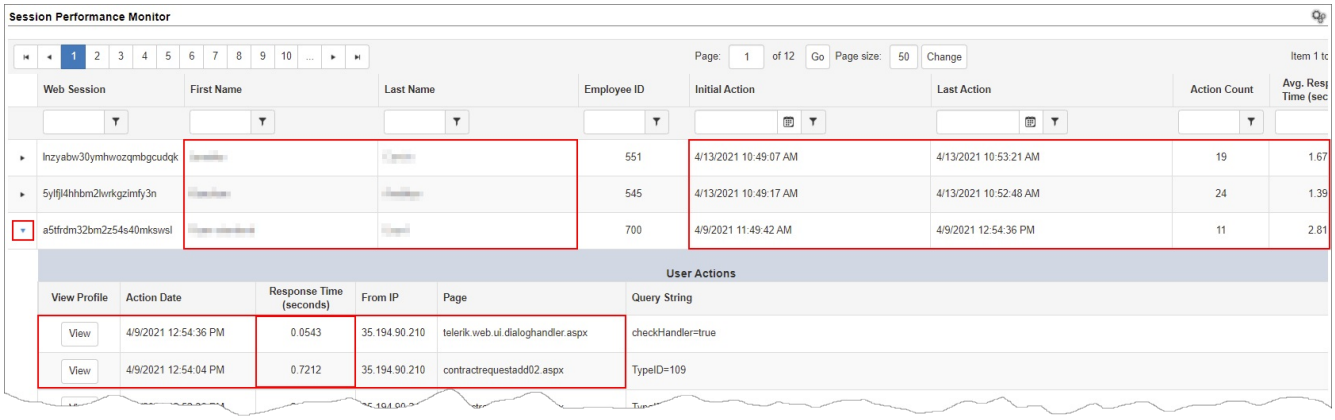
Session Performance

Session Performance, Reporting, & Profiling

When evaluating performance, it is important for System Administrators to have the ability to see exactly how many actions are being taken by an employee over a certain period. It is also vital to see how quickly and efficiently the CobbleStone system is running. With **Session Performance, Reporting and Profiling**, this allows for transparency in these areas, as well as troubleshooting capabilities.

To access Session Performance, click **Manage/Setup**, **Application Configuration**, and **Initial Setup**. Under the App Management side menu, click **Session Performance**.

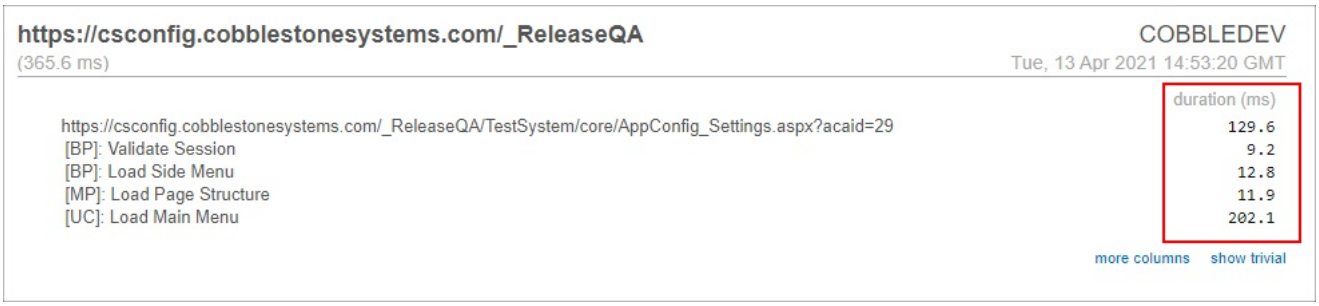




The first names, last names, initial action, last action, action count, and more are all listed here. This allows System Administrators to view who exactly is acting, when they are acting, and how many actions they are taking.

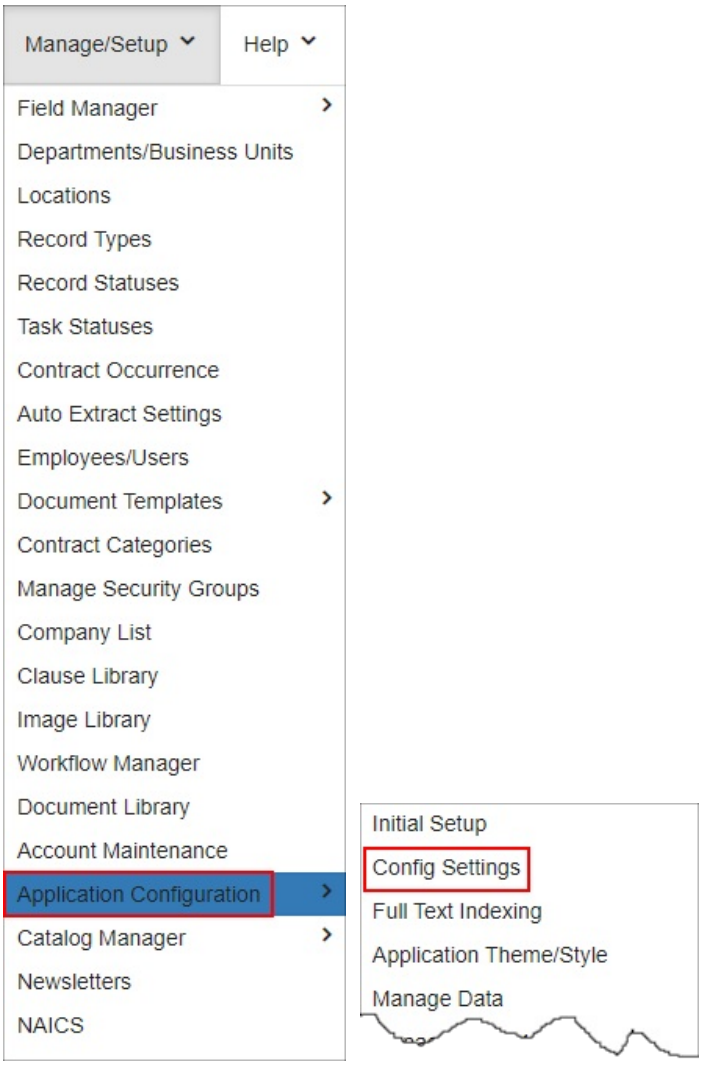
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In the **Session Performance** Monitor, we have some very valuable tools available. For one, we can click the **carrot** to see system response times in seconds. When **View** is clicked, this gives us a breakdown of the time (in milliseconds) the page took to open, consisting of items like validate session time, load main menu time, and more.



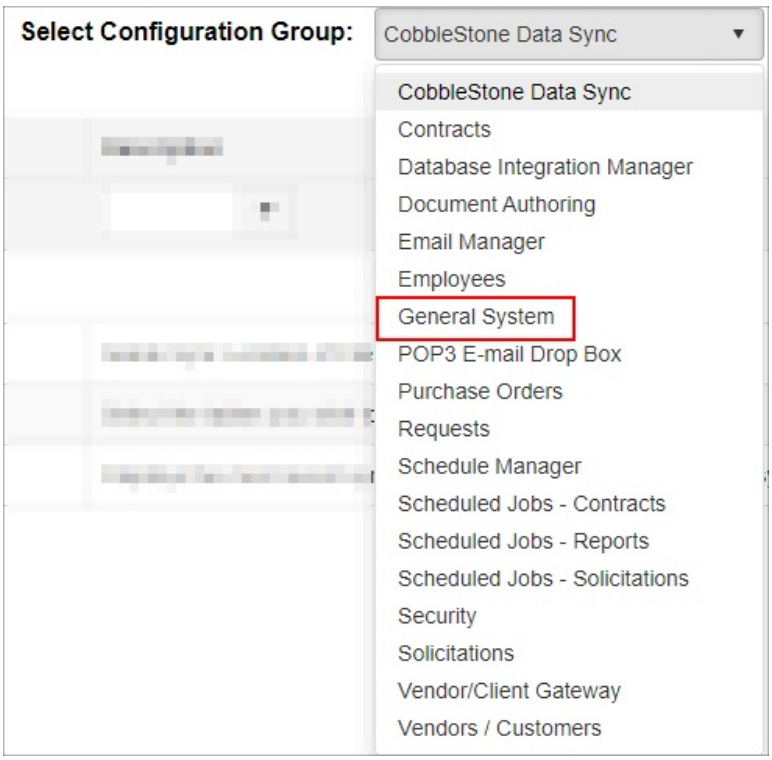
Configuring the Session Performance Manager

Out of the box, the Session Performance manager is defaulted to Active=False. In order to configure this to Active=True, click **Manage/Setup**, **Application Configuration**, and **Config Settings**.

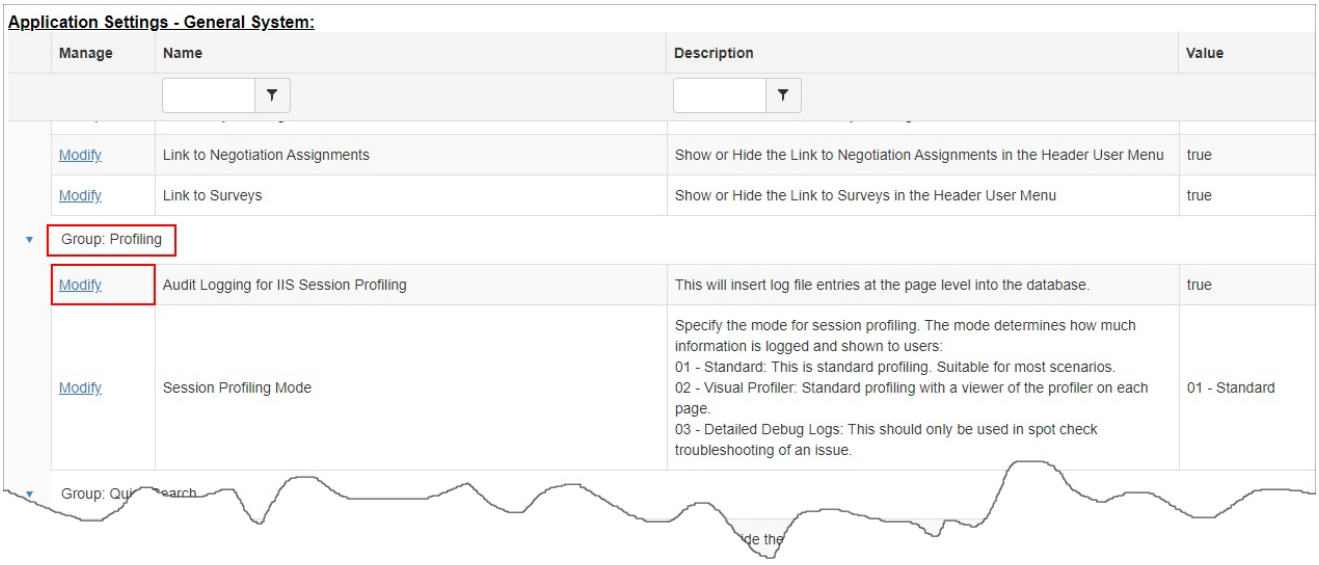


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Then from the Select Configuration Group dropdown box, select **General System**.

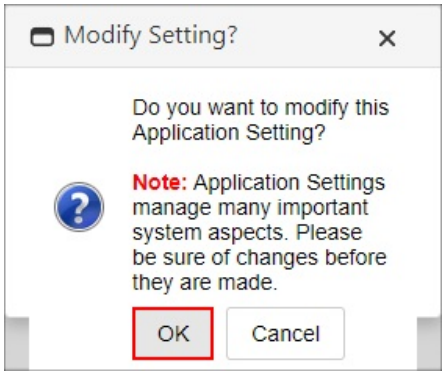


Scroll down to Group: Profiling and click **Modify** next to Audit Logging for IIS Session Profiling.

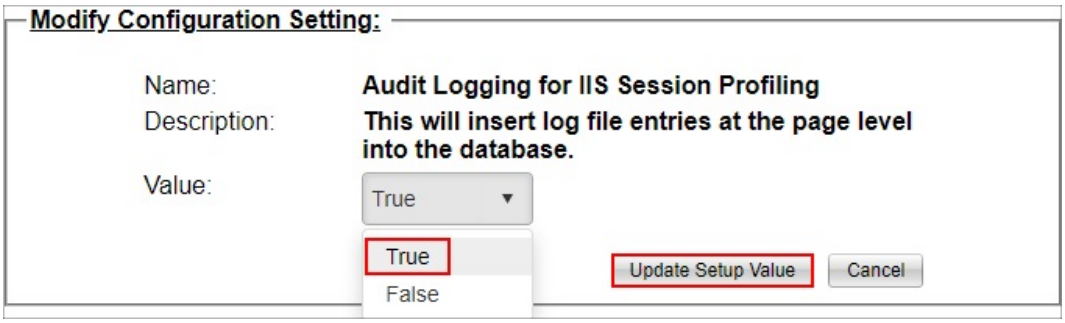


A prompt will appear, asking you if you are sure you want to modify this Application Setting. Click **OK** to advance.

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In the Value dropdown box, select **True** from your allotted choices, and click **Update Setup Value** to apply the change. Now Session Performance will be available as an additional tool at the user's disposal.



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Temporary System Lockout

Temporary System Lockout

Temporary System Lockout

System Administrators may configure a temporary lockout period for users so that system maintenance or other schedule activities may commence without users in the system.

There are two steps for configuration/enabling.

To Configure the System Lockout

1. Click **Manage/Setup**, **Application Configuration**, then **Config Settings**.

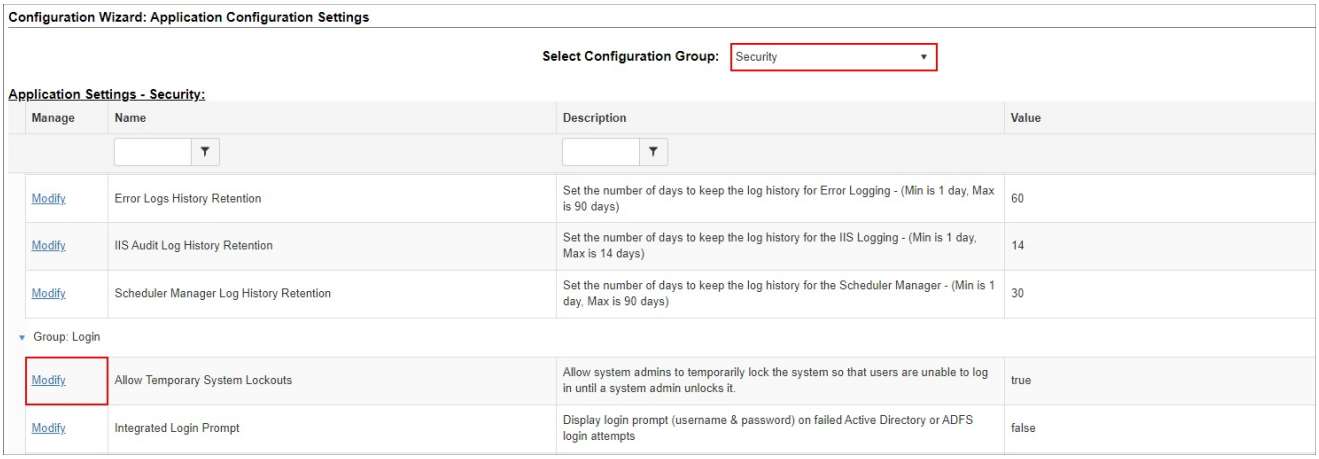


2. In the Select Configuration Group dropdown, select **Security**

3. Under the Group: Login section, click **Modify** next to the Allow Temporary System Lockouts

4. Make sure this setting is set to **True**

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To Create a System Lockout

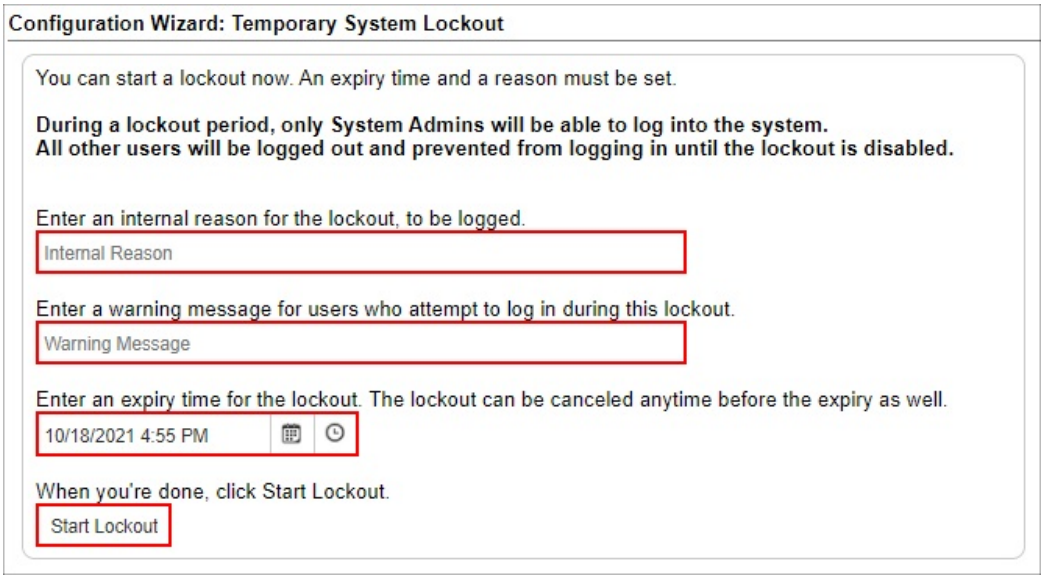
5. Click **Manage/Setup, Application Configuration**, then **Temporary System Lockout**



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6. From here, System Admins will have to enter an Internal Reason for the lockout, as well as a Warning Message for users who attempt to log in during the lockout. System Admins must also set an expiry time for the lockout (the lockout may be canceled anytime before the expiry time)

7. When finished, click **Start Lockout**



NOTE: Please assure users of a lockout before configuration, as progress will not be saved upon lockout.

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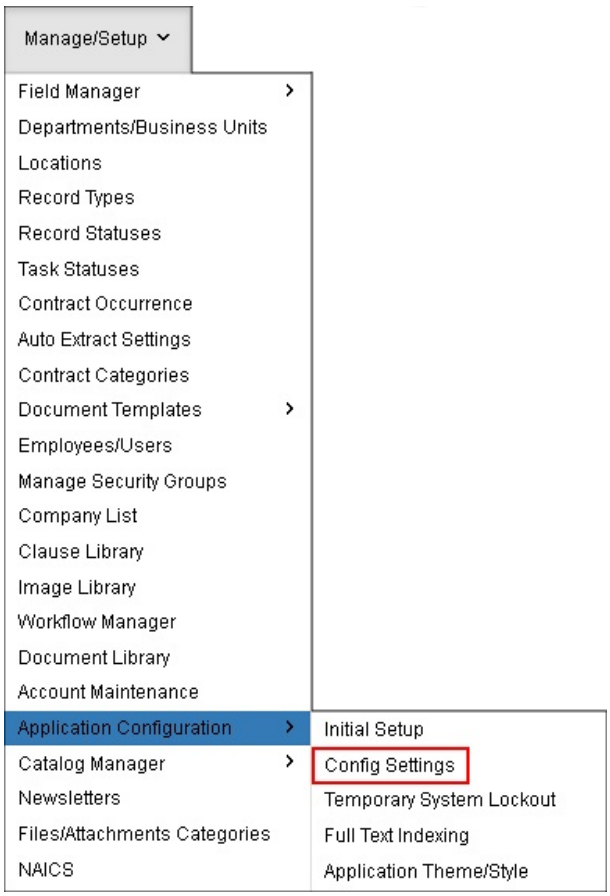
Online Document Editing

Online Document Editing

Online Document Editing

System Administrators may disable and enable the ability to create and edit online documents on a Record Details screen.

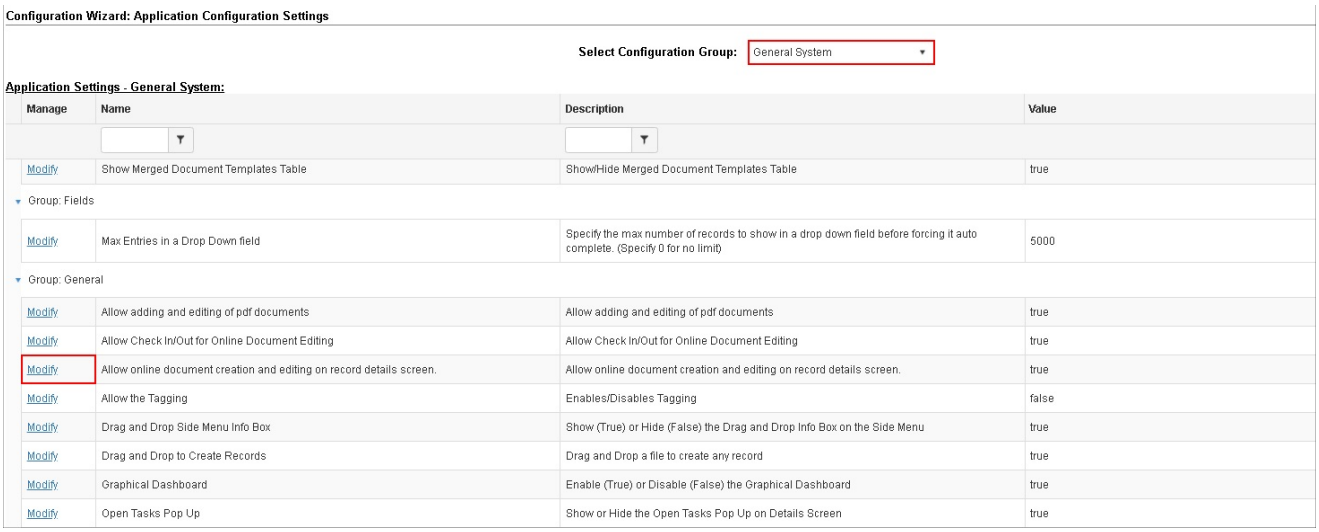
1. To toggle this, click **Manage/Setup**, **Application Configuration**, then **Config Settings**.



2. From the Select Configuration Group, select **General System**.

3. Click **Modify** next to the option Allow online document creation and editing on record details screen.

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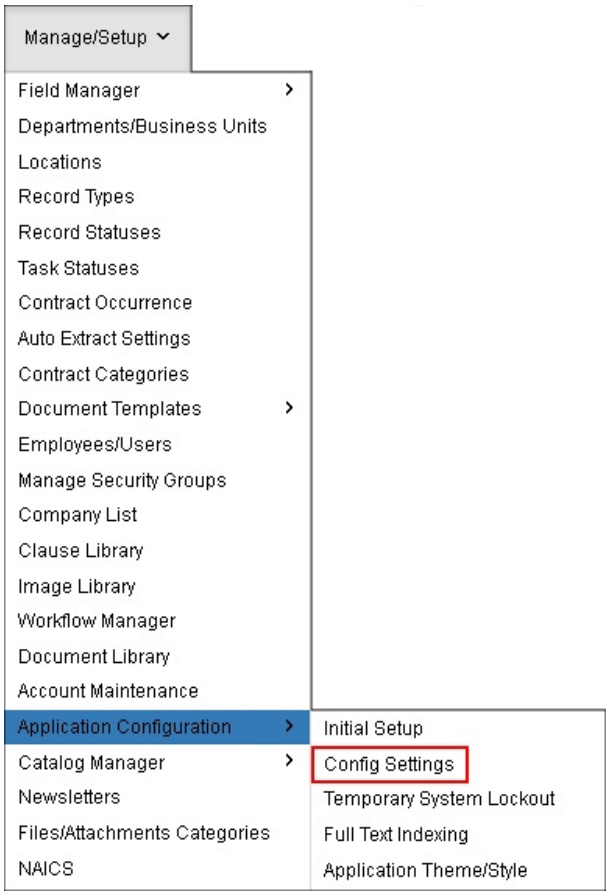
4. Change to **True/False** as desired.

Online Document Editor's Track Changes Functionality

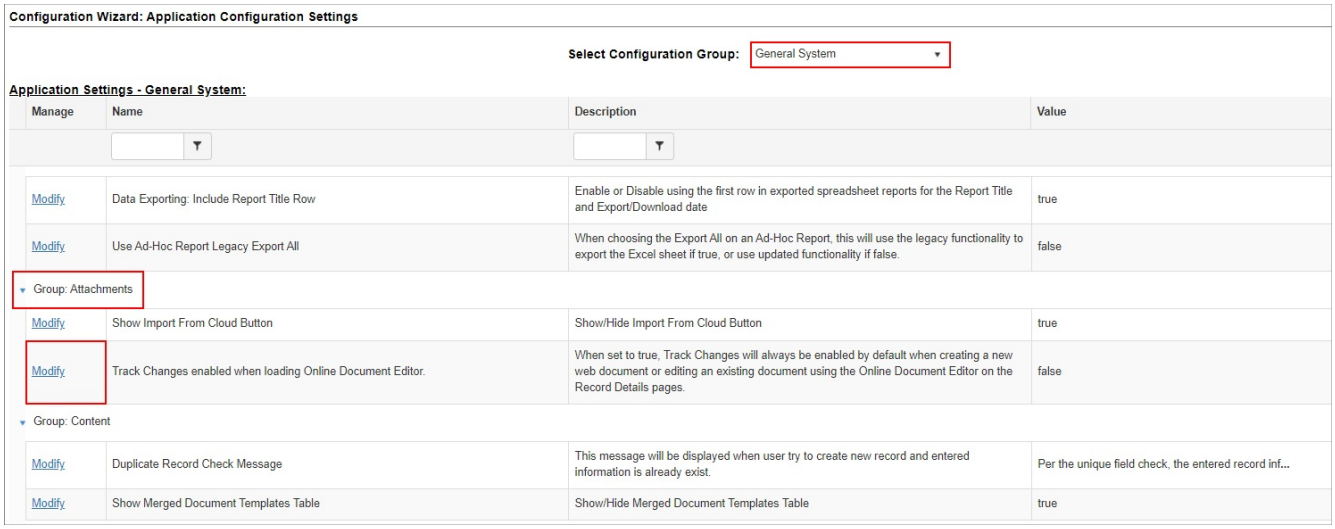
System administrators may choose to have the default setting for track changes on the Online Document Editor, with the **default set to True.** *If* the default setting is true, track changes cannot be disabled within the Online Document Editor. To change this setting:

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1. Click **Manage/Setup**, **Application Configuration**, and **Config Settings.**

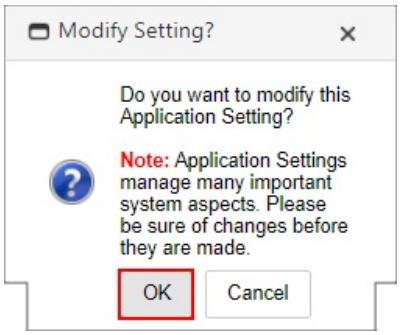


2. Select the Configuration Group of **General System**. This setting is located under **Group: Attachments**. Specifically, this option is called "Track Changes enabled when loading Online Document Editor.". To change the setting, click **Modify**.

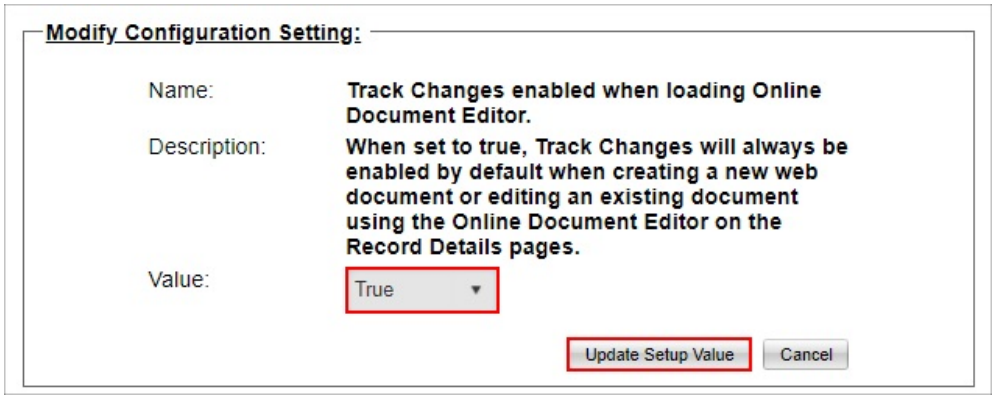


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3. The system will ask the admin if they would like to change the setting. Click **OK**.



4. Toggle the value as needed. When finished, click **Update Setup Value**.



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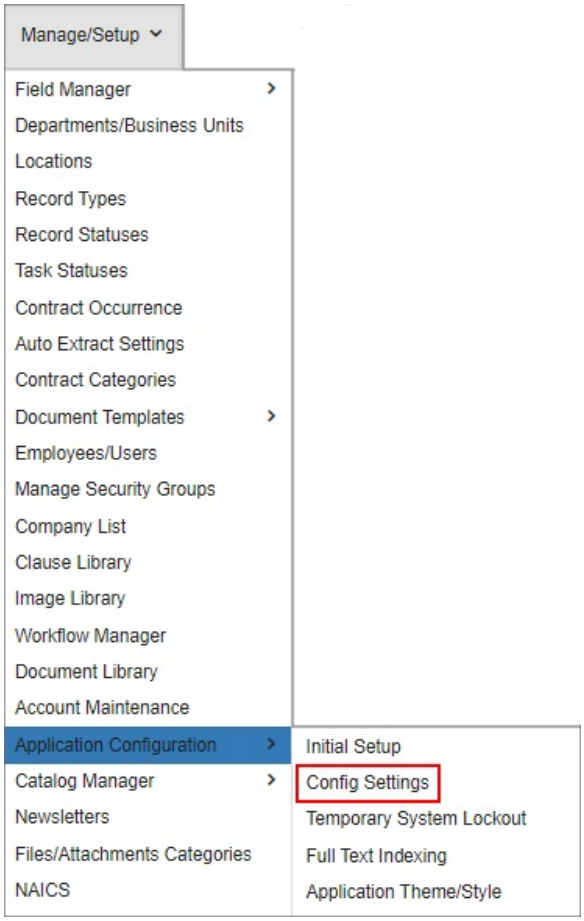
App Config: Overview

App Config: Overview

AppConfig: Overview of the Application Configuration

Config Settings

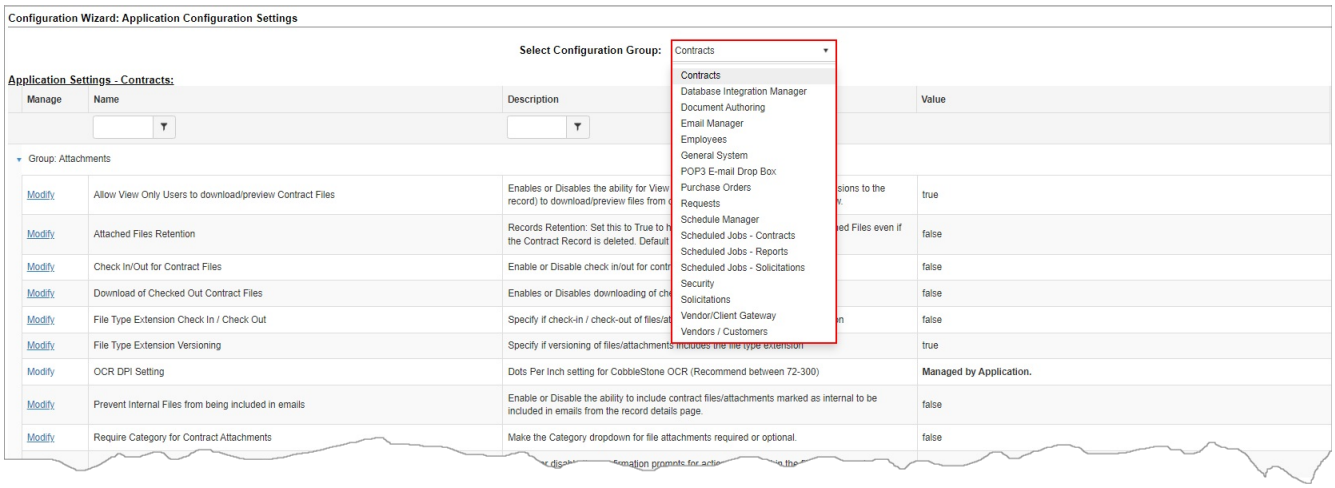
To access the Configuration Wizard, navigate to the **Manage/Setup** top menu item and select **Application Configuration** > **Config Settings**.



This screen is used to manage many of the areas of configuration throughout the Contract Insight Application. Each of these areas is broken up into a configuration group and displayed in the configuration group drop down box on this page.

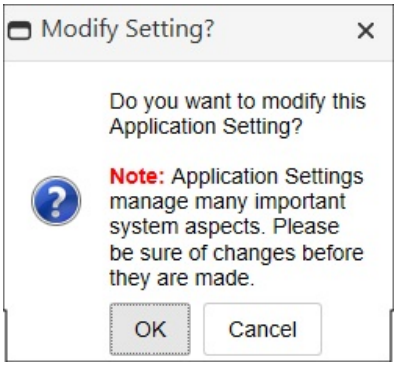
The Group Name, Name of the Application Setting, Description of what the setting does, and the current value of the setting display in the grid.

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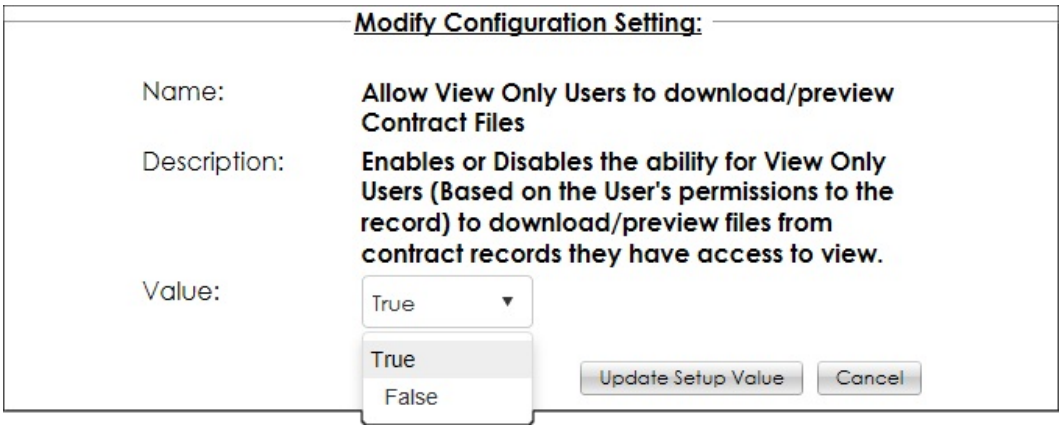


Note: if your organization has not purchased Optional Add-On Modules, then the Configuration Group menu options will appear differently than the image above.

To modify any of the configuration items, click **Modify** for the desired item. A prompt ensuring that modification of the selected configuration item was intended appears.



Upon clicking **OK**, the application setting's information displays where and admin can view the full name and description of the setting. Change the value of the setting using the **Value** drop down menu.



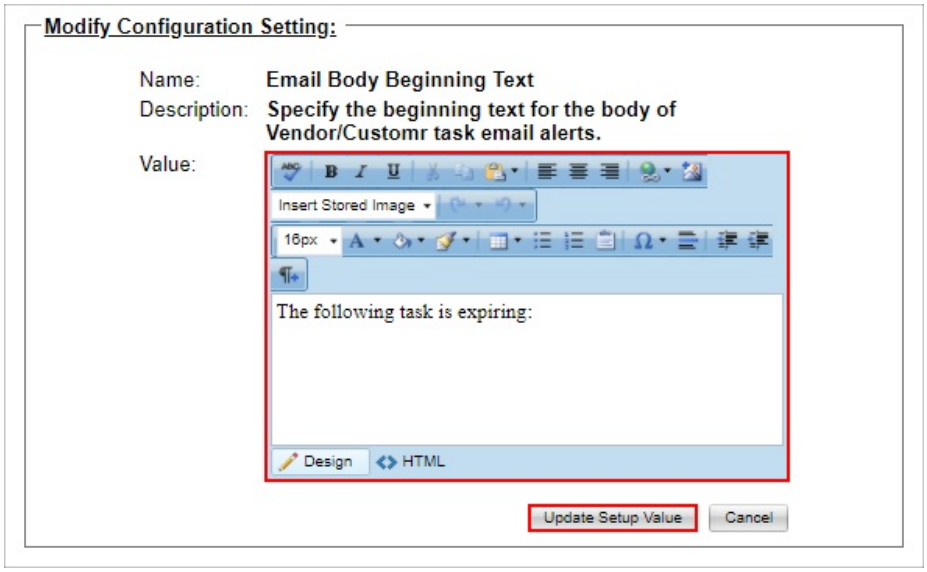
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Once you have made the desired change to the application configuration item, click **Update Setup Value** to save the change; click **Cancel** to cancel changing the setting's value.

Some of the Application Settings allow system administrators to change text/display headers for features in the Contract Insight application using a rich-text Word-like HTML text editor:



To edit the text/value for these settings, click **Modify** for the line item. This will open the **Modify Configuration Setting** screen where an admin can add/edit the text for the field as well as display images (see the Image Library Wiki page for more information about uploading and saving images for the Application Configuration settings).



Note that all application configuration settings can be modified by clicking **Modify** for the line item to manage. Use caution when modifying the configuration settings because these application settings manage and run many of the important aspects of the Contract Insight application.

Please see the additional Wiki pages in the **Application Configuration Section** for a breakdown and description of each Configuration Group.

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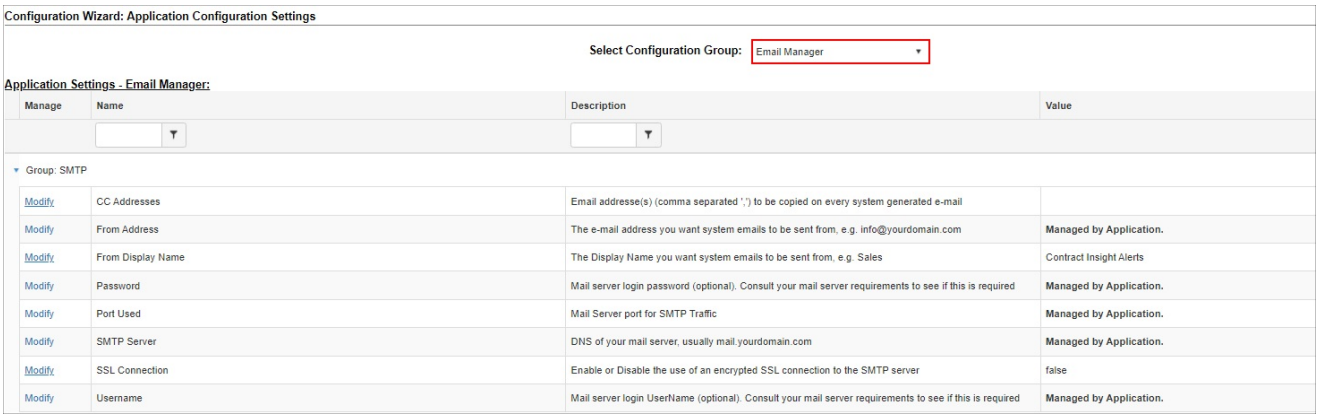
Configuration Group: Emailer/Email Manager

Configuration Group: Emailer/Email Manager

Application Configuration: Config Settings

Configuration Group: Email Manager

The Email Manager configuration group includes application configuration settings for the basic setup and management of the Email alerts that are sent out of your Contract Insight application.



CC Addresses: As a comma separated list, the addresses listed in this setting are copied on email messages originating from Contract Insight.

From Address: This setting is used to specify and set the **From** email address from which email messages are sent.

From Display Name: The display name for email addresses originating in Contract Insight.

Password: This setting is used to specify and set (optionally) the Mail server login password. You should consult your organization's mail server requirements to see if this is required.

Port Used: This setting is used to specify and set the Mail Server port for SMTP traffic.

SMTP Server: This setting is used to specify and set the DNS of your organization's mail server (usually mail.yourdomain.com).

Username: This setting is used to specify and set the Mail server login username (optionally). You should consult your organization's mail server requirements to see if this is required.

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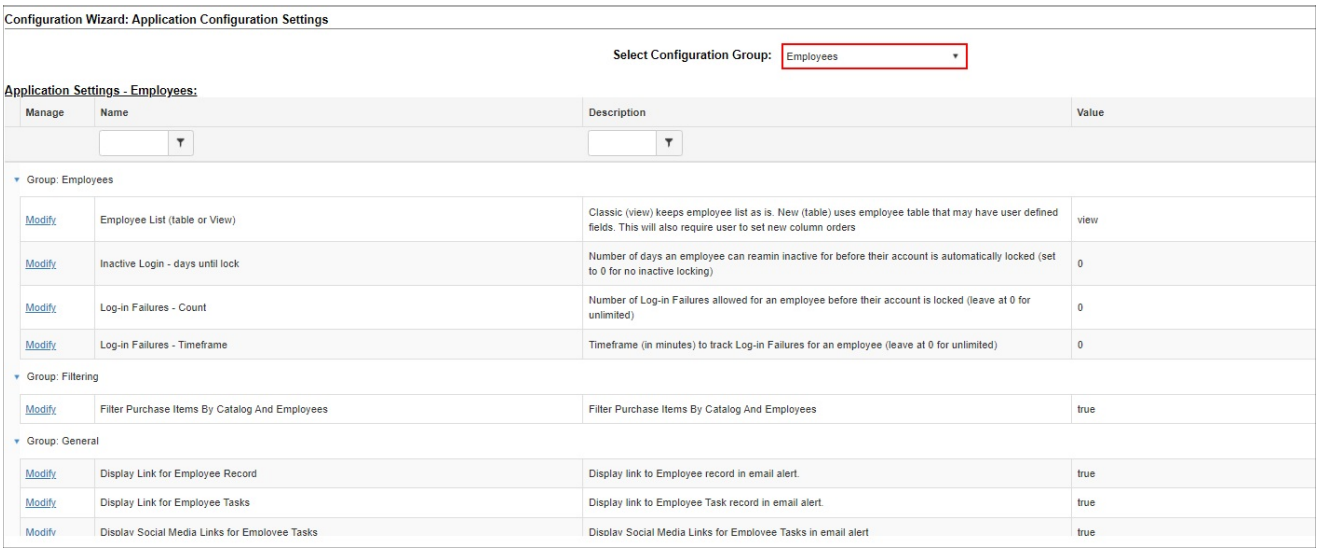
Configuration Group: Employees

Configuration Group: Employees

Application Configuration: Config Settings

Configuration Group: Employees

The **Employees** configuration group includes application configuration settings for Employee password attempts and filtering of purchase order items by catalog for employees.



Group: Employees

Employee Inactive Login - days until lock: This setting allows you to define an allowed period of account inactivity (no logins) from the system. Setting to 0 (zero) will disable this configuration setting.

Employee Log-In Failures- Count: This setting allows you to set a maximum number of log-in failures allowed for an employee before their account is locked.

Employee Log-In Failures- Timeframe: This setting allows you to set a time frame in minutes to track the log-in failures for an employee before their account is locked.

Group: Filtering

Filter Purchase Items by Catalog and Employees: Set this option to True to insist on filtering via assigned catalog for purchase orders. This settings is only applicable is using the optional **Purchase Order module**.

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Group: Tasks

Display Link for Employee Tasks: Display link to Employee Task record in email alert.

Email Body Beginning Text: Specify the beginning text for the body of Employee task email alerts.

Email Body Ending Text: Specify the ending text for the body of Employee task email alerts.

Email Subject Line: Specify the text to append to the subject line of Employee task email alerts.

Employee Tasks Email Timer: Set how often Employee related task email alerts are sent (in minutes) - Specify 0 to disable

Employee Tasks Escalation Timer: Set how often escalations to Employee tasks are checked (in minutes) - Specify 0 to disable

Include Email Info: Display Employee information on all Employee related task email alerts.

Reply To Address for Email Tasks: Specify the Email Address to be used as the Reply To on all scheduled Employee related Task e-mail alerts.

Group: Timers

Survey Notifications Timer: Set how often the Survey Notifications are checked to send out survey email links

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Configuration Group: Pop3 E-Mail Drop Box

Configuration Group: POP3 E-mail Drop Box

Application Configuration: Config Settings

Configuration Group: POP3 E-Mail Drop Box

E-mail Inbox Monitoring [Formerly: E-mail Drop Box]

The E-mail Inbox Monitoring tool helps monitor a dedicated email inbox using POP e-mail protocol, uses logic to identify emails based on the subject-line text, and imports the email and attachments to Contract Insight.

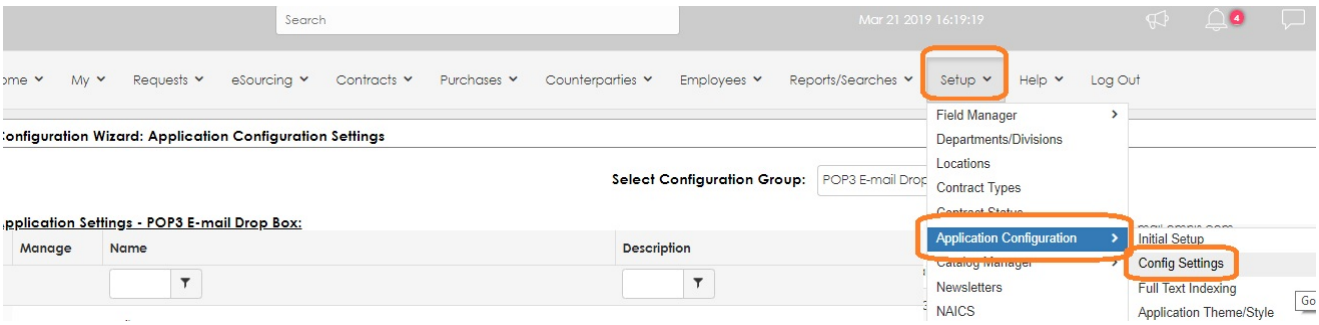
E-mail Inbox Monitoring Requirements

E-mail Inbox Monitoring requires several items which may need to be supplied by your organization's IT department:

1. Contract Insight Enterprise Software License;
2. Dedicated POP 3 E-mail box that is accessible by the Contract Insight Software application;
3. POP 3 Server Name – provided by your IT Team or E-mail Provider;
4. The POP 3 credentials;
    1. POP 3 User Name – provided by your IT Team or E-mail Provider;
    2. POP 3 E-mail Address – provided by your IT Team or E-mail Provider;
    3. POP 3 Password – provided by your IT Team or E-mail Provider;
    4. POP 3 Port – provided by your IT Team or E-mail Provider; typically, PORT 110;
5. System Administrator access to Contract Insight Enterprise

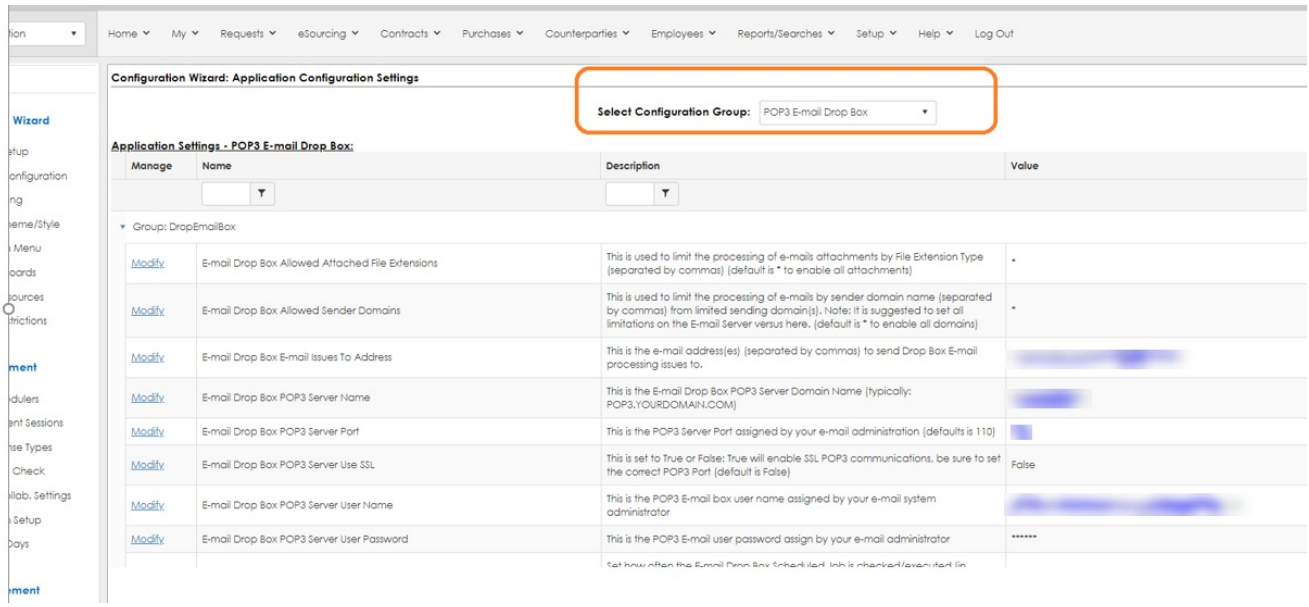
E-mail Inbox Monitoring Configuration

E-mail Inbox Monitoring can be configured by going to Setup -> Application Configuration -> Config Settings within Contract Insight.

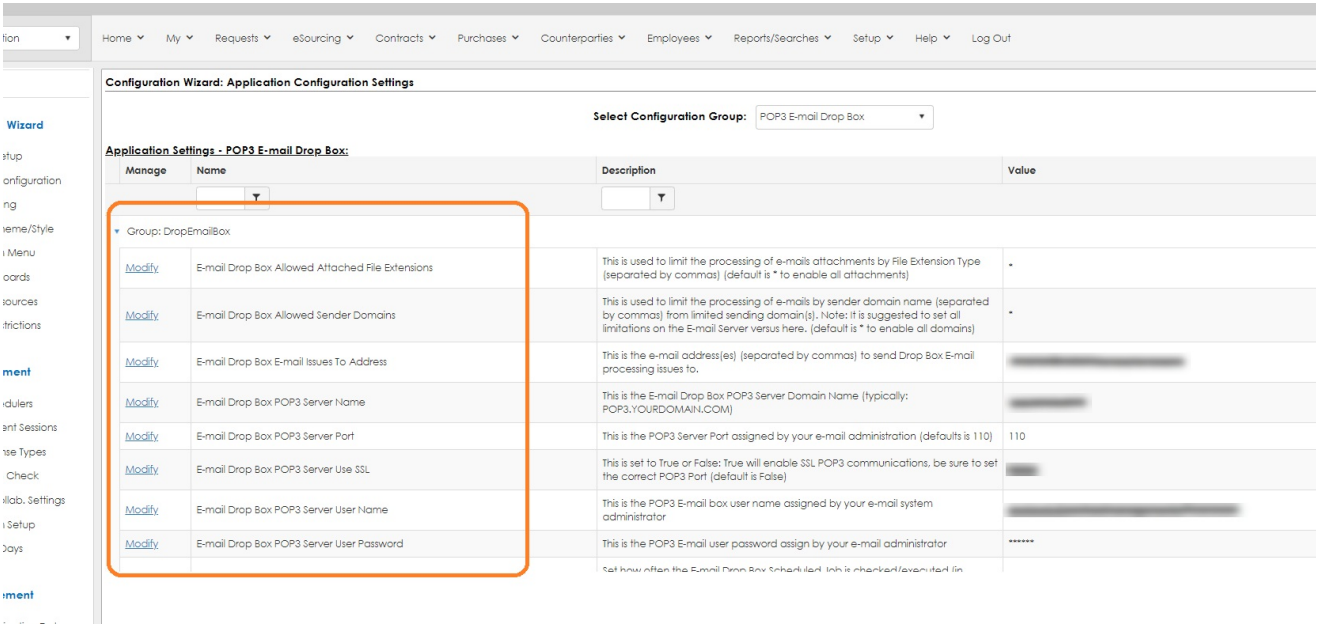


Once the Config Settings page loads, select the **POP3 E-Mail Drop Box** item from the Configuration Group:

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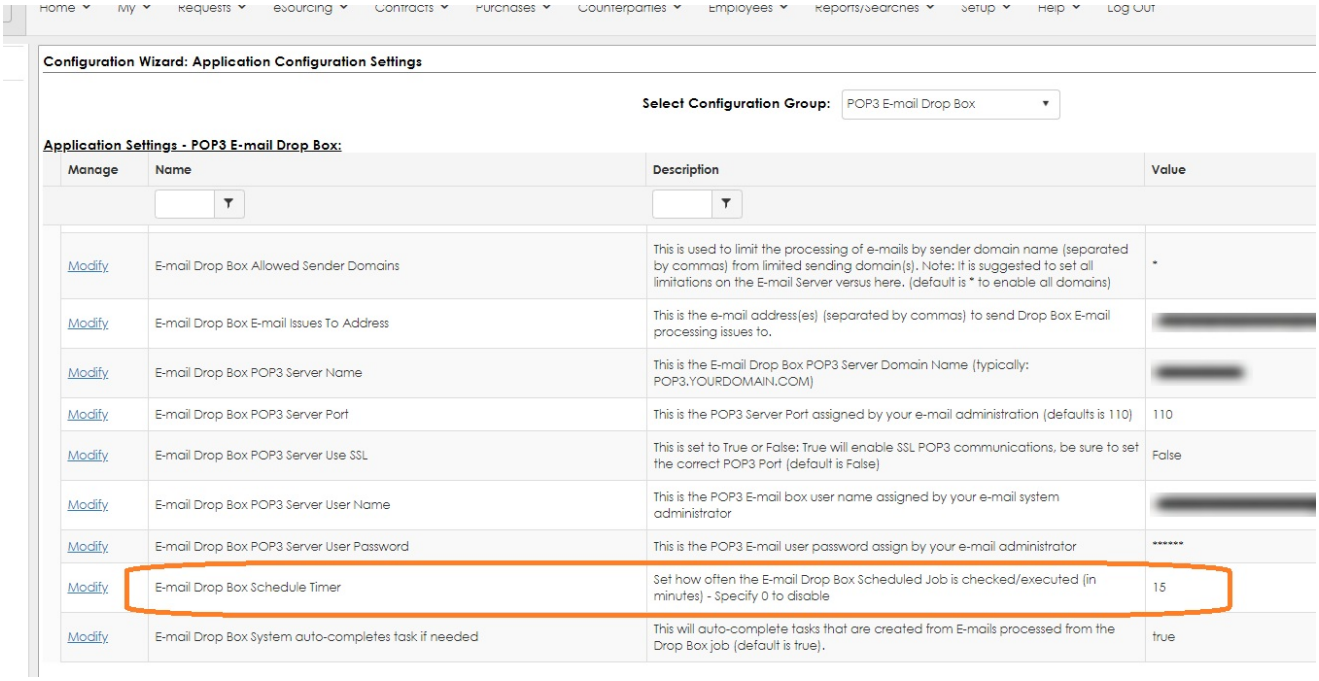


Proceed with configuring the POP3 E-mail settings using the following information (provided by your IT Team or E-mail Provider):



1. POP 3 Server Name – provided by your IT Team or E-mail Provider;
2. The POP 3 credentials;
    1. POP 3 User Name – provided by your IT Team or E-mail Provider;
    2. POP 3 E-mail Address – provided by your IT Team or E-mail Provider;
    3. POP 3 Password – provided by your IT Team or E-mail Provider;
    4. POP 3 Port – provided by your IT Team or E-mail Provider; typically, PORT 110;
3. Set the Scheduler in minutes: typically, 30 minutes is good.

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The e-mail import job runs on a schedule as defined in the configuration settings and checks 'un-read' e-mail messages in the POP3 e-mail box.

NOTE: If needed, a System Admin may manually run the E-mail Drop Box Scheduler Timer job via the Manage Schedulers screen which can be accesses from side menu of the Application Configuration -> Config Setting page.



Ensure the POP3 e-mail account is monitored by a legal professional for any e-mail messages that do not make it into the system. It may also be beneficial to have an e-mail rule that automatically forwards the e-mail to an alternate e-mail address to be read and reviewed by a legal professional.

NOTE: Be aware that, if an e-mail is read via the POP3 account, the e-mail import job may not import that specific e-mail message or attachment.

Using E-mail Inbox Monitoring

Existing Contract Insight Records

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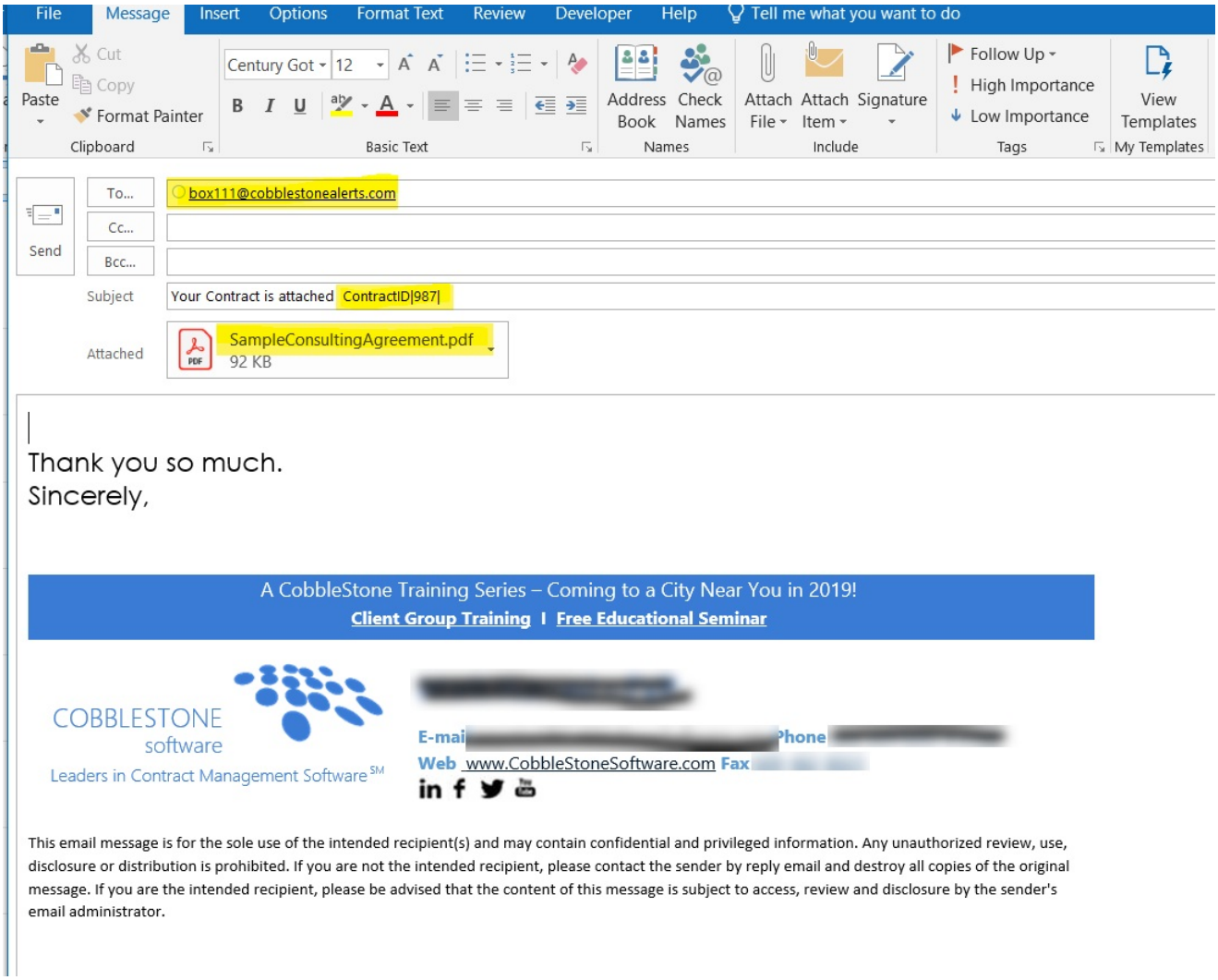
Once the POP3 e-mail box is configured and tested, a user may send e-mails with attachments from Contract, Vendor/Customer, Employees, Request, Solicitations, and Purchase Order records based on the record ID.

For example, sending an e-mail to the configured POP3 account with the following text in the subject will attach the e-mail and files to its record: **ContractID|345|**

Note that we have the text **ContractID** then a **pipe character** followed by the Contract record **ID number** followed by a **pipe character** with no spaces.

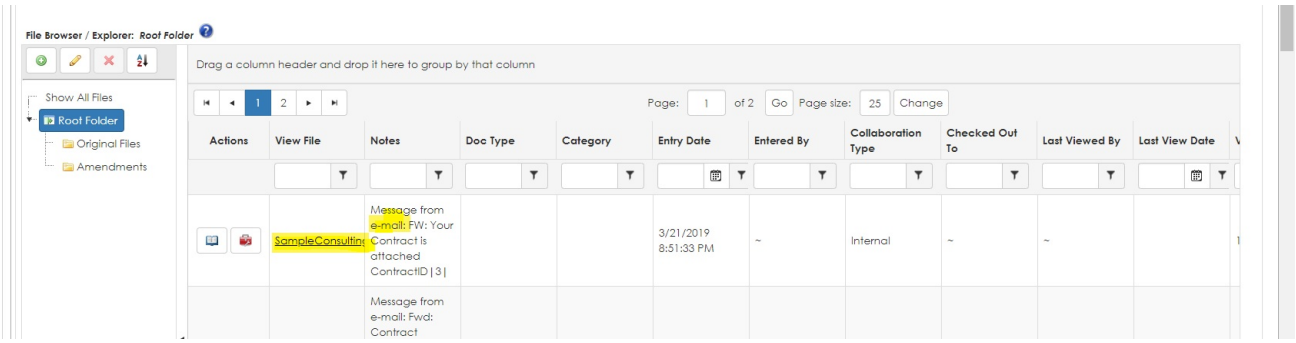
To send an e-mail to a Vendor record with the Vendor ID of 654, we would use **VendorID|654|** in the subject line. You may add additional text in the subject line.

Below is an example e-mail to the box111@cobblestonealerts.com. If configured correctly, the email will be imported and the attached PDF will be attached to Contract Record ID 987. In addition, it will add a task alert to the Contract Record's primary assigned employee to alert the employee there is a new file attached to the record.



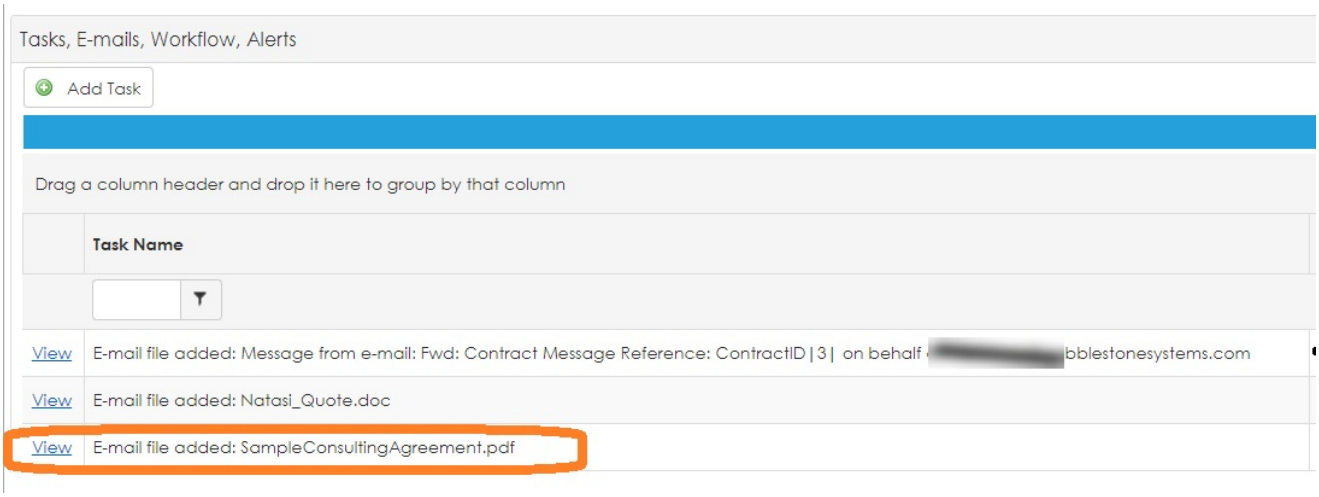
After the e-mailer job runs, the file is attached to the Contract record as seen below:

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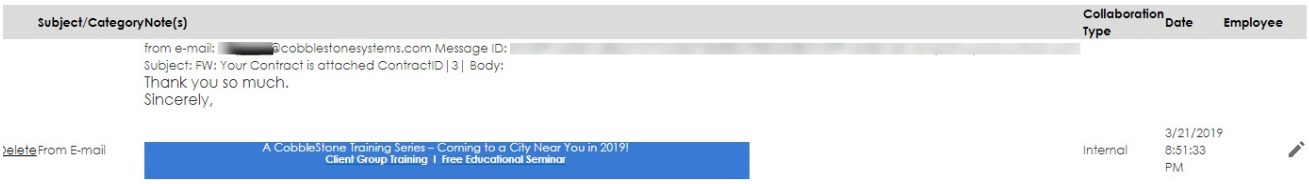


A task is also added to the Contract record to alert the employee a new file was added.

NOTE: The task can be set to auto-complete in the POP3 E-mail Drop Box settings discussed in the E-mail Inbox Monitoring Configuration section above.



The first part of the e-mail message is added to the Contract record's notes section.



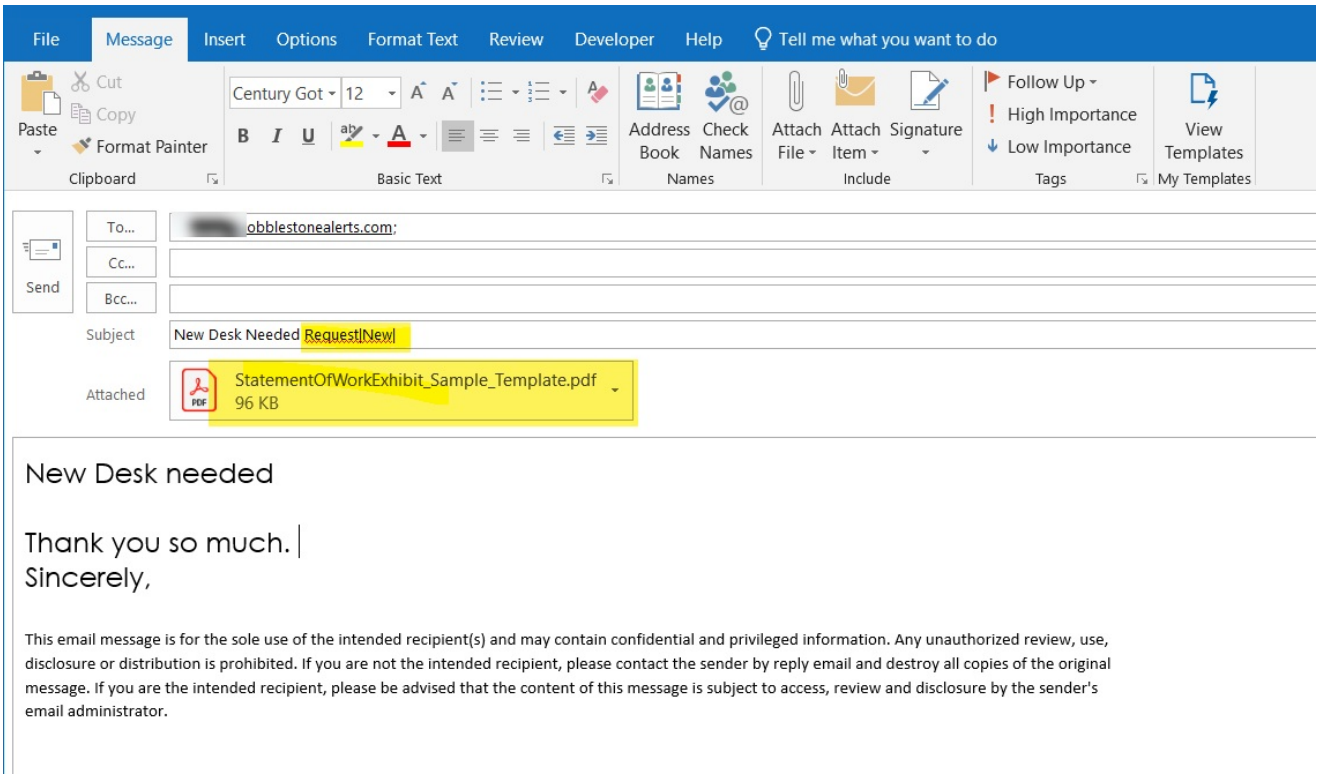
Create New Record From E-mail

It is possible to create a new record in Contract Insight from an email by using **RecordType|new|** in the Subject line. For example, to have the E-mail Inbox Monitoring tool create a new Request/Requisition Record and attach a file in Contract Insight, use the text **Request|new|** in the Subject line of the email.

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NOTE: Be cautious using this feature as any subsequent email sent to the e-mail box will create new records if "new" isn't replaced by the RecordID. It may be beneficial to lock the e-mail address down to just internal employees as advised by your IT department.

In the example below we are sending an email to create a new Request/Requisition Record for acquiring a new desk.



Learn more about the Email Inbox Monitoring tool by contacting your Cobblestone Software Account Representative.

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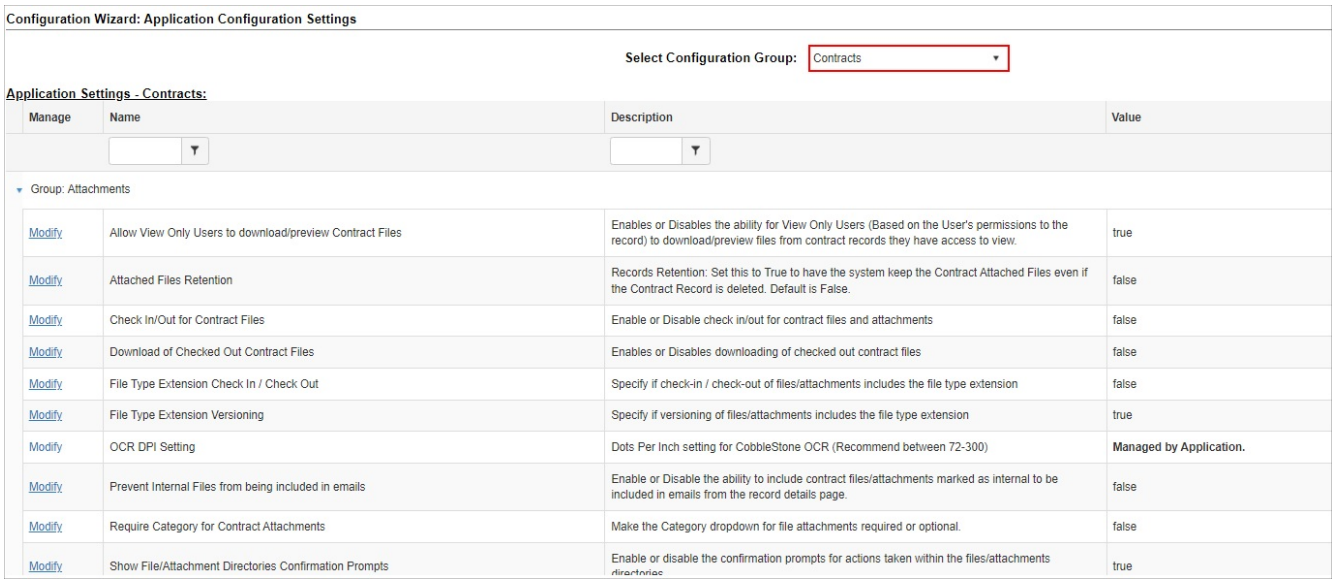
Configuration Group: Contracts

Configuration Group: Contracts

Application Configuration: Config Settings

Configuration Group: Contracts

The **Contracts** configuration group includes application configuration settings for the basic setup and management of the Contract Details screen and its components.



Configuration Wizard: Application Configuration Settings

Select Configuration Group: Contracts

Application Settings - Contracts:

Manage	Name	Description	Value
Group: Attachments			
Modify	Allow View Only Users to download/preview Contract Files	Enables or Disables the ability for View Only Users (Based on the User's permissions to the record) to download/preview files from contract records they have access to view.	true
Modify	Attached Files Retention	Records Retention: Set this to True to have the system keep the Contract Attached Files even if the Contract Record is deleted. Default is False.	false
Modify	Check In/Out for Contract Files	Enable or Disable check in/out for contract files and attachments	false
Modify	Download of Checked Out Contract Files	Enables or Disables downloading of checked out contract files	false
Modify	File Type Extension Check In / Check Out	Specify if check-in / check-out of files/attachments includes the file type extension	false
Modify	File Type Extension Versioning	Specify if versioning of files/attachments includes the file type extension	true
Modify	OCR DPI Setting	Dots Per Inch setting for CobbleStone OCR (Recommend between 72-300)	**Managed by Application.**
Modify	Prevent Internal Files from being included in emails	Enable or Disable the ability to include contract files/attachments marked as internal to be included in emails from the record details page.	false
Modify	Require Category for Contract Attachments	Make the Category dropdown for file attachments required or optional.	false
Modify	Show File/Attachment Directories Confirmation Prompts	Enable or disable the confirmation prompts for actions taken within the files/attachments directories	true

Attachments Group:

Contract Files: Allow "Linked" option for attachments: This setting enables or disables whether users will be allowed to link files/attachments to an external location. Setting this item to True allows users to link.

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Attached Files Retention: Set this setting to True to have the system keep the Contract Record Files/Attachments if the Contract Record should be deleted.

Contract Files: Check In/Out for Contract Files: This setting turns the file/attachment Check In/Check Out on and off. Setting this item to True turns the Check In/Check Out feature on. See the Attachment Check-In/Check-Out Wiki page for more information about this feature.

Contract Files: Download of Checked Out Contract Files: If this Configuration Setting for the Files Check In/Check Out is set to True, users can download and view attachments/files that have been checked out.

Contract Files: File Type Extension Check In / Check Out: This setting, if set to True, specifies if the versioning of files/attachments for Contract Records includes the file type extension.

File Type Extension Versioning: This setting allows System Administrators to specify whether versioning of files/attachments includes the file type extension.

Calculations Group:

Contracts: Budget Alert Percentage: Set the percentage (in decimal format) of when to trigger a Budget Task Alert email based on the actual Contract Costs (in Financials). Default is '.9' for 90%. Set to '0' to disable Budget Alert Percentage alerts.

Contracts Records: Auto Calculate the Contract Amount: If set to True, this setting will auto-calculate the Contract Amount from the Price/Cost Schedule line items on the Contract Record.

Contracts Group:

Allow Add Company Box: Select whether or not users will be able to add a vendor/custom from the contract add page via the Add Company Box.

Disable File Uploads with Legal Hold: When a Legal Hold is enabled on a contract record, disable allowing new files to be attached. The default is set to true, which prevents files being attached when legal hold is set to on for a contract record.

Enable Contract Hierarchy: Shows or hides the hierarchy elements on the contract page.

Hide Auto Complete Tasks: Hides the auto complete tasks on the task grid.

Show Check Lists/Milestones Grid on Contract Record: Set to true to show Check Lists/Milestones on Contract Record Screen.

Show Financial Menu Link on Contract Record: Set to true to display the Financials Menu Link on the Contract Record screen.

Show or Hide Assigning Multiple Parties to a Contract Record: Show Assigning Multiple Parties to a Contract Record; default is true to show and allow multi-parties.

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Show Side Menu link for Assigning Additional Departments: Enable/Disable the side menu link for assigning additional departments.

Show Side Menu link for Assigning Additional Employees: Enable/Disable the side menu link for assigning additional employees.

General Group:

Contracts Records: Allow Altering of Contract Types: If set to **True**, this setting allows Contract Type to be altered after initially selecting it on the Contract Add screen. It is recommended to have this setting set to False if your organization is utilizing the **Assign Fields by Contract Type**, as changing the Contract Type after initially selecting it will not reassign the correct fields assigned to the Contract Record to the new Contract Type's field assignments.

Terminology for Contract Records: The text of this setting will be how your organization's Contract Insight application refers to Contracts. If the organization refers to Contracts as Agreements, this setting can be changed to have Contract Insight now match the terminology the organization uses.

One-Off Emails Group:

Append Vendor/Customer Name to Email Subject: This setting enables (True) and disables (False) the appending the vendor name to the end of contract one-off email subject lines.

Searching Group:

Enables Expanded Contract Find by Field: If set to True, this setting allows users to use the Find/Search Contracts screen's **Find by Field** feature to select and search by the Additionally Assigned tables (Employees, Vendors/Customers, Departments, Locations) for the Contract Records.

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Configuration Group: Passwords

Configuration Group: Passwords

Please note that this functionality has been moved into the **Security** Configuration Group

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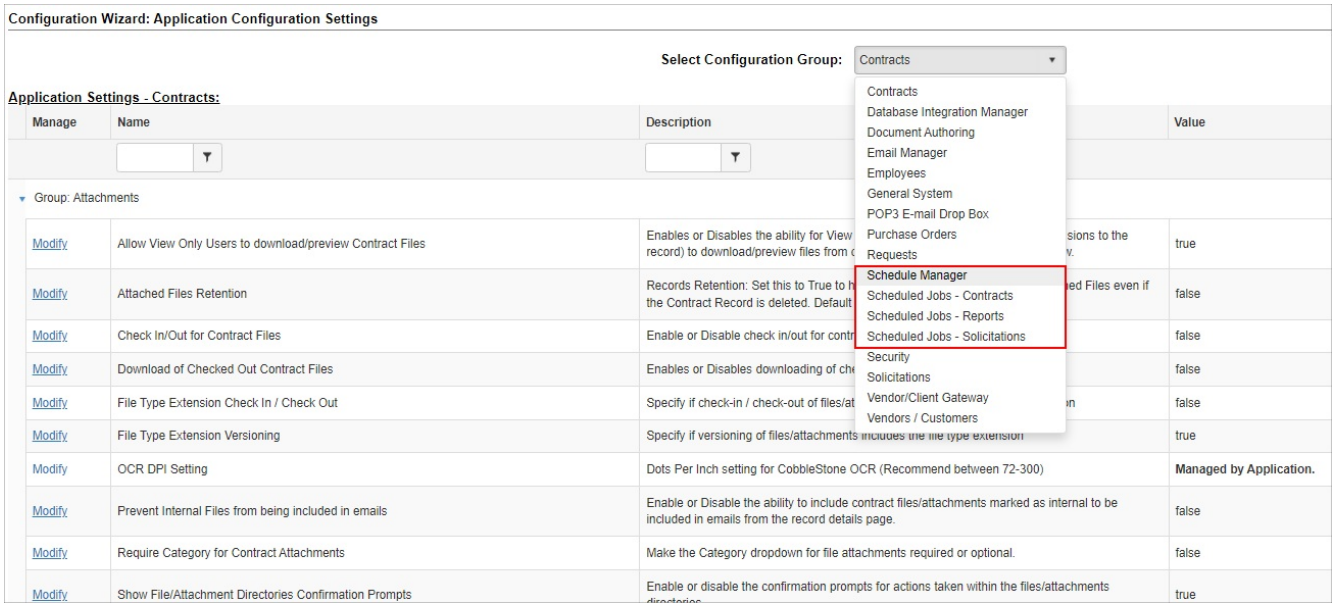
Configuration Group: Schedule Manager

Configuration Group: Schedule Manager

Application Configuration: Config Settings

Configuration Group: Schedule Manager

The **Schedule Manager** configuration group includes application configuration settings for the basic setup and management of the Scheduled Jobs that check and send the emails/alerts for all aspects of the Contract Insight application.



Information about the Schedule Manager as well as the Scheduled Jobs Configuration Groups can be found on the following pages:

01. Schedule Manager
02. Scheduled Jobs: Contracts
03. Scheduled Jobs: Reports
04. Scheduled Jobs: Solicitations

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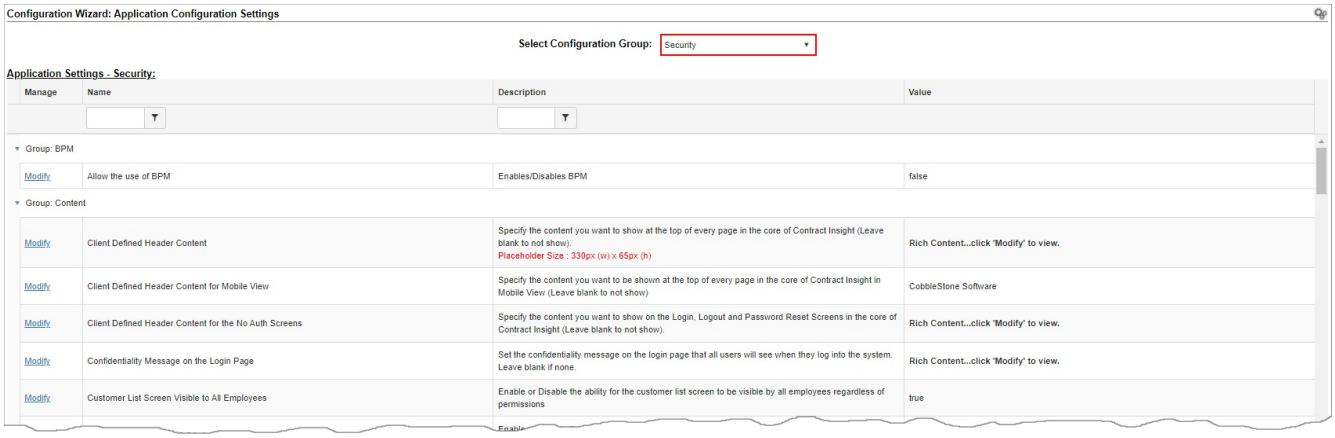
Configuration Group: Security

Configuration Group: Security

Application Configuration: Config Settings

Configuration Group: Security

The **Security** configuration group includes application configuration settings for the basic setup and management of the security features.



Content Group:

Client Defined Header Content: This setting allows you to specify the content via a Microsoft Word-like HTML text editor for the header of every page in Contract Insight. See the App Config: Overview Wiki page for more information about the HTML text editor.

Confidentiality Message on the Login Page: This setting allows you to change and set the confidentiality message on the initial login page that all users will see when they go to login. This setting allows you to add your organization's own confidentiality message using a Word-like HTML text editor. See the App Config: Overview Wiki page for more information about the HTML text editor.

Document Collaboration with Legal Hold: When set to True, this setting allows document package merging and signing for a record set to **Legal Hold**.

Restricted File Types for Upload: This setting allows you to specify (in a comma separated list) the file extensions to be prevented from being uploaded and attached to records.

Email Attachments Group:

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Attachment Expire Days: If using email attachments as links (described below), this setting allows you to set the number of days a link to an attachment will remain valid.

Authenticated Email Download: If set to **True**, this setting allows users to download email attachments without being authenticated.

Email Attachment Type: This setting allows you to specify if emailed attachments sent through Contract Insight are sent as links or if a copy of the file is sent.

Field Validator Group:

Enable Rules-Based Fields Validator: If set to **True**, rules-based field checks for the field validator are enabled.

Enable Required Fields Validator: If set to **True**, a validation message appears at the top of a record if required fields are not completed.

General Group:

Audit Logging form IIS: This setting, when set to **True**, permits the system to insert log file entries at the page level into the database.

CSRF Page Monitor: If set to **True**, this setting enables enhanced Cross Site Request Forgery for pages within Contract Insight. This setting may not be compatible with some VPN or SSO connections.

Display Friendly Error Messages: If set to **True**, this setting enables the display of friendly error messages and storing of error logs.

Force HTTPS (SSL): If set to **True**, only HTTPS links will be used for Contract Insight. For organizations hosting their own server for Contract Insight, ensure you have your Secure Certificate (SSL Cert) installed on your server.

Payment Types to Pay Vendors/Suppliers: This setting allows you to specify (in a comma separated list) the payment types for paying vendors and suppliers.

Show in External Frames/Sites: If set to **True**, this setting allows Contract Insight to be displayed in external site frames.

Web Services Authentication Code: This setting sets the Authentication Code used to access Contract Insight Web Services if they have been purchased by your organization.

Log Retention Group:

Data Import Manager Log History Retention: With this setting, set the number of days to keep the log history for the Data Import Manager.

DBI Logs History Retention: With this setting, set the number of days to keep the log history for the Database Integration Manager.

Error Logs History Retention: With this setting, set the number of days to keep the log history for Error Logging.

IIS Audit Log History Retention: With this setting, set the number of days to keep the log history for IIS Logging.

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Scheduler Manager Log History Retention: With this setting, set the number of days to keep the log history for the Scheduler Manager.

Login Group:

Application Login Method: This setting specifies the type of login method being used by your organization. Standard authentication is the default login method. Integrated

Integrated Login Prompt: This setting enables, if set to **True**, a login prompt to display requesting a Username and Password if Active Directory login or ADFS login attempts should fail.

Login Page Redirect: Specify if the login page allows for redirecting to a specific Contract Insight page should the user's session time out. Please note that if this setting is set to **True** and a user's session times out, unsaved information will be lost and will need to be re-entered.

Prevent Account Sharing Prompt: This setting allows your organization to enhance security and auditing to prevent multiple simultaneous logins from the same Employee Account.

Redirect URL on User Logout: For use with SSO, the URL for user redirection on sign out of Contract Insight.

Passwords Group:

Encrypt User Passwords: If set to **True**, will encrypt Internal (Employees') AND External (Vendors/Clients for the Vendor/Client Gateway Optional Add-On Module- ONLY if your organization has purchased this Optional Add-On Module will this be affected) passwords in the back-end (database side), which helps conform with client-related sensitive data policies.

Monitor Password Complexity: Enables (True) or Disables (False) the tracking and management of password complexity.

Employee Password Length: If the "Monitor Password Complexity" setting is set to "True", this setting allows you to set the minimum length required for Employee passwords.

Password Requires Alpha (lowercase): If the "Monitor Password Complexity" setting is set to "True", Employee passwords must contain at lease one lowercase letter.

Password Requires Alpha (uppercase): If the "Monitor Password Complexity" setting is set to "True", Employee passwords must contain at least one uppercase letter.

Password Requires Numeric: If the "Monitor Password Complexity" setting is set to "True", Employee passwords must contain at least one number.

Password Requires Special Characters: If the "Monitor Password Complexity" setting is set to "True", Employee passwords must contain at least one special character.

Password Reset Days: This setting allows you to specify the number of days before an Employee is required to reset their password.

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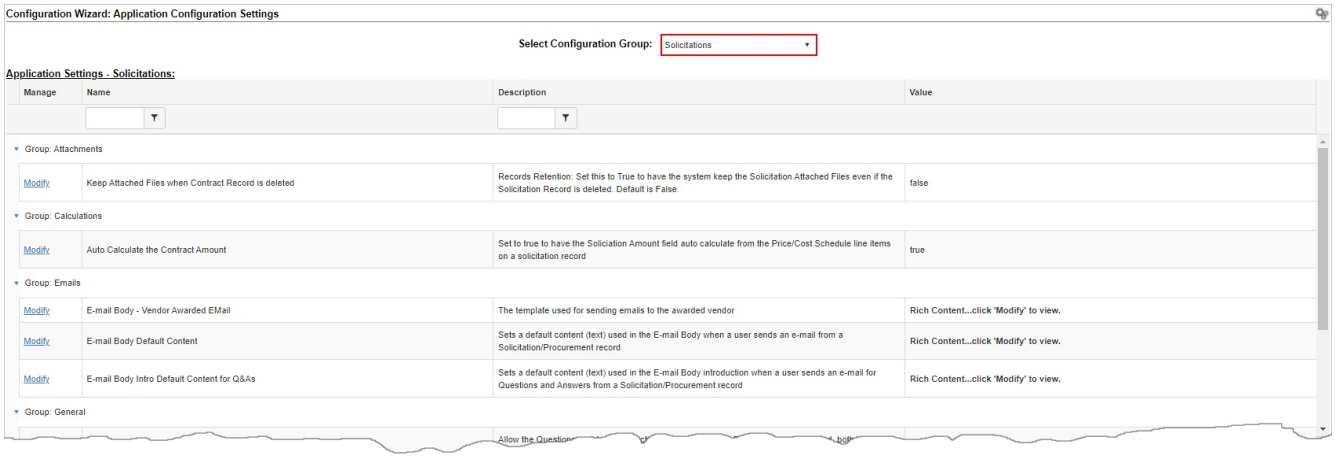
Configuration Group: Solicitations

Configuration Group: Solicitations

Application Configuration: Config Settings

Configuration Group: Solicitations

The **Solicitations** configuration group includes application configuration settings for the basic setup and management of the Solicitation Details screen and it's components.



Attachments Group:

Keep Attached Files When Solicitation Record is Deleted: If set to True, Solicitation Files/Attachments will be kept if the Solicitation Record is deleted.

Calculations Group:

Auto-Calculate the Contract Amount: If set to True, the Solicitation Amount field will auto-calculate from the Price/Cost Schedule line items listed in the Solicitation Record.

Emails Group:

Email Body - Vendor Awarded Email: Allows a System Administrator to set a template used in emails to awarded vendors.

Email Body Default Content: Allows a System Administrator to set the default text content used in the Email body when a user sends an email from a Solicitation/Procurement Record.

Email Body Intro Default Content for Q&As: Allows a System Administrator to set the default text content used in the Email body introduction when a user sends an email for Questions and Answers from a Solicitation/Procurement record.

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Configuration Group: SMS Messaging

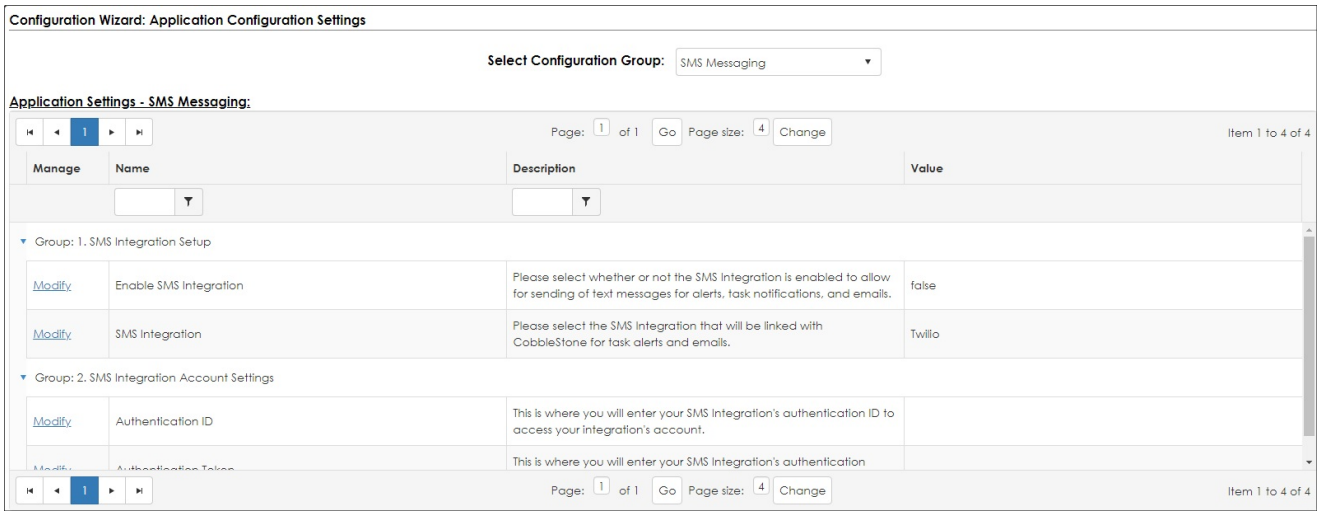
Configuration Group: SMS Messaging

Application Configuration: Config Settings

Configuration Group: SMS Messaging

The SMS Messaging configuration group includes application configuration settings for the basic setup and management of SMS/MMS alerts that are sent out of your Contract Insight application.

Note: Use of SMS/MMS messaging necessitates integration with an outside service provider such as Twillio. Ensure employee mobile phone numbers are registered with the outside account.



Enable SMS Integration: This setting is used to enable/disable sending SMS messages originating from Contract Insight.

SMS Integration: Select the provider with which CobbleStone is integrated for sending SMS messages.

Authentication ID: Enter the SMS integration authentication ID to access the integration account.

Authentication Token: Enter the SMS Integration's authentication token to access the integration's account.

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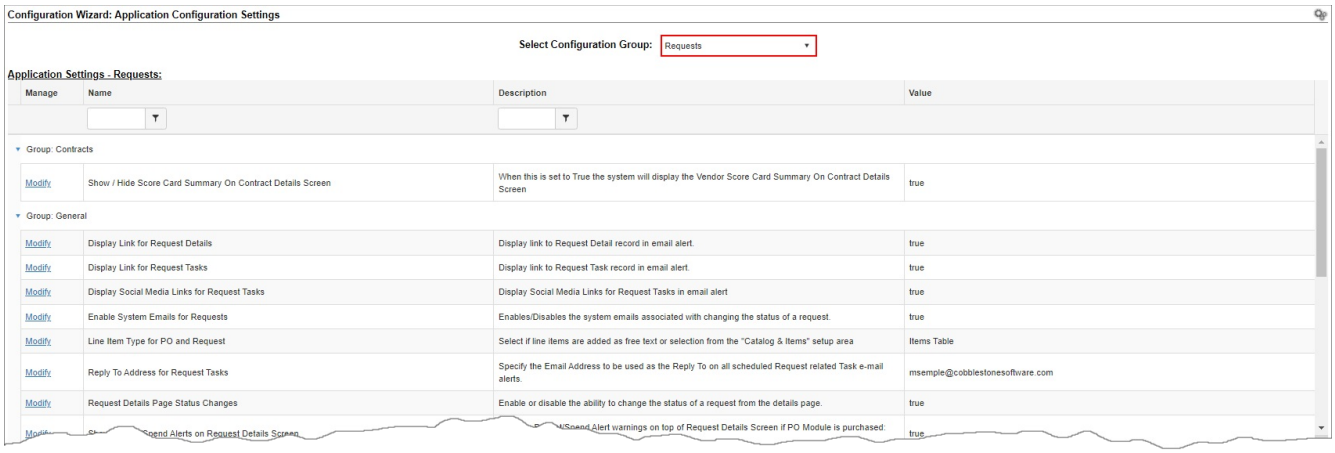
Configuration Group: Requests

Configuration Group: Requests

Application Configuration: Config Settings

Configuration Group: Requests

The **Requests** configuration group includes application configuration settings for the basic setup and management of the Contract Details screen and its components.



Contracts Group:

Copy Contract Request Files to Contract Record: If set to True, Contract Request files are copied to a Contract Record when generated from the request.

Select Request Files when Creating a Contract Record: If set to True, users must manually select the files to copy from a Contract Request to a Contract record when created from the request.

Show/Hide Score Card Summary on Contract Details Screen: If set to True, the system displays the Vendor Score Care Summary on the details screen of a contract created from a request.

General Group:

Display Link for Request Tasks: If set to True, a link on the task alert appears on the email notification.

Enable System Emails for Requests: This setting enables/disables system emails associated with the changing of a request status.

Line Item Type for PO and Request: Select if line items are added as free text of as a selection from the **Catalog & Items** setup area.

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Reply To Address for Request Tasks: Indicate the email address used as the Reply To on all scheduled Request related Task Email alerts.

Show Budget/Spend Alerts on Request Details Screen: If set to True, budget/spend alert warnings display on the top of the Request Details screen provided the Optional Purchase Order Module has been purchased and configured.

One-Off Emails Group:

Append Vendor/Customer Name to Email Subject: If set to True, the vendor's name is appended to the end of request one-off email message subject lines.

Tasks Group:

Email Body Beginning Text: Specify the beginning text for the body of Request related email alerts.

Email Body Ending Text: Specify the ending text for the body of Request related email alerts.

Email Subject Line: Specify the text to append to the subject line of Request Task Email alerts.

Include Request Record Info: Set to True to display request information on all request related task email messages.

Timers Group:

Request Tasks Email Timer: Set how often Request Tasks Email alerts are sent (in minutes). Set to zero (0) to disable.

Request Task Escalation Timer: Set how often escalations to Request Tasks Email alerts are checked (in minutes). Set to zero (0) to disable.

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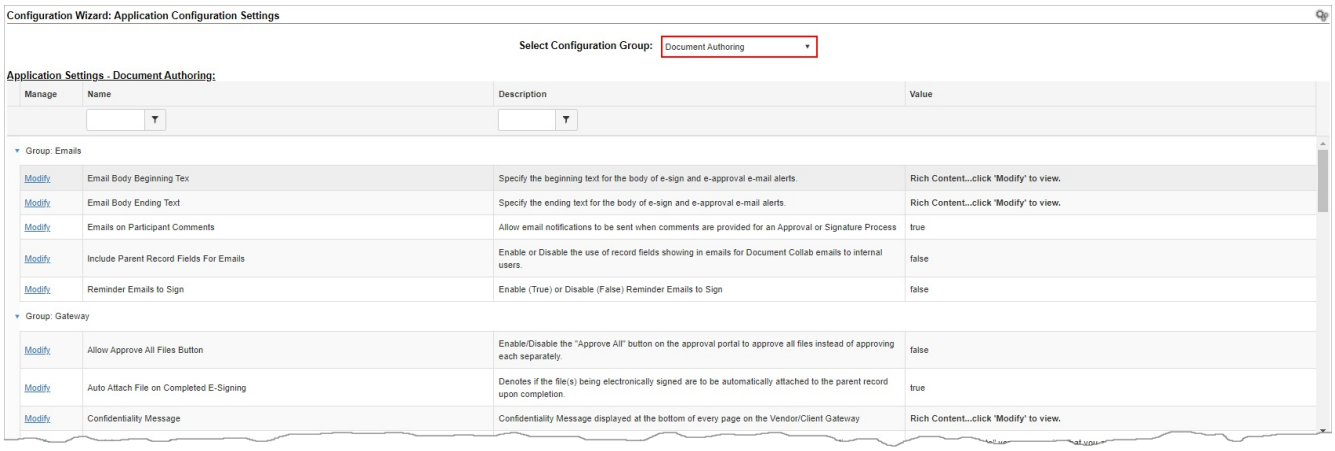
Configuration Group: Document Authoring

Configuration Group: Document Authoring

Application Configuration: Config Settings

Configuration Group: Document Authoring

The **Document Authoring** configuration group includes application configuration settings for the basic setup and management of document collaboration.



Group: Emails

Email Body Beginning Text: Specify the beginning text for the body of e-sign and e-approval e-mail alerts.

Email Body Ending Text: Specify the ending text for the body of e-sign and e-approval e-mail alerts.

Group: Gateway

Allow Approve All Files Button: Enable/Disable the "Approve All" button on the approval portal to approve all files instead of approving each separately.

Auto Attach File on Completed E-Signing: Denotes if the file(s) being electronically signed are to be automatically attached to the parent record upon completion.

Confidentiality Message: Confidentiality Message displayed at the bottom of every page on the Vendor/Client Gateway.

Disclaimer Message for Approvals: Specify the message to be displayed on approval actions within the document collaboration portal.

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Disclaimer Message for Rejections: Specify the message to be displayed on rejection actions within the document collaboration portal.

E-Mails on Participant Viewing: Allow e-mail notifications to be sent to "employees to notify" for an Approval or Signature Process when it is viewed through the Document Collaboration Gateway.

IntelliSign Parent Record Link: Show the button to open record in new tab for EZ Sign Processes (Allows for potential security issue).

Gateway Name/Title: The name your company wants to use for the Document Collaboration Gateway.

Header Content: Set the content of the header for the Document Collaboration Gateway.

Help Page Content: Set the content for the Gateway's Help Page.

Help Page Title: Set the title for the Gateway's Help Page.

Page Title for Approval Processes: Set the text of the Page Title for Approval Processes within the Document Collaboration Gateway

Page Title for Signature Processes: Set the text of the Page Title for Signature Processes within the Document Collaboration Gateway.

Privacy Policy Content: Set the content for the Gateway's Privacy Policy Page.

Privacy Policy Title: Set the title for the Gateway's Privacy Policy Page.

Reset PIN Email Body: Set the additional body information for PIN Reset Emails.

Reset PIN Email Subject: Set the Subject Line for PIN Reset Emails.

Simple Participants E-Approvals: Use simple e-approvals for participants. Simple e-approvals will auto complete the participant's action if the participant has approved all files.

Website Address: Stores the Web Address of the Document Collaboration Gateway (set & maintained by system).

Group: General

Allow Roles/Groups to be E-Signers: Denotes if Roles/Groups can be selected as e-signers.

Allow Third Party Paper Documents: Allow documents/templates to be created for third party paper (external documents).

Always show Auto-Attach Button: Always show the auto-attach button when viewing files for a generated document package.

Append Date to Electronic Signatures: Automatically append the date to all electronic signatures.

Default Signing Type: Specify the default signing type for any files being sent out for signing.

Number of Thumbnails to Load: Specify the Number of Thumbnails to Load.

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Group: Timers

Document Collaboration Mass Sign Email Timer: Set how often Mass Signing Job initial participant email alerts are sent (in minutes) - Specify 0 to disable.

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01. Manage Schedulers

01. Manage Schedulers

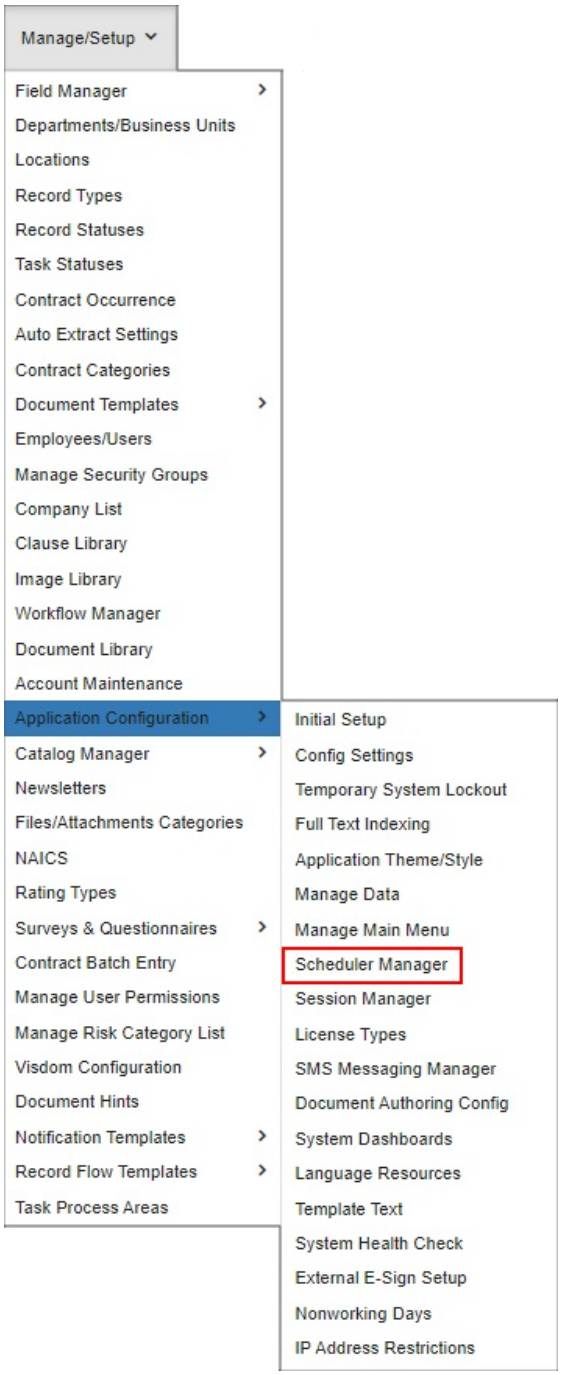
Manage Schedulers: Options

Contract Insight Enterprise Edition features a **Manage Schedulers** page under the **Application Configuration** menu. This page allows System Administrators to manage the E-mail Alerts (whether e-mails are being sent out), view the history for the E-mail Scheduler as a whole or by job individually, as well as select to run a job instantly.

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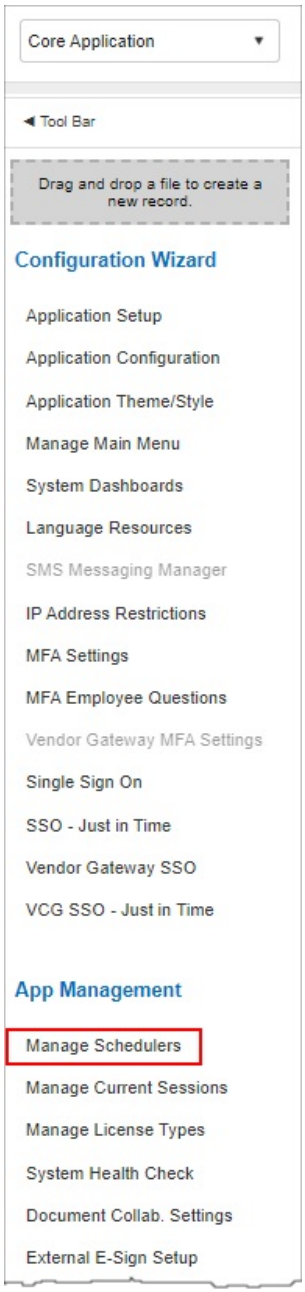
To Navigate to the Manage Schedulers screen:

Go to the **Manage/Setup** top navigation menu and select the **Application Configuration** > **Scheduler Manager**.



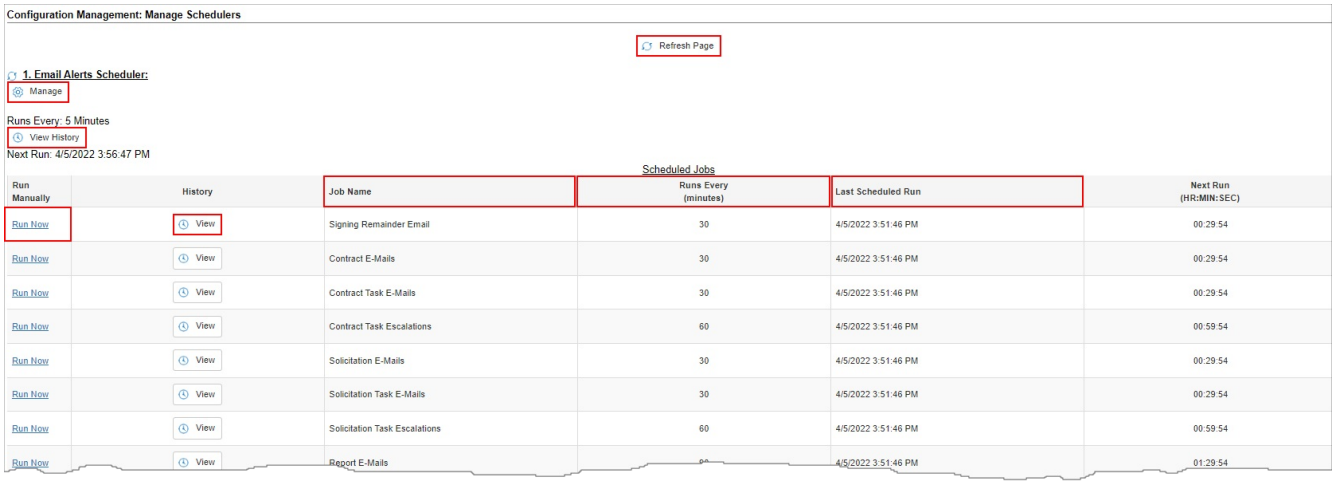
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You can also access the **Manage Schedulers** screen by clicking **Manage Schedulers** on the side menu of the Application Configuration screen under the **Configuration Management** section.



The Manage Schedulers Screen:

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Manage: Allows System Administrators to Enable/Disable e-mail alerts being sent from system as a whole. If scheduler is stopped, NO e-mail alerts will be sent from system.

View History: Allows Systems Administrators to view the Scheduler History for either the Scheduler as a whole ("View History" button) or for an individual job ("View" button for "History" column for an individual job). History will report when the job ran, for what area, and what the job ran.

Job Name: Name of job area for which e-mail alerts are running.

Runs Every (minutes): Setting for how often the e-mails for that job are being sent out. This setting can be managed by navigating to the job's "Scheduled Jobs" Application Configuration group.

Last Scheduled Run: Date and time that the job was last run (checking for and sending of e-mails).

Run Now: Allows System Administrator to have the job run immediately instead of waiting for next scheduled time to run (see the "Next Run" column).

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02. Schedule Manager

02. Schedule Manager

Schedule Manager: Settings

Contract Insight's scheduled jobs and e-mail alerts can all be configured using the **Application Configuration** screen by Administrative users with the proper permissions.

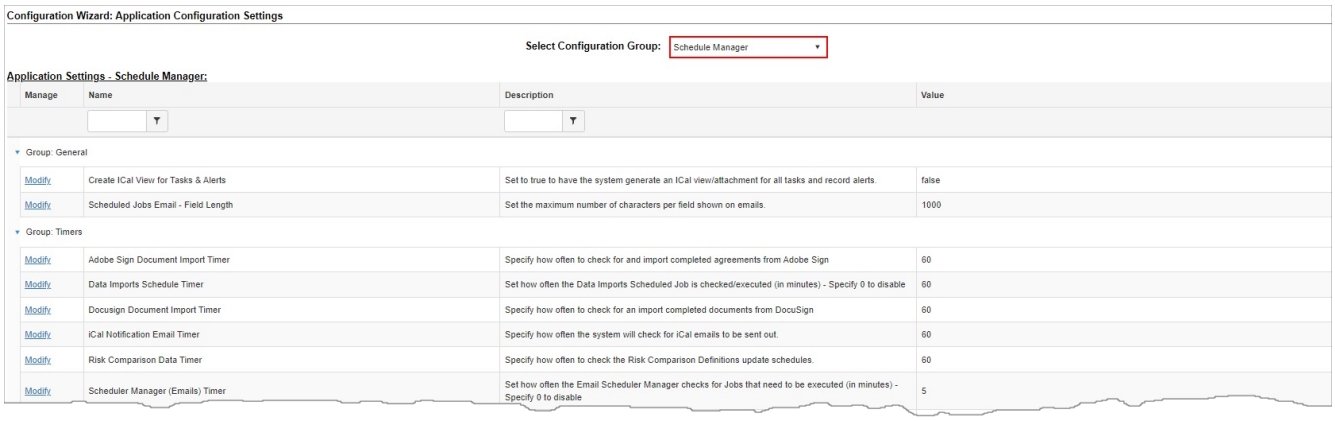
To access the **Application Configuration** settings:

1. In the **Manage/Setup** top navigation menu item, select the **Application Configuration** to display a sub-menu.

2. Click **Config Settings** to open the **Configuration Wizard: Application Configuration** screen.

Schedule Manager

1. Select **Schedule Manager** from the **Configuration Group** drop down menu.



The **Schedule Manager** configuration group allows for the following configuration settings to be modified (if needed):

a. **Schedule Jobs: Email- Field Length**- This sets the maximum number of characters per field shown on e-mails.

b. **Schedule Manager Log History Retention**- This sets the number of days to keep the log history for the Scheduler Manager (Specify '0' for unlimited).

c. **Scheduler Manager Timer**- This sets how often the Scheduler Manager timer will check each scheduled job to see if a scheduled job is ready to be sent out based on the scheduled job's timer setting in minutes (Specify '0' to disable).

d. **SQL Jobs: Schedule Timer**- This sets how often the SQL Job Schedule is checked/executed in minutes (Specify '0' to disable).

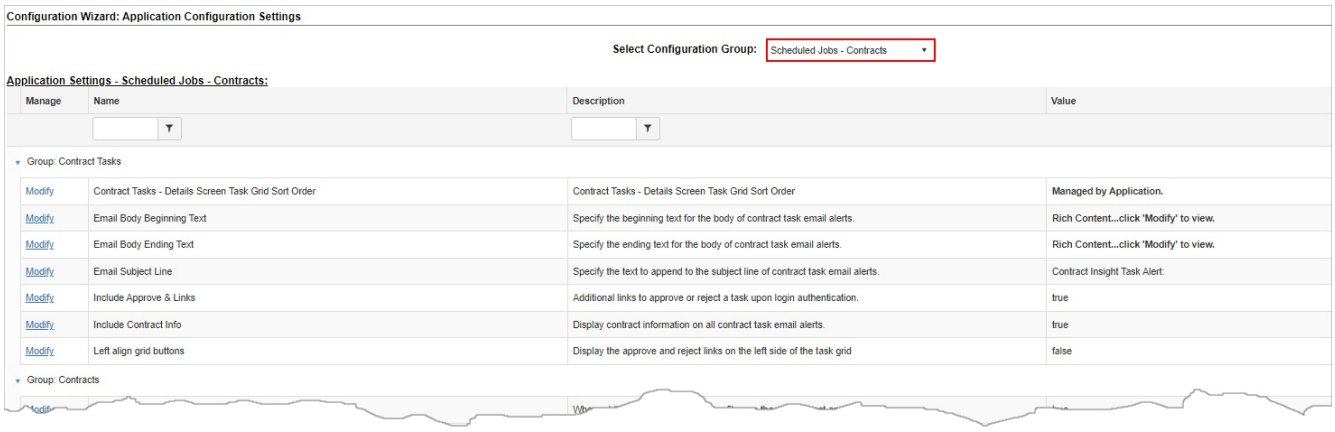
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03. Scheduled Jobs: Contracts

03. Scheduled Jobs: Contracts

Scheduled Jobs: Contracts

Select the **Scheduled Jobs- Contracts** configuration group from the drop down menu on the **Configuration Wizard: Application Configuration** screen.



Contract Tasks Group:

Email Body Beginning Text: Specify the beginning text for the body of contract task email alerts.

Email Body Ending Text: Specify the ending text for the body of contract task email alerts.

Email Subject Line: Specify the text to append to the subject line of contract task email alerts.

Include Contract Info: Set this option to **True** to display contract information on all contract task email alerts.

Contracts Group:

Auto Extract Contract Data: Configuration setting used when Adding Contract from File.

E-mail Address to notify when a Clause list item is changed: If an e-mail address is entered into this Application Setting's value, then the e-mail address will receive an alert if a Clause in the Clause Library is edited.

Email Body Beginning Text: Specify the beginning text for the body of contract email alerts.

Email Body Ending Text - Specify the ending text for the body of contract email alerts. (Default= "Please log in and review this alert.")

Email Subject Line - Specify the text to append to the subject line of contract email alerts. (Default= "Contract Alert:")

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General Group:

Display Link for Contracts & Tasks - Set this to **True** to display link to Contract/Contract Task record in email alerts.

Reply to Address for Contracts & Tasks - Specify the Email Address to be used as the Reply To on all scheduled Contract/Contract Task email alerts.

Timers Group:

Contract Task Email Timer - Set how often contract task email alerts are sent (in minutes)-specify “0” to disable. (Default= '30')

Contracts Email Timer - Set how often contract email alerts are sent (in minutes)- specify “0” to disable. (Default= '30')

Escalation Timer - Set how often escalations to contract tasks are checked (in minutes)-specify “0” to disable. (Default= '60')

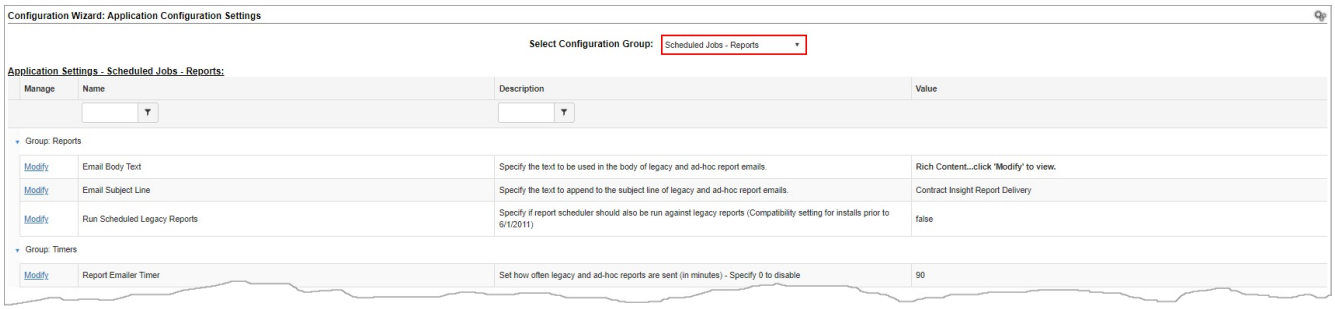
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04. Scheduled Jobs: Reports

04. Scheduled Jobs: Reports

Scheduled Jobs: Reports

Select the **Scheduled Jobs- Reports** configuration group from the drop down menu on the **Configuration Wizard: Application Configuration** screen.



Reports: Email Body Text- Specify the text to be used in the body of legacy and ad-hoc report emails. (Default= "Attached is your scheduled report from Contract Insight.")

Reports: Email Subject Line- Specify the text to append to the subject line of legacy and ad-hoc report emails. (Default= "Contract Insight Report Delivery")

Reports: Emailer Timer- Set how often legacy and ad-hoc reports are sent (in hours)- Specify “0” to disable. (Default= '120')

Reports: Run Scheduled Legacy Reports- Set this option to **True** to specify if report scheduler should also be run against legacy reports (Compatibility setting for installs prior to 6/1/2011).

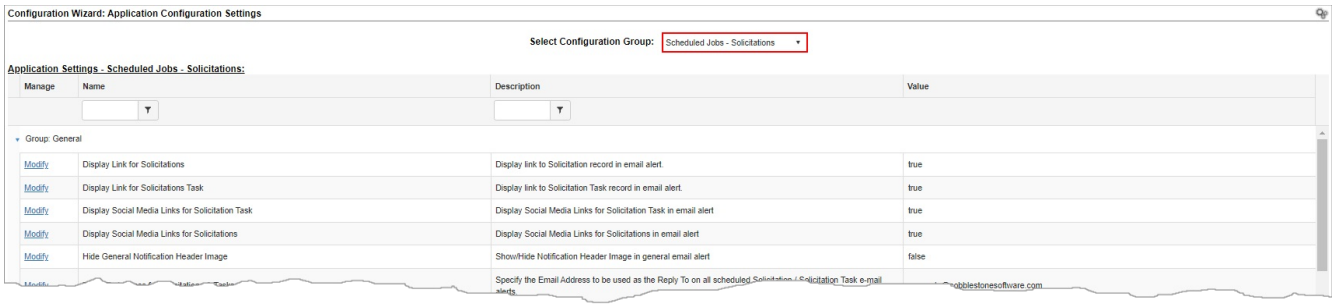
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05. Scheduled Jobs: Solicitations

05. Scheduled Jobs: Solicitations

Scheduled Jobs: Solicitations

Select the **Scheduled Jobs- Solicitations** configuration group from the drop down menu on the **Configuration Wizard: Application Configuration** screen.



General Group:

Solicitations & Tasks: Display Link- Set this option to **True** to display link to **Solicitation/Solicitation Task** record in email alert.

Solicitations & Tasks: Reply To Address- Specify the Email Address to be used as the **Reply To** on all scheduled Solicitation/Solicitation Task email alerts.

Solicitation Tasks Group:

Email Body Beginning Text- Specify the beginning text for the body of solicitation task email alerts. (Default= "The following task is expiring:")

Email Body Ending Text- Specify the ending text for the body of solicitation task email alerts. (Default= "Please log in and review this alert.")

Email Subject Line- Specify the text to append to the subject line of solicitation task email alerts. (Default= "Solicitation Task Alert:")

Include Solicitation Info- Set this option to **True** to display contract information on all solicitation task email alerts.

Solicitations Group:

Email Body Beginning Text- Specify the beginning text for the body of solicitation email alerts. (Default= "The following solicitation has an alert:")

Email Body Ending Text- Specify the ending text for the body of solicitation email alerts. (Default= "Please log in and review this alert.")

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Email Subject Line- Specify the text to append to the subject line of solicitation email alerts. (Default= "Solicitation Alert:")

Timers Group:

Solicitation Tasks Email Timer- Set how often solicitation task email alerts are sent (in minutes)-specify “0” to disable. (Default= '30')

Escalation Timer- Set how often escalations to solicitation tasks are checked (in minutes)- specify “0” to disable. (Default= '60')

Solicitations Email Timer- Set how often solicitation email alerts are sent (in minutes)- specify “0” to disable. (Default= '30')

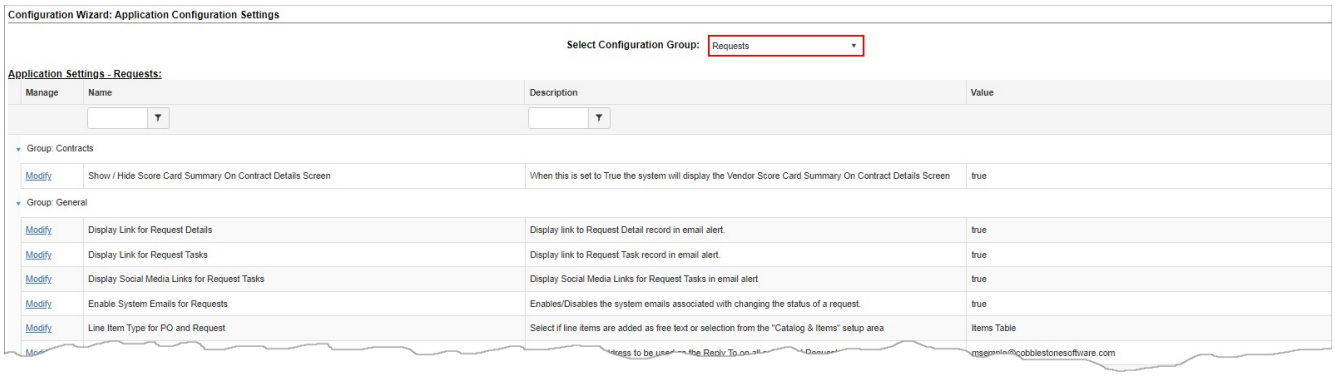
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06. Scheduled Jobs: Requests

06. Scheduled Jobs: Requests

Scheduled Jobs: Requests

On the **Configuration Wizard: Application Configuration Settings** screen, from the **Select Configuration Group** drop down, select the **Requests** configuration group.



Contracts Group:

Copy Contract Request files to Contract Record- Copy Contract Request files to Contract Record when a new Contract Record is created from a Contract Request.

Select Request Files when creating a Contract record- When creating a contract from a request, manually select which files will be copied from the request to the contract.

Show / Hide Score Card Summary on Contract Details Screen- When this is set to True the system will display the Vendor Score Card Summary on Contract Details Screen.

General Group:

Display Link for Request Tasks - Display link to Request Task record in email alert.

Enable System Emails for Requests - Enables/Disables the system emails associated with changing the status of a request.

Reply to Address for Request Tasks - Specify the Email Address to be used as the Reply To on all scheduled Request related Task e-mail alerts.

Show Budget/Spend Alerts on Request Details Screen - Displays Budget/Spend Alert warnings on top of Request Details Screen if PO Module is purchased: default is true to show the alerts.

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Tasks Group:

Email Body Beginning Text - Specify the beginning text for the body of Request related task email alerts. (Default= The following task is expiring:)

Email Body Ending Text - Specify the ending text for the body of Request task email alerts. (Default= Please log in and review this alert.)

Email Subject Line - Specify the text to append to the subject line of Request task email alerts. (Default= Request related Task Alert:)

Include Request Record Info - Display Request information on all Request related task email alerts.

Timers Group:

Request Tasks Email Timer - Set how often Request task email alerts are sent (in minutes) - Specify 0 to disable. (Default= 30)

Request Tasks Escalation Timer - Set how often escalations to Request tasks are checked (in minutes) - Specify 0 to disable. (Default= 60)

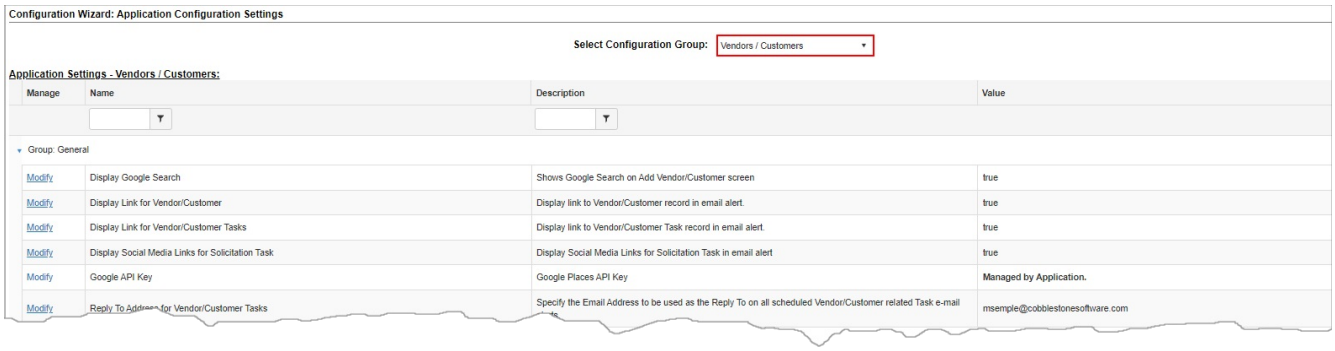
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07. Scheduled Jobs: Vendors & Customers

07. Scheduled Jobs - Vendors & Customers

Scheduled Jobs: Vendors/Customers

On the **Configuration Wizard: Application Configuration Settings** screen, from the **Select Configuration Group**, select **Vendors/Customers**.



General Group:

Display Link for Vendor/Customer Tasks - Display link to Vendor/Customer Task record in email alert.

Reply to Address for Vendor/Customer Tasks - Specify the Email Address to be used as the Reply To on all scheduled Vendor/Customer related Task e-mail alerts.

Tasks Group:

Email Body Beginning Text - Specify the beginning text for the body of Vendor/Customer task email alerts. (Default= The following task is expiring:)

Email Body Ending Text - Specify the ending text for the body of Vendor/Customer task email alerts. (Default= Please log in and review this alert.)

Email Subject Line - Specify the text to append to the subject line of Vendor/Customer task email alerts. (Default= Vendor/Customer Task Alert:)

Include Vendor/Customer Info - Display contract information on all Vendor/Customer task email alerts.

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Timers Group:

Vendor/Customer Tasks Email Timer - Set how often Vendor/Customer related task email alerts are sent (in minutes) - Specify 0 to disable. (Default= 30)

Vendor/Customer Tasks Escalation Timer - Set how often escalations to Vendor/Customer Order tasks are checked (in minutes) - Specify 0 to disable. (Default= 60).

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Bulk Import Data

Bulk Import Data

Account Maintenance: Bulk Data Import

Contract Insight Enterprise offers the ability to bulk import data from a structured CSV file. CSV files contain structured data and can be opened with standard spreadsheet programs such as MS Excel. Typically, the bulk importing of data must be performed by an application administrator.

Notes:

It is recommended records are imported via the **Data Import Manager Tool** rather than the **Bulk Data Import Manager** as this tool is outdated and considered **Legacy.**

It is **strongly** recommended to review the "Configuration Guidelines" available in the User Manual. Many of the system's data areas/tables are hierarchically related to other system data areas/tables.

For example, if data is bulk imported to the Employee List, the Department ID relating to the Employee's department (that is being imported) should be in the proper Department column of the CSV file and NOTE the text description of the Employee's Department. For these purposes, it is recommended that data imported into the system should be reviewed by a knowledgeable application administrator and follows a sequence specified in the "Configuration Guidelines" available in the User Manual. It is recommended to have an Application Administrator perform these imports.

In the CSV Template, Protected words (or words that will not) import through the Bulk Importer and should be excluded from being entered into the CSV template: **drop**, **delete**, **truncate**, **insert**, **update**, and **alter**. Any words that are or contain the above protected words should be entered into Contract Insight manually.

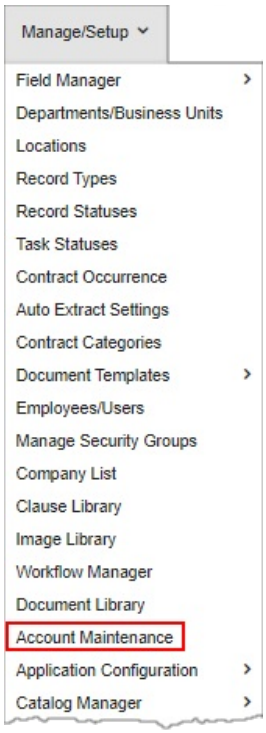
Important: The bulk importing of data will add only to the current specified table data list and will not update the existing items in the specified table data list. The bulk data import function will not replace duplicate/matching entries in the selected data area/table. If you upload/import a specific entry more than once, the selected data area/table will contain duplicate entries. If you enter duplicate entries in the .csv template file and then click **Process Data Upload**. The selected data area/table will contain duplicate entries.

To Bulk Import Data:

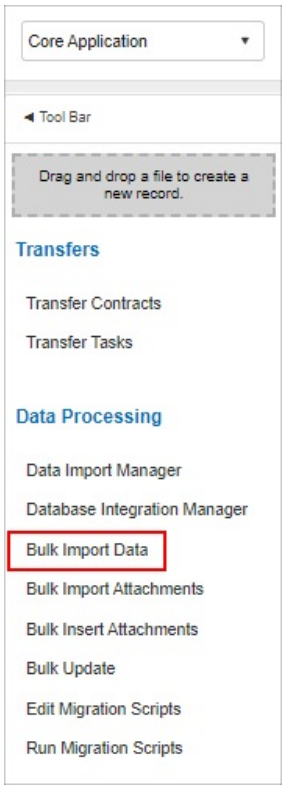
1. Log into the application as an application administrator user (Sys. Admin)

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2. Next, select **Account Maintenance** located under the **Manage/Setup** menu.



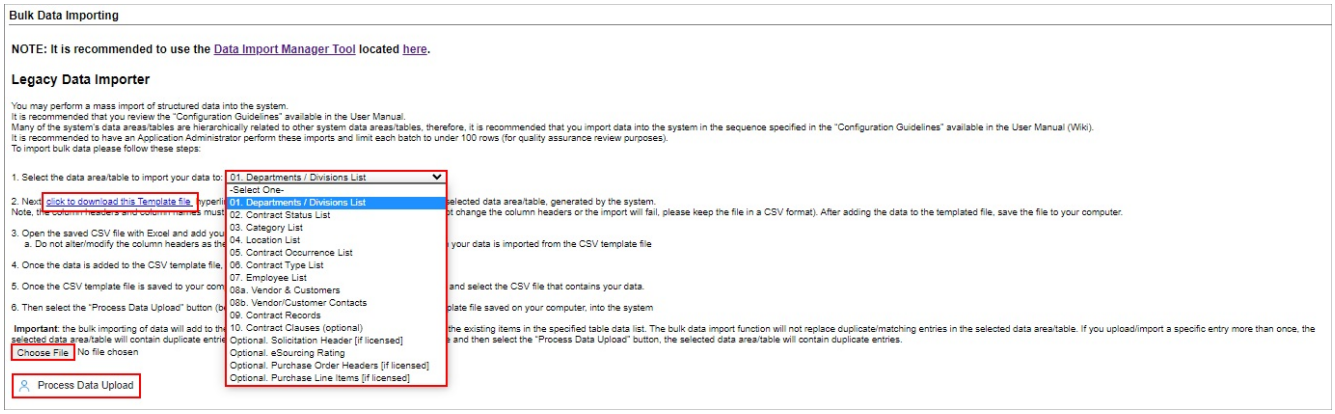
3. Click **Bulk Import Data**.



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4. The **Import Data** screen will then open.

5. Note the **Tips When Importing** box on the side menu, which will aid in avoiding unwanted errors when performing the upload.



5. Select the **data area/table** drop down menu, the table to which to Bulk Import.

6. Upon selecting a table, additional instructions will open that should be read and followed carefully; the following should be noted:

- Be sure to perform the Bulk Import in the order in which the tables are displayed numerically.
- A link to download the most current template to be used for the Bulk Import
- After reading all provided instructions and the template has been populated and saved as a .CSV file, click **Choose File** to search for and select the .CSV template.
- Click **Process Data Upload** to begin the Bulk Import.

To Download and Populate the CSV Template

Before populating the downloaded template, scroll to the bottom of the screen to view the composition of the associated template. Notice that the screen-shot below contains the names of the fields as well as their associated characteristics/attributes. This information will be extremely useful for the purpose of understanding what kind of data is expected in each of the fields/columns.

Sample field layout is below:

First Name	Last Name	Title	Department	Email	Address	City	State	Zip	Manager	Home_ Phone	Office_ Phone	Office_ Fax	User Name	Password	License Type	Comments
No records to display.																

Sample data type layout is below:

ColumnName	DataType	MaxLength
FirstName	varchar	255
LastName	varchar	255
Title	varchar	255
Department	int	
Manager	int	
Comments	varchar	1000
UserName	varchar	100
Password	varchar	100
Email	varchar	500
City	varchar	255
State	varchar	255
Zip	varchar	255
Address	varchar	255
Office_Phone	varchar	20
Home_Phone	varchar	20
Office_Fax	varchar	20
LicenseType	varchar	100

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1. Click **click to download this Template file** to download the selected template file and save it as a .CSV file to a location on your computer (remember this location).

Notes:

Do not alter/modify the column headers as the system will require the correct column headers when your data is imported from the .CSV template file.

Keep the file in a .CSV format to ensure the import will execute successfully.

2. Locate and open the saved CSV file with Microsoft Excel (or equivalent) and add your data to each row needed.

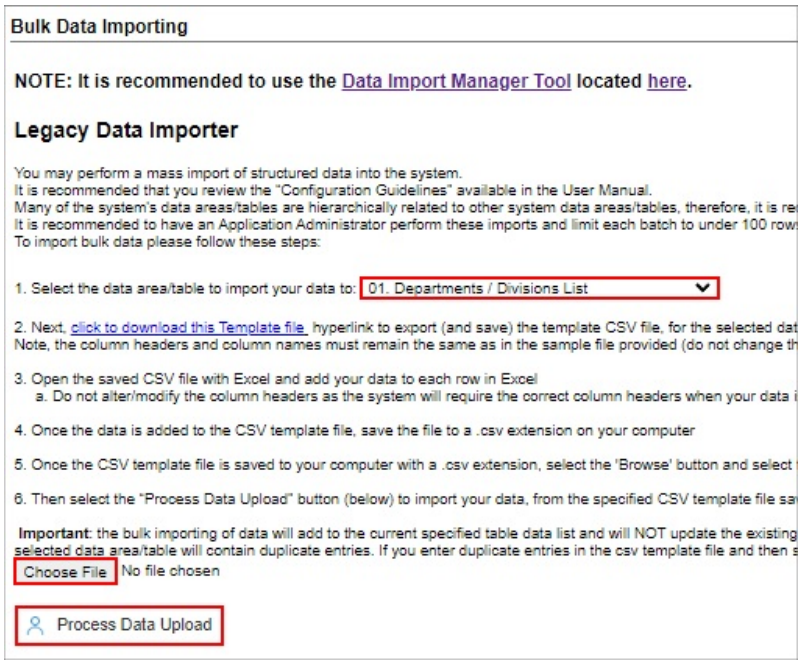
	A	B	C	D	E	F	G	H	I	J	K	
1	First Name	Last Name	Title	Department	Email	Address	City	State	Zip	Manager	Home_Phone	Off
2	Hover	Herbert11	VP of Legal 1	225	info@cobblestonesystems.com	West lane 1	Coty of america 1	State 1	10001-3332		555-555-5555	444
3	Twain	Mark11	VP of Legal 2	244	info@cobblestonesystems.com	west lane 2	Coty of america 2	state 2	10001-3333		555-555-5556	444
4	Lincoln	Abraham1	VP of Legal 3	205	info@cobblestonesystems.com	West lane 3	Coty of america 3	State 3	10001-3334		555-555-5557	444
5	Ceasar	Julius1	VP of Legal 4	6	sales@cobblestonesystems.com	West lane 4	Coty of america 4	State 4	10001-3335		555-555-5558	444
6	Earhart	Amelia1	VP of Legal 5	9	info@cobblestonesystems.com	West lane 5	Coty of america 5	State 5	10001-3336		555-555-5559	444
7	Barton	Clara1	VP of Legal 6	245	mnastasi@cobblestonesystems.com	West lane 6	Coty of america 6	State 6	10001-3337		555-555-5560	444
8	Columbus	Christopher1	VP of Legal 7	251	info@cobblestonesystems.com	West lane 7	Coty of america 7	State 7	10001-3338		555-555-5561	444
9	Ross	Betsy1	VP of Legal 8	202	info@cobblestonesystems.com	West lane 8	Coty of america 8	State 8	10001-3339		555-555-5562	444
10	Franklin	Benjamin1	VP of Legal 9	7	info@cobblestonesystems.com	West lane 9	Coty of america 9	State 9	10001-3340		555-555-5563	444
11	Sigman	Freud1	VP of Legal 10	16	info@cobblestonesystems.com	West lane 10	Coty of america 10	State 10	10001-3341		555-555-5564	444
12	Einstein	Albert1	VP of Legal 11	252	info@cobblestonesystems.com	West lane 11	Coty of america 11	State 11	10001-3342		555-555-5565	444
13	Smith	Adam1	VP of Legal 12	7	info@cobblestonesystems.com	West lane 12	Coty of america 12	State 12	10001-3343		555-555-5566	444
14	Dwight	Eisenhower1	VP of Legal 13	16	info@cobblestonesystems.com	West lane 13	Coty of america 13	State 13	10001-3344		555-555-5567	444
15	Jefferson	Thomas1	VP of Legal 14	252	info@cobblestonesystems.com	West lane 14	Coty of america 14	State 14	10001-3345		555-555-5568	444
16	Gandi	Mahatma1	VP of Legal 15	7	info@cobblestonesystems.com	West lane 15	Coty of america 15	State 15	10001-3346		555-555-5569	444
17	Bach	Johann Sebastian1	VP of Legal 16	16	sales@cobblestonesystems.com	West lane 16	Coty of america 16	State 16	10001-3347		555-555-5570	444
18	Churchill	Winston1	VP of Legal 17	252	info@cobblestonesystems.com	West lane 17	Coty of america 17	State 17	10001-3348		555-555-5571	444
19	Madison	James1	VP of Legal 18		info@cobblestonesystems.com	West lane 18	Coty of america 18	State 18	10001-3349		555-555-5572	444
20	Roosevelt	Theodore1	VP of Legal 19		info@cobblestonesystems.com	West lane 19	Coty of america 19	State 19	10001-3350		555-555-5573	444
21	Adams	John1	VP of Legal 20		accounting@cobblestonesystems.com	West lane 20	Coty of america 20	State 20	10001-3351		555-555-5574	444
22	Cleveland	Grover1	VP of Legal 21		info@cobblestonesystems.com	West lane 21	Coty of america 21	State 21	10001-3352		555-555-5575	444

Note: The Department Column denotes the Department ID field if it's DataType is INT (integer), not the text name of the department.

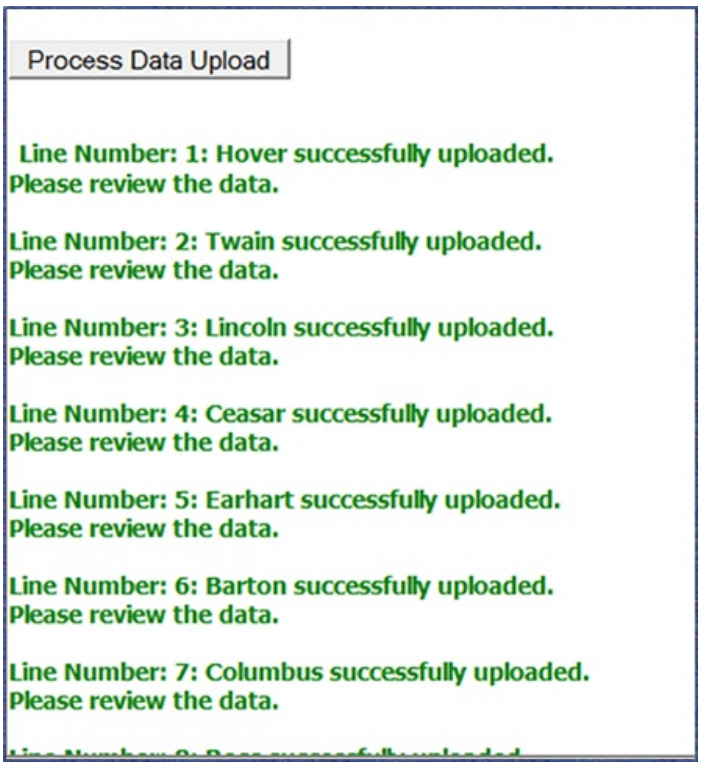
3. Once the data is populated into the CSV template file, save the file to your local computer (remember this file location).

4. Once the CSV template file is saved locally, click **Browse** on the Bulk Importer screen and select the CSV file that contains the data. Click **Process Data Upload** to import the data from the specified, locally-saved CSV template into the application.

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5. Once the correct CSV is uploaded and processed via **Process Data Upload**, the results of each row imported will appear below the **Process Data Upload** button. Successfully imported rows will be in green; rows that failed to import will be red.



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Custom SubTables

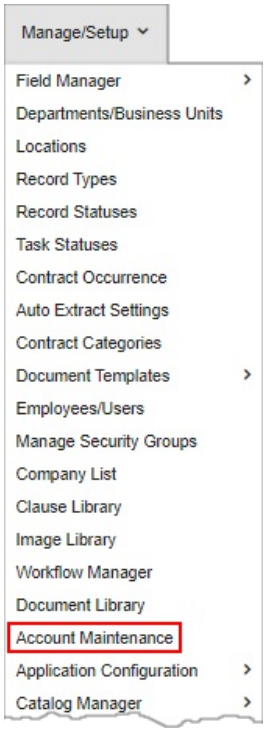
Custom Sub-Tables

Account Maintenance: Custom Subgrids/Subtables

Contract Insight Enterprise enables application administrators the ability to add custom **SubTables** to numerous tables and record types within Contract Insight. This enables users to add and track SubTable items in a column and row format. For example, let's imagine that your organization tracks contracts for Construction Contractors. For each Construction Contract record, your organization requires a contract record with a SubTable for the Insurance Coverage related to the contract. By adding a custom SubTable, the system can both track the contract and track the related items (in this case, insurance coverage) to the contract.

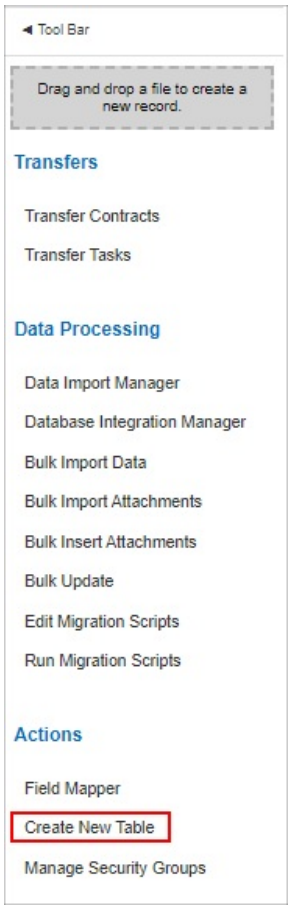
Add a Custom SubTable:To add (define) a **SubTable** (or new grid on a contract screen), log in as an Application Administrator.

Select **Account Maintenance** from the **Manage/Setup** menu.

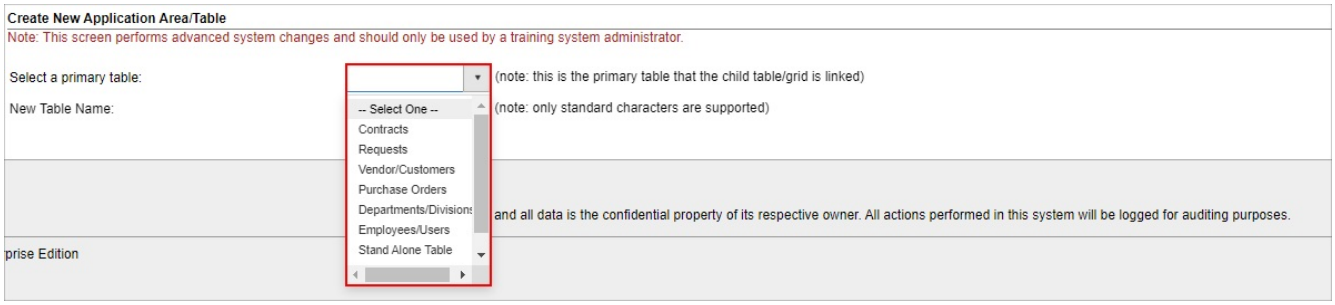


Select **Create New Table** on the side menu

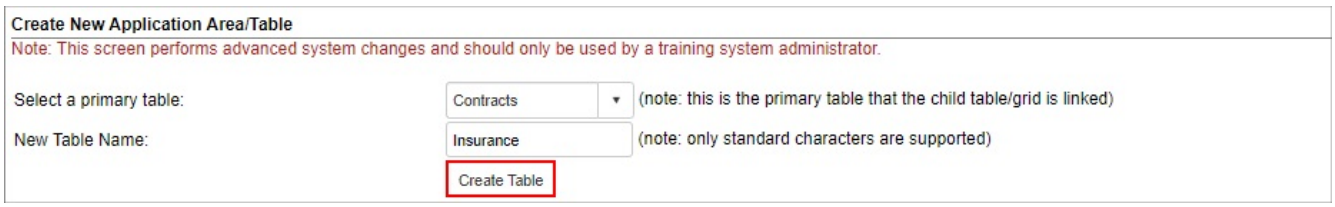
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The **Create New Table** screen displays. **Select the primary table** from the drop down box seen below (this associates/links the new **SubTable** to the table selected).



Next, enter the new **SubTable** name and select **Create Table**.



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Once the **SubTable** is created, the system will display a message indicating Table has been created.

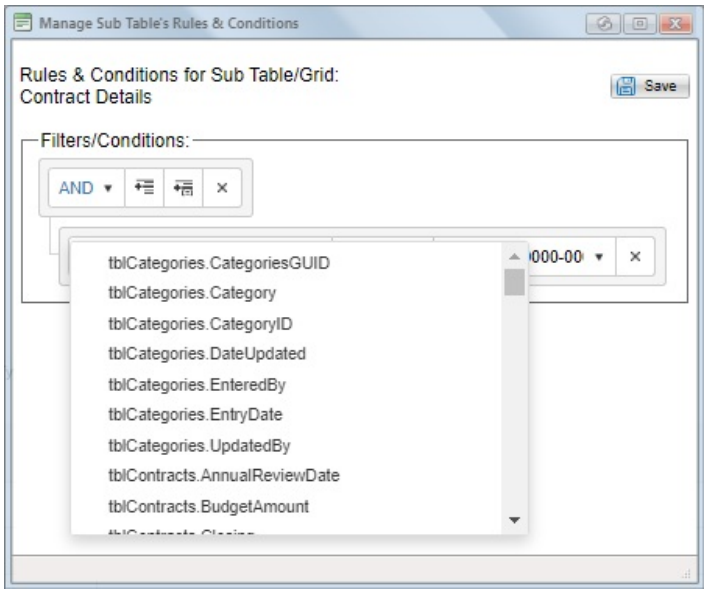
To learn how to add fields to your new **SubTable**, see the Create and Manage Custom Fields Wiki page.

Setting Rules

Rules/Conditions can be set for sub-tables so they only appear when relevant.

Click **Set Conditions**.

A pop-up window for condition expressions displays.



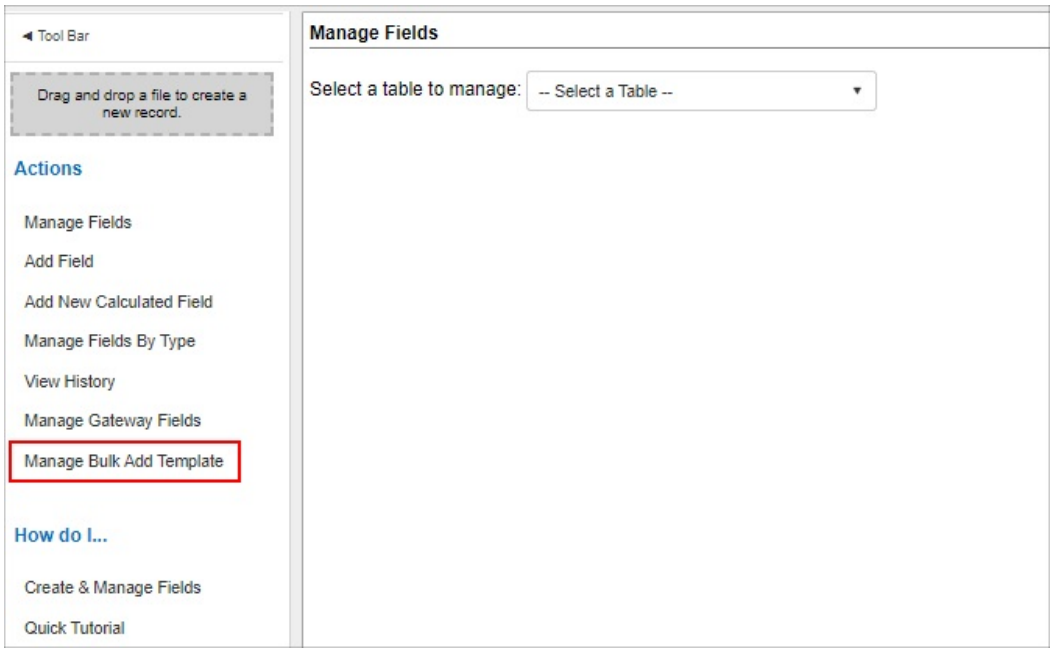
Using the **arrow** at the bottom of the field list, find the table and field around which to construct the condition(s).

Adding Bulk Records to Sub Tables

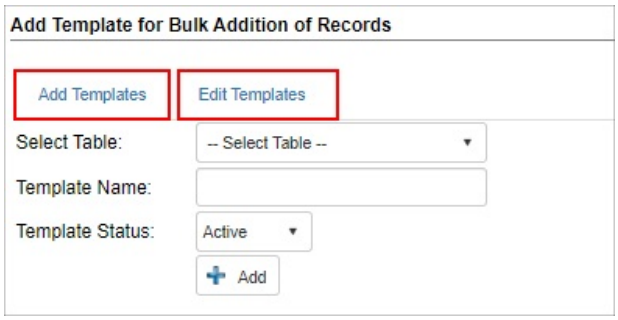
Adding template for sub tables - is a feature which allows users to create base template for sub table records and then use that template to add records for that particular sub table.

In the **Field Manager** a new side menu added as **Manage Bulk Add Template**.

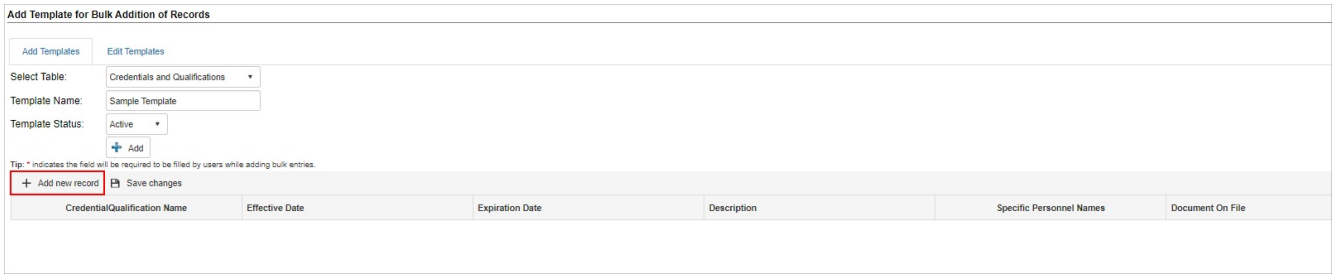
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After clicking on the above link following screen displays. This screen has two functionalities, Add Template and Edit Template.

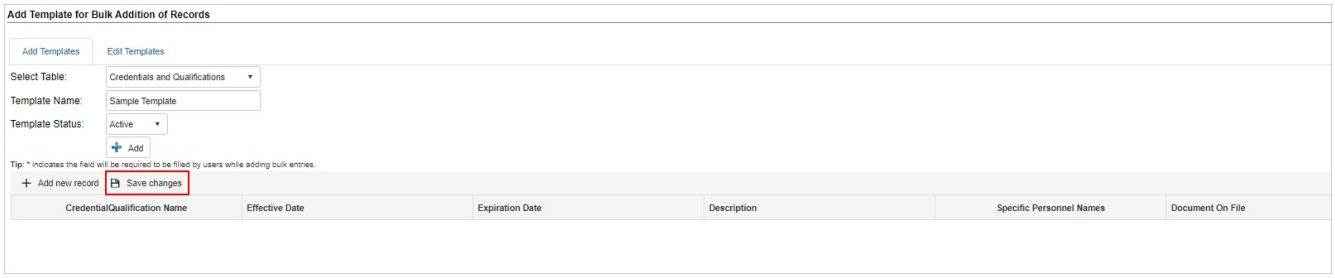


While adding new template first select sub table area from the drop down. Then add template name, select template status, by default it is Active. Click **Add Button**. This will
show all the fields from that table in a grid.



To add new record, click on Add new record button. It will add a new row to grid, where user can fill all the information. Like wise user can add multiple rows to template and once done click on Save changes button. The template will get saved.

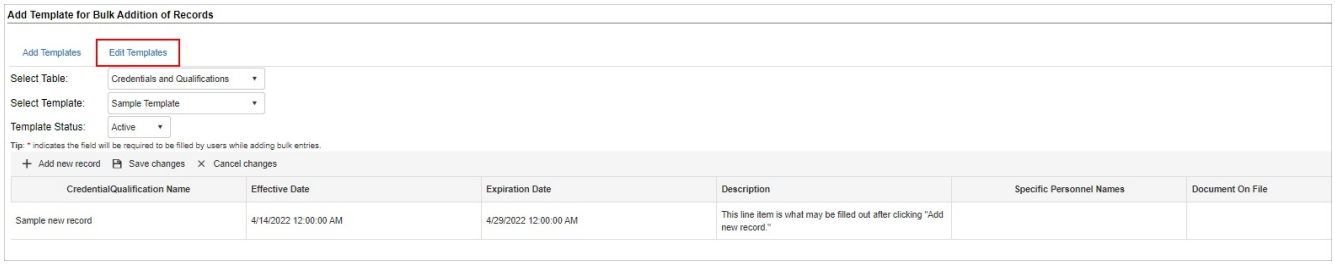
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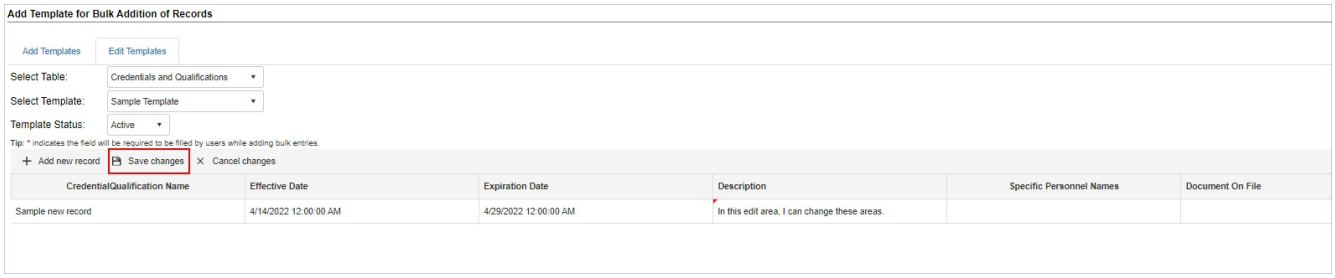
User can edit the template by clicking on Edit Template tab.

First the user must select the table, then available templates will be shown in below drop down.

Once the user selects the template which he wants to edit, the grid will be shown with records.



Here a user can modify existing records by clicking on the grid cell. User can add new records to the to the template, delete any record and can change the status of the template. And then by clicking on Save changes button, all changes will get saved.



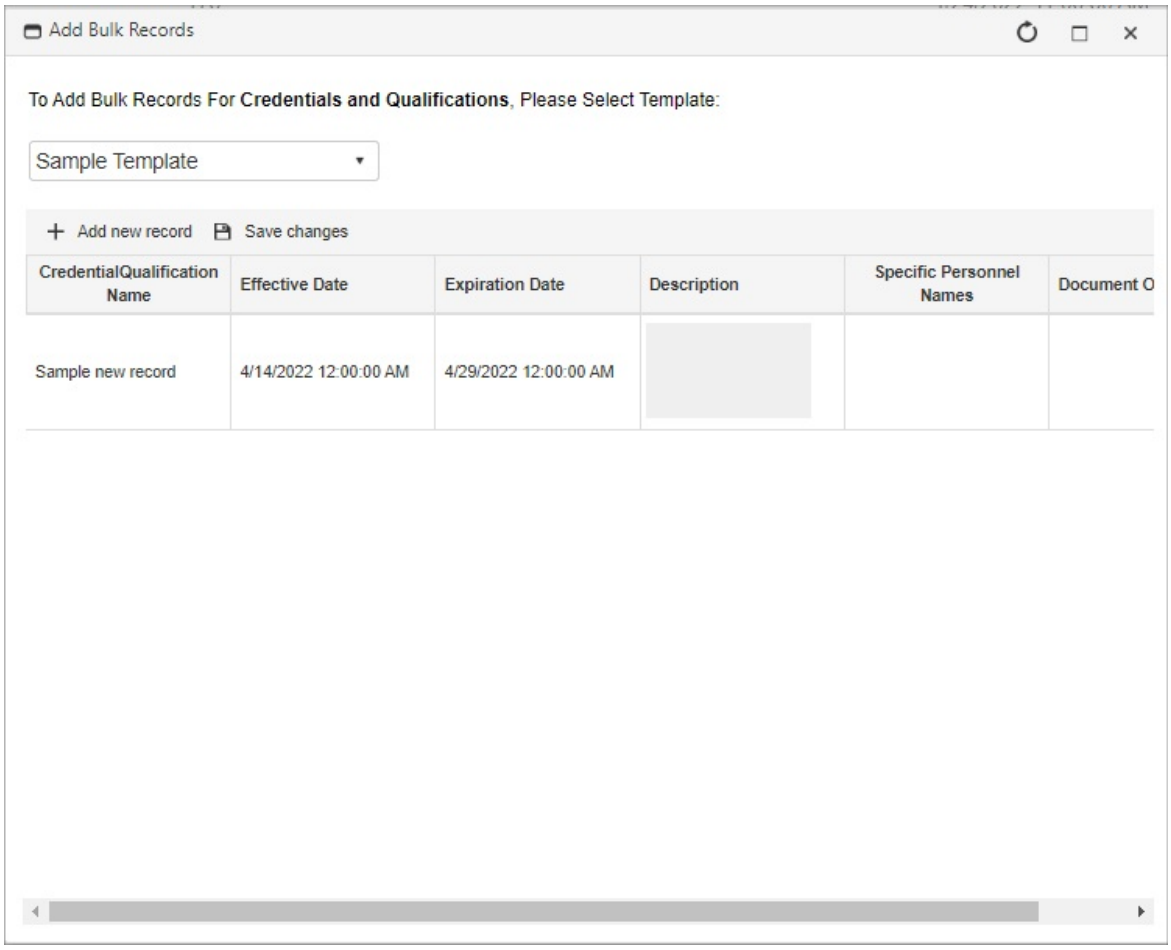
Using template to add records to sub tables –

If for sub table any template is available, then for that sub table Add Bulk button will be displayed. On clicking on Bulk Add button a pop-up window will open, where user can select the available template and can add those records to sub table.

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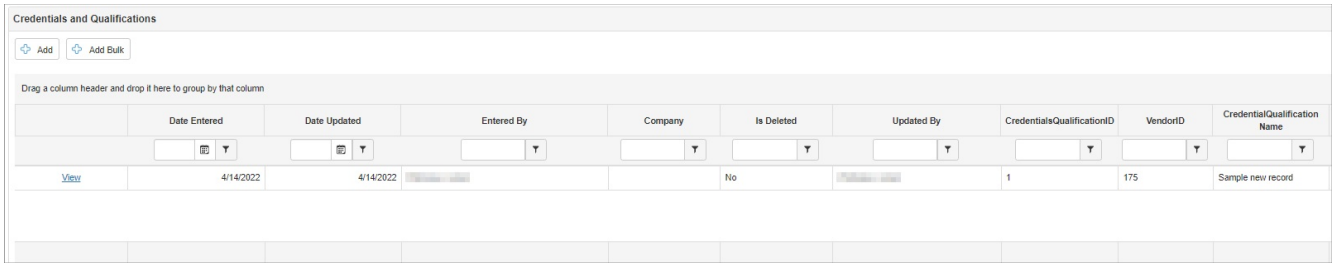


Pop-up window:



User can add, edit records and save the all the records to the sub tables.

Once records get added to sub table it will show in the grid.



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Field Mapper

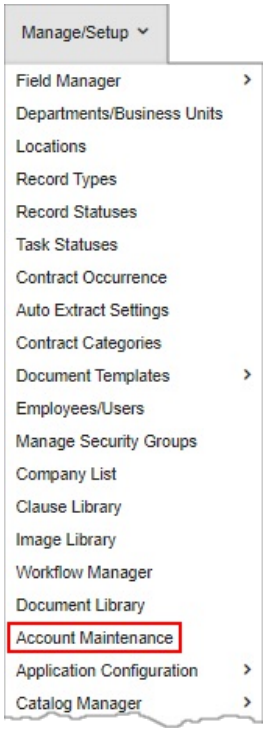
Field Mapper

Account Maintenance: Field Mapping Utility

Contract Insight Enterprise Edition provides organizations with the ability to create Contracts based upon data/information supplied in the Solicitation Details or Contract Request screens, with a single hyperlink/button click. This is made possible by the Field Mapper function. Field Mapper literally maps Solicitation Details Fields or Contract Request Fields to Contract Details Fields. This mapping provides the basis for auto-populating Contract Details Fields directly from pre-determined Solicitation Details Fields or Contract Request Fields.

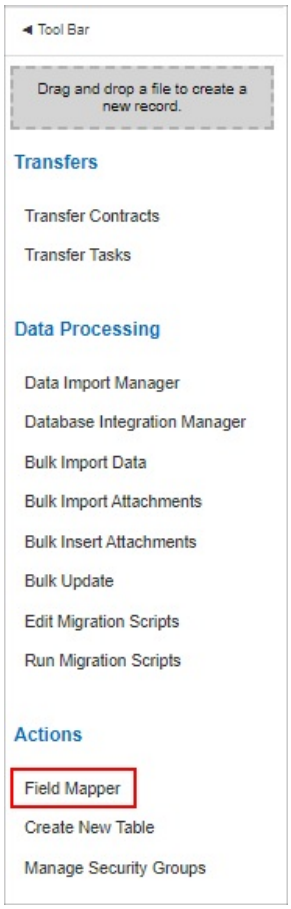
To access the Field Mapper:

Navigate to the **Manage/Setup** top navigation menu item and select **Account Maintenance**.



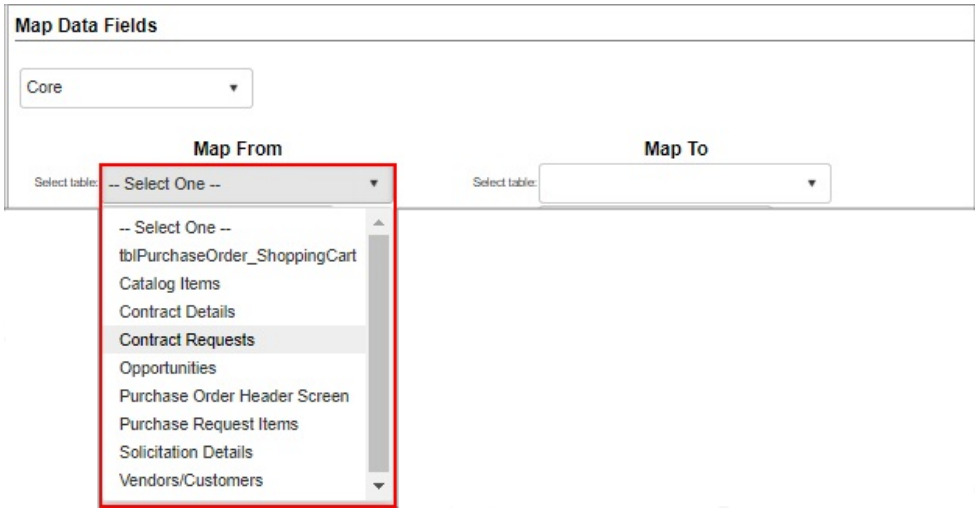
This will open the **Maintenance** screen. On the side menu, click **Field Mapper**.

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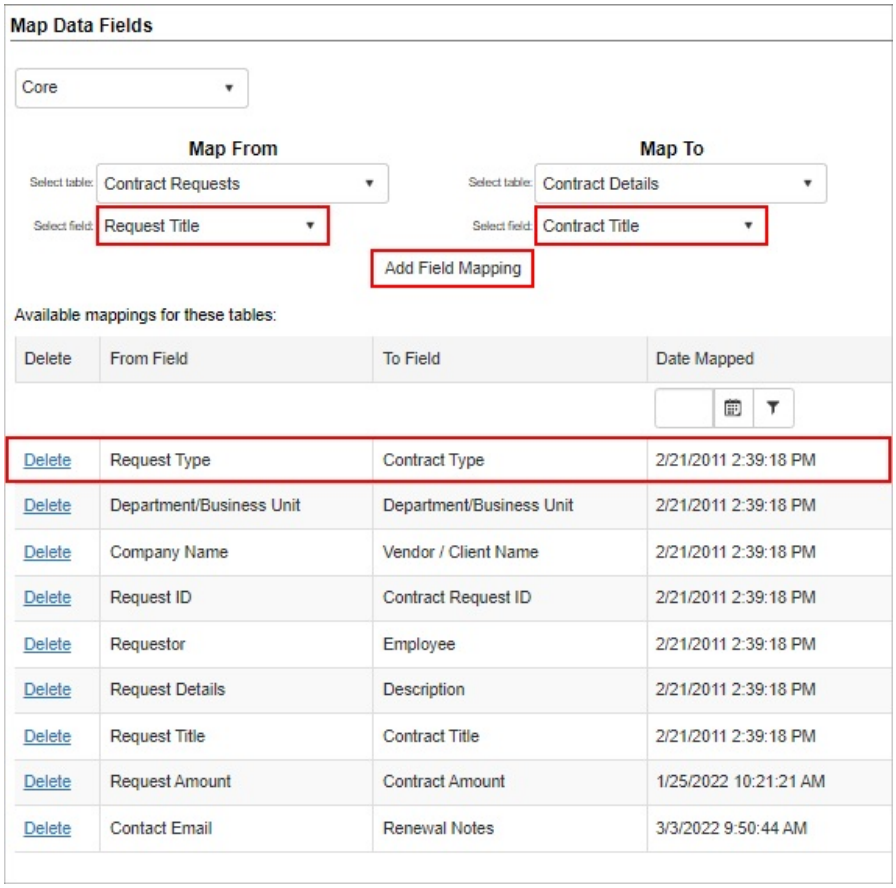


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The **Field Mapper** specifies the mapping of each table table field to the desired table and field.

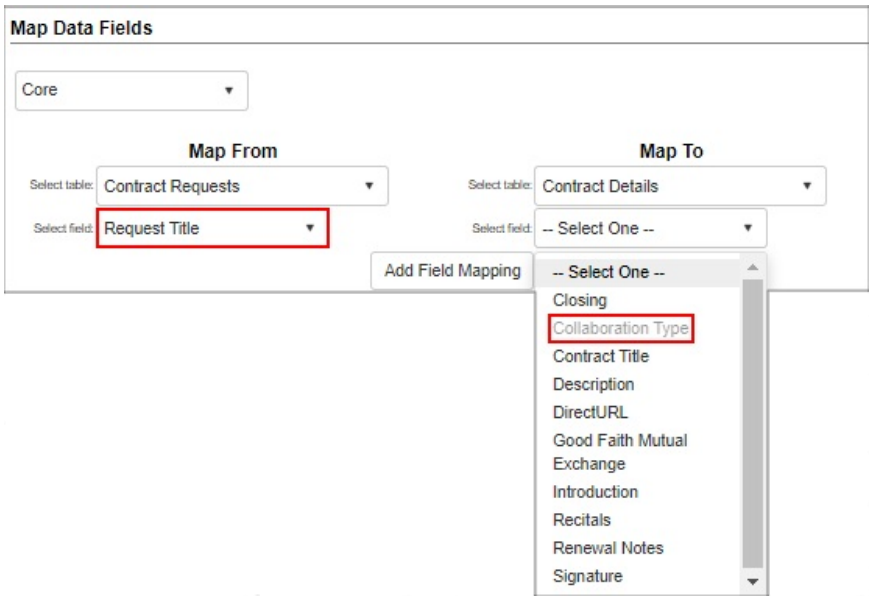


Click **Add Field Mapping**.



Note: If the fields' data types do not match (i.e. if you try to map a **Date** field to an **Integer** field), the incompatible fields will be greyed out.

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If this should occur, change either the field you are mapping from or to so the data types match.

Deleting mapped fields is accomplished by clicking **Delete** of the mapped field that you wish to remove.

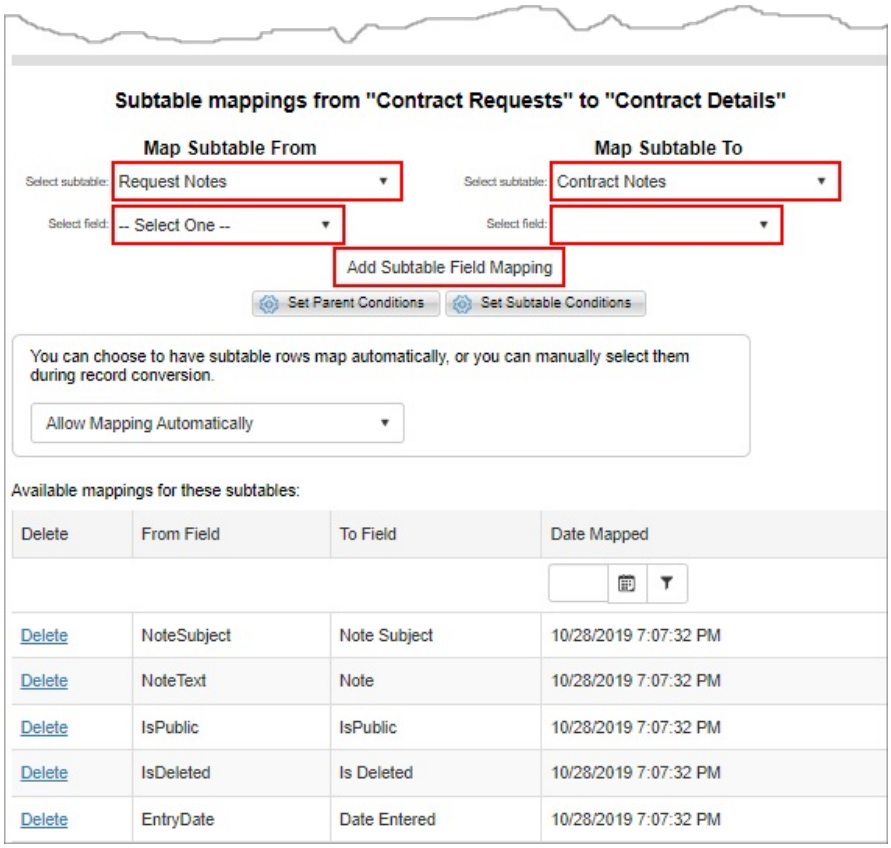
Note: it is recommended that to avoid mapping any field more than once. Failure to adhere to this recommendation will result in errors, inconsistent results, and failure of the Copy function on the Solicitation Details or Contract Request Details Screen.

Map Sub-Tables:

Values in sub-tables can also be mapped from one record to a new record.

1. After selecting the primary tables, scroll down the page to sub-table mapping.

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2. Select the sub-tables of origin and destination.

3. Select the fields to map from origin and to destination.

4. Click **Add Sub-Table Mapping**.

Note: Some out-of-the-box sub-tables may already have some fields defined for mapping.

To Indicate File Mapping:

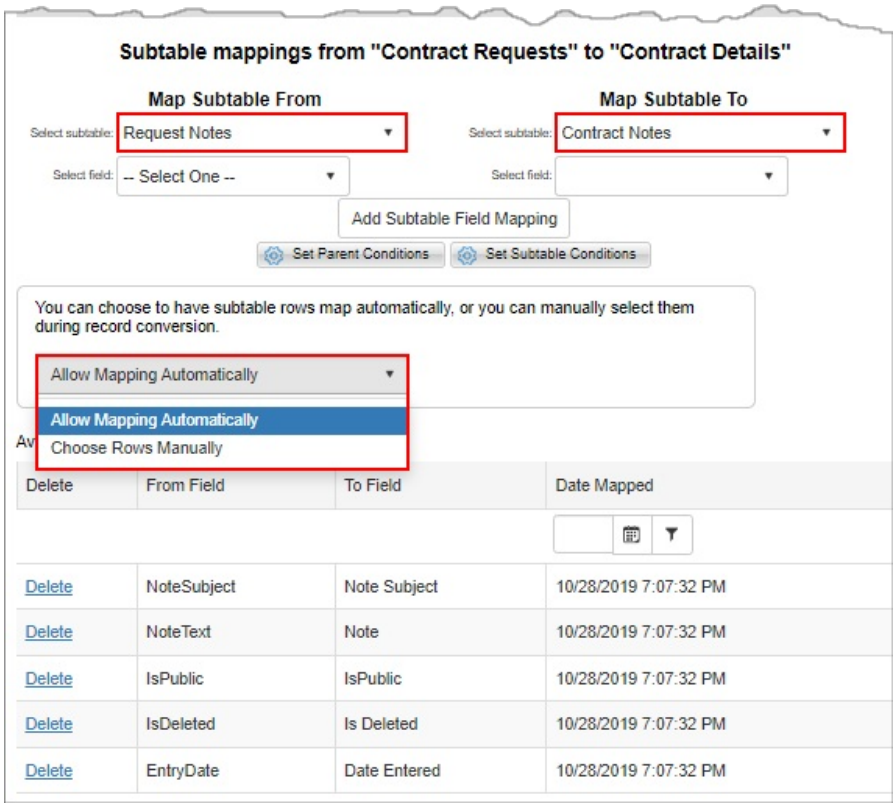
Files can be moved from one record to another via the field mapper.

1. After selecting the primary tables, scroll down the page to sub-table mapping.

2. Select the table of origin for the files.

3. Select the table of destination for the files.

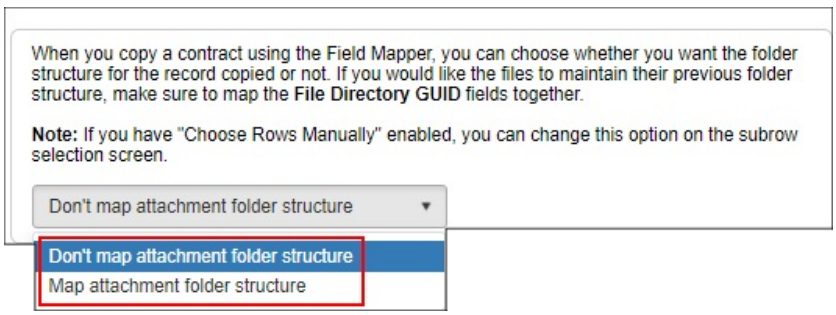
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4. Select Use Field Mapping to map all files to the new record. Alternatively, select Choose Files Manually to select the files during the process.

Mapping Folder Structure

When mapping Files/Attachments sub-table fields in the Field Mapper, System Administrators see a new option for mapping the attachment folder structure. If configured, users may copy the Files/Attachment folder structure when copying a record in CobbleStone. This will maintain the folder structure between copied records, so they do not need to be recreated each time.



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Bulk Import: Contract Attachments

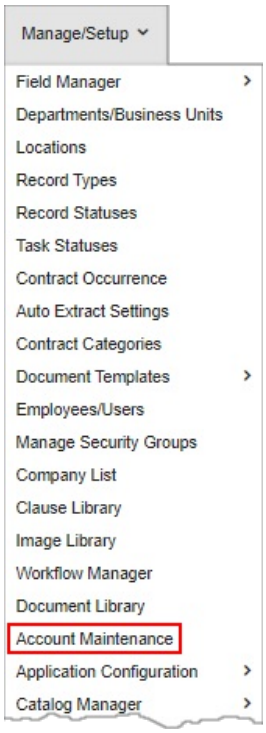
Bulk Import: Contract Attachments

Account Maintenance: Bulk Import Contract Attachments

The **Bulk Import Contract Attachments** function of Contract Insight enables a user to bulk upload and assign attachments to contract records. This enables a quicker method of importing data versus manually adding the attachments to each contract record individually. Also, this displays files that are still in the system but have the contract header record deleted.

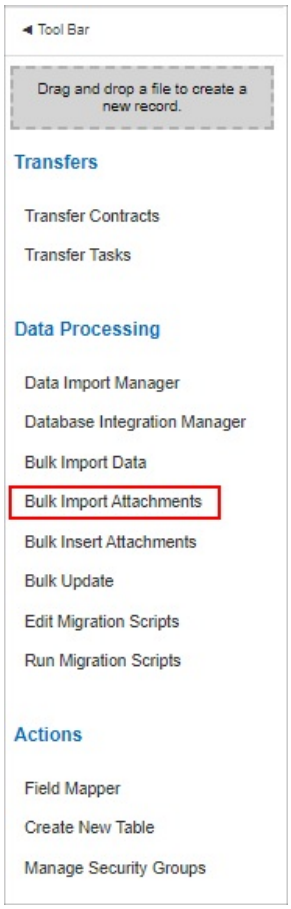
Importing attachments:

1. Click **Account Maintenance** under the **Manage/Setup** top navigation menu item.



2. The **Maintenance** screen displays. Click **Bulk Import Contract Attachments** on the side menu.

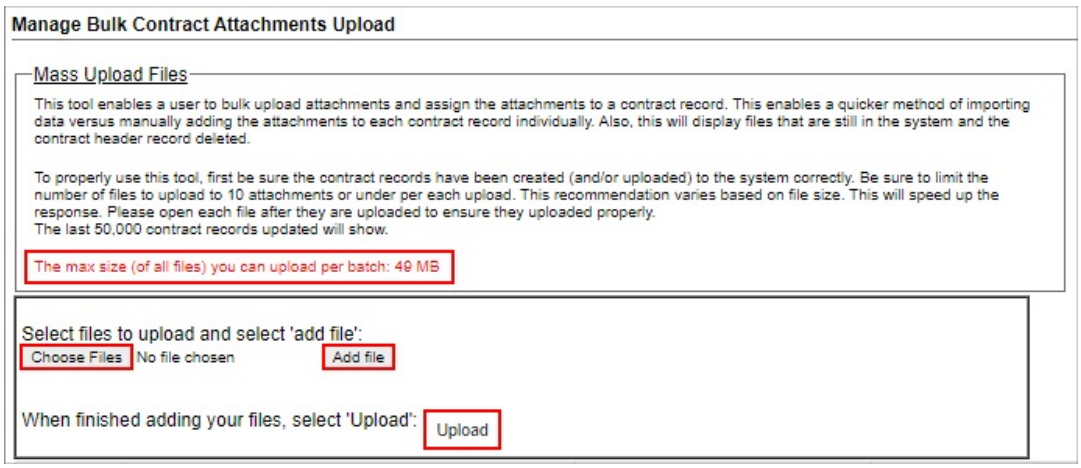
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3. Before uploading contract attachments, make sure the contract records have been created (and/or uploaded) to the system correctly.

4. The **Manage Bulk Attachments Upload** screen opens.

5. To select contract files to upload, click **Browse** and select the file you would like to attach.



6. To add more than one file, click **Add File** to display another text-box. Click **Browse**.

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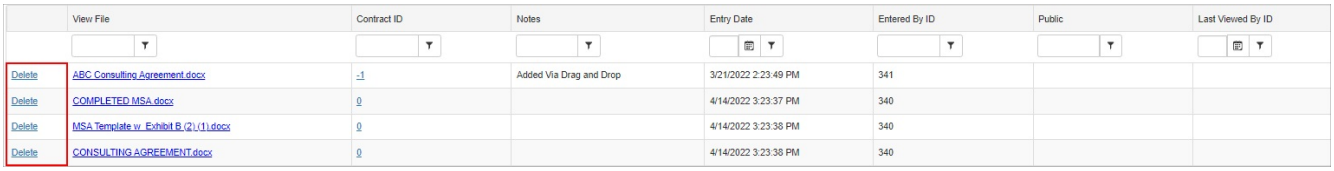
7. Be sure to limit the number of files to upload to ten (10) attachments or under per upload. The max size of all files you can upload per batch is 25 MB.

8. Once the maximum number of files or MB is reached, click **Upload**.

9. The uploaded files will show in the table below the uploads box.

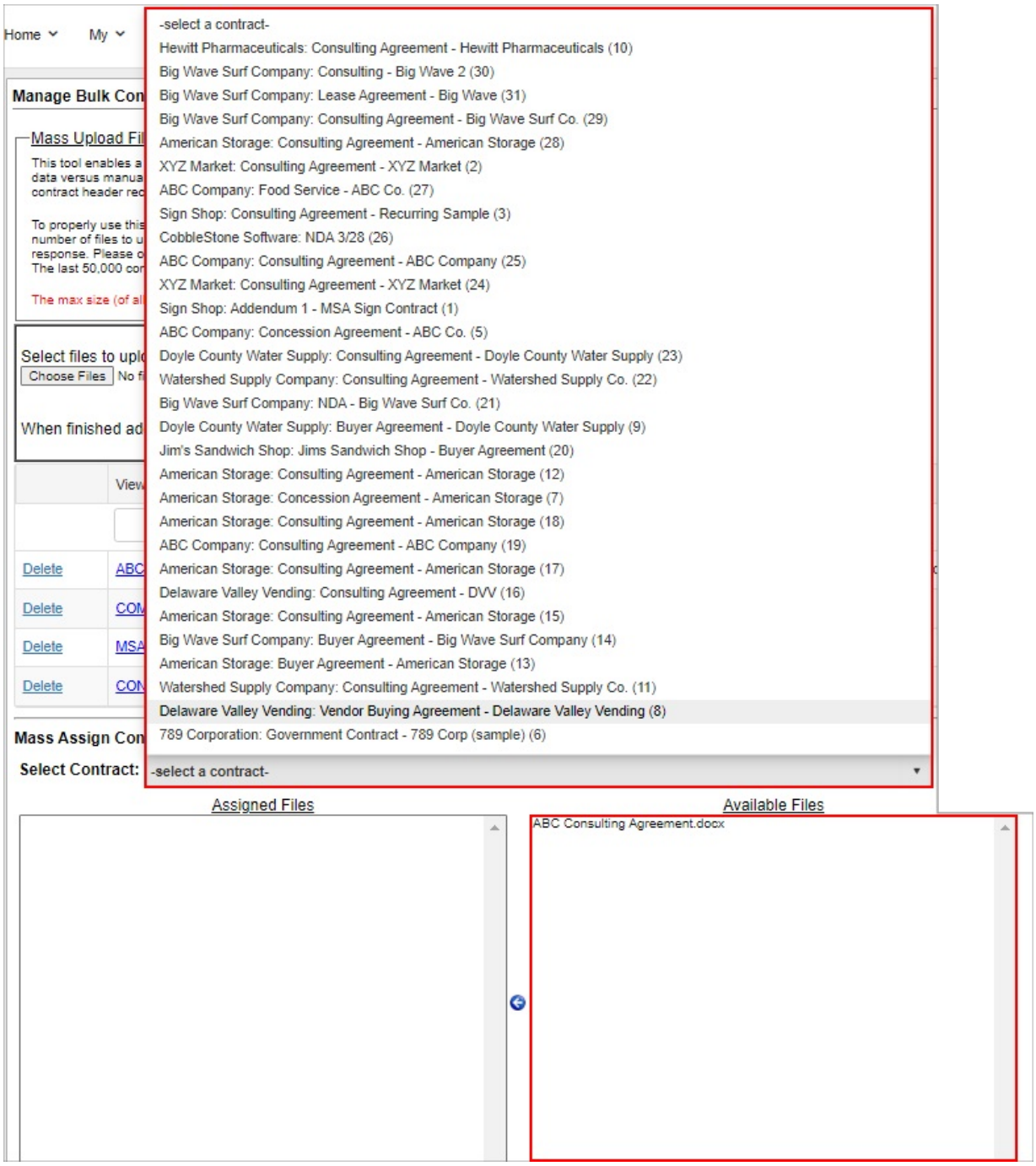
a. View the uploaded attachments by clicking the file name in the uploads box.

b. Remove a file using the **Delete** for the line item.



	View File	Contract ID	Notes	Entry Date	Entered By ID	Public	Last Viewed By ID
Delete	ABC Consulting Agreement.docx	-1	Added Via Drag and Drop	3/21/2022 2:23:49 PM	341		
Delete	COMPLETED MSA.docx	0		4/14/2022 3:23:37 PM	340		
Delete	MSA Template w_Exhibit B (2)(1).docx	0		4/14/2022 3:23:38 PM	340		
Delete	CONSULTING AGREEMENT.docx	0		4/14/2022 3:23:38 PM	340		

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10. Below the uploads box, note the **Mass Assign Contract Files** section.

11. Select the contract record to which you would like to upload files.

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12. Upon selecting a contract record from the drop down menu, a list of attached documents that are already attached to the contract record will be displayed.

13. From the **Unassigned Contract Files** box, Select the file(s) you would like to mass assign to the selected contract record. You can multi-select the file names by pressing **CTRL+Select**.

14. Once you have selected all contract files you would like to mass assign to the selected contract record, click the **Blue arrow** to complete the mass assign.

15. Repeat the previous steps for each contract record and each batch of contract files uploaded.

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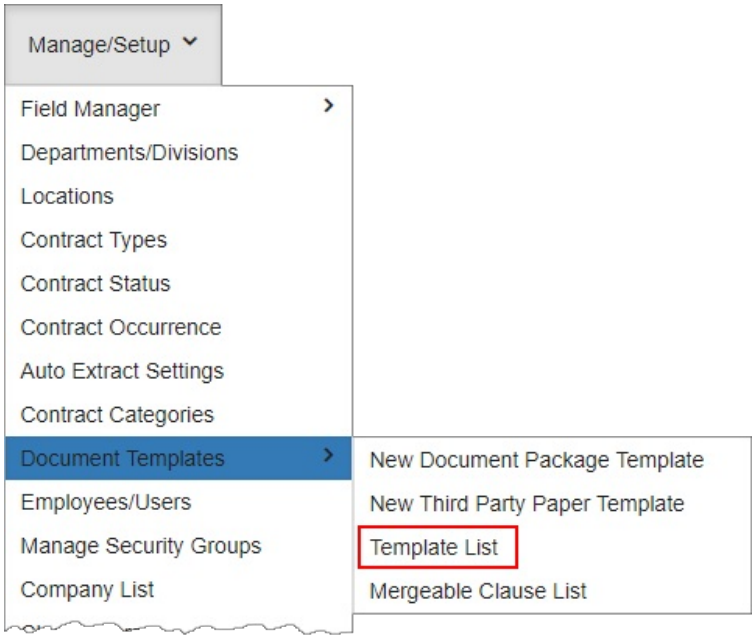
Manage Global Header and Footer

Manage Global Header & Footer

Setting Up and Managing the Global Header & Footer

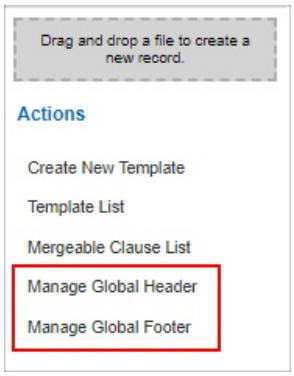
Contract Insight allows system administrators and users with the appropriate permissions to manage the global header and footer that will be displayed on Templates (Basic Contract Type Templates as well as Document Authoring Templates).

To add or edit the global header or footer, navigate to **Manage/Setup** - **Document Templates** - **Template List**.

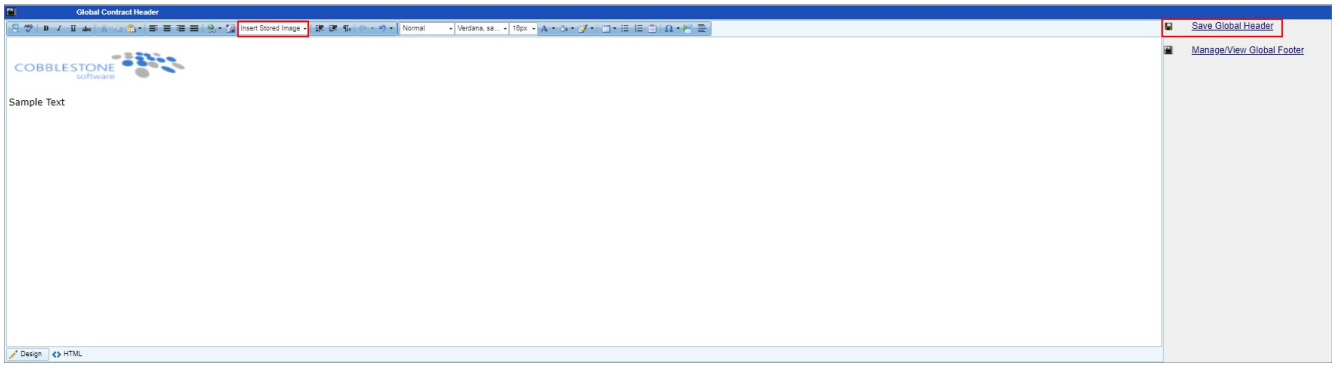


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Click either **Manage Global Header** or **Manage Global Footer** on the side menu.



Both of these links will open a Word-like HTML editor where you can enter text or insert a stored image (from the Image Library) (i.e. your organization's icon/image).



To Insert a Stored Image from the Image Library:

Click the **Insert Stored Image** drop down and select the image you would like to have displayed in the Header or Footer.

Note: For more information about uploading an Image to the Image Library to be used in the Global Header/Footer, see the Image Library Wiki page.

Once you have added or edited the Header/Footer, be sure to save.

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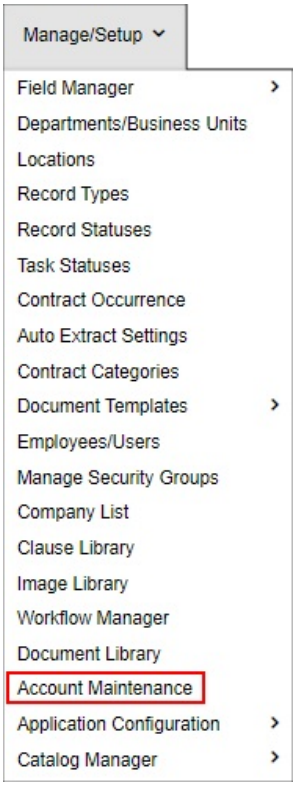
Configuration and Data Migration Scripts

Configuration & Data Migration Scripts

Configuration & Data Migration Scripts

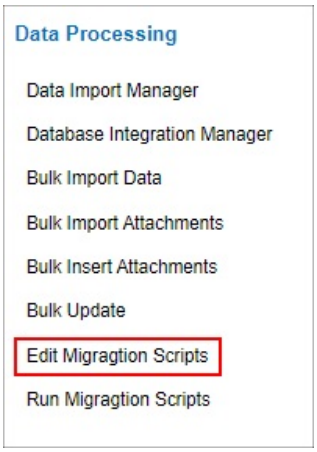
Configuration and Data Migration Scripts may be created through Contract Insight's user interface to copy data from one Contract Insight system to another.

To configure this, System Admins should click **Manage/Setup**, then **Account Maintenance**.

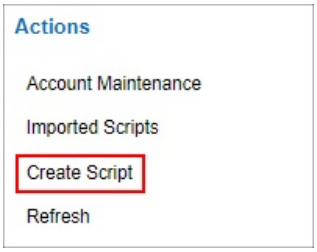


Once brought to this screen, click **Edit Migration Scripts** under the Data Processing side menu.

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Next, under the Actions side menu, click **Create Script**.

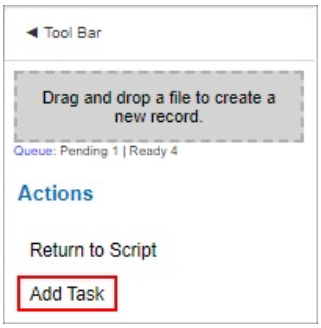


The System Admin will now be brought to an area in which they may create a name and description. Fill out these fields as desired and click **Save** upon completion.

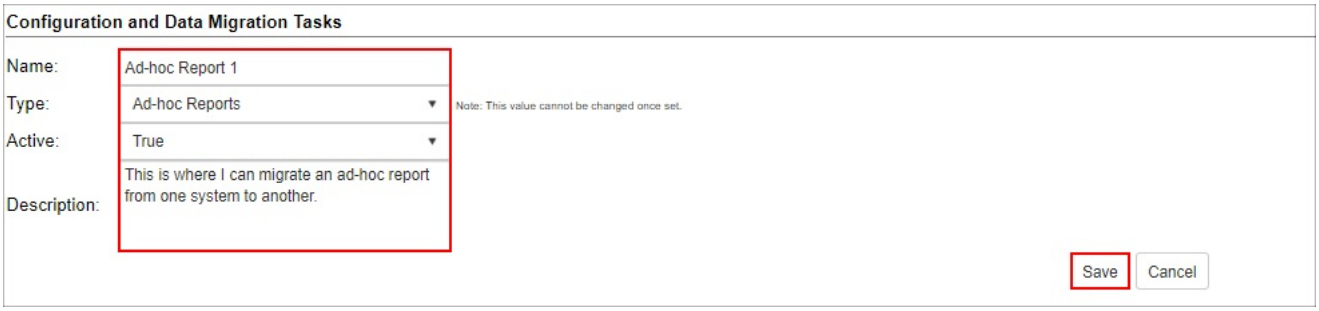


Now, in that script, System Admins will be able to add tasks to the script, which begins the process of bringing over a dashboard, Ad-hoc report, etc. Under the Actions side menu, click **Add Task**.

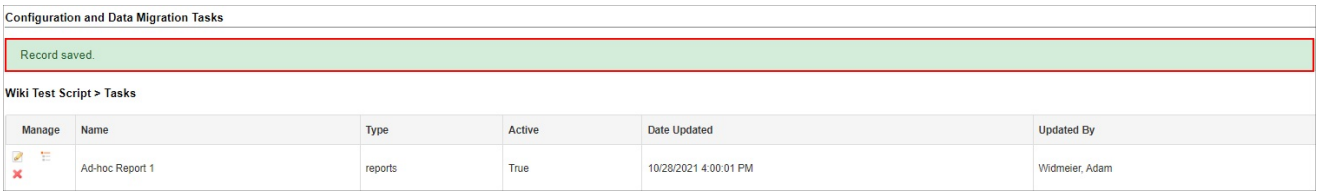
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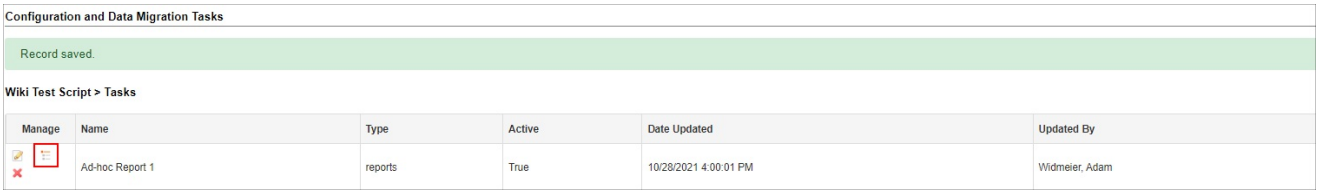
Once here, fields must be filled out before continuing. Name the task, and then select its type, which is the area which will be brought over. The Admin may mark whether the task is Active. When everything is filled out, click **Save**.



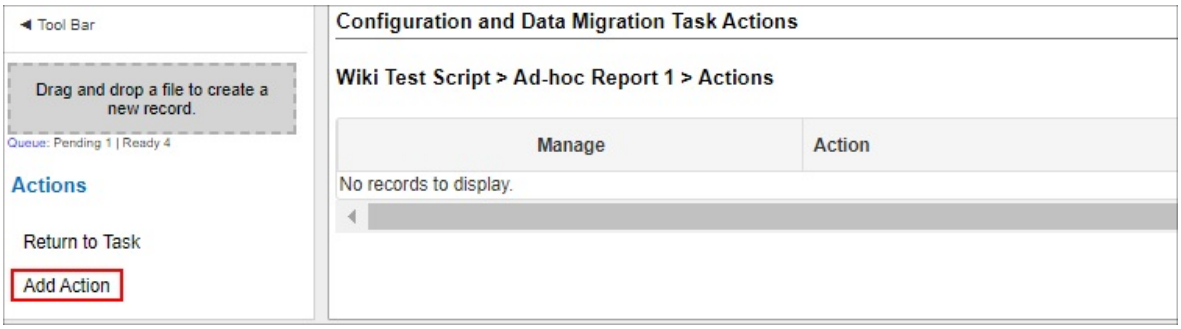
Upon clicking save, the system will bring the Admin to the tasks screen, where all current tasks within that script will reside.



The next step will be creating an action. Specifically, this is when the System Administrator will say which report, workflow step, dashboard, etc. specifically they wanted migrated over. To do this, click the **Tasks Icon** ( ). Then, once in the Task Actions screen, click **Add Action**.

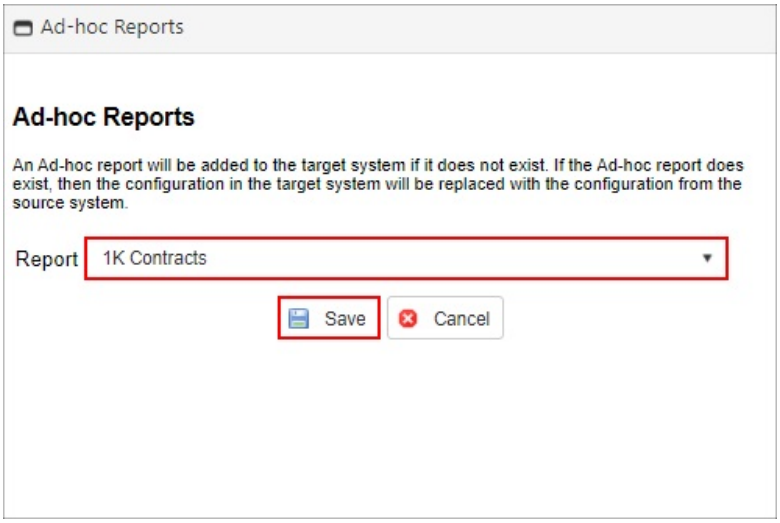


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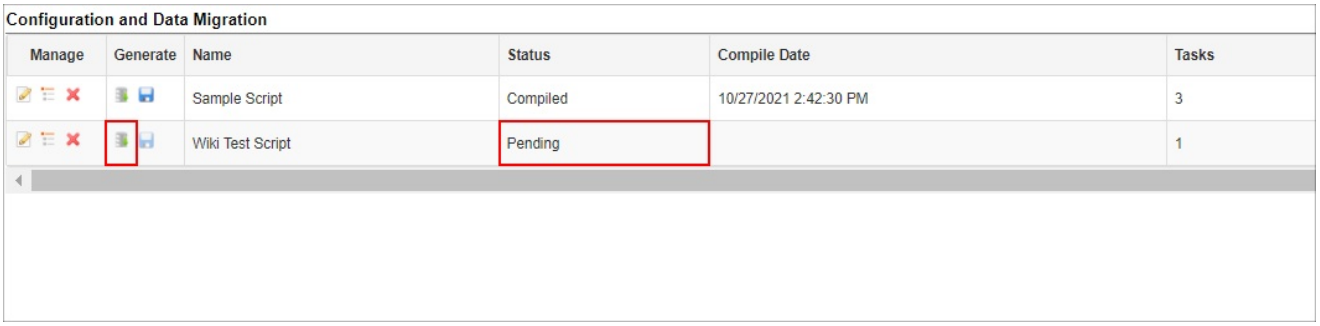


This is where the system is looking for a specific area to migrate. For Ad-hoc Reports, which specific Ad-hoc Report will be migrated? From the Report dropdown, select the desired report. Once complete, click **Save**. This step will be repeated for every action that must be migrated.

NOTE: More than one item can be migrated at once. This can be multiple Ad-hoc Reports, a combination of workflow steps, dashboardsr, etc.

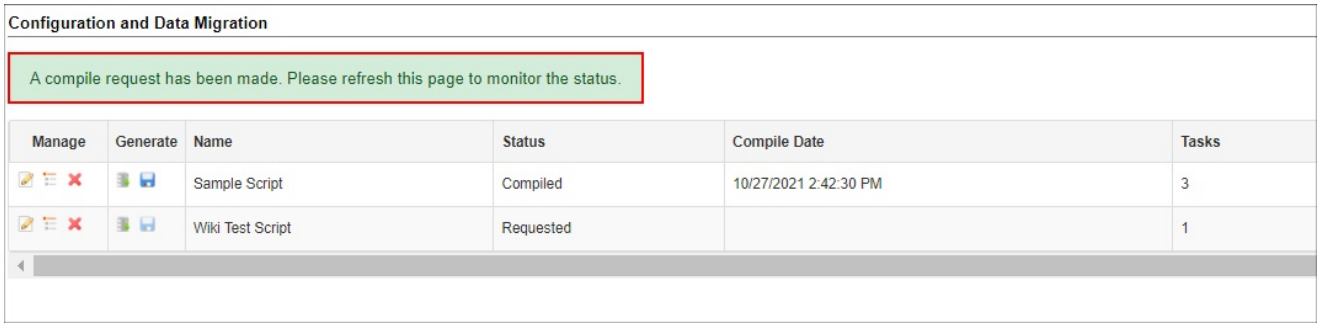


When complete, the System Administrator may compile the script. Click the **Compile Icon** ( ).



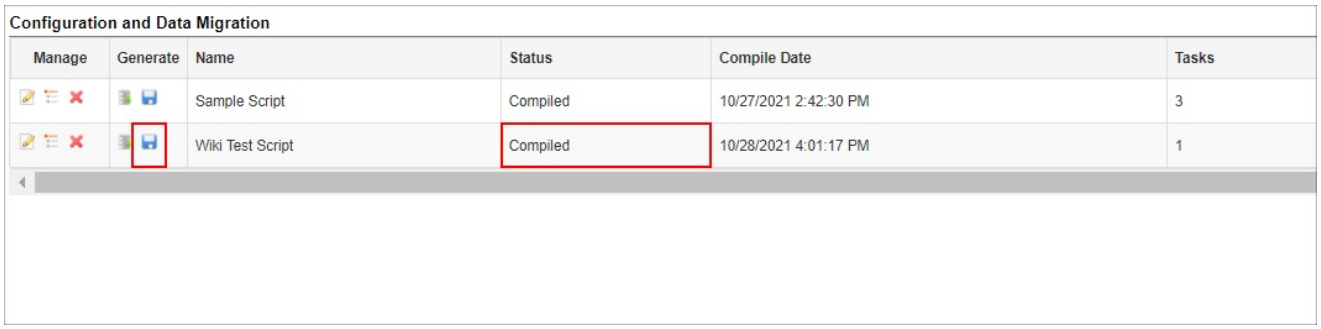
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The system will now begin processing the request and the Admin will receive the following message on their screen.



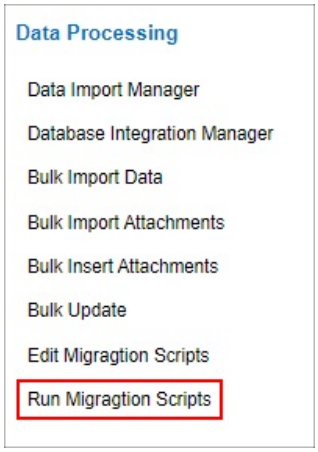
Scripts with much more information included within may take longer than others. Refresh the page accordingly until the download icon ( ) is un-greyed.

Once the script is ready to be downloaded, the status will change to “Compiled”. Once ready, click the **Download Icon** to download the script. The script will be downloaded as a .ZIP file.



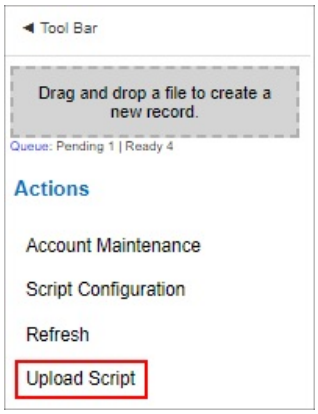
Migrating the Script from Another System to the Desired System

Again, click **Manage/Setup**, then **Account Maintenance**. Under the Data Processing side menu, click **Run Migration Scripts**.

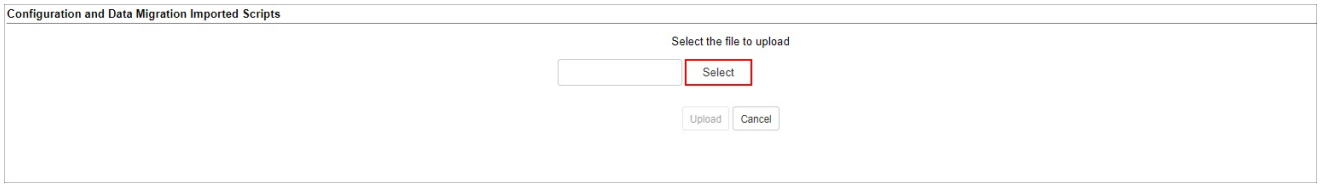


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Once in this screen, click **Upload Script**. This is the area in which the newly compiled script from the previous system will be uploaded and reflected in the new system.



The system will then allow the Administrator to select the file they would like to upload. From here, click **Select** and find the link that was previously downloaded. **The whole .ZIP file must be selected**, not just any file housed within the .ZIP file.



Once the correct file has been selected, click **Upload** to commit the migration to the system. Please be sure to check if scripts have been migrated correctly. For example, if an Ad-Hoc report has been migrated, navigate to the Ad-Hoc report list screen to assure that the newly migrated report is present.



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Create User-Defined/Custom Fields

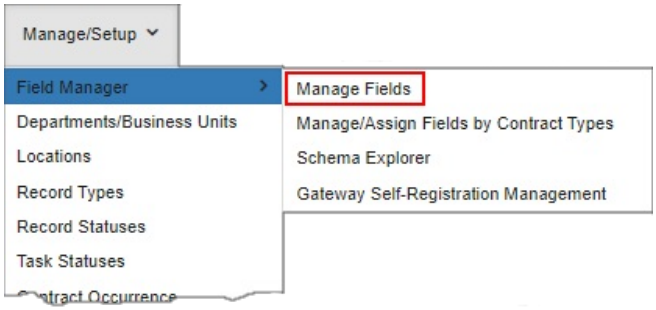
Create User-Defined/Custom Fields

Field Manager: Overview

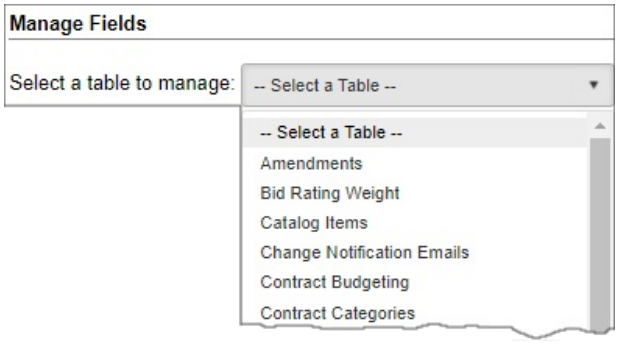
Contract Insight supports an unlimited number of easy-to-create, user-definable fields. Contract Insight includes standard fields and enables your organization to create unlimited user-definable fields and assign each field per each contract type. This offers the flexibility to gather and track all of the critical information that your organization requires, and track various fields per contract type. In addition, each field has a customizable field label and pop-up help description. Contract Insight's Field Manager also offers the flexibility of various field types (text, date, currency, number, decimal, drop-down, multi select, etc.) with required and not-required settings.

Create a User-defined Field

1. Select **Field Manager** from the **Manage/Setup** menu option.



2. From the drop down menu, select the table for which the field is to be created. The field selector screen displays.

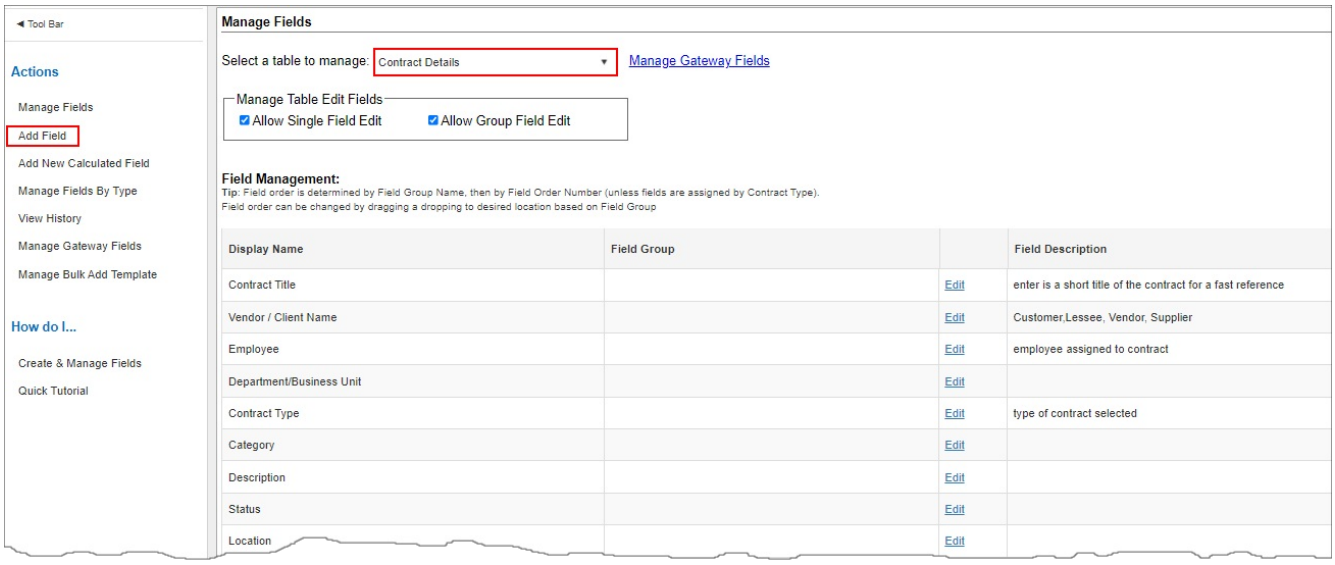


3. All existing field names display.

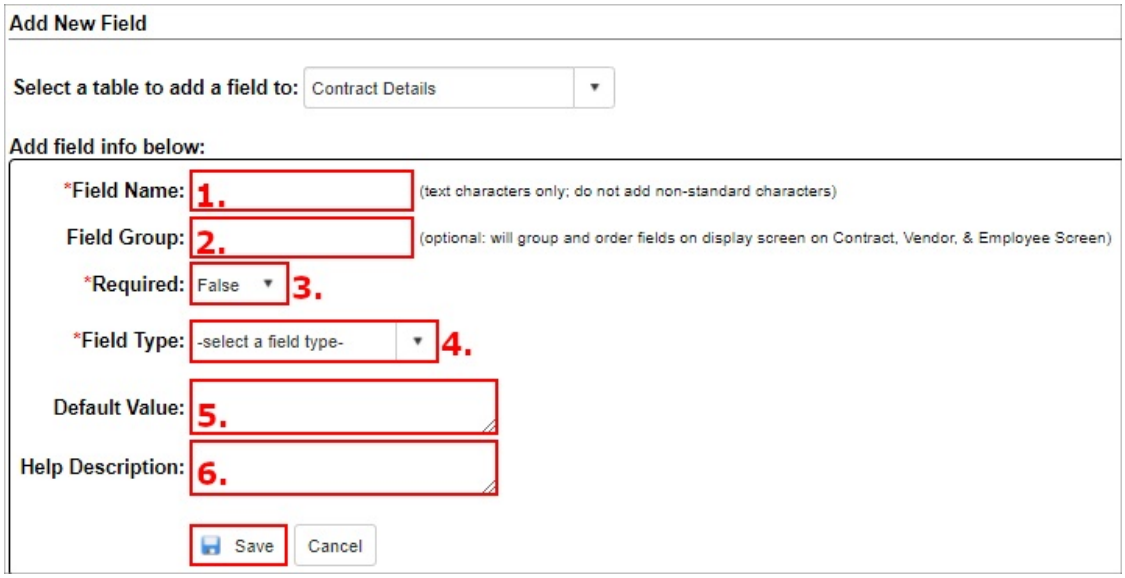
Note: This interface can be utilized to scroll through the records and make data changes (there is no undo option - all changes are final). If there are user-defined fields entered, you will be presented with the option to manage the field values and/or delete the custom field. All changes are final and cannot be undone. System fields cannot be deleted.

4. Click **Add Field**.

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5. The field manager **Add Field** form displays.



1. Enter the Field Name

2. (Optional) Field Group

3. Field Type (select from list-see below for options available)

4. Field Length

5. Default Value

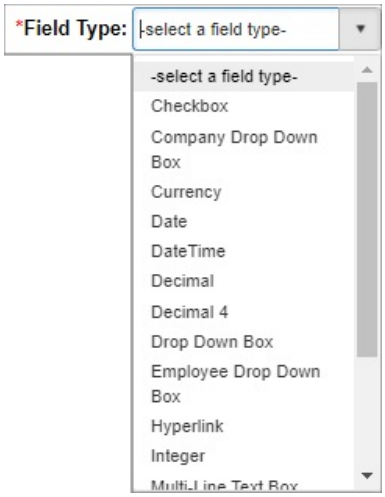
6. Required Value (True or False)

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7. (Optional) Help Description

Note: For field types of **Drop Down Box**, **Slider** or **Multi-Select List Box**, values entered into the **Default Value** box should be entered, separated by commas, with no spaces. (i.e. Yes,No,Maybe).

Field Types:



Text	The Text field type can be used to save characters or a mix of characters and numbers. The text field type will create a "varchar" data type in the underlying table.
Integer	The Integer field type can be used to save integer numeric values. This can be used for whole numbers.
Checkbox	The Checkbox field type can be used to create a field that can save a TRUE or FALSE value visually as a tick mark.
Currency	The Currency field type can be used to create a field that can save currency data.
Date	The Date field type can be used to create custom fields that can save dates. Dates should be formatted as 'mm/dd/yy' or 'mm/dd/yyyy'.
Date Time	The Date Time field type can be used to create custom fields that can save dates and times.
Drop Down	The Drop Down field type can be used to create a custom field that contains list items to pick from. Enter the list items (separated by commas using NO spaces after the comma) in the default value box.
Multi Select Drop Down	The Multi-Select field type can be used to create a custom field that contains list items to pick from. This differs from a Drop Down in that the user can select multiple items from the list. Enter the list items (separated by commas using no spaces after the comma) in the default value box.
Multi Line Text Box	The Multi-Line Text field type is similar to the Text field type in that it can be used to save characters or a mix of characters and numbers. This multi-line text box differs from a text box in that the user can enter multiple lines of text into multiple lines (the text box will not wrap into multiple lines as a multi-line text box will).
Hyperlink	The Hyperlink field type is used to include a clickable link to a URL or email address. This field type has three options from which to select upon creation: Email Link, URL Link, and URL Link (open in a new window). Email allows an email address to be entered and, when clicked, launch the user's default mail manager with the address pre-populated in a new message. The two URL Link options are for web addresses and to open in the record's window or in a new window/tab. Friendly Text can be entered so users so not see the address but specified text instead.

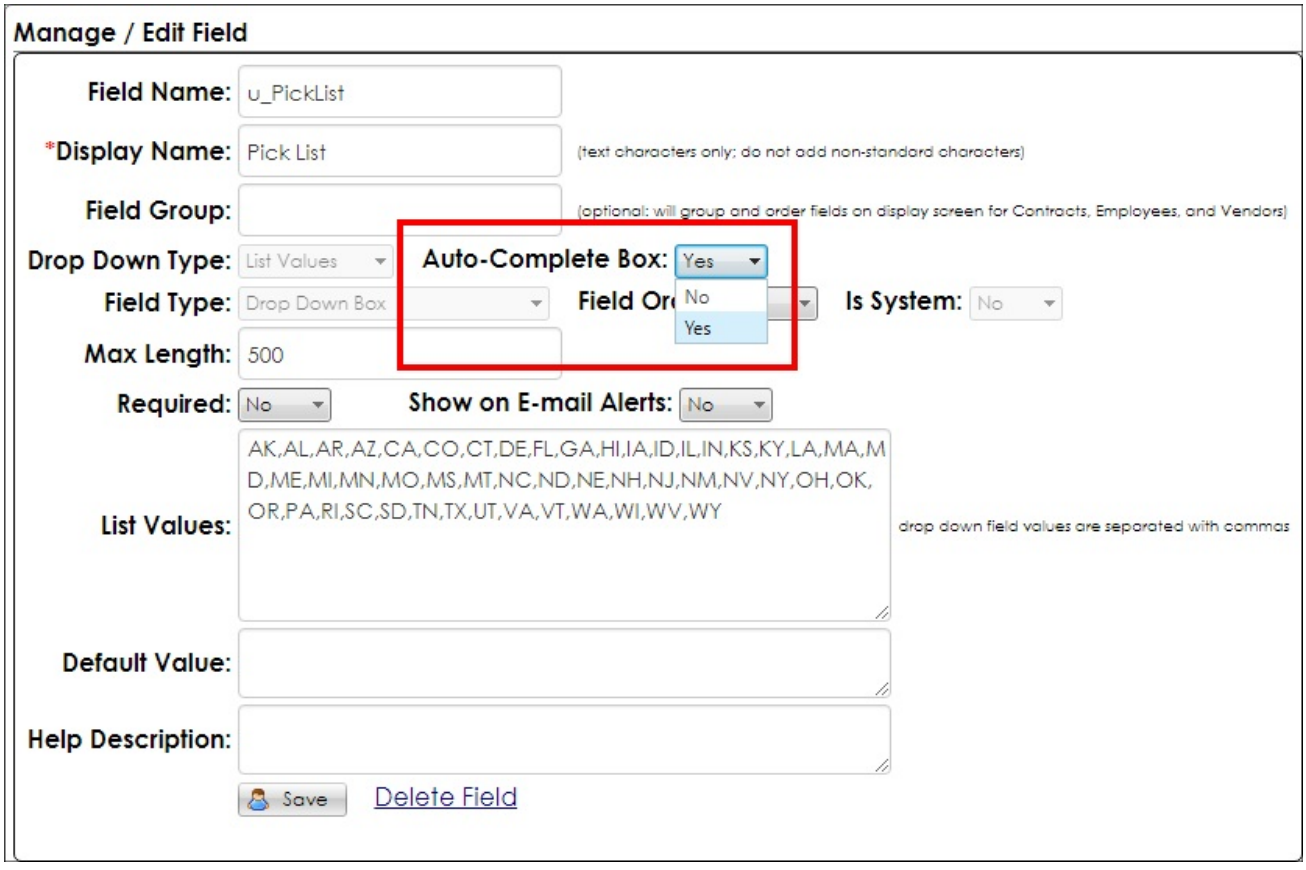
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Password	The Passwords field type allows users to enter "password" values that hide the actual values with password-type characters.
Rich Text Editor	The Rich Text Editor field type is similar to the Multi-Line Text field but allows formatting and additional options when adding/editing the field value.
Slider	The Slider field type can be used to create a custom field that contains list items from which to pick. This differs from a Drop Down field in that all options are displayed and a sliding indicator is used to select an option. Enter the list items (separated by commas using no spaces after the comma) in the default value box.
Decimal	The Decimal field type allows users to enter a decimal value with a two (2) digit number to the right of the decimal.
Decimal 4	The Decimal 4 field type allows users to enter a decimal value with a four (4) digit number to the right of the decimal.

Note: The system does not permit duplicate custom field names.

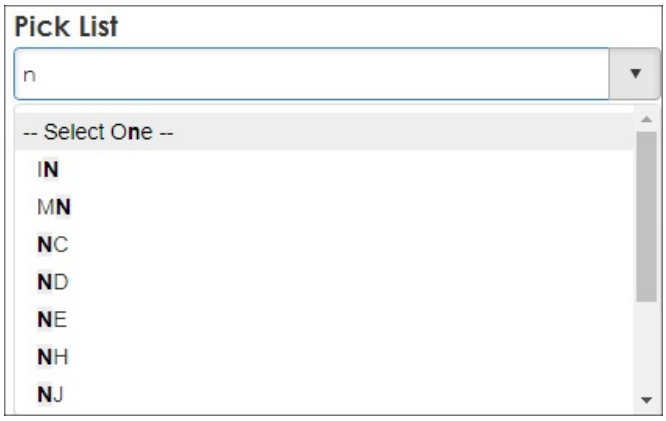
Drop-Down Fields

Drop-Down fields offer an additional option, **Auto Complete Box**.



If set to Yes, the field allows users to type into the field to filter the results to those containing the string entered. Users can then select from the filtered options.

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Notes:

While **Auto Complete Box** adds a nice aesthetic to drop-down fields, it also reduces the page's load time due to limiting the number of results that populate when the page is first loaded.

Additionally, Contract Insight has intelligence built in to monitor the number of entries for a drop-down field. If the number of entries exceeds the intelligence threshold, the drop-down field is automatically given the auto complete functionality.

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Field Groups

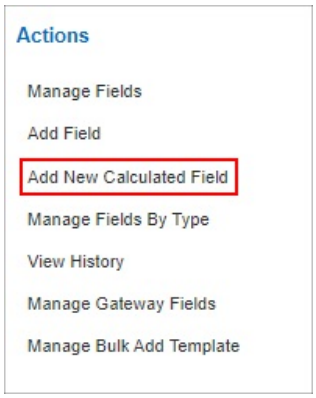
Establishing field groups associates fields named within the group. For example, fields in the group **Record Information** will always be displayed together. The display sequence of fields and groups is dependent upon alphabetic sorting of the group name and then by order number:



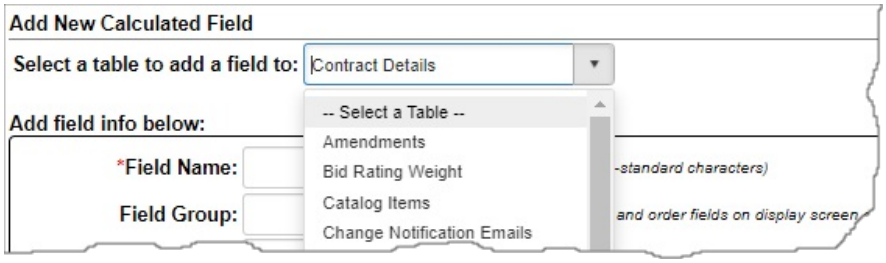
Add New Calculated Field

From the left side menu of the **Manage Fields** page, select **Add New Calculated Field**

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From the drop down menu, select the table for which the field is to be created. The field selector screen displays.



The field manager **Add New Calculated Field** form displays.

1. Enter the Field Name

2. (Optional) Field Group

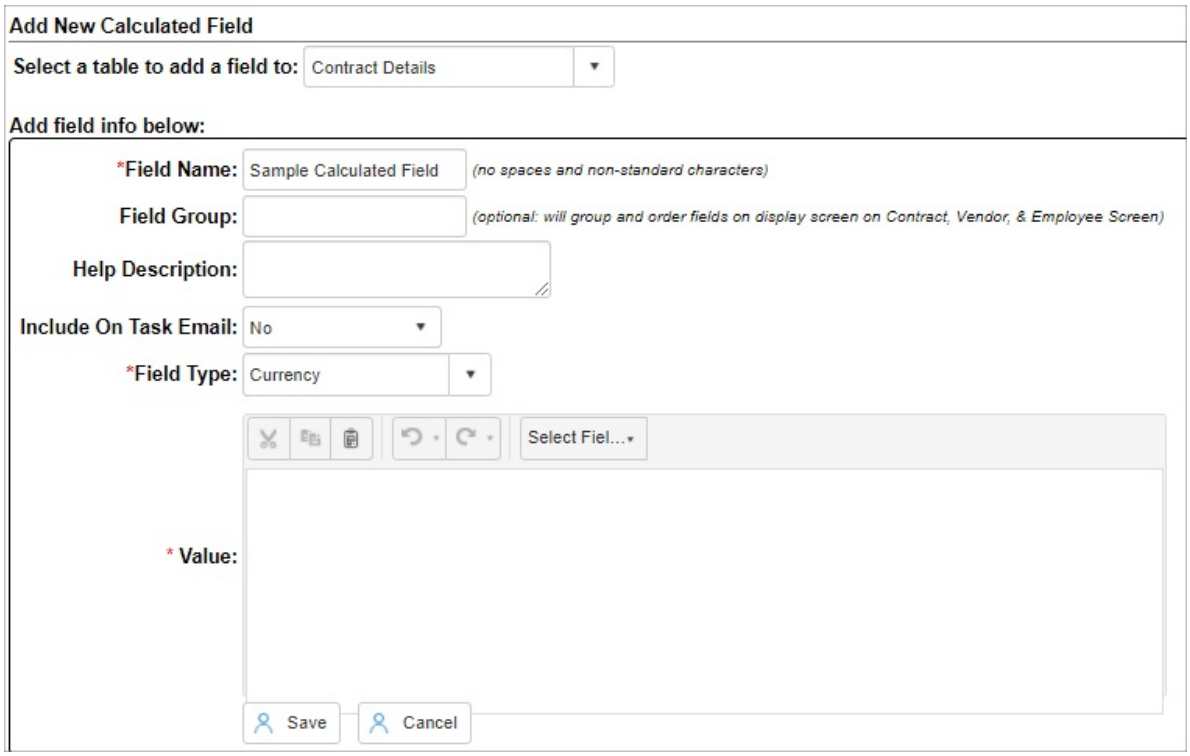
3. (Optional) Help Description

4. (Optional) Include On Task Email (defaults to No)

5. Field Type (select from list-see below for options available)

6. Value (Select the fields to calculate - Any standard arithmetic operation symbols (+, -, /, *) may be used when creating calculations)

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Calculated Field Types

Date Calculation (Integer)	The difference in 2 specified dates may be calculated by selecting the type, Date Calculation (Integer). This will allow for users to pick a difference in month, days, or years between 2 dates. This will allow for comparisons between any dates within the same table, or comparisons between one date and the current date.
Currency	Numeric calculation based on two applicable fields resulting in a value with 2 decimal places.
Date	Date calculation Users may create calculated date and date time values from existing fields based on a specified interval. This interval may calculate a value based on the given field's day, month, or year.
DateTime	Users may create calculated date and date time values from existing fields based on a specified interval. This interval may calculate a value based on the given field's day, month, or year.
Decimal	Numeric calculation based on two applicable fields resulting in a value with 2 decimal places.
Integer	Numeric calculation based on two applicable fields resulting in a value with 2 decimal places.
Text Box	Custom text values may be created based on any available field to create a calculated text box value. This might be useful for concatenating several descriptor fields into one field for reporting purposes that would allow for it to be considered a single column, rather than individual columns.

Note: A **Calculated Field Type** of Currency, Decimal, and Integer can include any field types that contains numeric-based values, however, the resulting calculated field will be converted to the specified type. For example, if Currency is the selected type, and it is pulling a calculation based on an integer value with no decimal places and another currency value with decimal places, it will convert the resulting calculation to a currency/decimal value with 2 decimal places.

Advanced Field Notes

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•	All user defined custom fields are saved to the table source with the prefix of "u_" appended to the field name. The end user will not see the "u_" prefix.
•	The Drop Down field types are saved to the table as a varchar(50) data type.
•	User defined field names cannot be modified.
•	User defined fields can be deleted, however, this action is permanent and all associated data saved in the user defined field is deleted.
•	System defined fields cannot be deleted or modified without customization.
•	Any field (standard or user-defined) may be included in email alerts.

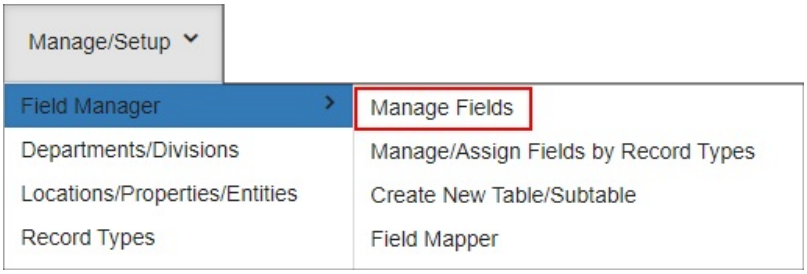
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Managing and Editing Fields

Managing and Editing Fields

Field Manager: Editing Fields

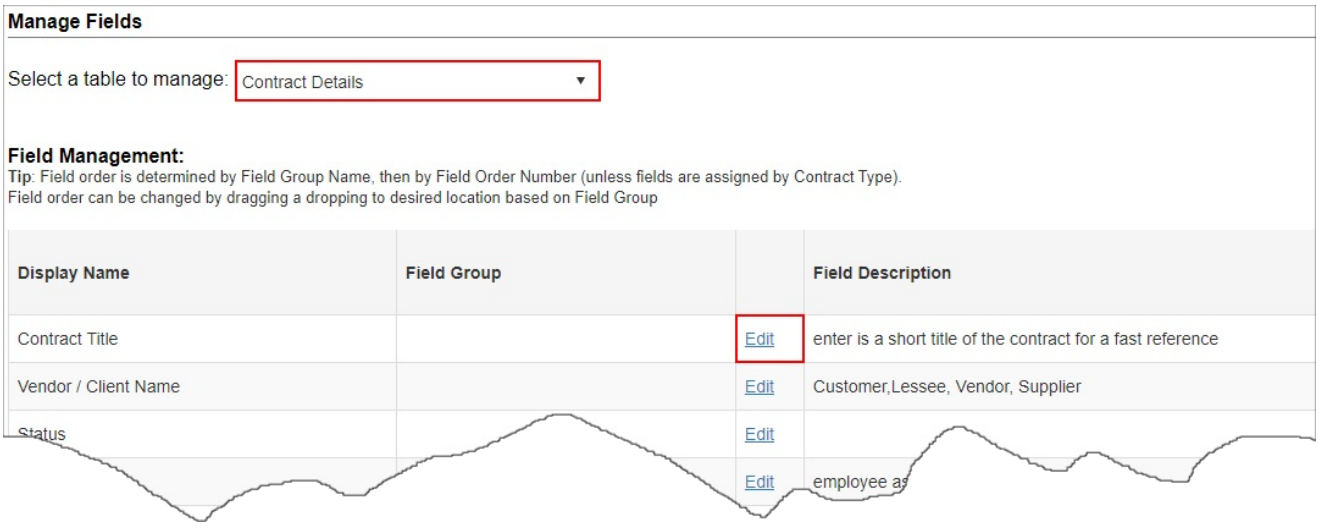
User-Defined and System fields can be edited, but only certain aspects of the field are able to be edited. To manage and edit fields, go to the **Manage/Setup** menu, select **Field Manager**, and then select **Manage Fields**.



The **Manage Fields** screen displays. From the **Select a table to manage** drop down menu, select the table for which to manage the fields. Once the table is selected, a list of all fields for the selected table shows.

Editing Fields

To edit a field, click **Edit** for the line item to be altered.



The Edit Field screen for the selected field opens.

Fields that cannot be edited are highlighted in red below:

- Field Name
- Field Type
- Is System (can the field be deleted or not)

Note: Fields that have **Is System** set to Yes cannot be deleted.

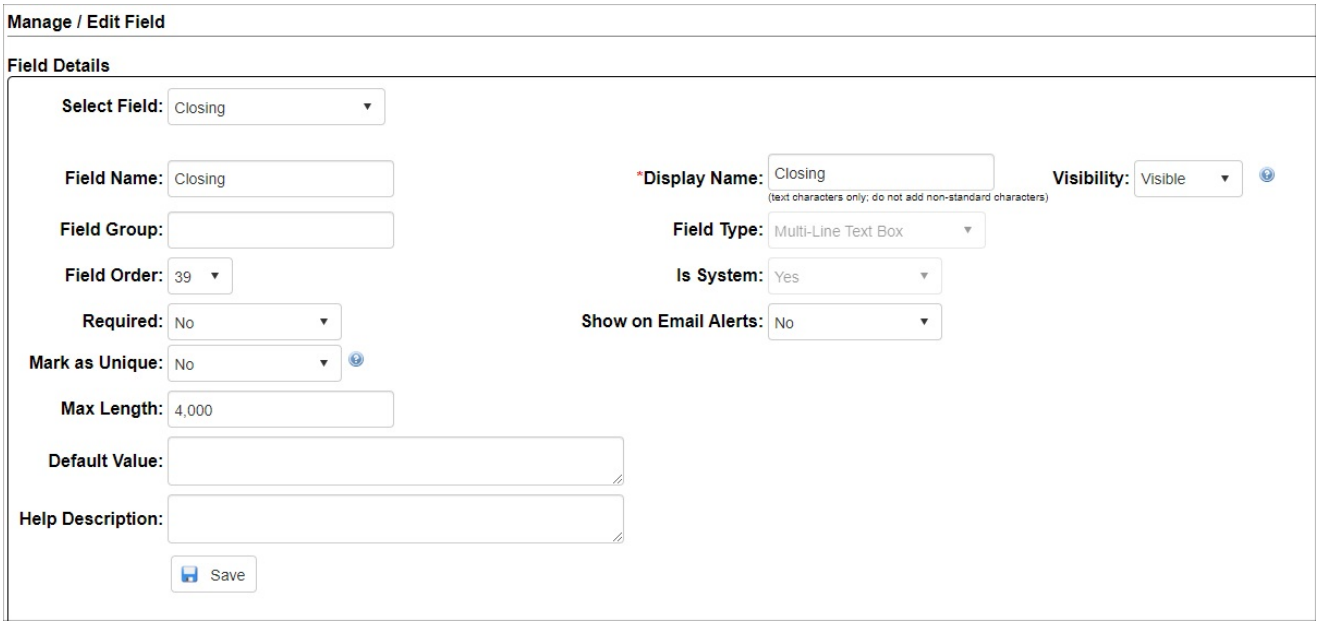
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Fields that can be edited are highlighted in green below:

- Display Name
- Field Group
- Field Order
- Required?
- Show on Email Alerts
- Help Description

Note: For Text Box, Drop Down, and Multi-Select List Box field types, the **Default Values** can be edited as well.

Once the Field has been edited, be sure to select the "Save" button to save any changes.

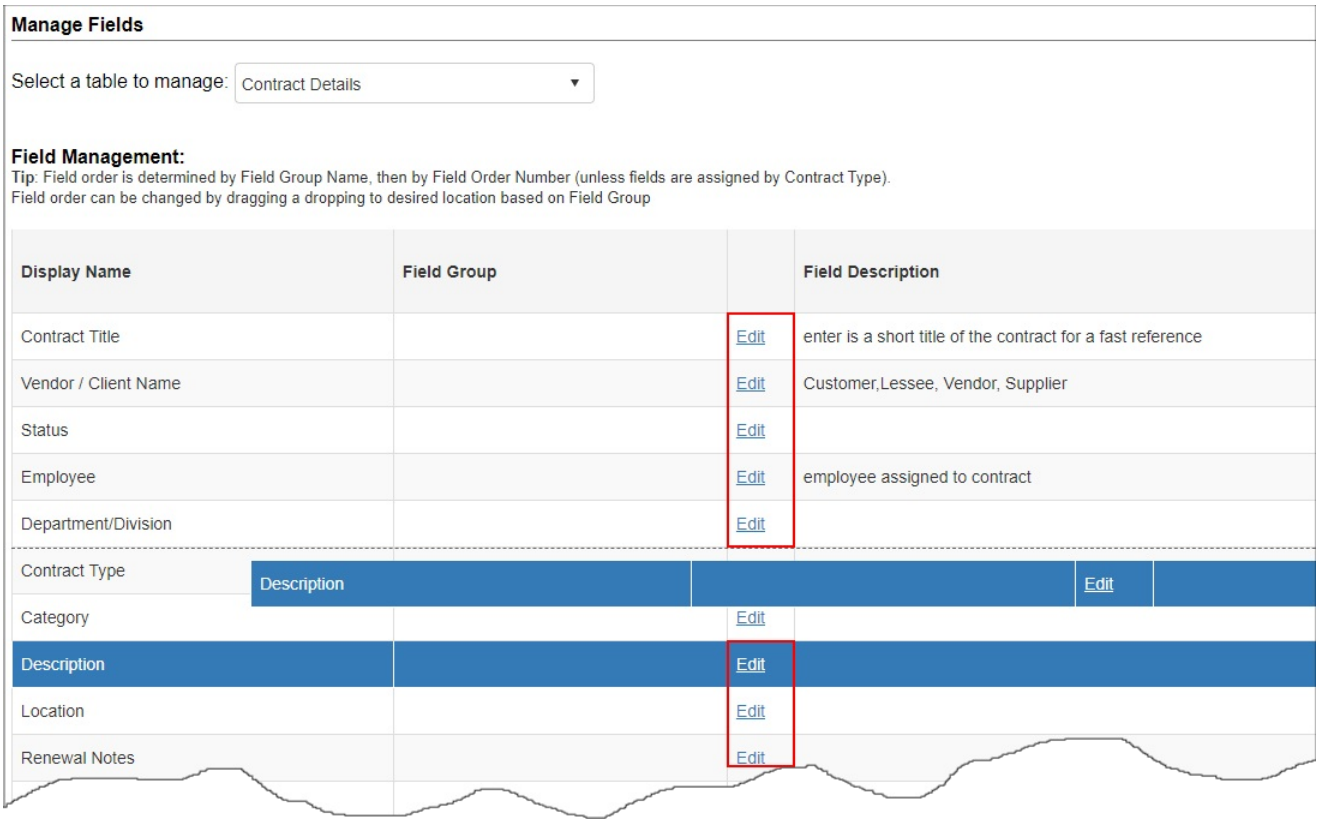


Reordering Fields

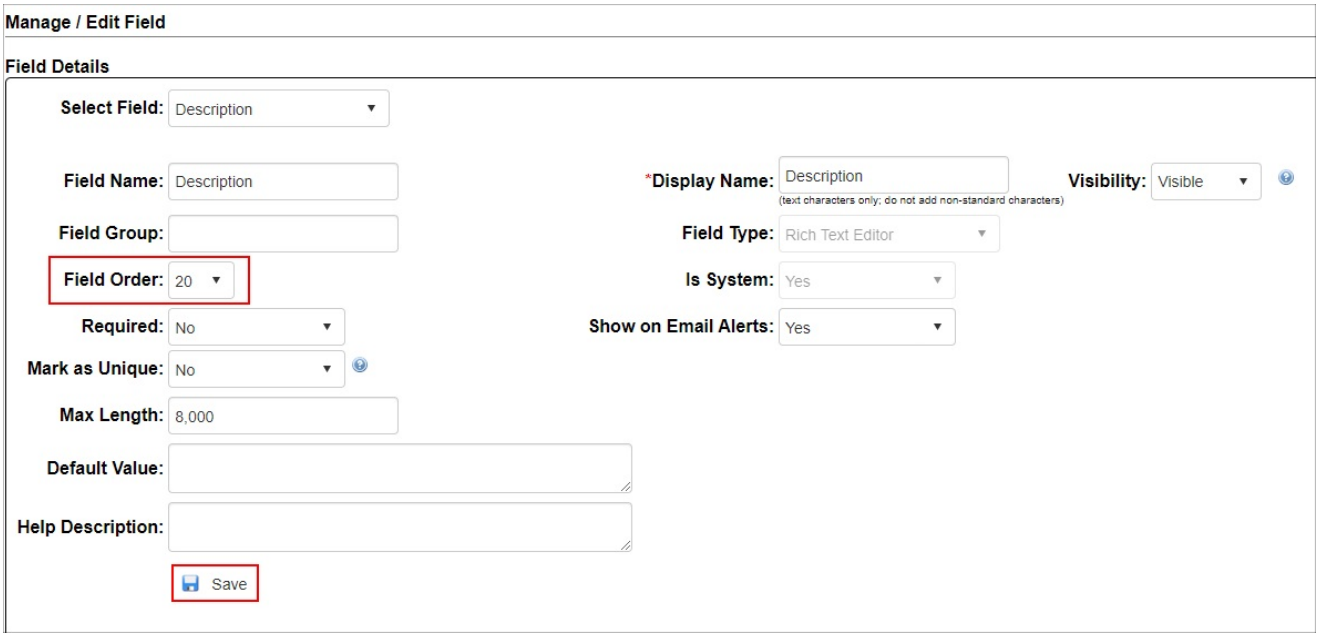
To move the order in which the fields are displayed, there are two options:

1. Drag and drop the field line item to move.

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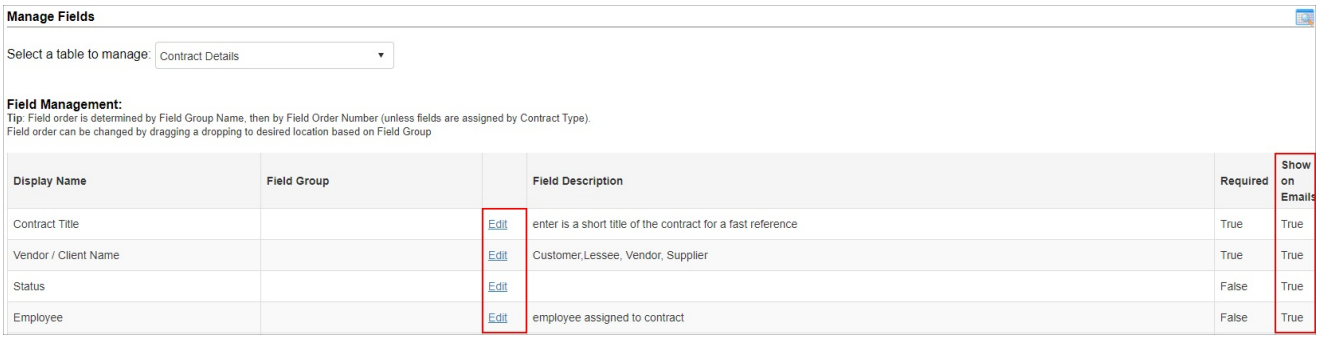
2. Click the **Edit** for the line item you would like to move and select the new position in **Field Order**.



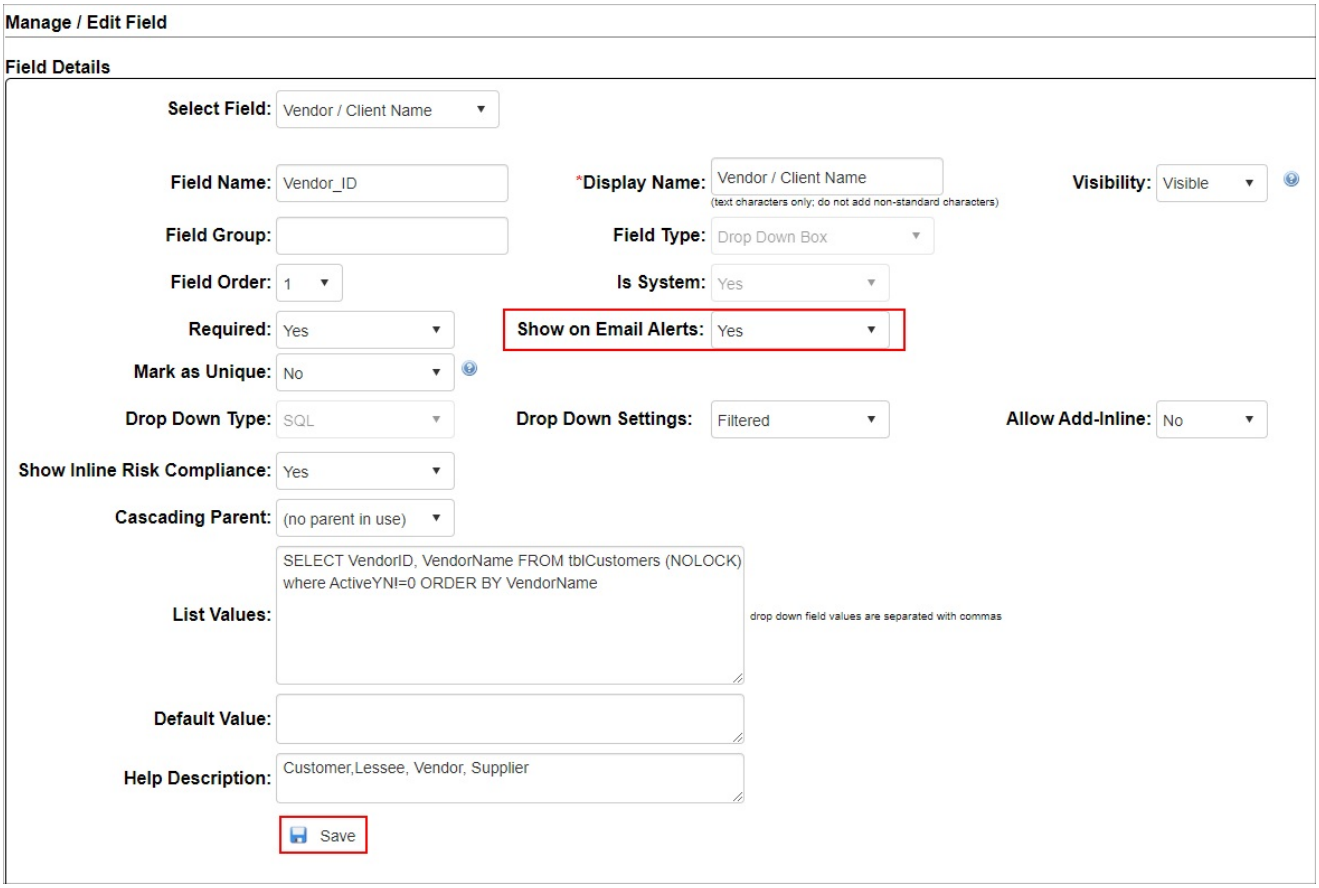
Specifying Which Fields will Show on Email Alerts

To specify which fields you would like displayed on e-mail alerts, go to the **Manage/Setup** menu, and navigate to **Field Manager** > **Manage Fields**. Select the table to manage from the drop down menu. The **Show on Emails** column displays for the field line items.

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To change whether a field is displayed on e-mail alerts, click **Edit** for the field to alter the **Show on E-mails**.



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Additionally, a complete breakdown of where the field is utilized is shown below field details.


Field Used on / Assigned to:

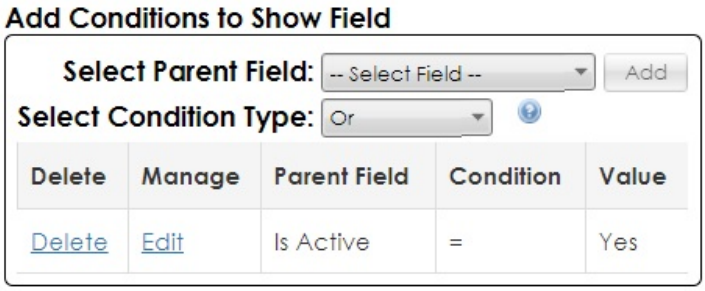
Used/Assigned On	Record's ID	For Record
Document Template	23	Sales Agreement
Document Template	45	_Training_Collaborative_Sales Agreement
Document Template	46	_Training_TopDown_Sales Agreement
Document Template	47	_Training_Collaborative_Sales Agreement - COPIED
Custom Mapped Fields/Tables	35	...tblContracts.Vendor_ID To: tblPurch...

This information is important when it comes to deciding if a field should be deleted from the application or not. It is a standard best practice not to delete any field that is currently being used anywhere within Contract Insight. Doing so risks breaking other parts of the application.

Show/Hide Fields Based on Field Values

Additionally, You are able to control a fields visibility based on another field's value.

The **Add Conditions to Show Field** table allows the setting of rules for the field visibility based on another field's value.



You select your **Parent Field** and click **Add** to bring you to another window for you to set your rules.



Operator has 2 options: **=** and **!=** (Equal to and not equal to) and **Value** is a pick-list of values from the **Parent Field** you had selected earlier.

Note: Be sure all **Fields Used On/ Assigned To** is empty before deleting a field.

Field Types

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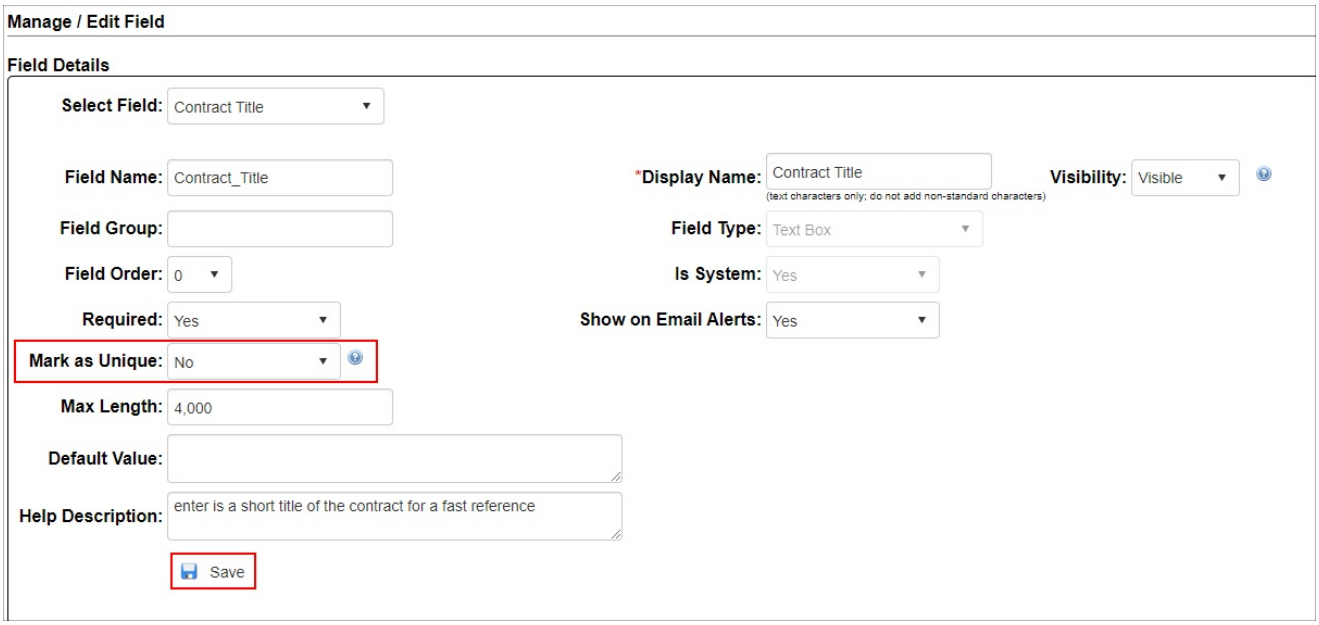
Text	The Text field type can be used to save characters or a mix of characters and numbers. The text field type will create a "varchar" data type in the underlying table.
Integer	The Integer field type can be used to save integer numeric values. This can be used for whole numbers.
Checkbox	The Checkbox field type can be used to create a field that can save a TRUE or FALSE value visually as a tick mark.
Currency	The Currency field type can be used to create a field that can save currency data.
Date	The Date field type can be used to create custom fields that can save dates. Dates should be formatted as 'mm/dd/yy' or 'mm/dd/yyyy'.
Date Time	The Date Time field type can be used to create custom fields that can save dates and times.
Drop Down	The Drop Down field type can be used to create a custom field that contains list items to pick from. Enter the list items (separated by commas using NO spaces after the comma) in the default value box.
Multi Select Drop Down	The Multi-Select field type can be used to create a custom field that contains list items to pick from. This differs from a Drop Down in that the user can select multiple items from the list. Enter the list items (separated by commas using no spaces after the comma) in the default value box.
Multi Line Text Box	The Multi-Line Text field type is similar to the Text field type in that it can be used to save characters or a mix of characters and numbers. This multi-line text box differs from a text box in that the user can enter multiple lines of text into multiple lines (the text box will not wrap into multiple lines as a multi-line text box will).
Hyperlink	The Hyperlink field type is used to include a clickable link to a URL or email address. This field type has three options from which to select upon creation: Email Link, URL Link, and URL Link (open in a new window). Email allows an email address to be entered and, when clicked, launch the user's default mail manager with the address pre-populated in a new message. The two URL Link options are for web addresses and to open in the record's window or in a new window/tab. Friendly Text can be entered so users so not see the address but specified text instead.
Password	The Passwords field type allows users to enter "password" values that hide the actual values with password-type characters.
Rich Text Editor	The Rich Text Editor field type is similar to the Multi-Line Text field but allows formatting and additional options when adding/editing the field value.
Slider	The Slider field type can be used to create a custom field that contains list items from which to pick. This differs from a Drop Down field in that all options are displayed and a sliding indicator is used to select an option. Enter the list items (separated by commas using no spaces after the comma) in the default value box.
Decimal	The Decimal field type allows users to enter a decimal value with a two (2) digit number to the right of the decimal.
Decimal 4	The Decimal 4 field type allows users to enter a decimal value with a four (4) digit number to the right of the decimal.

Note: The system does not permit duplicate custom field names.

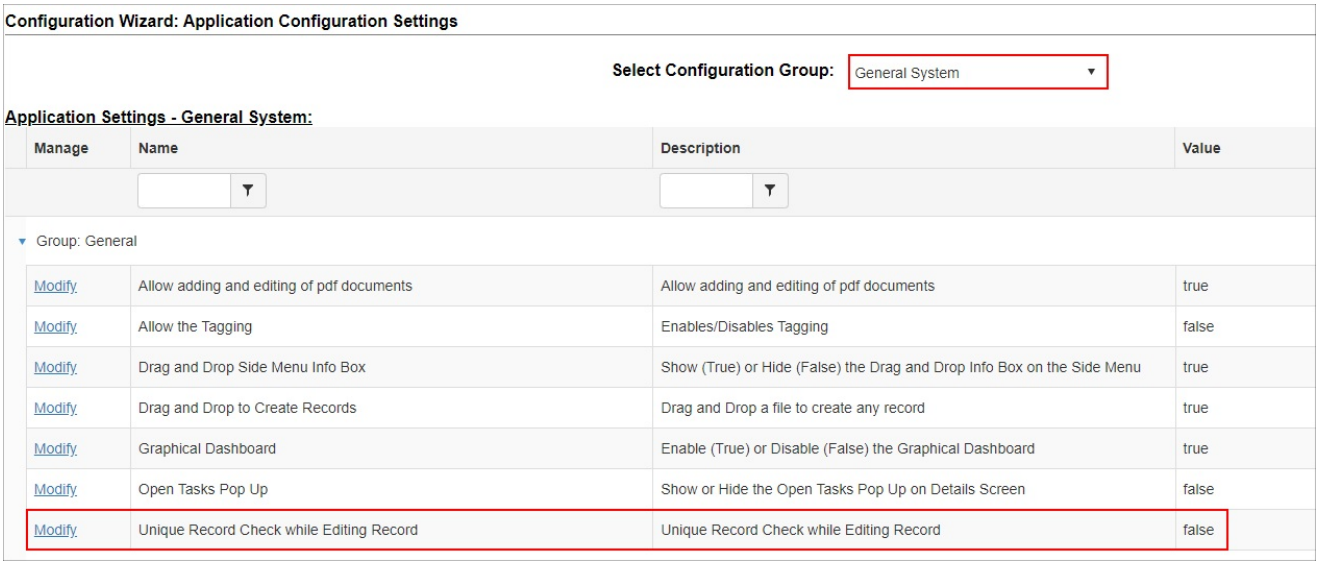
Unique Values

CobbleStone provides a method of ensuring unique values are entered for a given field and that no two (or more) records share the same value.

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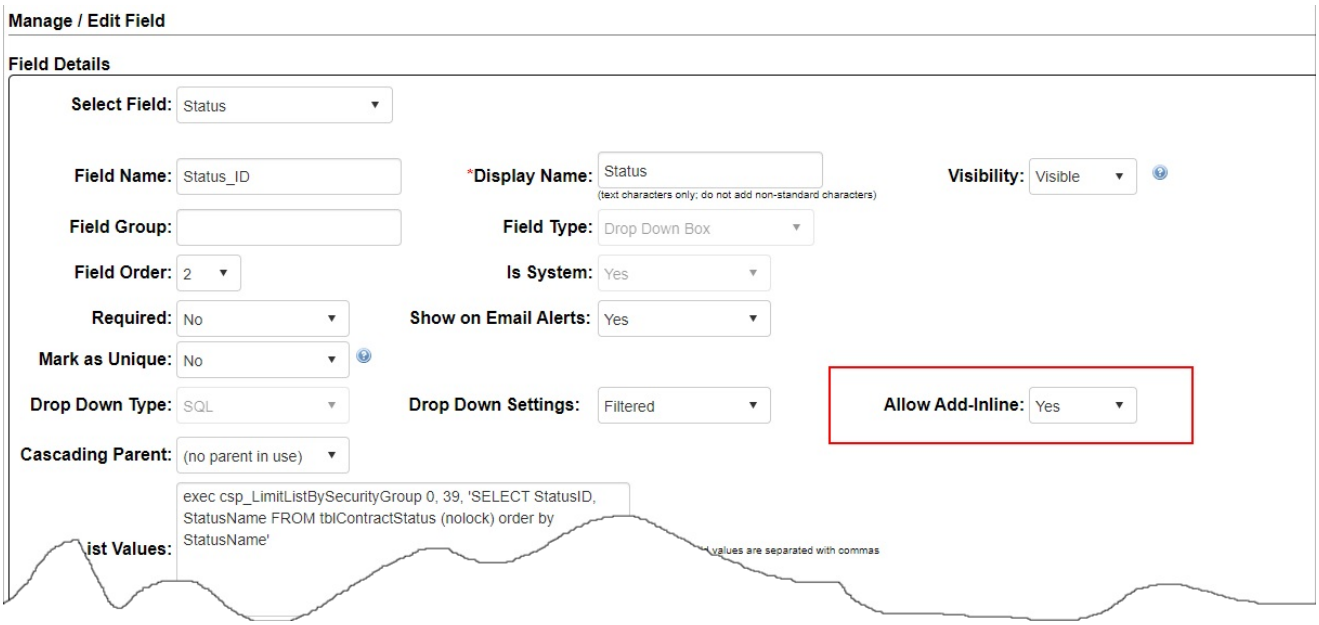
Note: To enable duplicate checking from the Edit/Details screens, navigate to **Mangaae/Setup - Application Configuration**, select the General System group, and set **Unique Record Check while Editing Record** to True. This setting impacts all fields with duplicate checking enabled.



In-Line Value Adding

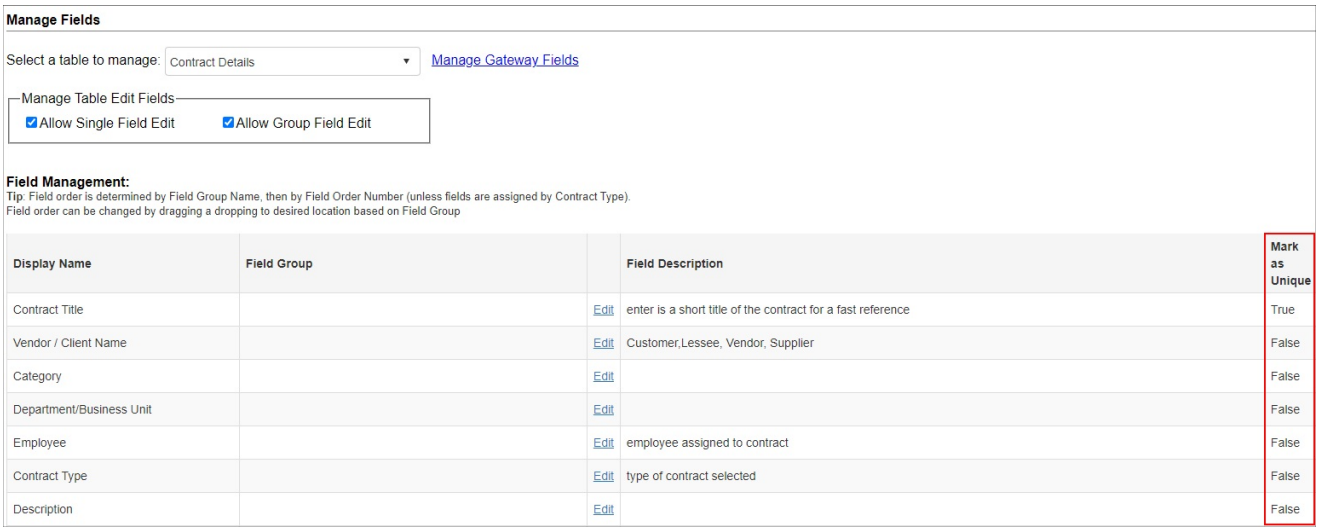
Coupled with permissions is an option to add counterparty, MRD, and/or employee records in-line when adding a new record. To permit in-line adding for a field, from the Field Manager for that field, set **Allow Add-Inline** to Yes.

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Show 'Mark as Unique' on Field Manager grid

Updated the Field Manager to show the 'Mark as Unique' column on the grid so users do not have to open the field to see which are set as unique.



Display Name	Field Group		Field Description	Mark as Unique
Contract Title		Edit	enter is a short title of the contract for a fast reference	True
Vendor / Client Name		Edit	Customer,Lessee, Vendor, Supplier	False
Category		Edit		False
Department/Business Unit		Edit		False
Employee		Edit	employee assigned to contract	False
Contract Type		Edit	type of contract selected	False
Description		Edit		False

Advanced Field Notes

•	All user defined custom fields are saved to the table source with the prefix of **u_** appended to the field name. The end user will not see the **u_** prefix.
•	The Drop Down field types are saved to the table as a **varchar** data type.
•	User defined **field names** cannot be modified. Their **display names**, however, can be.
•	User defined fields can be deleted, however, this action is permanent and all associated data saved in the user defined field is deleted.
•	System defined fields cannot be deleted or modified without customization from CobbleStone Software.

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•	Any field (standard or user-defined) may be included in email alerts.

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Assign Fields by Contract Type

Assign Fields by Contract Type

Field Manager: Assign Fields by Contract Type

Contract Insight allows Application Administrators to assign fields by contract type. This allows the system to assign and display fields for each record type: contract, request, and customer/vendor/counterparty. While this is optional, however, all fields from the details table that are set up in the field manager for the Contract Table/Screen will display for any contract type for which the fields are not specified (refer to the field manager section for more information).

Assign Fields by Contract Type

1. Log into the system as an Application Administrator.

2. Select **Manage/Assign Fields by Record Types** from the **Manage/Setup** menu



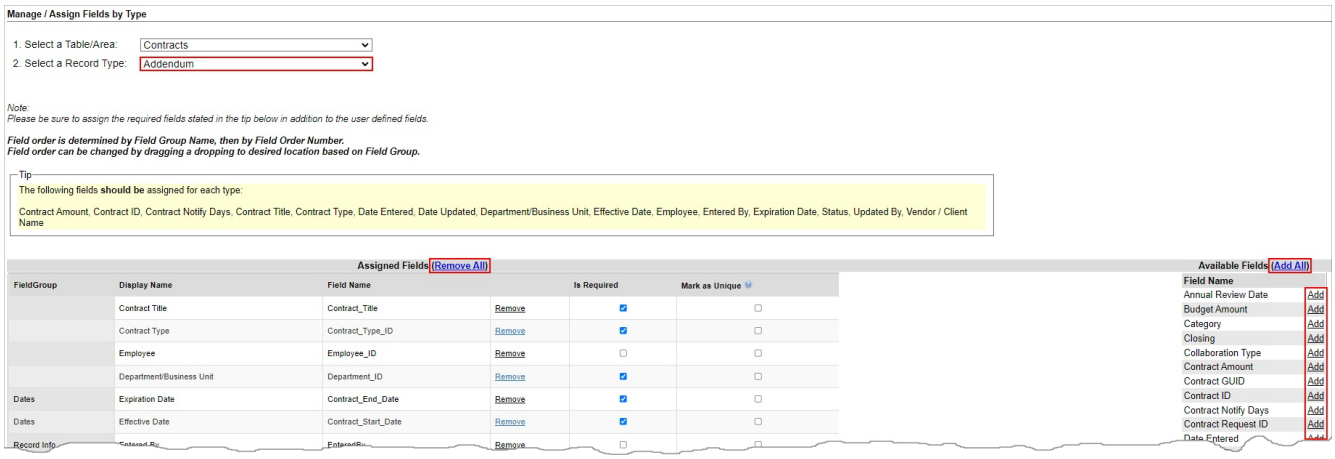
3. The **Manage Fields by Contract Types** screen appears.

4. From the **Manage Fields: Select a Type** menu, select the table for which to edit a record type.



5. Then select the record type to which you would like to assign fields.

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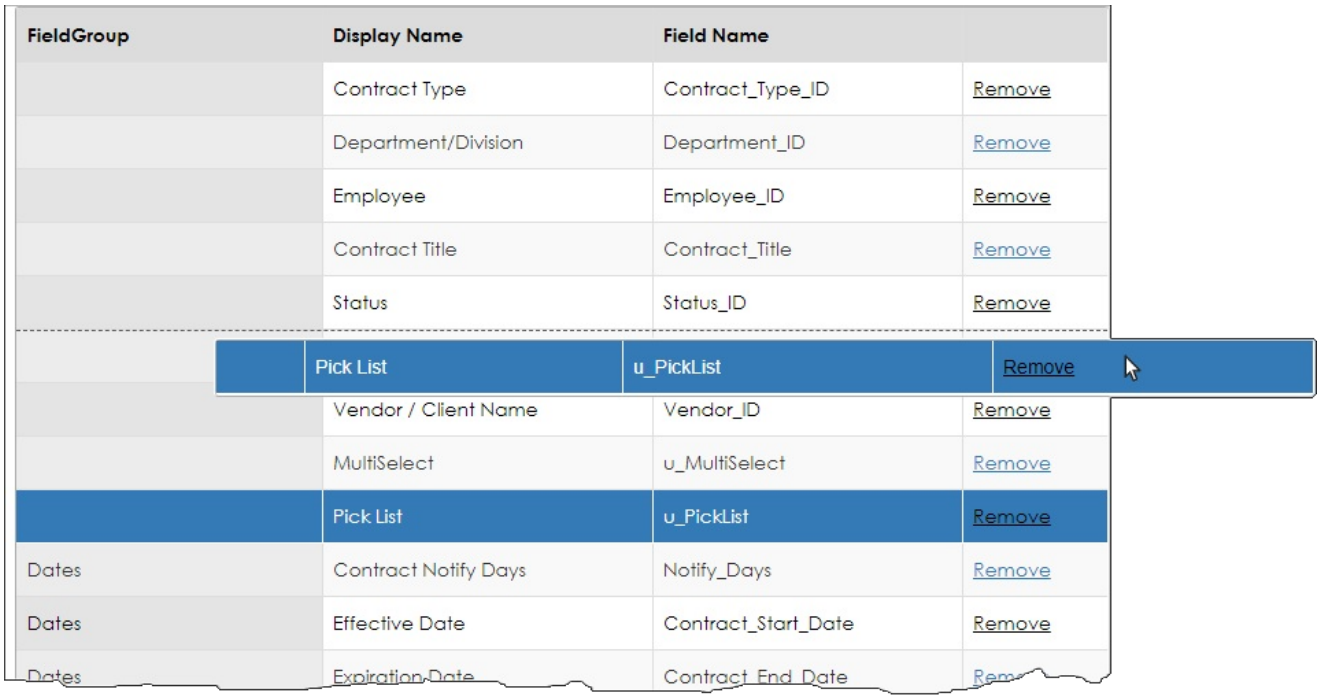


Admin users may add, and remove fields that are assigned to each contract type.

Admin users may remove all currently assigned fields from a type by clicking **Remove All**.

Admin users may add all fields to the selected type by clicking **Add All**.

Admin users may order the fields assigned to a type via drag and drop.



CobbleStone Software recommends that some fields be placed on all contract types (with some exception). The suggested fields are listed on each type's **Manage/Assign Fields by Type** screen.

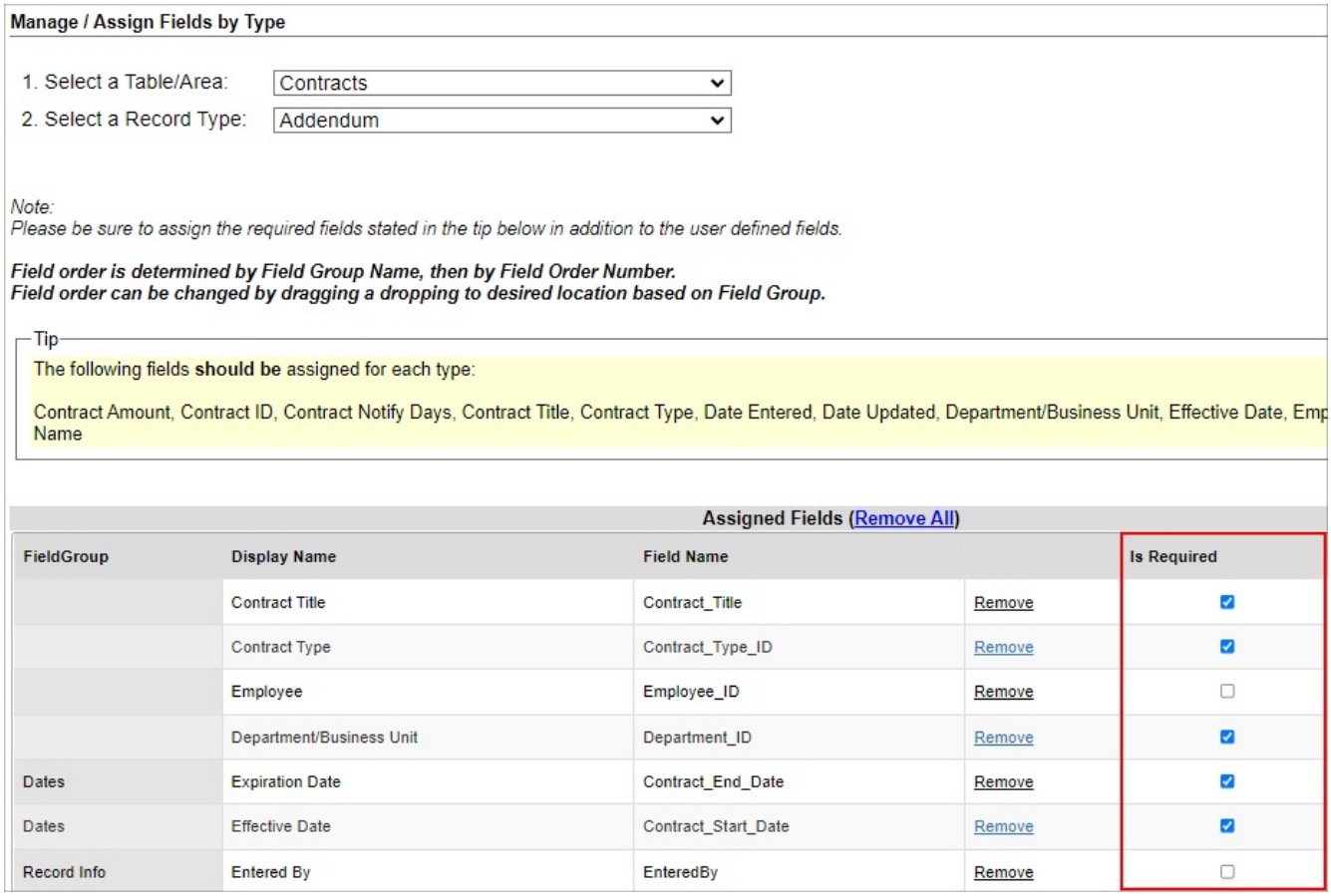
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Note: New types are not populated with fields.

Required Fields by Type

Once you have selected a Table and type of record you see the field selection. In the field selection you can choose to make a field required or not and you can do this for each type of record.



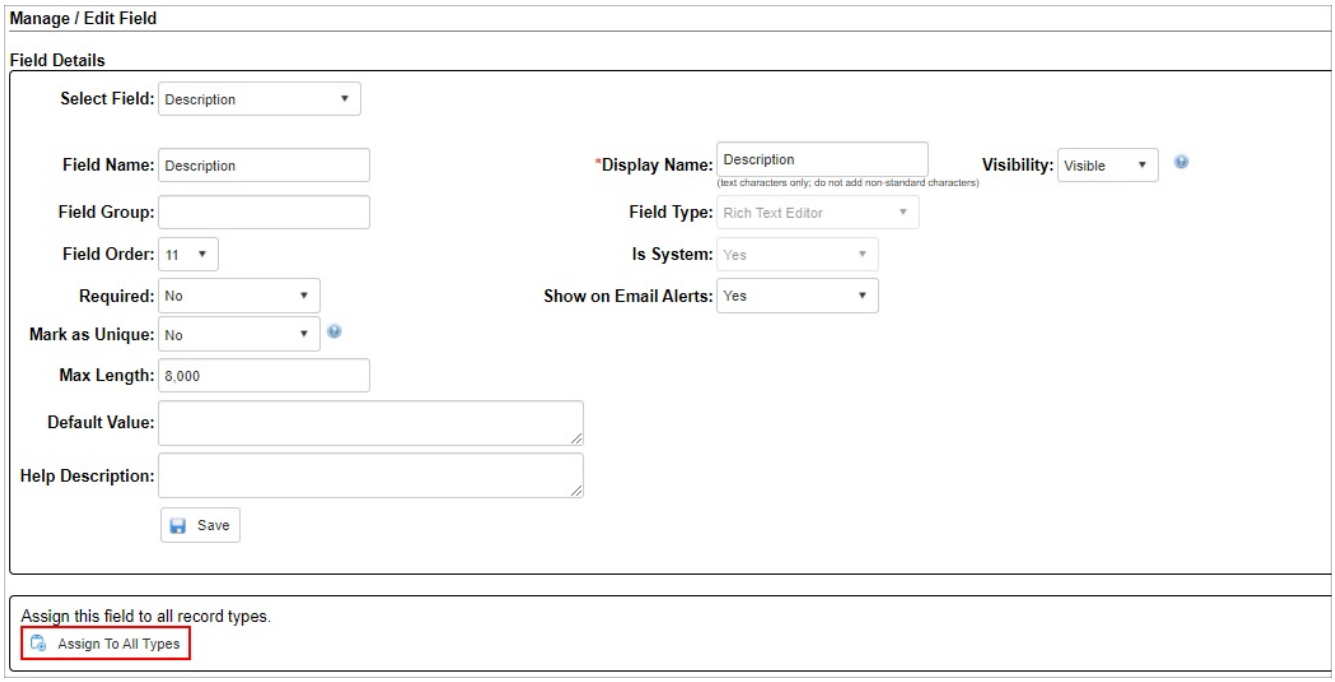
Assign Field To All Types

Fields may be assigned to all types so users do not have to repeat the same process multiple times. To do this, navigate to the **Field Manager** and select the **Table** where the field resides. Click **Edit** next to the desired field which is to be applied to all contract types.



Then, click **Assign To All Types**.

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Schema Explorer

Schema Explorer

Field Manager: Schema Explorer

Contract Insight supports the ability to view the Schema of the system. A user must be a system administrator to view the **Schema Explorer** screen.

Schema Explorer

A schema is a road map of how everything is connected in the system.

Navigate to **Manage/Setup** > **Field Manager** > **Schema Explorer**

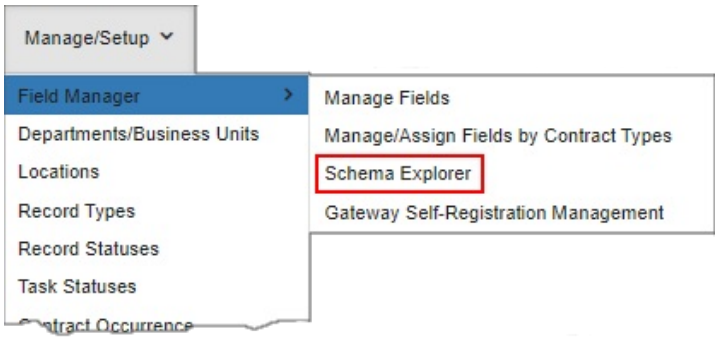


Table Selection

Once a table is selected from the **Select Area/Table** drop down, the information for the table will appear in the box below such as the **Table Database (DB) Name**, **Table Display Name**, and the **Primary Key of the table**.



Select Area/Table: This drop-down field includes all the Tables from the system. When a table is selected from the drop-down, all the information for that table appears below (Ex: Contract Details).

Table DB Name: This shows what the table name is on the back end (Database) of the system (Ex. tblContracts).

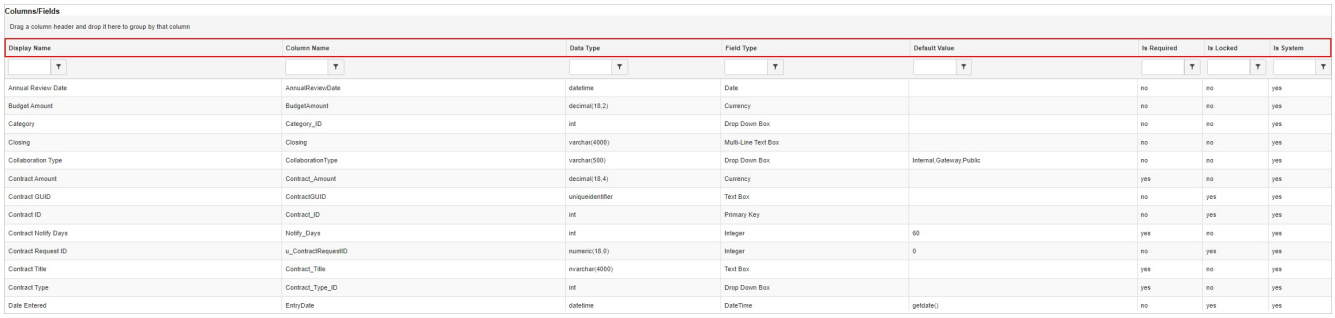
Table Display Name: This shows what the **Display Name** is for this table in the system (Ex: Contract Details).

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Primary Key Field: A **primary key** is a unique identifier for a table. The primary key for each table within the system is the **ID** field. For example, the primary key for the Contract Details table will be the **Contract ID**; for the Request table the primary key will be the **RequestID** field.

Columns/Fields

The Columns/Fields sub-table on the **Schema Explorer** shows all the fields associated with the selected table (Contract Details). The employee/user will see the **Display Names**, **Column Names**, **Data Type**, **Field Type**, **Default Value**, **Is Required**, **Is Locked**, **Is System**, **Is Identity**.


Columns/Fields

Drag a column header and drop it here to group by that column

Display Name	Column Name	Data Type	Field Type	Default Value	Is Required	Is Locked	Is System
Annual Review Date	AnnualReviewDate	datetime	Date		no	no	yes
Budget Amount	BudgetAmount	decimal(18,2)	Currency		no	no	yes
Category	Category_ID	int	Drop Down Box		no	no	yes
Closing	Closing	varchar(4000)	Multi-Line Text Box		no	no	yes
Collaboration Type	CollaborationType	varchar(500)	Drop Down Box	Internal,Gateway,Public	no	no	yes
Contract Amount	Contract_Amount	decimal(18,4)	Currency		yes	no	yes
Contract GUID	ContractGUID	uniqueidentifier	Text Box		no	yes	yes
Contract ID	Contract_ID	int	Primary Key		no	yes	yes
Contract Notify Days	Notify_Days	int	Integer	60	yes	no	yes
Contract Request ID	u_ContractRequestID	numeric(18,0)	Integer	0	no	yes	yes
Contract Title	Contract_Title	nvarchar(4000)	Text Box		yes	no	yes
Contract Type	Contract_Type_ID	int	Drop Down Box		yes	no	yes
Date Entered	EntryDate	datetime	DateTime	getdate()	no	yes	yes

Display Name: This column shows the **Display Name** for each field in the table selected in **Select Area/Table**.

Column Name: This column shows the **Name** of the field on the DB side.

Data Type: This column shows the **Data Types** from the DB side of the system.

Field Type: This column shows the **Field Types** of the fields. (Checkbox, Currency, Date, DateTime, Decimal, Decimal 4, Drop Down Box, Integer, Multi-Line Text Box, Multi-Line List Box, Password, Slider, Text Box, and Rich Text Editor).

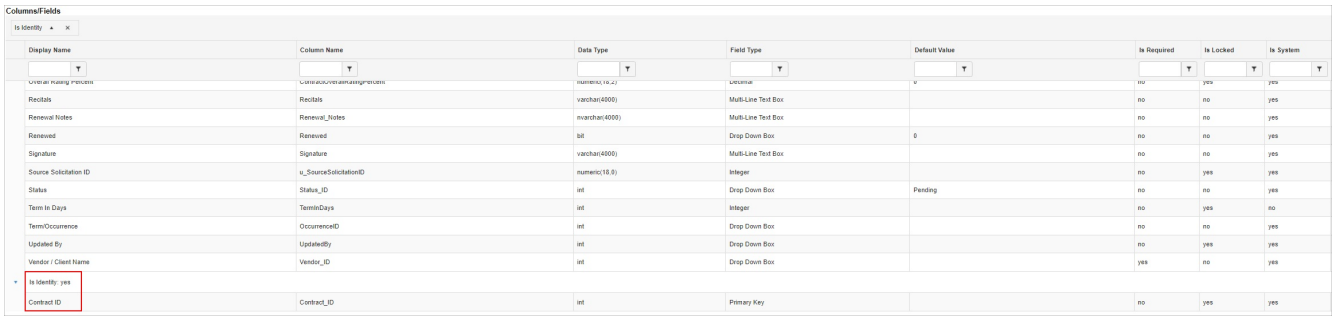
Default Value: This column will show the default value that was added to the **Default Value** text box on the **Manage/Edit Field** screen for a field.

Is Required: This column will show you if the field is a required field.

Is Locked: This column lets employee/user if the field is locked

Is System: This column shows if the field is system (Yes) or user (No) defined field.

Is Identity: This column shows you what field in the table has the **Primary Key**. For example, the **Contract ID** field has Yes in that column.


Columns/Fields

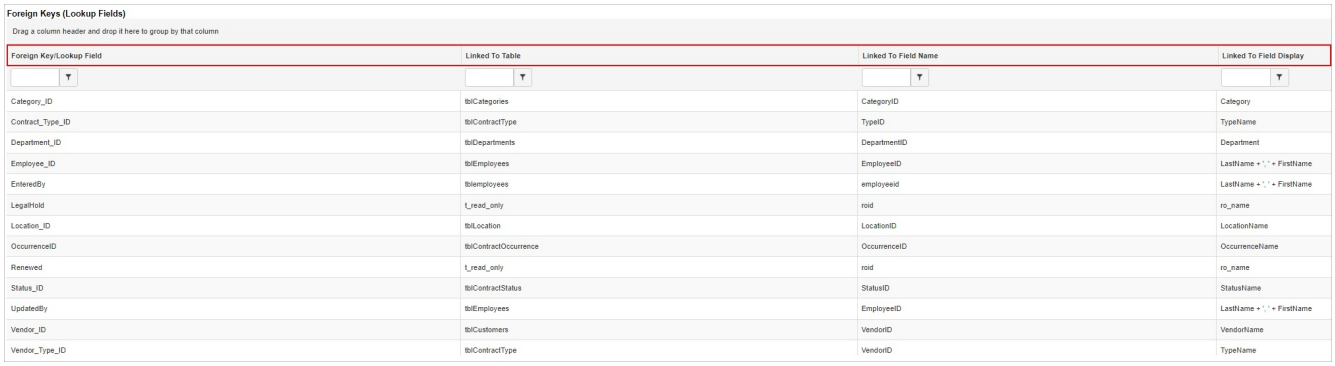
Is Identity

Display Name	Column Name	Data Type	Field Type	Default Value	Is Required	Is Locked	Is System
Recitals	Recitals	varchar(4000)	Multi-Line Text Box		no	no	yes
Renewal Notes	Renewal_Notes	nvarchar(4000)	Multi-Line Text Box		no	no	yes
Renewed	Renewed	bit	Drop Down Box	0	no	no	yes
Signature	Signature	varchar(4000)	Multi-Line Text Box		no	no	yes
Source Solicitation ID	u_SourceSolicitationID	numeric(18,0)	Integer		no	yes	yes
Status	Status_ID	int	Drop Down Box	Pending	no	no	yes
Term In Days	TermInDays	int	Integer		no	yes	no
Term/Occurrence	OccurrenceID	int	Drop Down Box		no	no	yes
Updated By	UpdatedBy	int	Drop Down Box		no	yes	yes
Vendor / Client Name	Vendor_ID	int	Drop Down Box		yes	no	yes
Is Identity: yes							
Contract ID	Contract_ID	int	Primary Key		no	yes	yes

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Foreign Keys (Lookup Fields):

A foreign key is a column or group of columns in a relational database table that provides a link between data in two tables. It acts as a cross-reference between tables because it references the primary key of another table, thereby establishing a link between them.



Foreign Keys (Lookup Fields)

Drag a column header and drop it here to group by that column

Foreign Key/Lookup Field	Linked To Table	Linked To Field Name	Linked To Field Display
Category_ID	tblCategories	CategoryID	Category
Contract_Type_ID	tblContractType	TypeID	TypeName
Department_ID	tblDepartments	DepartmentID	Department
Employee_ID	tblEmployees	EmployeeID	LastName + ', ' + FirstName
EnteredBy	tblemployees	employeeid	LastName + ', ' + FirstName
LegalHold	t_read_only	roid	ro_name
Location_ID	tblLocation	LocationID	LocationName
OccurrenceID	tblContractOccurrence	OccurrenceID	OccurrenceName
Renewed	t_read_only	roid	ro_name
Status_ID	tblContractStatus	StatusID	StatusName
UpdatedBy	tblEmployees	EmployeeID	LastName + ', ' + FirstName
Vendor_ID	tblCustomers	VendorID	VendorName
Vendor_Type_ID	tblContractType	VendorID	TypeName

Foreign Key/Lookup Field: This column shows the foreign keys that are associated with this table (Ex. Contract Details).

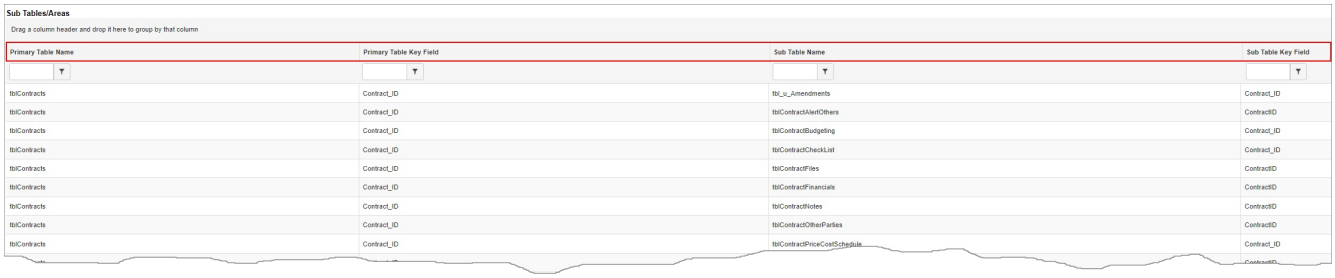
Linked to Table: This column shows the table that this fields are primary keys for and what links them to this table.

Linked to Field Name: This column shows the field names of those foreign keys.

Linked to Field Display: This column shows the linked field name displays for these foreign keys.

Sub Tables/Areas:

This sub-table on the Schema Explorer page will show all the sub-tables that are associated with this table (Ex. Contract Details).



Sub Tables/Areas

Drag a column header and drop it here to group by that column

Primary Table Name	Primary Table Key Field	Sub Table Name	Sub Table Key Field
tblContracts	Contract_ID	tbl_u_Amendments	Contract_ID
tblContracts	Contract_ID	tblContractAlertOthers	ContractID
tblContracts	Contract_ID	tblContractBudgeting	Contract_ID
tblContracts	Contract_ID	tblContractCheckList	Contract_ID
tblContracts	Contract_ID	tblContractFiles	ContractID
tblContracts	Contract_ID	tblContractFinancials	ContractID
tblContracts	Contract_ID	tblContractNotes	ContractID
tblContracts	Contract_ID	tblContractOtherParties	ContractID
tblContracts	Contract_ID	tblContractPriceCostSchedule	Contract_ID

Primary Table Name: This column shows the primary table name for this sub-table.

Primary Table Key Field: This column shows the primary key that's associated with table (Contract Details).

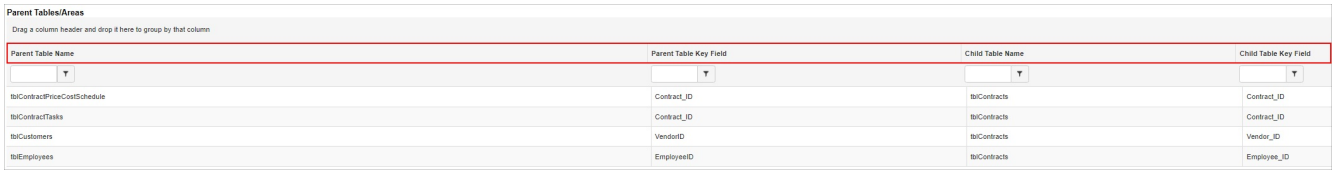
Sub Table Name: This column shows the sub table name that's on the DB side of the system.

Sub Table Key Field: This column shows the primary key that's associated with that sub-table.

Parent Tables/Areas:

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This sub-table on the Schema Explorer page shows the Parent Tables, Parent Table Key Field, Child Table Name, and Child Table Key Field.



Parent Tables/Areas

Drag a column header and drop it here to group by that column

Parent Table Name	Parent Table Key Field	Child Table Name	Child Table Key Field
tblContractPriceCostSchedule	Contract_ID	tblContracts	Contract_ID
tblContractTasks	Contract_ID	tblContracts	Contract_ID
tblCustomers	VendorID	tblContracts	Vendor_ID
tblEmployees	EmployeeID	tblContracts	Employee_ID

Parent Table Name: This column shows the parent tables that are associated with this table.

Parent Table Key Field: This column shows the primary key for each field.

Child Table Name: This column shows the child table of the primary table.

Child Table Key Field: This column shows the primary key to the child table.

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Sub-Tables on Add Screen

Sub-Tables on Add Screen

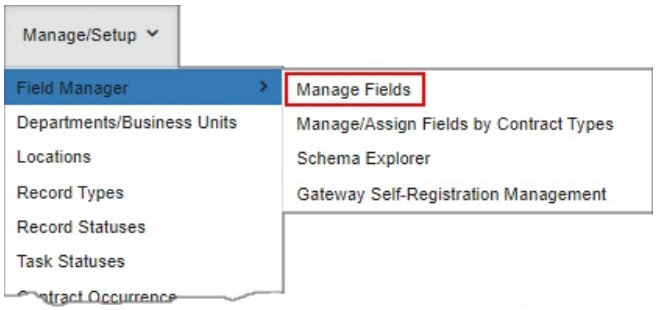
Field Manager: Assign Sub-Tables to Record Add Screens

Contract Insight allows Application Administrators to assign sub-tables to an add screen. This allows users to enter sub-table data before navigating to the details screen.

Assign Fields by Contract Type

1. Log into the system as an Application Administrator.

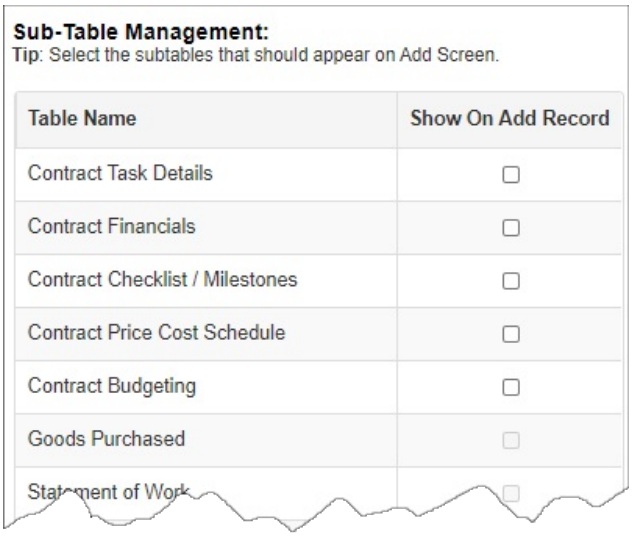
2. Select **Manage Fields** from the **Manage/Setup** menu



3. The **Manage Fields** screen appears.

4. From the **Select a Table To Manage** menu, select the table for which the sub-table(s) are to appear on the add screen for that record type.

5. Scroll down the page to the **Sub-Table Management** area.



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6. Mark the tick-box for each table to appear on the add screen for records of that type.

Note: Sub-tables with rules applied to them cannot be selected and appear grey.

Note: Sub-tables selected for an add screen cannot have rules/conditions applied to them after their selection here.

Note: Not all out-of-the-box sub-tables can be selected for inclusion on the add screen.

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Field Manager History

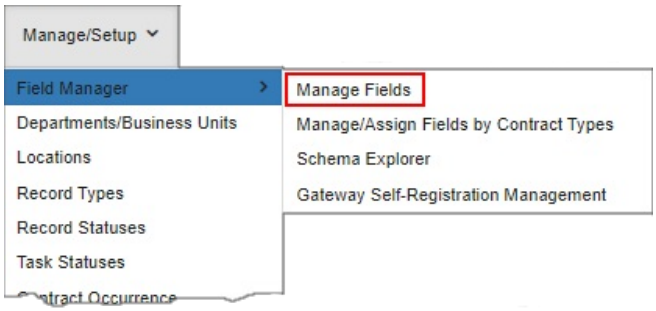
Field Manager History

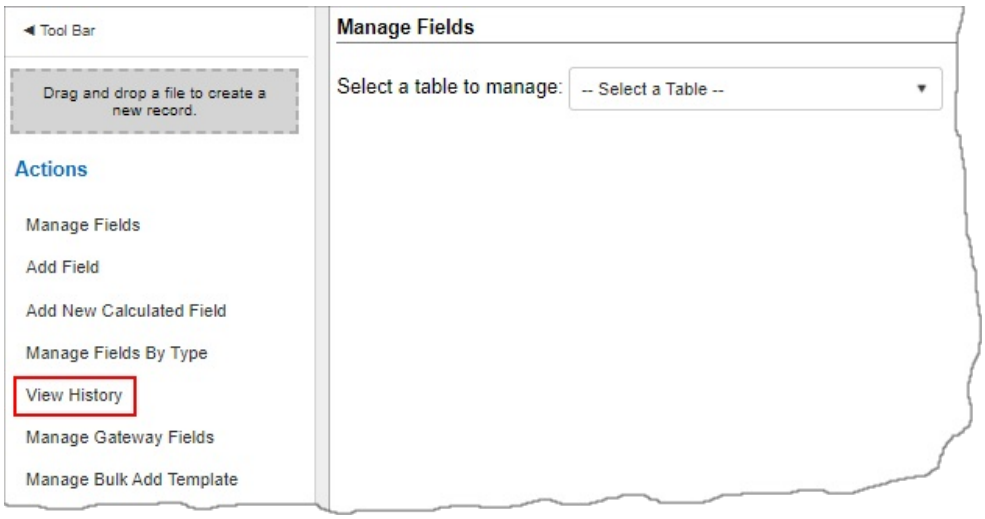
Field Manager: Field History

Contract Insight offers system administrators the ability to view the full history of fields via the Field Manager.

Create a User-defined Field

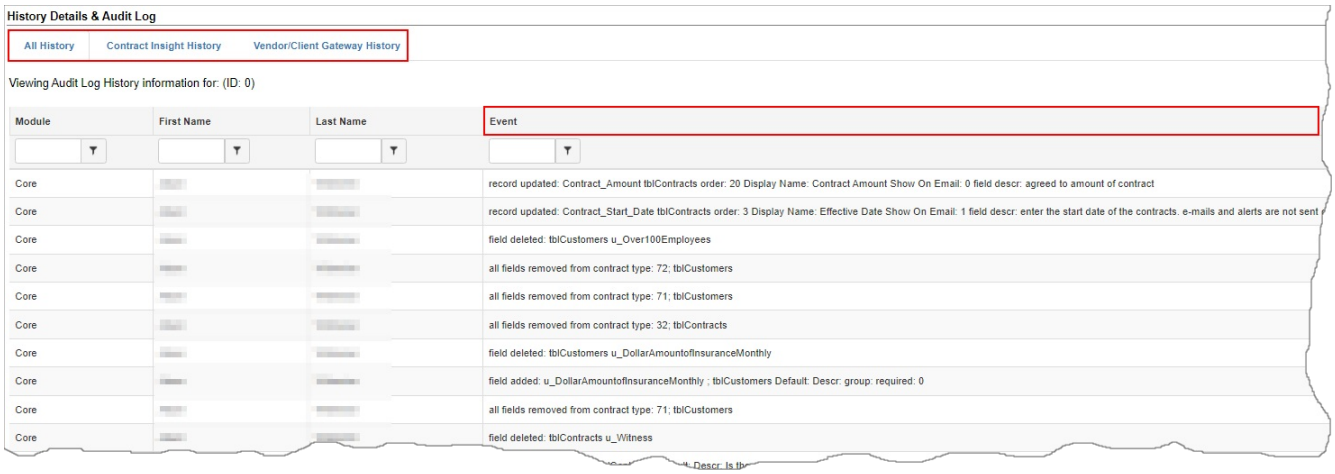
1. Navigate to the Field Manager via **Manage/Setup** - **Field Manager** - **Manage Fields**.
2. On the side menu, click **View History**





3. The **History Details & Audit Log** page displays. Navigate to view all history, just fields for the Core application, or just fields for the Vendor/Client Gateway via the tabs at the top of the page.

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4. View the details of each change in the **Event** column.

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Duplicate Check

Duplicate Check

Field Manager: Duplicate Check/ Unique Value Fields

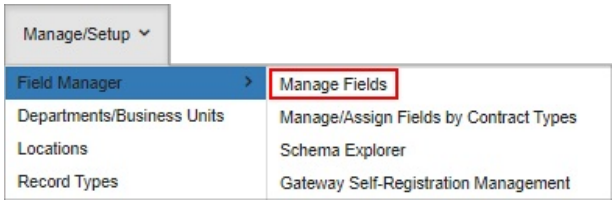
When creating a new record, fields marked as unique are checked. If values match with existing records, the application prompts the user accordingly. This function helps to avoid unnecessary duplication of records.

Setting a field as unique at the field level

1. Click **Manage/Setup**

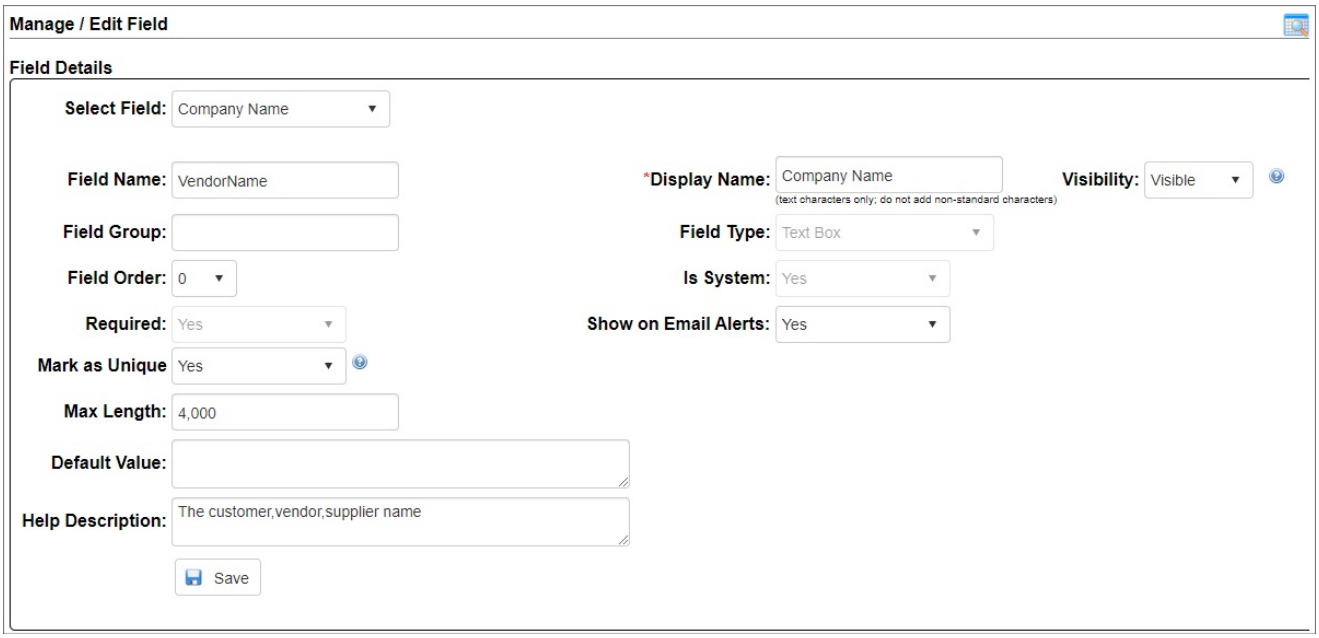
2. Click **Field Manager**

3. Click **Manage Fields**



4. Select the desired field (edit)

5.Set **Mark as Unique** to Yes.



6. Click **Save**.

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Configure Fields to Mark as Unique by Type

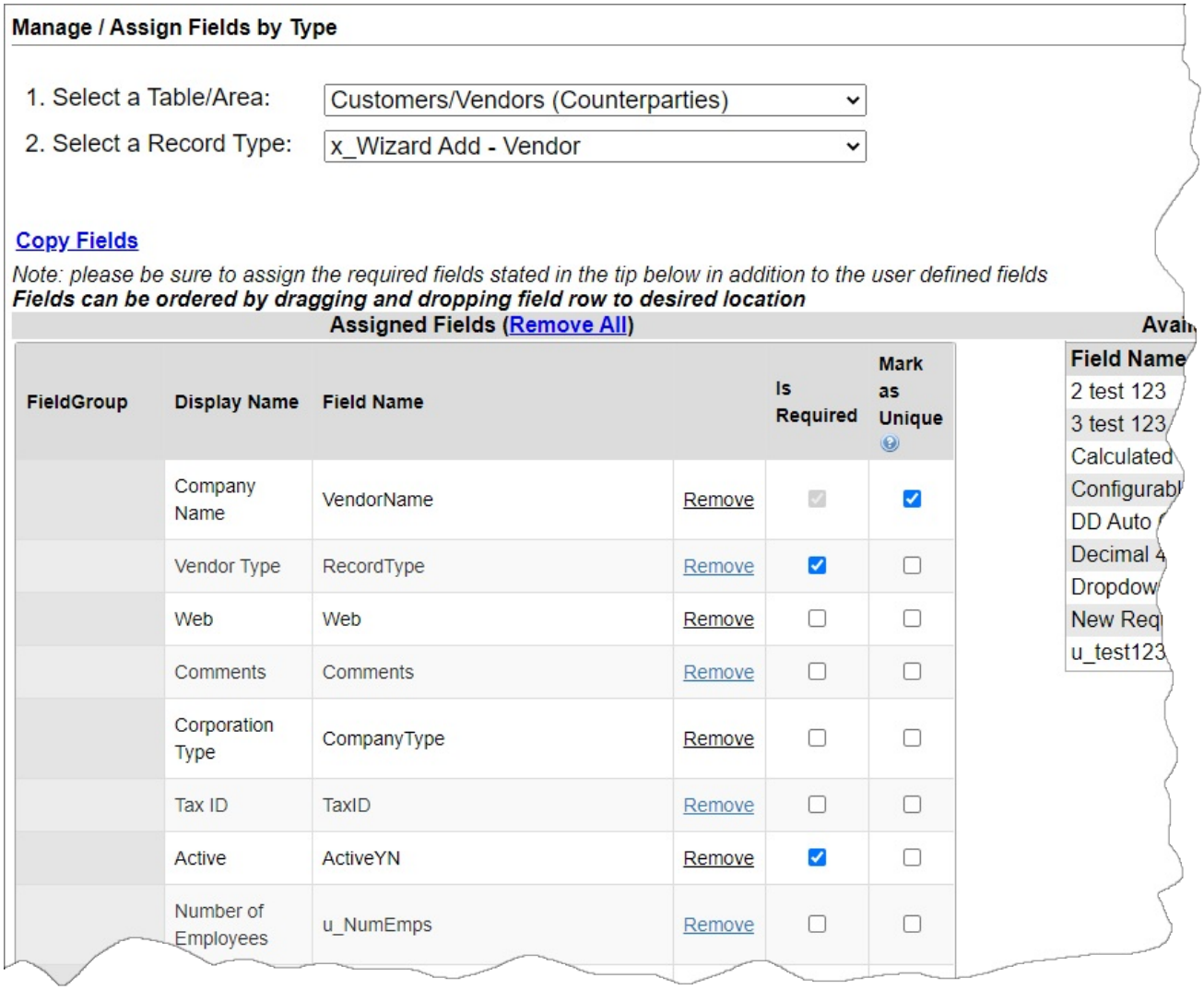
1. Click **Manage/Setup**

2. Click **Field Manager**

3. Click **Fields by Type**

4. Select **Type**

5. Configure fields to mark as a unique value



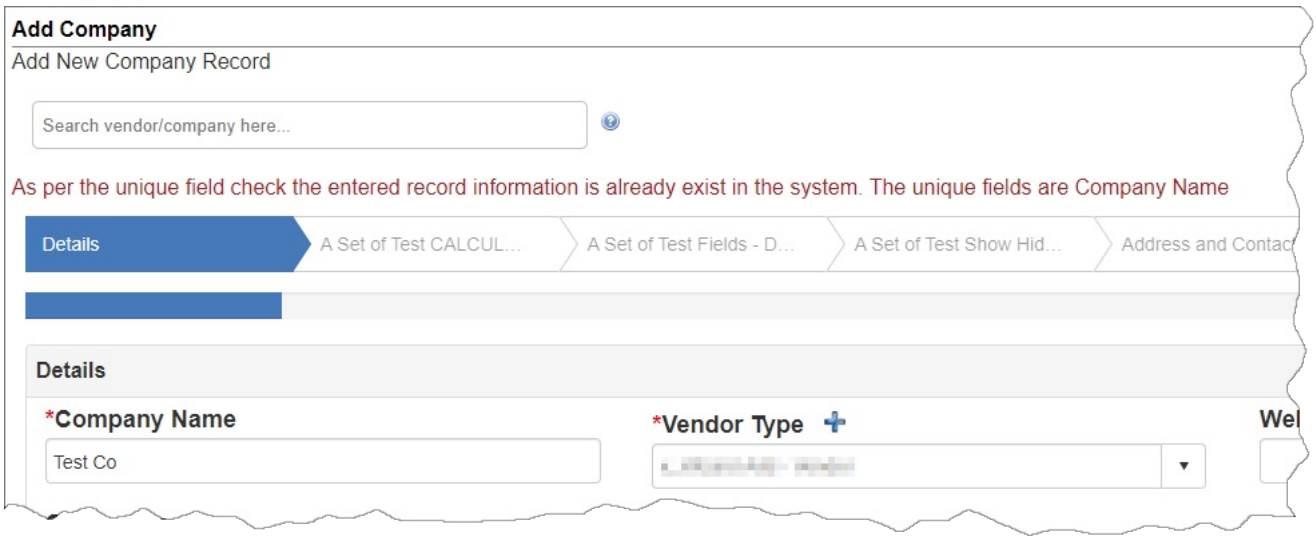
From **Manage/Assign Fields by Type**, select or deselect the mark as unique option as desired

Note: Items are marked or not marked as set by default in the **Add New Field** page **or Manage/Edit Field** page for that field

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Duplicate Check In Action

If an exact match is found, the following warning message will display.



Enter a unique value and continue.

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01. License Types Overview

01. License Types Overview

Employee and User Management: License Types Overview

Employee/User Licensing deals with user license roles, access, and privileges for your organization's User Universe. CobbleStone Systems offers organizations flexibility when making their decision on Contract Insight Enterprise Edition user licensing by providing a choice of **Legacy** licensing and **Enhanced** Licensing. For those licensing models, CobbleStone Software provides two types of licenses for each: **Named** or **Concurrent**.

Enhanced Licensing

Enhanced Licensing provides organizations with the option of four choices of Licence Levels. For each License Level, there are a set of base permissions that are available to be assigned to each Employee/User of the application. Please keep in mind that Permissions will need to be assigned to all License Type users.

1. **Admin** (Application Administrators) License Level:

Under the "Admin" License Level, there are two types of Admin users included:

License Level = **Admin**, **Sys Admin** = Yes/True
-Admins who are **Sys Admins** do not need to have Permissions assigned to them, as these users will have "All Access" privileges and cannot be restricted from any areas within Contract Insight

License Level = **Admin**, **Sys Admin** = No/False
-Admins who are not **Sys Admins** do need to have Permissions assigned to them, as they will not have all access privileges. However, Admin users will have more Permissions available for them to be assigned.

2. **Super** License Level:

Super users will have more Permissions available than the **Standard** or **ReadOnly** License Level users, but will not have as many Permissions available to be assigned to them as **Admin** License Level users.

3. **Standard** License Level:

Standard users are users that can do only a bit more than **ReadOnly** users, but will have fewer Permissions available to be assigned to them than **Super** users.

4. **Read Only** License Level:

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Read Only users are users who are only allowed to log-in and view Contract Record that you have assigned permissions to them to view, but will not be allowed to edit or manage any records or data in the Contract Insight application.

Note: see the linked "CobbleStone - User Permissions for Contract Insight Software.pdf" document for more details on available permissions.

Legacy Licensing

Legacy Licensing provides organizations with a set number of user Licenses that can either be **Admin** (meaning All Access) or **ReadOnly** (meaning the user does not have all access and needs Permissions assigned to him or her. For each non-Admin user, all Permissions will be available to be assigned to the user, which allows System Administrators to customize and create their own security permission groups for user access based on any/all permissions.

Concurrent User Licenses

CobbleStone Software offers Concurrent user licenses for Contract Insight Enterprise Edition and defines concurrent users as the total number of users accessing the Licensed Software within a specified Server Session time-out period. Concurrent user Licenses can be purchased for Enhanced or Legacy Licensing (see above).

With Concurrent user licenses, an unlimited number of Employees can be set as **Active** (allowed to log-in) per assigned License that was purchased, whether Enhanced or Legacy Licensing was purchased. However, only the number of Licenses purchased can be logged into Contract Insight simultaneously. For Example:

For Legacy Licensing, if your organization purchased 10 Concurrent User Licenses, then you can have as many Employees set to be active users, but only 10 users are allowed to be signed in at any given time.

For Enhanced Licensing, if your organization purchased 3 Concurrent Admin, 2 Concurrent Super, 4 Concurrent Standard, and 6 Concurrent ReadOnly licenses, then you can still have as many Employees set to **Active** (allowed to log-in) for each License Type, but only 3 Employees with Admin License Levels, 3 Employees with Super License Levels, 4 Employees with Standard License Levels, and 6 Employees with Read Only License Levels can be logged in to the Contract Insight application at any given time.

Named User Licenses

CobbleStone Systems offers Named user licenses for Contract Insight Enterprise Edition and defines named users as individuals authorized by the Application Administrator to use the system which is installed on a single server or multiple servers regardless of whether or not the individual is actively using the system at any given time. To specify an Employee as a user, they must be set as Active users (**Active** = Yes/True) be allowed to log-in. The Named user licenses allow a 1:1 ratio, meaning only one Employee is allowed to be **Active** for each License purchased, whether your organization has purchased Enhanced or Legacy Licensing.

Named User Licenses are dedicated to a specific named individual user and cannot be shared with any other potential users without first deactivating the assigned named user.

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02. Adding an Employee/User

02. Adding an Employee/User

Employee/User Management: Adding an Employee/User

To add new employees / users you must have administrative permissions.

Note: An employee becomes a user when the employee entered is assigned a **username** and **password**, given the appropriate permissions, and the **ActiveYN** option is set to Yes.

To add a new user, select **Add Employee** from the **Employees** menu:



The **Add Employee: Select License Type** screen opens.

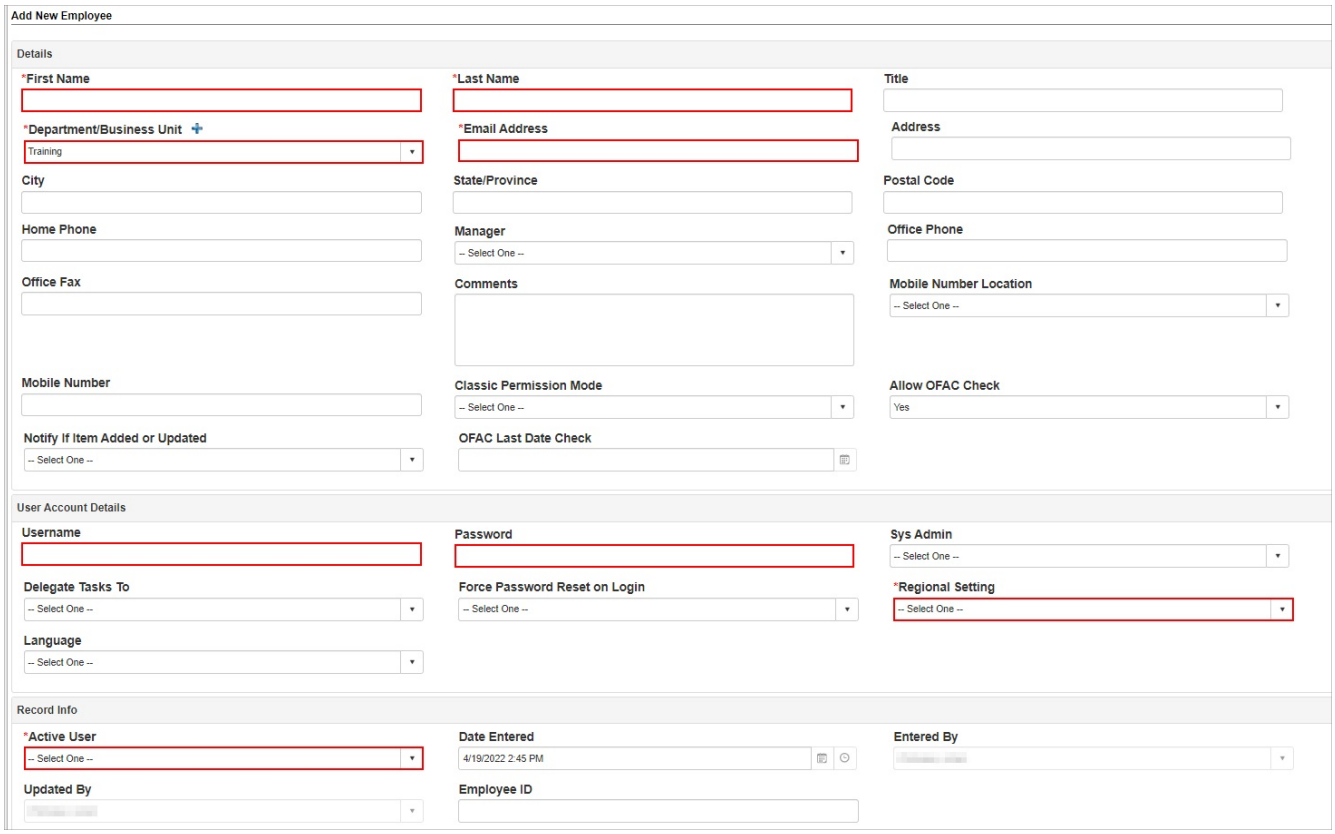
From the **Add Employee for License Type** drop down menu, select the License Type to which the new user will be assigned. When the license type is chosen, the specific license type's information (number of sessions allowed, etc.) are displayed in the information box below.



Click the **Continue Employee Add** button to open the **Add Employee** screen.

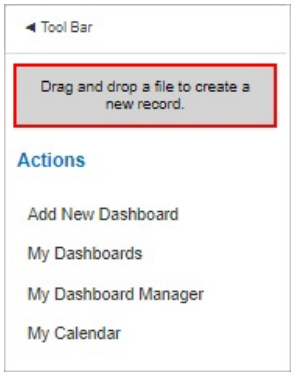
Enter the new employee/user information. Click **Continue** to save the information.

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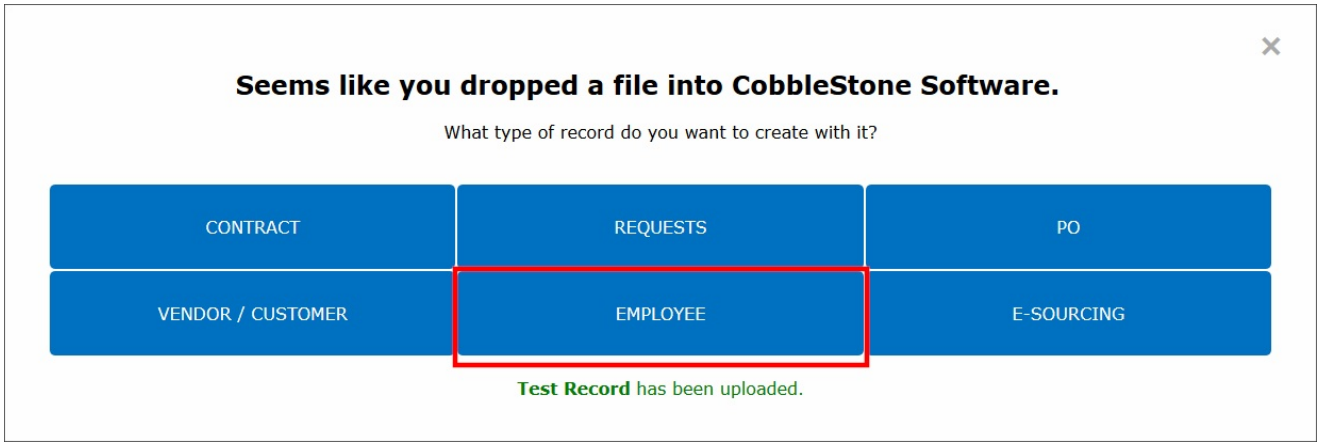
The **Regional Setting** field on the **Add Employee** screen allows System Administrators to specify a user's localization. This specification is usually used by international organizations with Employees/users outside of the United States. By specifying a user's Regional Setting, it will set the date/time format to the region selected for that user when he/she logs into the Contract Insight application and counts non-working days that have been assigned to that region. For more information on non-working days, please see Workflow Management.

You are also able to add an employee record from a file on any page with the grey Drag and Drop box in the side menu by dragging and dropping a file on the screen.



You will then be prompted to choose what record type to create from the file. For an employee/user you will want to click the **Employee** button.

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Afterwards you will be brought to a screen to review the file and enter all record metadata as necessary.

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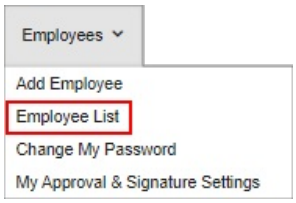
03. Editing Employees/Users

03. Editing Employees/Users

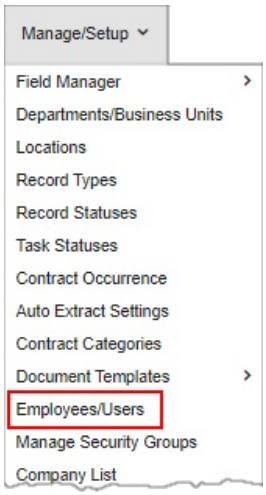
Employee/User Management: Editing Employees/Users

To edit an employee/user, you must have administrative permissions.

From the **Employees** tab, select **Employee List**.



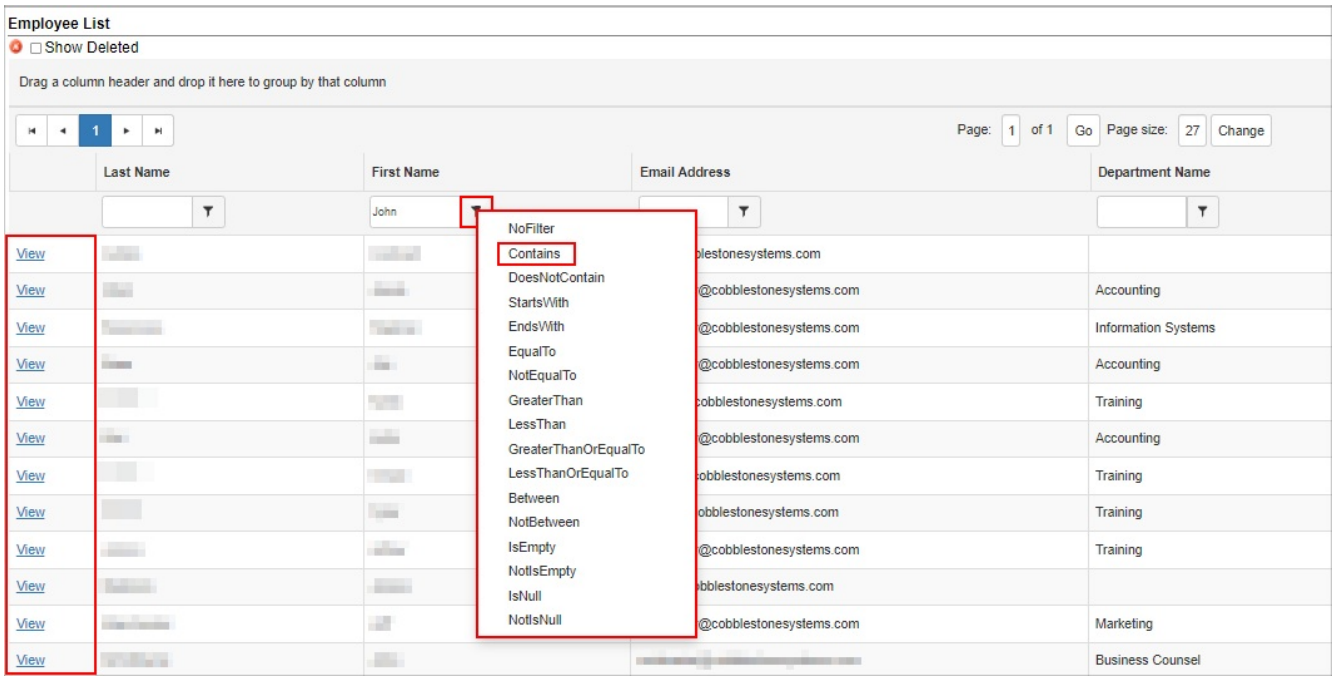
Alternatively, the employee list can be accessed from the **Manage/Setup** Menu select **Employees/Users**.



Either opens the **Employee List**. From the Employee List, users view the list of Employees/Users in the system. To view the details of the employee, click **View** for the line item to be accessed.

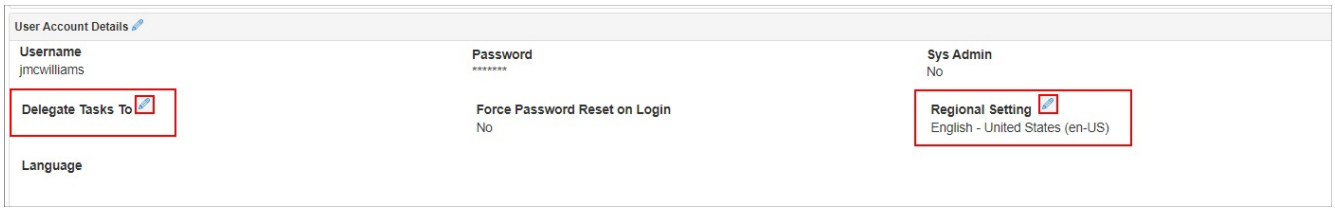
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Note: By clicking a **column header** (Last Name, First Name, Email, etc.), the list can be sorted. Clicking the column headers once will sort it in ascending order. Clicking the header a second time will sort it in descending order. Clicking the header a third time will return the list to it's original state. Additionally, fields below the column headers can be used to refine your search. By typing in letters, numbers, etc. you can click the **filter** icon and refine the search using the options available in the drop down list.



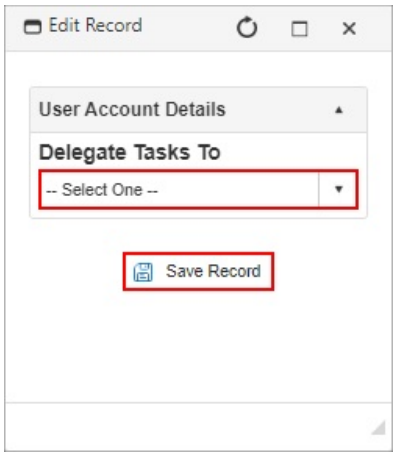
The **Employee Details** screen for the employee/user to be edited displays.

Click the **Pencil icon** for the employee details line item to edit.



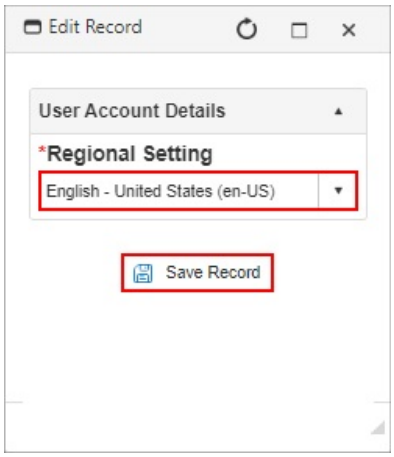
The **Edit Field** pop-up window displays. Enter any necessary/desired changes to the field and click **Save Changes** to confirm the changes or **Cancel Changes** to abort the process.

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In addition to managing the details of an employee/user, the **Employee Details** screen also allows you to attach supporting files/documents.

Optionally, set the **Regional Setting** for the individual employee. The Regional Setting controls the date/time settings that displayed for the user and drive non-working days for tasks. For more information on non-working days, please see the **Workflow Management** section of this guide.

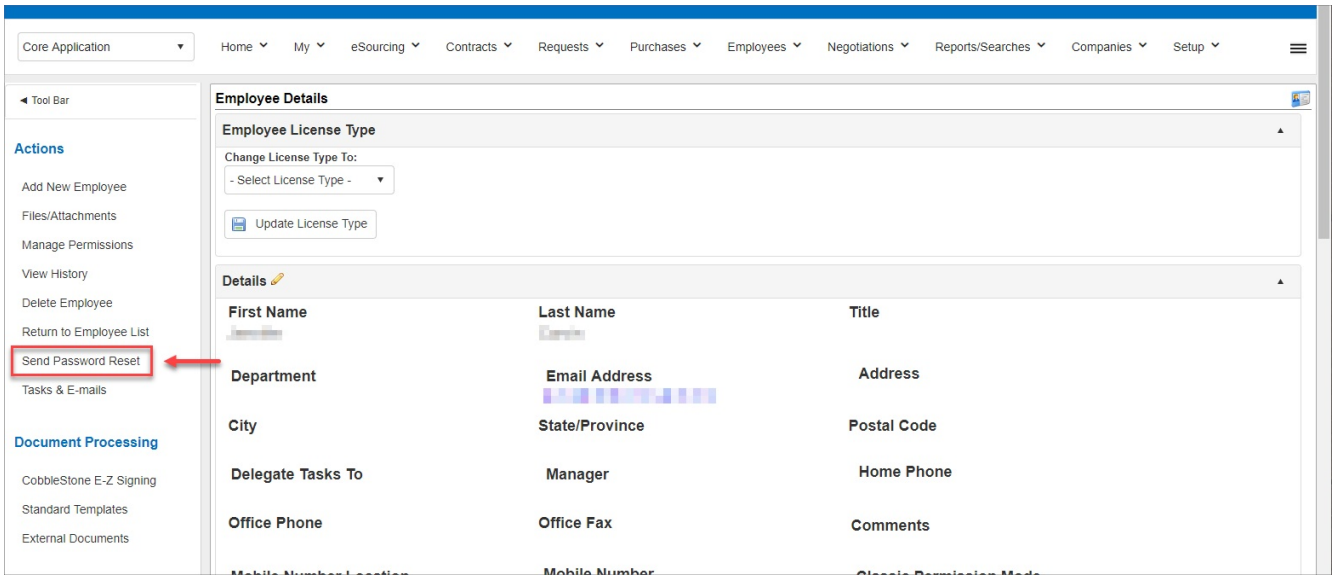


Reset Password

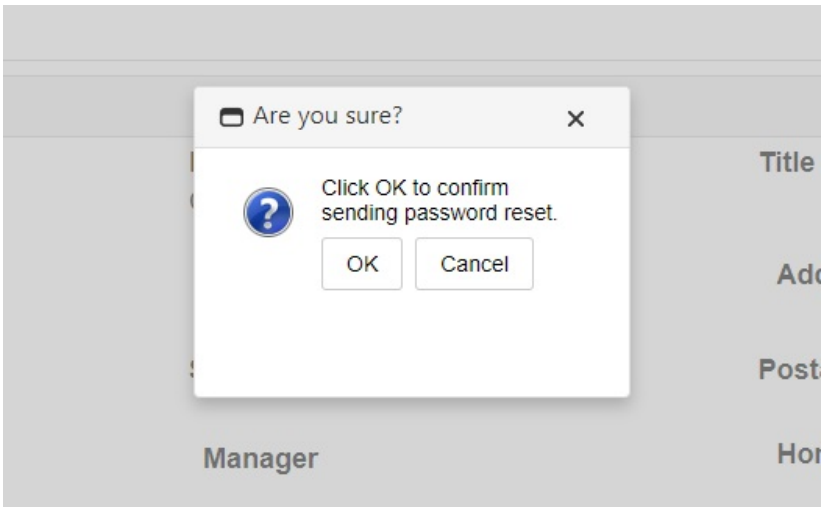
If an employee/user forgets their password, a System Admin can send them a Password Reset email.

1. On the Employee Details screen, click **Send Password Reset** in the side menu.

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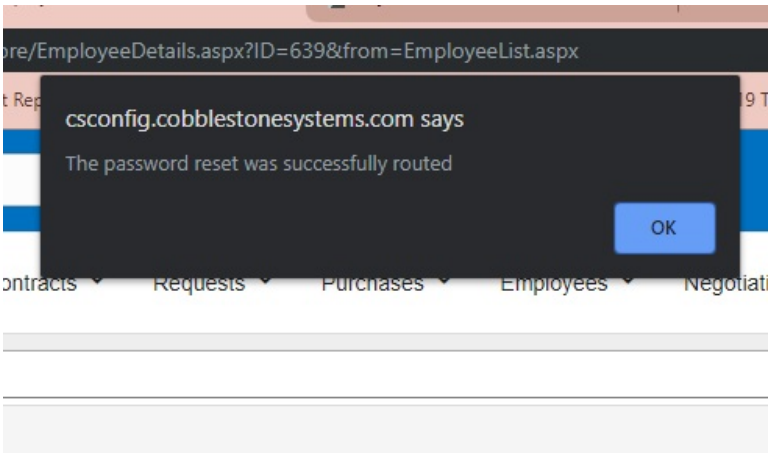


2. **Confirm** you would like to send the password reset email to the user.



3. Success confirmation will pop up when finished.

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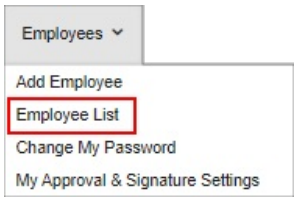
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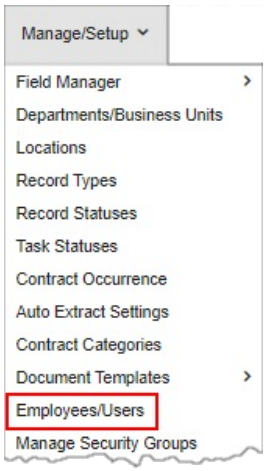
04. Employee List

04. Employee List

Employee/User Management: The Employee List

To view the list of Employees/Users in your system, navigate to **Employees** > **Employee List** or navigate to **Manage/Setup** > **Employees/Users**.





The **Employee List** screen displays. On it, the list of Employees/Users in your system are shown. To view the details of an employee, click **View** for the employee line item.

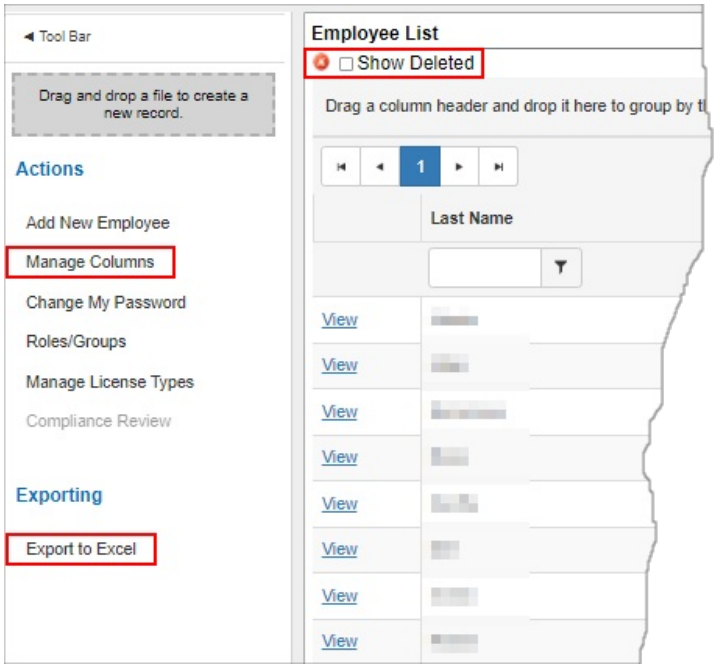
Sorting and Filtering Employee List

1. By clicking on the column headers (Last Name, First Name, Email, etc.) you will be able to sort the list. Clicking the column headers once sorts the list in ascending order. Clicking the header a second time sorts the list in descending order. Clicking the header a third time returns the list to its original sort order.

2. Use the fields below the column headers to refine your search. Enter a search string in the desired field and click the **Filter** icon. Indicate the method of filtering via options in the drop down list.

Employee List - Side Menu Options

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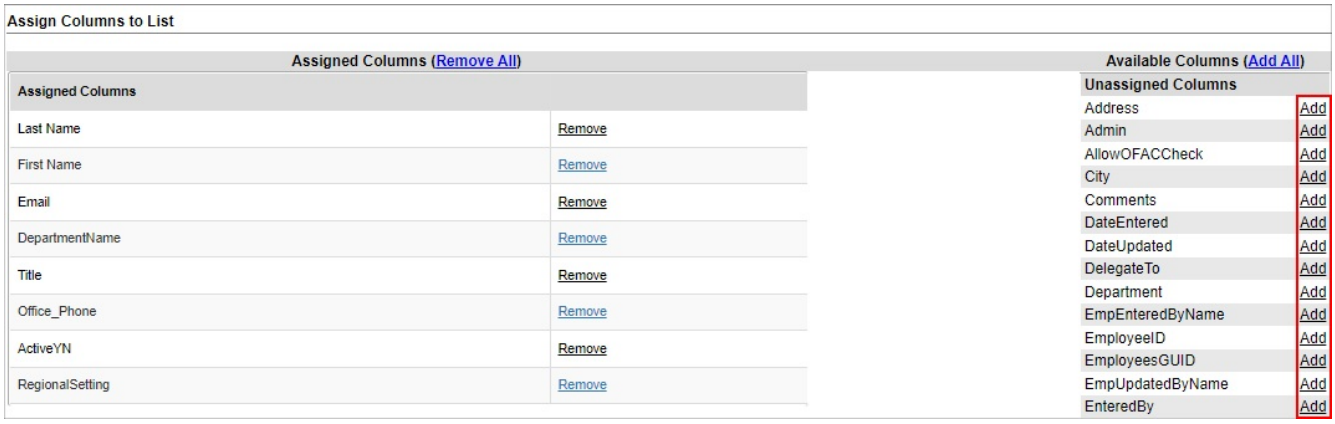


Manage Columns

Note: **Manage Columns** allows admin users to view additional columns of information available for the table selected.

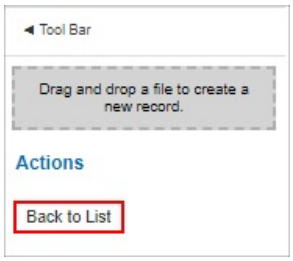
1. Click **Manage Columns**.

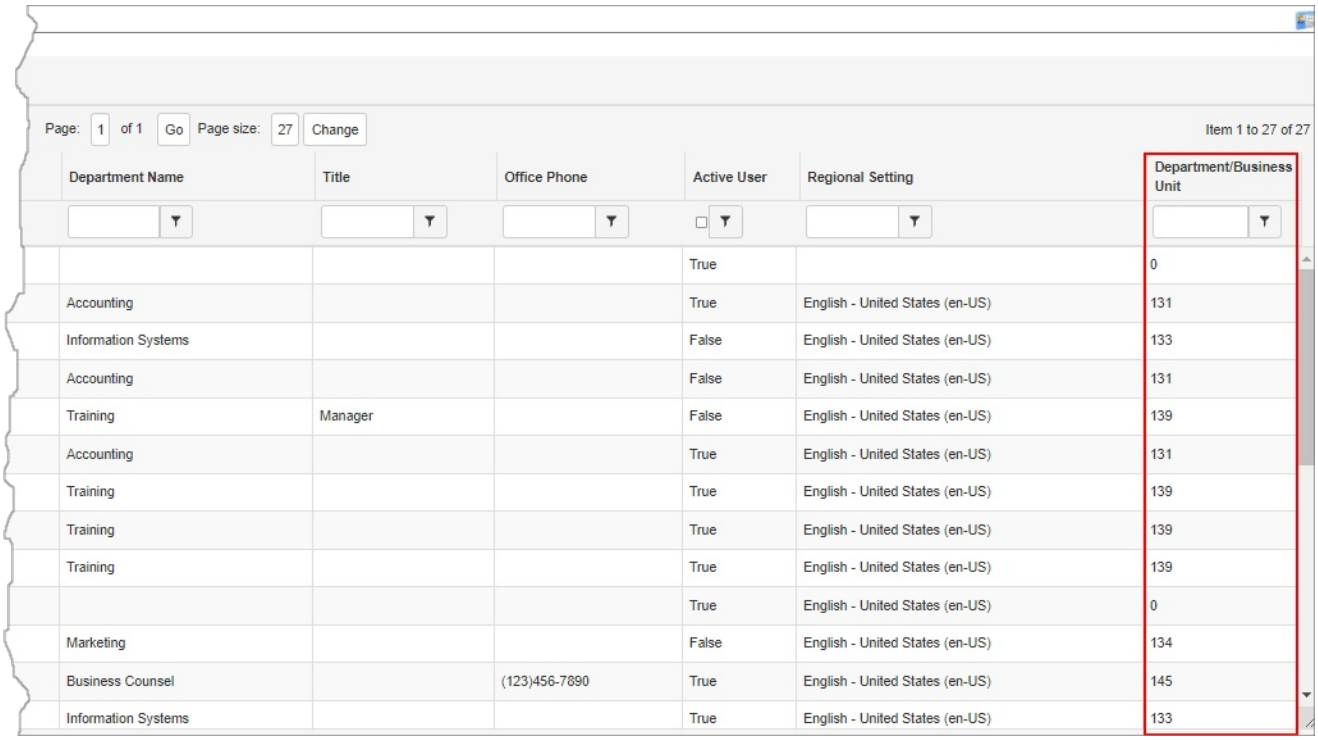
2. On the **Assign Columns to List** screen, from the **Available Columns** area, click the **Add** to add the column to add your selection(s) in the **Assigned Columns** area.



3. Once added, click **Back to List** on the side menu to view the column just added.

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Department Name	Title	Office Phone	Active User	Regional Setting	Department/Business Unit
			True		0
Accounting			True	English - United States (en-US)	131
Information Systems			False	English - United States (en-US)	133
Accounting			False	English - United States (en-US)	131
Training	Manager		False	English - United States (en-US)	139
Accounting			True	English - United States (en-US)	131
Training			True	English - United States (en-US)	139
Training			True	English - United States (en-US)	139
Training			True	English - United States (en-US)	139
			True	English - United States (en-US)	0
Marketing			False	English - United States (en-US)	134
Business Counsel		(123)456-7890	True	English - United States (en-US)	145
Information Systems			True	English - United States (en-US)	133

Exporting The Employee List

The Employee List can also be exported to Microsoft Excel, Microsoft Word or as a PDF. To view the list as a PDF, it is recommended to export to Microsoft Excel first then remove the **View** column (The **View** column has no functionality once exported). Once the **View** column is deleted, save the Excel spreadsheet as a PDF.

Deleted Employees

If employees have been deleted from your Employee/User list, view them by checking the **Show Deleted** box at the top of the **Employee List** screen.

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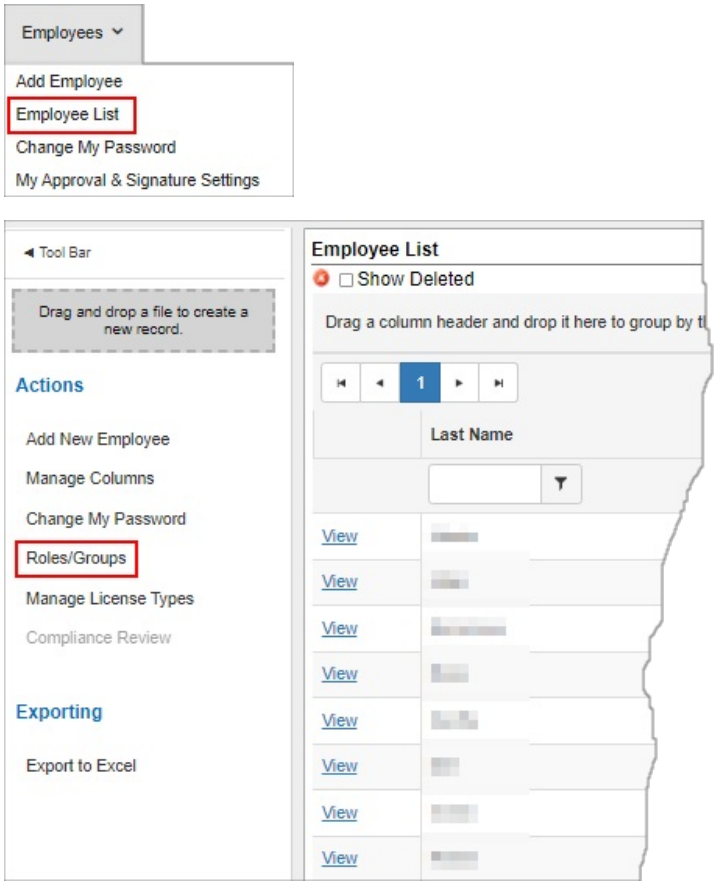
05. Employee Groups and Roles

05. Employee Groups & Roles

Employee/User Management: Employee Roles & Groups

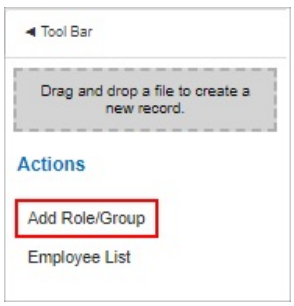
Contract Insight supports the ability to create, manage, and assign employees/users to Application Administrator-defined roles/groups. This allows Application Administrators to assign tasks (and workflows) to not only an individual employee/user, but also custom groups.

Create a New Employee Group1. Log into the system as an Application Administrator, and navigate to **Employees** > **Employee List**.



2. Click **Roles/Groups** on the side menu.

3. The **Employee Role/Group List** screen displays. Click **Add Role/Group** on the side menu.

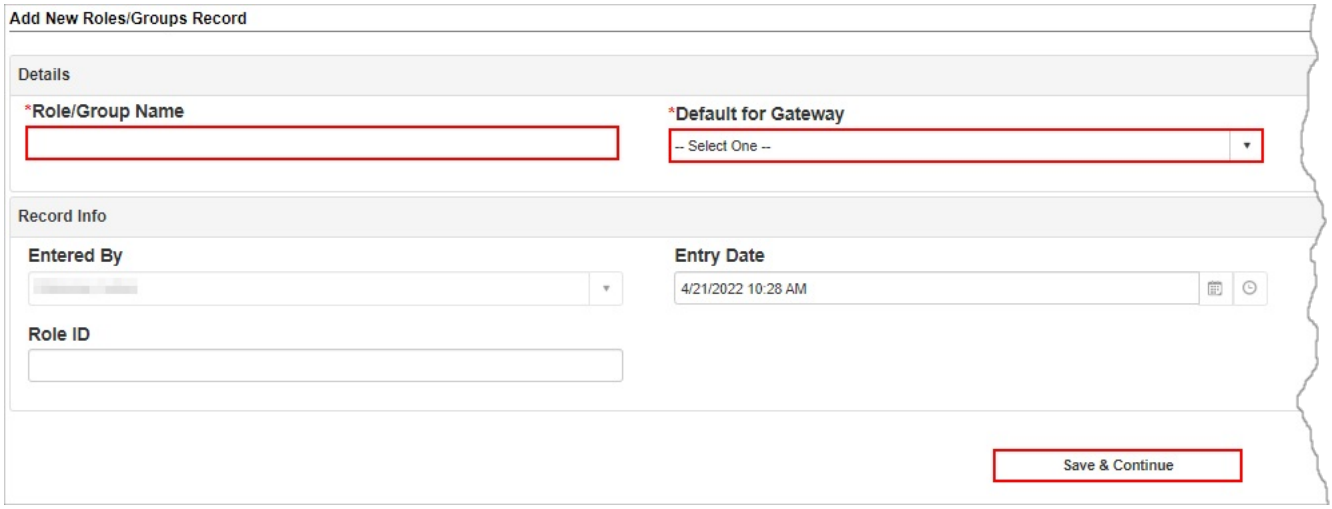


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5. Enter the **Name** for the Role/Group to create.

6. Select whether the new Role/Group should be the group notified for Contract Requests submitted on the **Vendor/Client Gateway** by selecting Yes or No for the **Default for Gateway** field.

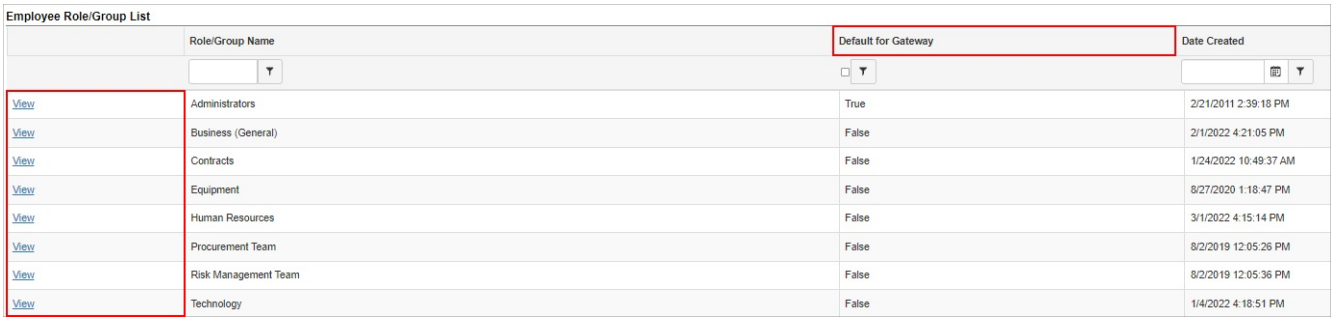
7. Click **Save**.



Note: The Default for Gateway field must be set to Yes for at least one Employee Group if you would like to allow Vendors/Clients to submit Contract Requests through the Gateway (see the Managing Access to the Gateway Wiki page for information about setting Configuration Settings to allow Vendors/Customers to submit Contract Requests through the Vendor/Client Gateway).

Assign Employees to an Employee Group

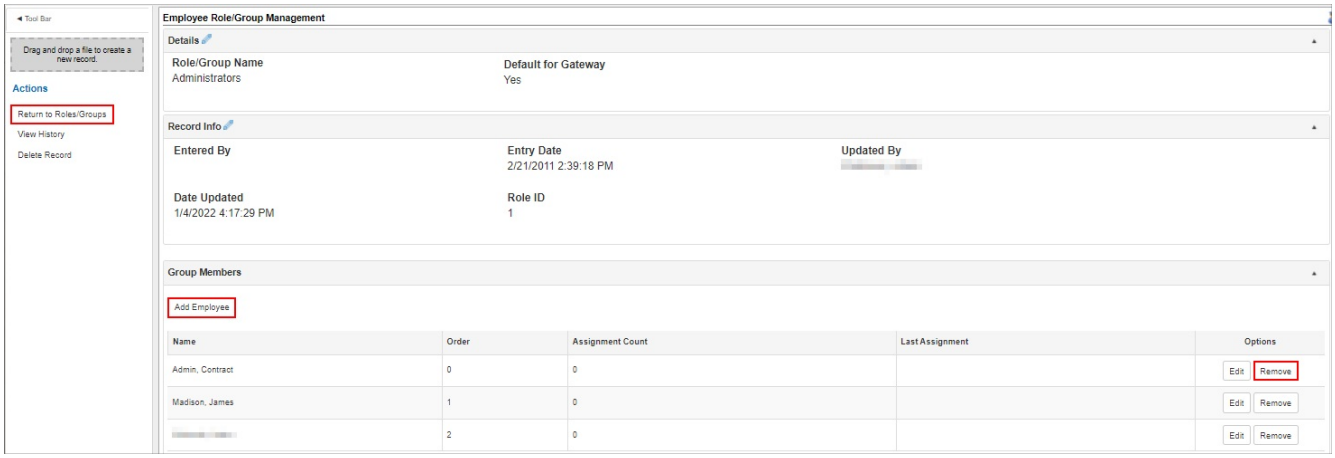
Navigate to the **Employee Group/Role List** screen. Click **View** for the group line item.



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3. The **Employee Role/Group Management Screen** displays. To add an employee, click **Add Employee**. This will open an area where employees can be added to the group. To remove an existing Group Member, click **Remove** under the *Options* area in their name line area.

4. To return to the prior screen, click **Return to Roles/Groups** on the side menu.



Delete an Employee Group

1. Navigate to the **Employee Role/Group Management Screen**.

2. Click **Delete Record** on the side menu.

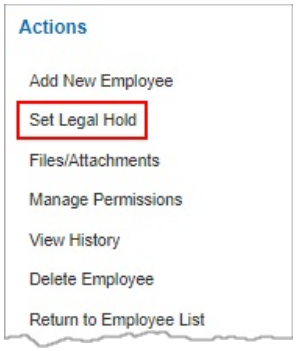
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Legal Hold

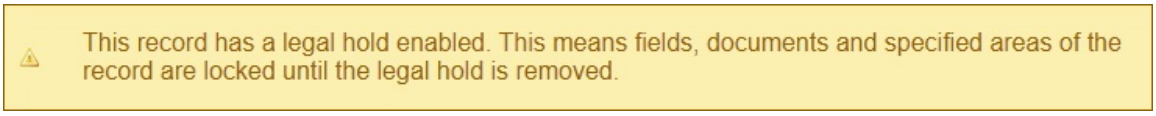
Legal Hold

Employee/User Details: Legal Hold

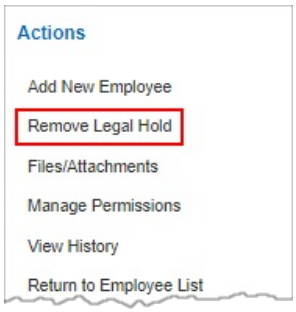
A System Admin User or any User with the **Setup: Manage Legal Holds** Permission assigned can manage an Employee Record's **Legal Hold** Status. To put a record on Legal Hold, click **Set Legal Hold** on the side menu, then confirm via the pop-up.



A banner, as seen below, appears along the top of the record. Fields are locked from editing and Attachments can no longer be added or deleted.



To remove the Legal Hold, click **Remove Legal Hold** on the side menu, then confirm via the pop-up.



To be able to attach new files while a record is on Legal Hold, there is a configuration setting for that. Navigate to:

Manage/Setup > Application Configuration > Config Settings

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Make sure **Security** is selected for the **Select Configuration Group** drop down. Go to **Group: Legal Hold** and adjust the **Disable File Uploads with Legal Hold** setting.

There is also a configuration setting regarding Document Authoring and Document Collaboration processes while on Legal Hold. (Document Collaboration being only relevant if using the Document Collaboration Add-On Module)

Select **Security** for **Select Configuration Group**. Modify **Document Collaboration with Legal Hold** as necessary.

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View Permissions by Record

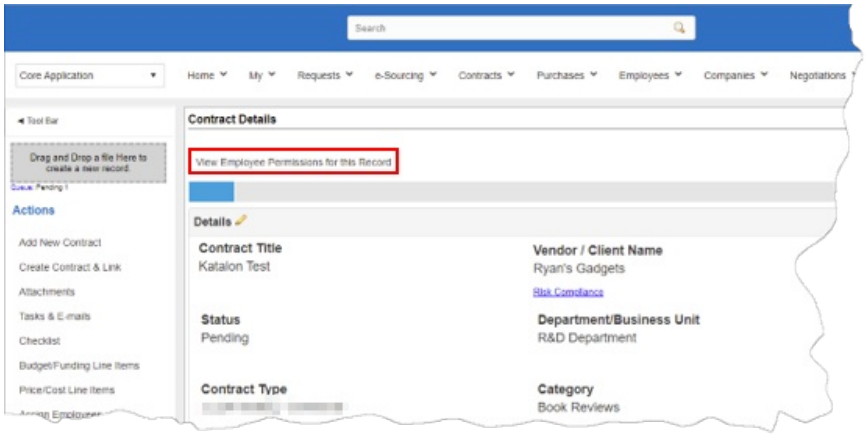
View Permissions by Record

View Permissions by Record

CobbleStone continues to allow expanded vision into employee permissions on a particular record within the system. If someone has view, edit, or delete access when they possibly should not, this helps system admins to have full transparency regarding those specific permissions.

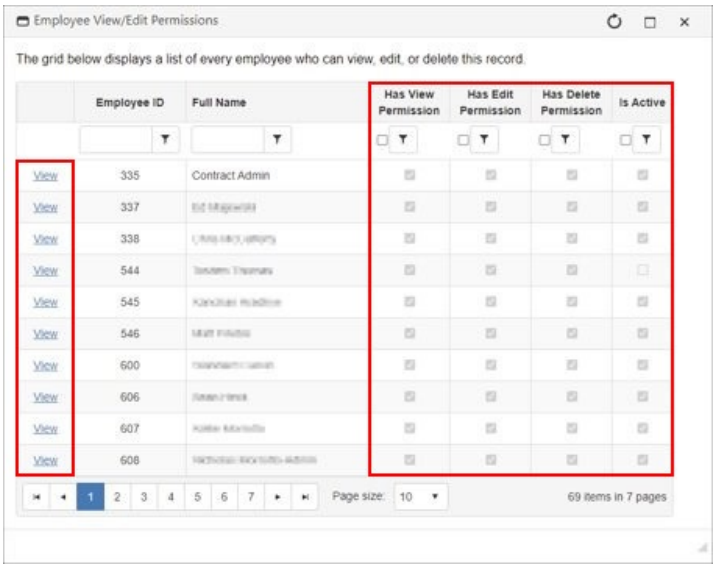
Navigate to the desired record, whether it be a request, contract, company/vendor, etc.

For this example, navigate to **Contracts**, **Find/Search Contracts**, and click the desired contract record.



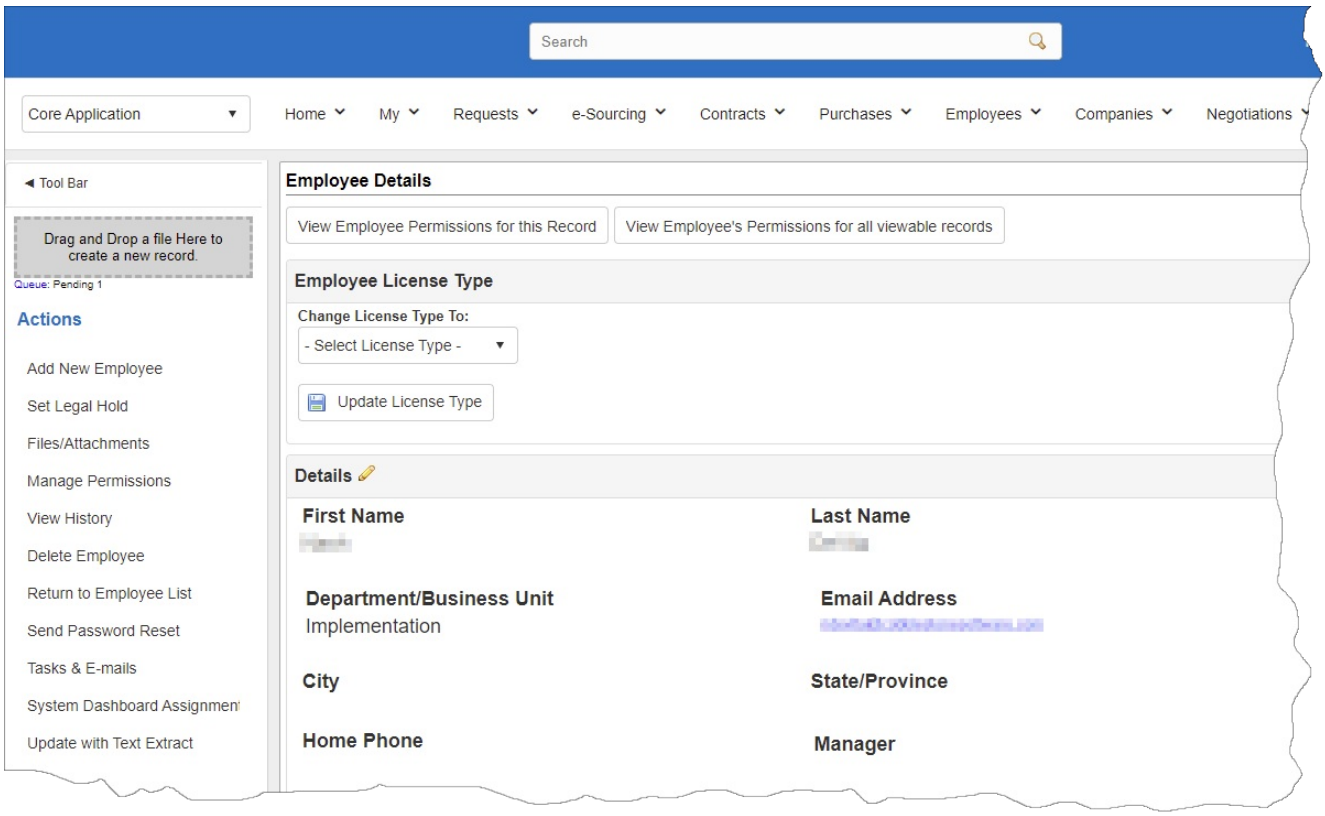
To view all employee permissions on this record, click **View Employee Permissions for this Record**

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When **View** is clicked, it reveals the employee details page immediately. From here, system admins have a few options available to them regarding this employee's permissions.

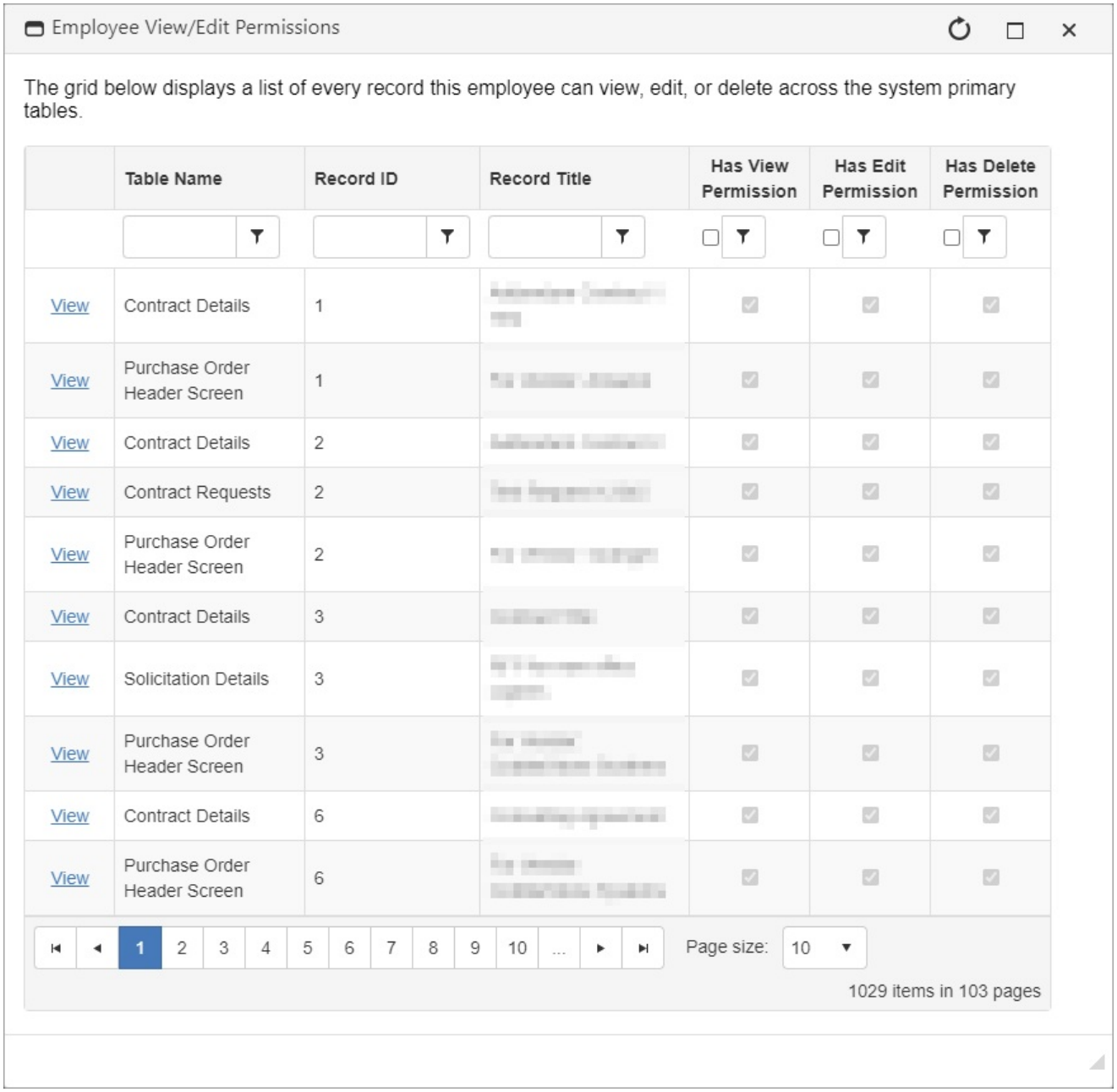
There are also other permissions, such as Has View Permission, Has Edit Permission, Has Delete Permission, and Is Active.



To view an employee's permission for this specific record, click **View Employee Permissions for this Record**.

To view an employee's permissions for all records available to them, click **View Employee Permissions for All Viewable Records**.

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01. Importing Companies

01. Importing Companies

This functionality has been replaced by the Data Import Manager.

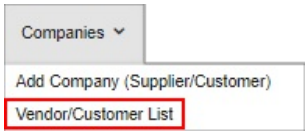
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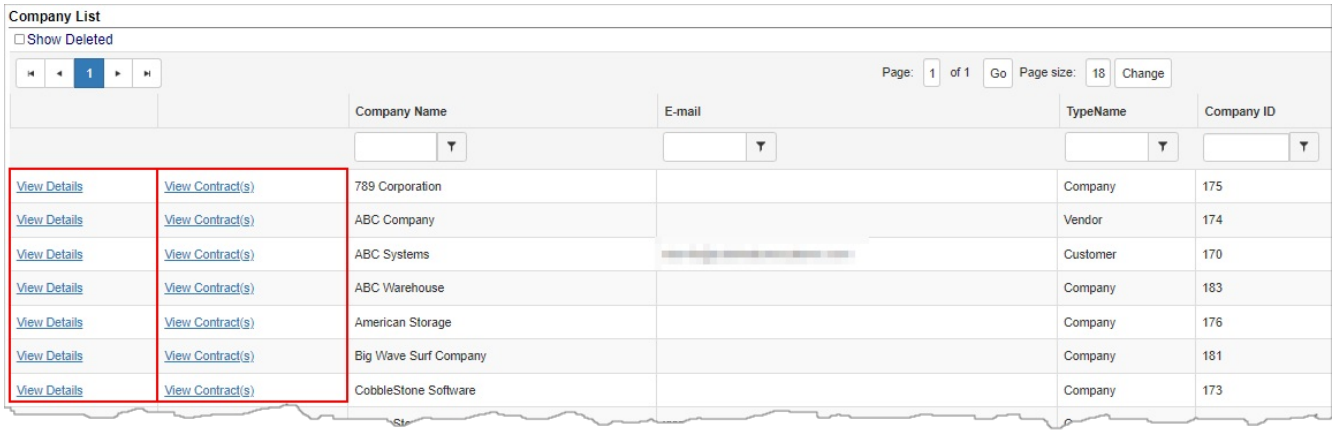
02. View and Edit Company/Vendor

02. View and Edit Company/Vendor

Vendor/Customer Management: View & Manage

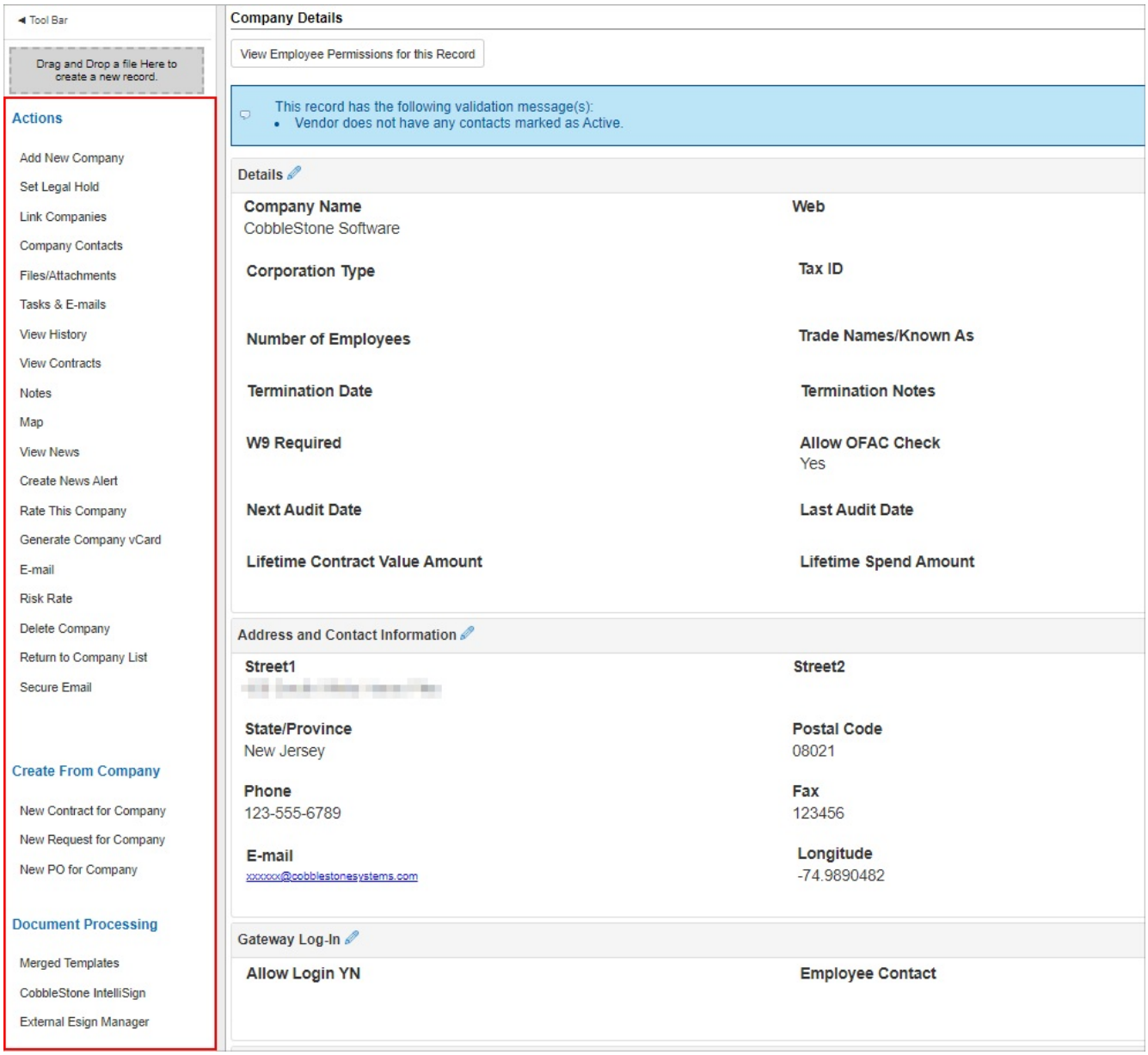
To view or edit Company/Vendor/Customer/Client/Supplier/Provider information, navigate to **Companies** > **Company List**. Each Vendor and Customer entered into the system display.





Click **View** for a name from the list to view the **Company Details** screen for that vendor/customer.

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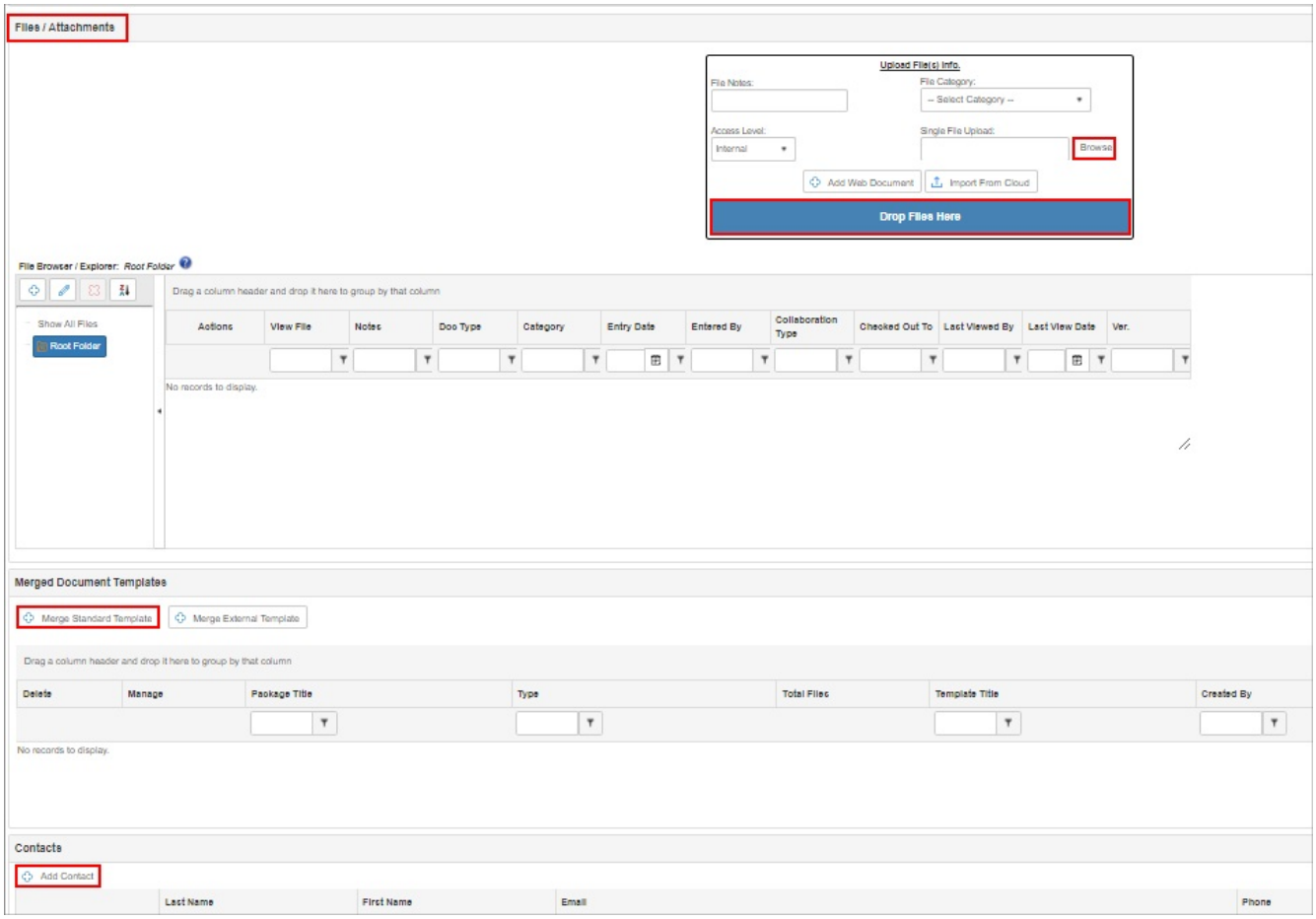
Note: the **Active** field will determine whether the Vendor/Company will be displayed in the Vendor/Company drop down menu on the **Add New Contract** field and for editing a Contract Record.

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Users with the proper privileges may edit each field by clicking the corresponding **Pencil Icon**.

To link companies together, select **Link Companies**.

To add attachments to a company, Click **Attachments** on the side menu. **Browse** to the file to attach and click **Save**.



Note: After attaching and saving an attachment, do not click your browser's refresh button. Doing so repeats the last action of attaching the file without warning or notification and a duplicate file will be attached.

Each Vendor/Customer has the capability of storing an unlimited number of thread-based notes.

Vendor notes can be added by any employee who has access to manage/edit Vendors/Customers.

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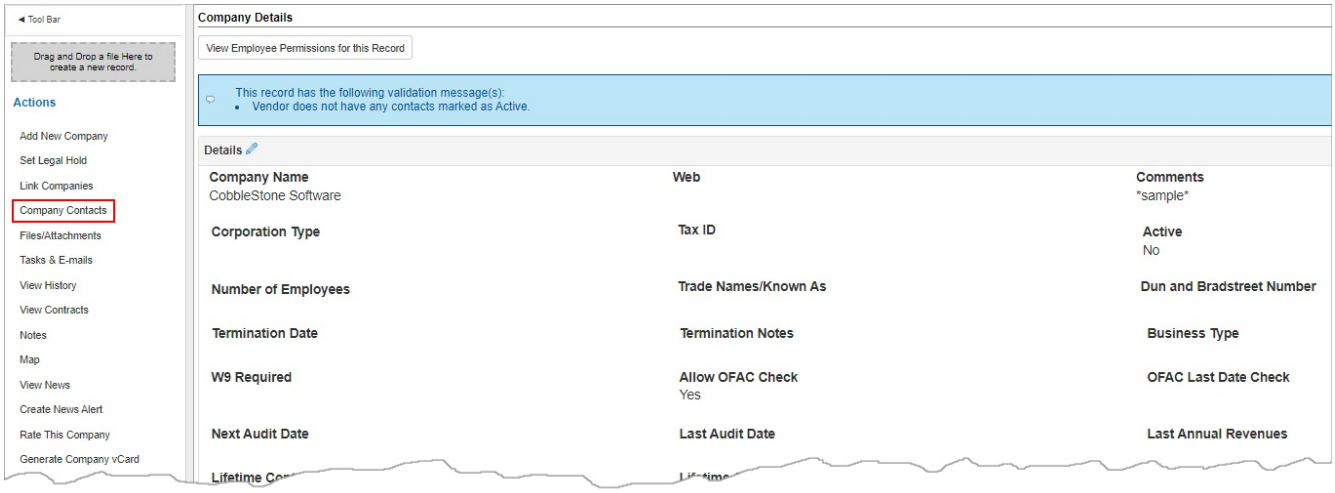
03. Add Contacts to Company/Vendor

03. Add Contacts to Company/Vendor

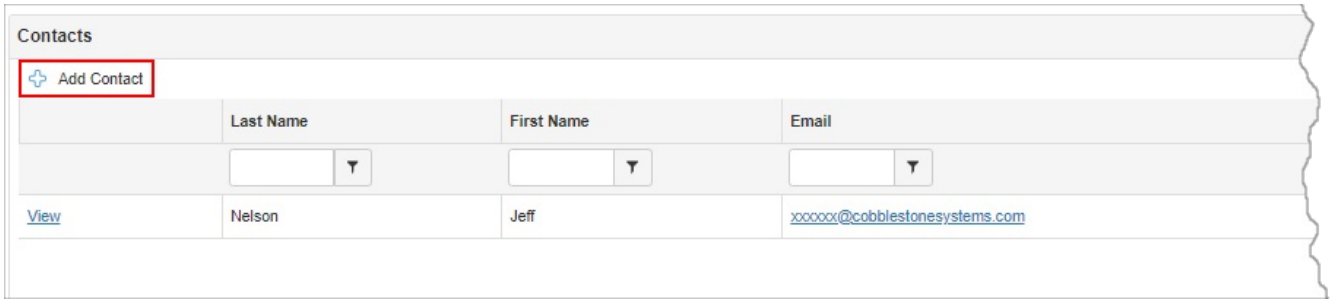
Vendor/Customer Management: Add Contacts to Company/Vendor

Contract Insight supports the ability to add unlimited contacts to Companies/Vendors/Customers/Clients/Providers/Suppliers.

To add contacts to Companies/Vendors/Customers/Clients/Providers/Suppliers, navigate to the **Company Details** screen and click **Company Contacts** from the Company Details screen.

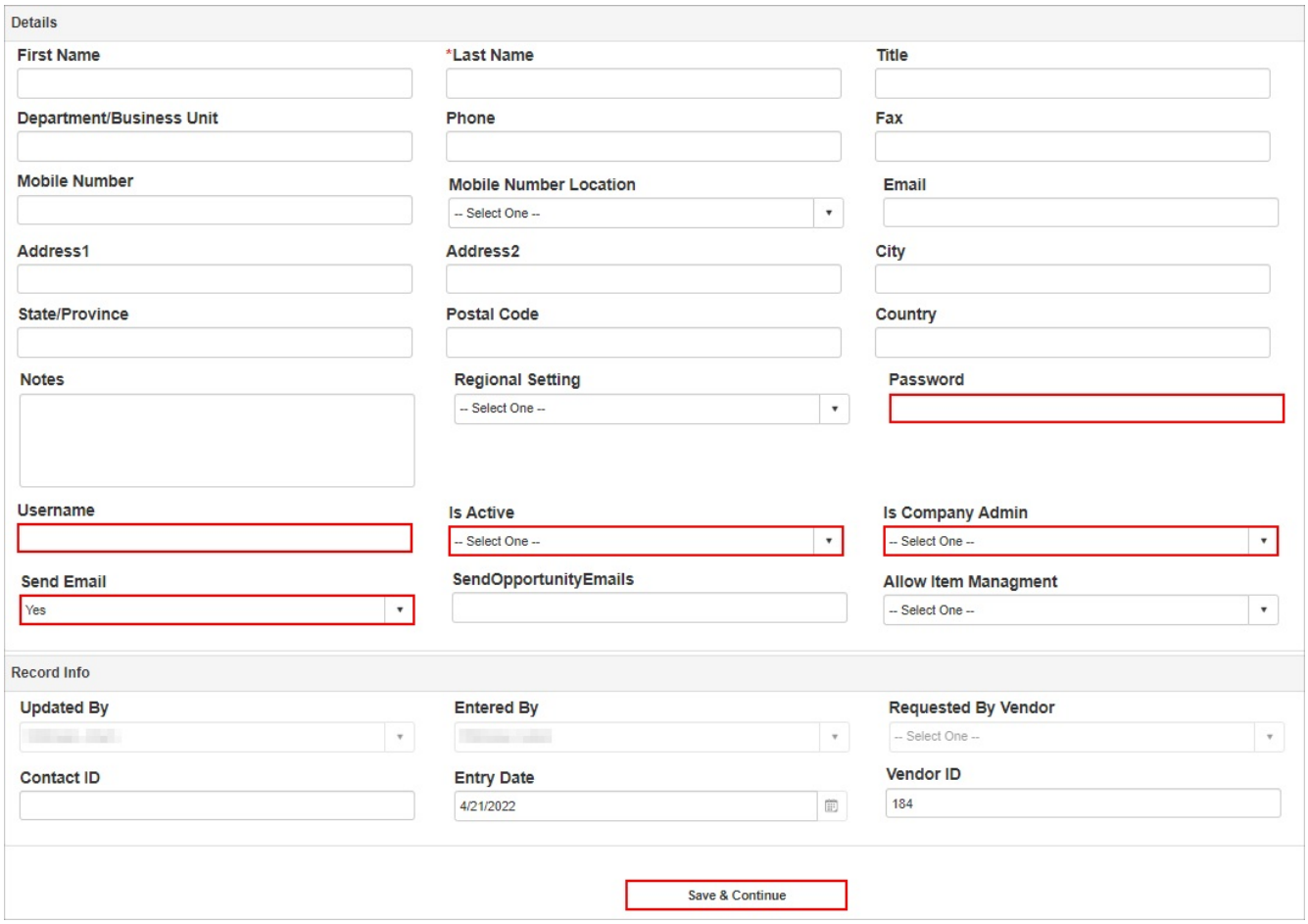


Click **Add Contact**.



The **Add Company Contact** screen displays.

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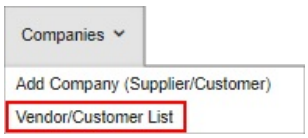
Note: the above highlighted fields are only needed if you organization as purchased the Optional Add-On Module for the Vendor/Client Gateway.

Enter the contact name and click **Save**.

Each contact entered will appear toward the bottom of the Company Details screen.

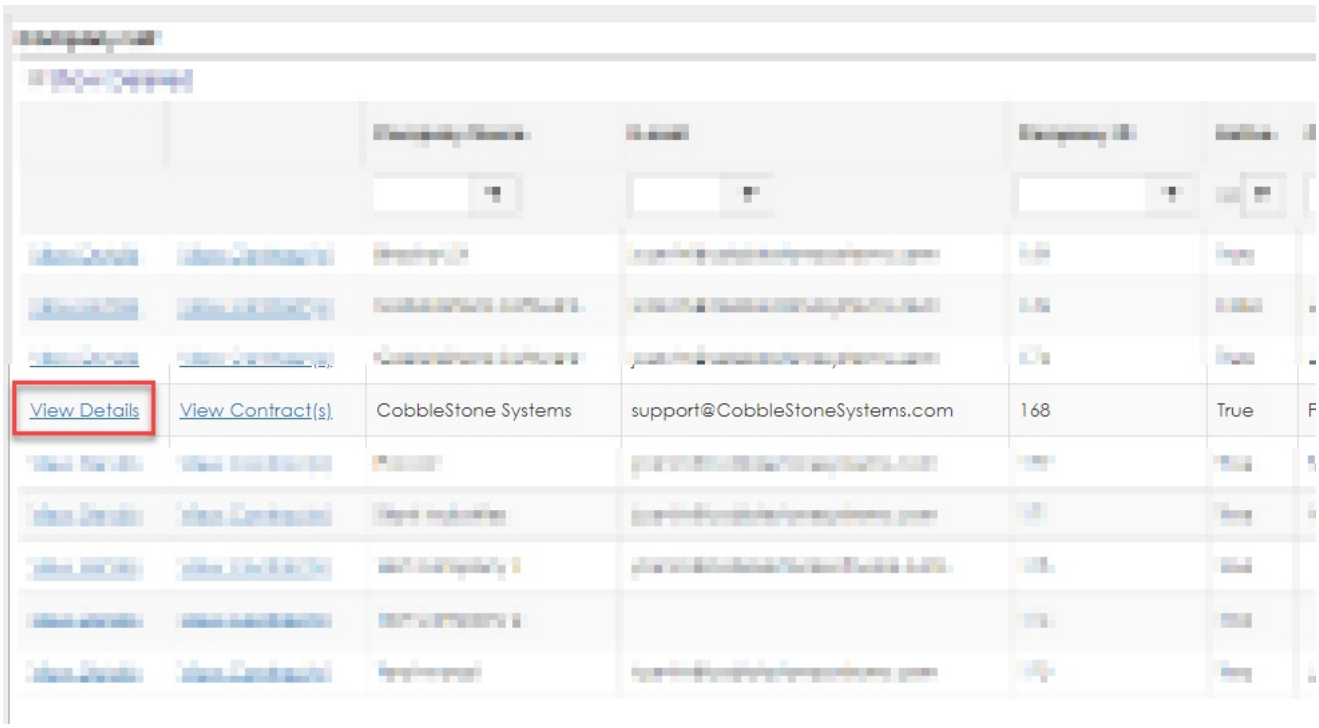
Send Vendor/Company Contact Password Reset

1. Click on **Companies** in the menu bar and select **Vendor/Customer List**.

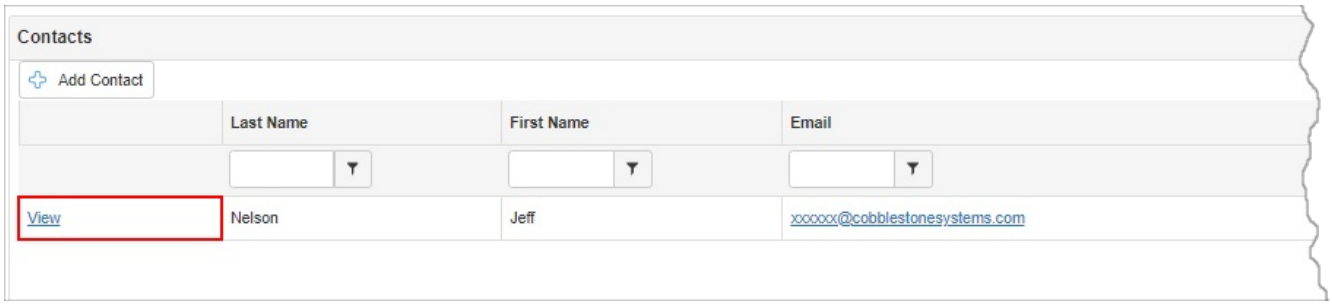


2. Scroll to the user's company and select **View Details**.

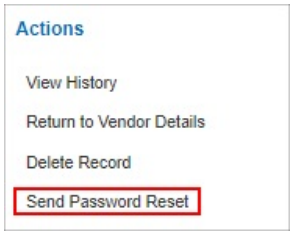
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3. From the **Company Details** page, scroll to the **Contacts** list and click **View** next to the user.

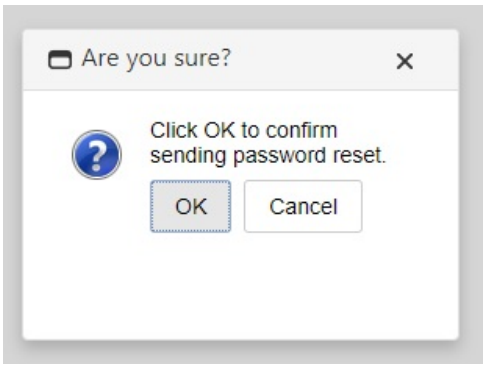


4. On the **Company Contact Details** page, click on **Send Password Reset** in the left menu.

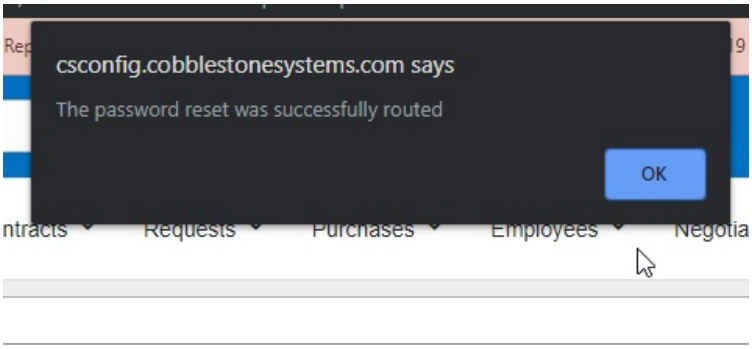


5. **Confirm** you would like to send the password reset.

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6. Successfully sent message will pop up. Click **OK** to close.



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04. Vendor/Company Rating & Scorecard

04. Company/Vendor Rating & Scorecard

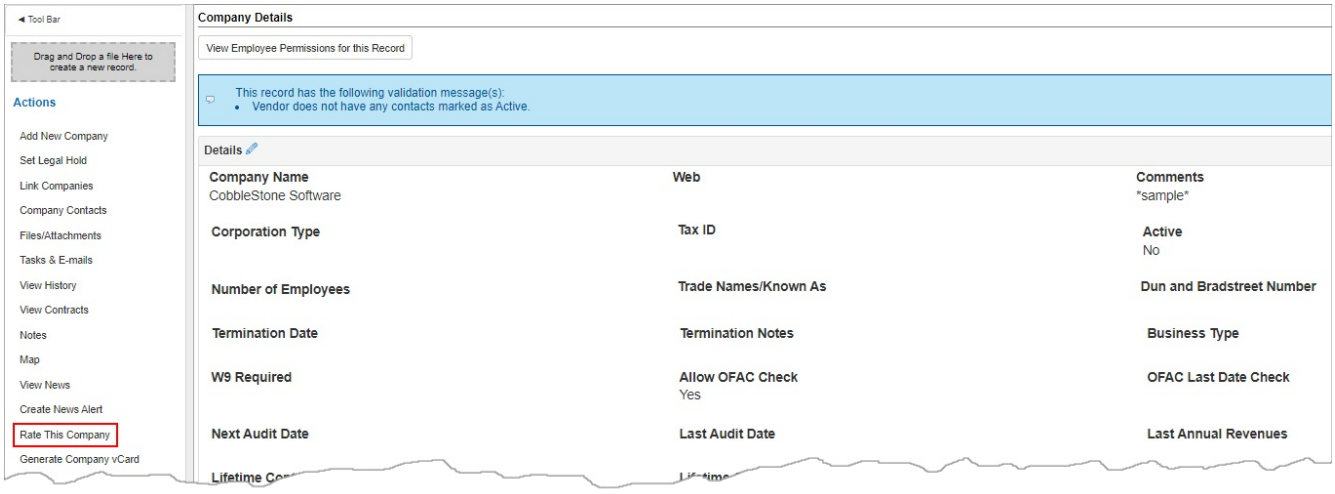
Vendor/Customer Management: Company/Vendor Rating & Scorecard

Contract Insight Enterprise offers the ability to rate both an organization's vendors and customers. Rating can be performed from both the vendor screen and the contract screen and, optionally, be tied to a specific contract and rating category. Over time, as the system collects more rating information for vendors/clients and contracts, the system will automatically average the rating by rating category for a company and compare this versus an average of all companies in the system. This data is aggregated to create a **Vendor Score Card**.

Rate a Vendor

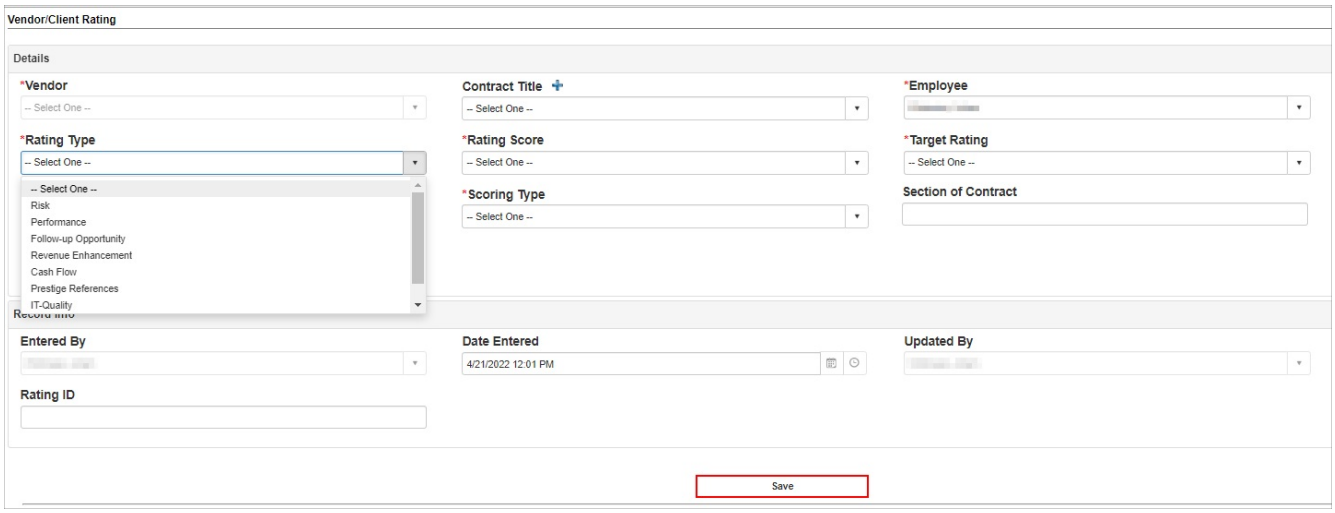
To rate a vendor or client (company), open the view **Company Details** from the **Company List** screen (alternately, select the Rating menu from a **Contract Details** screen).

Click **Rate This Company**.



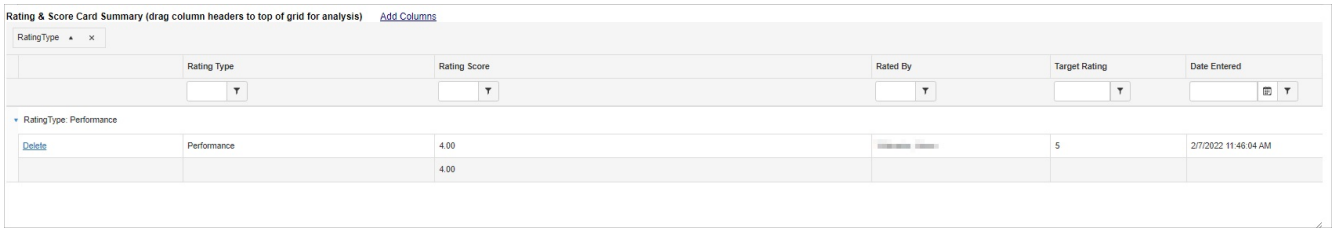
Enter a new rating or scroll down to view existing ratings.

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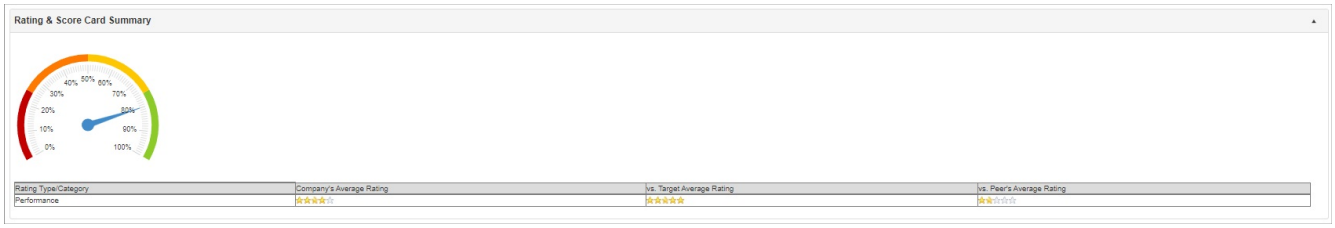


At the bottom of the **Vendor/Client Rating** screen, you can view, group, analyze, and print prior ratings.

Note: View a score card that compares the current company's rating versus other company ratings in the system.



Score card



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05. Product Service Codes

05. Product Service Codes

Vendor/Customer Management: Product Service Codes

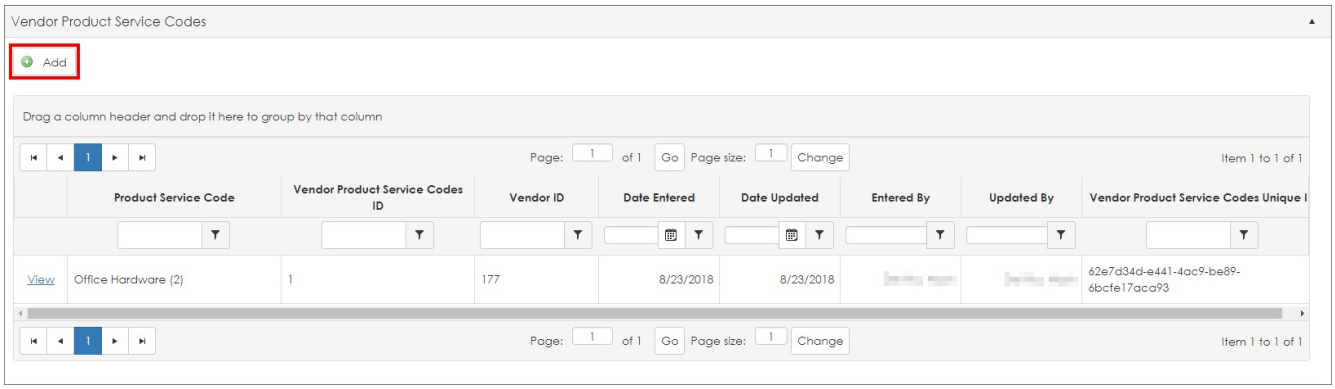
The **Vendor/Customer record details** screen allows for the setup and specification of product/service code assignment onto individual records. See the Product Service Catalog Wiki entry for more information on product/service codes. This functionality ties into CobbleStone's optional eSourcing add-on module for vendor notification of public opportunities via the **Vendor/Client Collaboration Gateway.**

Adding a Product Service Code

1. Navigate to the desired client/vendor record.

2. Scroll down to the **Vendor Product Service Codes** section of the record.

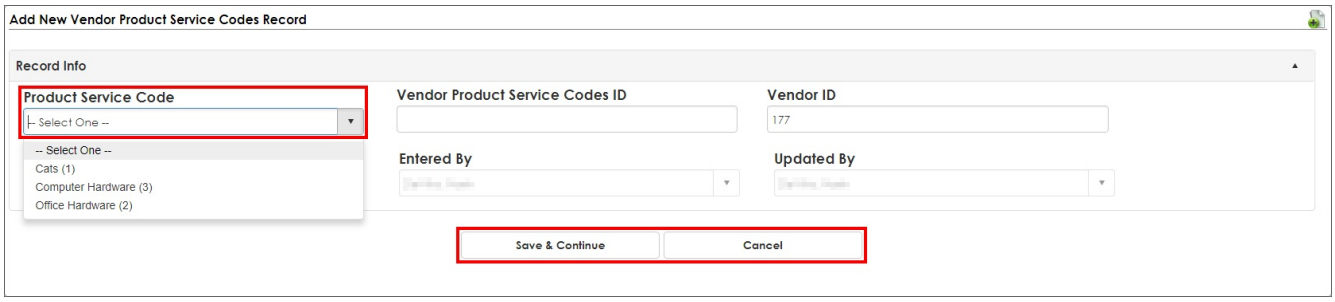
3. Click **Add**.



4. The **Add New Vendor Product Service Codes Record** screen displays. Select the desired code from the **Product Service Code** pick-list.

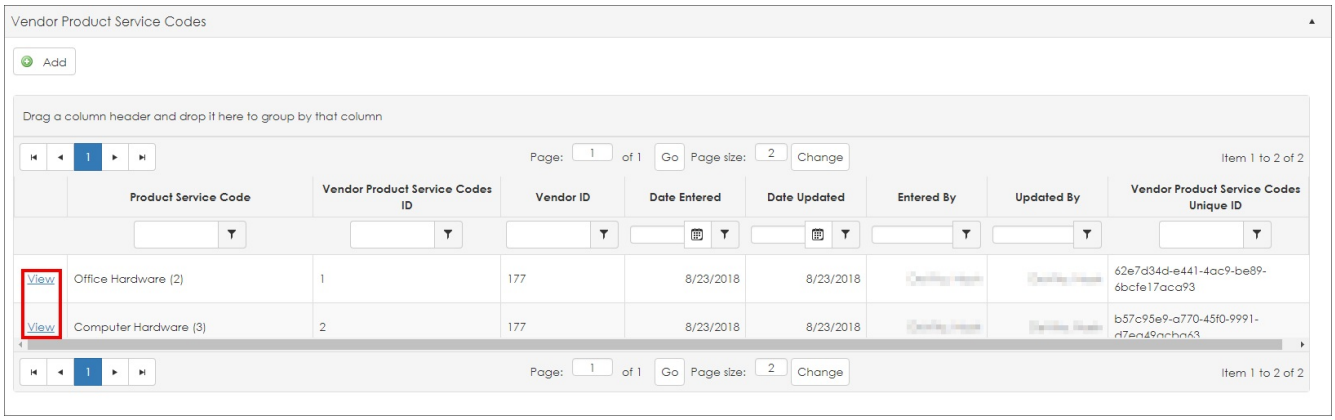
5. To associate the code with the selected vendor record, click **Save & Continue**. To abort the process, click **Cancel**. The **Company Details** screen displays.

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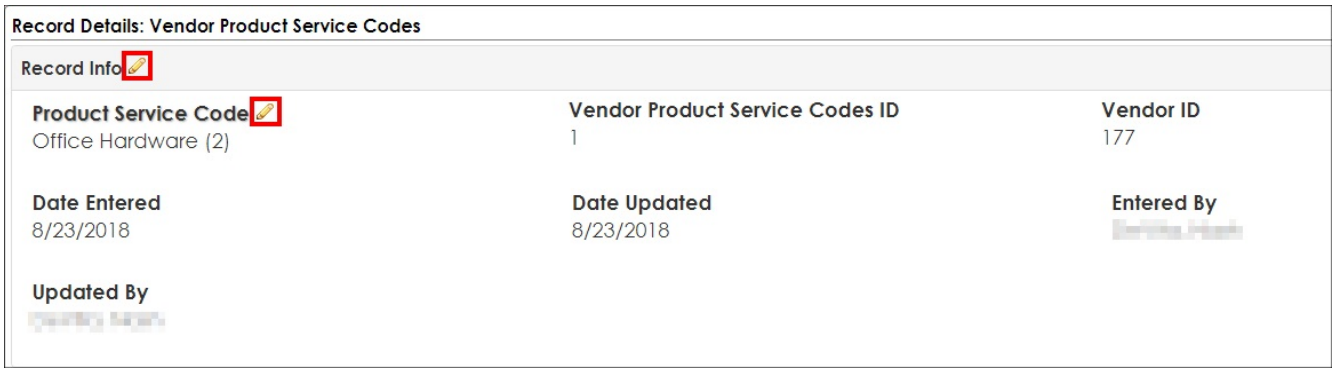


Editing a Product Service Code

1. Click **View** for the desired Product Service Code line item.



2. Click the **pencil icon** ( ) for the field or field group to alter.

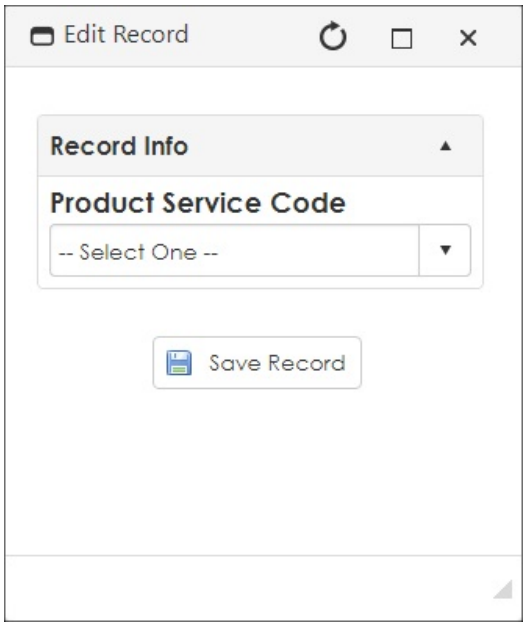


3. An **edit record** pop-up window displays.

4. Change the value as necessary.

5. Click **Save Record**.

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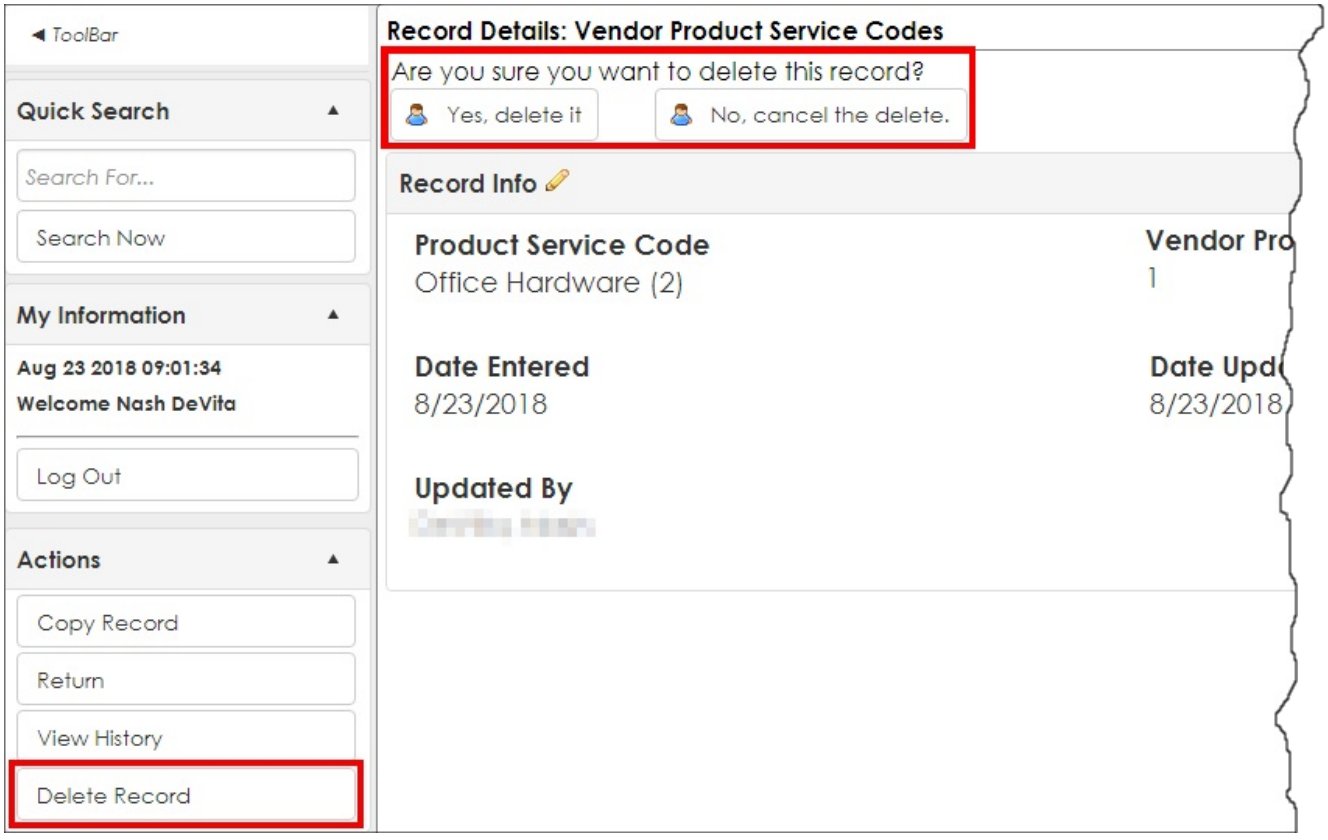


Deleting a Product Service Code from a Record

1. As above, click **View** for the desired Product Service Code line item.

2. On the **Record Details: Vendor Product Service Codes** screen's side menu, click **Delete Record**.

3. Click **Yes, delete it** to confirm or **No, cancel the delete** to reject the removal.



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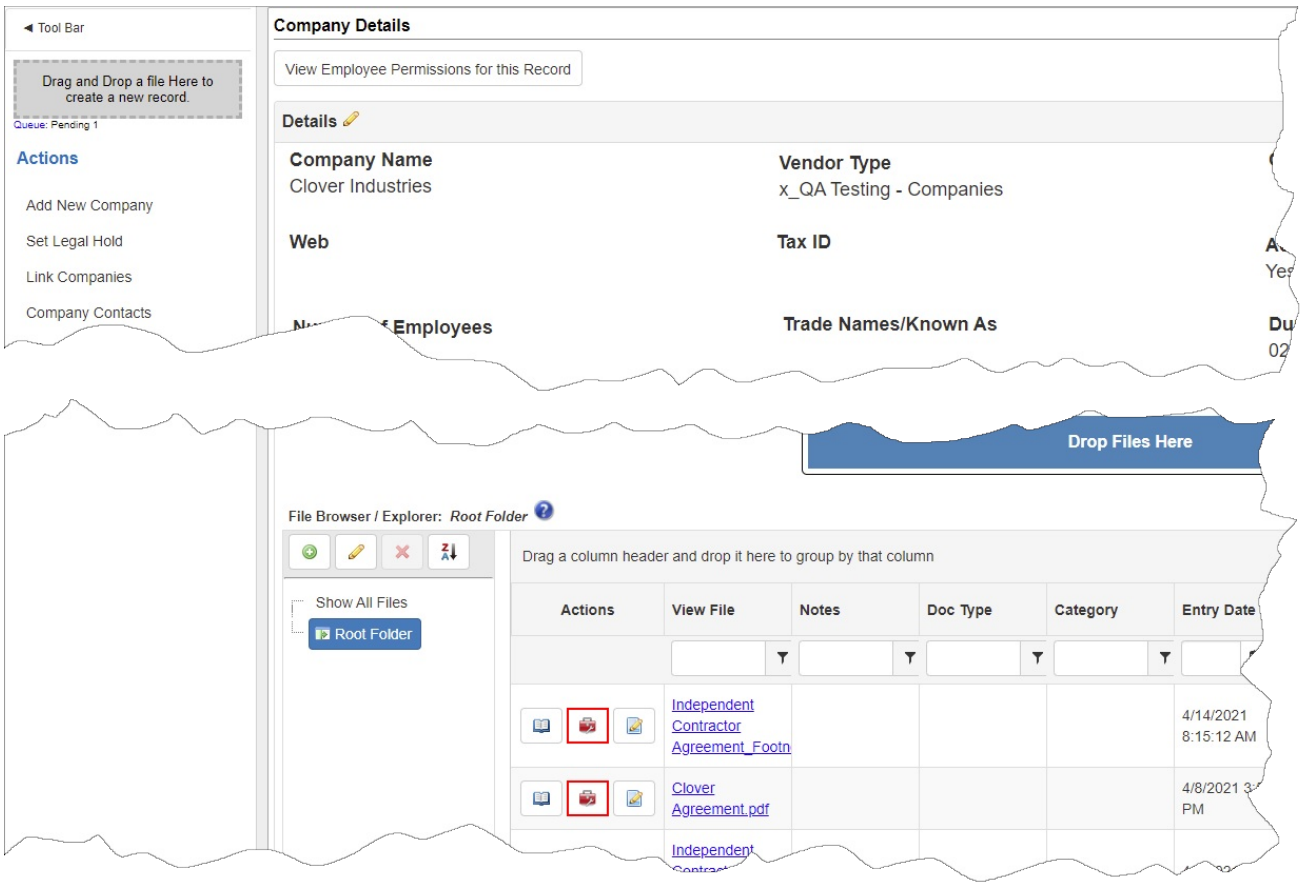
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File Restriction on Vendor Records

File Restriction on Vendor Records

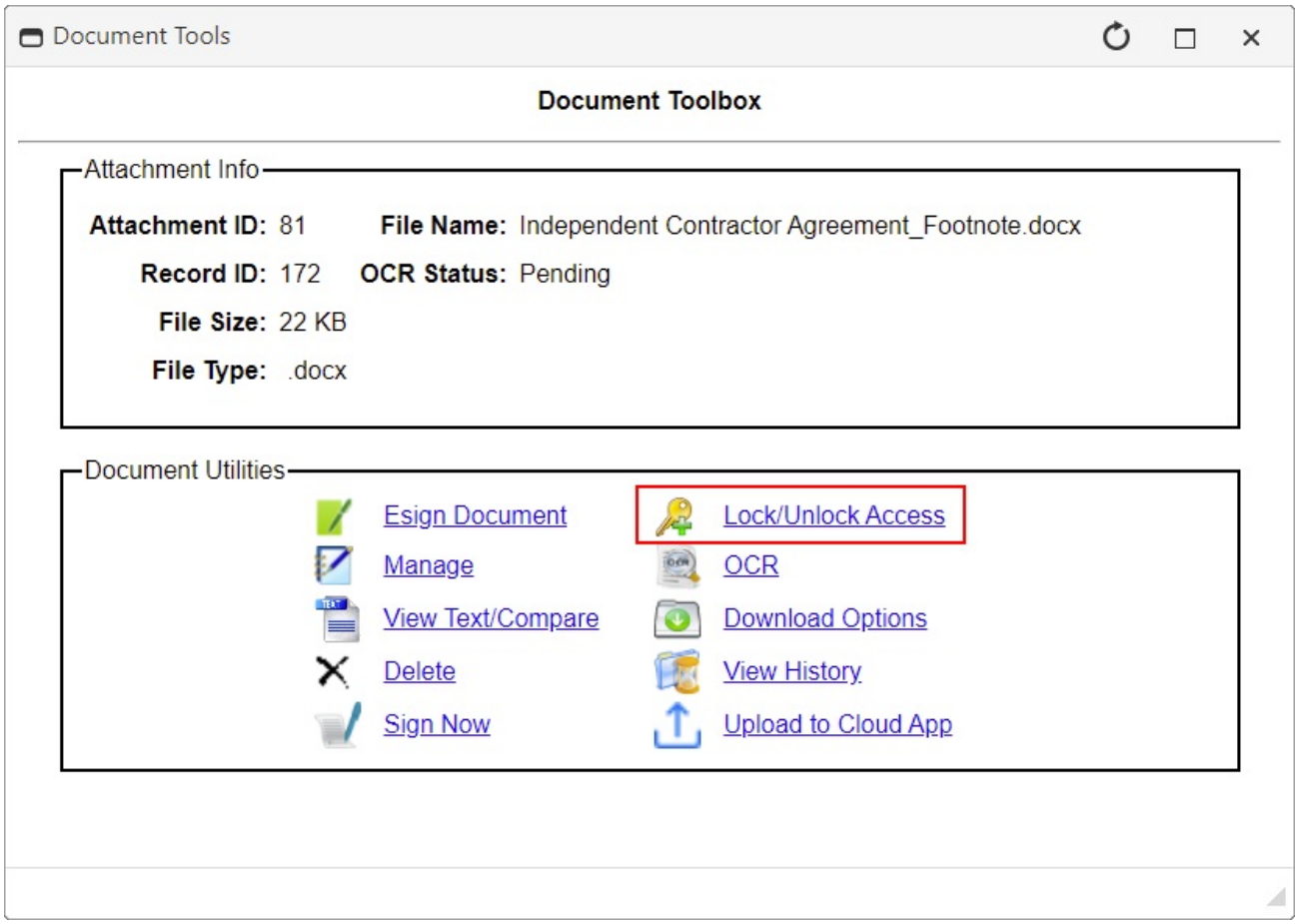
File Restriction on Vendor Records

Some attachments on vendor records can be confidential. For those reasons, we only want a certain amount of people to have the ability to access those files. As with contracts, users with access may lock/unlock access to an attachment on the Vendor/Customer record.

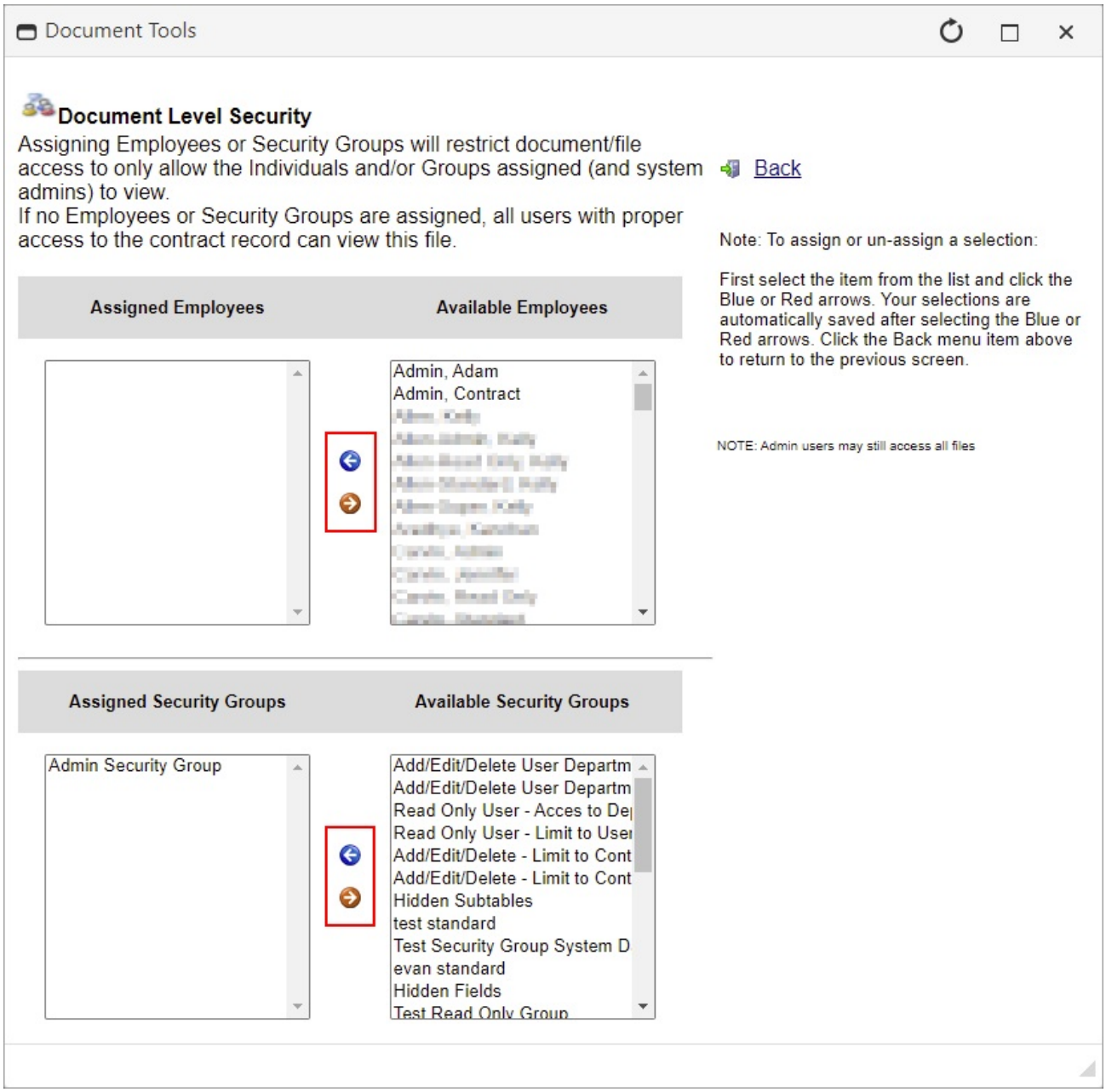


To set users or security groups with access to the attachment, click the **Document Toolbox** next to the attachment then click **Lock/Unlock Access**.

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Use the **blue** arrow to **assign** Employees/Security Groups, or use the **red** arrow to **remove** Users/Security Groups.

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Advanced Workflow Manager

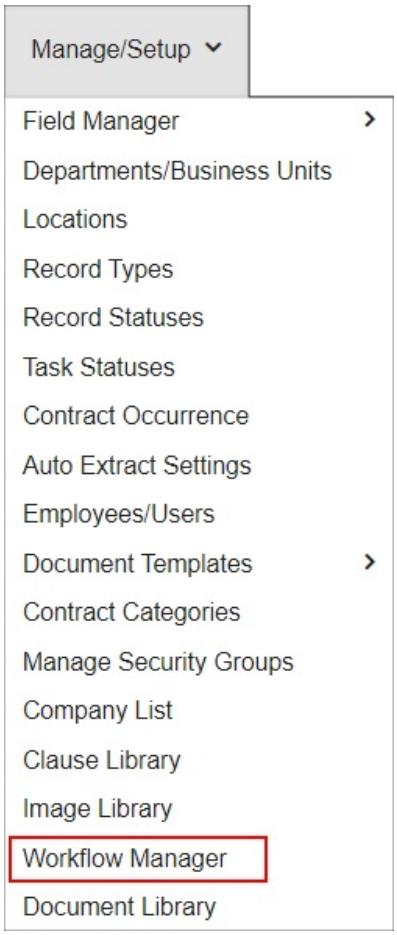
Advanced Workflow Manager

Workflow Management: Advanced Workflow Manager

Contract Insight supports the ability to create user-configurable and flexible workflow tasks. These workflow tasks can be configured based on any record field value or combination of field values. Workflows can be created for any existing tables (Contracts, Requests, Employees, Vendors/Customers, Solicitations) as well as for user-defined sub-tables.

Workflow automatically create tasks (calendar and e-mail alerts). Each time a new record is entered into the system and, if setup to do so, each time a record is updated, the system automatically creates tasks on/for that record. Tasks are assigned to an individual employee and can also be assigned to a group of employees (in addition to the individual employee assigned). You can also setup the Task start dates, end dates, notify days, repeat on an interval (weekly, monthly, quarterly and annually for recurring alerts) and can be escalated to another employee if needed. Finally, when a task is completed or rejected, application admins can specify a field or several fields to be automatically updated.

NOTE: Workflows created will only be applied to (create Tasks for) existing records when that record's field (that is in the actual Workflow Criteria) is updated. Workflow will not be applied to/run against existing records automatically by the system.



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We'll go into more depth on workflow construction and editing in the related pages - Create a New Workflow, Criteria Creation & Management, Task Creation & Management, and Field Update on Complete/Reject.

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Workflow Tasks Based on Contract Type

This functionality has been replaced by the Advanced Workflow Manager.

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Workflow Tasks Based on Department

This functionality has been replaced with the Advanced Workflow Manager.

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Workflow Tasks Based on Contract Status

This functionality has been replaced with the Advanced Workflow Manager.

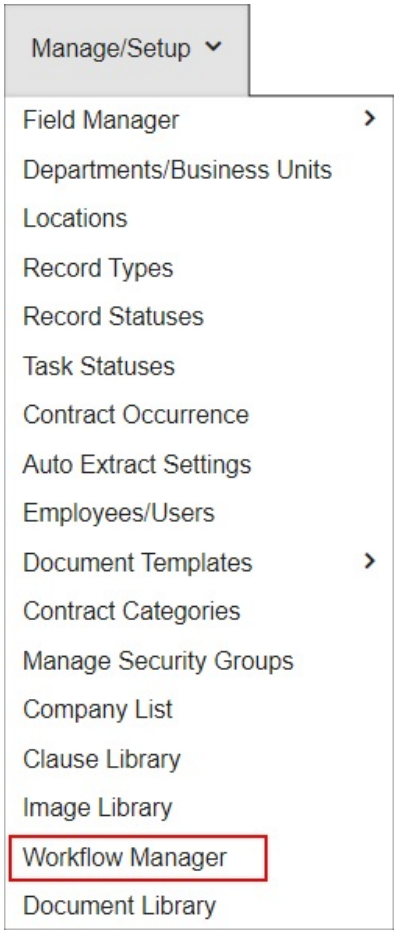
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Create a New Workflow

Create a New Workflow

Create New Workflow

The **Workflow Manager** allows you to configure and manage Workflow, which will automatically generate **Tasks** whenever specific **Field Criteria** is/are met. To Manage Workflow, navigate to **Manage/Setup** > **Workflow Manager**.

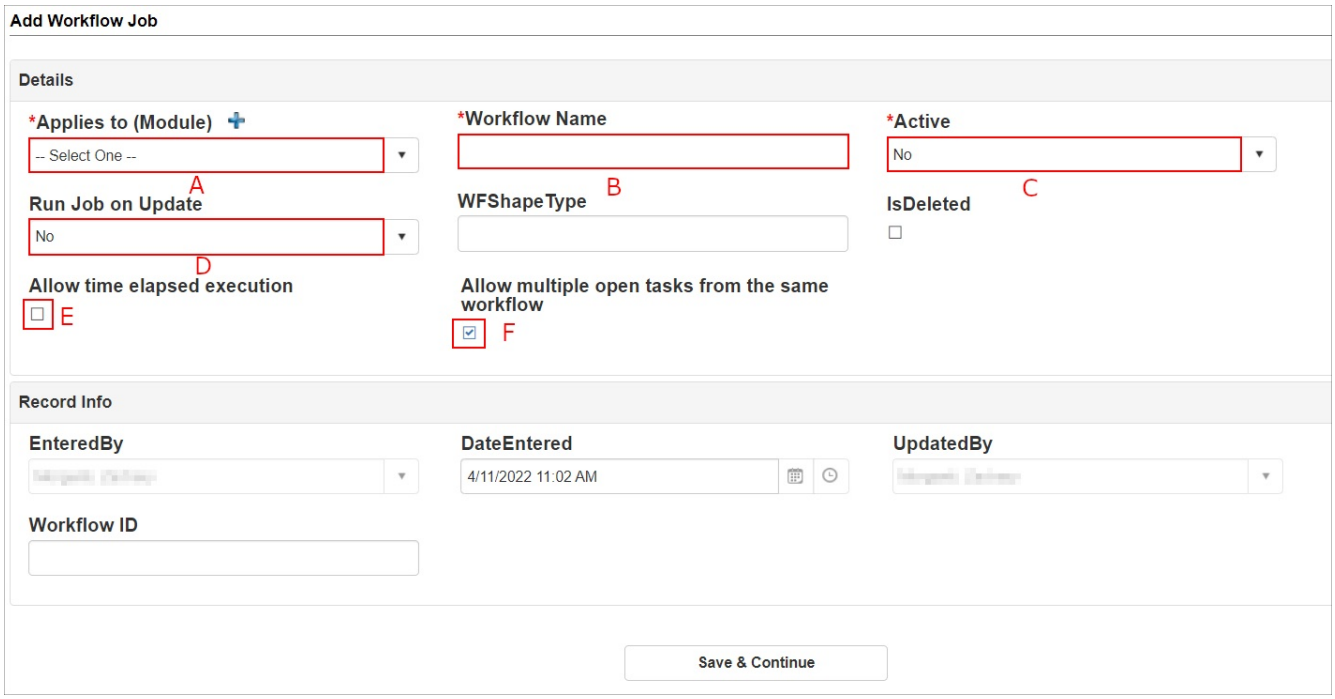


If there are any, a list of existing Workflow displays. To create a new Workflow, click **Add New Workflow**.

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The **Add Workflow Job** page displays. The page contains numerous important details.



A. **Applies to (Module):** Which area of the system (table) is the Workflow looking at to trigger? Think about what kind of Task to be generated; a **Contract Task**, a **Request Task**, or a **Vendor Task**? Other Tables available, but generally speaking, an administrator will select one of those three options. Workflow can trigger on Custom Sub-Table Entries, select the appropriate Sub-Table as applicable.

B. **Workflow Name:** Type in the name of the Workflow being added.

C. **Active:** Designate whether or not the Workflow is Active. If it is not Active, it will never trigger, even if its Field Criteria is met.

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D. **Run Job on Update:** Designate whether or not the Workflow should trigger if an existing record is updated to meet its Field Criteria. If this is set to No, the Workflow will only ever trigger when adding the associated record.

E. **Allow Time Elapsed Execution:** Designate if the Workflow should trigger only on a specified date.

Note: If Allow Time Elapsed Execution is set to yes, a condition/criterion must be set to look for a date. The SQL may need to be modified. Ensure assistance from CobbleStone or an individual in SQL helps with such.

F. **Allow Multiple Time Elapsed Tasks from Open Workflow:** If the Workflow is set to allow time elapsed execution, designate if multiple of that task - if open - can exist at once on a single record.

It may not seem so at first glance, but Workflow ID, EnteredBy, DateEntered, and UpdatedBy are all System Fields. The system completes these fields automatically.

When finished, click **Save & Continue** to create the new Workflow.

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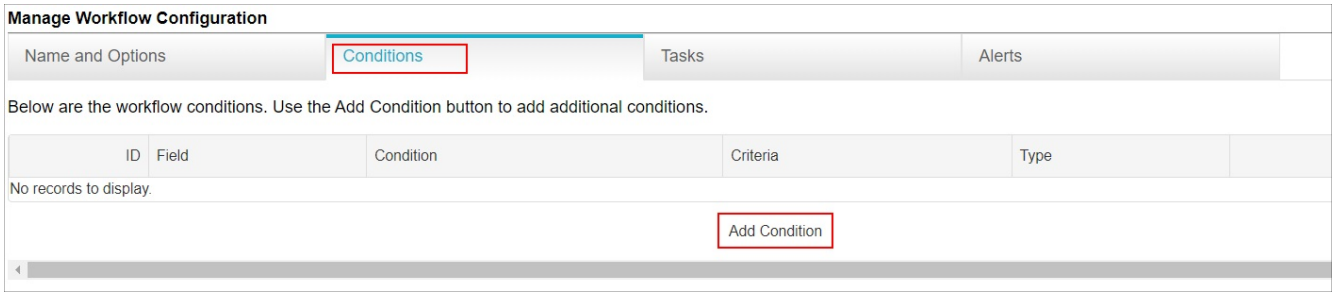
Criteria Creation and Management

Criteria Creation and Management

Criteria Creation & Management

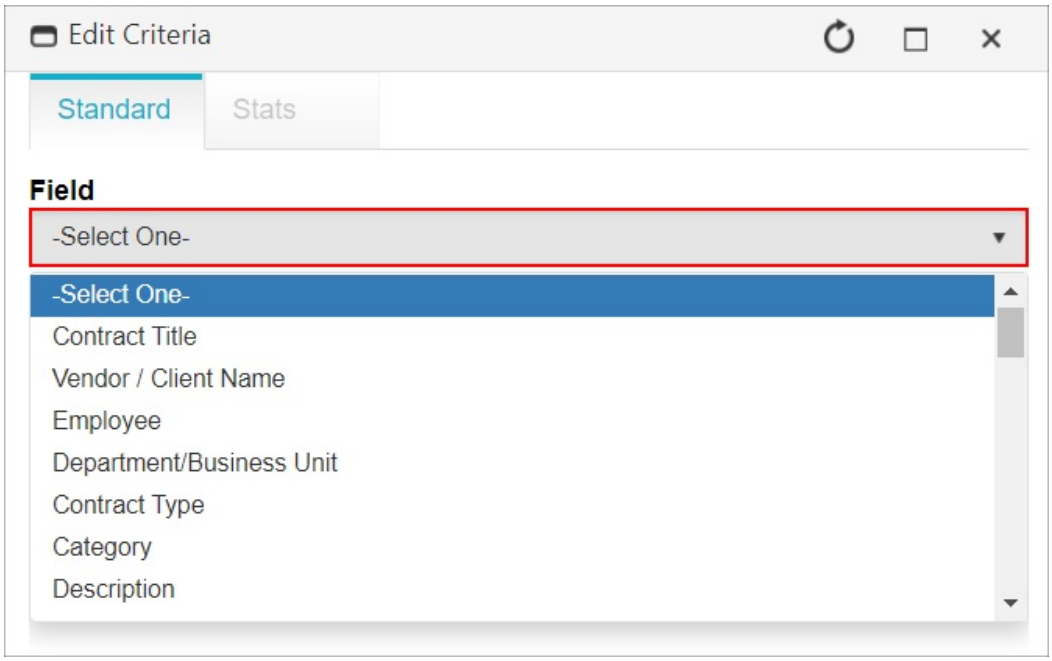
This page is a continuation of the **Create New Workflow** page, but the information here can also be used independently/for existing Workflow.

1. Click the **Conditions** tab to navigate to the selection area. Click **Add Condition**.



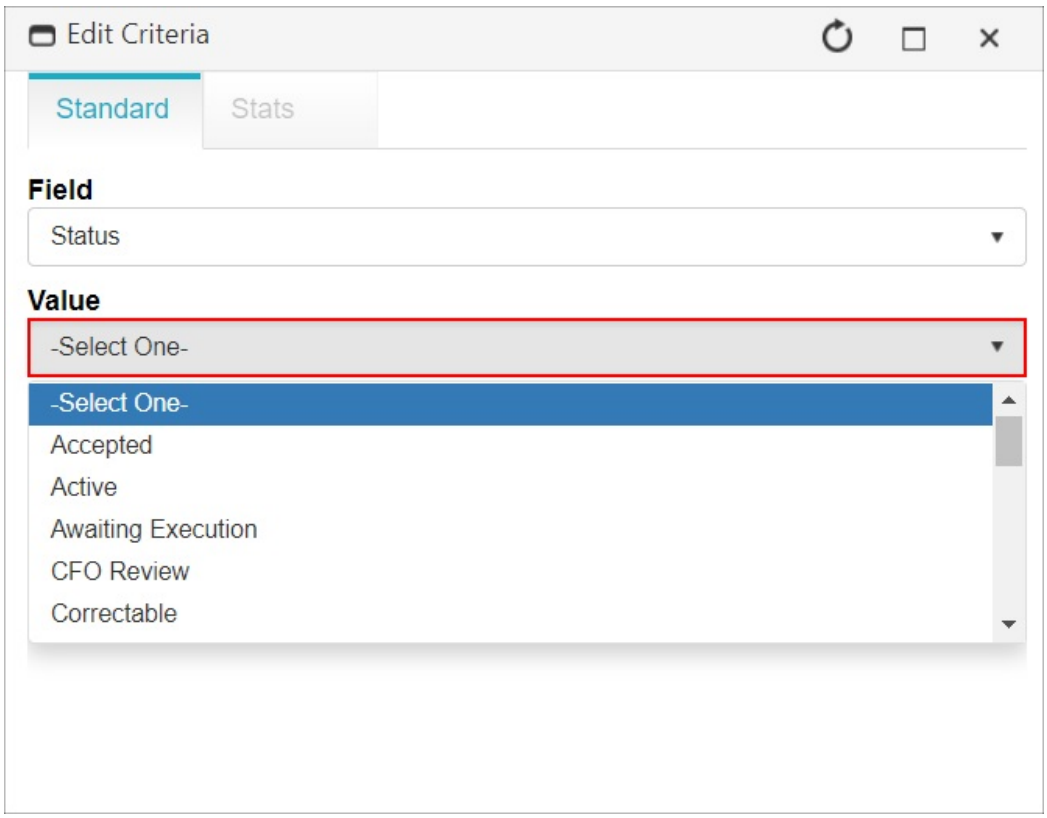
For this example, we are looking to construct a Workflow that will trigger for Contract Records that have their **Status** set to Pending, so we will select our **Criteria** accordingly.

2. Open the **Field** menu to select the field against which the criterion is to be set.



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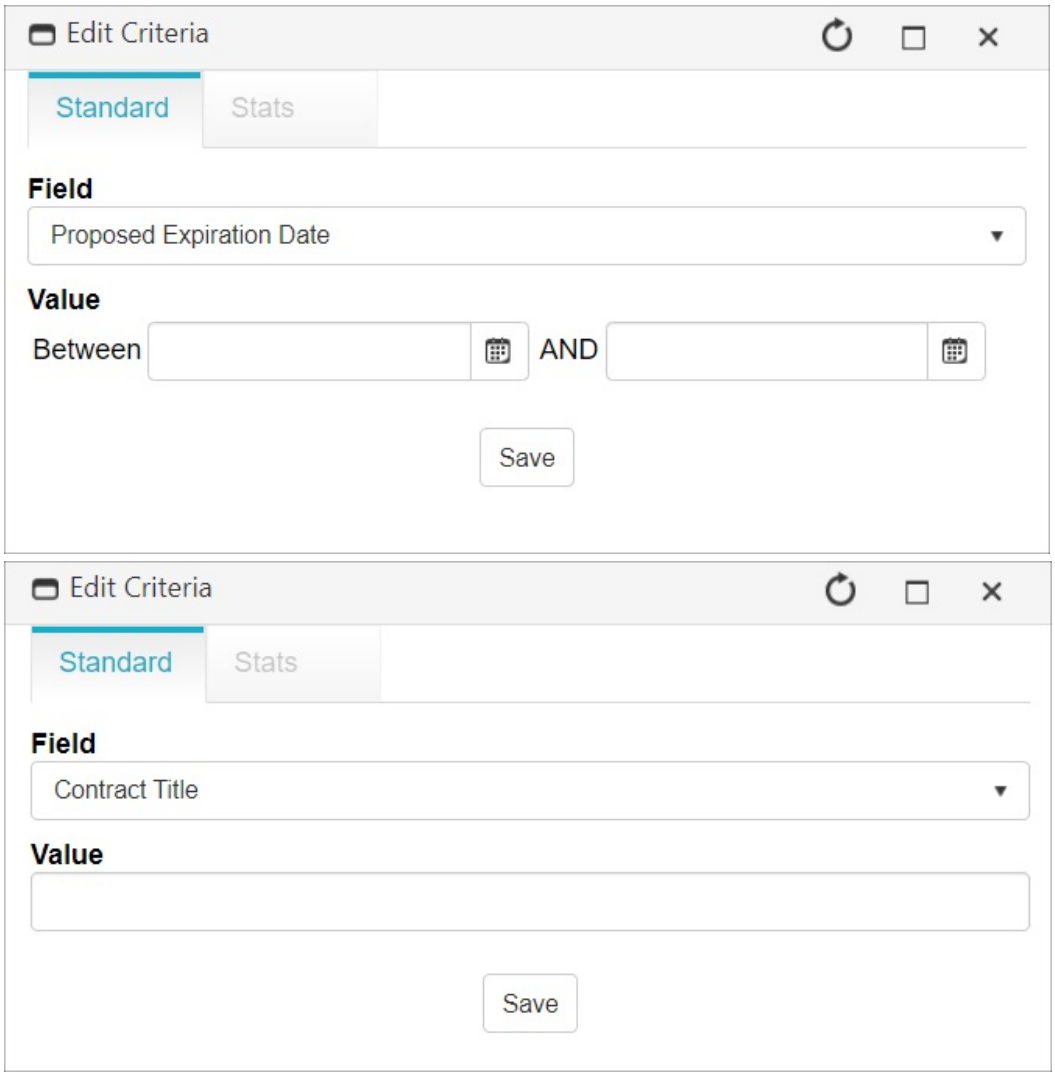
3. The **Value** menu displays. Select or enter the value for the criterion.



4. Be sure to click **Save** after selecting/entering the values.

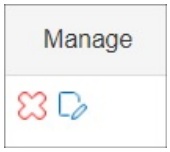
Note: the **Value** area changes accordingly with the type of field being worked with. **Date** fields will provide a date range with which to work and **Text Box** fields will provide a text box for you to type in the criteria value.

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After the **Workflow Criterion** has been added, it will appear in the list of Workflow Criteria, along with buttons to **Delete** or **Manage/Edit**. To edit Workflow Criteria, it is often easier to delete and then re-add than to edit the criteria, as it will involve manually editing the text of each criterion. For more advanced or intricate adjustments to Workflow Criteria, we recommend working directly with your Implementation Specialist or reaching out to CobbleStone Support.

Please note that any changes to Workflow Criteria will only come into affect when the Workflow is triggered after the changes are confirmed.



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Note: If working with date-based workflow and criteria, the condition will need to be edited and an advanced SQL statement put in its place. For example, if triggering a task based on the date being equal to the expiration date, the statement might look something like this: DATEDIFF(d,GetDATE(),Contract_End_Date) = 0.

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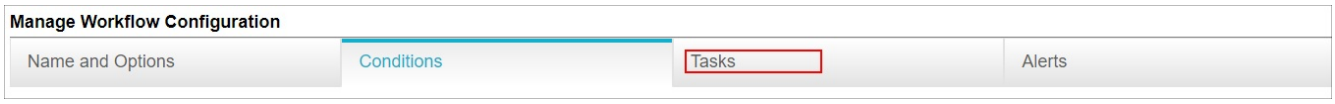
Task Creation and Management

Task Creation and Management

Workflow Management: Task Creation & Management

This page is a continuation of the **Criteria Creation & Management** page, but the information here can also be used independently/for existing Workflow.

Click the **Task** tab to navigate to the **Task List**. What is essentially an **Add Screen** for a new Task displays. Using this, detail the Task that will be triggered when the Workflow Criteria are met.



Employee: The Employee the Workflow Task will be assigned to. Due to the variable nature of Workflows, tasks can be assigned to a variety of Employees, including:

- **Employee:** The Employee Assigned to the record which triggers the Workflow
- **Employee's Manager:** The Manager of the Employee Assigned to the record which triggers the Workflow
- **Entered By:** The Employee who entered the record which triggers the Workflow
- **Updated By:** The Employee who last updated the record which triggers the Workflow

Auto Rotate: Alternately, a Task can be assigned to a specific Role/Group and then assigned to a Role/Group member by Sort Order, Sort Order - Fill Count, or Sort Order - Even Distribution.

Role/Group: Optionally, assign an Employee Role/Group to the Task as well. Members of the Role/Group will be treated as if they were the Employee Assigned to the Workflow Task, meaning they will receive the Task Alerts and, dependent on their Permissions, be able to Accept/Reject the Task.

Task Title/Name: The Title or Name of the Task that will be generated.

Task Note/Description: Details of/instructions for the Task, including what, if anything, is expected of the recipient.

Task Start Date and End Date: Due to the variable nature of Workflow (it can be triggered any time the Criteria are met), the Start Date and End Date are based on variables as well. A good rule of thumb is to start with the right-most drop down, selecting which Date Field you'll base the Task Date on, and then designate that date to be X number of days Before or After the value of that Date Field. In our example, we'll see that the Start Date is set to 0 days before record's Date Updated, and the End Date is set to 7 days after record's Date Updated. Therefore, the Task Start Date will be set to the day the record triggers the Workflow, and the Task End Date will be 7 days later.

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Non-Working Days: Non-Working Days can be applied to ensure that Task Dates do not fall on Non-Working Days. Tracking Only means this feature is not being used, while setting it to Adjust End Date will turn on the functionality and allow an administrator to change the remaining settings. Do Not Adjust Notify Days will let the Notify Days fall on any day, while Adjust Notify Days will adjust in accordance with the next setting. The **Method** drop down is where you determine how you will adjust the Task Alert dates, if they would fall on a Non-Working Day.

- **Extend to next working day:** If the alert falls on a Non-Working day, it will be extended to the next working day. For example, if the alert would fall on a Saturday, it would likely be extended to the next Monday.
- **Curtail to previous working day:** If the alert falls on a Non-Working day, it will be curtailed to the previous working day. For example, if the alert would fall on a Saturday, it would likely be curtailed to the previous Friday.
- **Extend for each non working day:** This method effectively says you want the task to be worked on for X number of business days. If the Task End Date falls 30 days from the Task Start Date, the Task will actually be due 30 business days later, as the End Date will get pushed out one day for each Non-Working Day the range encounters.

Notify Before: Designate how many days before the Task End Date you want to be notified. If this mathematically ends up being before the Task Start Date, the Notify Alert will not go out. In our example, Notify Before is set to 7. With the Task End Date being set to 7 days after the Task Start Date, the Notify Alert will effectively be sent on the Task Start Date.

Repeat/Recur: Designate whether or not you want the Task to Repeat/Recur until the Contract's End Date.

Escalate To: Optionally Escalate the Task to an individual X number of days after the **Task End Date**, if the Task has not been Completed. For example, if the Task Escalates after 7 days, it will start that countdown on the Task End Date, Escalating 7 days later if the Task has still not been Completed.

Alternate Email: Optionally designate an additional email address to send all Task Alerts to. This can be treated like the CC: function on emails.

Task Type: An optional field purely for additional reference. Enter a value here if it will be useful for Searching and Reporting.

Include Alternate/Assigned Employees: Optionally include Employees that are Additionally Assigned to the record which triggers this Workflow. They will be treated as if they are directly assigned to the Workflow Task. Please note that this will not work alongside a Workflow that is does not have **Run Job on Update** turned on, as the Contract Record cannot have Additional Employees Assigned until after it is entered.

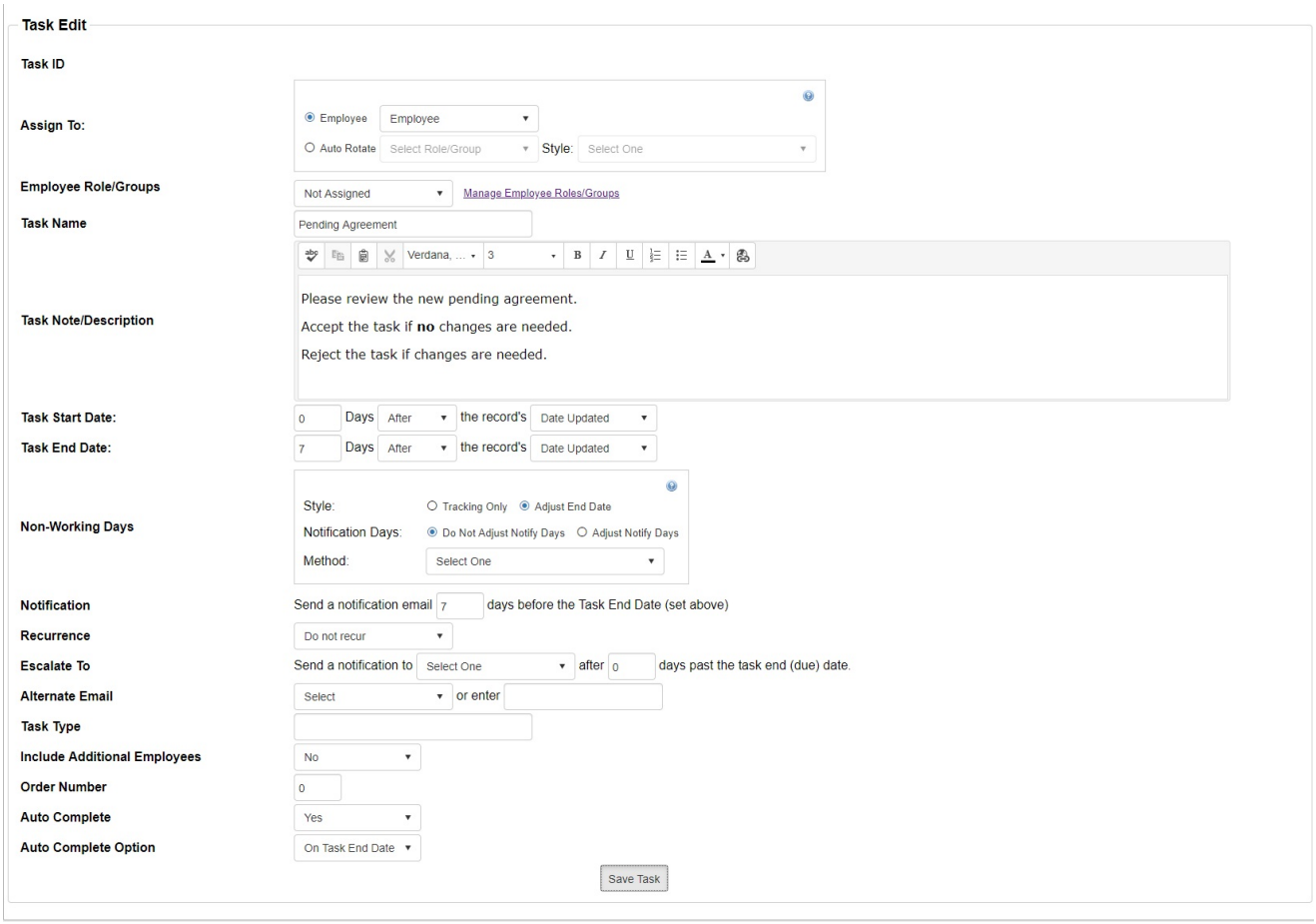
Order Number: Optional functionality if you will have multiple Tasks on a single Workflow Record and want them to flow in a specific order. We generally recommend avoiding this and instead using Field Updates and sequential Workflow that has the new Field Value(s) as part of its Criteria.

Auto Complete: This functionality will automatically Complete the Workflow Task. This is useful if the Workflow Task is only for notification purposes.

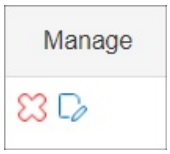
Auto Complete Option: If a Task is set to Auto Complete, it can then be configured to either Auto Complete After Notification (as soon as it's first alert goes out) or On Task End Date.

Once the Workflow Task Details are appropriately filled out, click **Add**. The Workflow Task below has been configured to notify the Employee Assigned to the record as soon as the Contract's Status is set to Pending, with the task due 7 days later. They are instructed to **Accept** the Task if no changes are needed or to **Reject** it if changes are needed.

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After clicking **Save Task,** the Task will be available in the **Tasks List** section toward the top of the screen. Clicking **Delete** on the side deletes the Task while clicking **Edit** allows admin users to edit it. Editing a Task will reveal the Field Updates section, which we will discuss on the next Wiki page.



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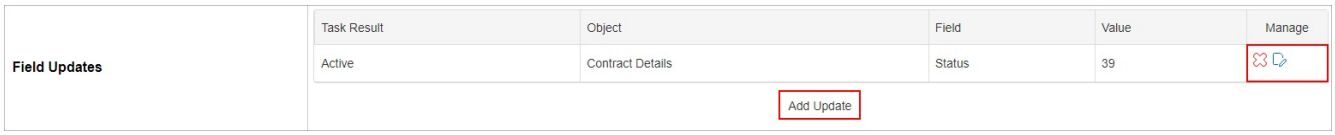
Field Update on Compete/Reject

Field Update on Compete/Reject

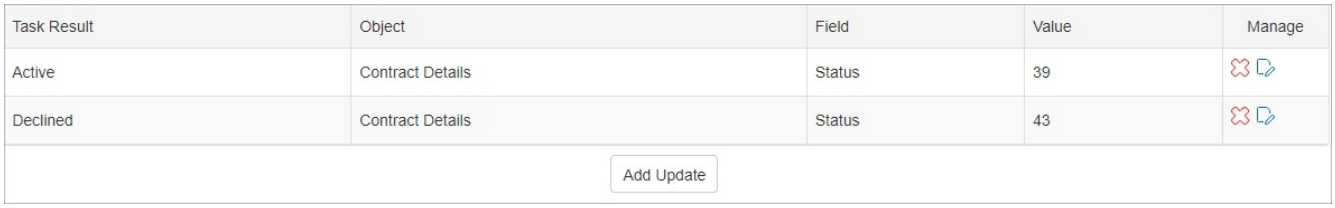
Field Updates on Complete/Reject

This page is a continuation of the **Task Creation & Management** page, but the information here can also be used independently/for existing Workflow.

When Editing an existing Workflow Task, an additional module labeled **Field Updates Associated With (Task Title)** displays. Designate Field Updates that occur when the Task is Completed or Rejected in this area. Click **Add New Update** to add an update.



Designate whether the Update is for when the Task is Completed or when the Task is Rejected. Then, select the **Field** that is being Updated. After selecting the Field, the pop-up will reload to allow you to designate the new **Value**. In the example below, we set the Task to Update the Status to Active if Completed, or to Update the Status to Declined if Rejected. Use the **Delete** or **Edit** buttons to Delete or Edit the Field Updates.



Please note that field updates are not limited to one of each.

When handling multi-step Workflow, a good general practice is to use multiple Workflow Records, where the initial Workflow will Update a Field so that the new Value is a Criteria of the next Workflow, triggering it. This can be repeated until the Workflow is complete.

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Task Status Manager

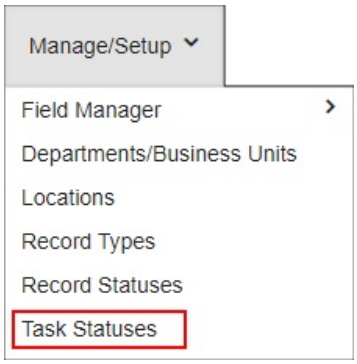
Task Status Manager

Task Status Management

In addition to record statuses, CobbleStone offers an area for task statuses. These status values offer alternatives to Complete/Approve and Reject completion options for tasks. Changes made on this page impact all tasks for the module.

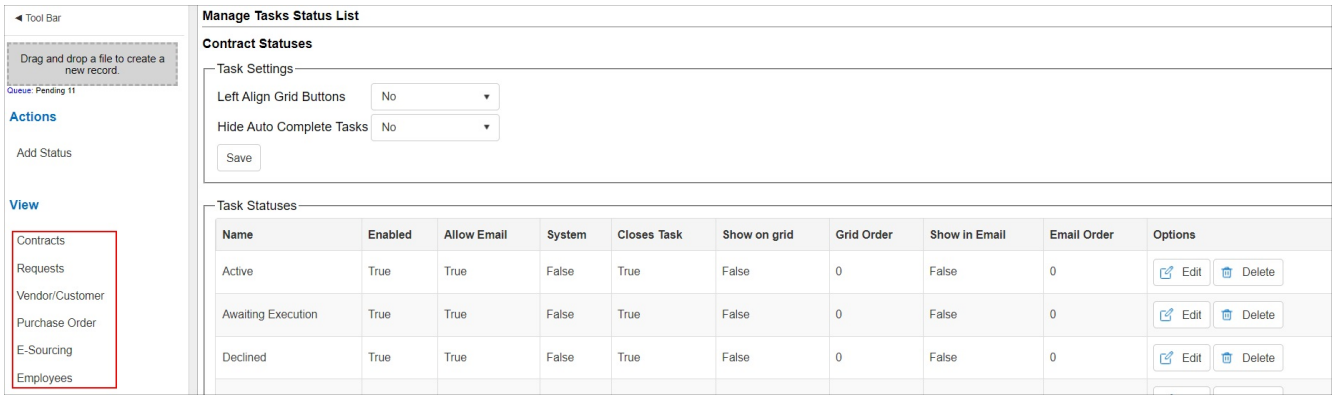
View Task Status Values

1. Log in as system admin user and navigate to **Manage/Setup - Task Statuses.**



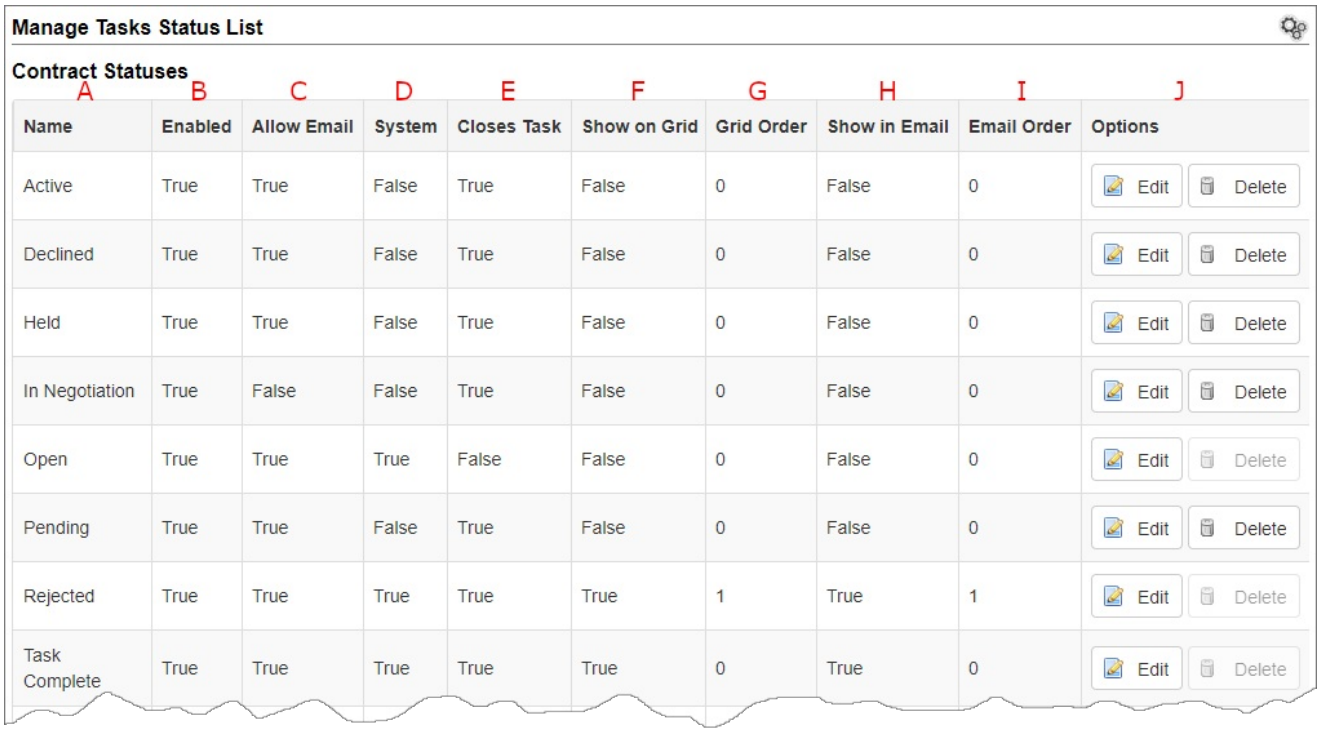
2. The **Manage Task Status List** page displays.

3. The list defaults to the **Contract Task Status** List. From the side menu, select the desired module/area if another is needed.



Each module's task status list displays numerous details.

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A. **Name**: The display name of the task status

B. **Enabled**: Set to True to allow users to set the item as a task status value.

C. **Allow Email**: Set to True to have CobbleStone send notifications for tasks in the status.

D. **System**: For out-of-the-box values, True displays. For user-defined values, False displays.

E. **Closes Task**: By default, setting a task to a status closes that task. Tasks can remain open, however, for values that are set to False. Keeping a task open allows the optional **Open Task** pop-up to display and still permits escalation.

F. **Show on Grid**: Set to True to have the value display on the task's side menu and on the task preview grid on the parent record.

G. **Grid Order**: For values showing on the grid, in what order, from left to right, they display

H. **Show in Email**: If task status buttons are used in task email messages and the status is set to show on grid, set to True to have the status also appear as an option in notification email messages.

I. **Email Order**: For values showing in email, in what order, from left to right, they display

J. **Options**: Click **Edit** to make changes to a task's properties (as above). Click **Delete** to remove a user-defined value from CobbleStone.

Note: Task status values marked as True for System cannot be deleted.

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On-Screen Validation Message

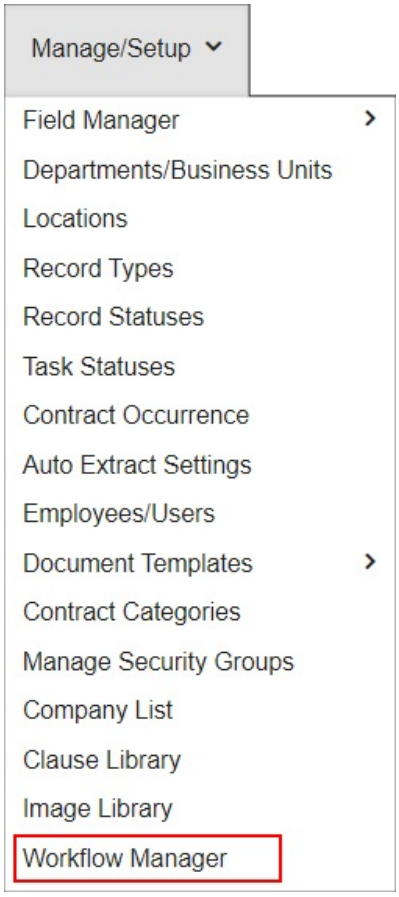
On-Screen Validation Messages

On-Screen Validation Messages

On-screen validation Messages are a useful tool to display information about the record a user is currently viewing such as a Contract Record, PO Record, eSourcing Record, Requests, and Vendor/ Customer Record. It is useful for Risk Management and as a preventative and detective risk control feature. For example, if a user is viewing a contract record, and you want to have an on-screen alert display a message if the contract value is over $20,000 (for example), on-screen messages may be helpful.

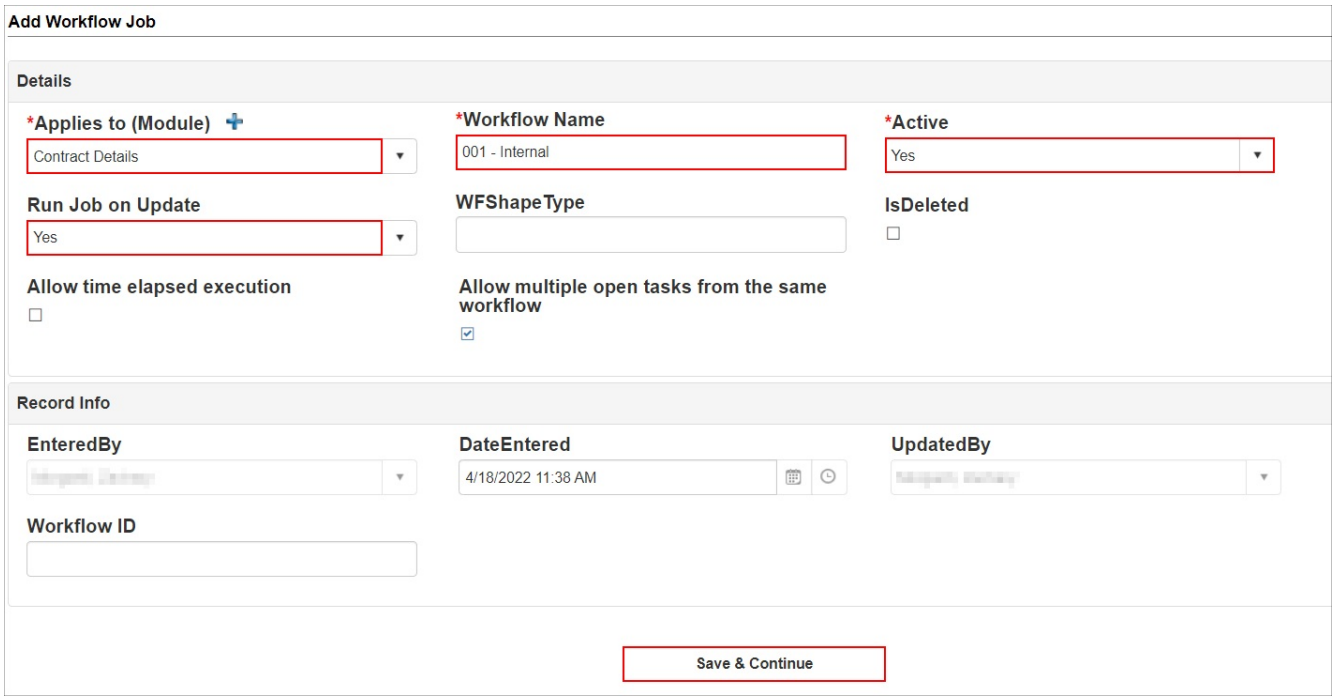
Adding a Validation Message

1. Log in as system admin user and navigate to **Manage/Setup** - **Workflow Manager**.



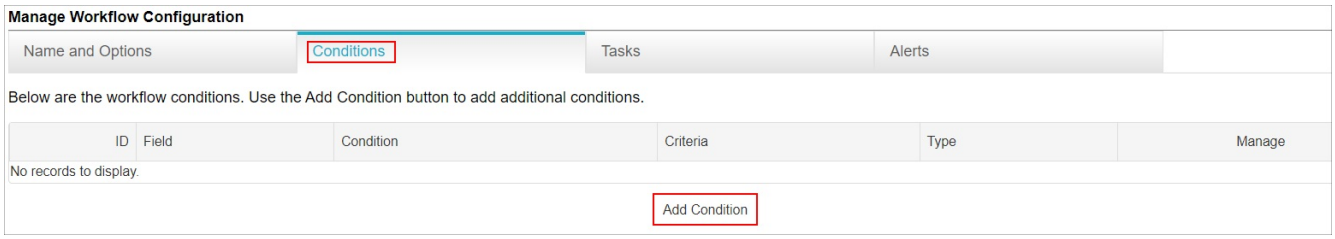
2. Add a new workflow or edit an existing one.

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In this example, a Workflow Job on a Contract Record is being added. This work flow will not have any tasks alerts, rather this workflow will have an on-screen alert (workflow may have both on-screen alerts and tasks alerts). Be sure to click **Save & Continue**. The system goes to the **Manage Workflow Configuration** display screen.

3. Click the **Conditions** tab.

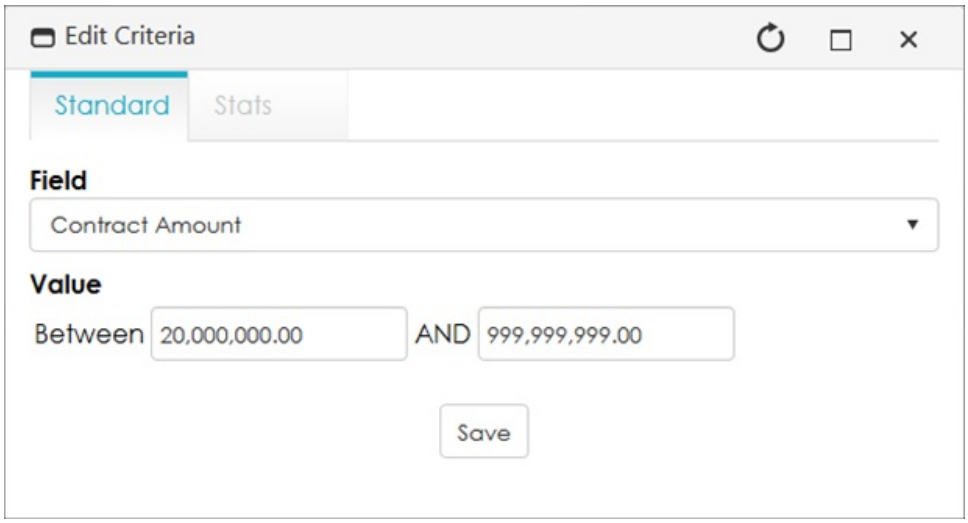


4. Click **Add Condition**.

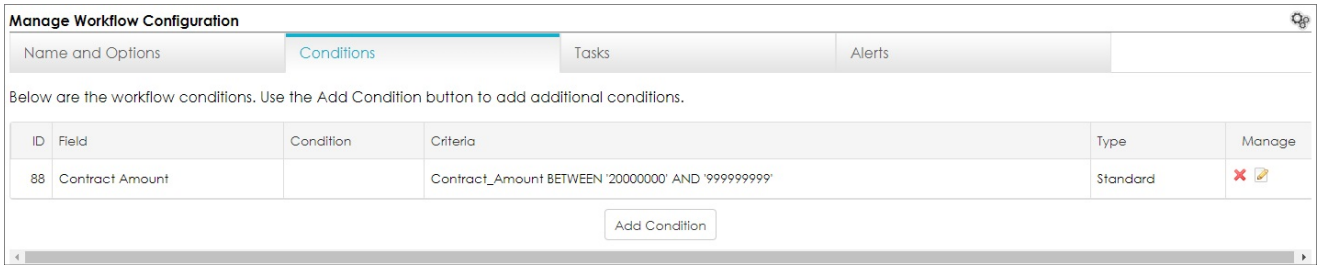
5. Select the **Field** and set the conditions [criteria] to teach machine learning engine this rule. In this example, we are setting the rule to trigger when the Contract Amount field exceeds 20,000,000.00, so we set a between value of 20,000,000.00 and 999,999,999.00.

6. Click **Save**.

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7. The screen refreshes and displays the new criterion.

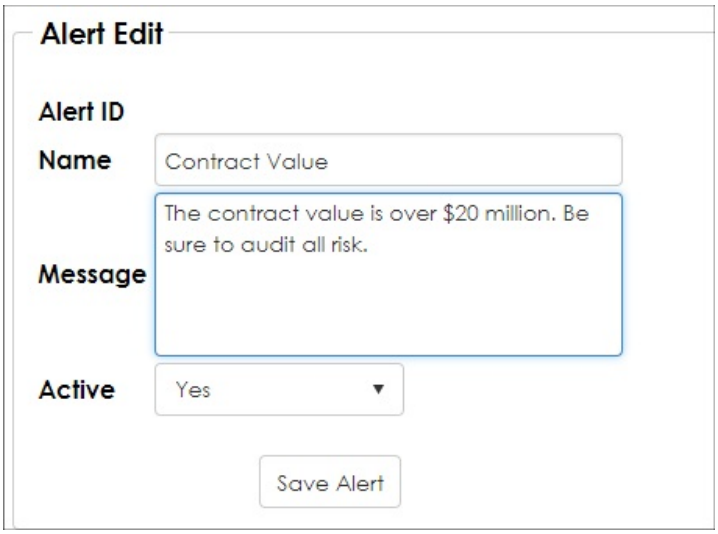


8. Click the **Alerts** tab.



9. Enter the desired **Alert Name** and **Message** to be displayed on the record if the established conditions are met.

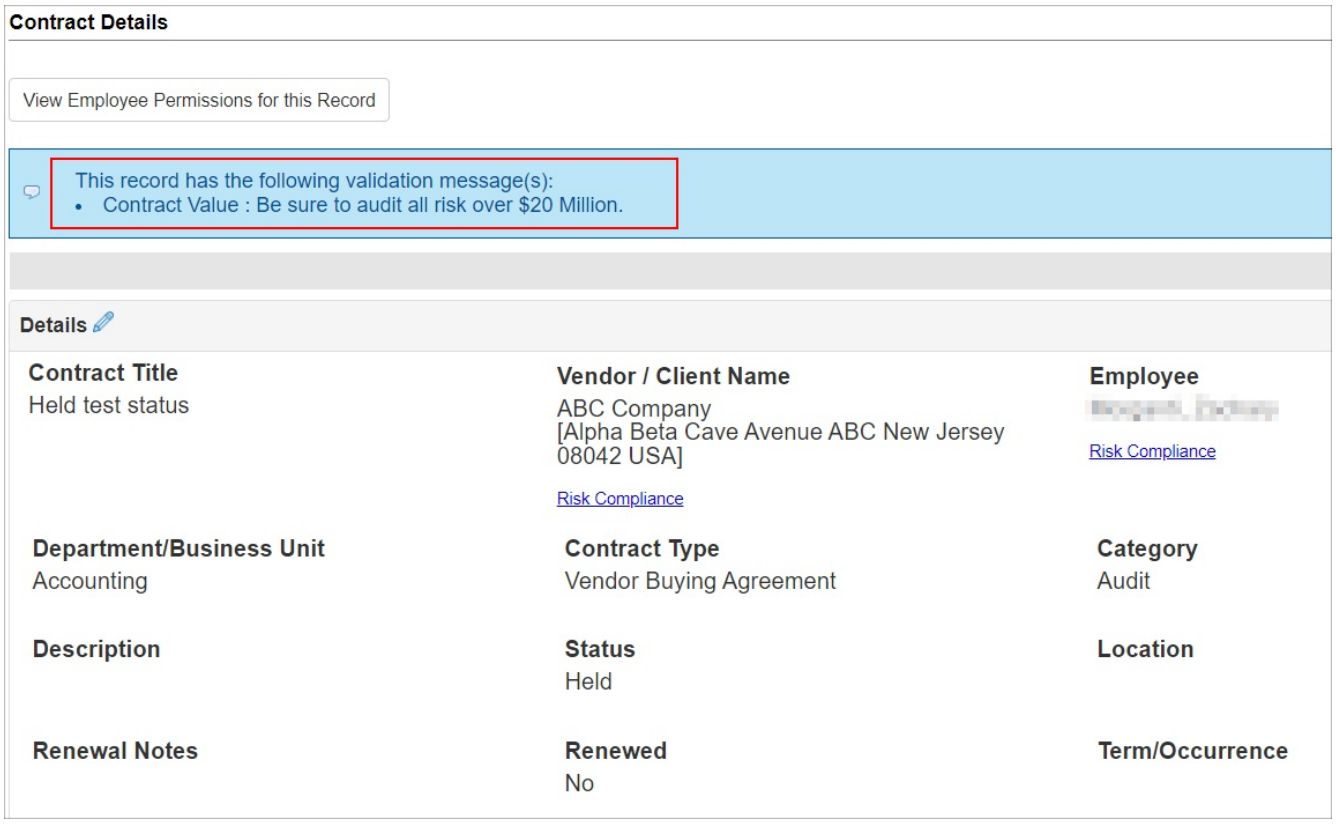
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10. Click **Save Alert**.

Testing

We can test our configured alert by viewing a Contract Record and set the **Contract Amount** over 20,000,000.00. The on-screen risk alert is displayed because the contract value is 20,000,000.01.



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Workflow Visualizer

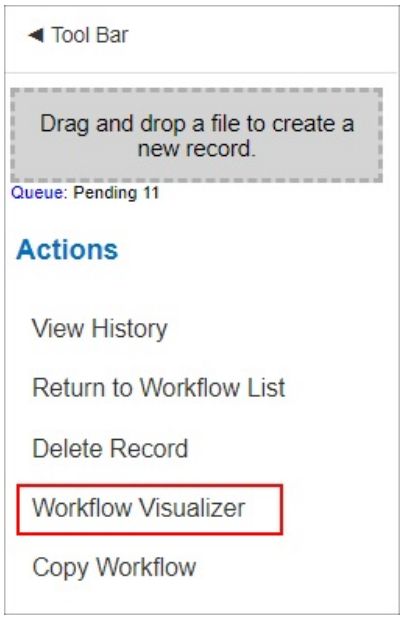
Workflow Visualizer

Workflow Management: Visualizer

Contract Insight offers an easy means of viewing relationships among workflow tasks. With the **Workflow Visualizer**, administrators can view relationships, one workflow step at a time to help assist with planning, review, and troubleshooting of workflows.

Accessing the Visualizer

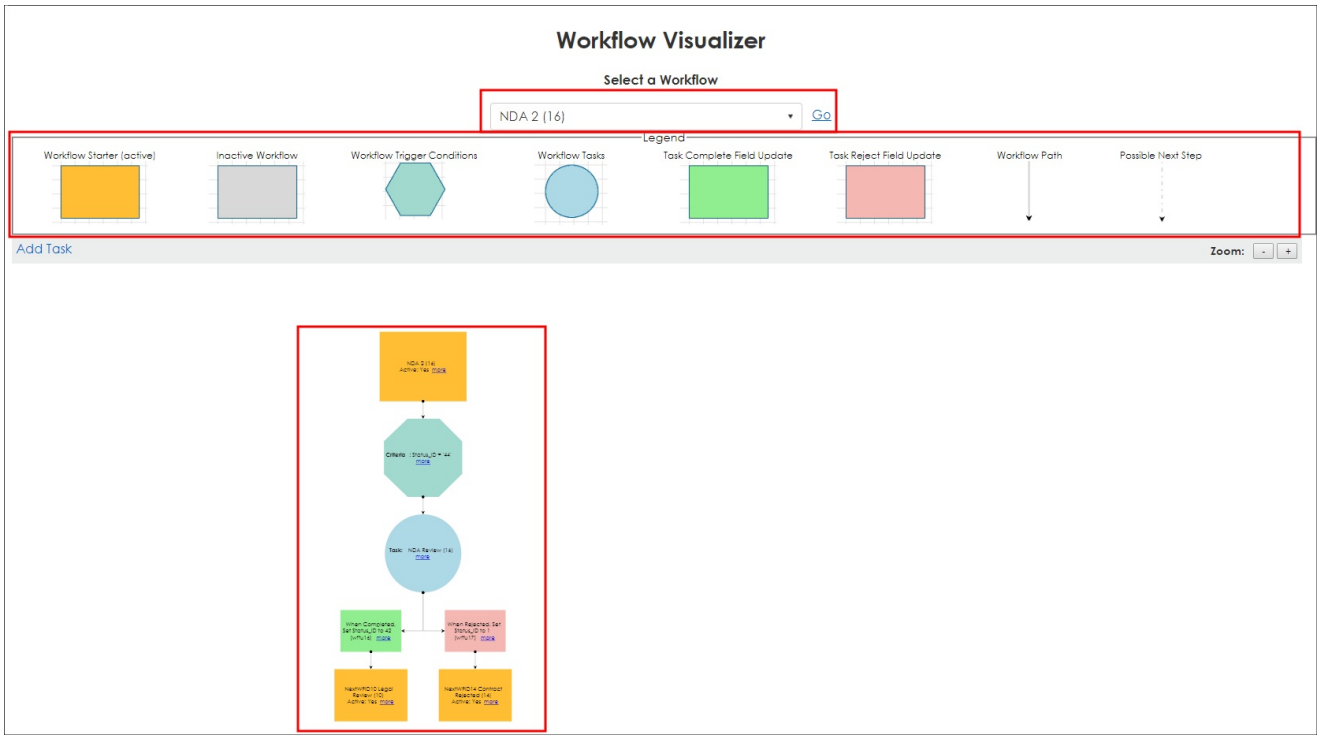
At the bottom of a workflow manager page, under the list of tasks, click **Workflow Visualizer**.



The visualizer page displays. It is broken onto three areas:

- **Workflow Selection:** navigate to different workflow steps with the drop-down menu.
- **Key:** Descriptions of what each shape/colour means
- **Workflow flowchart:** The flow, in order, of items within the task – the workflow itself, conditions, tasks, and actions upon completion and/or rejection of the task.

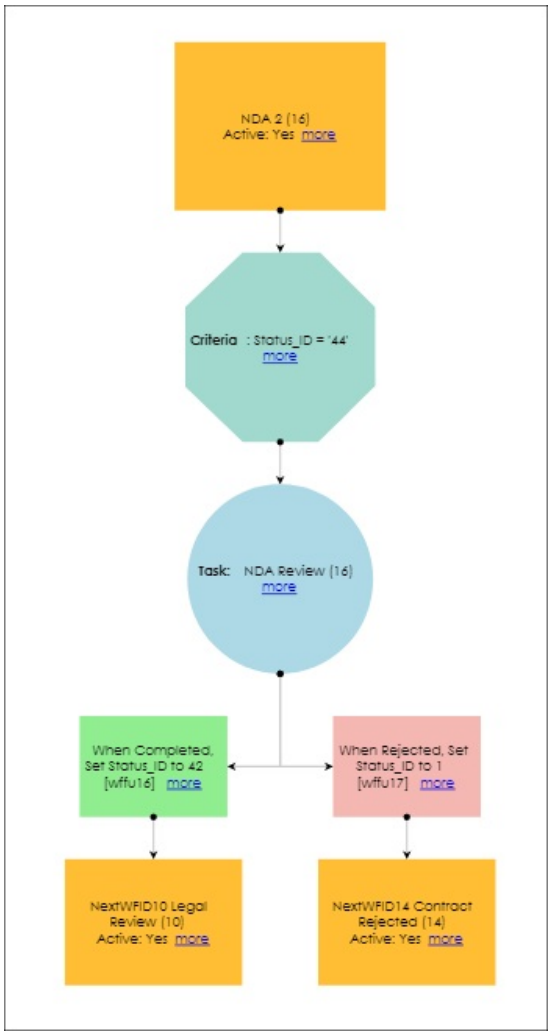
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Using the Workflow Flowchart

Each item in the flowchart contains some relevant details about the step and a **More** link. The links direct the user to the portion of a workflow or the related workflow (for workflow starters following task update items). Click **More** to view the area relevant to that step.

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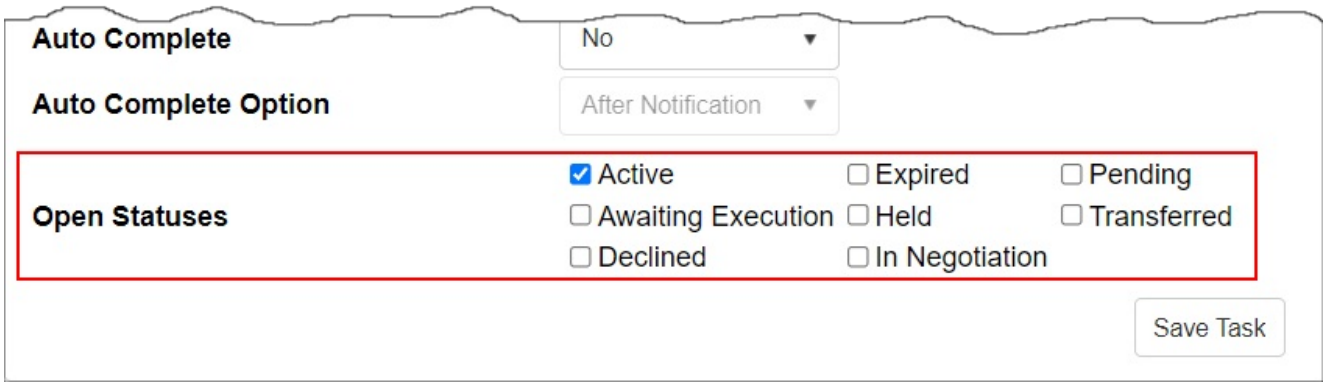
Open Statuses

Open Statuses

Open Status Values

While a default for all tasks in a given module can be set on the **Manage Task Statuses List** page, if a status value is to keep a task open or close it can be set on the **Manage Workflow Configuration** page - on the **Tasks** tab.

When Editing an existing Workflow Task, an additional area labeled **Open Statuses** displays toward the bottom of the page. Mark the tick-box for each option to have it keep the task open when selected.



Note: Status values in your system may differ from those pictured above.

By default, changing the task status will mark the task as complete. The option can be used to prevent a task from being marked as complete for one or more *user defined statuses*. This could be used to mark as task as **on hold** thereby removing it from reports or dashboards without completing the task. *This option is ignored if field updates are associated with the status.*

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Open Task Pop-Up

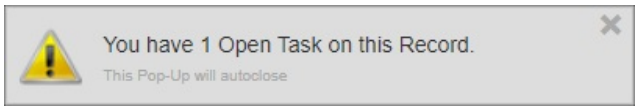
Open Task Pop-Up

Open Task Pop-Up Message

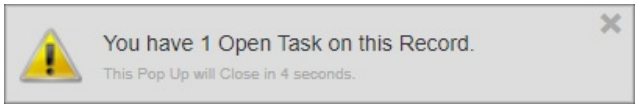
As an additional point of reminder, optionally, CobbleStone can display a pop-up message that displays for a limited amount of time to remind the current user they have one or more open tasks on the record being accessed.

Pop-Up Message

When the record loads, if the active user has open tasks, a pop-up message displays.



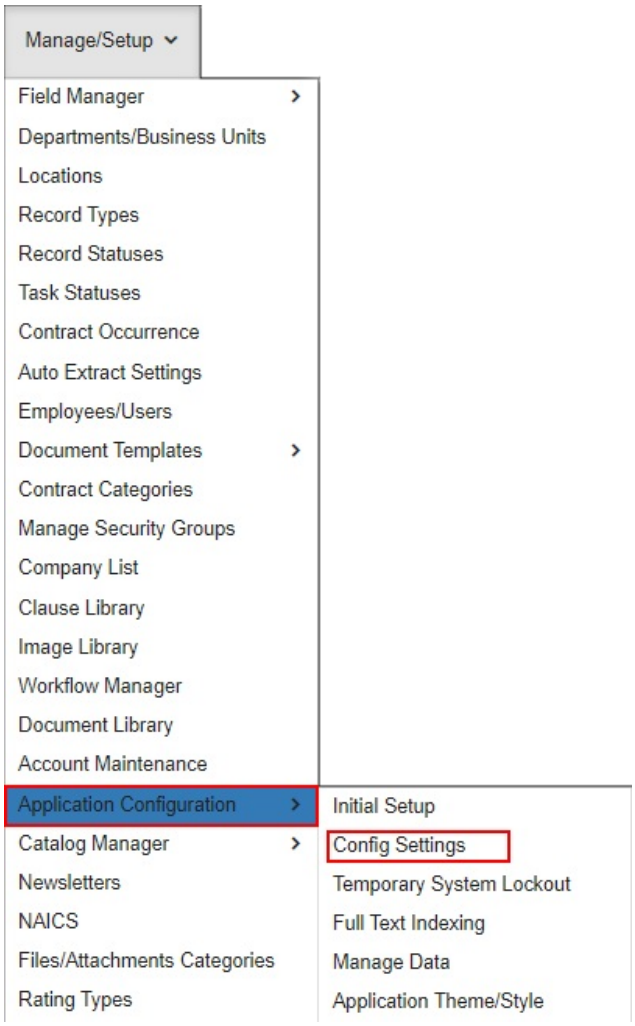
The user can close the pop-up message or wait for it to disappear on its own.



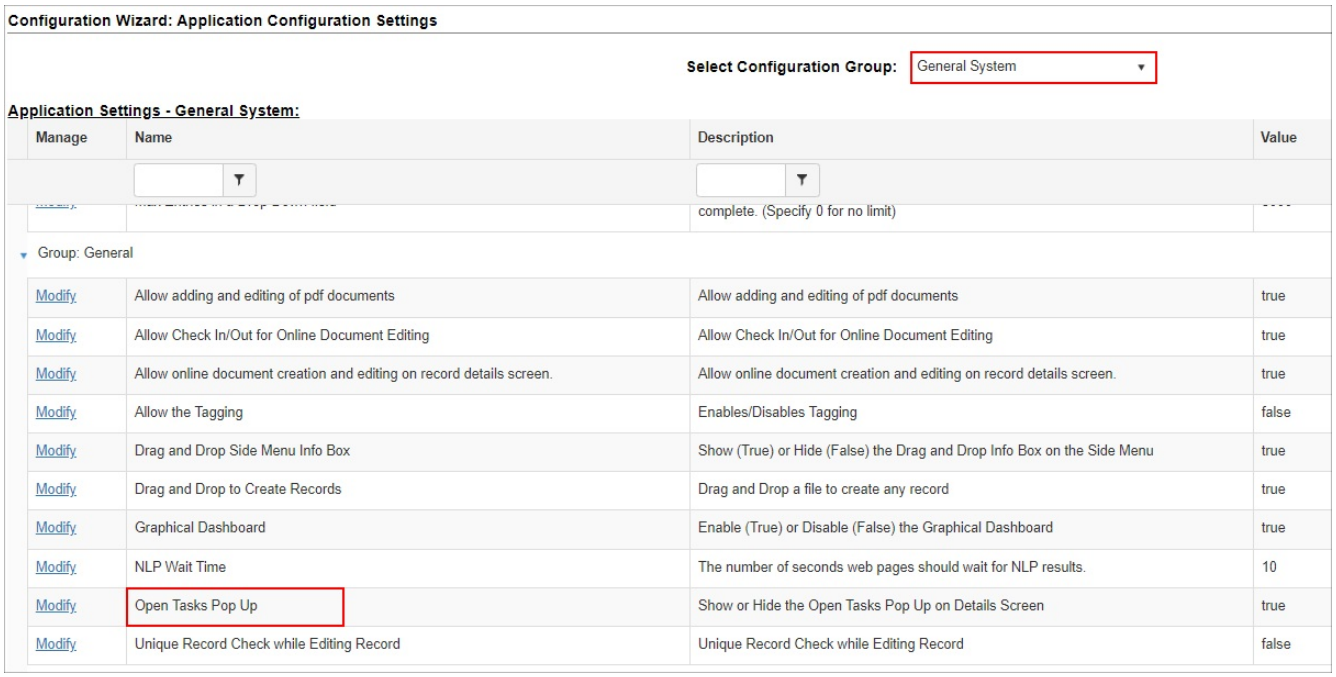
Pop-Up Message

1. Log in as system admin user and navigate to **Manage/Setup - Application Configuration - Config Settings**.

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2. Open the **General System** Configuration Group.



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3. Find the **Open Task Pop Up** setting.

4. To enable the pop-up, click **Modify** and set the value to True.

Note: By default, the **Open Tasks Pop Up** setting is set to False so the pop-up message do not display.

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Workflow History

Workflow History

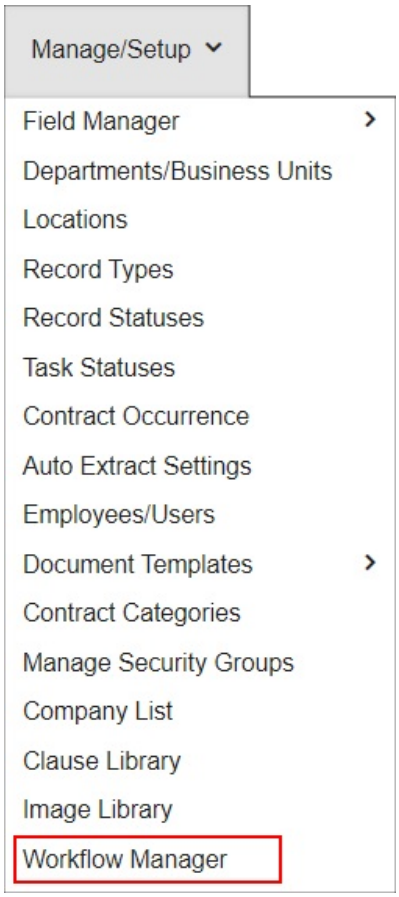
Workflow History

Changes to workflow can be important to track if a task is not operating as expected. By navigating to the task in the workflow manager, such history can be viewed.

Note: the menu, the task list, and task details may differ in your system. The items below are for example purposes only.

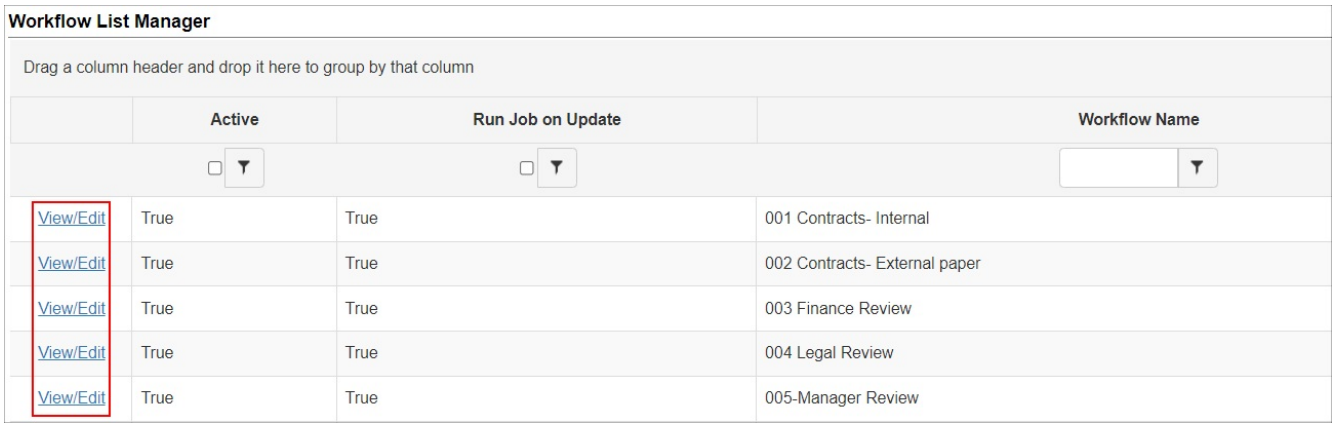
Viewing the History

1. Navigate to the Workflow Manager via **Manage/Setup** - **Workflow Manager**.



2. The Workflow List Manager page displays. Click **View/Edit** for the desired workflow

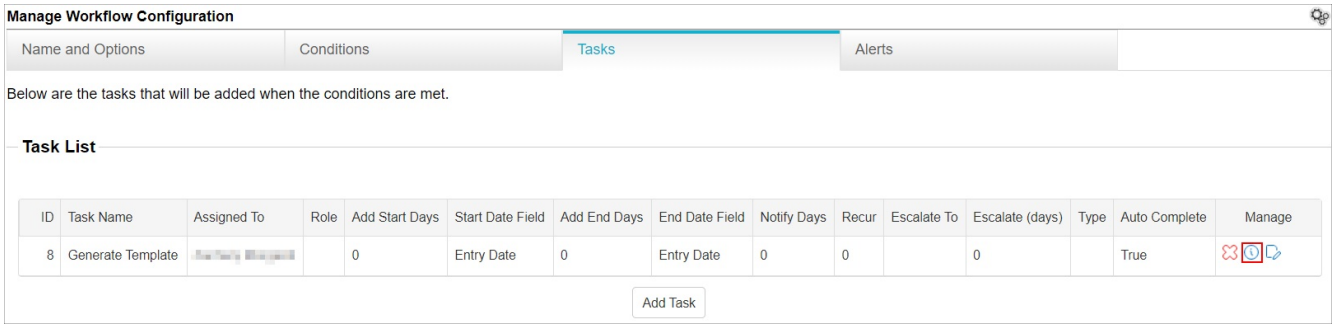
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3. The Manage Workflow Configuration page displays. Click **Tasks**.

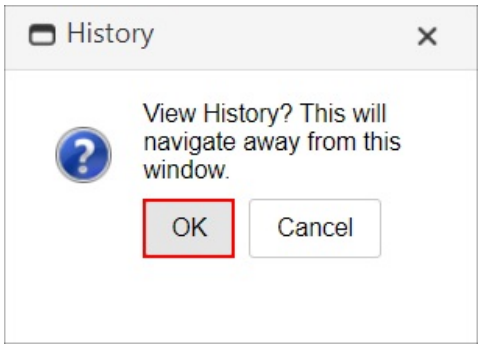


4. The Task List displays. Click the I ( ) icon on the right-hand side.

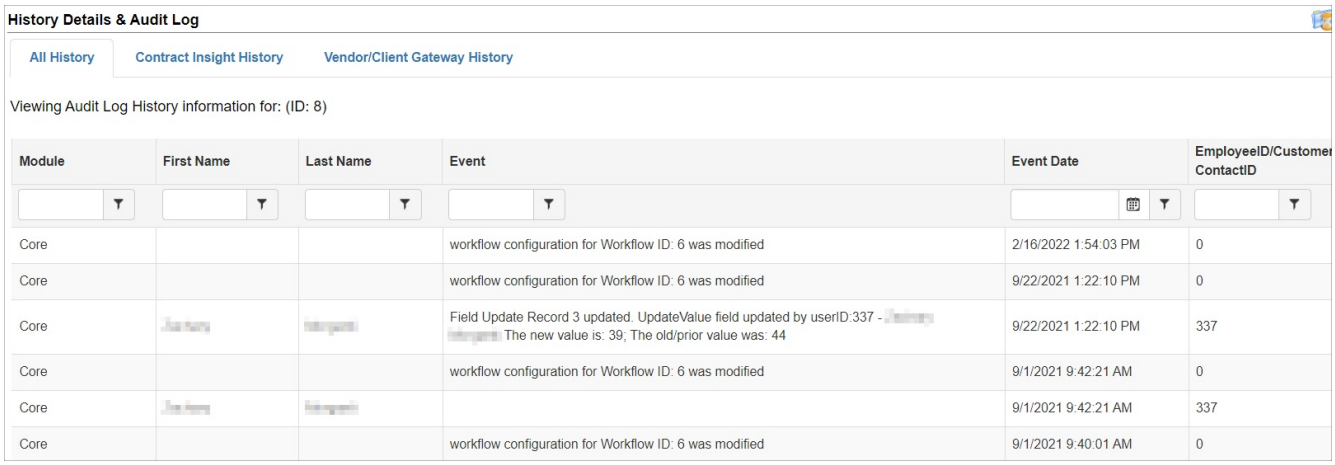


5. A warning pop-up displays. Click **OK** to proceed to the history details & audit log for the selected task.

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6. The history details and audit log displays.



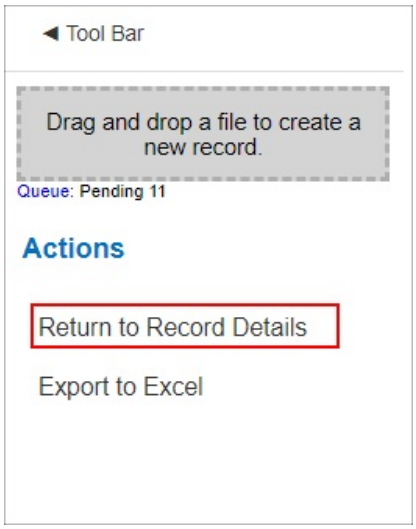
Each line item displays:

- The module for the task
- The first name of the user who access the record or made the change
- The last name of the user who accessed the record or made the change
- Details regarding the event
- The event date and time
- The ID of the user who accessed the record or made the change
- The task ID
- The table for the task (not pictured above)

Return to the Task

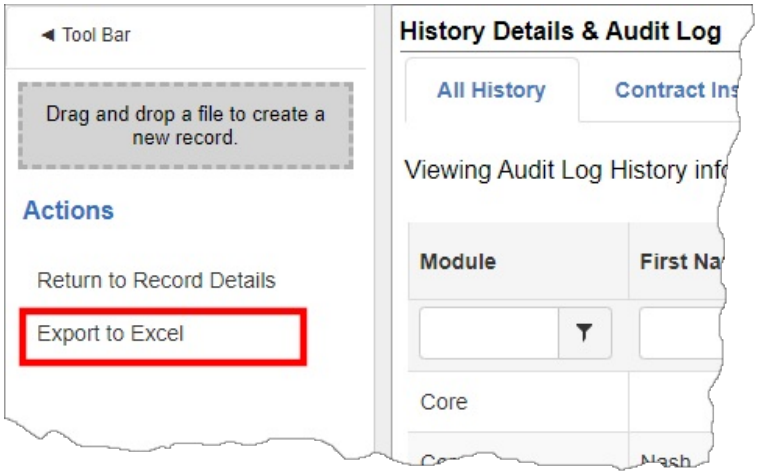
1. To return to the task, on the side menu of the history details & audit log page, click **Return to Record Details**.

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Export the History and Audit Details

1. To return to the task, on the side menu of the history details & audit log page, click **Export to Excel**.



2. The file downloads through your web browser. Open the file, click to allow modifications, and work with the data as needed.

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Auto-Generate Template Document

Auto-Generate Template Document

Manage Document Package Templates: Adding a New Template

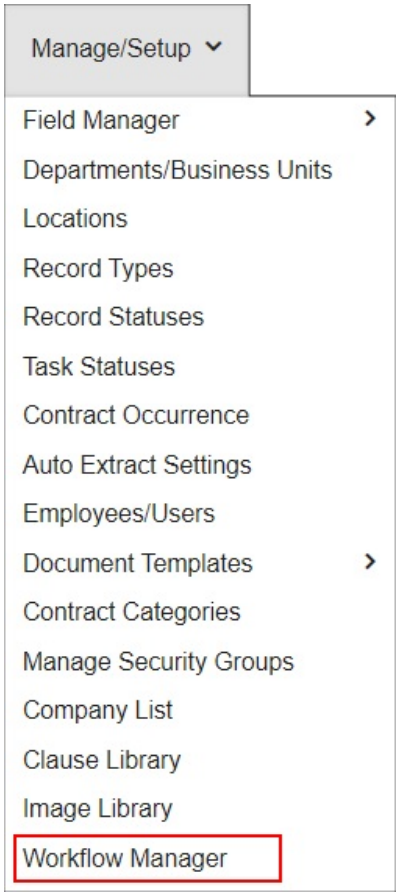
Note: The menu, workflow, and documents pictured below may differ from those in your system. The items pictured are for example only.

Create the Template

Create a template for a document by following the rules outlined here: CobbleStone Templates.

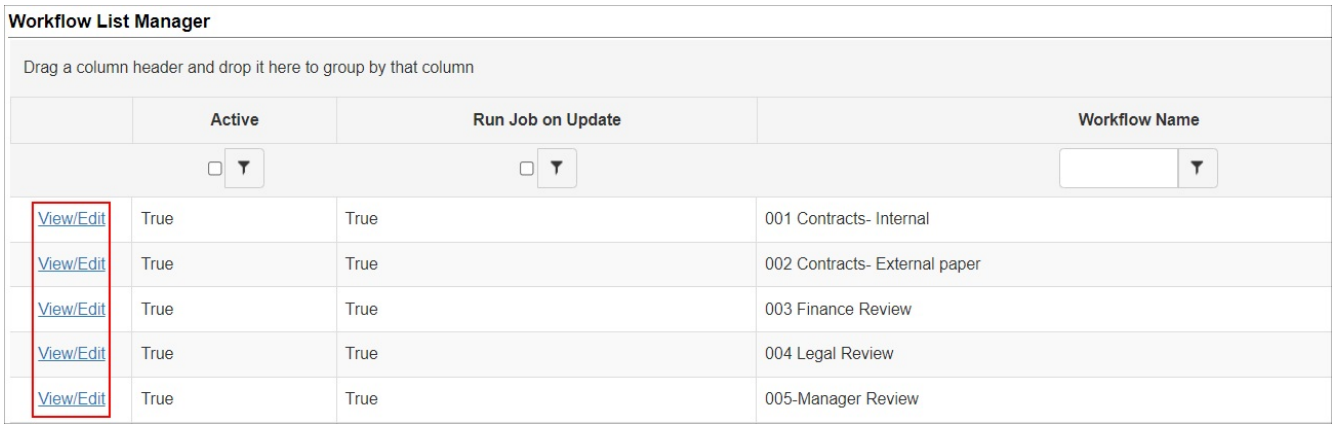
Edit the Desired Workflow

1. Navigate to the workflow manager via **Manage/Setup - Workflow Manager**.

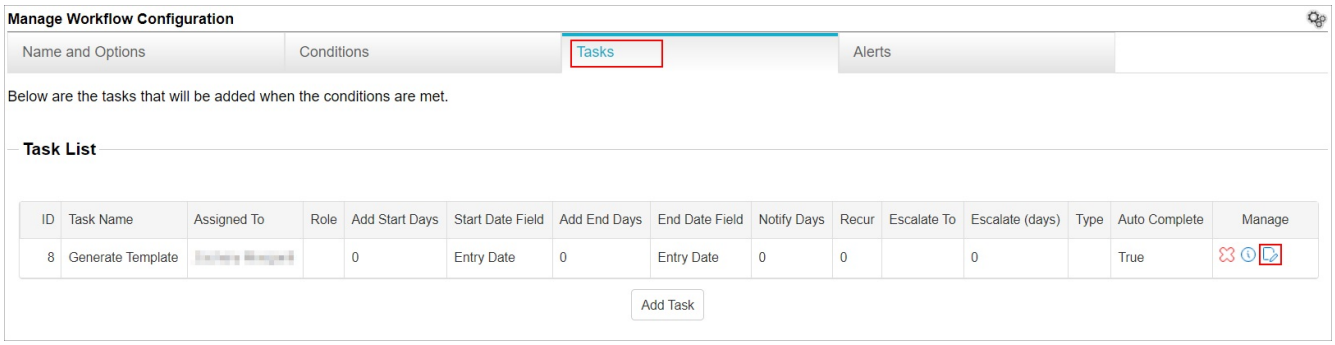


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2. Click **View/Edit** for the workflow from which to trigger the creation of the document. If needing to create a new workflow, please follow the steps outlined here: CobbleStone Advanced Workflow.



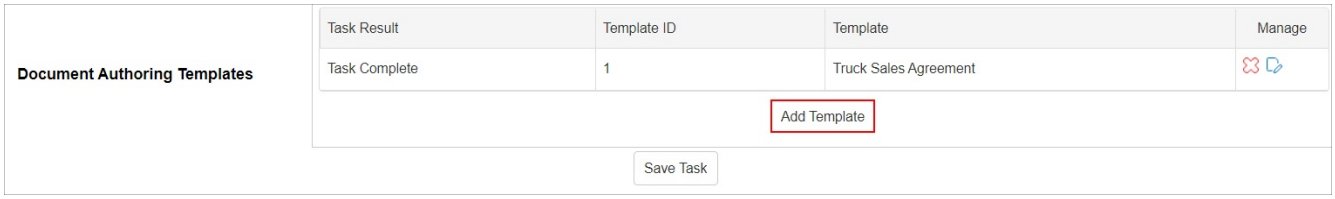
3. The Manage Workflow Configuration page displays. Click **Tasks**.



4. Click the **paper and pencil/edit icon** ( ) to edit the task.

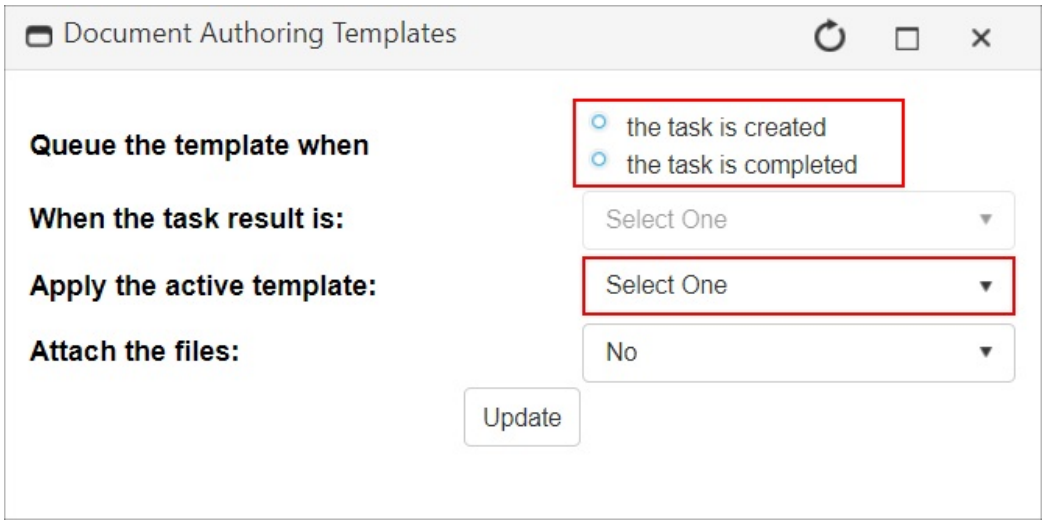
5. The task's details display. Scroll down the page.

6. Click **Add Template**.



7. A pop-up window displays. Select if the document (which has not yet been selected) is to be created when the task is created or when the task is completed.

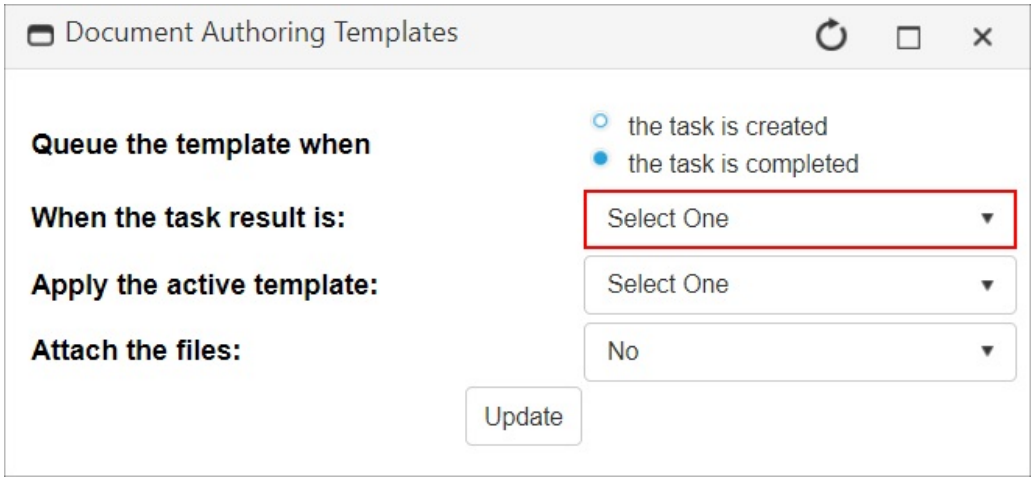
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8. From the **Apply Template** field, select the template from which the document is to be created.

9. Click **Update**.

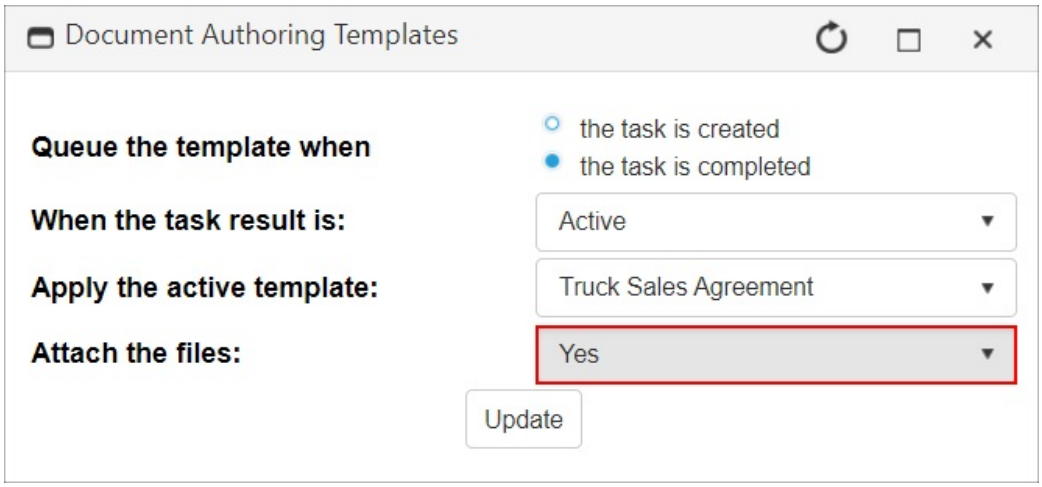
Note: If the document is to be created upon completion of the task, a new option is available. Select the applicable task status from the **When the Task Result Is** field.



The list is populated with all entries on the Task Status table for the assigned table/module.

Note: The template may be deposited into the Files & Attachments area on the record if generated through a workflow. To do this, after all else has been updated as necessary, change **Attach the Files** to **Yes**. All document packages generated via this workflow with the chosen settings will be deposited automatically.

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Audit Logging

Audit Logging

Searching & Reporting: Audit Logging

Contract Insight includes an audit log that tracks system activity. Typical events that are tracked are:

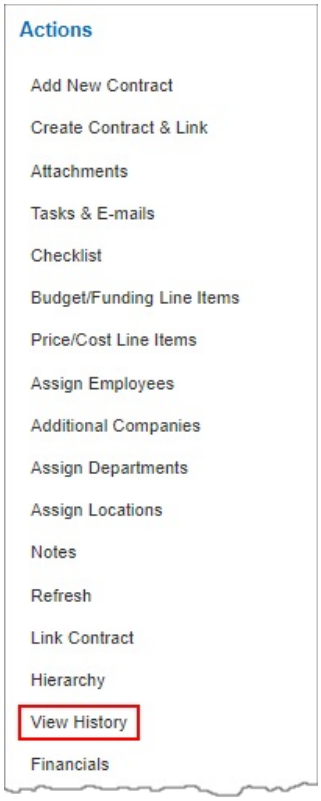
- Who logged in when
- Failed log in attempts
- Standard record actions (creation, updates, deletes)
- Tracking users that view contract records and documents
- Tracking attached documents and/or files
- Tracking the viewing of attached files and/or documents
- Tracking e-mails sent via the one-off e-mail function available on the Contract Record Details
- Tracking e-mails sent via the Task E-Mailer Job
- Tracking changes to field values (before and after snap-shots)
- And much more...

The audit log tracks changes and audit history down to the user, record, and field level with history tracking. The system tracks original values, dates/times, and employees that changed field data.

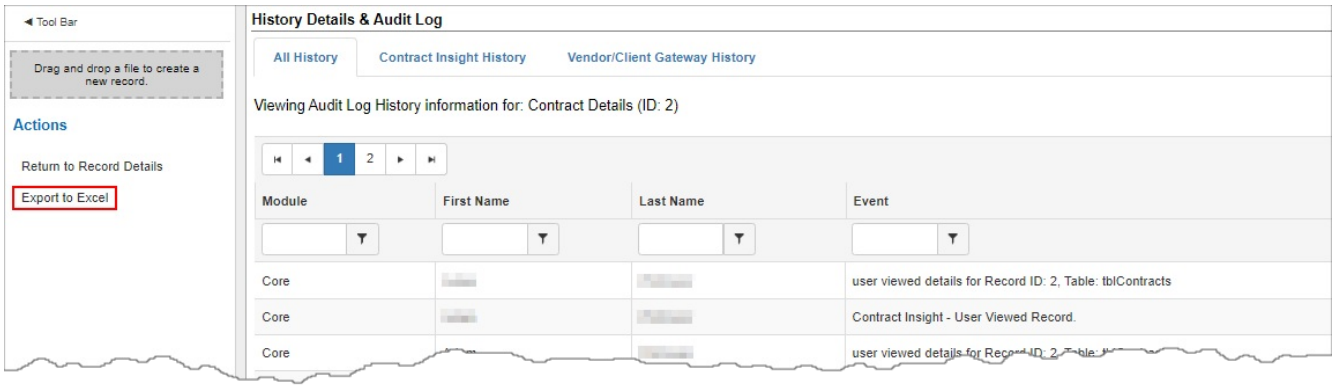
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Audit and History Log for an Individual Record

Standard End-Users may view an individual records history via **View History** on the side menu of many of the detail record pages. Below is an example of the **View History** for the contract details screen.

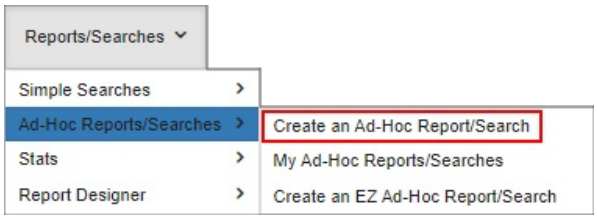


After clicking the **View History**, the system displays a listing of audit events for the record. The history log can be filtered and sorted by column header (include name, date, event text) and exported to a spreadsheet.

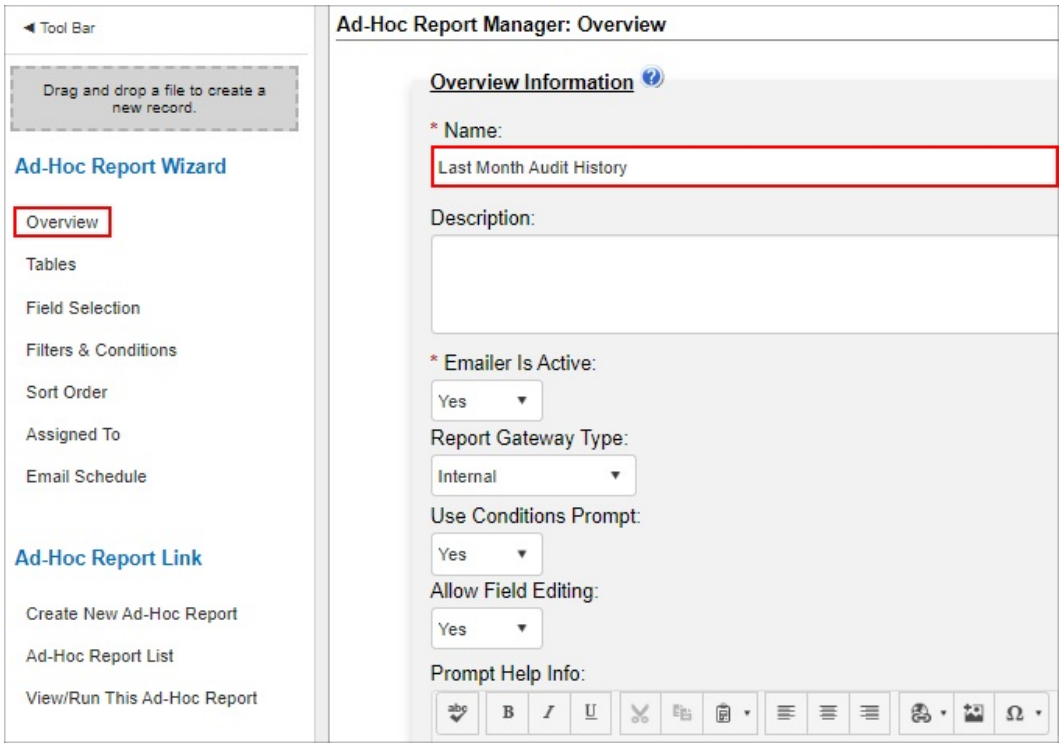


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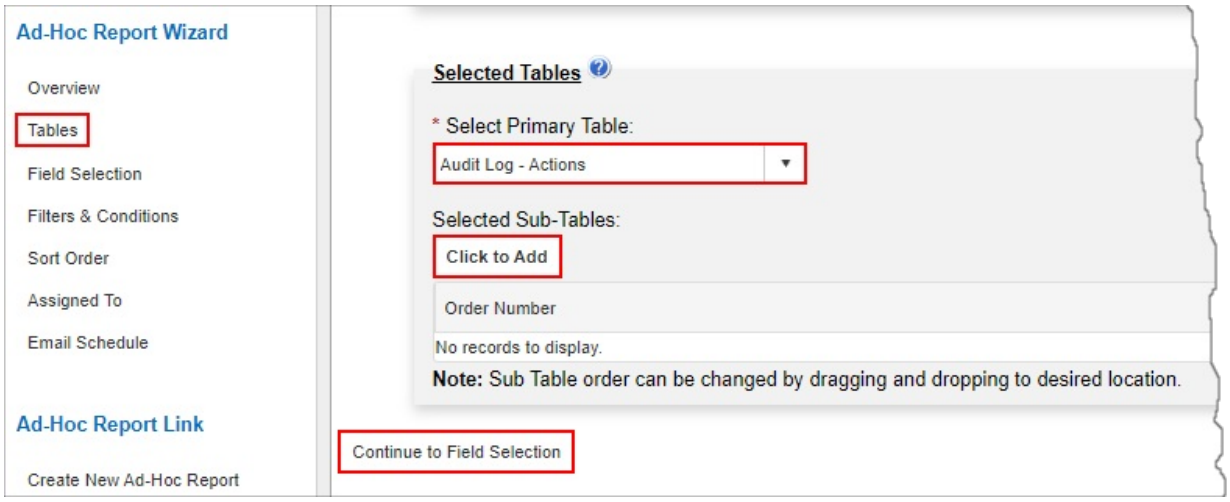
System Wide Audit Log



Contract Insight Enterprise offers a system wide view and analysis of the audit log. Authorized Administrator and Super Users may create user-defined searches (queries) that enables the analysis of audited events system-wide. The audit log is found by creating an ad-hoc search (report) from the **Reports/Searches** menu. [This section does not cover how to create complex ad-hoc searching, however it does cover a basic log file search.]

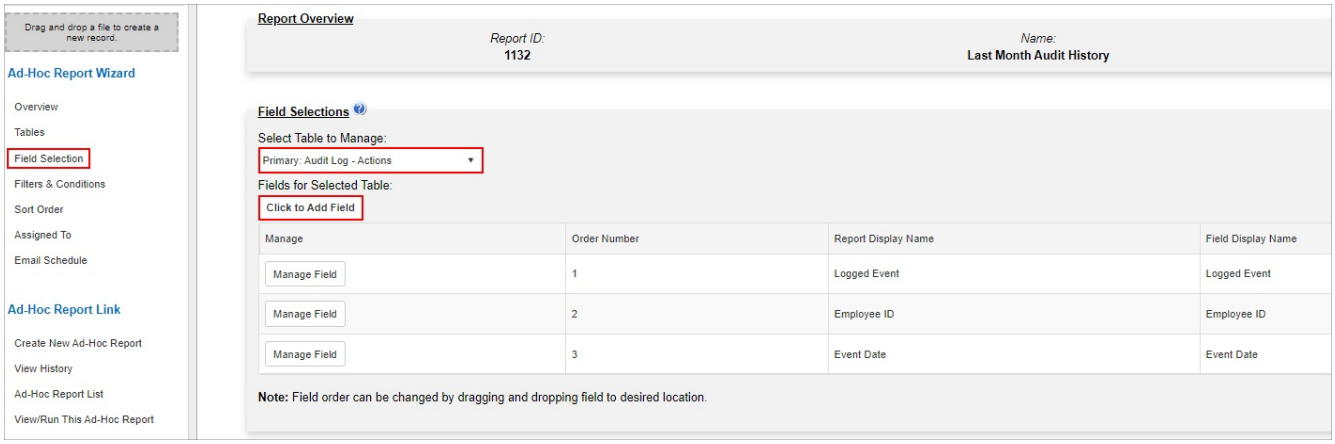


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Click **Save and Continue**.

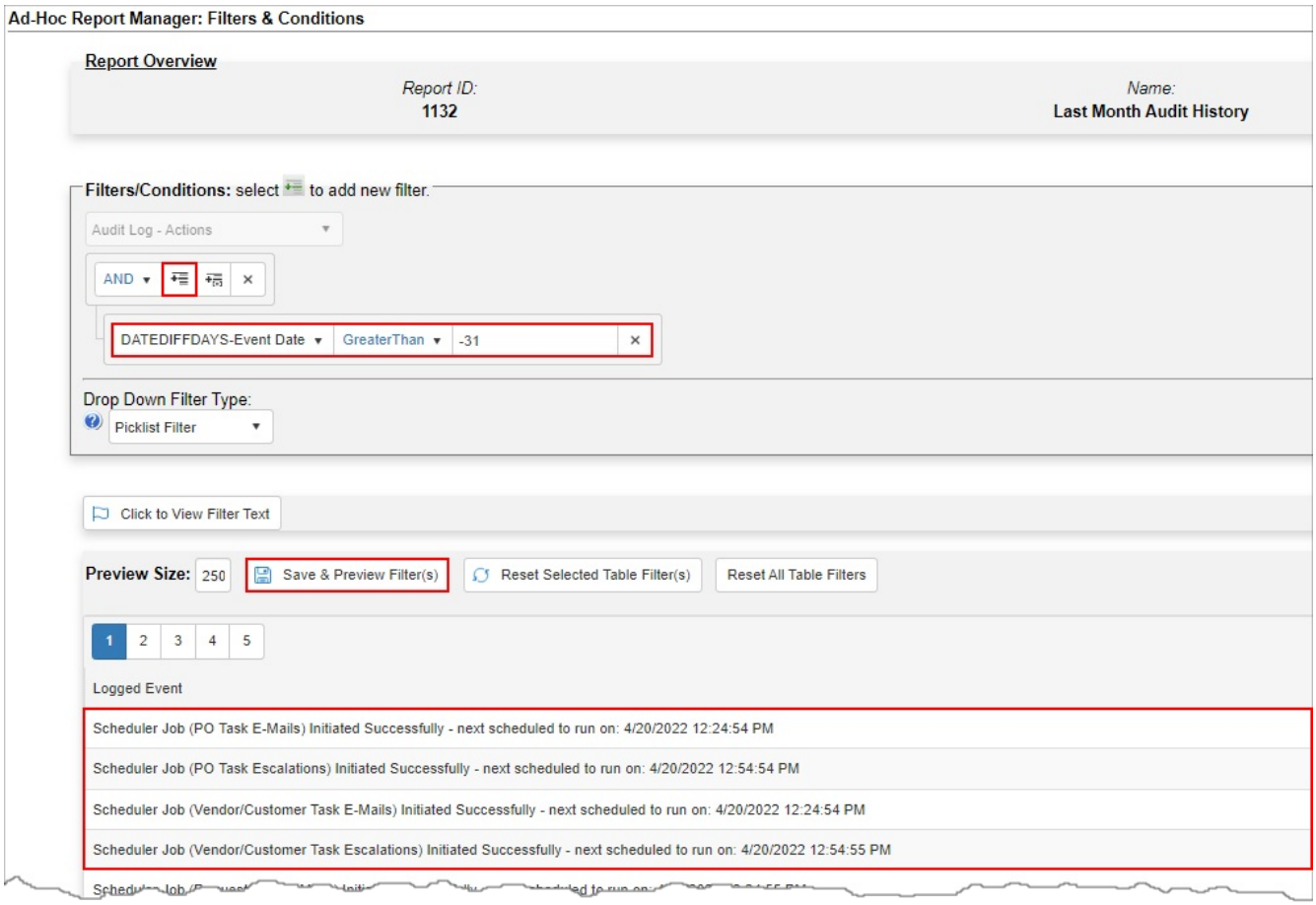
The system displays the **Ad-Hoc Report Manager: 2. Field Selection screen**. We selected the Employee First Name, Last Name, Event text, Date, Days until Event Date, and the Table on which the event happened.



Click **Save Field Selections**.

Next, select **Filter & Conditions** to set our criteria. In this example, we are going to filter by **Days Until Event Date** is **greater than -30** (since the event is a historic event and took place in the past we use a negative value for this condition).

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Once we save or Filter conditions, the rows are displayed.

We can re-run this report at any time and filter and/or export it by navigating to **Reports/Searches** > **Ad-Hoc Reports/Searches** > **My Ad-Hoc Reports/Searches** to open a list of all of the Ad-Hoc Reports/Searches created.

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Online Report Designer

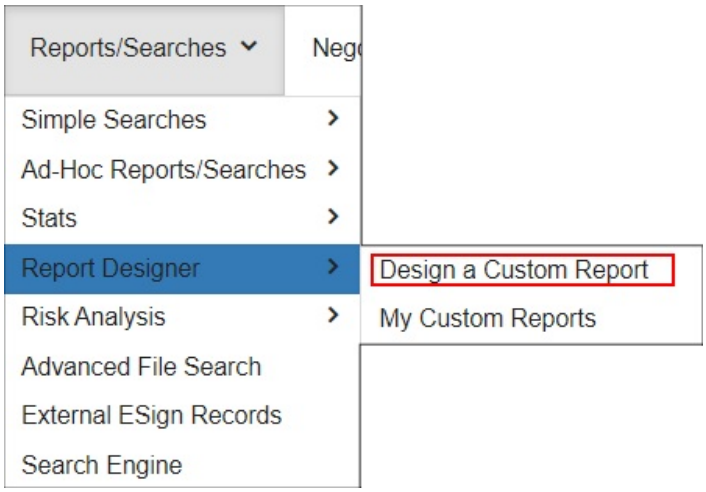
Online Report Designer - Insight Reporter

Searching & Reporting: Online Report Designer (Insight Reporter)

Contract Insight has a fully customizable, online report designer that offers users complete control over the appearance, layout, and information on each report. The drag and drop report designer feature is very similar to the functionality found in other 3rd party reporting tools such as Crystal Reports, Business Objects and Cognos. This report designer can greatly improve upon the appearance of simple canned-reports and allow users to create very complex, technical reports that include text, images, graphics, variables, conditions, cross-tables, multiple data summary options, and much more. With numerous exporting options including Word, Excel, PowerPoint, PDF, CSV, Rich Text, Image formats, and many more, CobbleStone Systems Custom Report Designer offers robust querying and reporting capabilities.

Create a Custom Report

Navigate to **Reports/Searches** > **Report Designed** > **Design a Custom Report**.

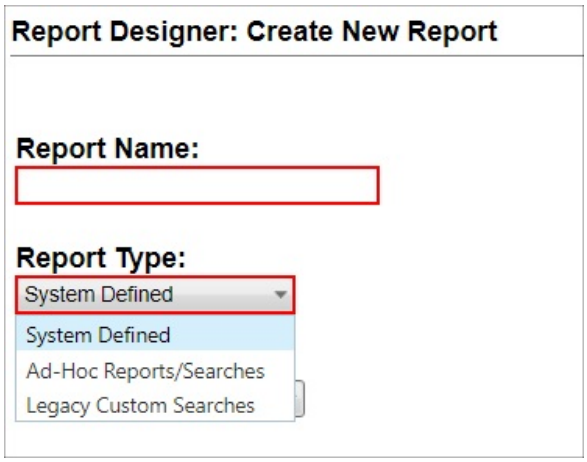


To create a new Report Designer, first provide the name of the Custom Report.

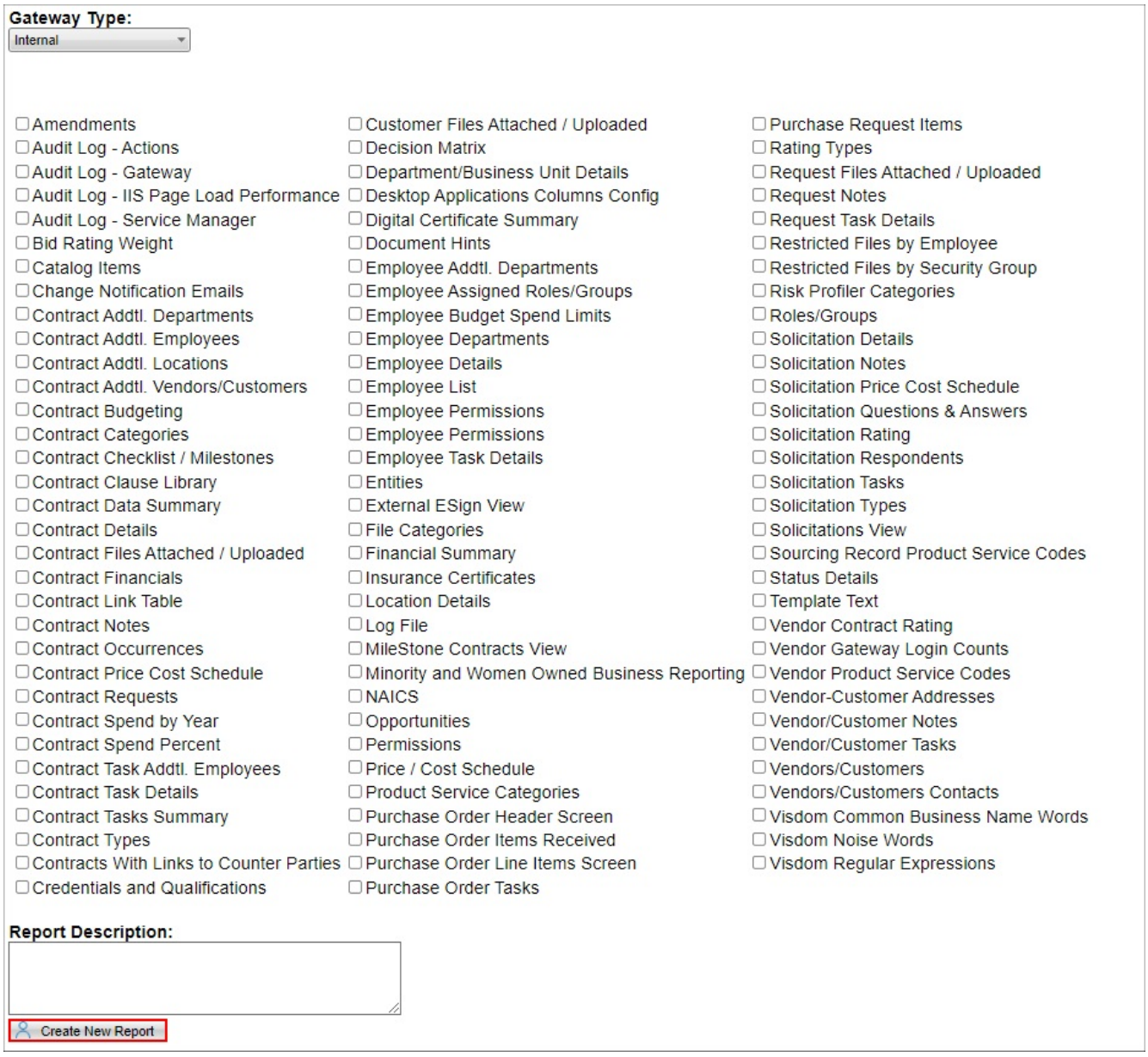
Next Select the type of report data to with which to work.

- **System Defined**
    - The standard reporting areas of the application.
- **Ad-Hoc Reports/Searches**
    - List of all created ad-hoc reports within the application.
- **Legacy Custom Searches**
    - List of all created legacy custom searches within the application.

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a. **System Defined** checklist (select as many as desired).



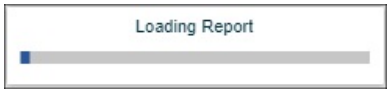
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b. **Ad-Hoc Reports/Searches** and **Legacy Custom Searches** will display all of the reports/searches created/defined in the application for each. As many as desired can be selected.

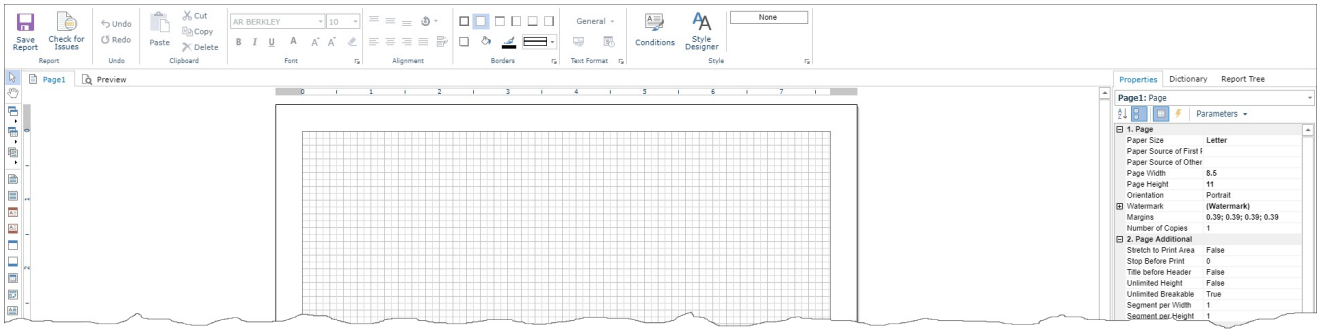
Provide a description for this report (if necessary). Once all of these pieces are completed you are ready to generate a new report designer.

To generate a new report designer, click **Create New Report** to generate and load the Online Report Builder interface.

The online interface will load.

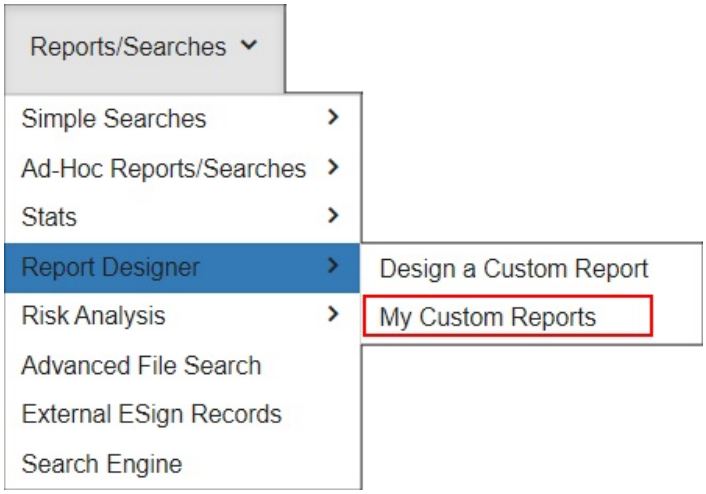


Once the Report Builder interface has loaded, the Report Builder is available for use:



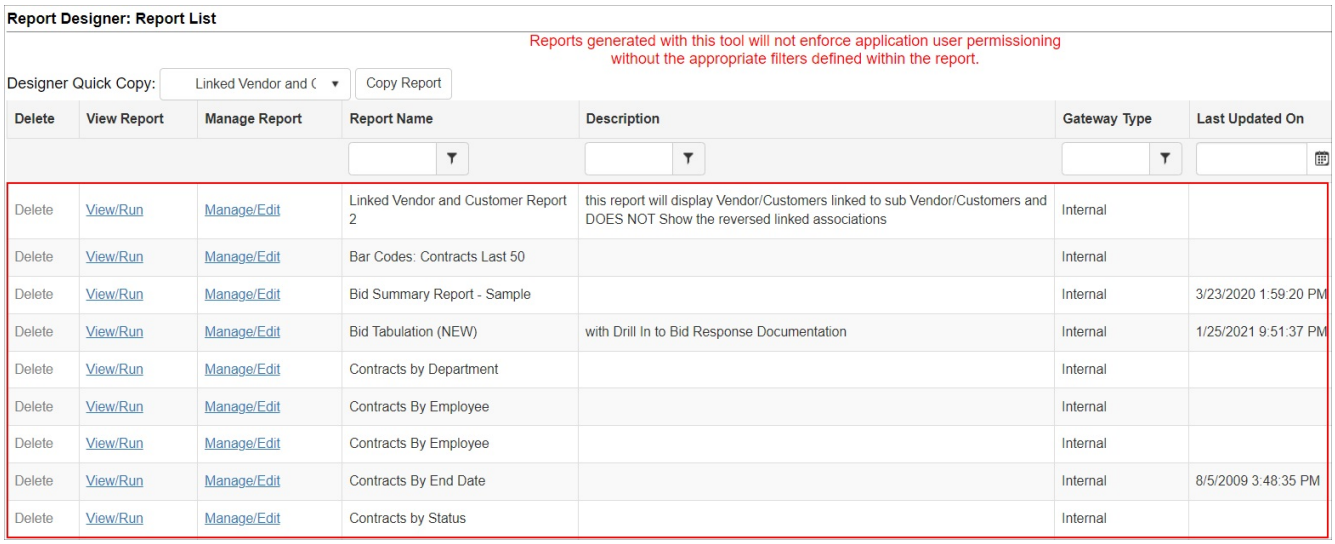
My Custom Reports

An Administrator can create report builder reports and assign users the appropriate permission to view and execute the reports. The reports display under **Reports/Searches > Report Designer > My Custom Reports** list for the user(s).



All custom searches assigned to the user will be displayed.

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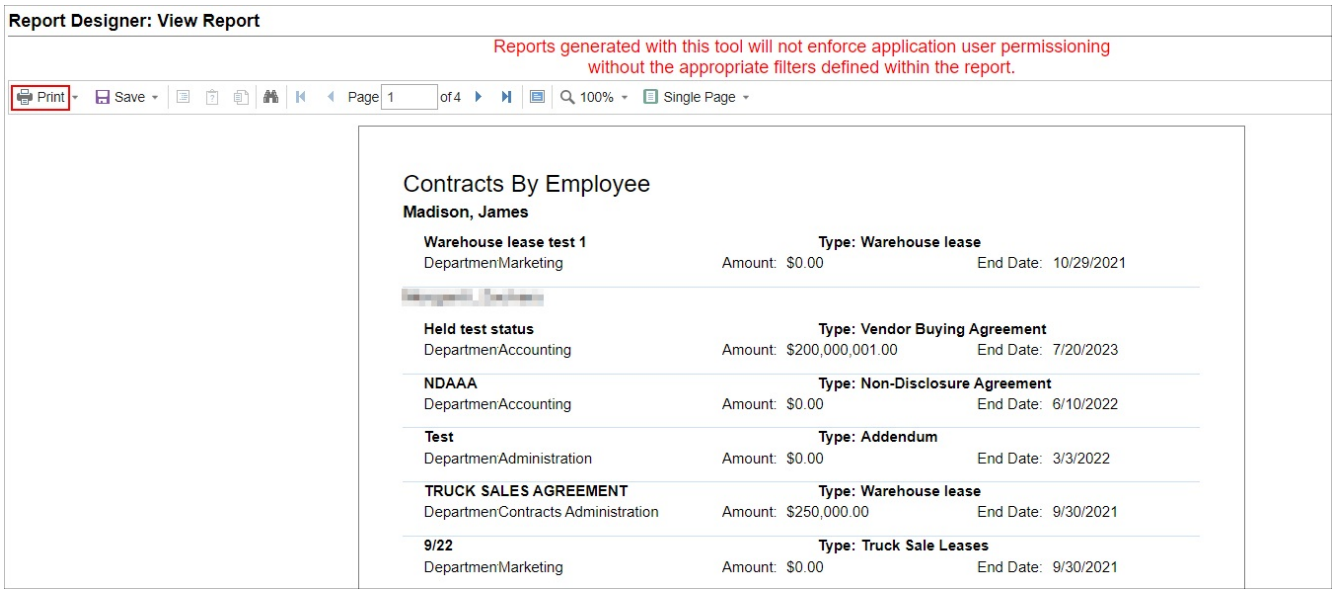


Viewing/Exporting Report Builder Reports

The user can view the Custom Report by clicking **View/Run** for the desired report.

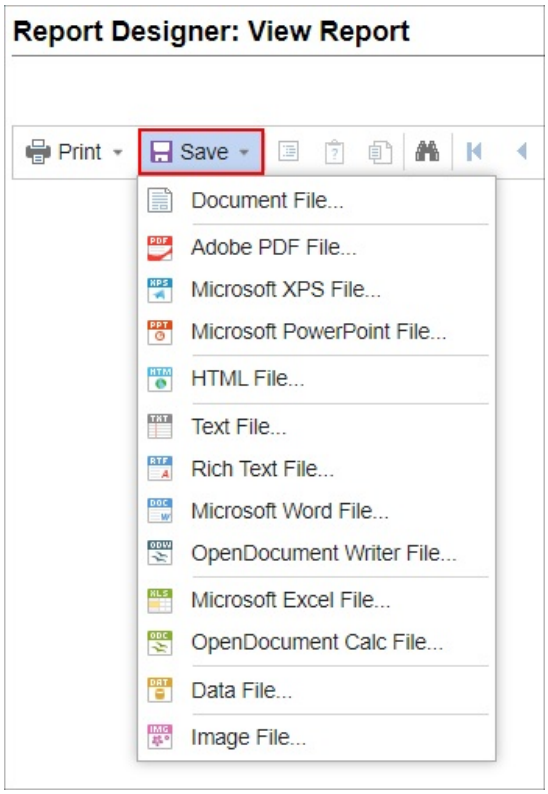
The report will be displays within the black outlined box (with the ability to page through the results).

The report can be printed directly from the page by clicking on the **Print** icon.



The report can also be exported into a variety of file formats by selecting the **Save** icon and specifying the export format.

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Quick Stats Analysis

Quick Stats Analysis

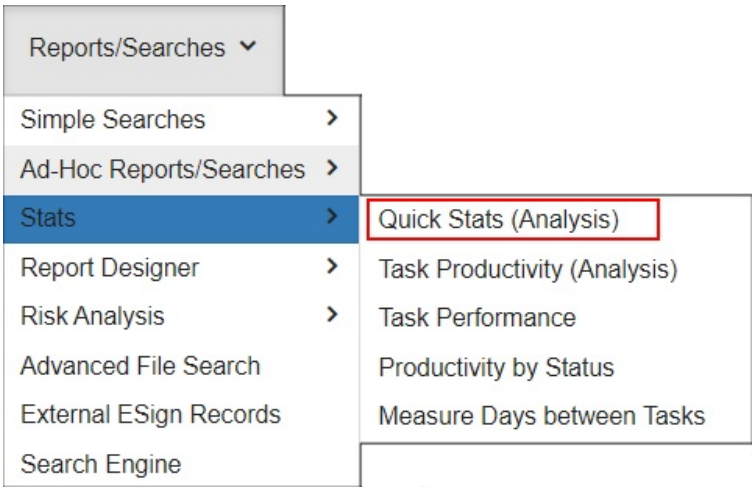
Searching & Reporting: Quick Stats Analysis

Contract Insight Enterprise supports the ability to perform statistical analysis of contract data. This includes viewing the following items by contract grouping items:

- **Maximum Amount of Contracts** (based on Contract amount fields)
- **Minimal Amount of Contracts** (based on Contract amount fields)
- **Average Amount of Contract** (based on Contract amount fields)
- **Total Count of Contracts**
- **Standard Deviation of Contract Amounts** (Standard deviation is a widely used measurement of variability or diversity used in statistics)

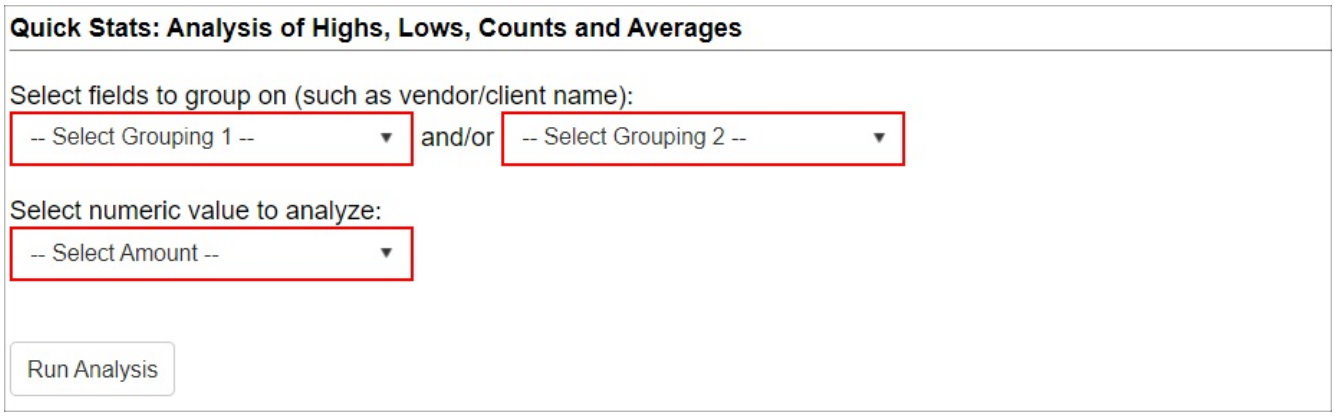
Perform Quick Stats Analysis

1. Log into the system as an Application Administrator and navigate to **Reports/Searches** > **Stats** > **Quick Stats (Analysis)**.

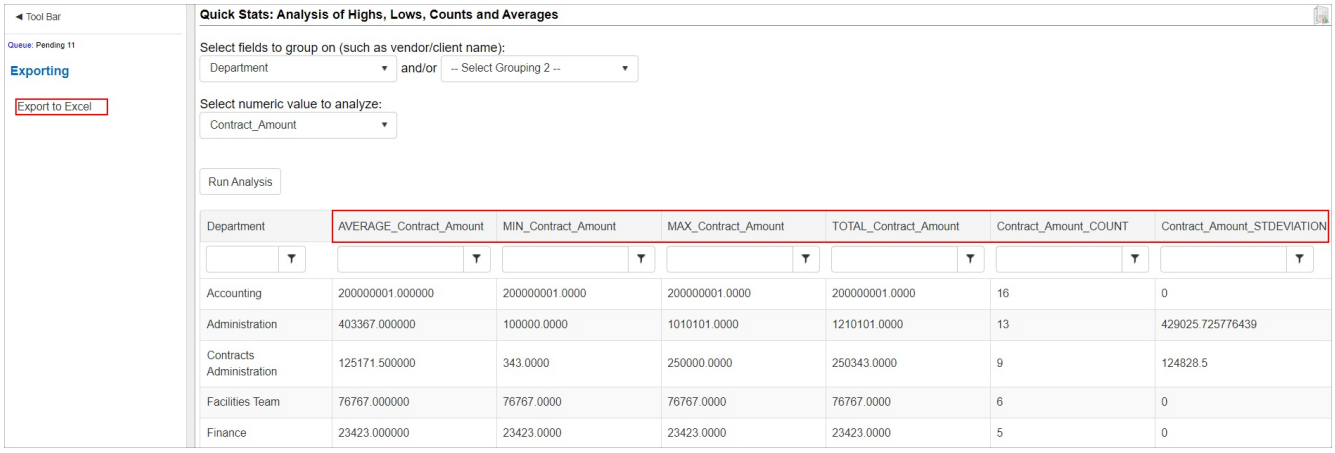


2. The **Quick Stats** screen displays.

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1. **Select the primary fields to group on** (optionally, it can sub-grouped).
2. Next, **select the numeric value to analyze**.
3. Click **Go**.
4. The results display.



Department	AVERAGE_Contract_Amount	MIN_Contract_Amount	MAX_Contract_Amount	TOTAL_Contract_Amount	Contract_Amount_COUNT	Contract_Amount_STDEVIATION
Accounting	200000001.000000	200000001.0000	200000001.0000	200000001.0000	16	0
Administration	403367.000000	100000.0000	1010101.0000	1210101.0000	13	429025.725776439
Contracts Administration	125171.500000	343.0000	250000.0000	250343.0000	9	124828.5
Facilities Team	76767.000000	76767.0000	76767.0000	76767.0000	6	0
Finance	23423.000000	23423.0000	23423.0000	23423.0000	5	0

Optionally, the data can be exported to Excel by clicking **Export to Excel**.

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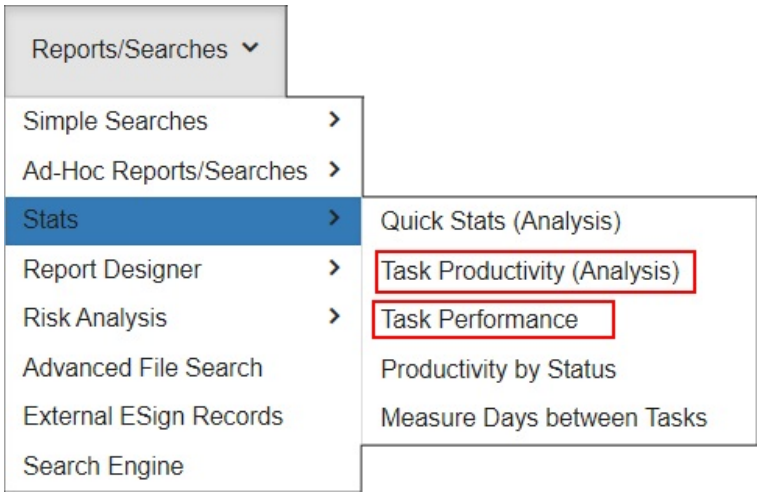
Task Productivity Analysis

Task Productivity Analysis

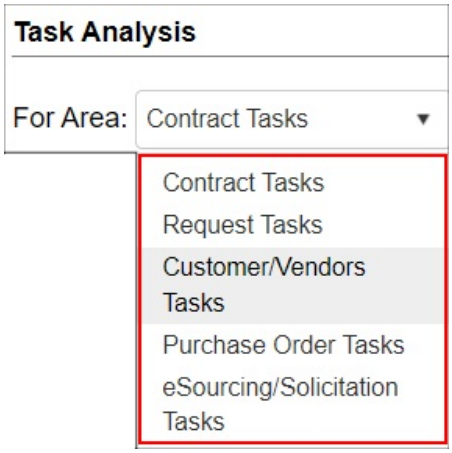
Searching & Reporting: Task Productivity Analysis

The Task Productivity tool located within the **Stats** menu provides an audit of all tasks (Solicitation & Contract), providing details on the task end date, the number of days within the prior task's end date to the task's completion date, whether the task was completed, the Task ID, and the **Contract_ID** that the task was for.

To access the **Task Productivity (Analysis)** or the **Task Performance** screens, navigate to **Reports/Searches** > **Stats** > **Task Productivity (Analysis)** or **Task Performance**.



The **Task Analysis** screen displays. Users can sort and filter the columns, Export to Excel, or view the Contract Record to which the task line item belongs to by clicking **View**.



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Task Analysis

For Area: Contract Tasks

	Days to Complete Average:	Vendor Name	Contract_Title	Task Name	Employee Name	Current Task Start Date	Current Task End Date	Current Task Complete Date
View	1	ABC Company	Workflow test	Start the process	[redacted]	8/30/2021 4:23:40 PM	9/2/2021 4:23:40 PM	8/31/2021 4:24:15 PM
View	1	ABC Company	Workflow test 3	Start the process	[redacted]	8/30/2021 4:28:18 PM	9/2/2021 4:28:18 PM	8/31/2021 4:28:32 PM
View	1	ABC Company	Workflow test 5	External	[redacted]	8/30/2021 4:38:42 PM	9/2/2021 4:38:42 PM	8/31/2021 4:38:55 PM
View	2	ABC Company	Workflow test 5	Manager Review	[redacted]	8/29/2021 4:38:42 PM	9/5/2021 4:38:42 PM	8/31/2021 4:39:01 PM
View	1	ABC Company	NDA 9/3		[redacted]	9/2/2021 2:58:17 PM	9/5/2021 2:58:17 PM	9/3/2021 2:58:38 PM
View	0	ABC Company	[redacted]		[redacted]	9/2/2021 3:47:33 PM	9/5/2021 3:47:33 PM	
View	159	ABC Company	[redacted]	Fix the stuff	[redacted]	9/8/2021 9:52:00 AM	9/8/2021 9:52:00 AM	2/14/2022 11:40:28 AM



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Item List

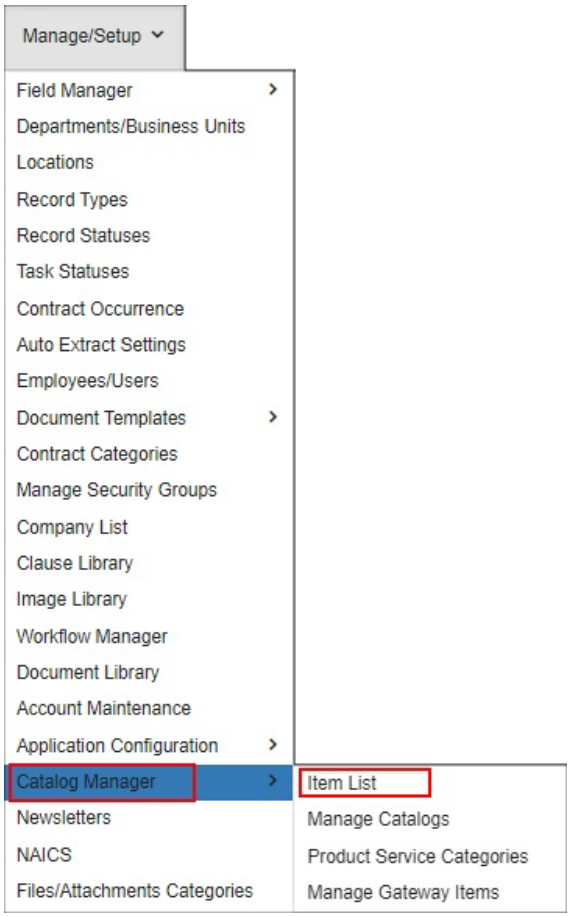
Item List

Catalog Manager: Item List

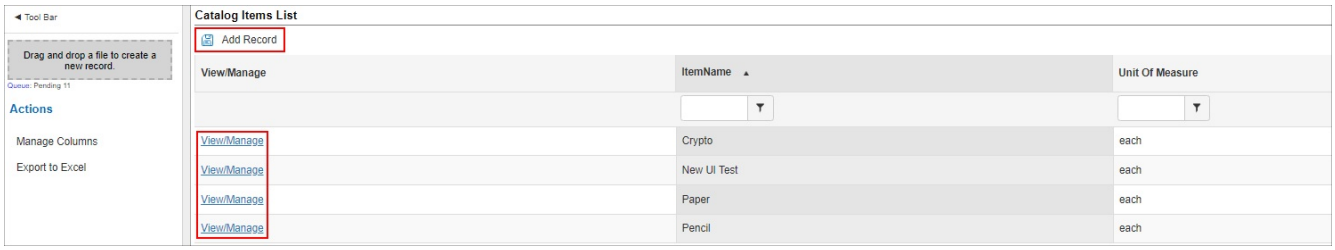
Contract Insight supports the ability to Manage the Items. In order to Manage the **Item List**, the user must have the **Setup: Manage Catalogs and Items** permission unless that user is a system admin.

Item List

Navigate to **Manage/Setup** > **Catalog Manager** > **Item List** to view the list of items.

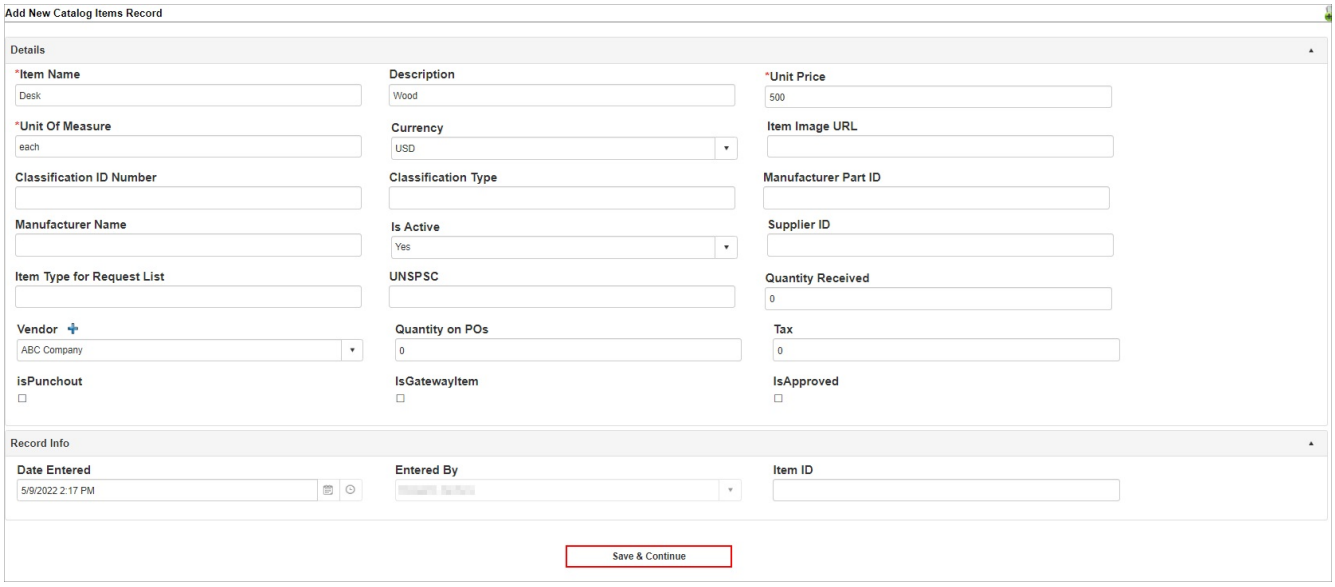


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Catalog Items List – This list will show you all the Items that were added in the system. **Add Record –** By clicking this button you will be able to add items to the list just like any other Add Record button in the system.





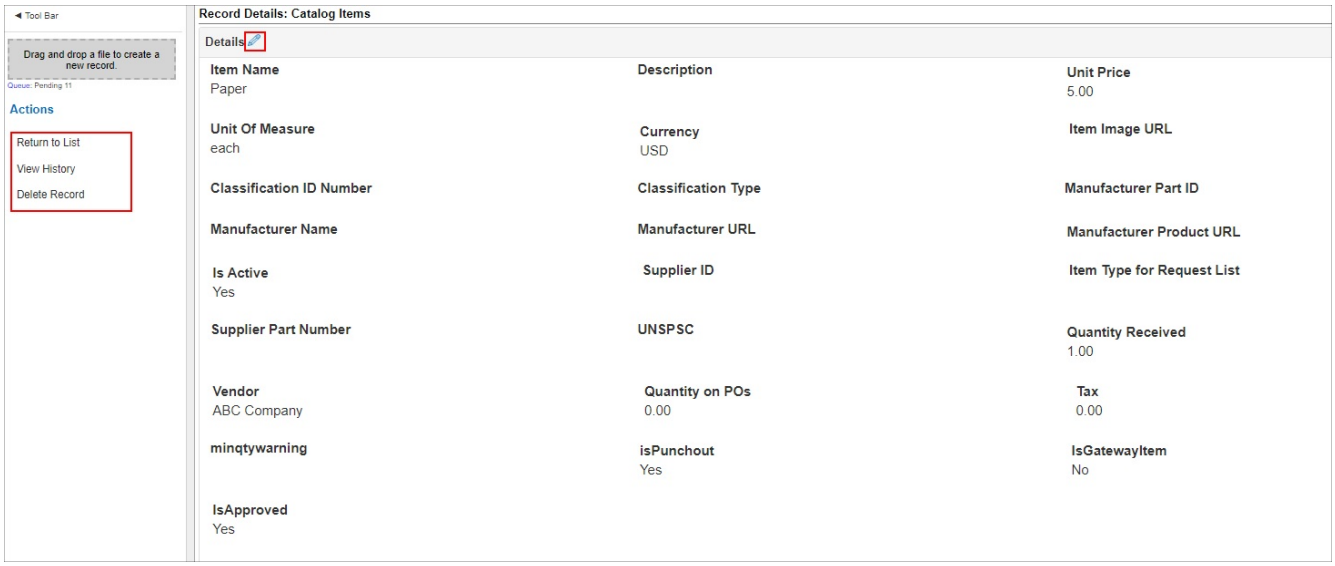
Is Active: If **Is Active** is set to No, it is not able to be assigned to a catalog or be searchable. If **Is Active** is set to Yes, it is able to be assigned to a catalog.

Once all the required fields and any other fields on the Add Screen are filled out click **Save & Continue** to save the Item.

View/Manage - View and Manage the Item.



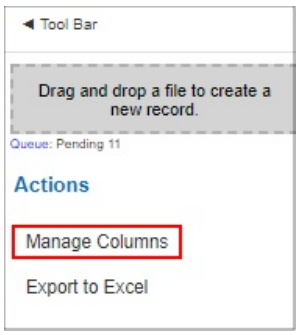
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On the **Record Details: Catalog Items** screen, the fields associated with the item display. A user may edit/manage any of the data in the specified fields by clicking the **Pencil** icon that appears when hovering over the area to the right of each field name. Multiple fields can be edited at once by clicking the **Pencil** icon to the right of the field group name.

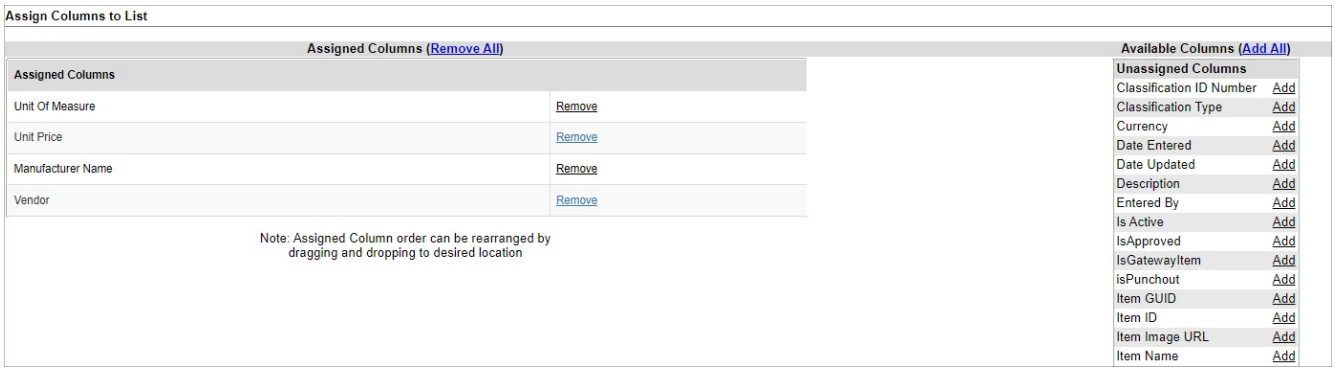
On the Side Menu under Actions:

Return to List: If clicked, the user will return to the **Catalog Item List** screen. **View History**: If clicked, the user will be taken to the **History Details & Audit Log** screen for this record. **Delete Record**: If clicked, the user will receive a prompt: **Are you sure you want to delete this record?** Click the **Yes, delete it** to delete the record. **Manage Columns -** To customize the columns displayed on the **Catalog Items List** screen, click **Manage Columns** on the side menu under **Actions**.



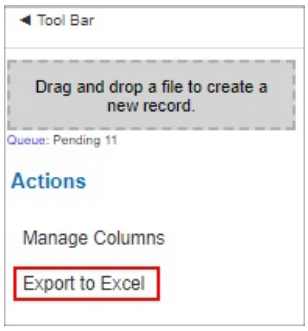
The **Assign Columns to List** screen will open. You can add fields to the **Catalog Items List** screen.

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Once done assigning columns, click **Back to List** on the side menu under **Actions**.

Export to Excel – Clicking **Export to Excel** will export the **Catalog Items List** screen to an Excel file.



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Manage Catalogs

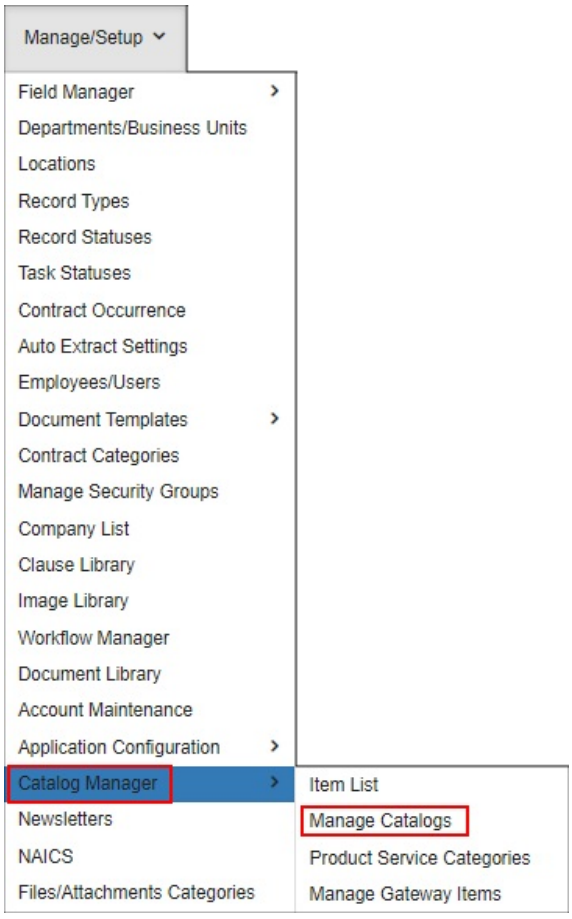
Manage Catalogs

Catalog Manager: Manage Catalogs

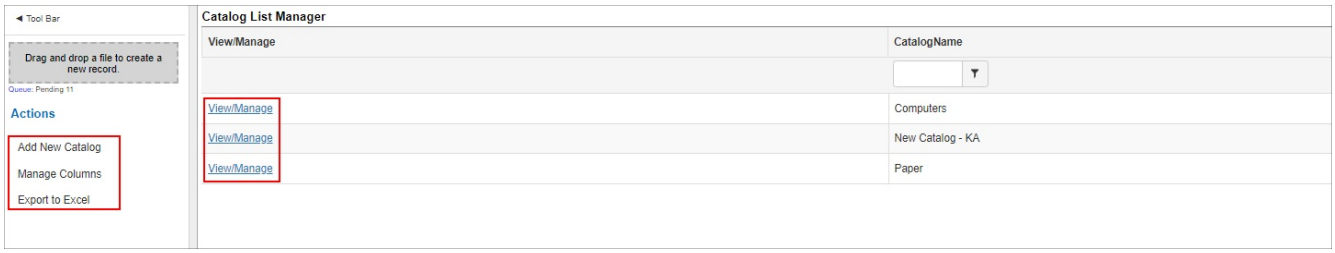
Contract Insight supports the ability to Manage Catalogs. In order to Manage the catalogs, the user must have the **Setup: Manage Catalogs and Items** permission unless that user is a system admin.

Manage Catalogs

Navigate to **Manage/Setup** > **Catalog Manager** > **Manage Catalogs**



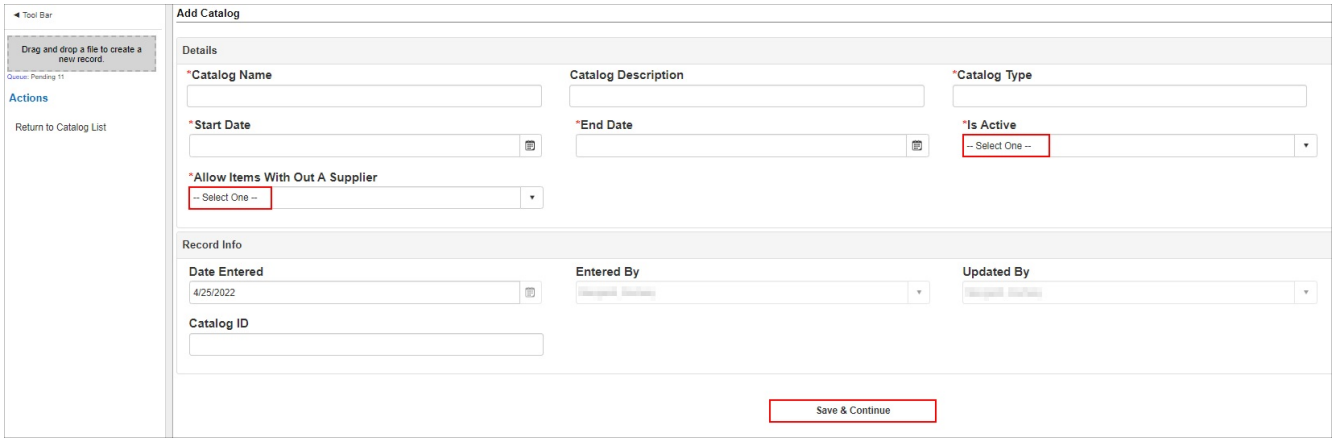
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Catalog List Manager – This list displays all the Catalogs that were added in the system.

Add New Catalog - Add new Catalogs to the system.





Is Active: If set to No, it is not searchable. If set to Yes, it can be searched for items within.

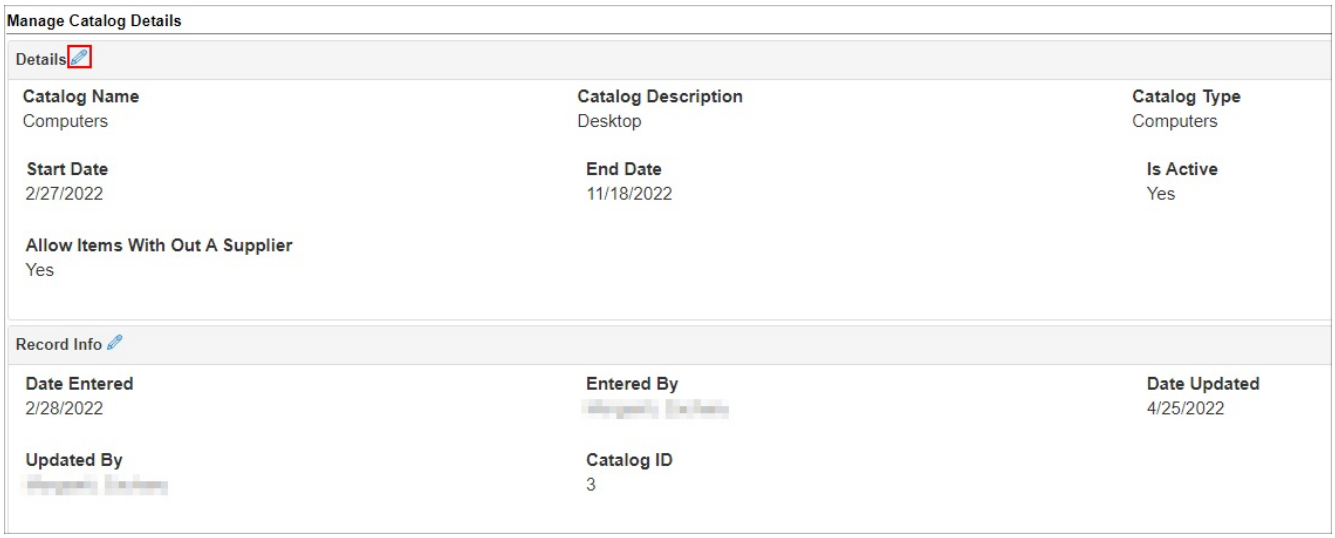
Allow Items Without a Supplier: If set to **Yes**, this catalog will list products and items with no suppliers (not recommended).

Once all required fields and any other desired fields on the **Add Screen** are filled out click **Save & Continue** to save the Item.

View/Manage - By clicking this, a user can View and Manage the Catalog.

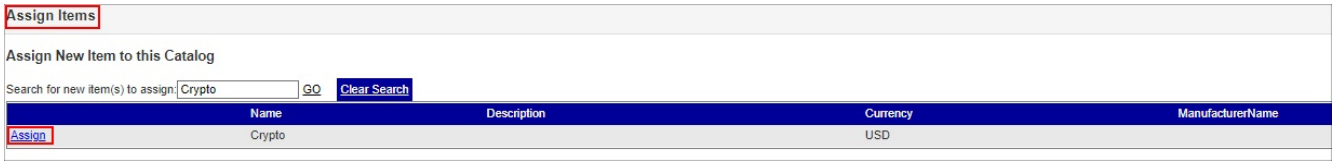


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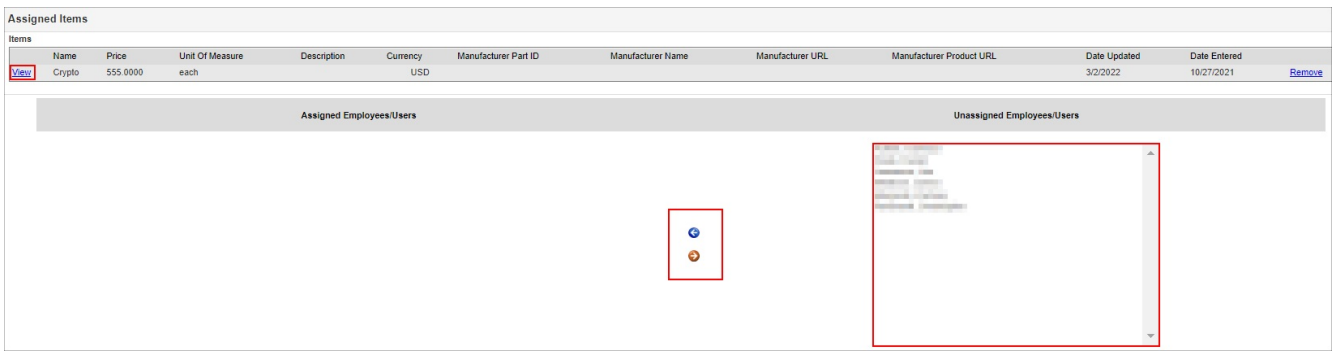
Fields associated with this item on the **Manage Catalog Details** screen. Edit/manage any of the data in the specified fields by clicking the **Pencil icon** that displays to right of each field name. Edit multiple fields at one time by clicking on the **Pencil icon** to the right of the field group.

Assign Items: This sub-table on the **Manage Catalog Details** screen allows the user to assign items to a catalog.



In the box to the left of **Search for new item(s) to assign**, type in the name of the Item (Ex: Router) and click **Go**. The results will appear. To assign the item, click **Assign** for the line item. To Clear the search results, click **Clear Search**.

Assigned Items: This sub-table on the **Manage Catalog Details** allows the user to manage already assigned items and assign employees/users to a catalog.

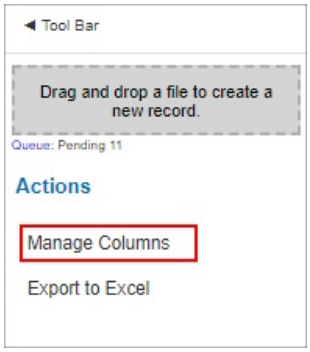


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From the **Assigned Items** sub-table**,** the user can view the item by clicking **View for** the line item. To remove an item from the catalog, click **Remove** for the line item. To assign Employees/Users to a catalog just highlight the Employee/User by selecting their name in the **Unassigned Employees/Users** column and click the **Blue Arrow** in the middle of the two columns to move the Employee/User to the **Assigned Employees/Users** column. Users assigned to the catalog can purchase any item from this catalog.

Note: a user can be assigned to multiple catalogs.

On the Side Menu, under Actions:



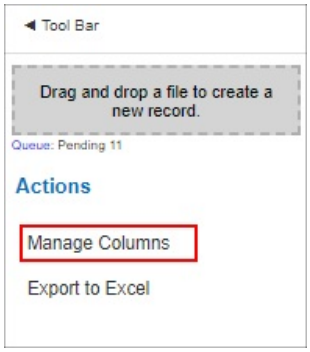
Add New Catalog: Add Catalogs to the list.

View History: When clicked, the user is taken the to the **History Details & Audit Log** screen for this record.

Return to Catalog List: When clicked, the user is taken the to the **Manage Catalog Details** screen.

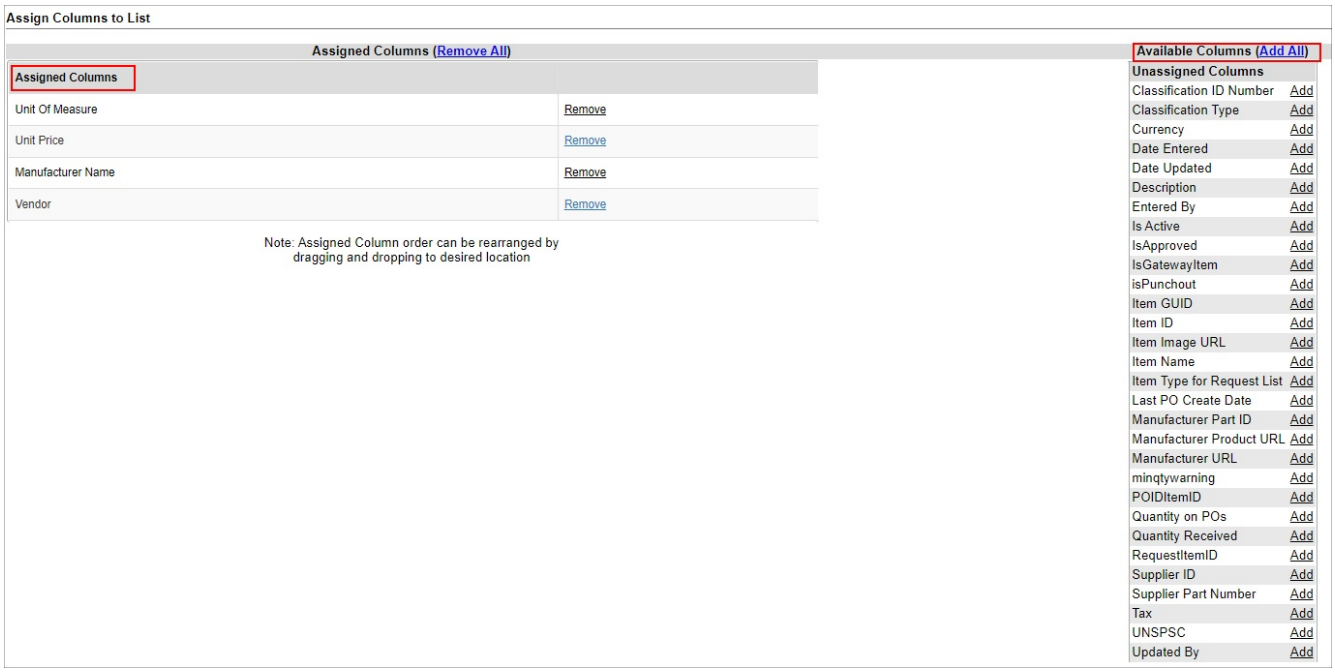
Delete Record: When clicked, the user is prompted with the message: **Are you sure you want to delete this record?** if yes click **Yes, delete it** to remove the record.

Manage Columns: To customize the columns displayed on the **Catalog Items List** screen, click the **Manage Columns** on the side menu of the screen under **Actions**.



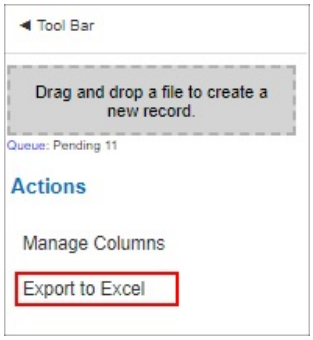
The **Assign Columns to List** screen displays. A user can add fields to the **Catalog List Manager** details screen.

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Once done assigning columns, click **Back to List** on the side menu under **Actions**.

Export to Excel: Exports the **Catalog List Manager** to an Excel file.



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Product Service Catalog

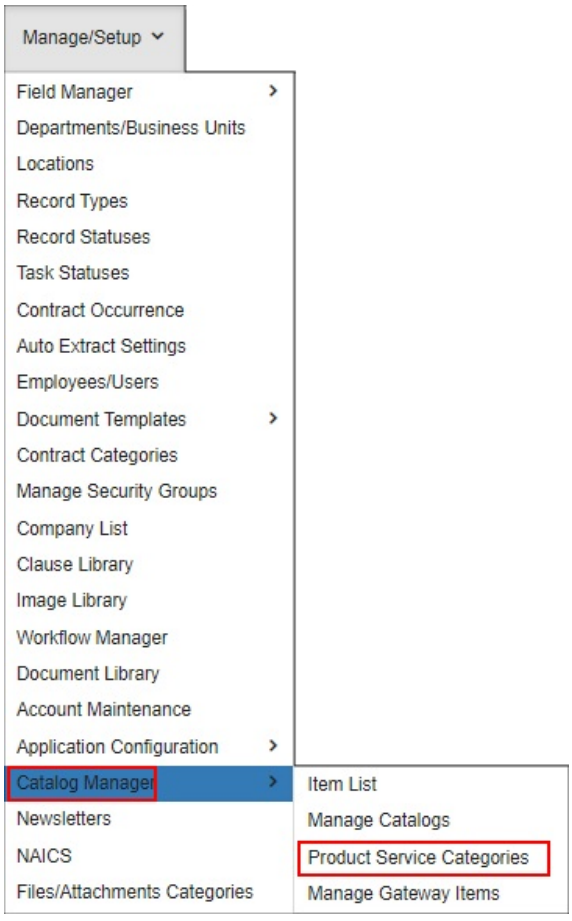
Product Service Catalog

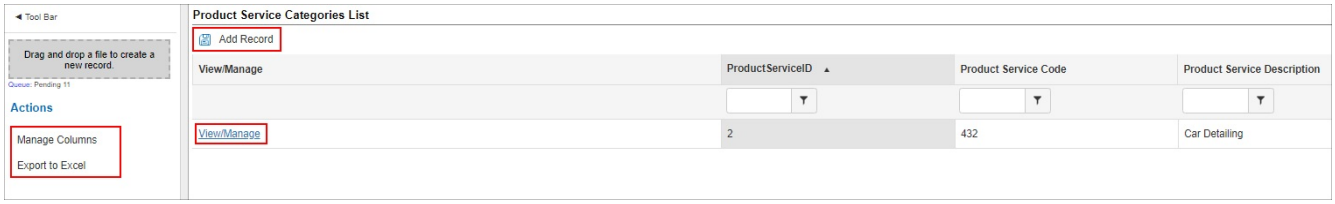
Catalog Manager: Product Service Catalog

Contract Insight supports the ability to Manage the **Product Service Categories List**. In order to Manage the **Product Service Categories**, the user must be a system admin.

Managing Product Service Categories

Navigate to **Manage/Setup** > **Catalog Manager** > **Product Service Categories**



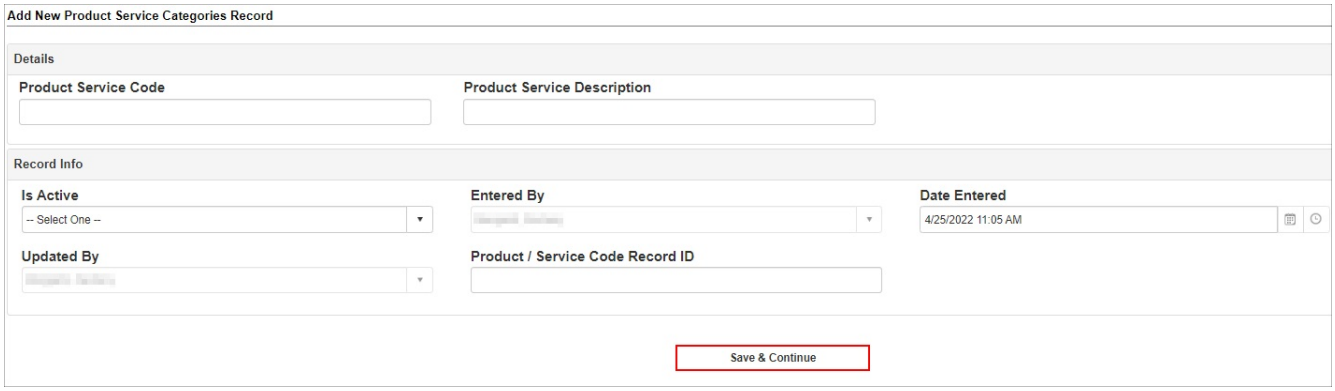


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Product Service Categories List – This list displays all the **Product Service Categories** that were added in the system.

Add Record – Clicking **Add Record** allows users to add **Product Service Categories** to the list.





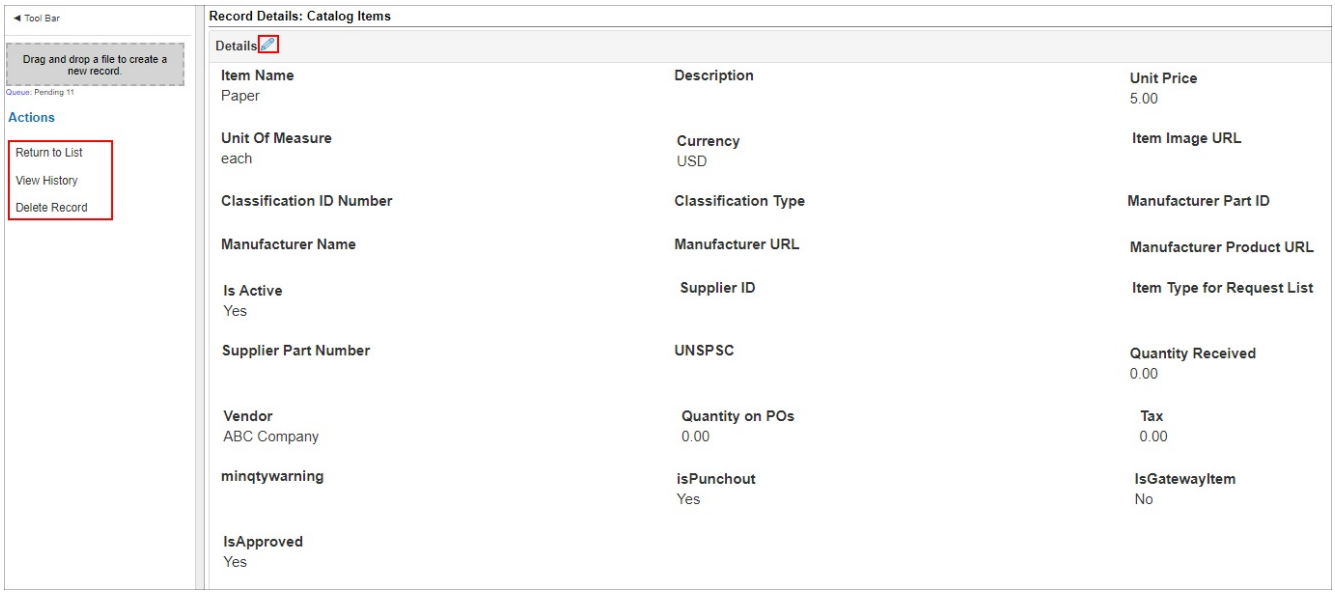
Note: If the Product Service Category's **Is Active** field is set to No, it will not be available from the **Product Service Code** drop down on the Solicitation record in the **Sourcing Record Product Service Codes** sub-table. If the **Is Active** field is set to Yes, it will be able available.

Once all the required fields and any other fields on the Add Screen are filled out click **Save & Continue** to save the Item.

View/Manage - Click **View/Manage** to edit the **Product Service Categories**.



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On the **Record Details: Product Service Categories** screen, fields associated with this record display. Edit/manage any of the data in the specified fields by clicking the **Pencil icon** that displays to the right of each field. Edit multiple fields at one time by clicking on the **Pencil icon** to the right of the field group.

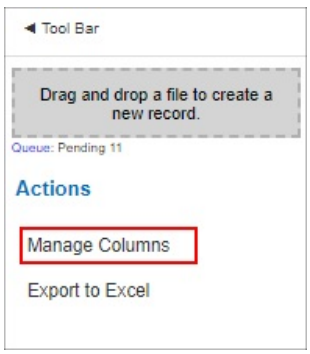
On the Side Menu under Actions:

Return to List: If clicked, the user will be taken to the **Product Service Categories List** screen.

View History: If clicked, the user will be taken to the **History Details & Audit Log** screen for this record.

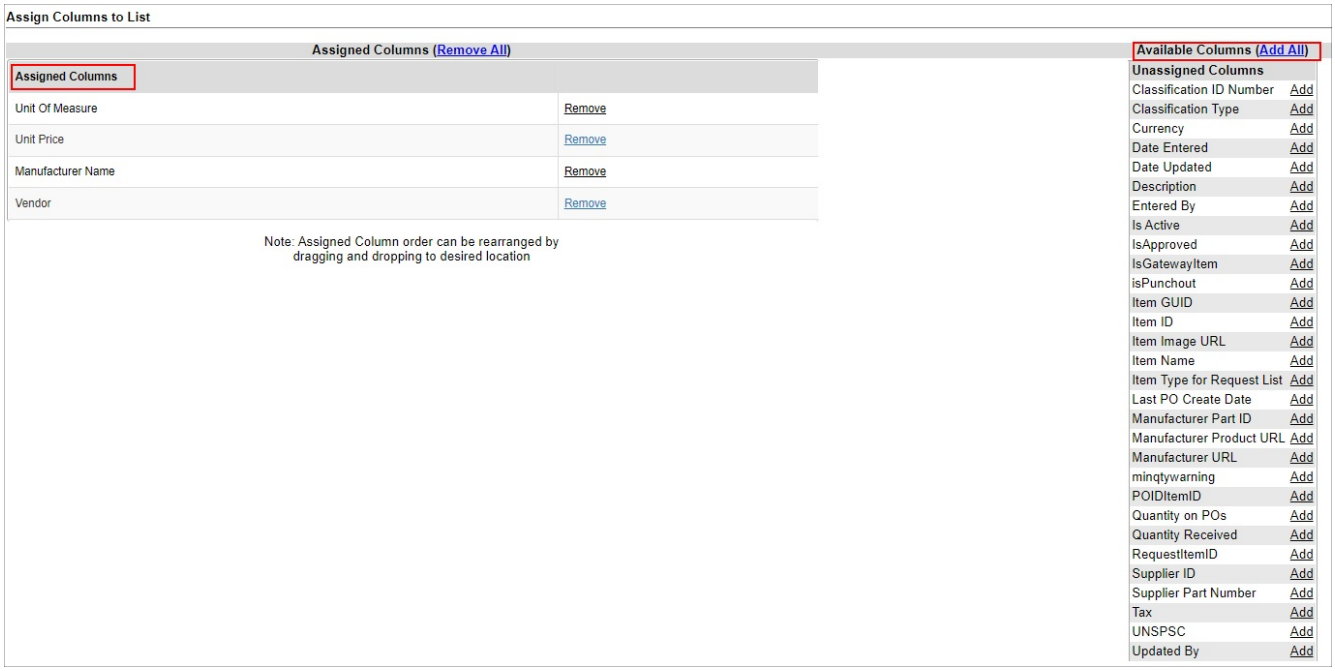
Delete Record: If this button is clicked it will prompt the user with **Are you sure you want to delete this record?** Click the **Yes, delete it** button to delete the record.

Manage Columns - To customize the columns displayed on the **Product Service Categories List** screen, click the **Manage Columns** button on the side menu.



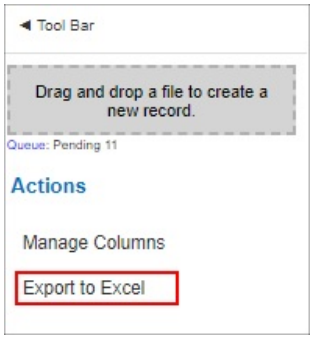
This will open the **Assign Columns to List** screen on which fields can be added or removed from the **Product Service Categories List** Details screen.

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Once done assigning columns, click **Back to List** on the side menu.

Export to Excel – Clicking Export to Excel will export the **Product Service Categories List** screen to an Excel file.



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01. Security: Permissions Overview

01. Security: Permissions Overview

This content has been replaced. Please see Employee User Permissions for more information.

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02. Security: Management

02. Security: Management

This functionality has been replaced. See Employee User Permissions for more information.

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03. Assigning & Managing an Employee/User's Permissions

03. Assigning & Managing an Employee/User's Permissions

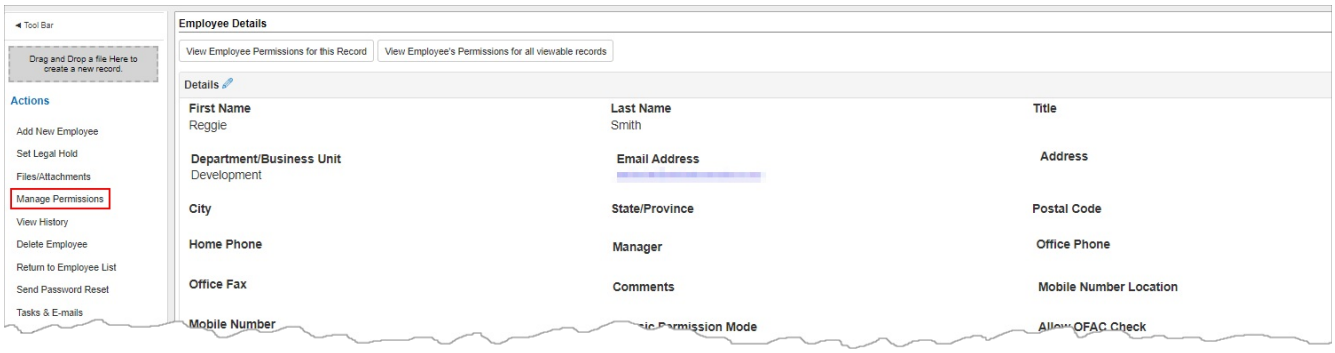
Employee/User Permissions: Assigning & Managing and Employee/User's Permissions

Contract Insight allows administrators to assign security permissions to individual employees or to security groups which employees can be assigned to.

To assign permissions to an individual employee

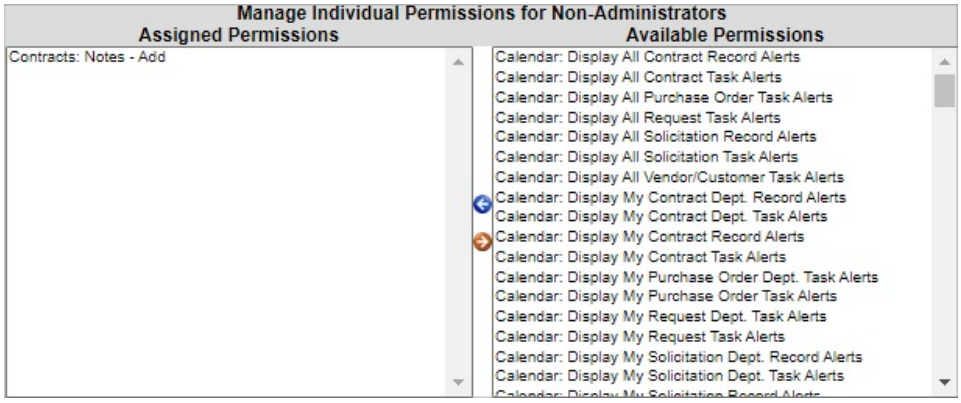
1. Go to the **Employee Details** screen for the employee/user for whom permissions are to be managed.

2. Click the **Manage Permissions** link on the side menu.



3. The **Employee Permissions** (for non-administrators) screen opens.

4. Go to the **Manage Individual Permissions for Non-Administrators** section.



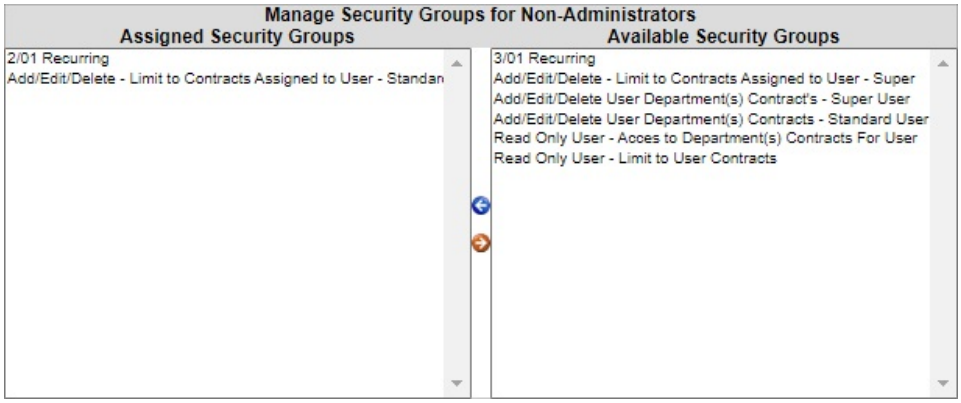
5. To assign permissions, click/highlight the permission line item in the **Available Permissions** box and click the **blue arrow** to add the permission to the **Assigned Permissions** box.

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6. To un-assign permissions, click/highlight the permission line item in the **Assigned Permissions** box and click the **red arrow** to remove the permission from the **Assigned Permissions** box.

To Assign an Employee/User to a Security Group:

1. Navigate to the **Employee Permissions** (for non-administrators) screen and go to the **Manage Security Groups for Non-Administrators** section.

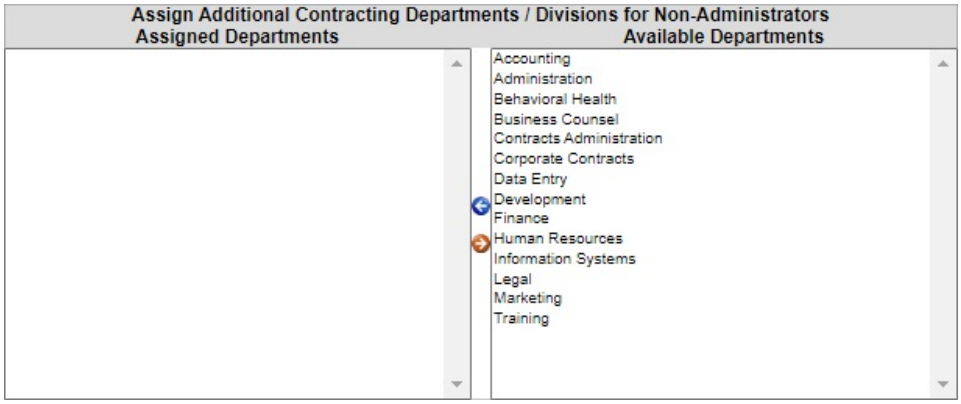


2. To assign a security group to the employee, click/highlight the security group line item in the **Available Security Groups** box and click the **blue arrow** to add the security group to the **Assigned Security Groups** box.

3. To un-assign a security group to the employee, click/highlight the security group line item in the **Assigned Security Groups** box and click the **red arrow** to remove the security group from the box.

To Assign Additional Departments/Divisions to an Employee/User

1. Go to the **Employee Permissions** (for non-administrators) screen and go to the **Assign Additional Contracting Departments/Divisions for Non-Administrators** section.



2. To assign a security group to the employee, click/highlight the security group line item in the **Available Departments** box and click the **blue arrow** to add the security group to the **Assigned Departments** box.

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3. To un-assign a security group to the employee, click/highlight the security group line item in the **Assigned Departments** box and click the **red arrow** to remove the security group from the box.

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04. Security Groups

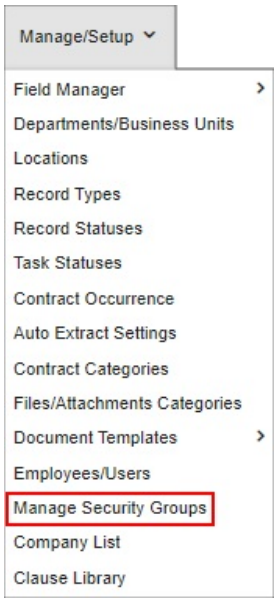
04. Security Groups

Employee/User Permissions: User-definable Security Groups

Create and/or Manage Security Groups and Roles:

Log into the system as an Application Administrator.

From the **Manage/Setup** menu, click **Manage Security Groups**.



The **Manage Security Groups** screen displays.

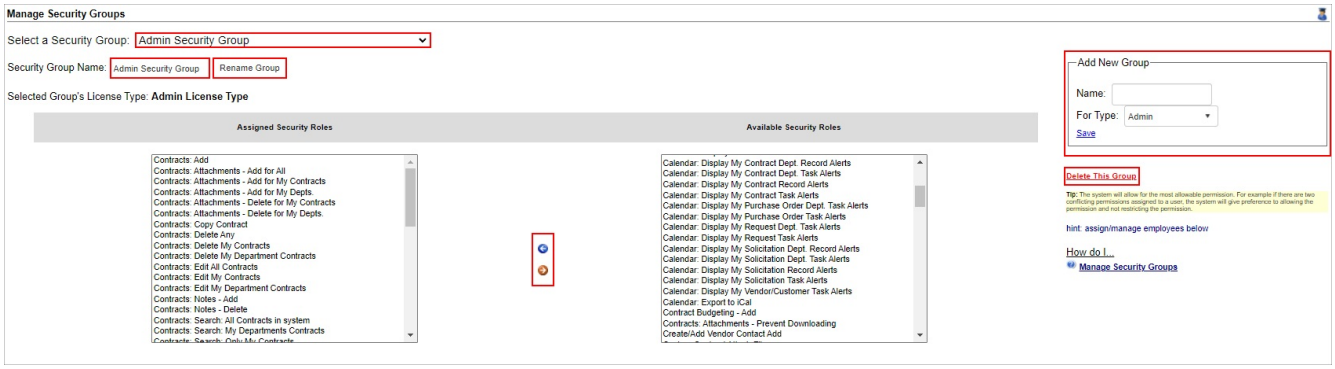
To view or manage an existing Security Group, select a security group from the **Manage Security Group: Select a Group** drop down menu. The Available and Assigned security roles for the selected group display. From here, users may also rename a security group by typing in the box and clicking **Rename Group** when finished.

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Assigning and Removing Security Roles from a Security Group:

To assign security roles to the selected **Security Group**, select the **Blue Left Arrow** for the particular Security Role to be assigned.

To remove a security role from a Security Group, select the **Red Right Arrow** from assigned role to be removed.



Creating a New Security Group:

To create a new **Security Group**, enter the new security group name in the text box on the right hand of the screen (see above). Click **Save**. Once created, the screen will refresh. Select the security group from the **Manage Security Group: Select a Group** drop down menu.

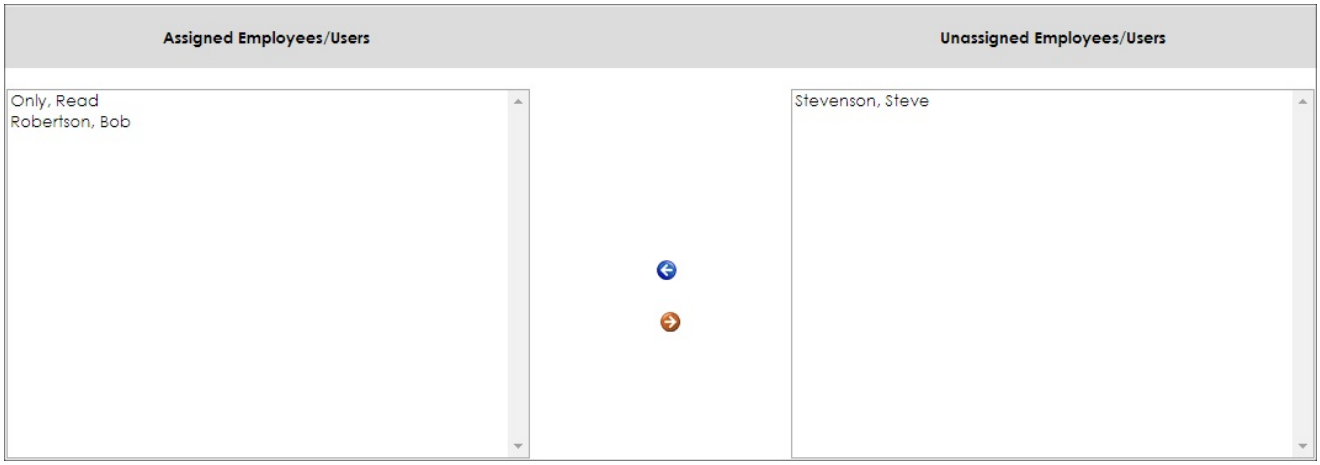
To assign security roles to the selected Security Group, select the security role/permission from the **Available Security Roles** area and click the **Blue Left Arrow** button for the particular security role to assign. To remove a security role from a Security Group, select the security role/permission from the **Assigned Security Roles** area and click the **Red Right Arrow** button from assigned role to remove.

Assigning an Employee to a Security Group

On the Managing Security Groups screen, Admin users may assign employees to a selected Security Group.

To assign employees to a security group, select the Security Group from the **Manage Security Group: Select a Group** drop down box. Select the employee(s) in the **Unassigned Employees/Users** area and click the **Blue Left Arrow**. To remove (un-assign) an Employee, select the employee(s) in the Assigned Employees/Users area and click the **Red Right Arrow** to remove (un-assign) the selected individual(s) from the Security Group

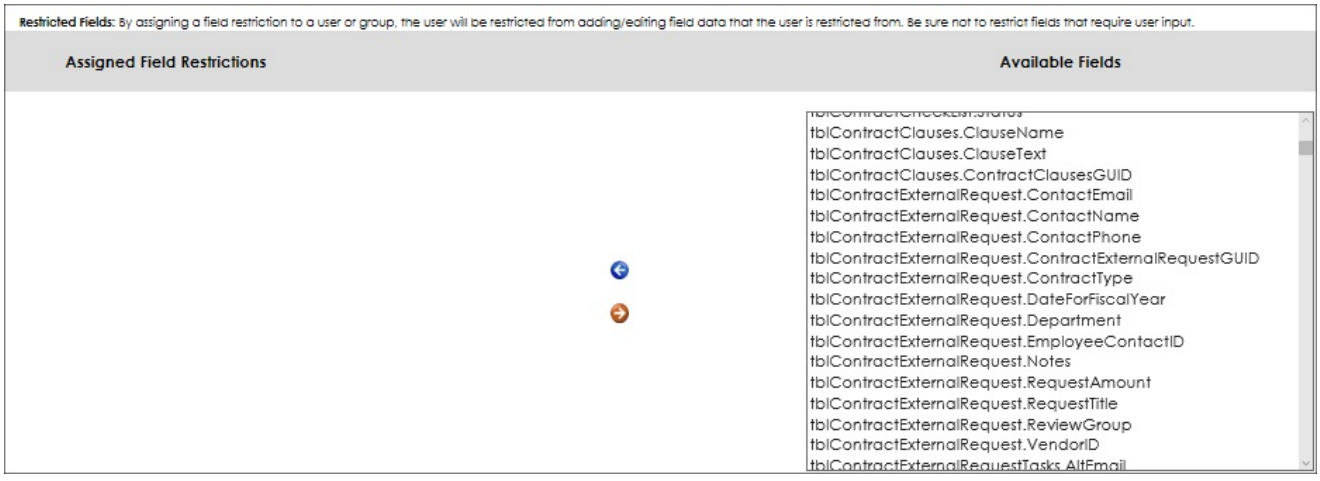
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Note: If using **Leveled Licenses**, only the employees with a license level matching that of the security group appear in the Assigned and Unassigned Employees/Users areas.

Setting Field Restrictions

Security Groups can also manage/assign **Field Restrictions** for Contracts for all employees assigned to them. To assign Field Restrictions, select the field(s) from the **Available Fields** area and click the **Blue Left Arrow** to move the selected fields to the **Assigned Field Restrictions** area. To remove a restricted field, select the desired field(s) from the **Assigned Field Restrictions** and click the **Red Right Arrow** to move the selected field(s) to the **Available Fields** area.

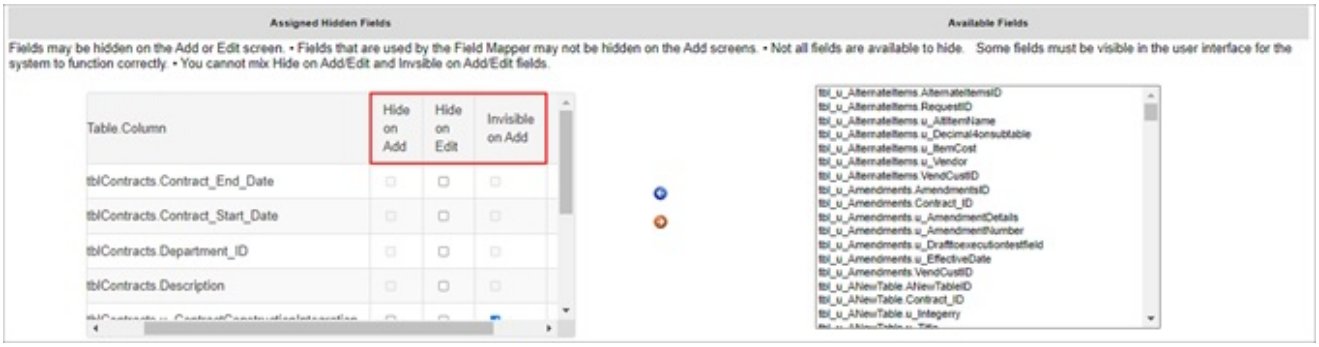


Assign Hidden Fields

Security Groups can also manage/assign **Hidden Fields** for records for all employees assigned to them. To assign Hidden Fields, select the field(s) from the **Available Fields** area and click the **Blue Left Arrow** to move the selected fields to the **Assigned Hidden Fields** area. To remove a hidden field, select the desired field(s) from the **Assigned Hidden Fields** and click the **Red Right Arrow** to move the selected field(s) to the **Available Fields** area.

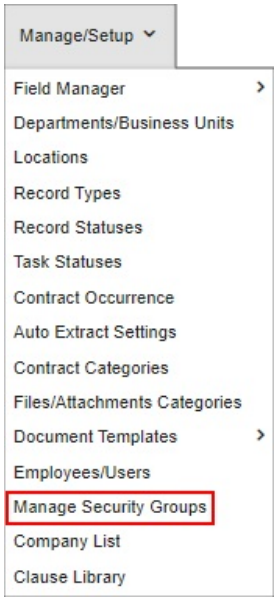
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You can also set if the field is hidden when the user is adding a new record, editing a new record, or both. To hide fields when a user is adding or editing a record, find the field in the **Assigned Hidden Fields** area, check the box in the **Hide on Add** and/or **Hide on Edit** column(s). To change, find the field in the **Assigned Hidden Fields** area and remove the check in the **Hide on Add** and/or **Hide on Edit** column(s).



Limit Reference Data Lists by Security Groups:

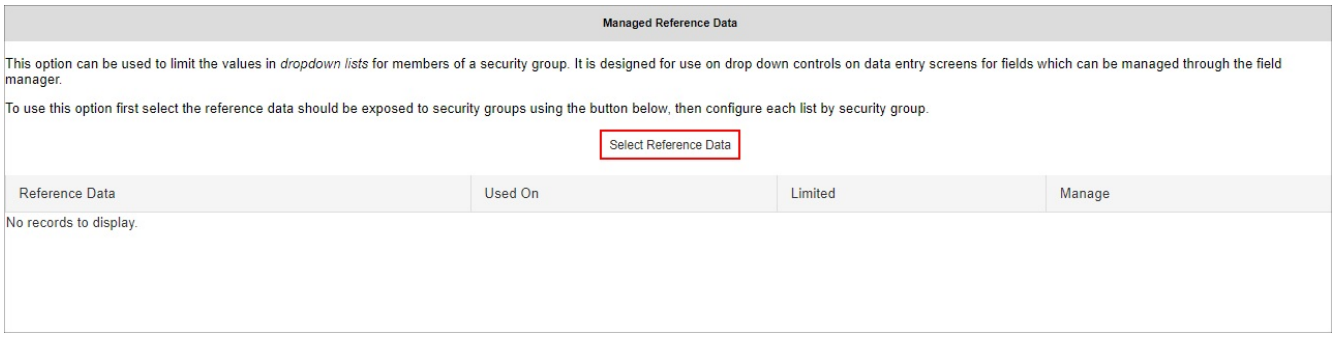
From the **Manage/Setup** menu, click **Manage Security Groups**.



The Manage Security Group screen displays.

Select a security group from the **Manage Security Group: Select a Group** drop down menu. Then scroll down to the **Limit Reference Data** table and click on the **Select Reference Data** button.

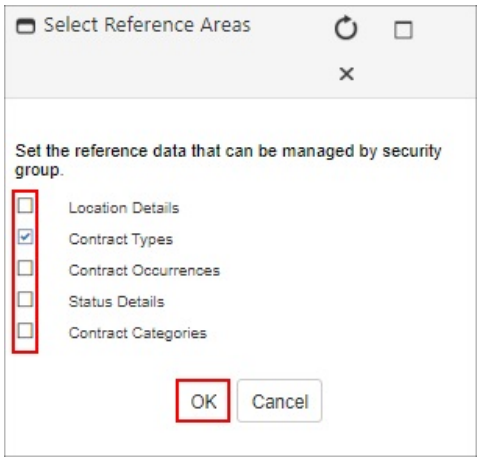
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After clicking **Select Reference Data** a pop-up window will appear for you to select the reference area.

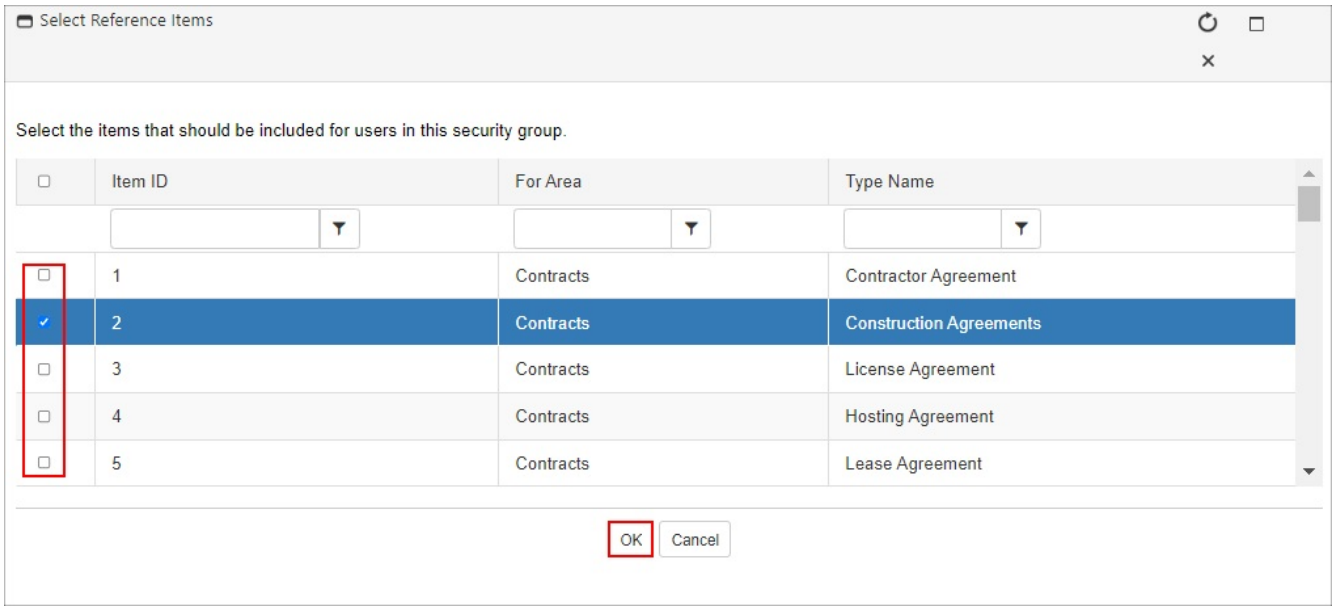
Click the check box of the areas you want the security group to be able to manage, the security group will not be able to manage anything left unchecked.

Once you have selected your areas you can exit out and you will see the reference data table below. You can click on the manage button on the right.



Clicking on the manage reference items button will open a pop-up window to be able to refine the selections of specific types.

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Click the check box of the types you want the security group to be able to manage, the security group will not be able to manage anything left unchecked.

Assign System Dashboards and Graphical Dashboards by Security Group:

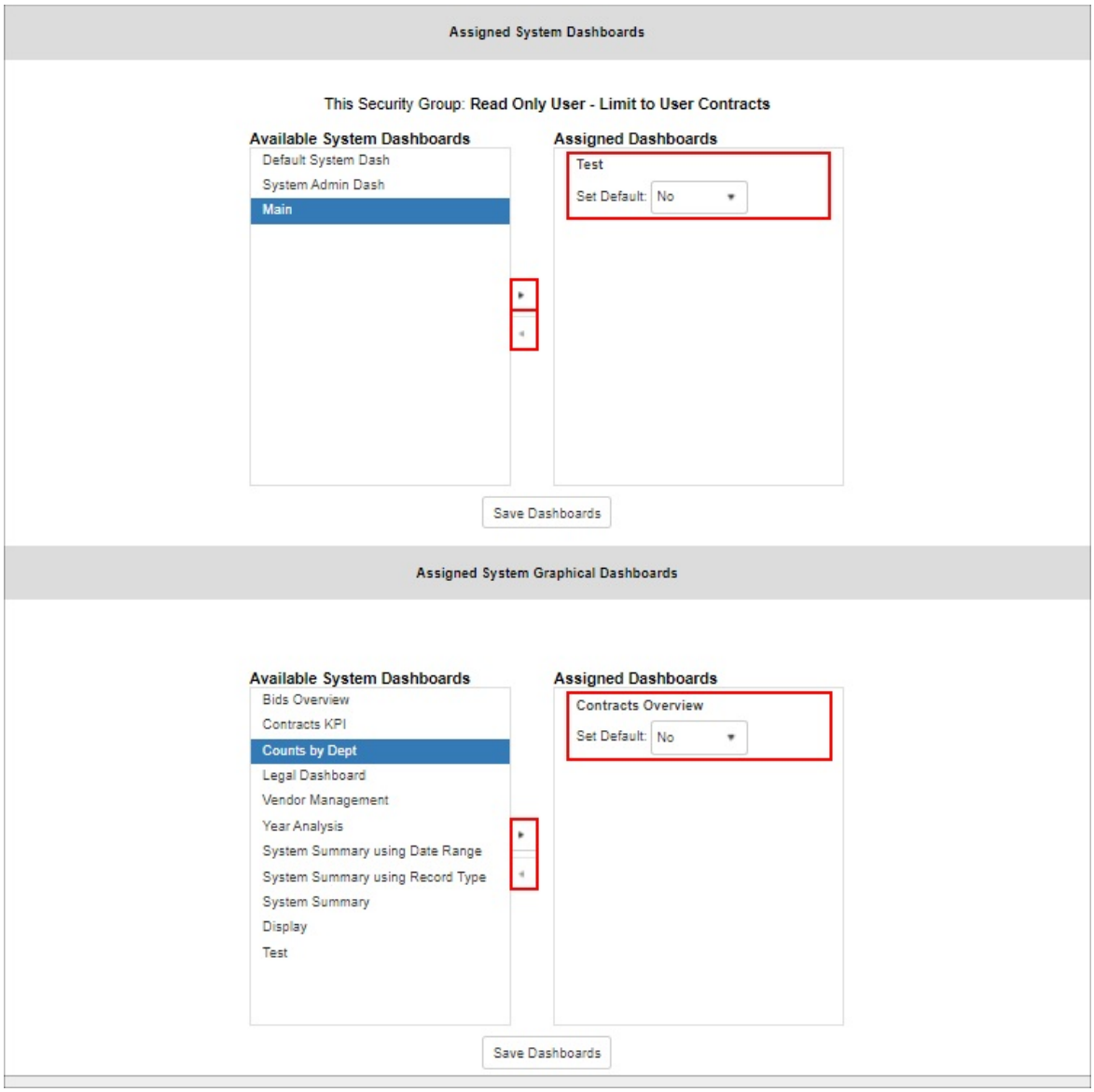
Security groups can be used for assignment of System Dashboards so all members of the group are assigned the dashboard.

1. Select the desired dashboard from the list on the left

2. Click the right facing arrow.

3. Select if the newly select dashboard is to be the default.

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Delete a Security Group

To delete a Security Group, select the Security Group name from the **Manage Security Group: Select a Group** drop down menu.

Click **Delete This Group** on the side menu (and confirm the delete).

Note: Be sure to reassign employees/users to a new security group.

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05. Advanced/User-Defined Permission Management

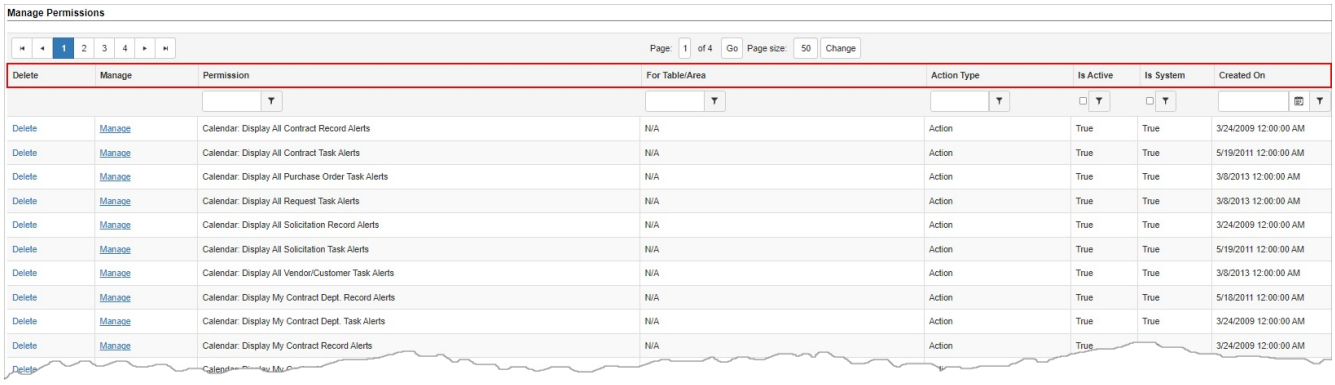
05. Advanced/User-Defined Permission Management

Advanced/User-Defined Permission Management

Advanced Permissions allows for the creation of custom permissions that can be assigned to security groups or to individual employees. Advanced permissions management is only accessible by system administrators for defining the various permissions. Any permissions created through the advanced permission management can be assigned directly to employee records and/or to security groups in the same way that out-of-the-box permissions are assigned.

Creating a User-Defined Permission

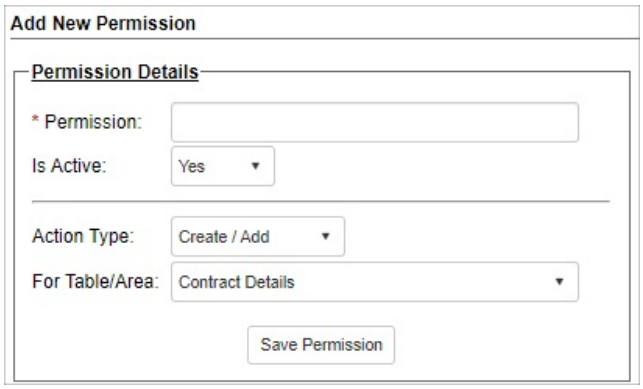
1. Navigate to **Manage/Setup - Manage User Permissions**. A list of all Permissions displays.



On the **Manage Permissions** screen, options to **Delete** (only custom-configured permissions) and **Manage** are available. Also displayed are the **Permission Name**, the **Table/Area** to which the permission applies, the **Action Type**, if the permission is **Active**, if it is a **System** permission, and the date on which the permission was **Created**. To assist with location of a permission, any of those displayed items can be used for filtering.

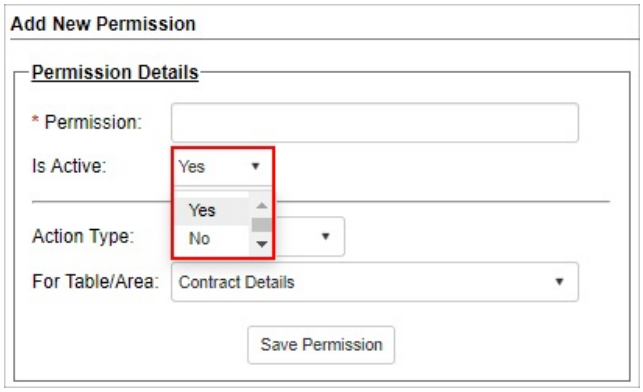
2. Click **Create New Permission** on the Side Menu to begin setting up a new custom permission.

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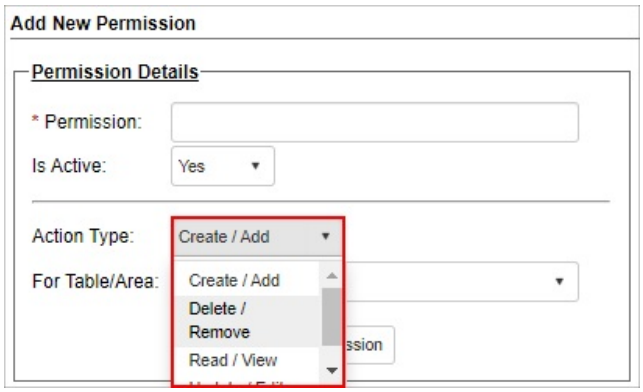


2. Provide a name for the Permission. Establishing a naming convention is important to help keeping track of permissions created, having a brief description, and locating them for use.

3. Set **Active** to True to enable to use of the permission.

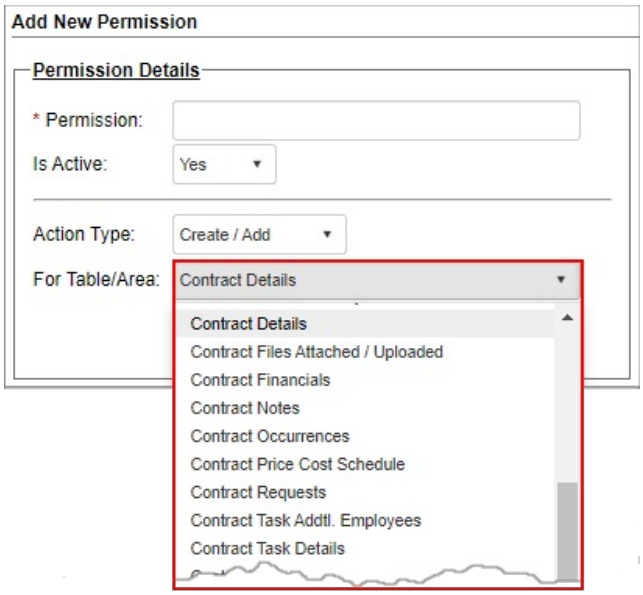


4. Select an **Action Type** from the choices of **Create / Add**, **Delete / Remove**, **Read / View**, and **Update / Edit**.

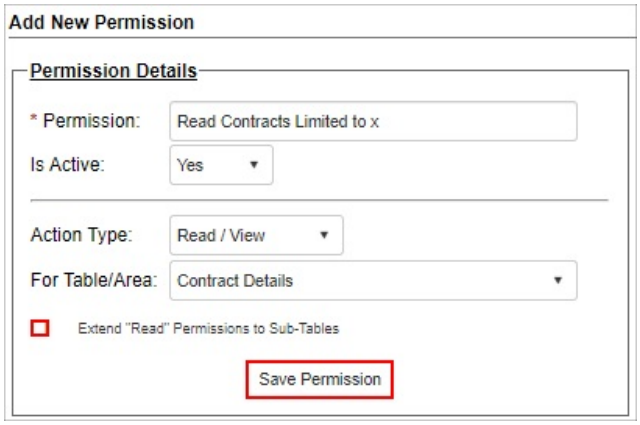


5. Select the **Table/Area** to which the Permission applies.

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For example, we could create a permission to allow some users to view records of a certain type.

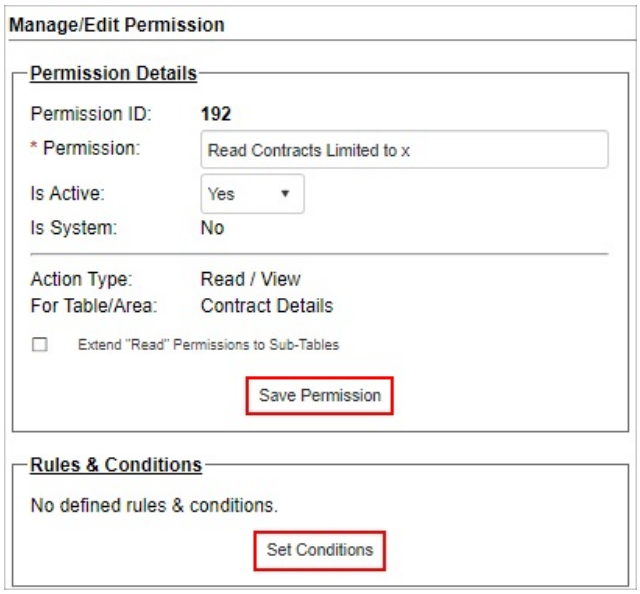


6. To extend the permission being created to a sub-table, mark the **Extend X Permissions to Sub-Table** (where x is the action type).

7. Click **Save Permission**.

8. The screen refreshes and the **Rules & Conditions** area appears. If making changes to the **Permission Details**, click **Save Permission** when done.

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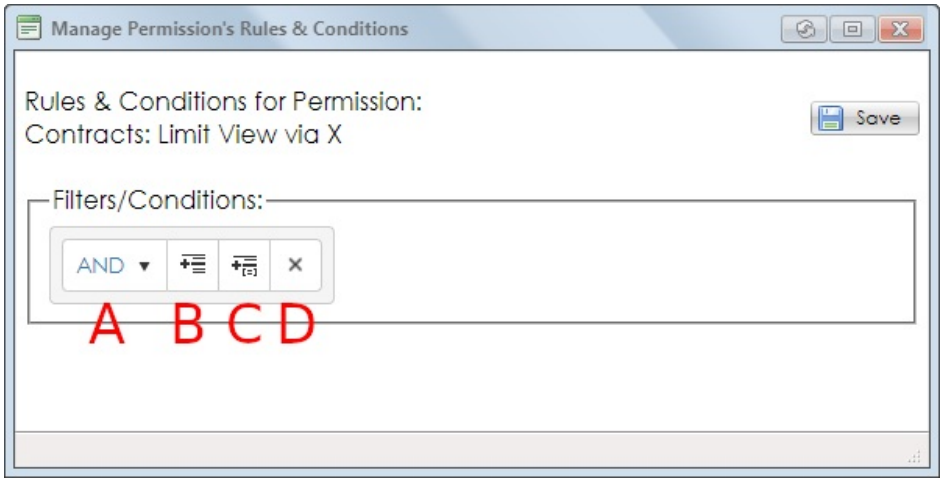


Setting Rules & Conditions

Rules and Conditions can be established for user-defined permissions to limit when they apply.

1. Click **Set Conditions**.

2. The **Manage Permission's Rules and Conditions** pop-up window displays. Like many other areas of the system, a Filters & Conditions area displays. This area has a few options:



A. **Logical Switch**: Select And or Or to define the condition group's function.

B. **Add Expression**: Click the **Add Expression icon** to add a single new logical expression for the selected Expression Group.

C. **Add Expression Group**: Click the **Add Expression Group icon** to add a new Expression Group with its own Logical Switch.

D. **Delete Expression or Expression Group**: Click the **X** icon to remove the individual Expression or Expression Group.

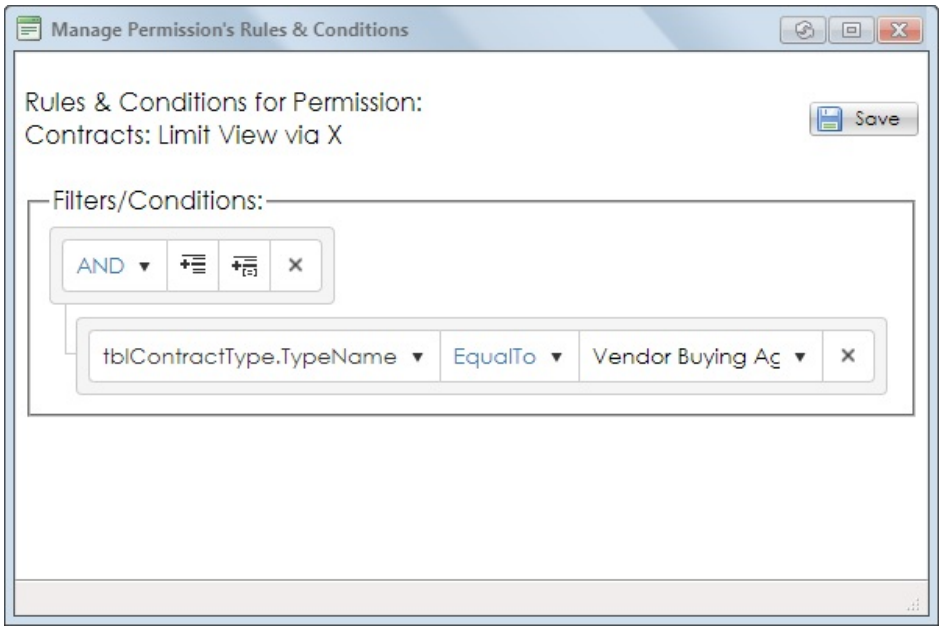
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3. If setting rules, each Expression Group must contain at least one Expression. Click the **Add Expression icon**.

4. Select the table and field for the rule.

5. Select the logical expression for evaluation.

6. Enter the string for the logical expression's evaluation.

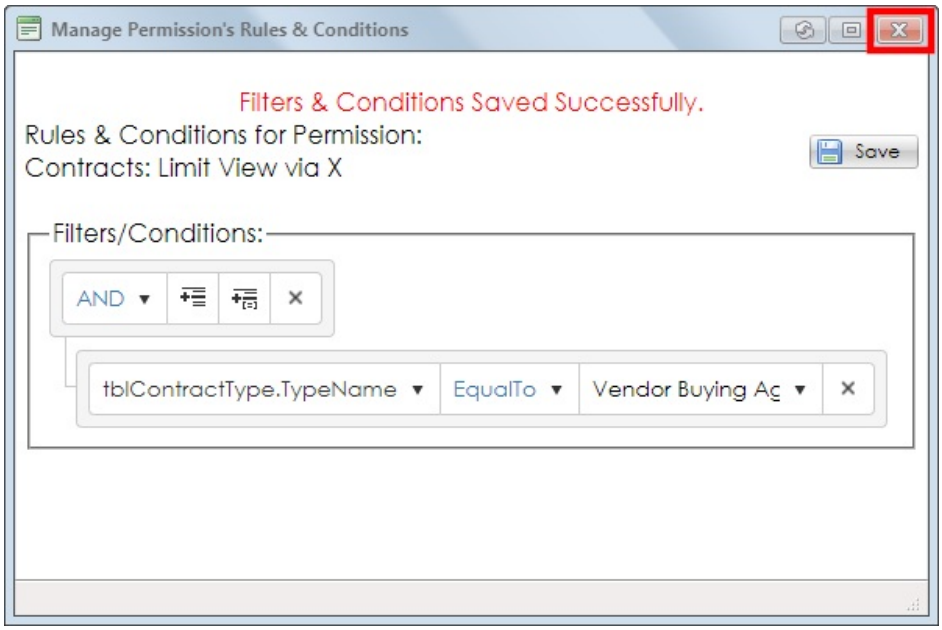


In the example above, we set the table and field to tblContractType.TypeName, the logical expression to EqualTo and the evaluation criteria to the specific type name, Vendor Buying Agreement to provide read access to specific individuals or security groups for the contracts of the Vendor Buying Agreement type.

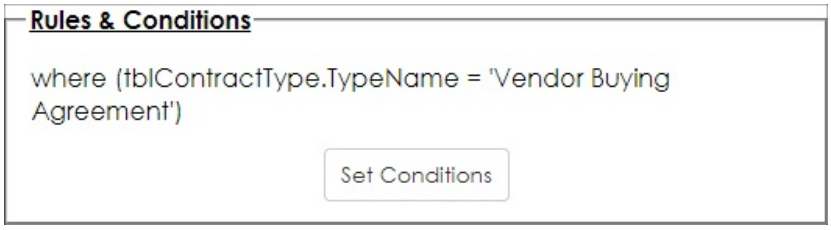
7. Click **Save** to save the rule/condition.

8. A message stating Filters & Conditions Saved Successfully displays. Click the **X** in the corner to close the pop-up window.

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9. When returning to the **Manage Permissions** screen, the rule/condition(s) display.



Applying the User-Defined Permission

1. Navigate to the desired security group or individual employee permission list.

2. Find and select the user-defined permission. Permission display in alphabetical order, so keeping a consistent naming convention is important.

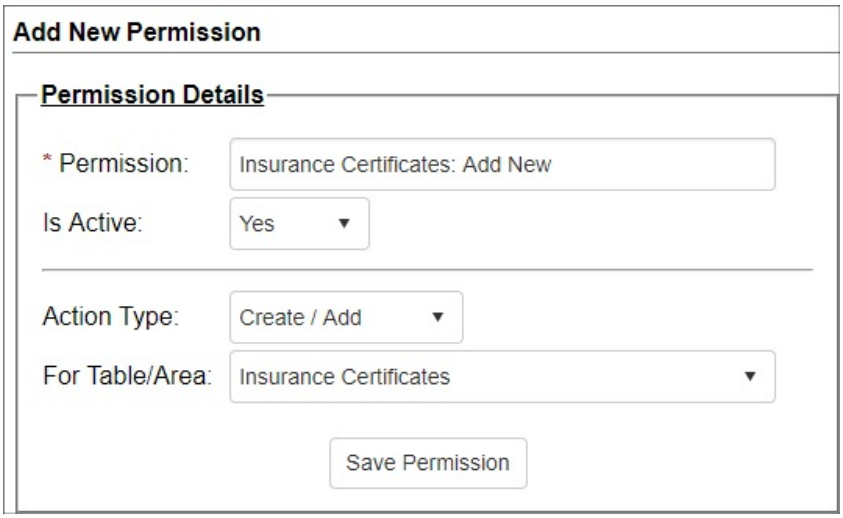


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3. Click the left-facing arrow to add the permission to those assigned.

Notes:

1. User-defined permissions can be created for sub-tables. If not extending permissions to a sub-table, such may be necessary for some users.



2. Best practice dictates testing of all user-defined permissions to ensure desired functionality before applying them to users.

3. Use extreme caution if building and applying user-defined permissions! Conflicts and undesired results may occur due to missing permissions or conflicting rules. CobbleStone recommends working with a CobbleStone Implementation Specialist before creating and applying such permissions for the first time.

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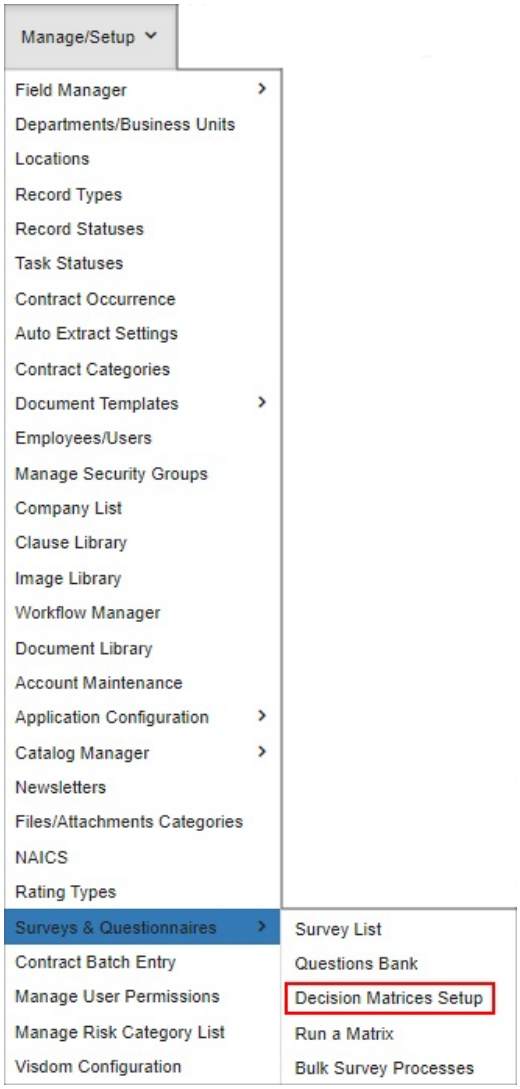
1. Decision Matrix Overview

1. Decision Matrix Overview

Decision Matrix Overview

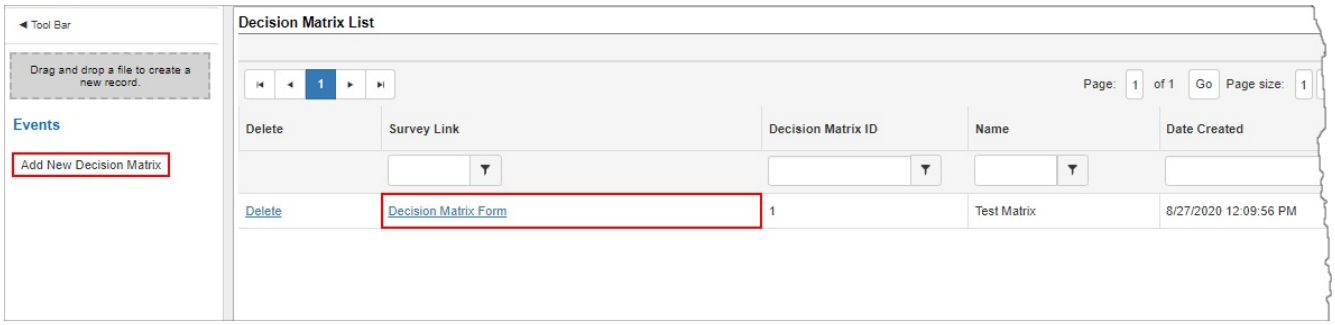
CobbleStone's Decision Matrix is a tool that can be used to assist users to perform actions within the system such as select the correct Record Type. The idea behind Decision Matrices is to develop a series of questions and answers and based off the answers provided and selected, a recommended ending response appears.

A System Admin user can create decision matrices. Navigate to **Manage/Setup - Surveys and Questionnaires - Decision Matrices Setup** for the setup page.



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On the Decision Matrix List screen, an admin can **view** a list of any decision matrices already created. Click **Decision Matrix Form** for the needed line item to view and edit the existing matrix.



An admin can also click **Add a New Decision Matrix** to add a new matrix.

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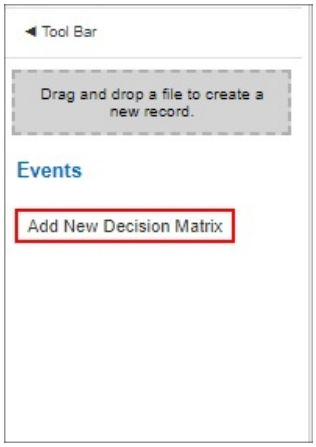
2. Adding a Decision Matrix

2. Adding a Decision Matrix

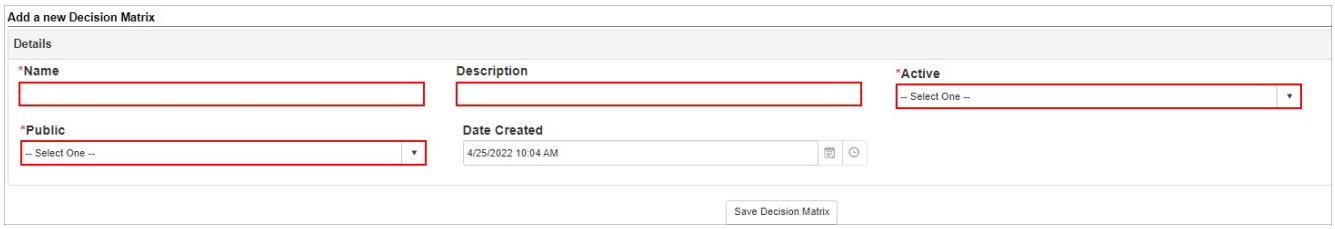
Adding a New Decision Matrix

Over the course of time, it may be necessary to create decision matrices to help users reach specific decisions.

1. On the side menu, click **Add New Decision Matrix**.



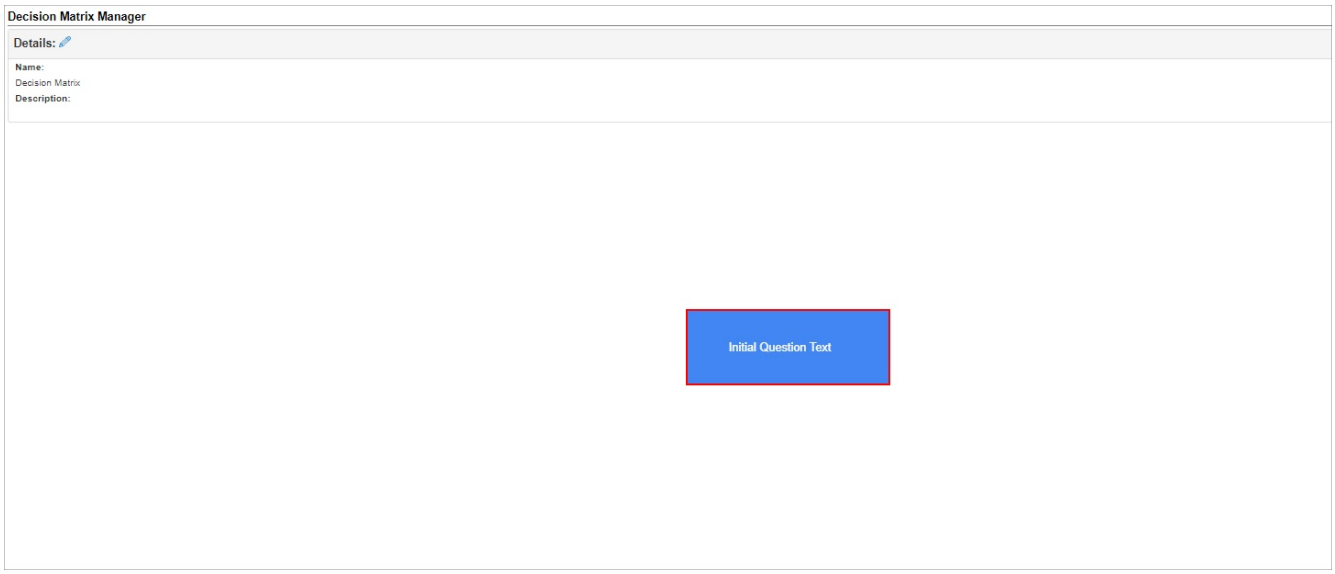
2. Assign the new matrix a **Name**, give it a **Description**, optionally make it a **Public Decision Matrix** (making it available to all employees), and optionally mark the Matrix as **Active**.



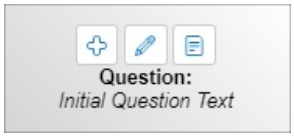
3. Click **Save Decision Matrix**.

4. The creation screen for the Matrix displays.

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5. Click the Initial Question Box to bring up a toolbar to **Edit the Question**, **Add a New Question**, or **Preview the Question**.

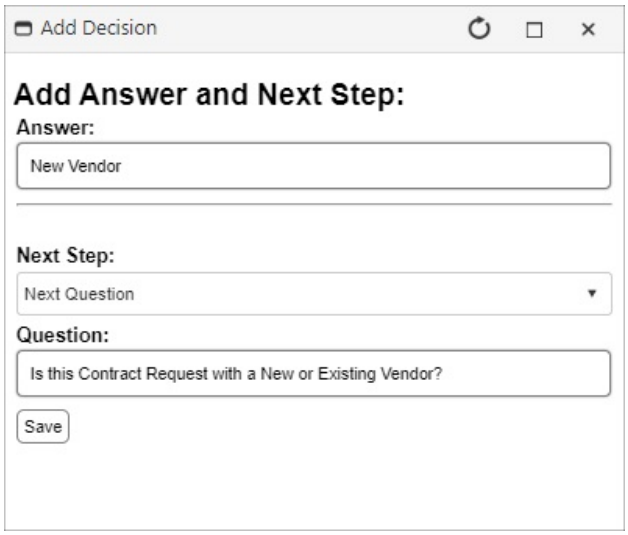


Adding and Editing Answers

1. To add a new question, click the **plus icon**



2. A pop-up window displays for an admin to create the **question**, the **initial response**, and the **next step**.

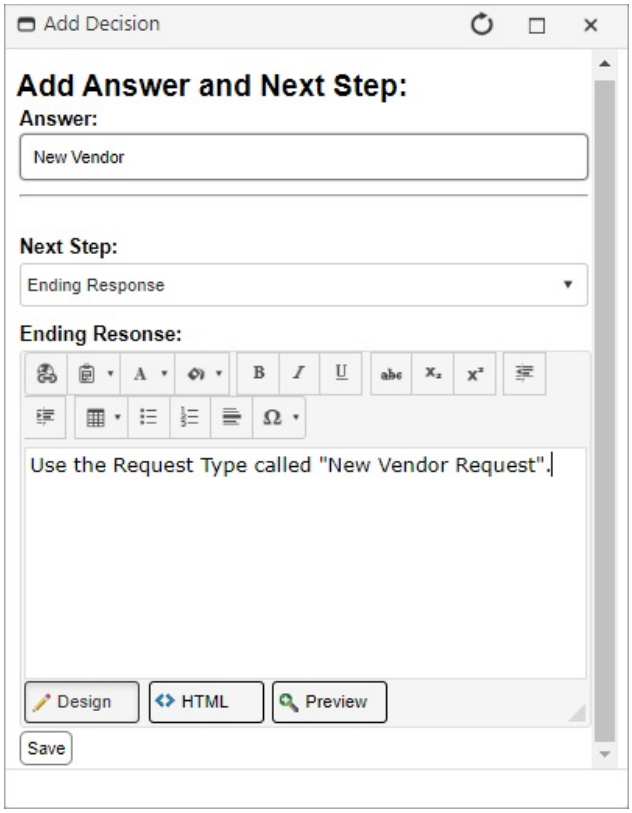


3. Select either add the **Next Question** or move to an **Ending Response**.

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4. If an Ending Response is selected, give the recommended action based off the answer selected. Use the rich text editor to format the text or enter a hyperlink (such as to a specific request type). Click **Save** when done.



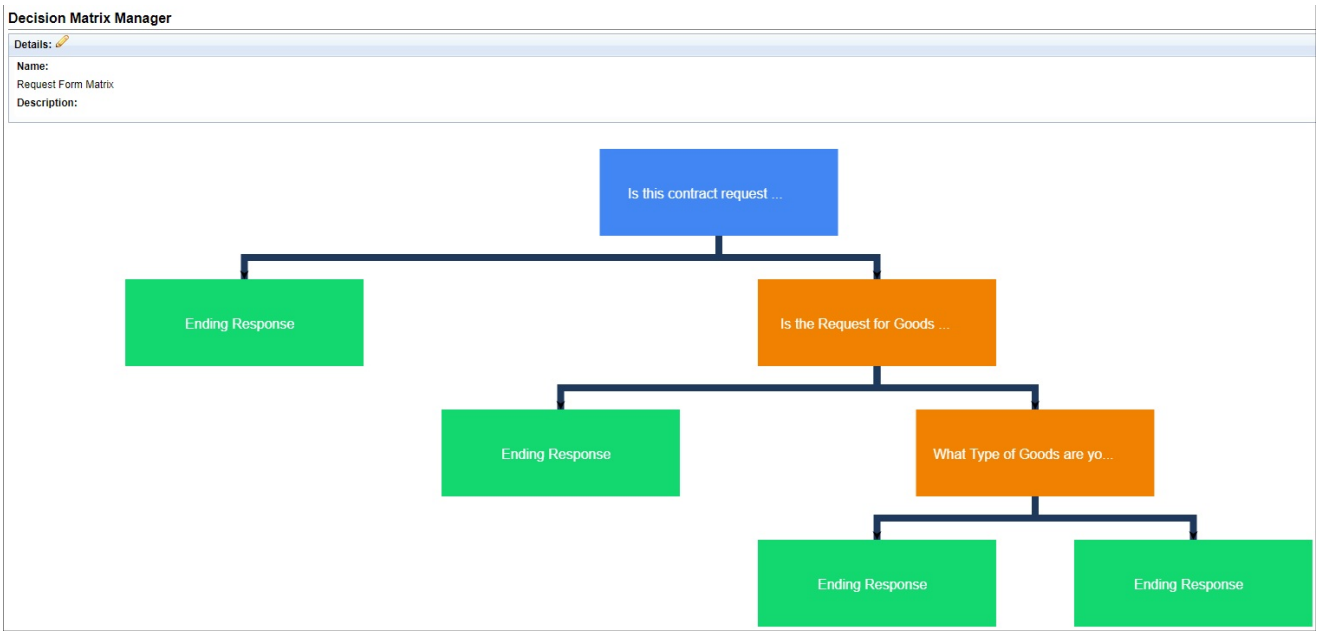
5. Each answer is in a black connecting line. To edit an answer, click the black line closest to either the Ending Response or the Follow Up Question

6. Click the **pencil icon**.



When each point is saved, the matrix expands based on the questions and answers created. The initial question is blue, follow up questions are orange, and ending responses are green.

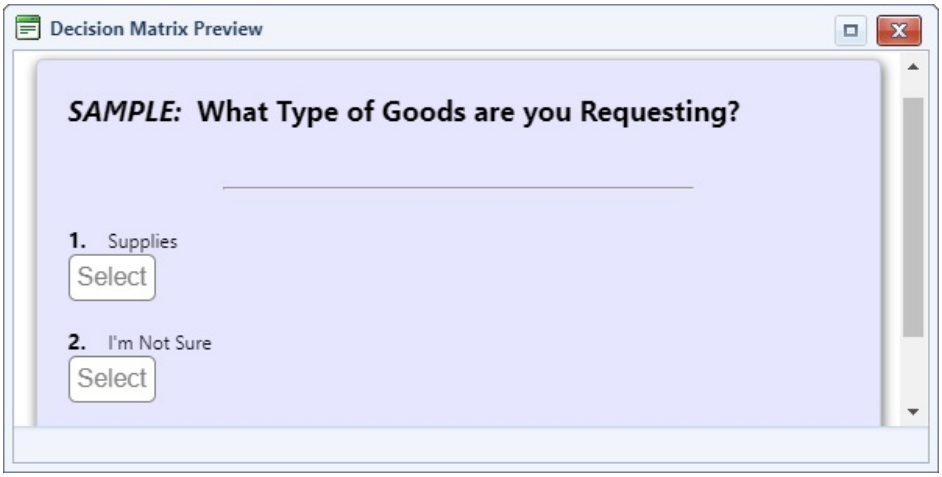
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Preview Questions and Answers

1. To preview a question or answer, click the question to preview and click the page icon  (page icon).

2. A pop-up displays with a preview of the question and the answers for that question.



3. To Delete an Answer or a Follow-Up Question, click the block to remove and click the **red X icon**  .

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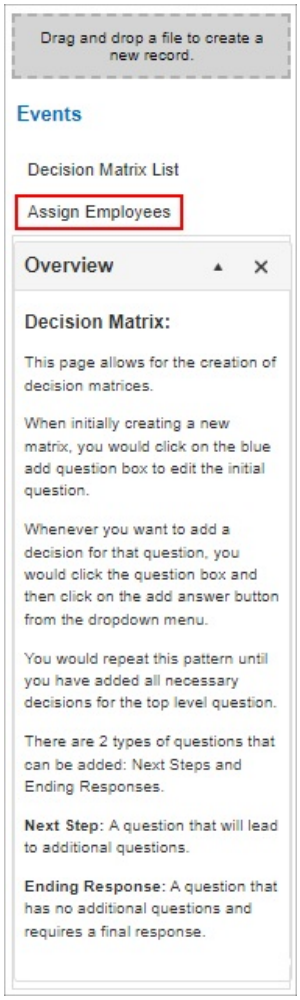
3. Assigning Employees to a Matrix

3. Assigning Employees to a Matrix

Assigning Employees to Decision Matrix

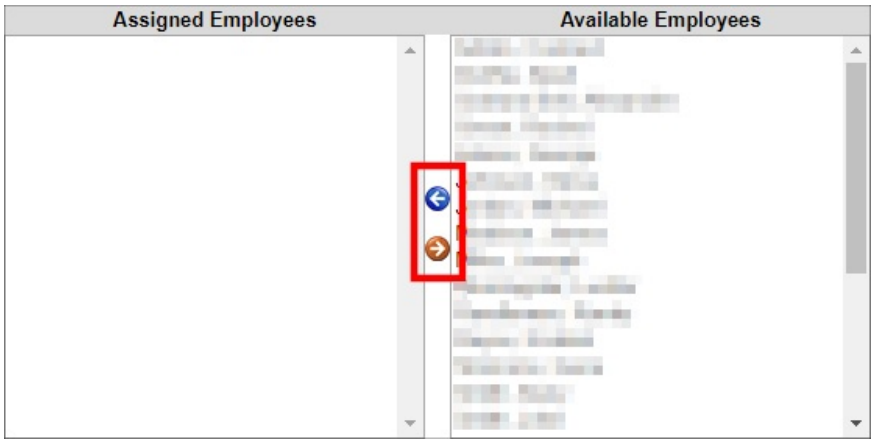
Once a Decision Matrix has been constructed, an admin can assign it to employees if the matrix was not marked as a Public Decision Matrix.

1. Click **Assign Employees** to assign the employees.



2. On the Assigned Employees Page, to assign or un-assign an employee, select the name of the employee and click the blue left arrow to assign an employee, or the red right arrow to un-assign an employee.

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Note: if a Decision Matrix is marked as Public, it is available to all users without specifically assigning them.

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Natural Language Processing (NLP)

Natural Language Processing (NLP)

Natural Language Processing (NLP) with VISDOM™

Overview

Oftentimes, when legal, contract risk, and procurement professionals review contracts and related documents that may bind organizations, they attempt to reduce risk for their organization. They may utilize numerous important clauses. With Natural Language Processing, users can teach VISDOM clause language to look for and to have it find similar language in documents as they are entered into CobbleStone.

As an organization grows, the volume of the risk reduction review duty increases and becomes tasking; little details may be missed if the professional is overworked, distracted, or rushed. It could be prudent for the individual and organization to teach the software program they use how to recognize similar items, such as text, phrases, and identifiable data (as listed above). This type of tool may be helpful with assisting the professional as an additional tool combined with the professional's personal review of the document. CobbleStone has evolved their text recognition engine with the introduction of VISDOM Artificial Intelligence. As software tools advance, it is still important to have legal documents reviewed by a legal professional such as an attorney. The tools discussed below are not intended to be used as legal advice as only an attorney should provide legal advice.

Example of Text Recognition with VISDOM AI

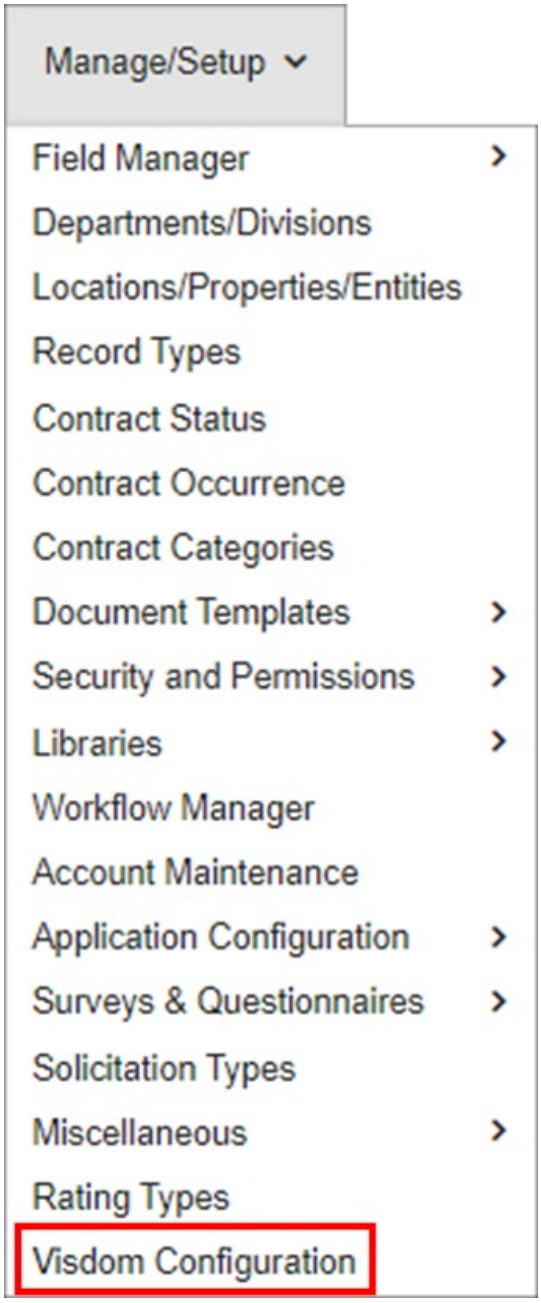
As we cover the topic of text recognition with artificial intelligence, it is important to understand that artificial intelligence is not perfect. For it to work on text recognition, one must consider the inherent challenges with reading and reviewing documents. First, the documents may not be in useful formats for the engine to review and recognize text. Second, the documents' text may be too small, bunched together, skewed, or degraded if the they were scanned documents or contain image or text over lay (even humans can have difficulty understanding text if the text is impeded), foreign text, or even pages missed. Once a document is introduced to the CobbleStone Software's contract entry screen the engine, if enabled in the Enterprise edition, attempts to review the document to see if it is text-based. If the document is not, the engine attempts to recognize text via optical character recognition (OCR) (which has inherent limitations). Once complete, VISDOM attempts to run the document text through the rules it was taught to help extract text, phrases, and identifiable information. If configured, it will try to place the extracted data in data fields to help with contract data entry. This may be helpful in assisting the professional with entry and review of contract documents. Think of it like a machine review of the document text based on rules taught to it.

Establishing a Natural Language Processing Taxonomy

The highest level of classification in the Natural Processing engine is a **taxonomy**. In short, a taxonomy is simply a means of classification. Before working with any data we must select or create a new taxonomy.

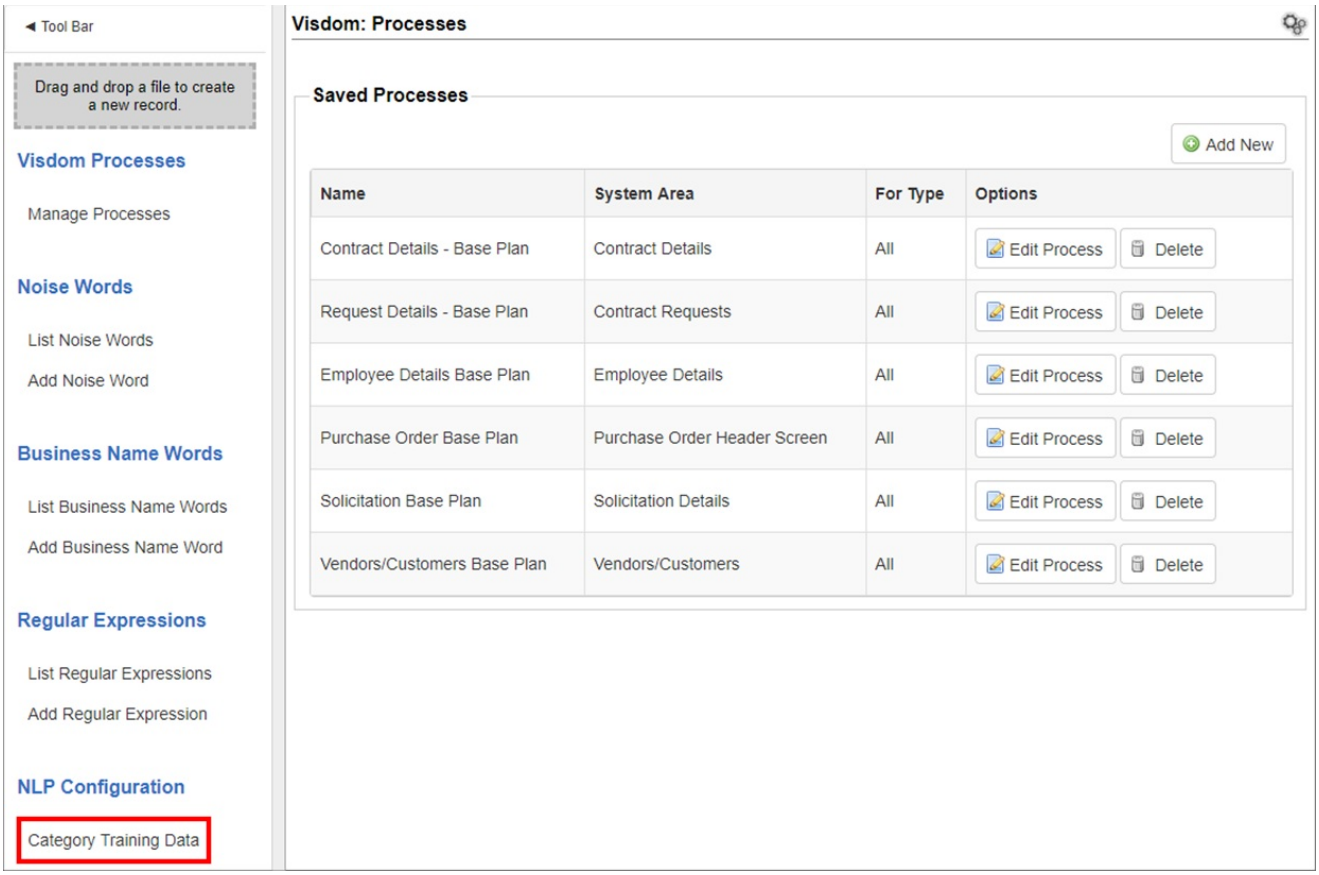
1. To Configure natural language processing records navigate to **Manage/Setup - VISDOM Configuration**.

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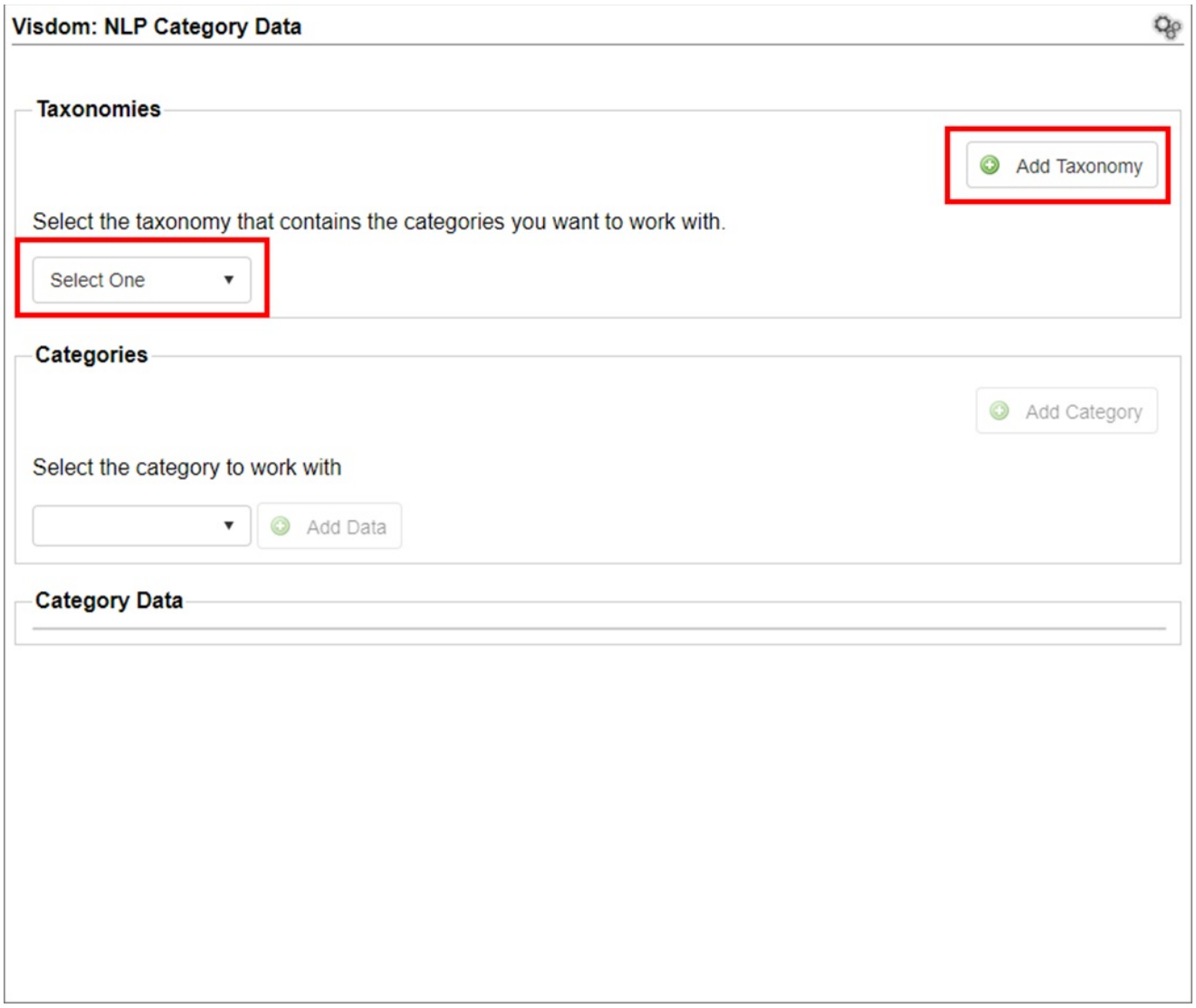
2. The **VISDOM: Processes** page displays. To work with NLP taxonomy, category, and data, on the side menu, click **Category Training Data**.

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2. The VISDOM: NLP Category Data page displays. Select the existing taxonomy with which to work or click **Add Taxonomy** to add a new taxonomy.

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Adding a New Taxonomy

1. Enter a name for the new taxonomy.

2. Click **Save**.



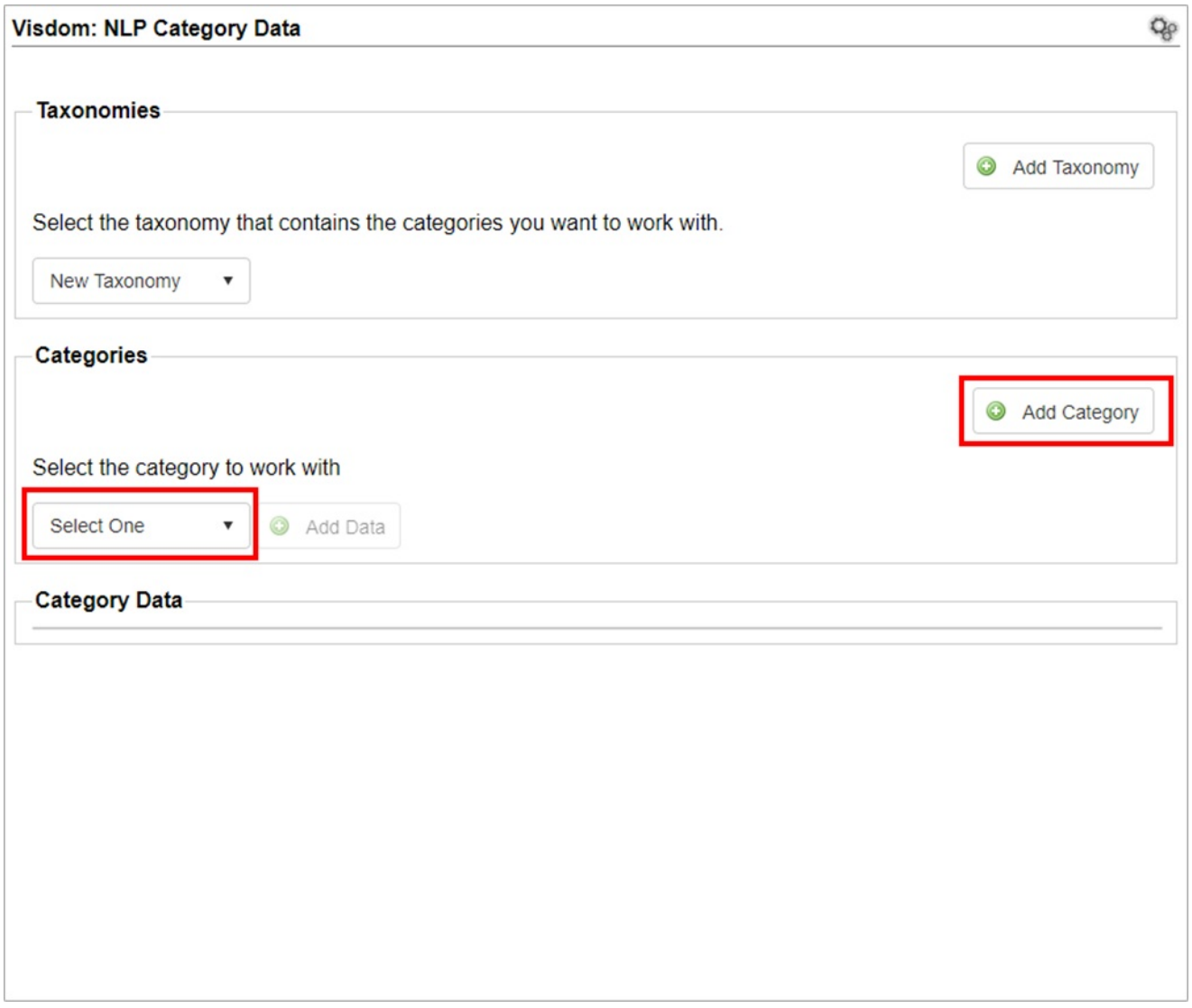
Establishing NLP Taxonomy Categories

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Categories are the next level of categorization after taxonomies. Categories are the clause types for which CobbleStone is being taught to search. For example, we might want a category for Governing Law clauses and a different one for Assignment clauses.

1. Select the desired taxonomy

2. Select the existing Category with which to work or click **Add Category** to add a new taxonomy.



Adding a New Category

1. Enter a name for the new category.

2. Click **Save**.

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Defining Category Data

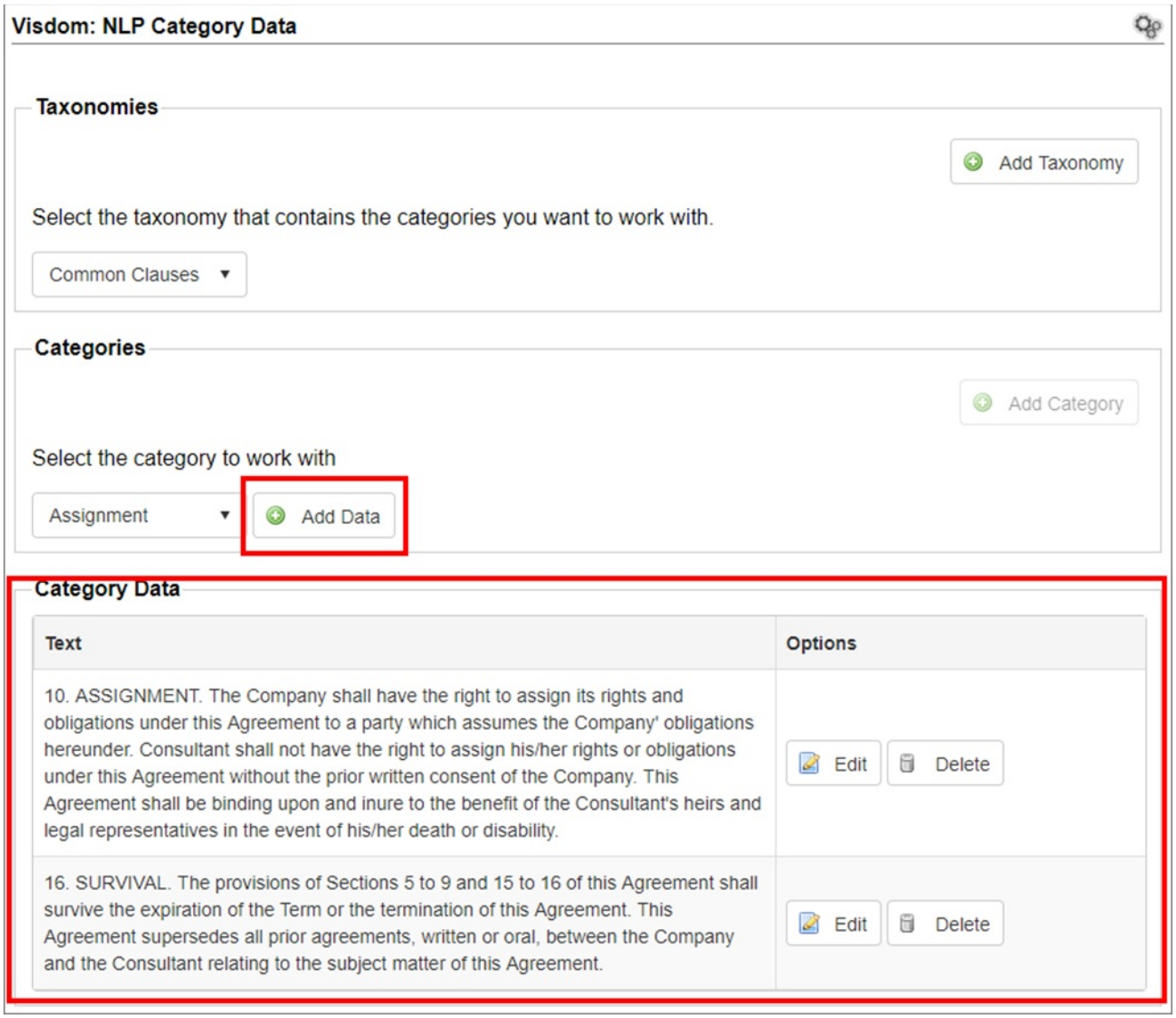
Category data is what drives the natural language processing engine and allows it to determine when a similar clause is found.

1. Select the desired taxonomy

2. Select the desired category

3. Any existing category training data displays below the category selection area.

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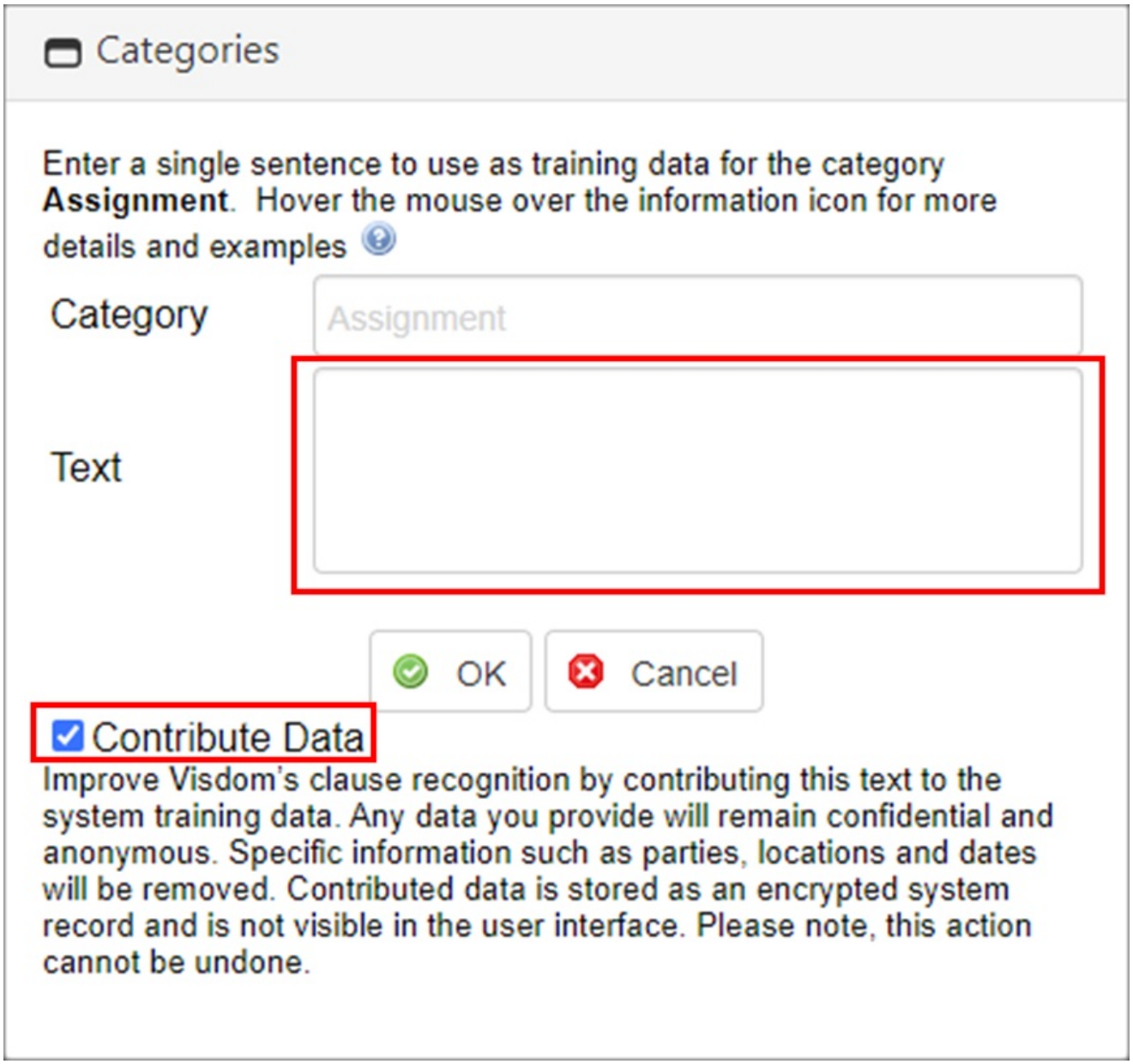


4. Click **Add Data**.

5. The Categories pop-up window displays.

6. Copy the data desired and paste it into (or type it into) the **Text** area.

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7. Optionally, system administrators can opt to include their clause data to the whole of the clause knowledge database of CobbleStone [SaaS] users and thus make the search more robust. Mark the Contribute Data tick-box to "improve VISDOMS's clause recognition by contributing this text to the system training data."

Please note that "...any data you provide will remain confidential and anonymous. Specific information such as parties, locations, and dates will be removed. Contributed data is stored as an encrypted system record and is not visible in the user interface. Please note: this action cannot be undone."

Best practices have contributions NOT be entered as entire clauses or paragraphs but as sentences or fragments. Doing so helps the system be able to pull out that language no matter the full text of the given paragraph/clause and thus better recognize them more broadly.

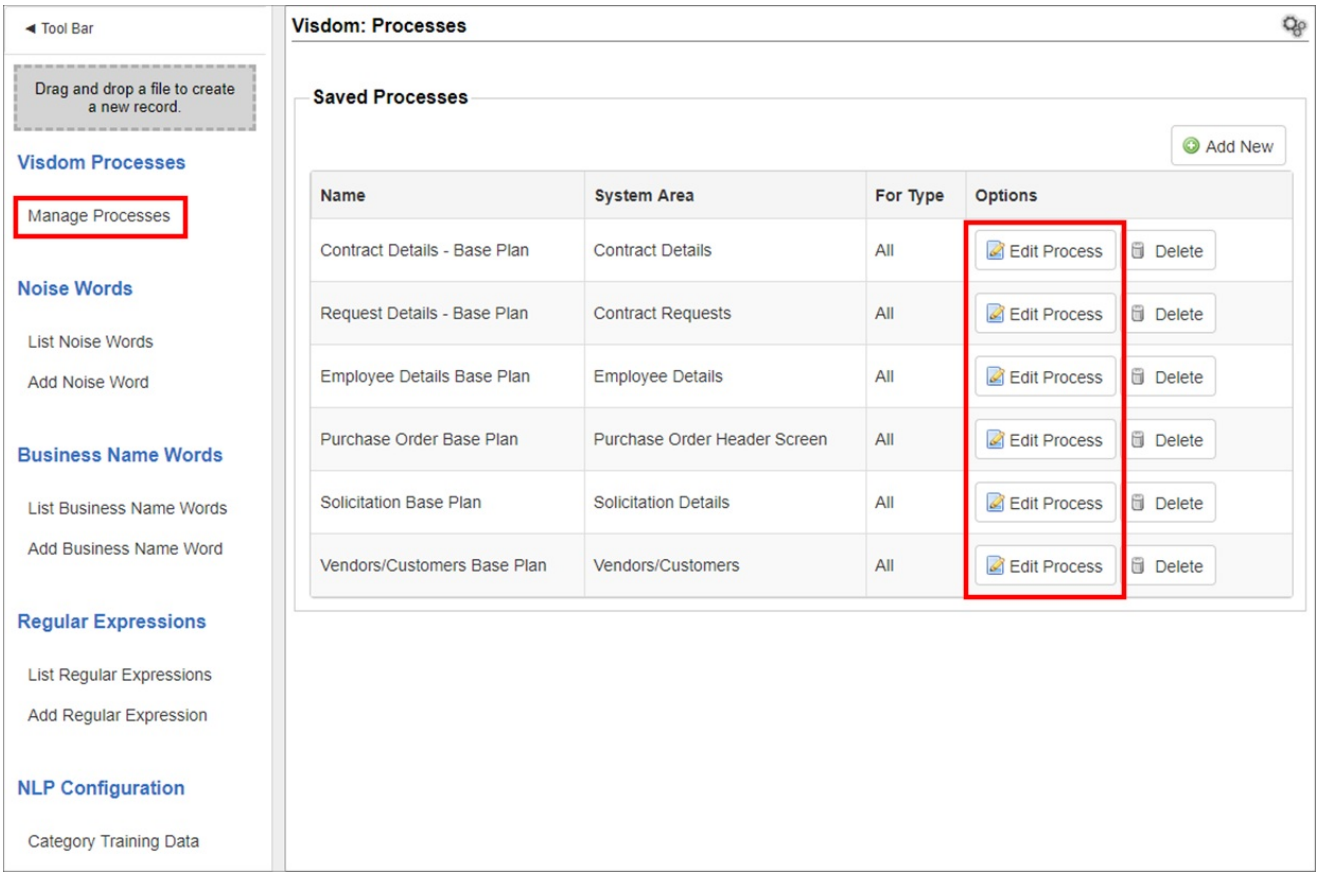
8. Click **OK**.

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CobbleStone can now use the data supplied to better recognize clauses. While CobbleStone can recognize clauses, we must configure the application to actually use the data it has learned. To do so, we must build a new [pseudo] field into which CobbleStone can place the various categories for a given taxonomy.

Pulling a Taxonomy against which to look for Categories

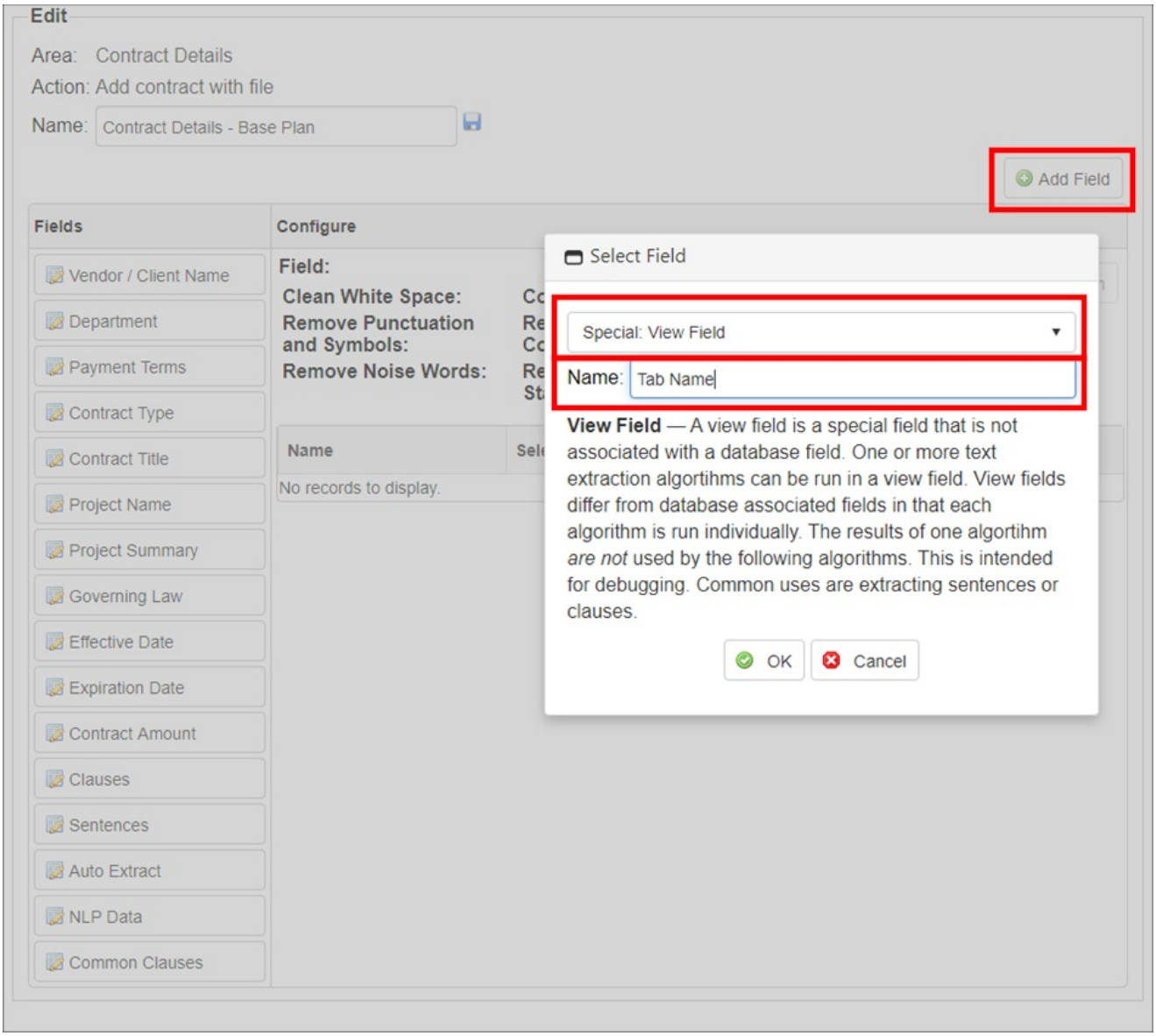
1. On the side menu, click Manage Processes to return to the **VISDOM process** list screen.



2. The VISDOM: Processes screen displays. Click **Edit Process** for the desired Process.

3. Click **Add Field**.

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4. A pop-up window displays. Open the field selection pick-list and select Special: View Field.

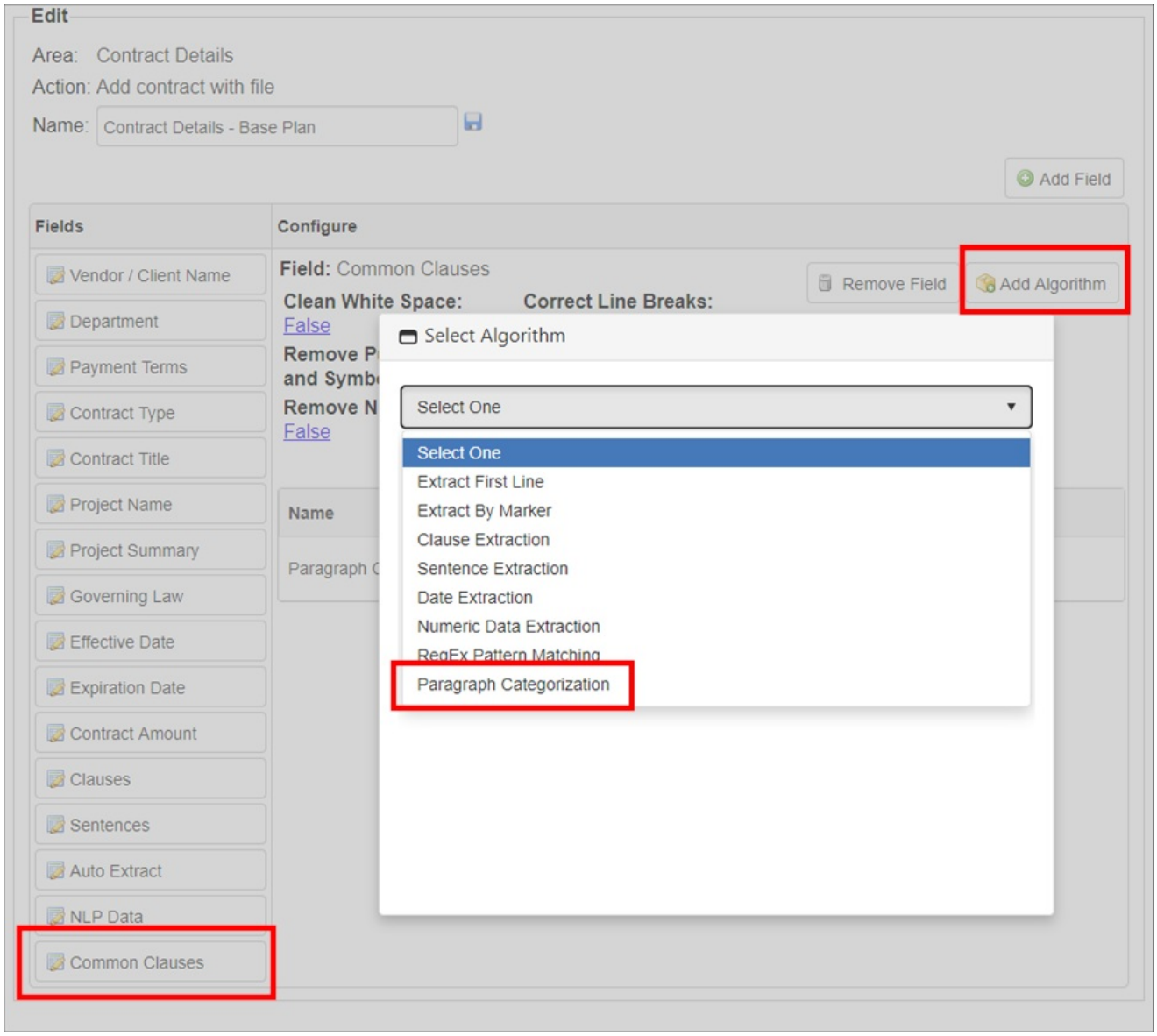
5. Provide a name for the new [pseudo] field. This name will be the name that displays at the top of a VISDOM read document and holds the category data recognized in the document.

6. Click **OK**.

7. The pop-up closes. Click the field just created.

8. Click Add Algorithm.

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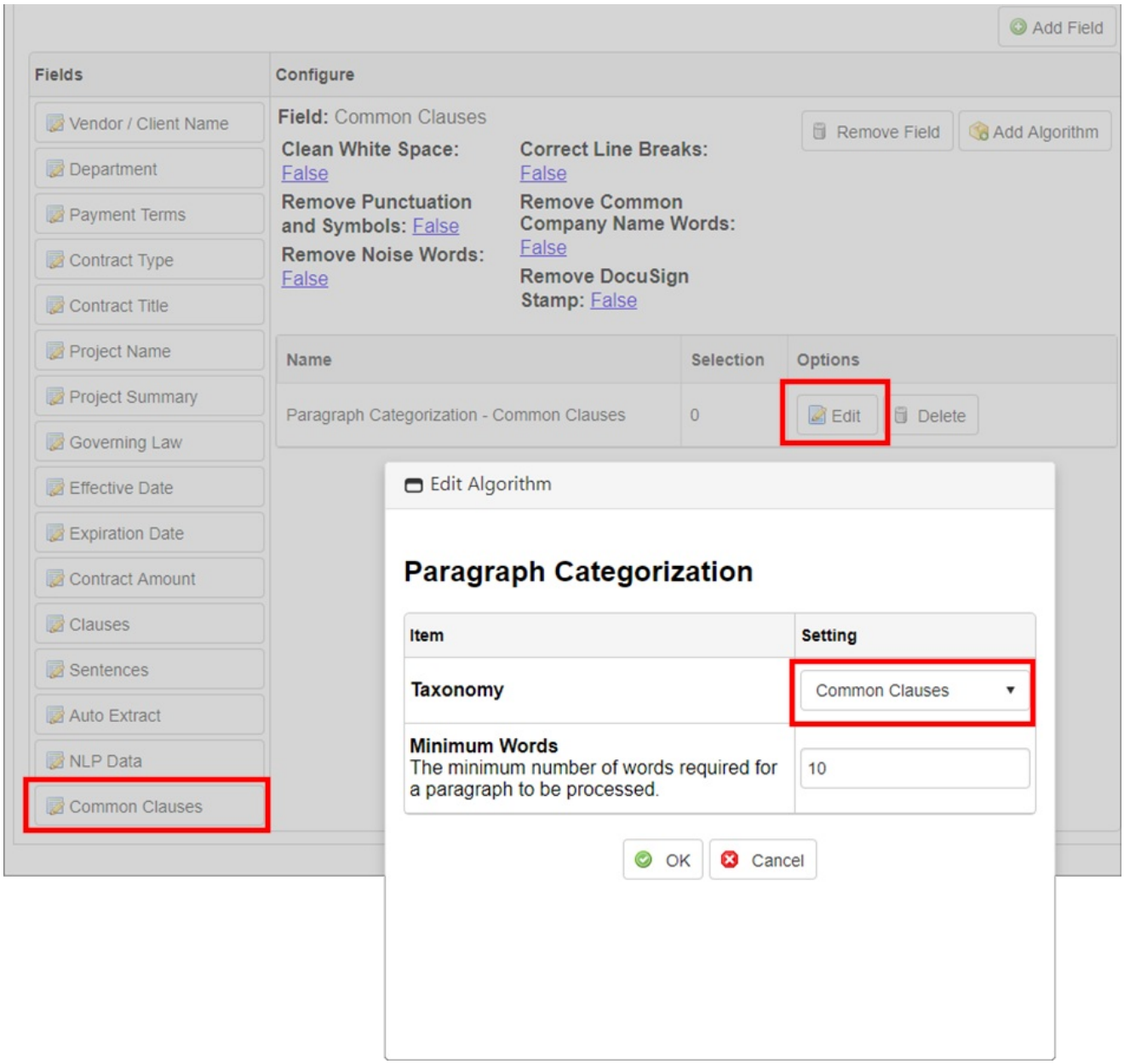
9. A pop-up window displays. Open the pick-list and select Paragraph Categorization.

10. Click **OK**.

11. Click **Edit** for the Paragraph Categorization algorithm.

12. A pop-up window displays. Select the desired taxonomy.

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13. If desired, alter the number of works required to process a paragraph in the **Minimum Words** field.

14. Click **OK**.

CobbleStone can now recognize the categories inside the taxonomy selected.

Pulling clauses into a field on the Add Screen with VISDOM

CobbleStone now, on the VISDOM add screen, displays the clauses it has located based on the categories in the taxonomy as based on the training data provided. To pull a clause into a field, however, we must add a field to our VISDOM Process and define it with a specific algorithm.

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1. Click **Add Field**.

2. Select the field into which the clause data is to be extracted.

3. Click **OK**.

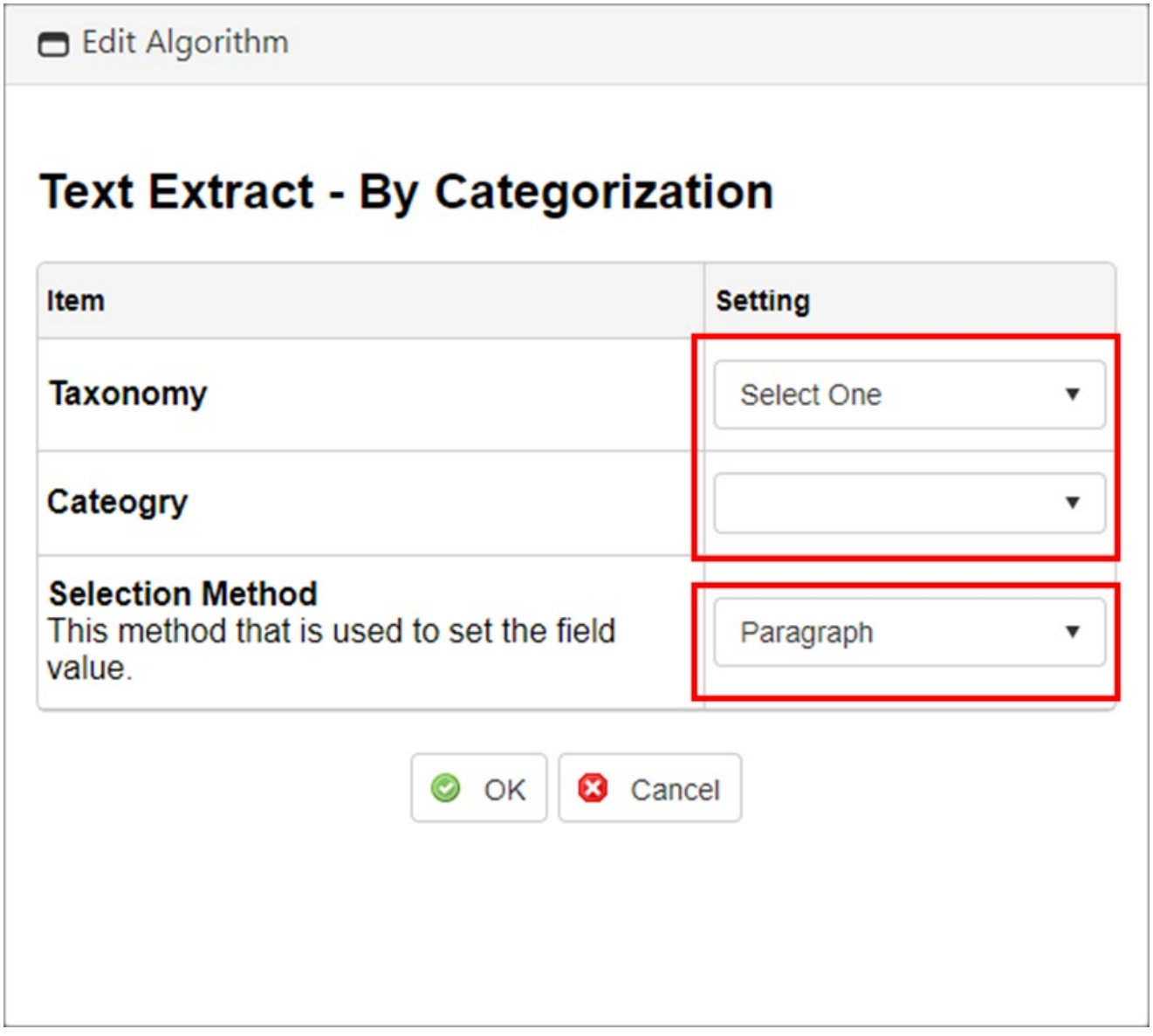
4. In the process, click the newly added field.

5. Click **Add Algorithm**.

6. A pop-up window displays. Select the Text Extract - By Categorization option.

7. Click **Edit** for the algorithm.

8. A pop-up window displays. Select the desired taxonomy and category for the clause to be extracted into the field.



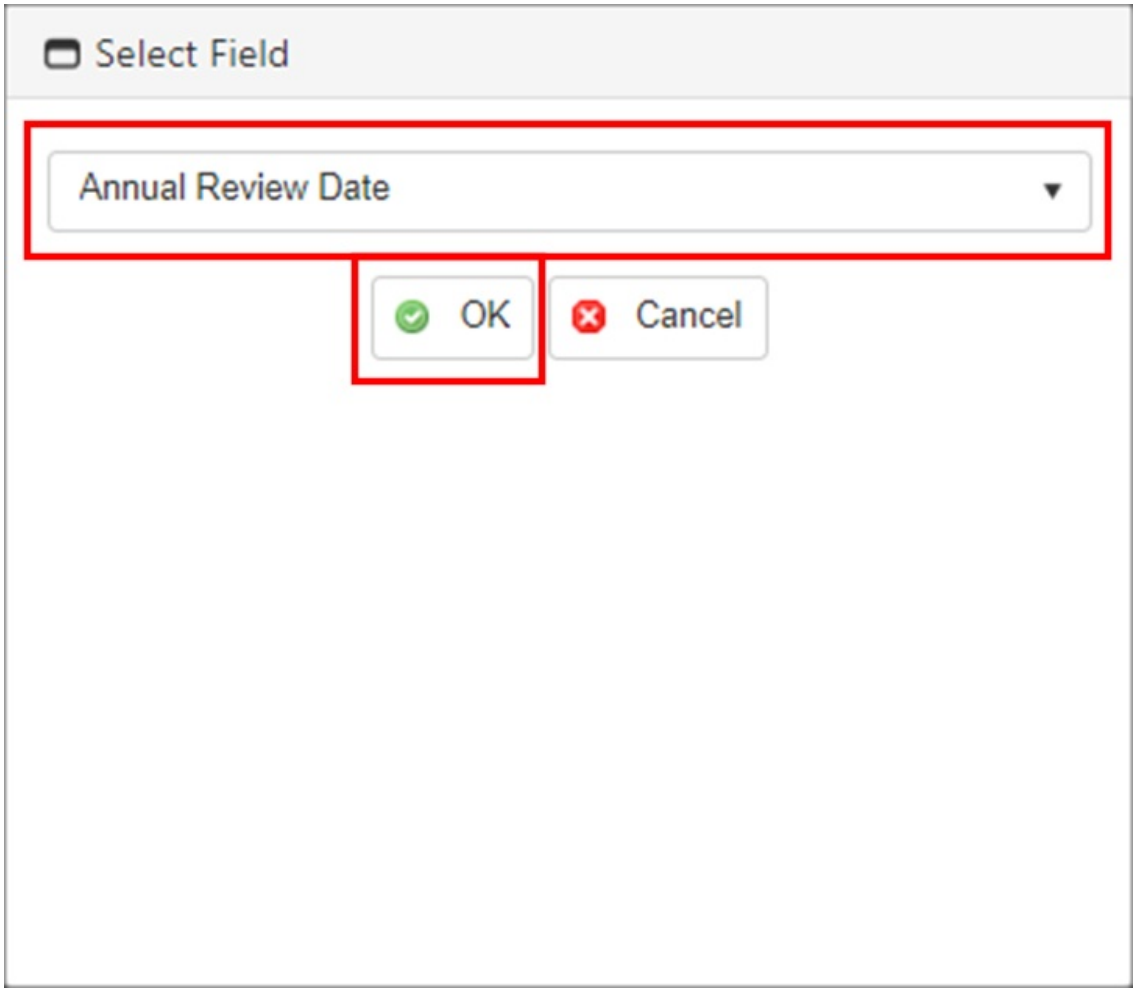
9. Select if the sentence or the paragraph in which the data is found is to be extracted.

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10. Click OK.

CobbleStone has now been configured to find not only clauses in the taxonomy but also to extract a specified found clause into a field on the add screen.

4. A pop-up window displays. Select the desired field from the table for the area selected for the process.



5. Click **OK**.

6. The pop-up window closes and the field list displays. An algorithm must be defined for each field.

Adding and Defining an Algorithm

Each field must have at least one algorithm defined so VISDOM can take the definition and apply it as text extraction rules.

1. Click the desired field for the clause.

2. Click **Add Algorithm**.

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3. A pop-up window displays.

Field Options

Each field selected has a set of six (6) options:

A. Clean White Space - Set to True to remove white space within a phrase when checking for a match.

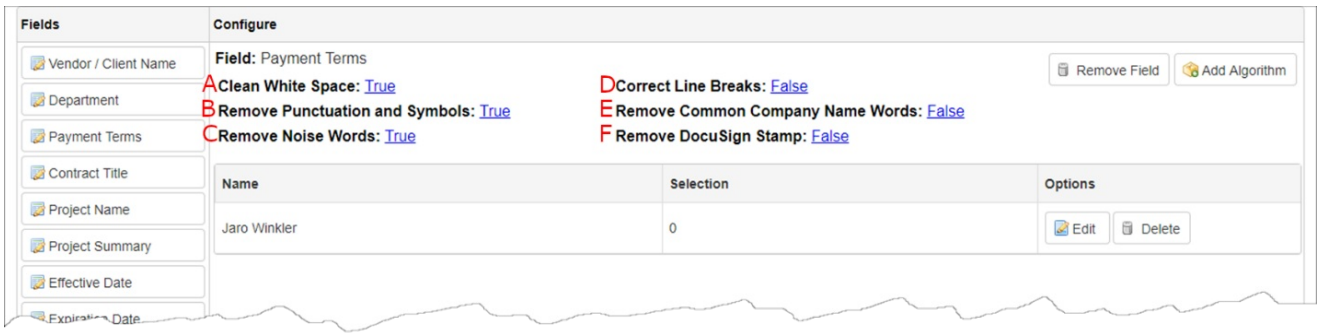
B. Remove Punctuation and Symbols - Set to True to ignore non-standard characters when checking for a match.

C. Remove Noise Words - Set to True to ignore words defined in the **Noise Words Dictionary** when checking for a match.

D. Correct Line Breaks - Set to True to review the text without line breaks/carriage returns when checking for a match.

E. Remove Common Company Name Words - Set to True to ignore words defined in the Common Company Name Words dictionary when checking for a match.

F. Remove DocuSign Stamp - Set to True to ignore DocuSign stamps when checking for a match.



Note: it may be impossible to configure for every scenario as each contract document is different.

Testing our configuration

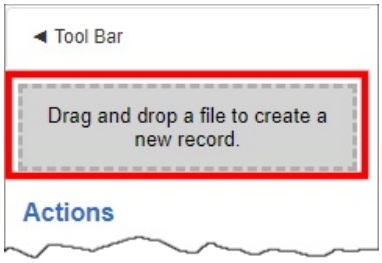
We can check our configuration by adding a new record with VISDOM.

1a. From the top navigation menu, select module and click **Add (record) with VISDOM AI**. While the example below shows the **Contracts** menu, other record types can use VISDOM AI too.

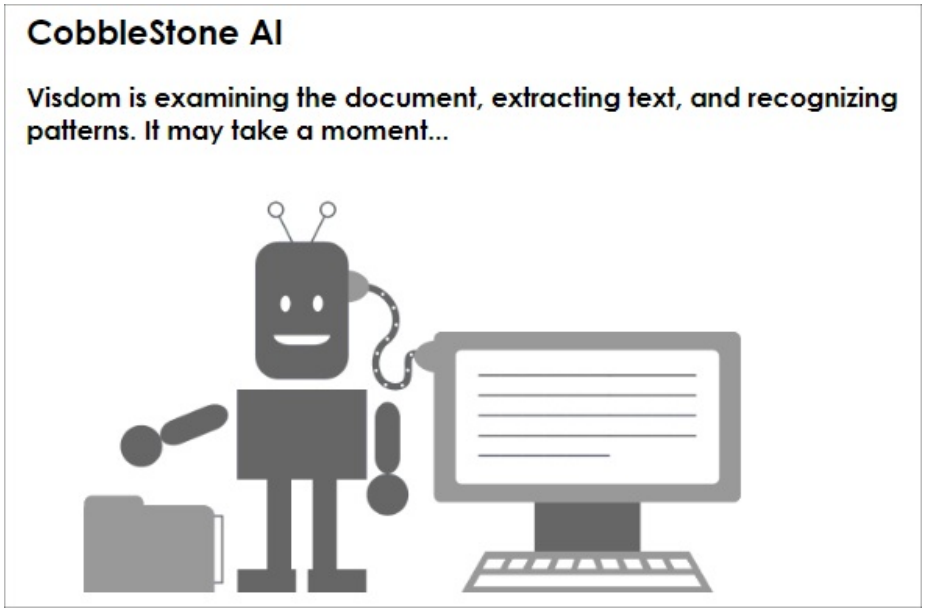
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1b. Alternatively, drag and drop the desired file onto the grey **Drag and drop a file to create a new record** box then select the module desired. This box displays at the top of the side menu.



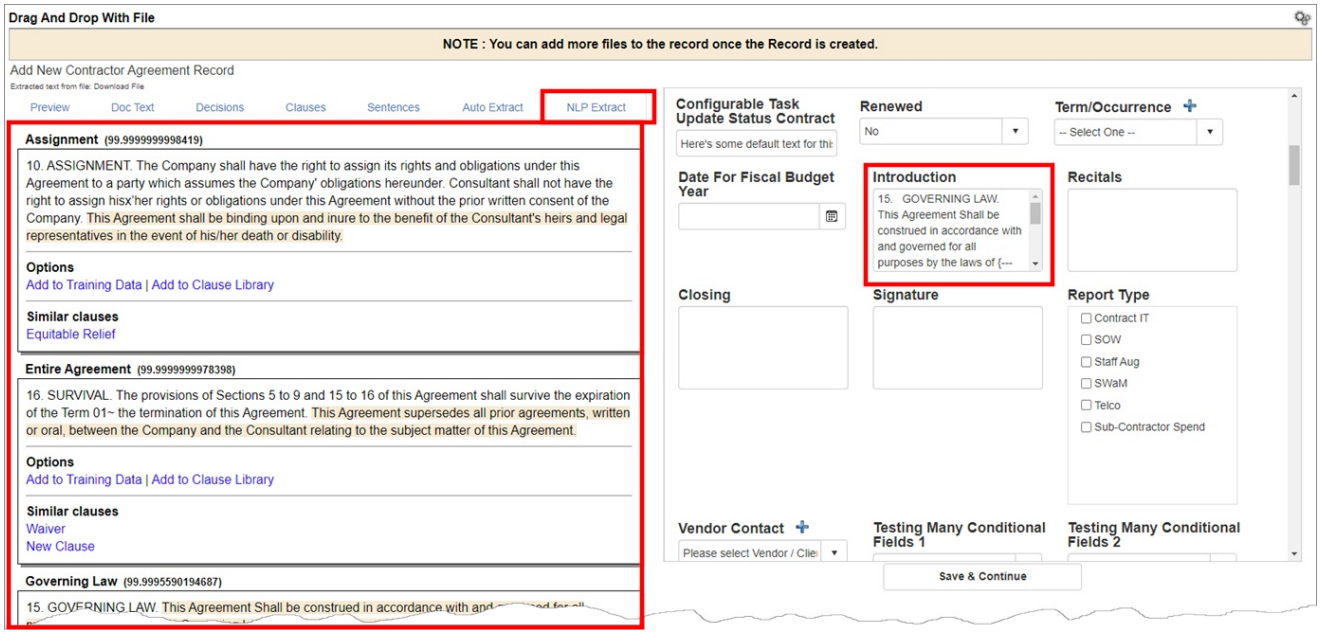
2. VISDOM tries to recognize the text and extract it based on the rules configured. In addition, VISDOM tries to extract the Title of the contract, check for intelligent data it learned from the systems counterparty names (vendor and customers), locations (city, states), employee names, e-mail addresses and identify this information as well (it learns from the data in the system).



3. After VISDOM's search and extraction are complete, we see the file and data entry and clause fields.

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4. Click the tab with the name of the View: Special field defined in the process to view all clause data recognized.



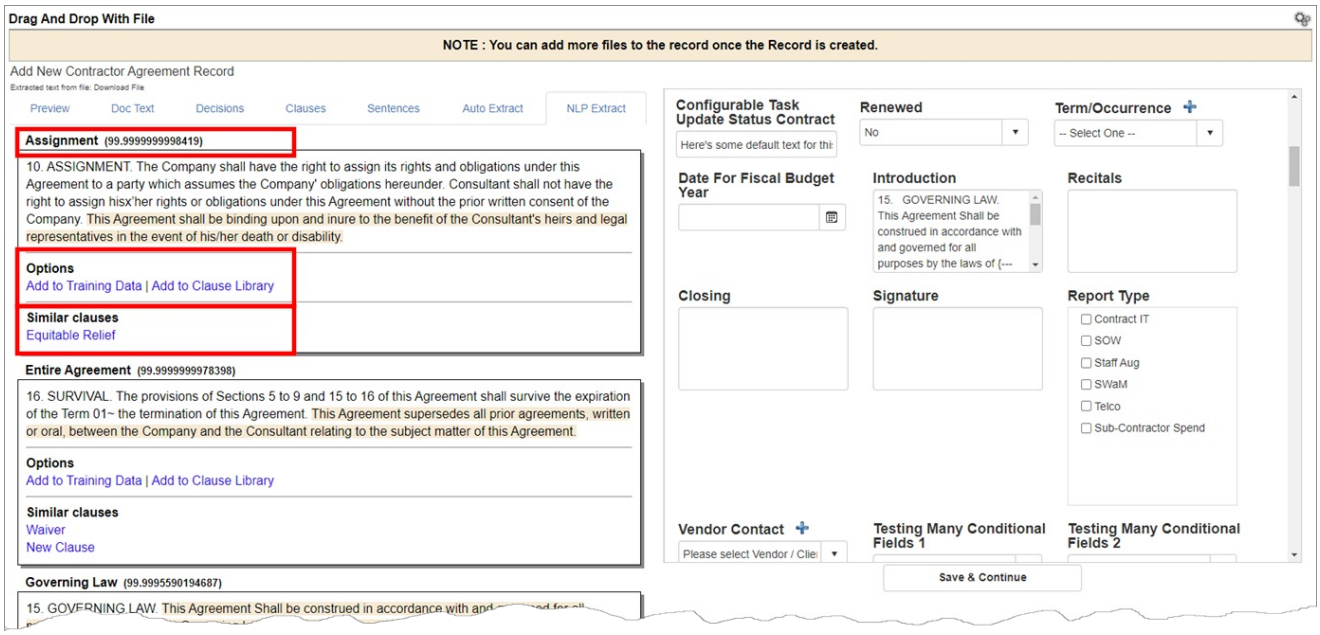
Along with any field data defined, in the example above, the **Governing Law Clause** was extracted into the **Introduction** field.

Note: It is recommended to review and edit the extracted text to ensure the text extracted is accurate and reflective of the data you want tracked.

Note: The text engine is not exact and a legal professional should review all legal documents.

Also visible on the tab are the percentage matched with the relevant training data, options to add the located clause to training data for the category and to create a **clause library** entry with the located clause, and finally clauses to which the located data is similar and could be considered for use.

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Risk Management with VISDOM Artificial Intelligence Overview

Risk Management with VISDOM Artificial Intelligence Overview

Risk Management Tools Overview

CobbleStone Software is packed with many risk management and risk mitigation tools. This document is not intended to be a comprehensive guide for risk mitigation and management as many of the CobbleStone features include risk management and often depend on the out-of-box fields, configured fields, configured rules, industry requirements, your organization policies & procedures, corporate legal advice, and creative usage of the tools covered in this document.

Basic risk tools

Some of the basic risk mitigation tools include:

1. **Keeping basic record tracking** such as tracking counterparties (vendors and customers), employees, contracts, purchase orders, sourcing needs, and requests.
2. **Enabling workflow tasks** for approvals on the records mentioned above.
3. **Using document templates** to ensure the proper clauses are used.
4. **Enabling e-signatures** to ensure signatures are obtained on important documents and stored in the system.
5. **Using on-screen alerts** to notify users if a record is out of bounds based on field conditions that you configure in workflow.
6. **Ensuring field validation** so your team is providing data for the fields your organization requires.
7. **Using ad-hoc reporting** to monitor many records based on conditions that meet risk criteria. Add the reports to a dashboard to quickly monitor outliers and schedule the report to email managers the report data routinely.

Advance risk management tools

CobbleStone also offers more advanced risk management tools:

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1. **Vendor/Customer risk score cards** are useful to measure items specific to a customer or vendor such as their revenues, their performance, their quality, the sensitive information your organization shares with the external party, and more The risk rating feature is a score card tool built into CobbleStone software that enables you to add a risk raking to each vendor and customer. The system tracks the item measured, the category, and the score and trends this data to provide a picture, a score card, of how well the counterparty is performing based on the rated category and/or measure. Additionally, it compares the vendor/customer to other counterparties in the system in the same rated category.
2. **e-Souring Bidder Rating** is a useful too (and required in public procurement) that enables your team to rate each bidder on a bid response (such as a Request for Proposal (RFP), or RFI, and other bid request). It gives the procurement team the ability to quantitatively measure a bidder's response based on rating category and document why the award was made to the best vendor. The system calculates the average rating provides ratings to enable comparative responses. For better cost control, enable **Line-item Bidding** to compare what bidder has the best price for a commodity or service when running a bid.
3. **Risk Assessment Profile Mapping tool** is a powerful tool to profile contracts and procurement records based on risk exposure items. The CobbleStone Risk Assessment tool is a rating engine that enables your organization to define risk categories for each exposure your organization has from contract or other risk items and enables your team to assessment the amount of risk for each exposure category and define the probability (or likelihood) the risk may occur. Overtime and as rate risk items (such as contracts, vendors, purchases, etc.) are rated, you can quickly find the risk items outside your company's acceptable range of risk. This provides a standards-based method to recognize risk and re-evaluate outlying risks.

Artificial Intelligence & Machine Learning

Artificial Intelligence & Machine Learning leverages advanced analytics and statistics combined with artificial intelligence, CobbleStone's VISDOM™ AI, to help further reduce risk.

Risk Mitigation with Artificial Intelligence with Correlation & Regression has been added to CobbleStone Software and helps by using advanced statistics to recognize risk and both positive and negative patterns. Once a pattern or a trend is detected via correlation and regression analysis, rules can be set to enable the CobbleStone Software AI Engine to make intelligent recommendations based on available data. This provides a standards-based method to recognize risk and re-evaluate outlying risks. For advanced intelligence, have criteria update over time to enable the systems to learn (via Machine Learning). For example, your risk team may want to find out if your financial exposure on services your firm provides is too high for the price of the contract. One would track the indemnification/exposure amount in a contract field along with the contract value for each contract record. The user can then use VISDOM to detect patterns and determine if the two data points are correlated and to help make recommendations. The VISDOM engine will inform you if there is a correlation, if the correlation is positive or negative (a positive correlation may be the higher indemnification exposure as the contract value increase). the rule can be saved and reprocessed to re-evaluate this risk periodically. As a benefit, it can provide onscreen alerts if there are outliers (such as "this contract has 20% higher exposure versus similar contracts"). Moreover, VISDOM measures the amount of indemnification (or financial exposure to your company) for similar services related to the contract price.

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Text and Word/Phrase Mining of Document Text Contract Language, Clauses, Terms.With VISDOM artificial intelligence, risk detection of phrases, words, and clauses is easier. The system reads document text and makes recommendations based on the information learned. For example, a good risk mitigation practice is to review terms, conditions, and requirements in contract language to determine if the contract is of an acceptable level of risk to your organization. Next, the risk manager (or attorney) determines if the risk can be mitigated by an addendum to the terms, a new contract at renewal time, or implementation of risk mitigation controls and monitoring. Included in CobbleStone Software Enterprise Edition is a risk engine to help read contract document text, extract text and terms from files quickly, and provide alerts for outliers or items that may be risky to the organization. For example, risk analysis can be used to detect the governing law clause. You simple teach (configure) the rules engine to recognize the term governing law (and applicable variants thereof). Then the next time a contract record is uploaded, VISDOM will review the document and extract text in proximity to the phrase governing law.Another example is searching for PII, personally identifiable information. If you want to review contract documents [when loaded to the system] that contain personal information such as an employee name, email address, customer name or email address, bank routing numbers, or credit card numbers. VISDOM can check the document against the counterparties and employee contact information in Cobblestone Software and extract the data.Additionally, VISDOM can recognize patters that it has been taught to locate money, social security numbers, bank routing numbers, and other sensitive data in documents. This process is great for detection of words, phrases, and risk data when new contract is added. Keep in mind that this is not an exact process as text may be derived from scanned documents, OCR which is not perfect, and the terms of a contract may be offset by other clauses and exhibits. Always have an attorney review your contracts for legal interpretation. See below to perform mass extraction on existing documents.

Bulk Extraction of Text and Clauses in Document Text and Contract Documents.With VISDOM artificial intelligence, bulk extraction of phrases, words, and clauses is easier. For example, you are a new general counsel or risk manager and need to find out into which contracts your company has entered to have an option to purchase properties under lease. If you have 100 lease documents to review, that review may be easy to do as a human. However, if you have thousands of contracts to read and review in a short amount of time, this would be incredibly time consuming for a human, but it is easy to load the contract files into CobbleStone Enterprise Software, let VISDOM detect the text, and then run a job to detect words and phrases and extract the text for legal review. For this example, we just enter in the words we want VISDOM to find, such as option to purchase, purchase options, purchase, and other variants of this word or phrase. Next, we let VISDOM review/read all the text files in its data store and extract the paragraphs and words in proximity to each of these words/phrases it was taught. VISDOM then provides a spreadsheet of each file that contained these words/phrases and the text in proximity to the words/phases. A risk manager or a legal profession can then interpret the results. This process is great for detection of words, phrases, and risk data for a large amount of contract documents. Keep in mind that text extraction is not an exact process as text may be derived from scanned documents, OCR which is not perfect, and the terms of a contract may be offset by other clauses and exhibits. Always have an attorney review your contracts for legal interpretation.

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Risk Management with Analytics, AI, and Machine Learning

Risk Management with Analytics, AI, and Machine Learning

Risk Management with Artificial Intelligence, Machine Learning - Advanced Analytics

CobbleStone Software offers the **VISDOM™ risk engine** that leverages statistics, artificial intelligence (AI), machine learning (ML), and advanced analytics to help reduce risk and recognize patterns with structured data. Artificial Intelligence, along with correlation and regression, has been added to CobbleStone Software Enterprise Edition to help with using advanced statistics to recognize risk and positive and negative relationships of data and patterns. Once a pattern or a trend is detected via correlation and regression analysis, rules can be set to enable the CobbleStone Software AI Engine to make intelligent recommendations based on the data and rules configured and it can learn. It learns not only from the configuration it receives but adjusts based on new data and patterns found. This provides a standards-based method to recognize risk and re-evaluate outlying risks and make new recommendations over time.

Note: Regression and statistics are a complex area of mathematics and should be confirmed by a qualified expert. To confirm your analysis, seek legal advice from an attorney and confirm statistic with an actuary or qualified personal.

Getting Started

Configuring and teaching the Risk Engine (a regression example)

Oftentimes, professionals know their data and the trends related to their data as they are typically experts in their field or they simply were taught by anther “expert”. In mathematics, to confirm if the data meaningful there are mathematics tools built to test data and its relationship to each other. In other words, there is a math to confirm our thoughts and hunch on how data may be related. VISDOM Risk Engine attempts to make it simpler to use these tools and test data. A System Admin user can utilize these tools documented in the Testing Data for a Regression and Risk Analysis section of this documentation. [To perform a test of the data you want to analyze, log into the system as a System Admin user. Note, these tests are not stored in the system, they are just tools to confirm the relationship of data. The Risk Analysis with regression engine can be found under the **Manage/Setup - Application Configuration - Risk Analysis Configuration** menu.

Once the data and two data points have been confirmed as having a strong relationship or are defined by your organization, VISDOM can utilize these risk analysis tool in the CobbleStone Risk Analysis Engine. If, in your system, your team did not track the data fields needed for your analysis, it is easy to create a user-defined field on the main objects (such as Contract, Vendor/Customer, Employees, Purchase Orders, Sourcing, Request screens) in CobbleStone Software documented elsewhere in this Wiki.

Our example: In our example, we assume that we provide engines for lease to our customers. The engines are leased under an Engine Lease Contract for twelve months and are offered at one engine per lease. The customer may lease several types of engine include a 200 Horse Power (HP) engine, 400 HP engine or a 600 HP engine. Below we will use the Risk Engine to detect if the lease value (the contract amount) of our contracts is higher based on the type of engine we lease; greater HP equates to a higher price. To utilize regression and advance analysis for risk mitigation, navigate to the Risk Analysis home scree and click **Add Definition**.

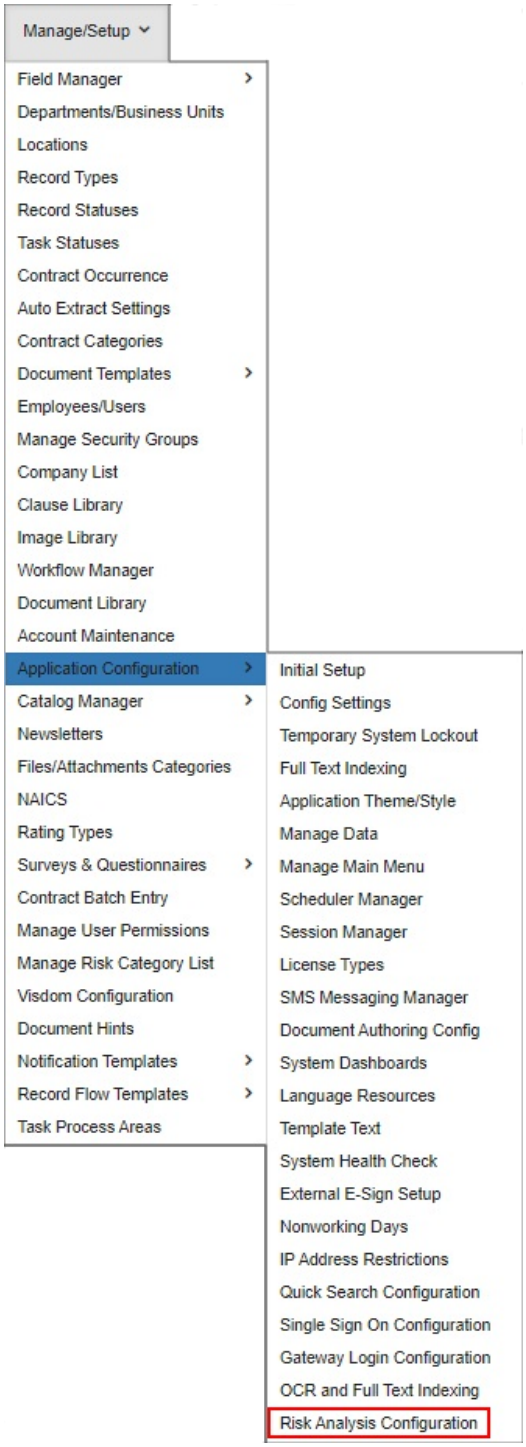
Creating a Risk Analysis Definition

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Since, we lease three engines types: a 200 HP (horse power) engine, a 400 HP engine and a 600 HP engine, we want to check that the contract data we track when we lease an engine is priced higher for a larger HP engine. For this example, we must first look at the data just for Engine Leases that are either 200 HP, 400 HP or 600 HP. Since, this company makes most of is revenue from 600 HP Engine Leases, we will analyze (filter) the data for 600 HP Engine Leases.

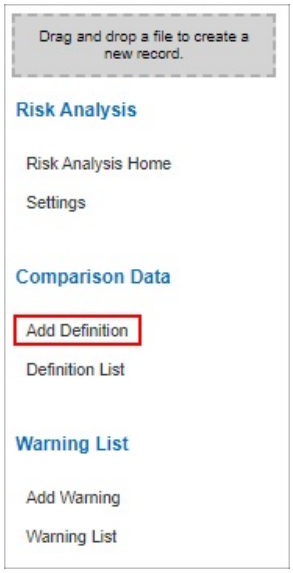
1. Log in as a System Admin user.

2. From the main menu, select **Manage/Setup - Application Configuration - Risk Analysis Configuration**.



3. The **Risk Analysis testing tool** home page displays.

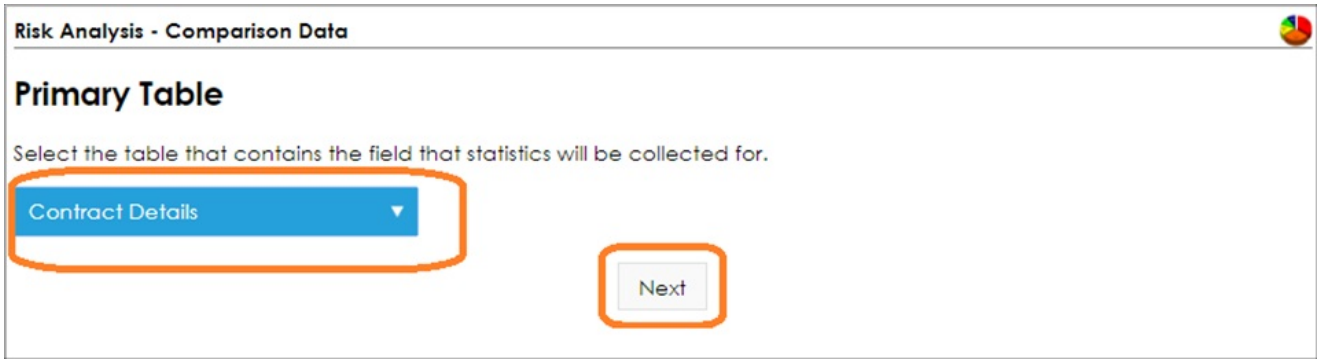
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4. Click **Add Definition** on the side menu in the **Comparison Data** section.

5. Like during Risk Analysis Testing, select the **Primary Table** to narrow the data source we want to analyze. For this example, we will use Contract Details as we want to base our risk monitoring for this example [or business case] using the data fields on our contract records.

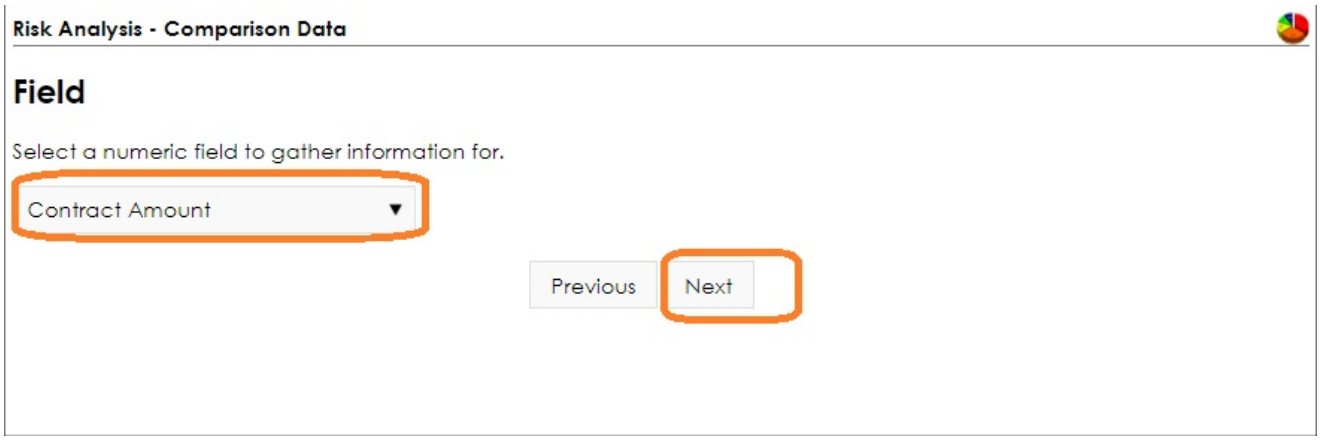
6. Click **Next**.



7. Select the first field variable to configure for the analysis. In this example we want to confirm the Contract Amount as it relates to the engine horse power rating, so we select Contract Amount.

8. Click **Next**.

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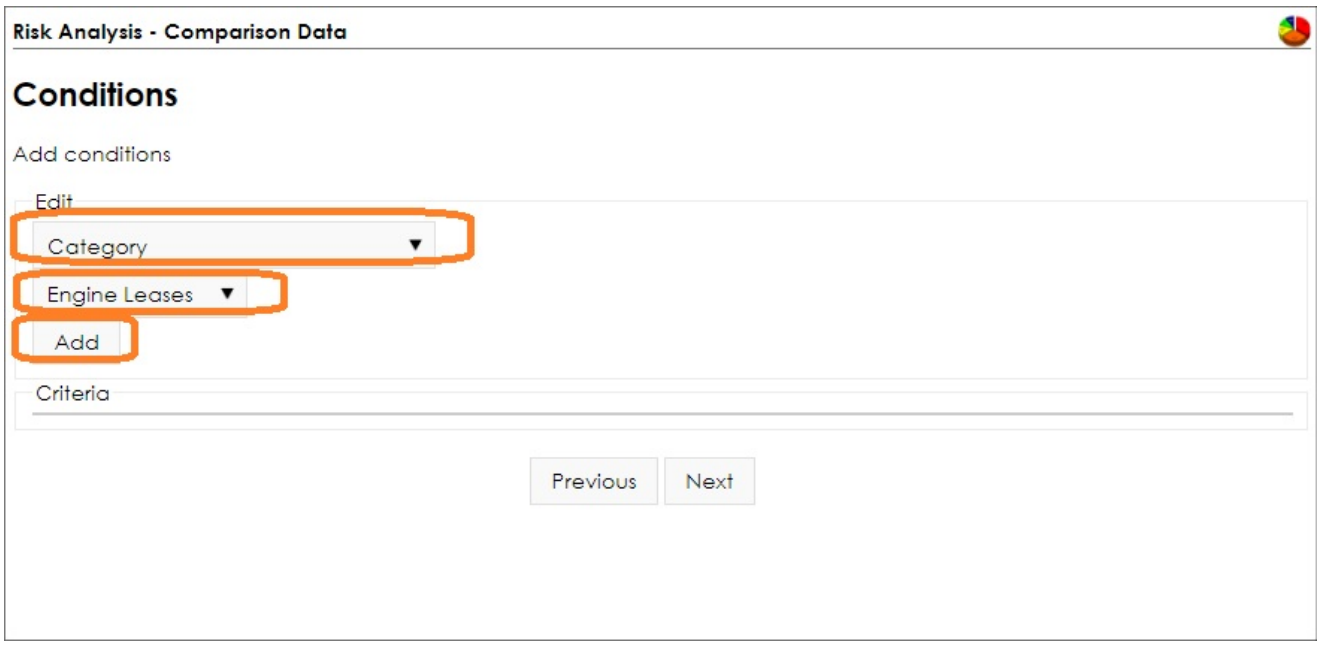


Next, we added two filter conditions to only have the analysis engine look at Engine Leases that are 600 horse power, so we need to set filter conditions for both the Rating Category fields for this purpose.

9. Set the **filter conditions** based on the field(s) and field value(s).

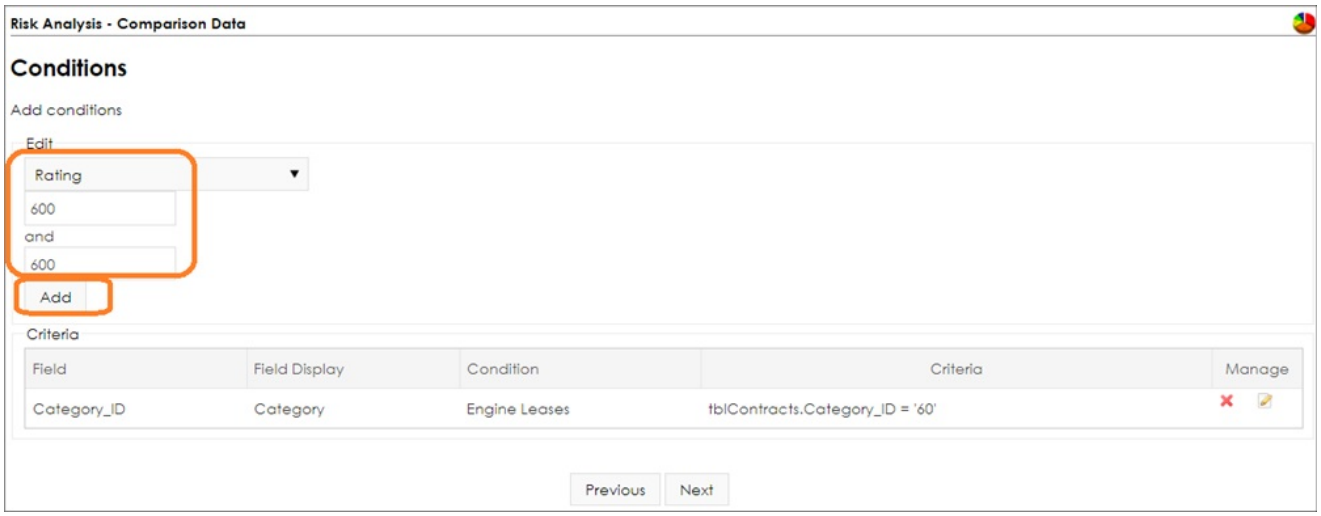
Since we only want to look at Engine Leases (and not Non-disclosure Agreements, Employment Agreements, or any other agreements for this analysis), we need to set a filter on the Category field, so we only include Engine Leases. Next, we need to set a filter condition on the Category field where it equals Engine Leases. In your business case, select the appropriate field or filters.

10. Once set, click **Add**.

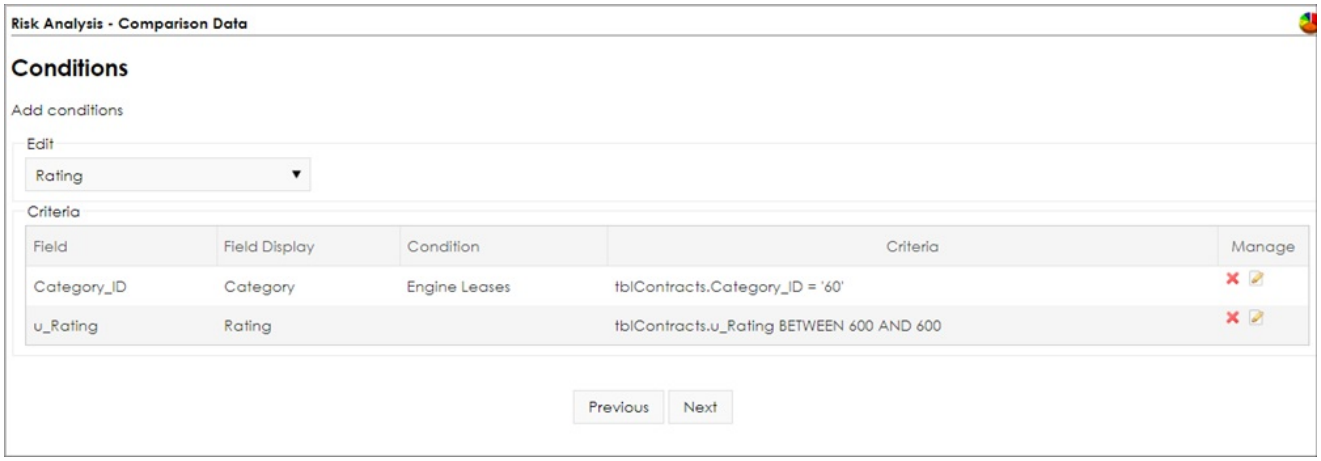


Next, we need to a filter condition on the Engine Rating (rated horse power) where the Engine Rating is between 600 and 600 since we just want to define this rule for 600 HP engine leases. Since we know our data, the Rating Field is be used for this filter condition.

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11. After setting all the conditions, review and modify the them as necessary. To edit a condition, click the **pencil icon** ( ). To delete a condition, click the **red X icon** ( ).



12. Click **Next**.

Machine Learning Schedule

Since we want the risk engine, VISDOM, to learn from the new data and contracts that are entered and from changes to any existing contract data, we schedule it to learn from the data based on a schedule. Just image if the sales team increases the pricing for engines. The system can learn from this new pricing change based on the new contract data it finds. For this example, we will have the Risk Analysis Engine learn and adjust what it finds monthly.

Setting the Schedule

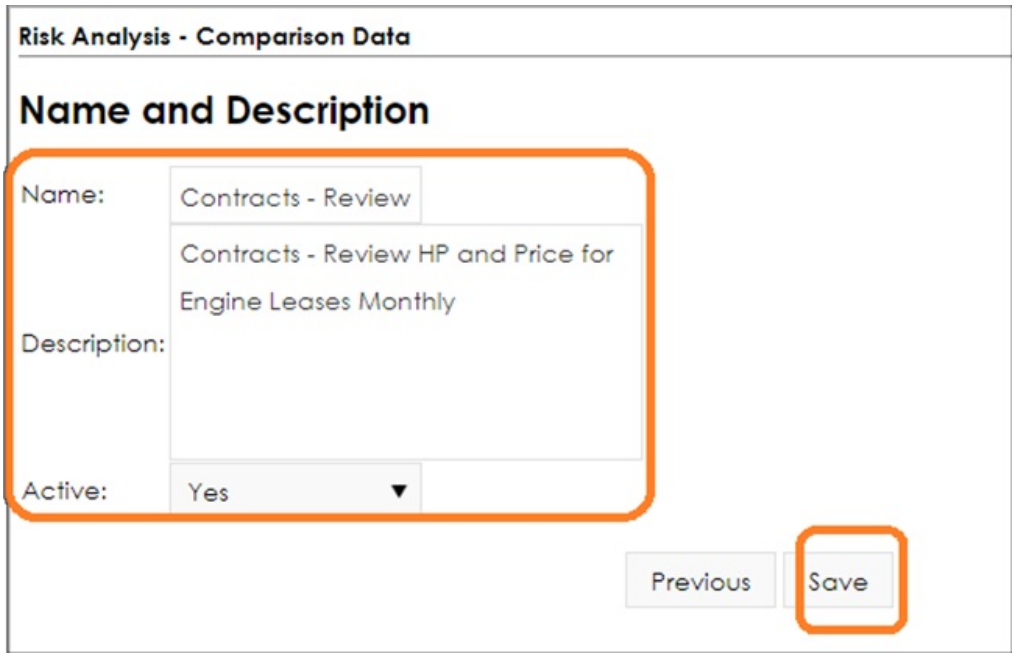
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Note: setting the schedule to more frequent, like Daily will enable the engine to learn from the new data faster. But if the data does not change daily, it is wasteful to have the engine run too frequently. In most cases, statistics need a lot of data to work well (or a large sample size). It may be better to adjust Monthly if you want to smooth data (such as for averages and cycle trends) or you may want to set the scheduler to a longer period.

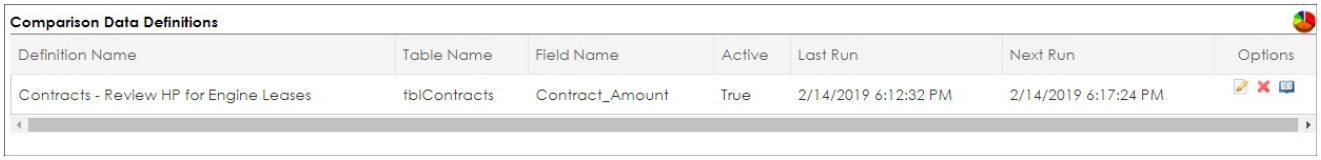
1. Give the Risk Analysis job a **Name**, set a **Description**, and mark it as **Active**.

2. Click **Save** to save the risk management machine learning job.



3. The **Comparison Data Definitions** screen displays with the saved analysis configuration.

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4. To edit (or review) the Risk Analysis job setting, click the **pencil icon** ( ).

5. To delete a Risk Analysis Job, click the **red X icon** ( ).

6. To view the analysis the job and the data gathered, click the book icon ( ).

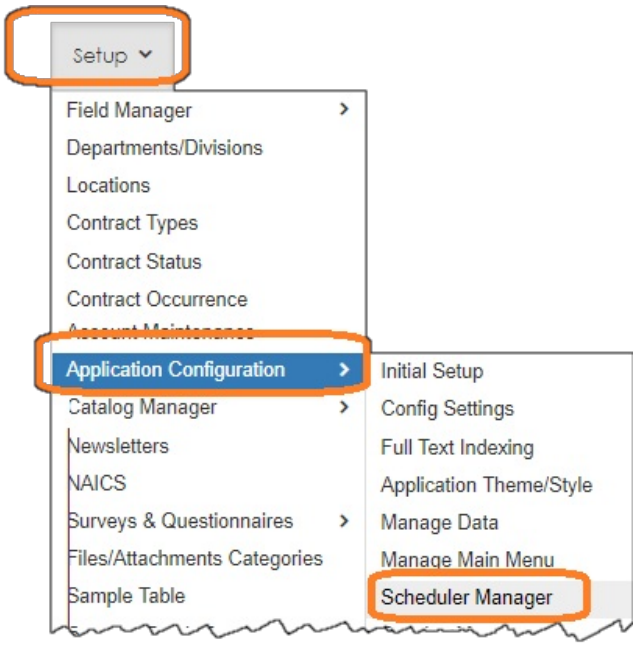
Note: To view the analysis the first time, run the Risk Engine job scheduler. In our example, we set our job to run monthly and it has not been a month since we scheduled the job (see Manually running the Risk Engine Scheduler below).

Manually run the Risk Engine Scheduler

To manually run the Risk Engine Scheduler job:

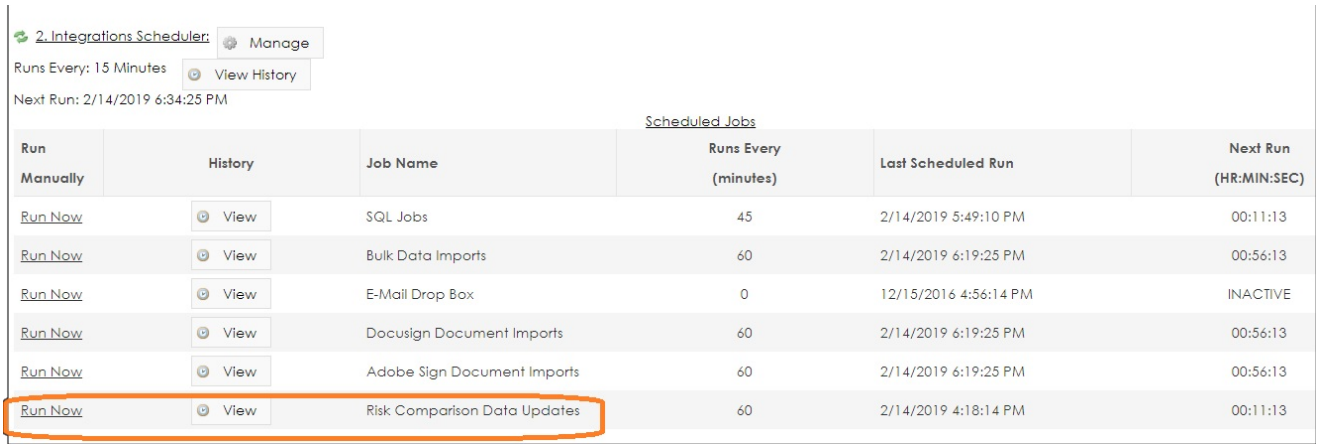
1. Log in as a System Admin user.

2. Navigate to **Manage/Setup - Application Configuration - Schedule Manager**.



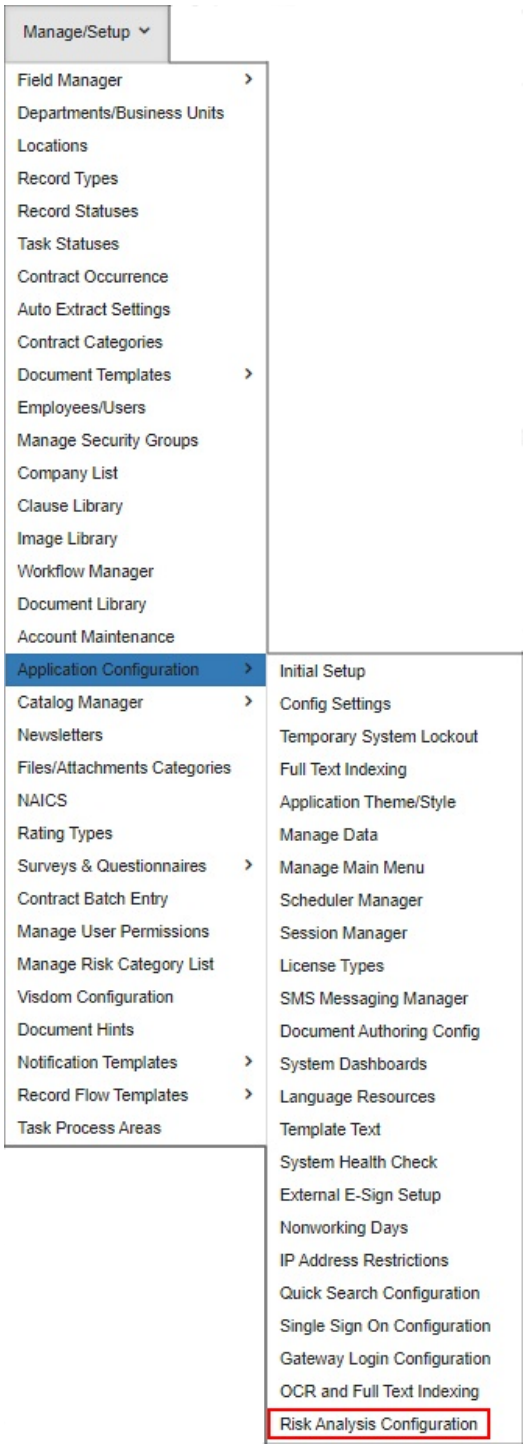
3. Locate the **Risk Comparison Data Updates** schedule [see below] and click **Run Now**. Give it some time run as complex analysis takes time.

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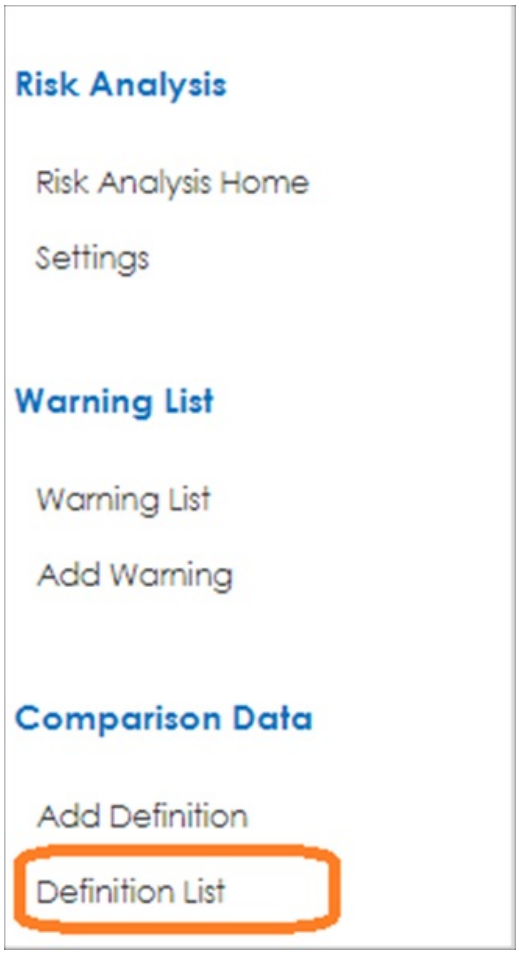
4. Once the job runs, navigate aback to the **Risk Analysis Configuration** menu.

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5. On the side menu, click **Definition List**.

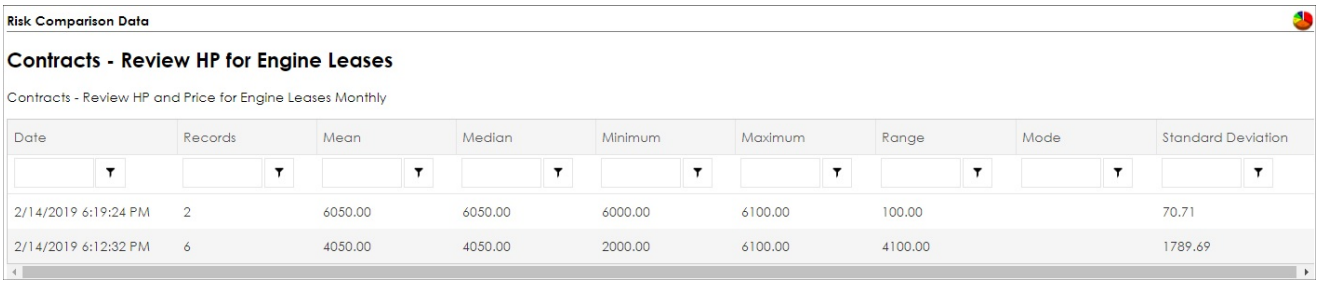
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6. The **Comparison Data Definitions List** appears, click the **book icon** to view the results.

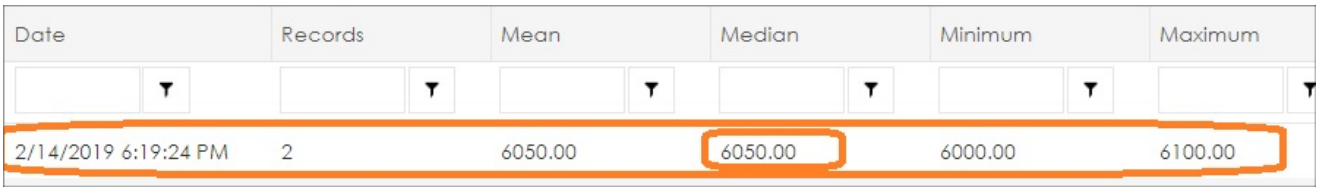


7. The data from the schedule is found in the **Risk Comparison Data** details screen.



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Now that we have the data analyzed, we can interpret it. We can see that the Median (average) price for a 600 HP Engine Lease is $6,050.00 and the Minimum value is $6,000.00 and the Maximum value was $6,100.00.



Date	Records	Mean	Median	Minimum	Maximum
2/14/2019 6:19:24 PM	2	6050.00	6050.00	6000.00	6100.00

Now that we have this useful data, we use it to help our staff and company. Let's imaging a sales person sells a 600 HP Engine Lease for $7,000.00 dollars. That is good; they sold the engine lease at a contract value higher then highest deal for a similar engine. We can show our users positive reinforcement messages as each salesperson sells 600 HP engine leases at or above the latest highest value. We can add an on-screen alert on the **Contract Details** screen letting them know they did a good job by exceeding the highest sales amount. Moreover, since we can enable a learning engine, we can have the system adjust its rules based on the latest contract data. Conversely, if the sales person enters a contract value less the $6,000.00 [or the lowest value of a 600 HP Engine Lease], we can warn them to check the pricing as it seems to low. If they are 20% over the median, we can reward them.

Once a pattern or a trend is detected via correlation and regression analysis, rules can be set to enable CobbleStone Software AI Engine to make intelligent recommendations based on data. This provides a standards-based method to recognize risk and re-evaluate the outlying risks. For advance intelligence, have your criteria update over time to enable the systems to learn (via Machine Learning). A good example of this is that your risk team may want to find out if your financial exposure on services your firm provides to detect if the financial exposure is too high for the price of the contract.

These risks monitoring onscreen alerts are set via the **Risk Analysis Warnings** settings that are configurable on the **Risk Analysis home screen** and discussed in this section.

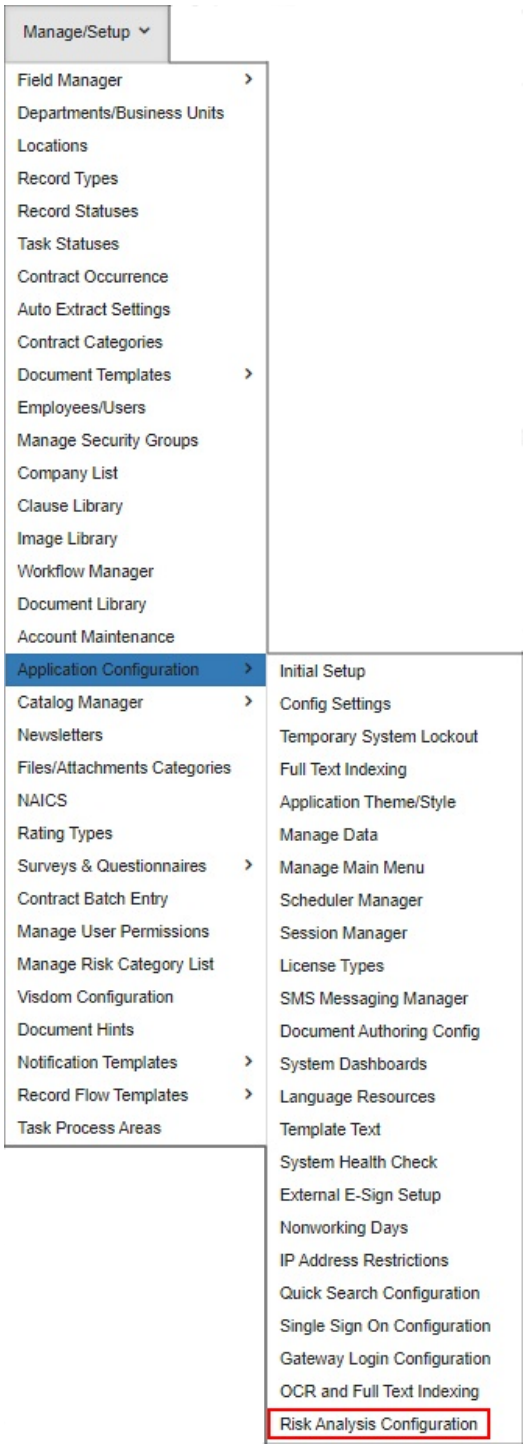
Risk Analysis Warnings and Risk On-Screen Alerts

Risk analysis warning and risk based onscreen alerts are useful to help contract admins, staff members, procurement managers and working professional display meaning full messages on a record based on risk analysis and machine learning data. To add a Warning for risk mitigation, complete the Risk Analysis Definition configuration steps.

1. log in as a System Admin user.

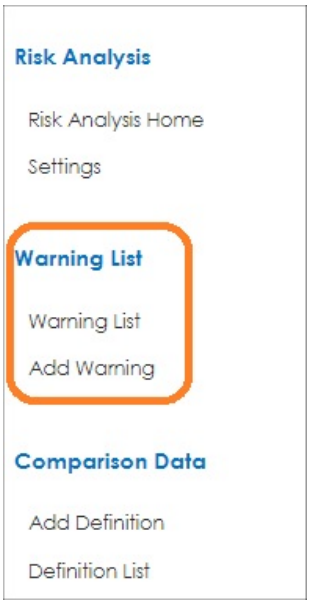
2. Navigate to the **Setup - Application Configuration - Risk Analysis Configuration** menu.

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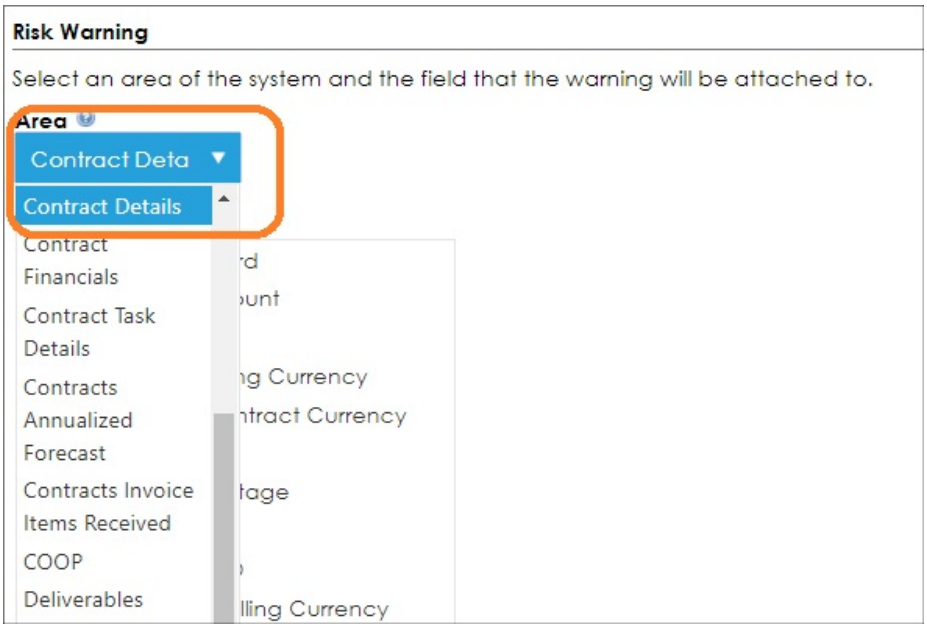


3. Click **Add Warning** to add and on-screen analytics alert message.

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4. Select the area from the pick-list.

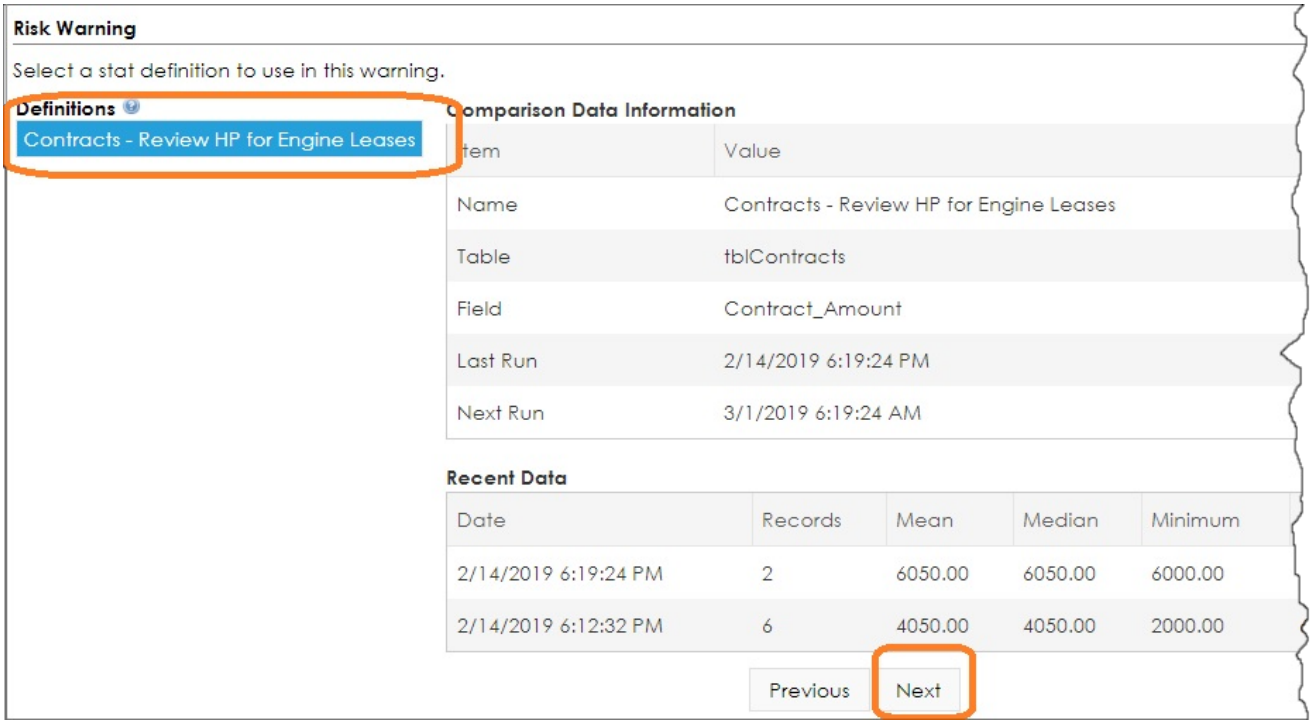


5. Select the field against which the warning/alert is to be displayed and click **Next (at the bottom of the screen)**.



6. Select a defined statistical **definition** to use for the warning/alert and click **Next**.

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7. Select the **conditions** for the warning/alert and click **Next**.

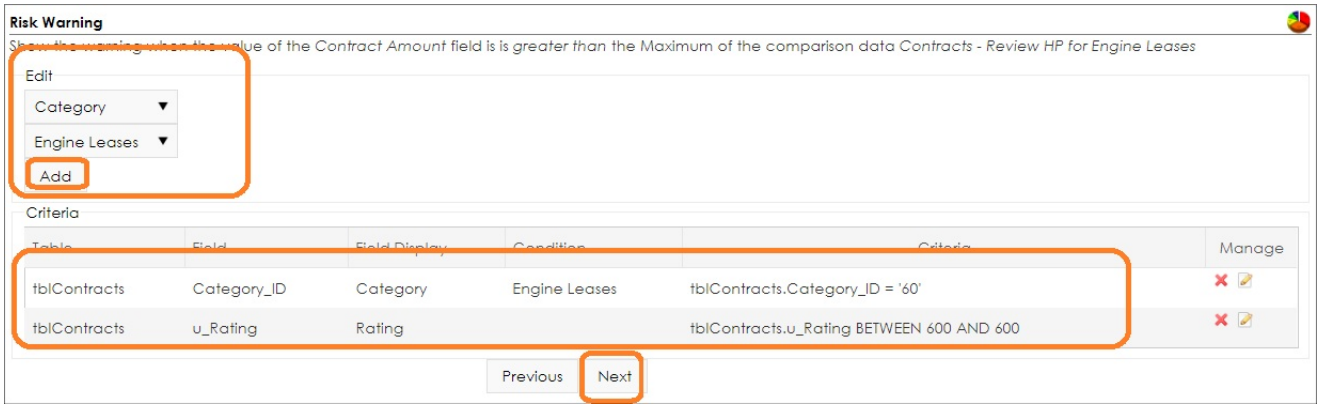
8. Select the comparison type for that condition.

For the example, we shall display the warning when the value of the Contract Amount field is greater than the **Maximum** of the comparison data Contracts - Review HP for Engine Leases



9. Set all **criteria** for the warning.

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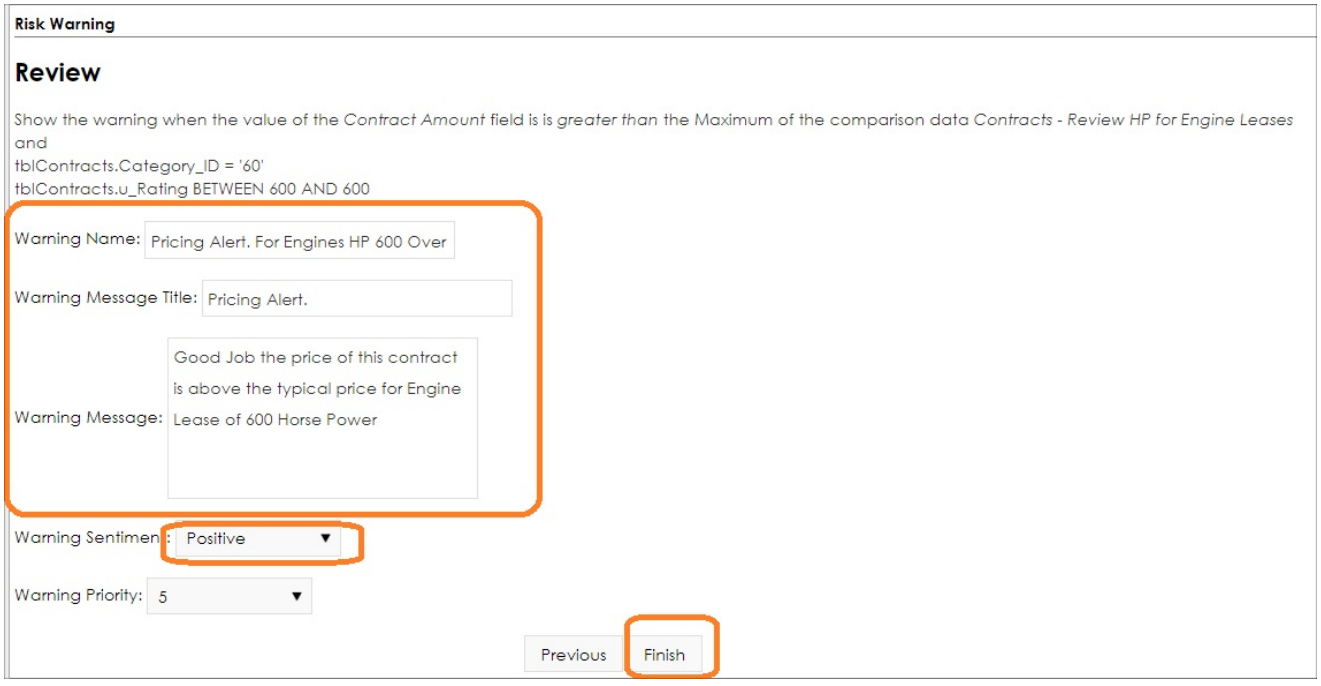


10. Review the warning criteria and provide the warning a **Name**, a **Message Title**, and a text **Message**.

11. Select if the **Sentiment** is positive or negative.

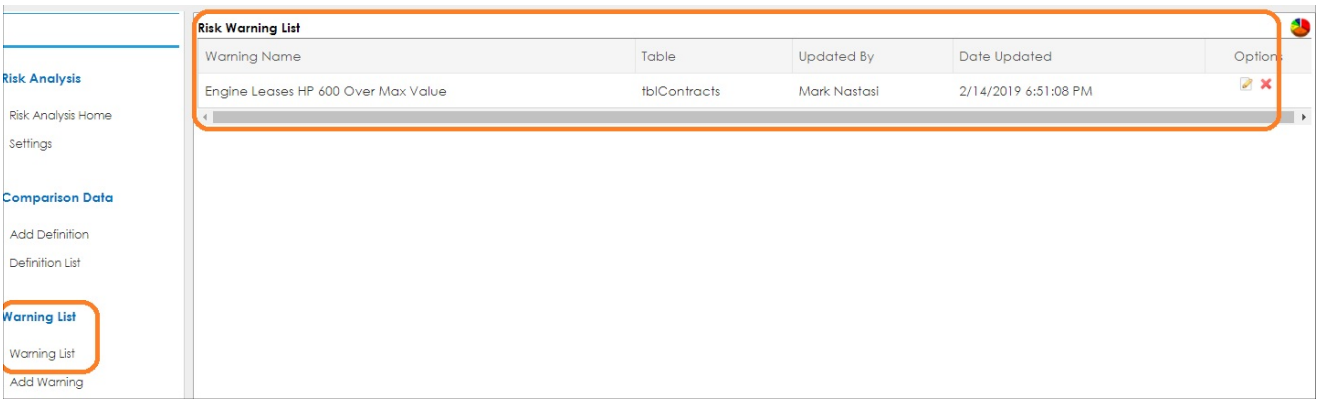
12. Select the **Priority** for the warning (how high or low on a possible list the warning is to display).

13. Click **Finish**.

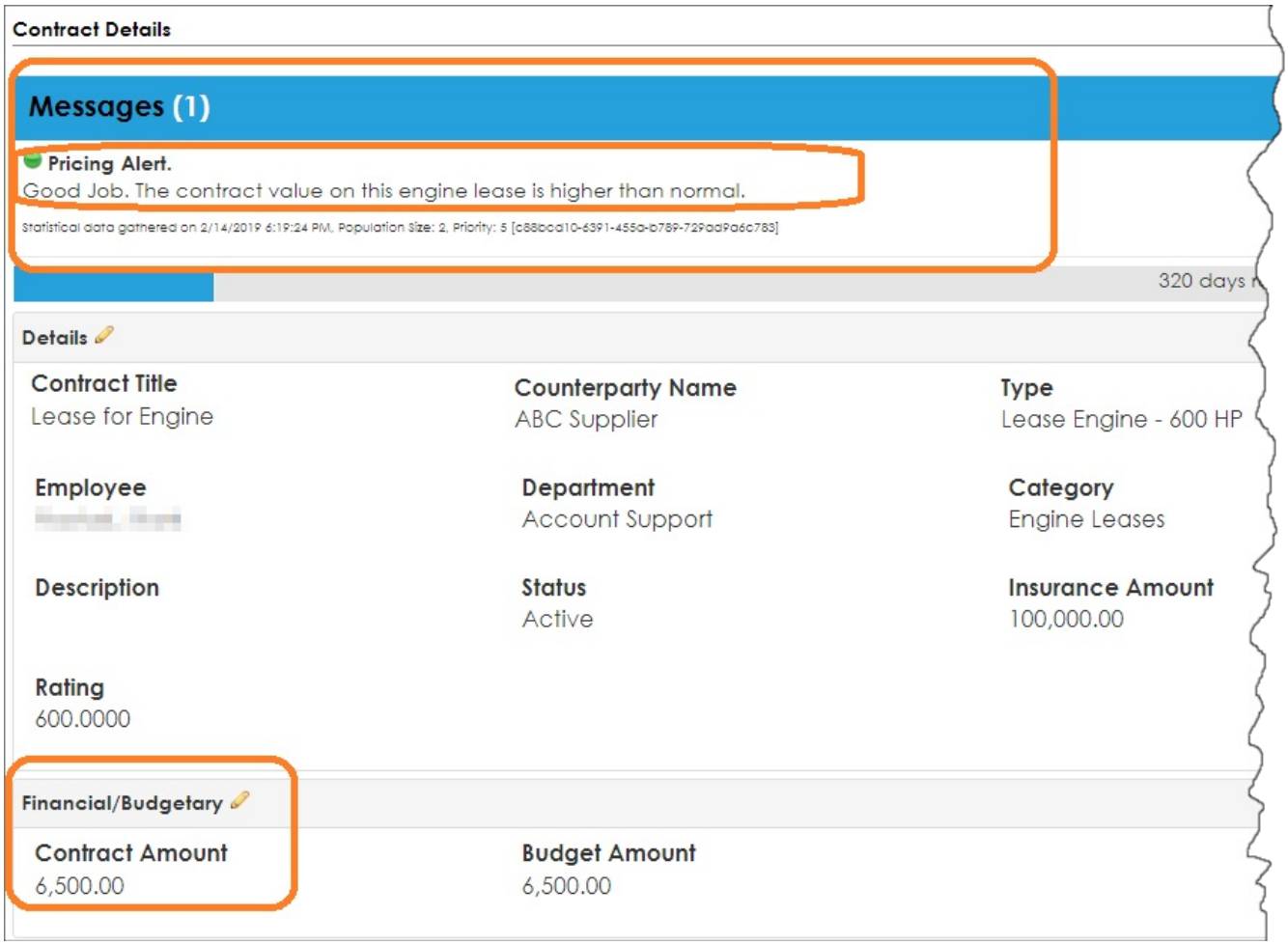


14. The **Risk Warning List** screen displays. All defined warnings are listed.

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Next, we can add or visit a Contract Record that has a higher contract value for a 600 HP Engine lease to confirm our message will be displayed if the contract value is higher then the $6,000.00 highest price the risk engine last detected. As seen below, we can confirm our message has been displayed.



Even though we gave the warning a priority of 5, since it is the only one, it displays at the top. If another warning with a higher priority was also applicable to the record, that warning would appear higher on the list.

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Keep in mind the next time this Risk Analysis Machine Learning job runs, the most recent contract data help adjust the Medium, Max, and Min values and subsequently the alerts will display based on the newly learned data.

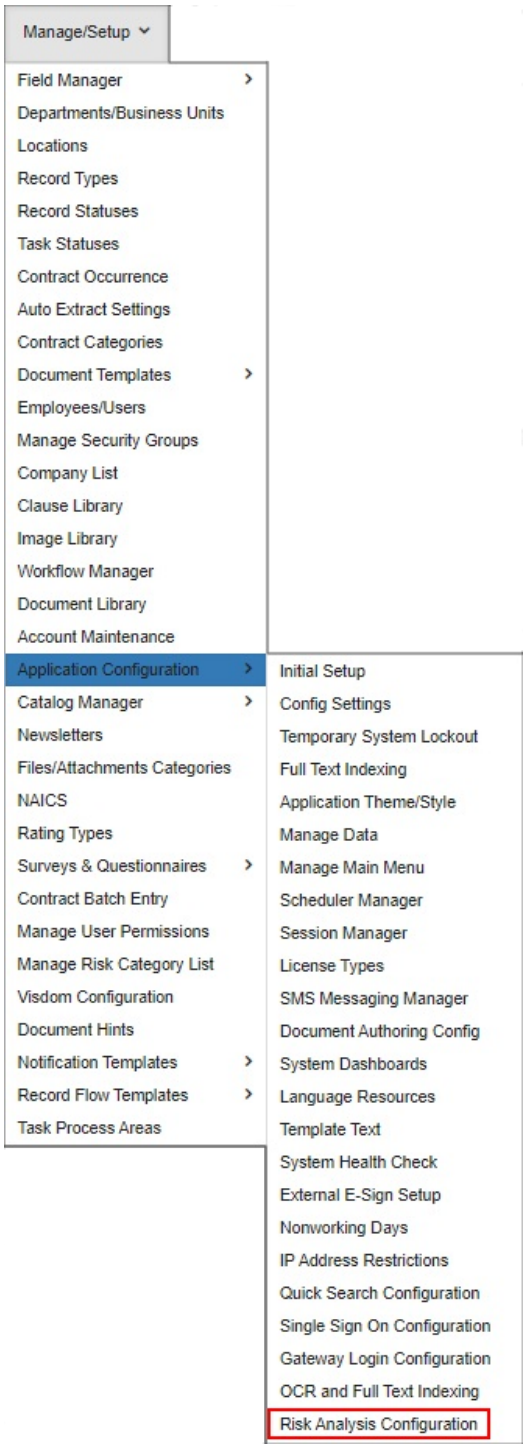
Testing the Data for a Statistical Usage (fitness) for Risk Analysis

Oftentimes, professionals know their data and the trends related to their data due to their expertise in the field, length of time working the data, recognizing patterns, or simply being taught. In mathematics, to confirm if the data meaningful there are mathematics tools built to test data and its relationship to each other. In other words, there is a math to confirm our thoughts and hunch on how data may be related. Mathematics can help us confirm if the data is related, is the relationship statistically significant, and how strong that relationship is. In other words, is the data is meaningful for analysis. This is a complex area of maths named statistics. What Cobblestone Software's VISDOM Risk Engine attempts to do is to make it simpler to use these tools. Typically, in predictive analysis, this is commonly referred to fitness of the data relationship to each other or its linear relationship. To confirm and prove that two data points have a strong relationship, VISDOM uses the CobbleStone Risk Analysis Engine.

Testing the Data

To perform a test of the data you want to analyze, log into the system as a System Admin user. Note, these tests are not stored in the system, they are just tools to confirm the relationship of data. The Risk Analysis with regression engine can be found under the **Setup - Application Configuration - Risk Analysis Configuration** menu

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There are several types of statistical and regression processes available to use. Some of the tools are better served for a purpose. Below is a summary of each method.

Comparison Data: This tool enables a user to build queries [searches] to generate comparison data. This can help determine how.
One Way ANOVA: The one-way analysis of variance (ANOVA) is used to determine whether there are any statistically significant differences between the means of two or more independent (unrelated) groups. For example, is the price of the contract related to contract type. For example, are Roofing Agreements costlier then Landscape Agreement.

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Pearson correlation: The Pearson correlation coefficient tests for the strength and direction of the linear relationship between two continuous variables. For example, is there a strong relationship between the distance a customer is from our headquarters and the Contract Value. Hence, the further away a customer is, does it contract value go up or down?

Spearman rank correlation: Spearman rank correlation tests the strength and direction of the monotonic relation between two ordinal, interval or ratio variables. For example, does the cost of concrete go up the further away the delivery point is.

Chi-square test of independence: Use the chi-square test of independence when you have two nominal variables, each with two or more possible values, and you want to see whether the proportions of one variable are different for different values of the other variable. Use it when the sample size is large. For example, are certain contract types more likely to have a legal hold?

Chi-square test of goodness-of-fit: Use the chi-square test of goodness-of-fit when you have one nominal variable with two or more values and you want to see whether the number of observations in each category fits a theoretical expectation, and the sample size is large. For example, is there any significance to the number of contracts by location, are there a patter related to contract location?

Testing Data for a Regression and Risk Analysis

In statistics, it may be useful to mathematically confirm that there is a correlation of the data we want to analysis prior to configure rules that may not support our theory. Each method of detecting a pattern or relationship is slightly different and may vary for each specific business case. Below we will use Pearson correlation method to detect if the lease value (contract amount) of our contracts is higher based on the type of engine we lease. For example, we lease three engines types: a 200 HP (horse power) engine, a 400 HP engine and a 600 HP engine. We want to check that the contract data that we tracked when we lease an engine is price higher for a larger HP engine.

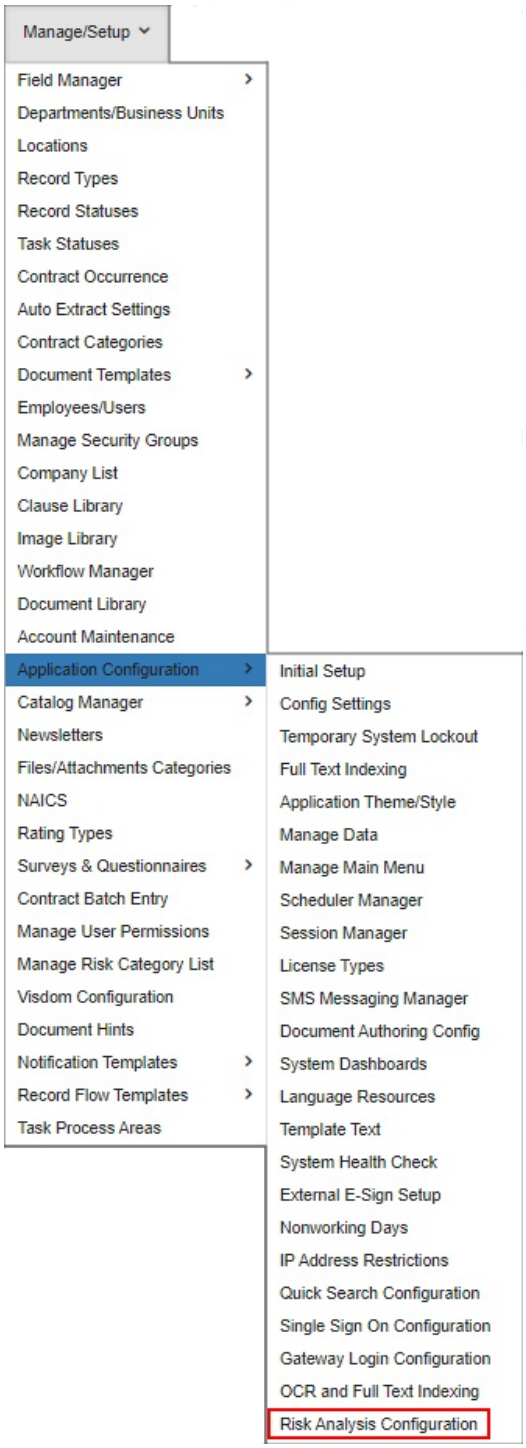
To perform a test of the data you want to analyze

1. log into the system as a System Admin user.

Note: These tests are not stored in the system, they are just tools to confirm the relationship of data.

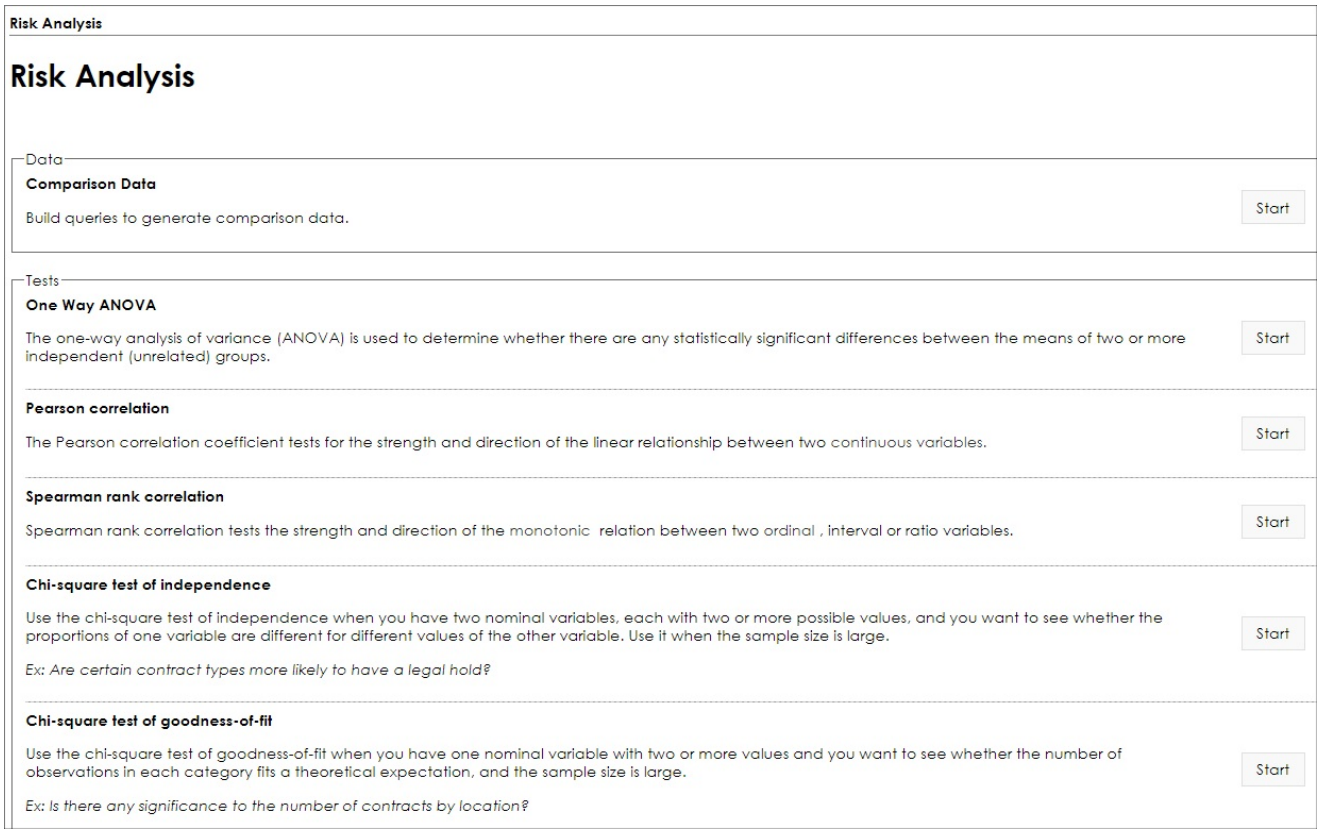
2. The Risk Analysis with regression engine can be found by navigating to **Manage/Setup - Application Configuration - Risk Analysis Configuration**.

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3. The **Risk Analysis testing tool** screen displays.

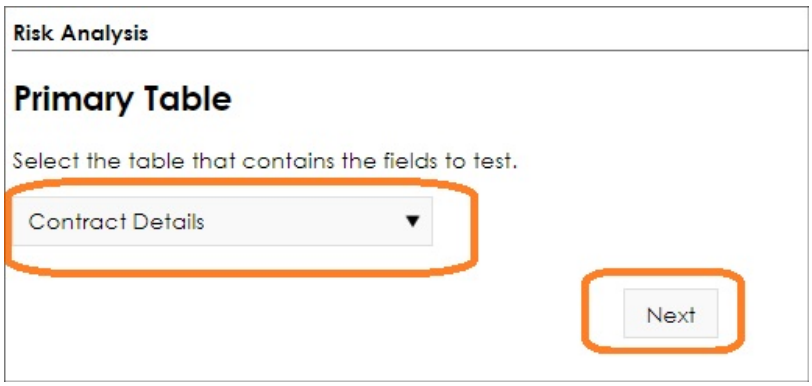
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4. Click **Start** for the desired method. For the example, we shall use the **One-Way ANOVA** correlation risk tool.

5. Select the area of the system on which to perform the analysis. For our example, we are analyzing contract data, so we selected Contract Details.

6. Click **Next.**

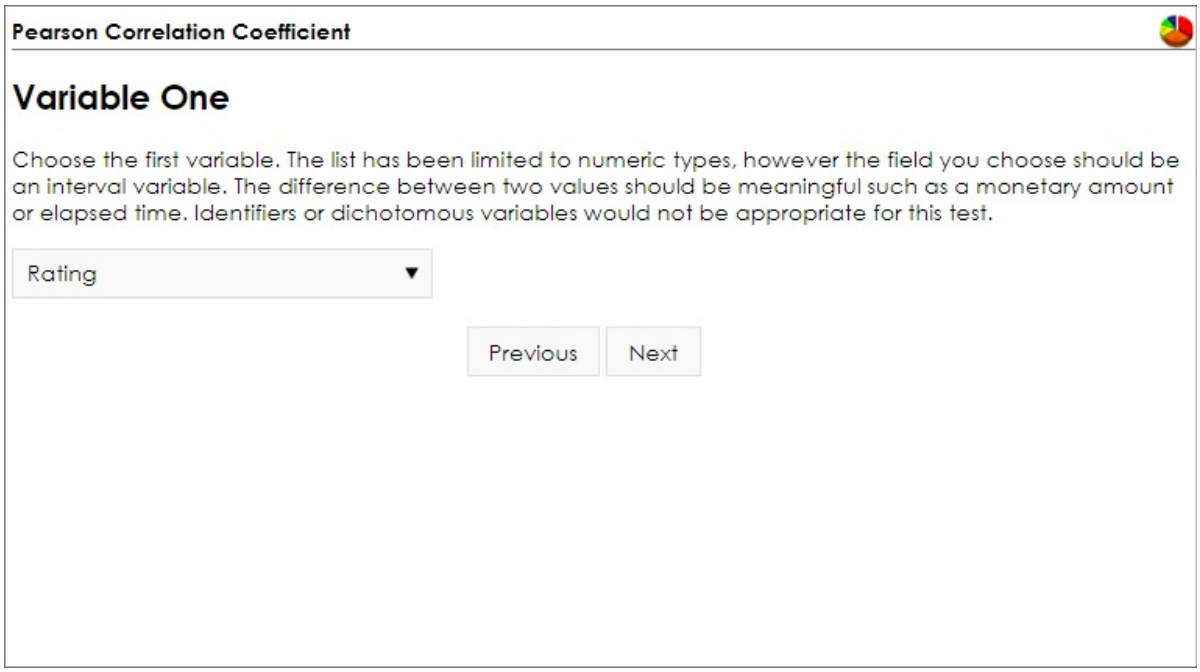


7. Select the field for the **first variable** to use in the analysis. In this example, we are selecting the Engine Rating field.

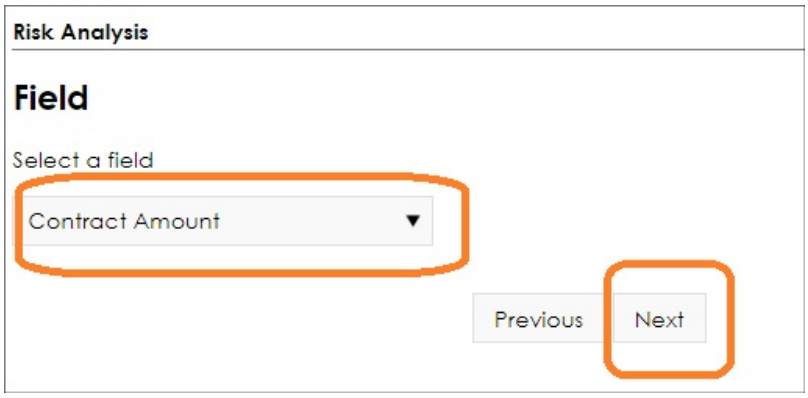
Note: Each system's field names may be labeled differently; in this example, our field is named Rating.

8. Click **Next**.

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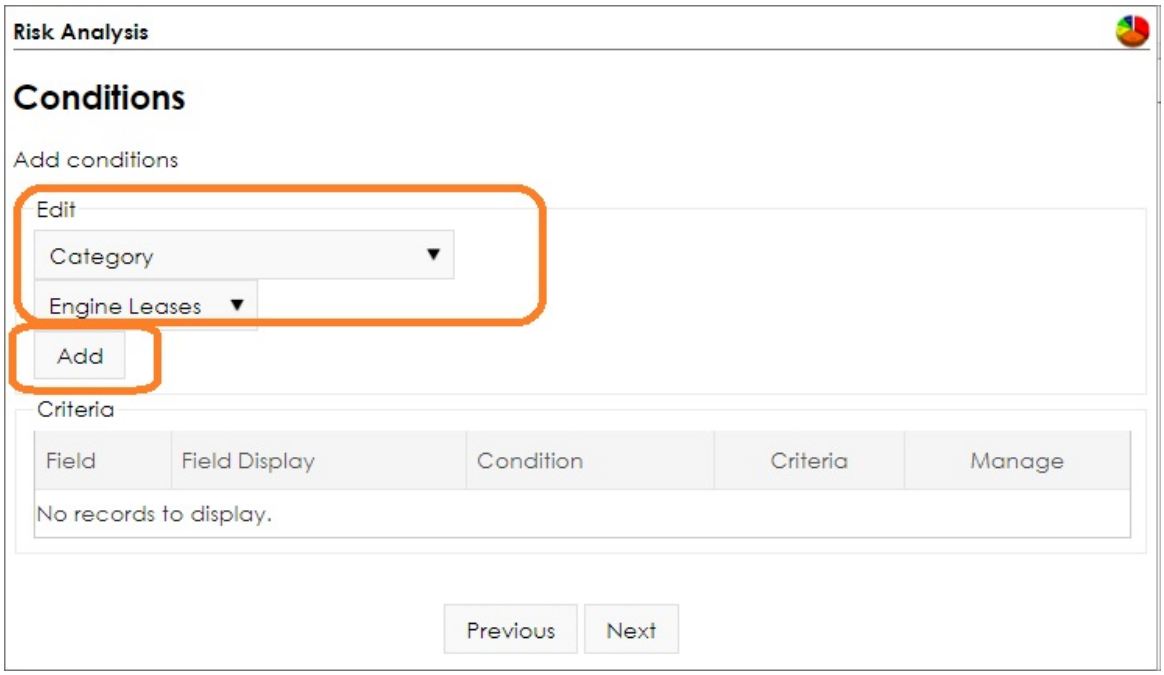


9. Select the **second variable**. For this example, we will select Contract Amount for our analysis.



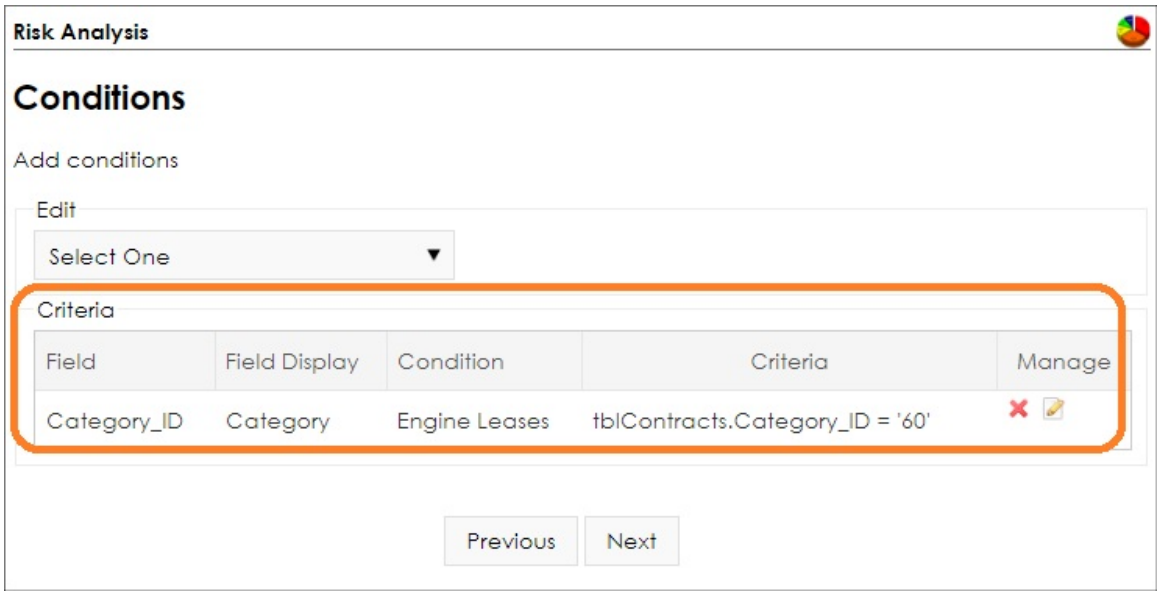
10. Add Filter Conditions (optional but recommended) to meet the specific purpose of your analysis. For the example, we only want to analyze records that are Engine Leases (based on the Contract Category field). Other filters may be based on contract type, department, location, employee, dates, and any other primary record fields made available to the engine.

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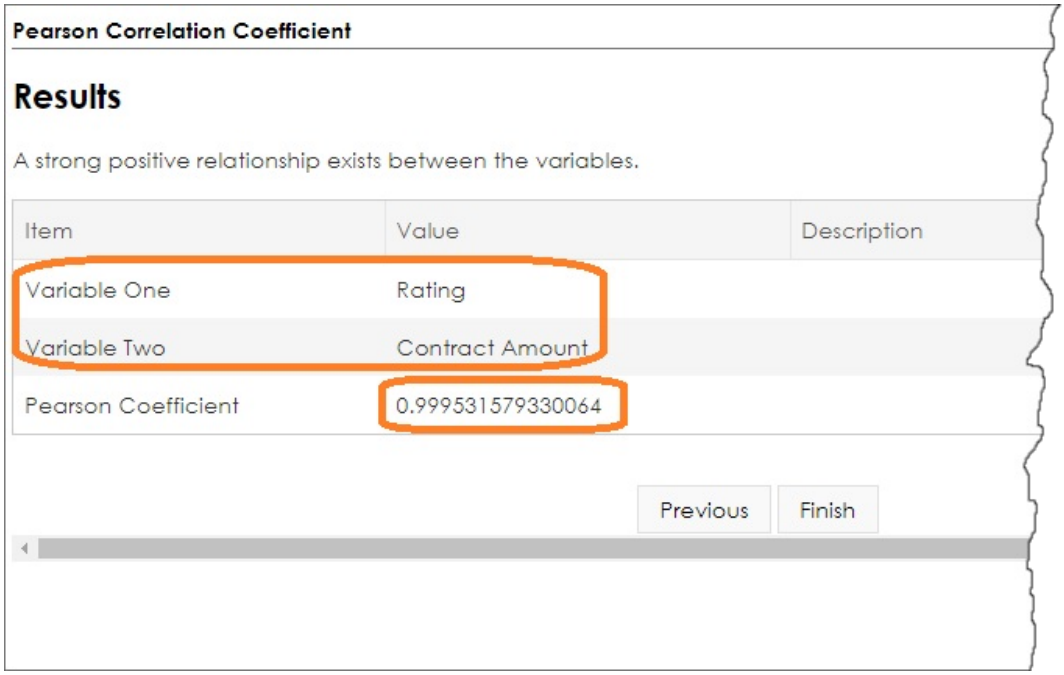
11. Click **Add**. Once the criterion is saved, it displays in the **Criteria** area. From here, each may be edited by clicking the **pencil icon**. For this example, it is the only condition we want.

12. click **Next**.



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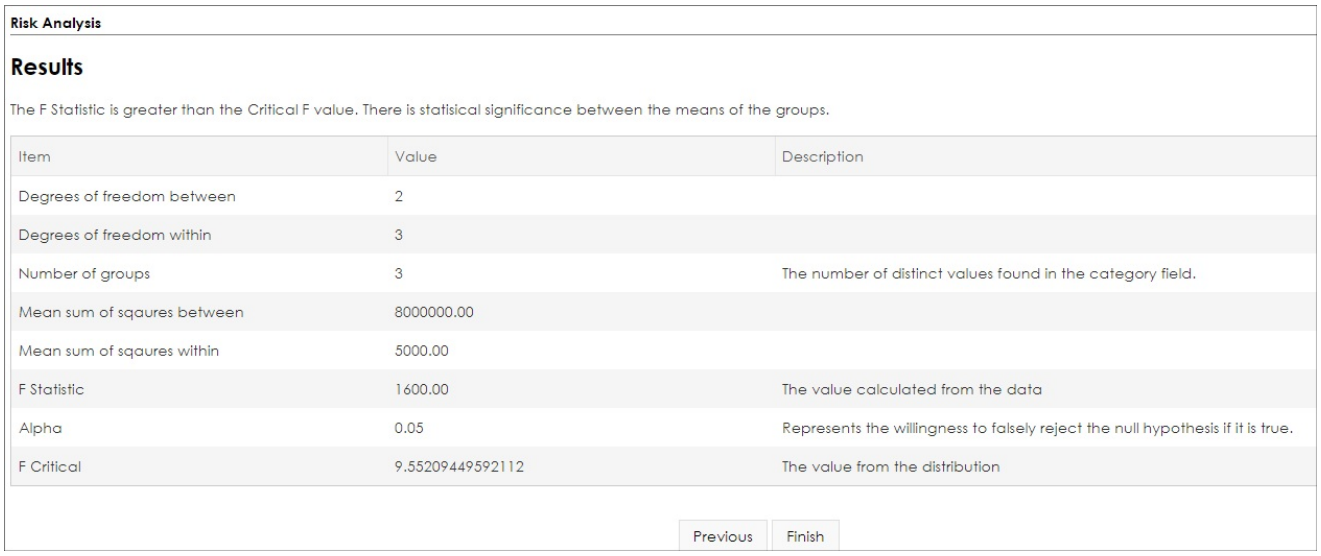
The results of our test are shown with the two field variables we analyzed, Contract Value and Engine Rating. Since we also set filter conditions for only where the Contract Category field is for Engine Leases, we get meaningful analysis specific to Engine Leases (and eliminate the unrelated data from contracts that are not Engine Lease contracts that may skew our regression test results). Our results in this analysis using Pearson Coefficient method proves that our data has a Pearson Coefficient (or correlation score) of 0.99953. This means there a is a **very high** relationship between the two fields we analyzed, and not only is the data correlated bus has a highly positive number that indicates there is a positive relationship between the two fields. A 0.9999 coefficient means that as Variable One increase, Variable Two increases. Our results confirm this is a good analysis and potential rule to use for risk detection and for which we may want to add onscreen alerts.



Note: A Risk Analyst tests as is not saved in the system and should be used only as a tool to confirm a theory and relationship of data. To use this in the actual risk engine job, we add this as a Risk Definition and assign a Warning/Alert (as discussed above).

Below is another example of a risk analysis test, one using Chi Square.

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Risk Analysis

Results

The F Statistic is greater than the Critical F value. There is statisical significance between the means of the groups.

Item	Value	Description
Degrees of freedom between	2	
Degrees of freedom within	3	
Number of groups	3	The number of distinct values found in the category field.
Mean sum of sqaures between	8000000.00	
Mean sum of sqaures within	5000.00	
F Statistic	1600.00	The value calculated from the data
Alpha	0.05	Represents the willingness to falsely reject the null hypothesis if it is true.
F Critical	9.55209449592112	The value from the distribution

Previous Finish

Note: Regression and statistics are a complex area of mathematics and should be confirmed by a qualified expert legal advice from an attorney.

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Extract Text with VISDOM: Text/Phrase Recognition for One-Off Contracts

Extract Text with VISDOM: Text/Phrase Recognition for One-Off Contracts

Extract Text with VISDOM™

Overview

Oftentimes, when legal, contract risk, and procurement professionals review contracts and related documents that may bind organizations, they attempt to reduce risk for their organization. They may utilize techniques that have been taught to them, items they understood from the organizations policies, laws, applicable regulations and trends in the market, to name a few. Some examples of these risk reduction items include: recognizing terms indicating an area of caution in the contract language, scanning for identifiable information (e.g., numbers, money, dates, credit card numbers, address, bank account information, etc.), reading for phrases such as all liability, governing law, and deep, comprehensive meaning of the language found in the document.

As an organization grows, the volume of the risk reduction review duty increases and becomes tasking; little details may be missed if the professional is overworked, distracted, or rushed. It could be prudent for the individual and organization to teach the software program they use how to recognize similar items, such as text, phrases, and identifiable data (as listed above). This type of tool may be helpful with assisting the professional as an additional tool combined with the professional's personal review of the document. CobbleStone has evolved their text recognition engine with the introduction of VISDOM Artificial Intelligence. As software tools advance, it is still important to have legal documents reviewed by a legal professional such as an attorney. The tools discussed below are not intended to be used as legal advice as only an attorney should provide legal advice.

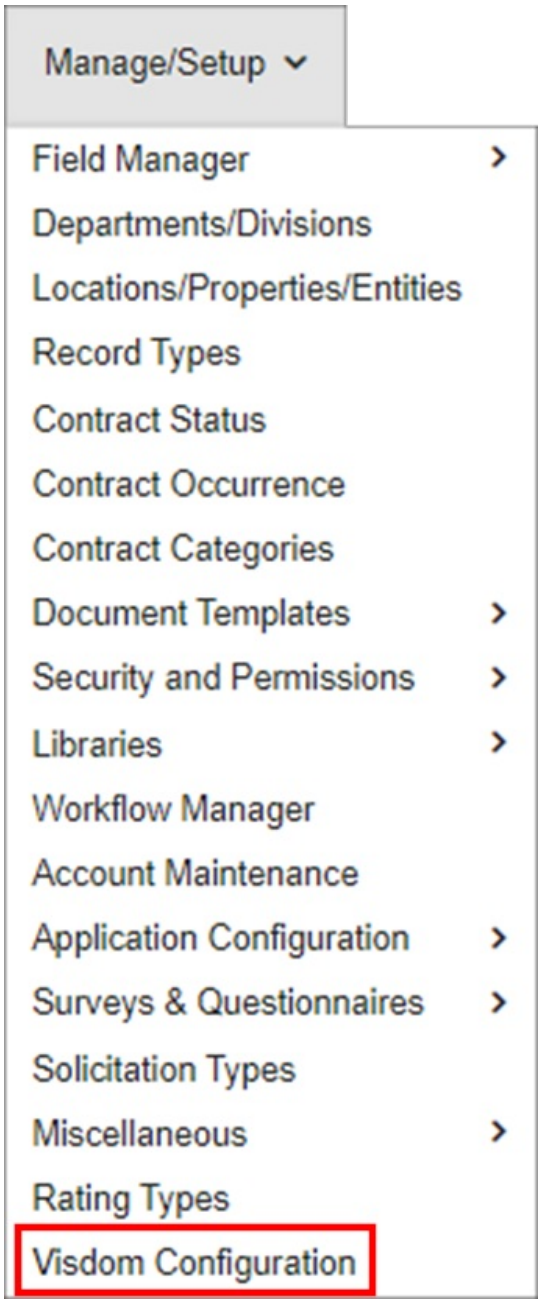
Example of Text Recognition with VISDOM AI

As we cover the topic of text recognition with artificial intelligence, it is important to understand that artificial intelligence is not perfect. For it to work on text recognition, one must consider the inherent challenges with reading and reviewing documents. First, the documents may not be in useful formats for the engine to review and recognize text. Second, the documents' text may be too small, bunched together, skewed, or degraded if the they were scanned documents or contain image or text over lay (even humans can have difficulty understanding text if the text is impeded), foreign text, or even pages missed. Once a document is introduced to the CobbleStone Software's contract entry screen the engine, if enabled in the Enterprise edition, attempts to review the document to see if it is text-based. If the document is not, the engine attempts to recognize text via optical character recognition (OCR) (which has inherent limitations). Once complete, VISDOM attempts to run the document text through the rules it was taught to help extract text, phrases, and identifiable information. If configured, it will try to place the extracted data in data fields to help with contract data entry. This may be helpful in assisting the professional with entry and review of contract documents. Think of it like a machine review of the document text based on rules taught to it.

Configuring Text Extract Rules for New Contracts

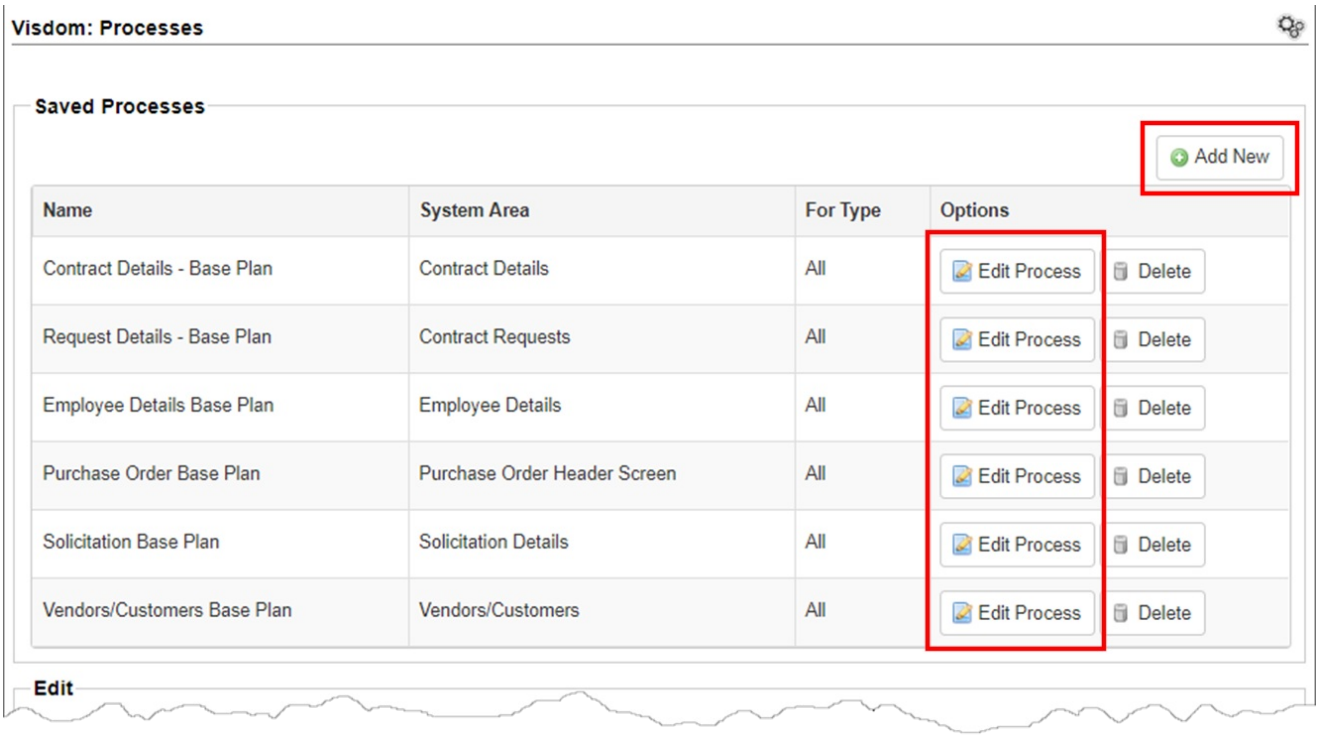
1. To Configure the Text Extracting Rules for a newly added contract records navigate to **Manage/Setup - VISDOM Configuration**.

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2. The **VISDOM: Processes** page displays. To work with an existing VISDOM Process, click **Edit Process** for the desired line item. To add a new process, click **Add New**.

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Adding a New VISDOM Process

There may instances in which specific rules are needed for text extraction for a type or the existing rules simply do not meet the needs of the organization. In those cases, a new process may be desired.

1. Click **Add New**.

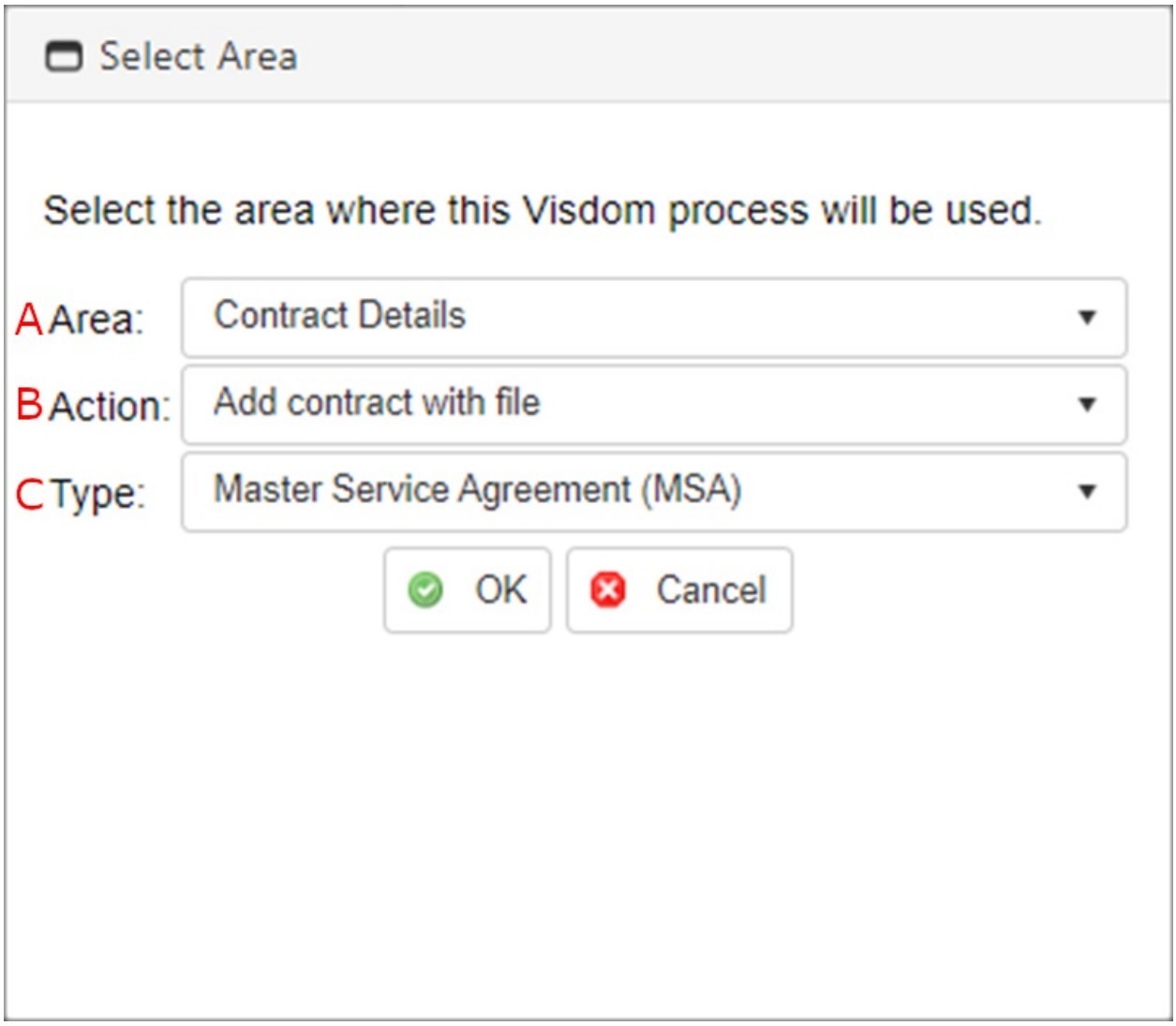
2. a Pop-up window displays. Select the desired items for each of the three areas:

A. Area - For which area or module does the rule set apply? Select the area from a list of the major CobbleStone modules.

B. Action - Select Add (record) with file.

C. Type - Select the desired specific record type or All Types.

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3. Click OK.

4. The pop-up closes and the list of VISDOM Processes displays with the new process included in the list.

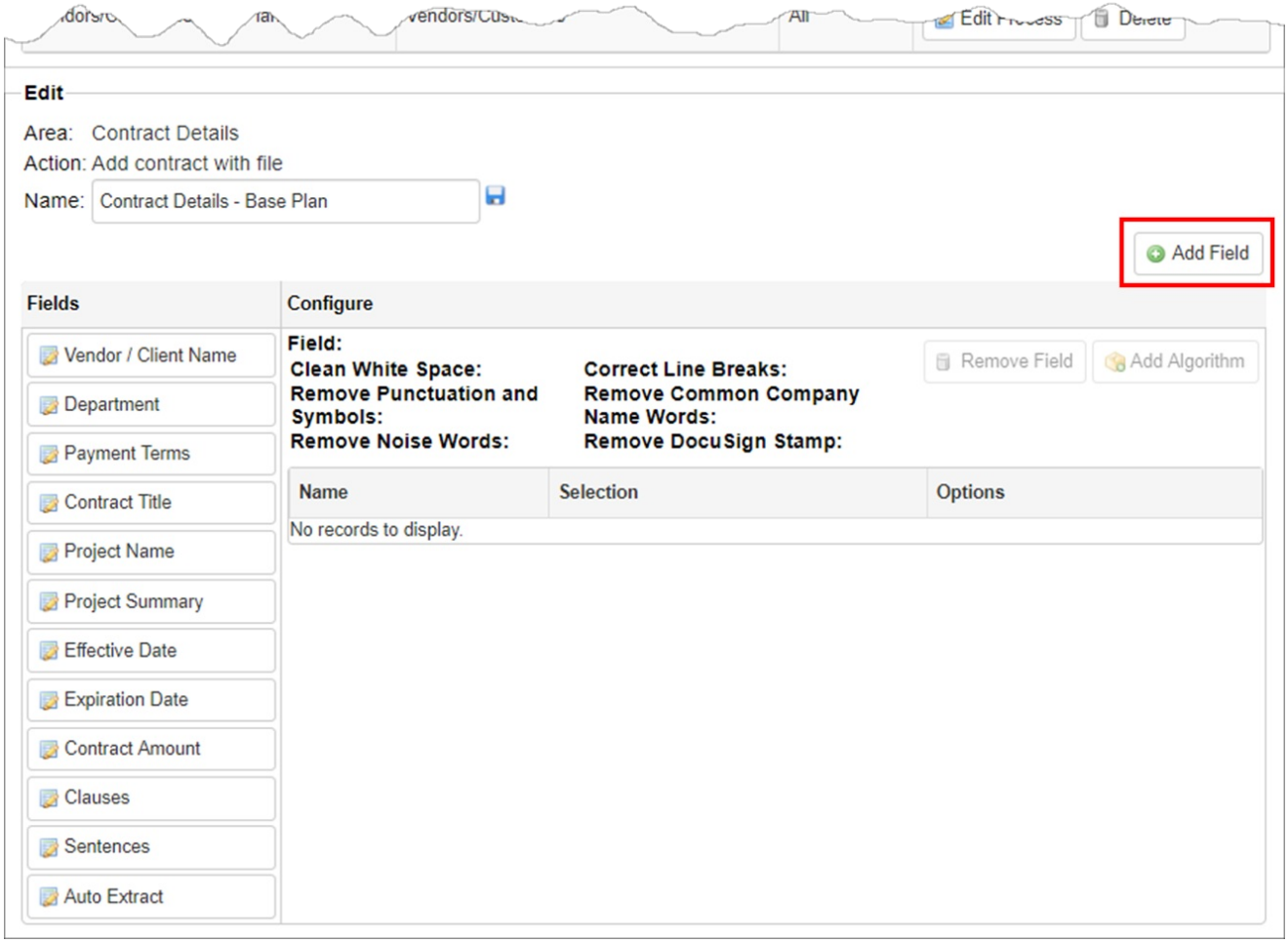
Adding Fields to a Process

1. Click **Edit Process** for the desired line-item.

2. Process data displays at the bottom of the page. Scroll to the **Edit** area.

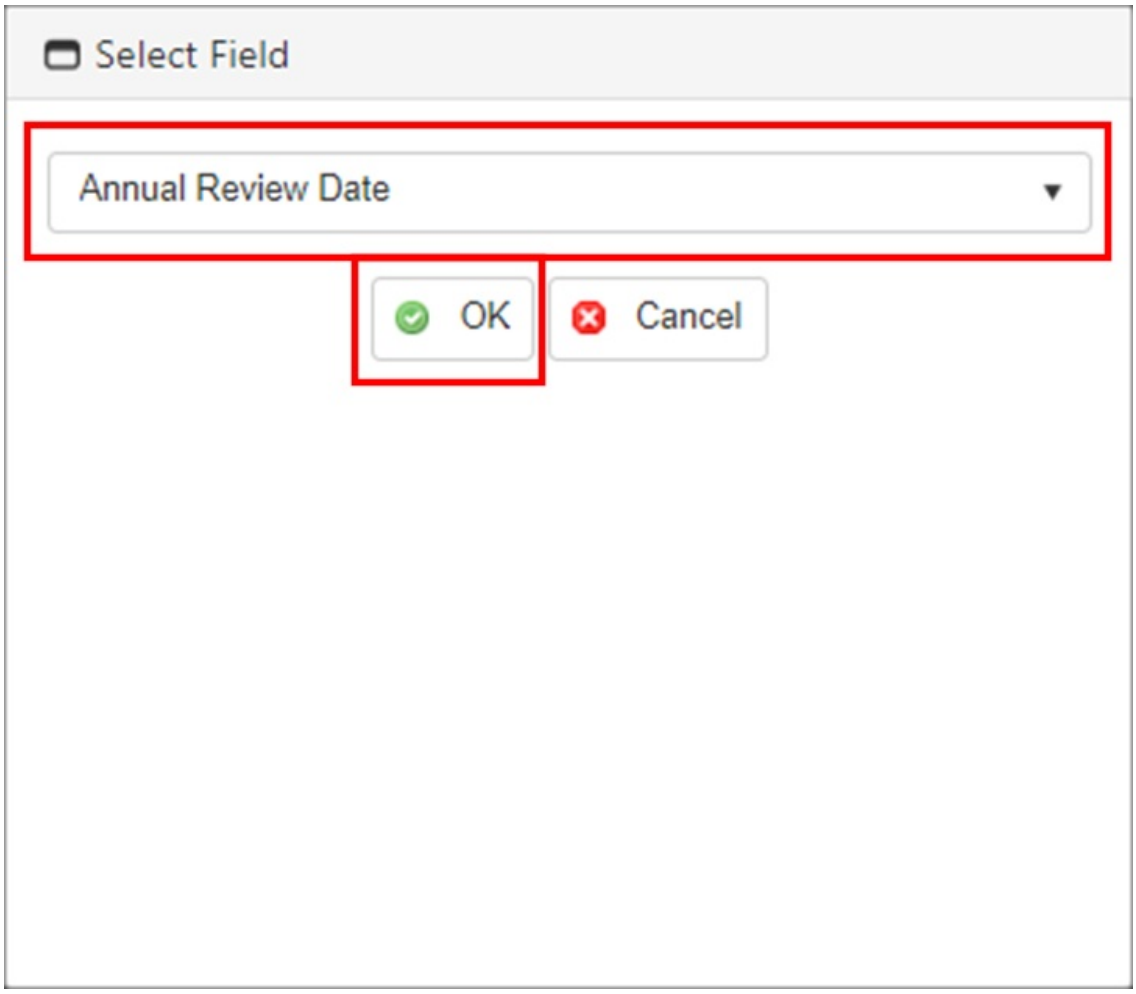
3. Click **Add Field**.

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4. A pop-up window displays. Select the desired field from the table for the area selected for the process.

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5. Click **OK**.

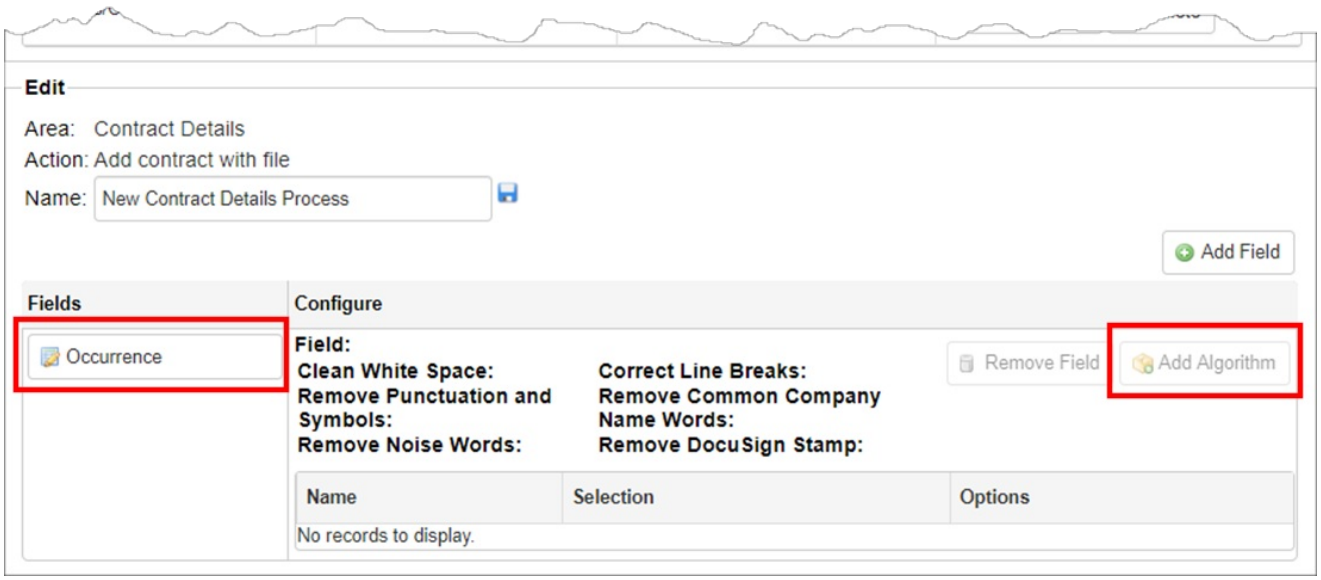
6. The pop-up window closes and the field list displays. An algorithm must be defined for each field.

Adding and Defining an Algorithm

Each field must have at least one algorithm defined so VISDOM can take the definition and apply it as text extraction rules.

1. Click the field desired.

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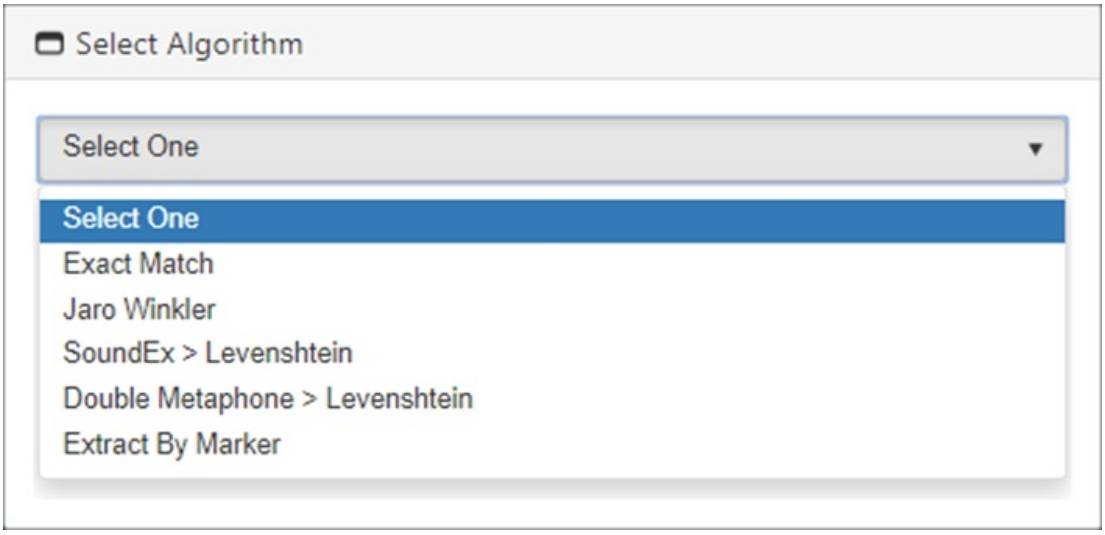


2. Click **Add Algorithm**.

3. A pop-up window displays. Select the algorithm desired.

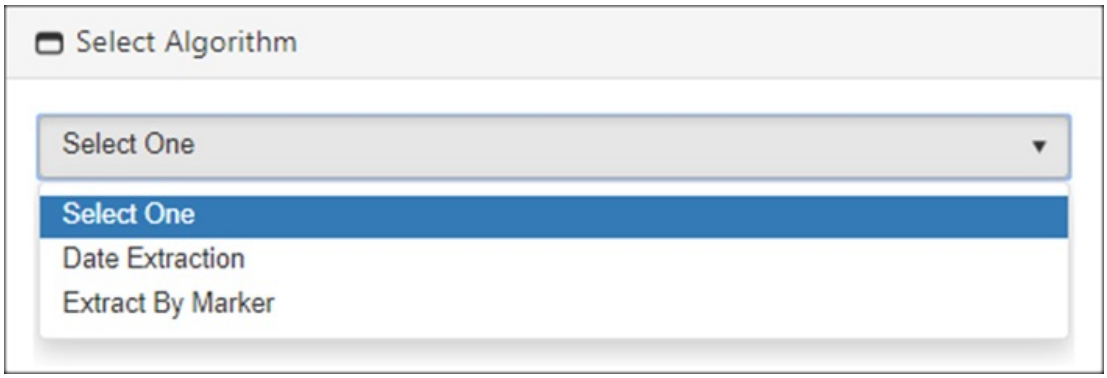
Different field types have different options available.

Drop-down/Pick-list

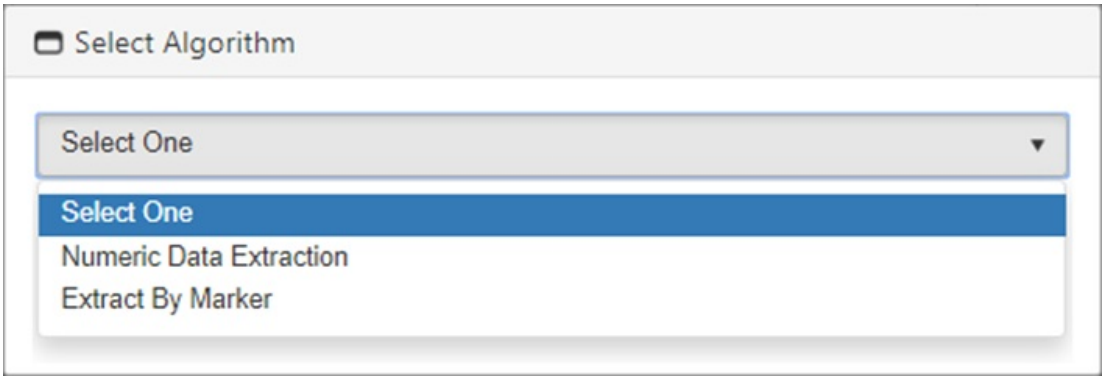


Date

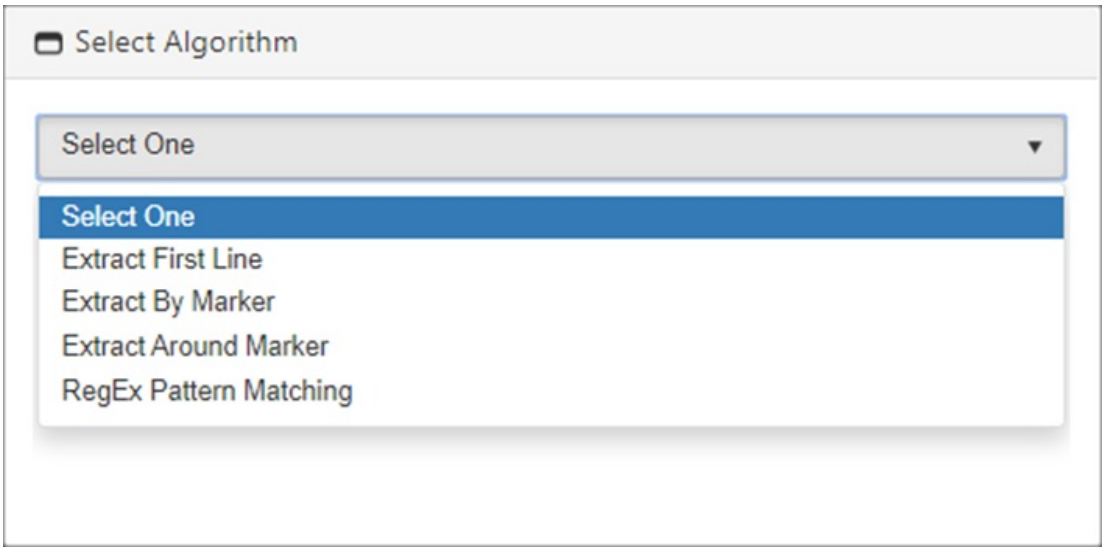
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Number



Text



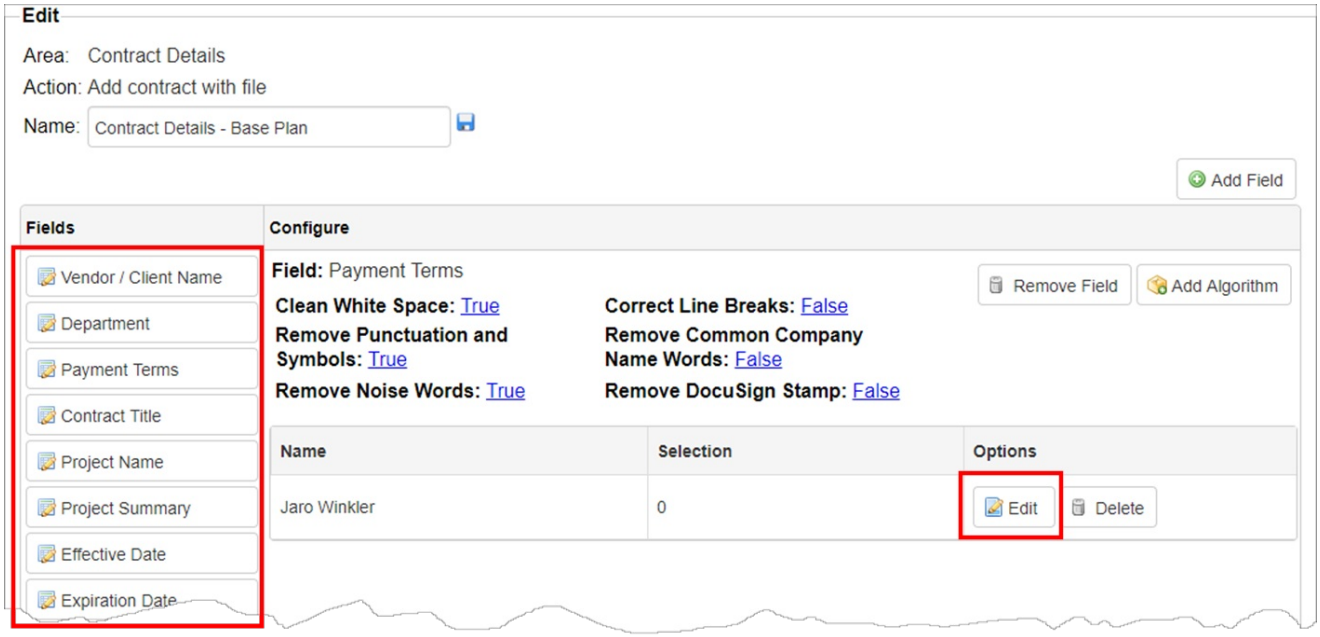
4.Click an algorithm to review the meaning of each.

5. Open the list again to select a different algorithm if necessary.

6. Click **OK** once the desired algorithm has been selected.

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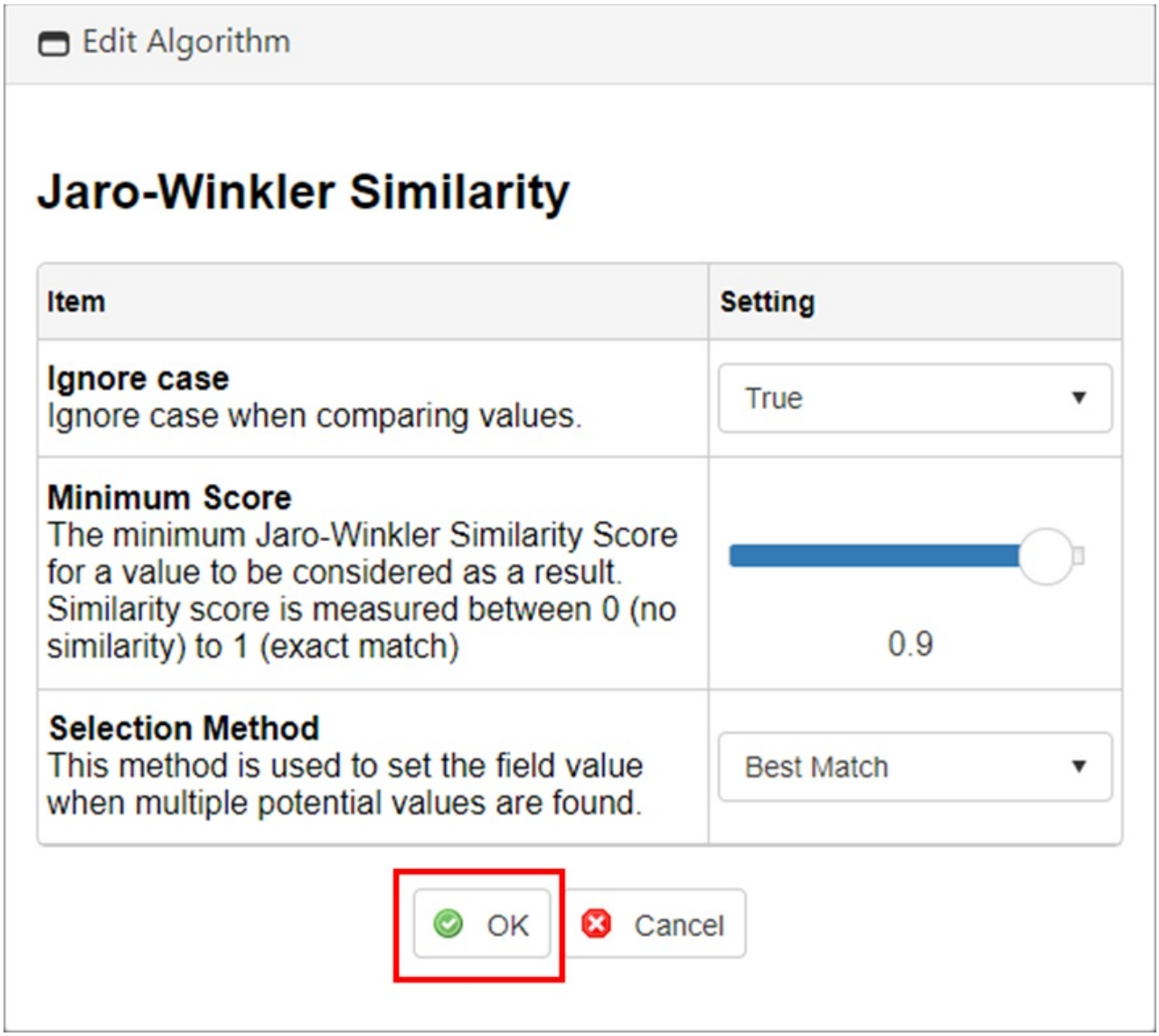
7. The pop-up window closes and the field list again displays. Select the field desired.



8. Click **Edit** for the algorithm to define for that field.

9. A pop-up window displays. Alter each setting as needed. Your business rules may vary.

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Note: Different algorithms have different settings to be applied. The above example is for Jaro-Winkler Similarity.

10. Click **OK**.

11. Repeat the process for each field needed for the process.

Field Options

Each field selected has a set of six (6) options:

A. Clean White Space - Set to True to remove white space within a phrase when checking for a match.

B. Remove Punctuation and Symbols - Set to True to ignore non-standard characters when checking for a match.

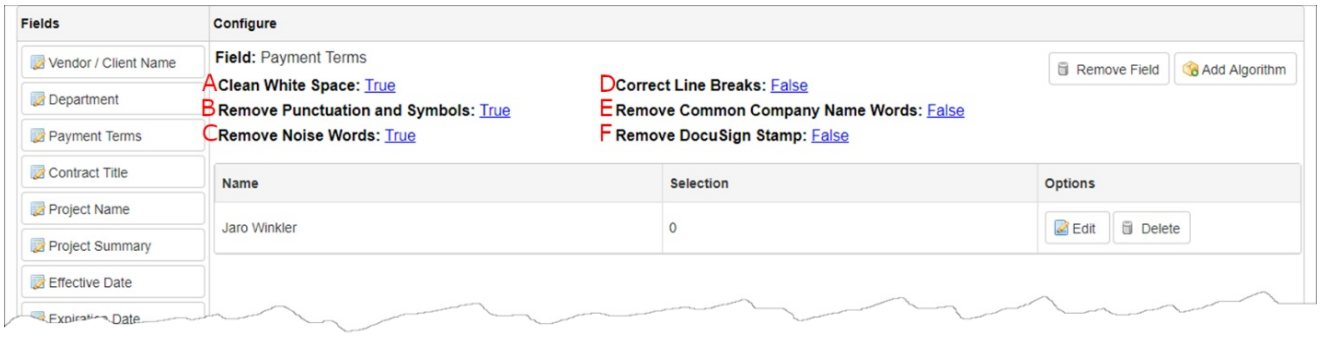
C. Remove Noise Words - Set to True to ignore words defined in the **Noise Words Dictionary** when checking for a match.

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D. Correct Line Breaks - Set to True to review the text without line breaks/carriage returns when checking for a match.

E. Remove Common Company Name Words - Set to True to ignore words defined in the Common Company Name Words dictionary when checking for a match.

F. Remove DocuSign Stamp - Set to True to ignore DocuSign stamps when checking for a match.



Your business rules may vary for each of the settings.

Note: it may be impossible to configure for every scenario as each contract document is different.

Testing our configuration

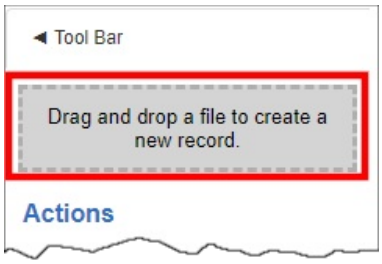
We can check our configuration by adding a new record with VISDOM.

1a. From the top navigation menu, select module and click **Add (record) with VISDOM AI**. While the example below shows the **Contracts** menu, other record types can use VISDOM AI too.

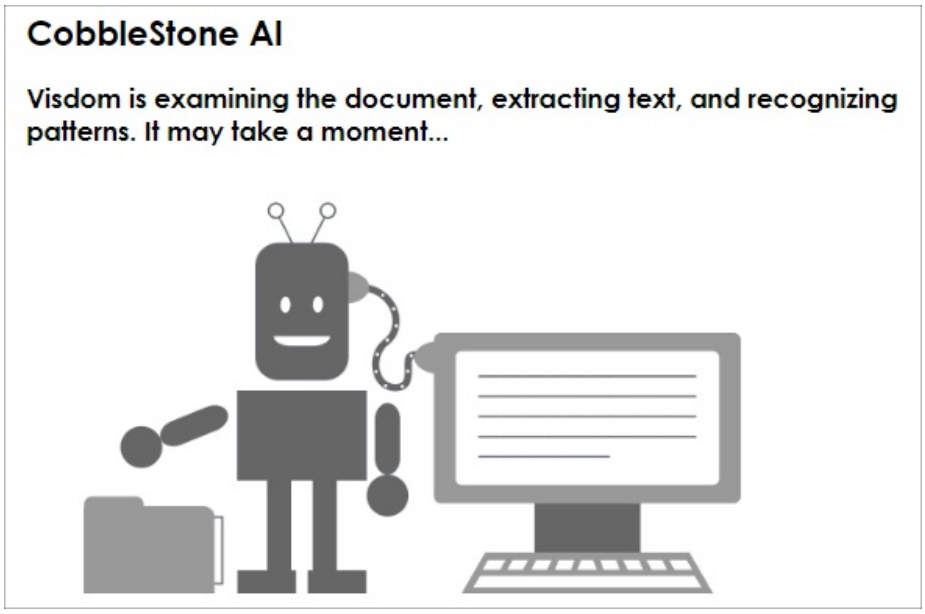


1b. Alternatively, drag and drop the desired file onto the grey **Drag and drop a file to create a new record** box then select the module desired. This box displays at the top of the side menu.

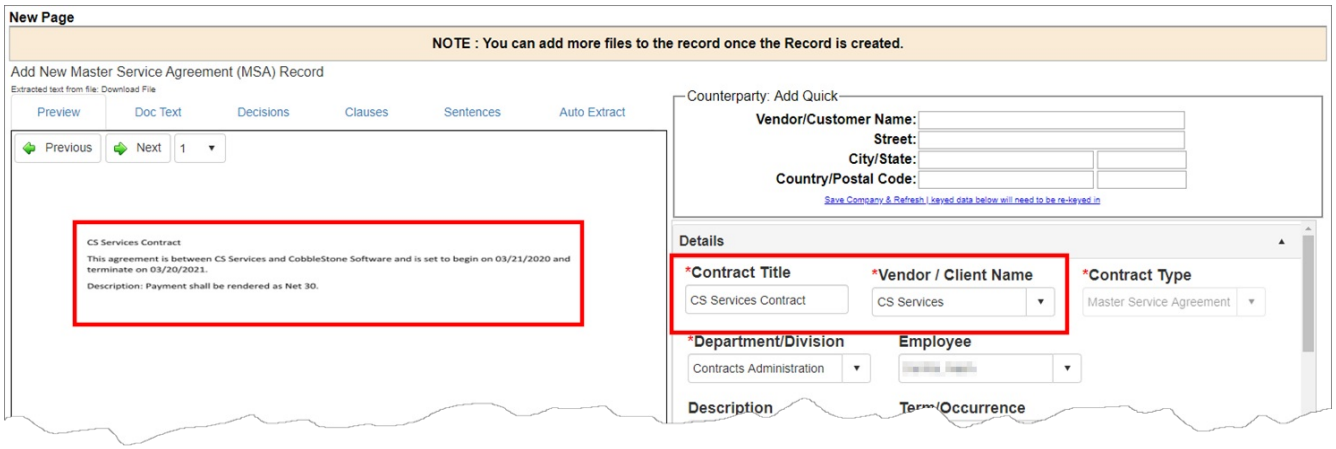
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2. VISDOM tries to recognize the text and extract it based on the rules configured. In addition, VISDOM tries to extract the Title of the contract, check for intelligent data it learned from the systems counterparty names (vendor and customers), locations (city, states), employee names, e-mail addresses and identify this information as well (it learns from the data in the system).



3. After VISDOM's search and extraction are complete, we see the file and data entry fields.



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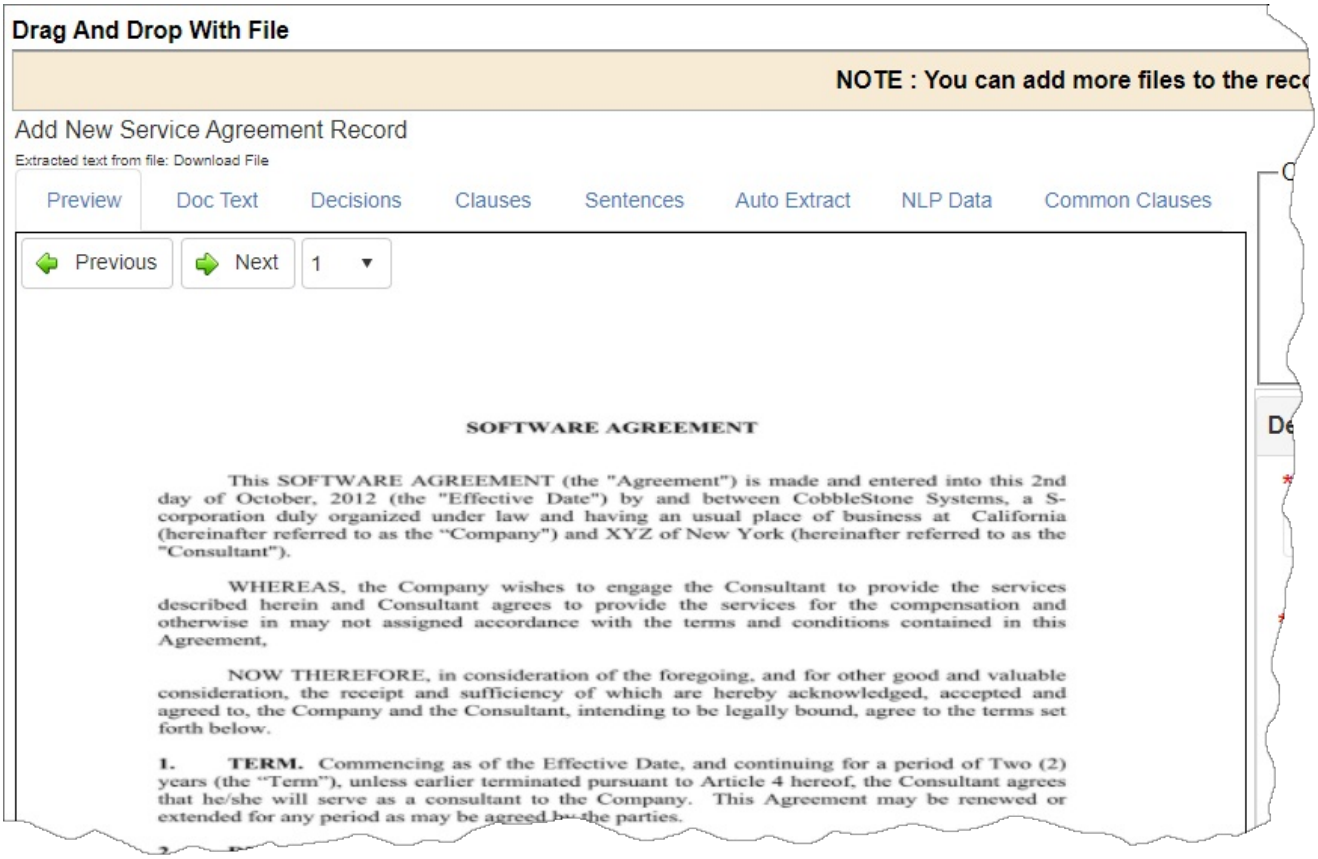
In the example above, the **Contract Title** and **Vendor/Client Name** were both successfully extracted.

Note: It is recommended to review and edit the extracted text to ensure the text extracted is accurate and reflective of the data you want tracked.

Diving deeper into the text extraction engine

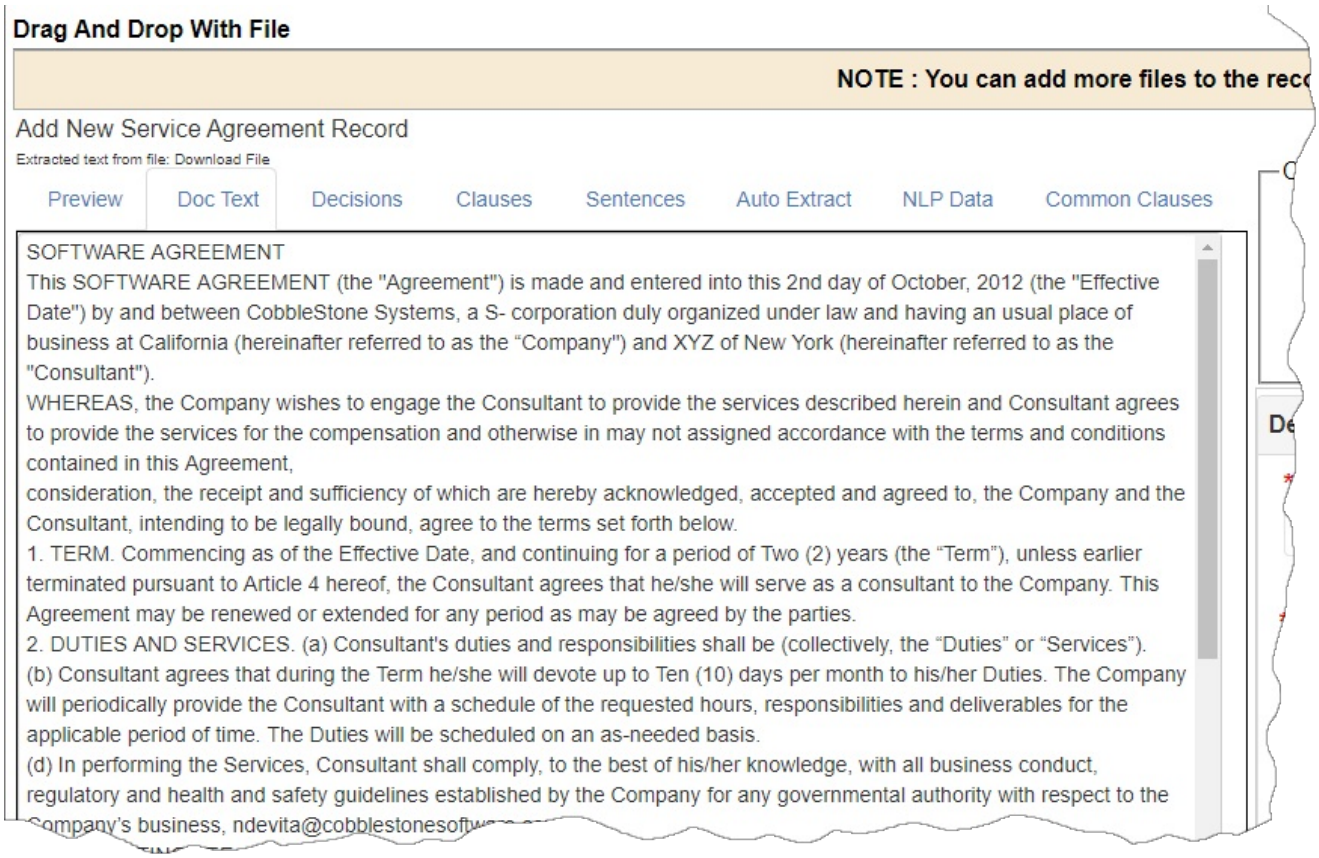
Seen below, we notice other **tabs** above the image of the document that are helpful.

Preview: The Preview tab contains an image of the document and each page.



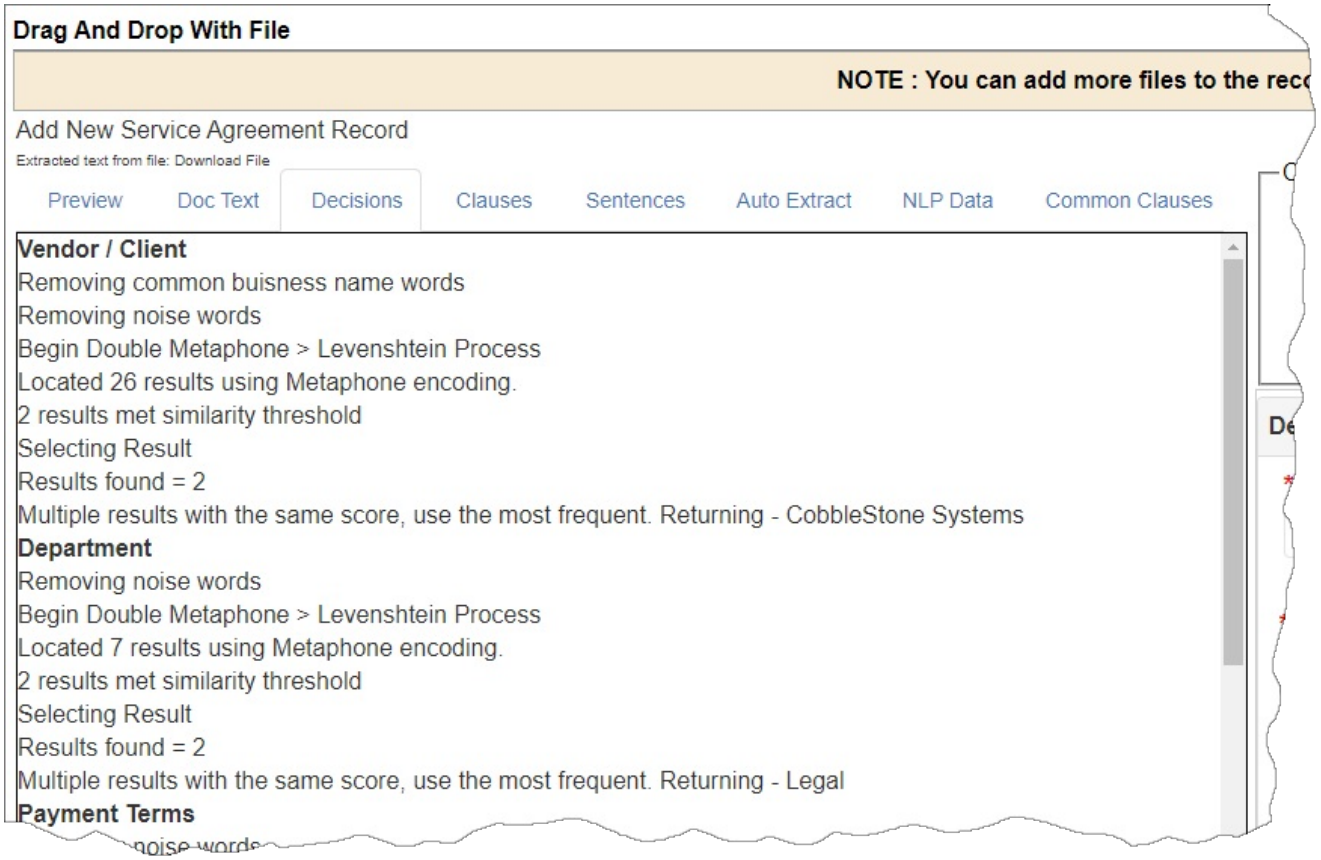
Doc Text: The Doc Text tab shows the text extracted from the document. Due to quality and extraction limitations, this text should be verified as the extracted text is not guaranteed to be exact. Text may not be perfect as it is a result of OCR, scanning, and may be obscured by issue with the text, page breaks, missing pages, overlays, headers, and other items related to document processing.

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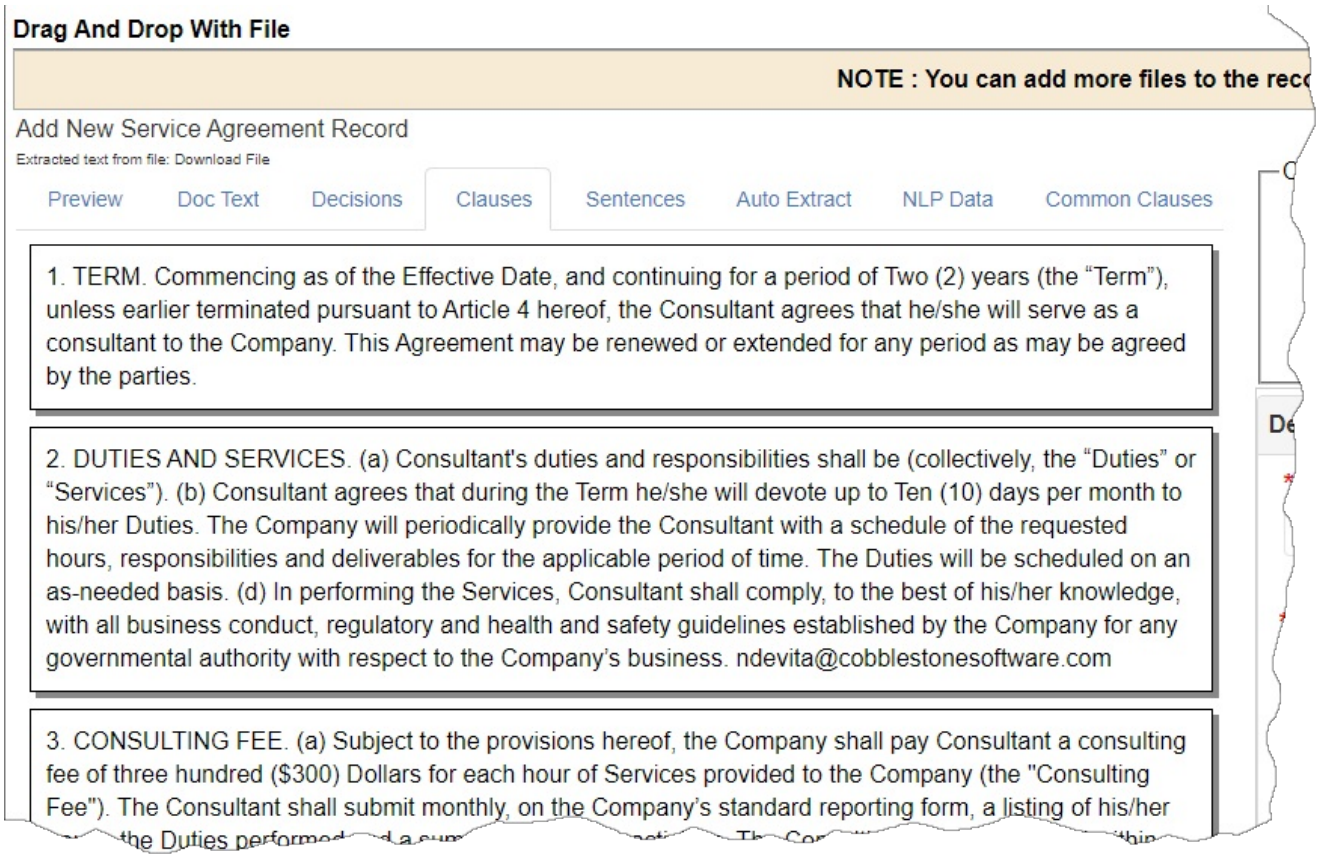
Decisions: The Auto Exact Text tab displays the results VISDOM AI found after running the document thought the configured Auto Extraction rules. Confirmation of the actions should be performed by the legal reviewer.

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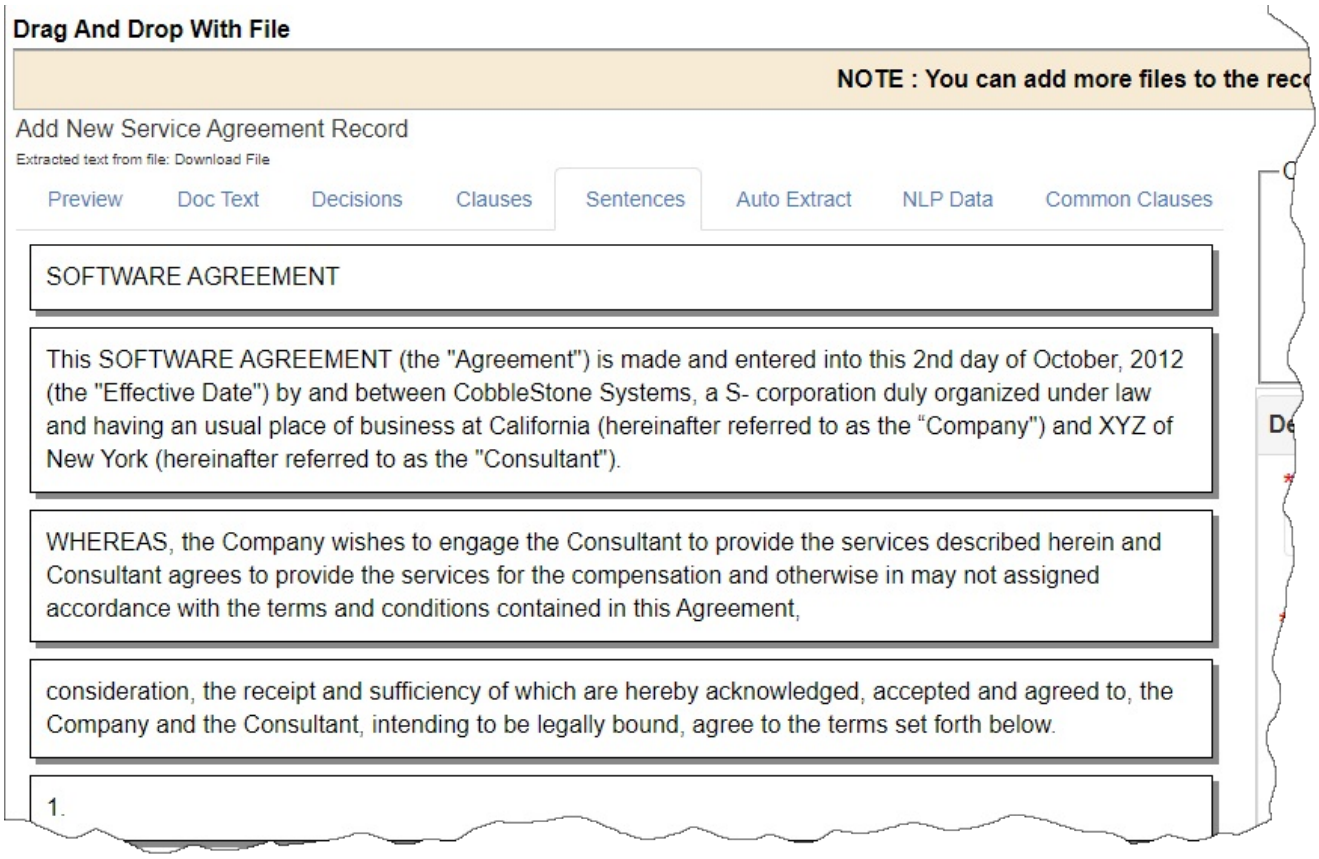
Clauses: The Clauses table tab attempts to extract each clause/paragraph in a separate viewable box. This may be helpful to ease data entry by allowing the user to copy and paste extracted text into data fields.

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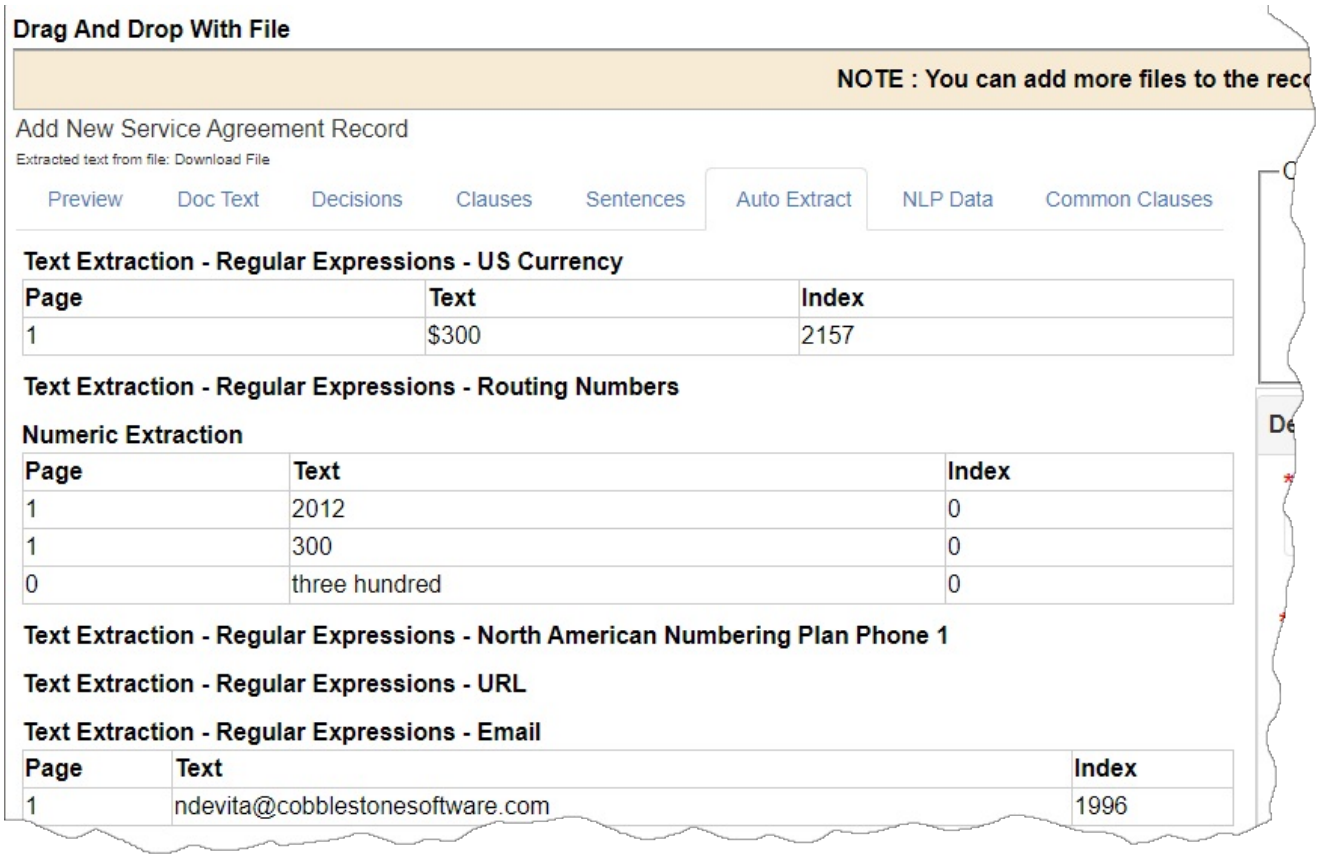
Extract Sentences: The Extract Sentences table tab attempts to extract each sentence in a separate viewable box based on the period/full stop mark (English support). This may be helpful to ease data entry by allowing the user to copy and paste extracted text into data fields.

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Auto Text Extract Tab: The Auto Exact Text tab helps to establish other identifiable information such as dates, numbers, names, locations, etc. based on patterns and other data to which VISDOM has access (e.g., Customer and employee names and related information). In this example, it found a numeric value that it assigned to the Contract Amount field.

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Note: it is recommended to confirm all extraction results prior to saving the data.

Advanced configuration. VISDOM also supports configuration of regex or regular expressions to locate patters of text like social security numbers, bank information, telephone numbers, and more. See a Cobblestone representative for more information about advanced VISDOM text pattern recognition.

Note: The text engine is not exact and a legal professional should review all legal documents.

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Risk Mapper and Profiler

Risk Mapper and Profiler

Risk Mapper & Profiler

The CobbleStone Risk Assessment feature set provides a risk rating engine that enables your organization to define risk categories for exposures to your organization. These exposure and risk levels can be entered on each Contract, Vendor/Customer, Sourcing, or Purchase Order record and enables your team to assess the amount of risk for each exposure category and define the probability (or likelihood) the risk may occur. Overtime, and as your organization rates each high-risk item on contracts, vendors, purchases, and/or sourcing records, your organization can quickly identify high risk items that are outside acceptable range of risk. This provides a standards-based method to identify risk and re-evaluate the outlying risks on these records. Some of the notable goals of risk management enable organizations to:

- Identify significant risk categories (items) from an organization's operations;
- Establish organization wide risk acceptance policies and guidance by risk category;
- Rank and identify high level of risk to the organization with a high probably the risk may negatively impact the organization;
- Review and log risk events by quantifying the risk and logging the risk (typically on high risk contracts, vendors/customers, purchases);
- Recognize trends with risk and implement practices to routine review risk;
- Implement strategies and techniques or practices to reduce the risk exposure or reduce the probability or likelihood the risk will occur;
- Monitor risk, reduce the risk, and/or avoid the risk



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The Cobblestone Software Risk Mapper and Risk Profiler tool enables authorized contract managers, procurement specialists, and risk managers (any authorized users) to track risk for each contract record (or vendor/customer, sourcing, or purchase order records) and easily summarize, plot, and identify high risk items. It gives legal, procurement and risk managers a simple yet advanced tool to identify and reduce risk items that fall outside an acceptable boundary as established by a specific organizations policies and rules. As a rule of thumb, always seek legal and professional advice for any risk related to contracts.

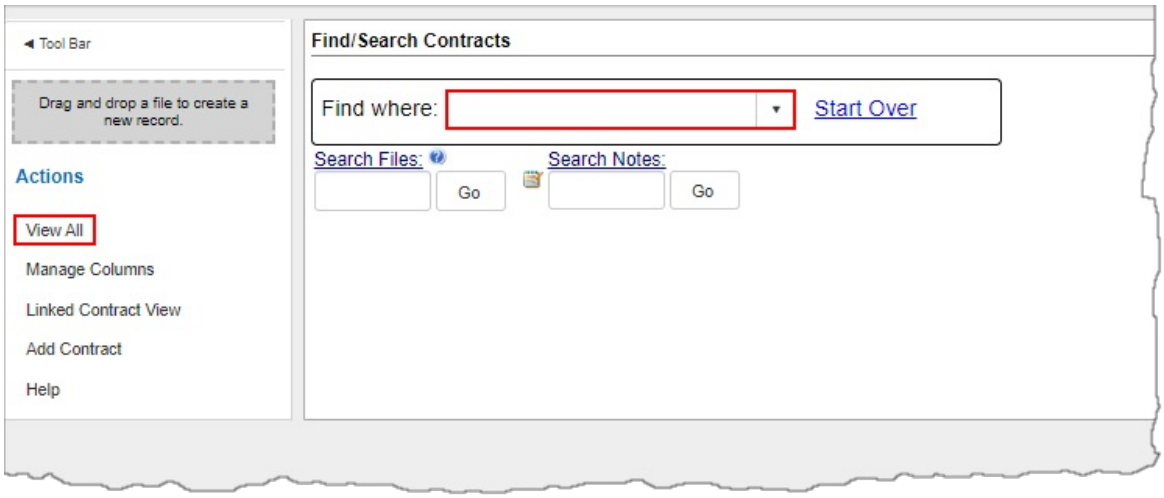
For this documentation, we will be entering and monitoring risk for contract records. The steps to enter and monitor risk for sourcing, vendor/customer, and purchase order records are similar.

Enter Risk Rating for Each Exposure

1. To enter a risk rating on a contract, log in as an authorized system admin user and navigate to **Contracts - Find/Search Contracts**.

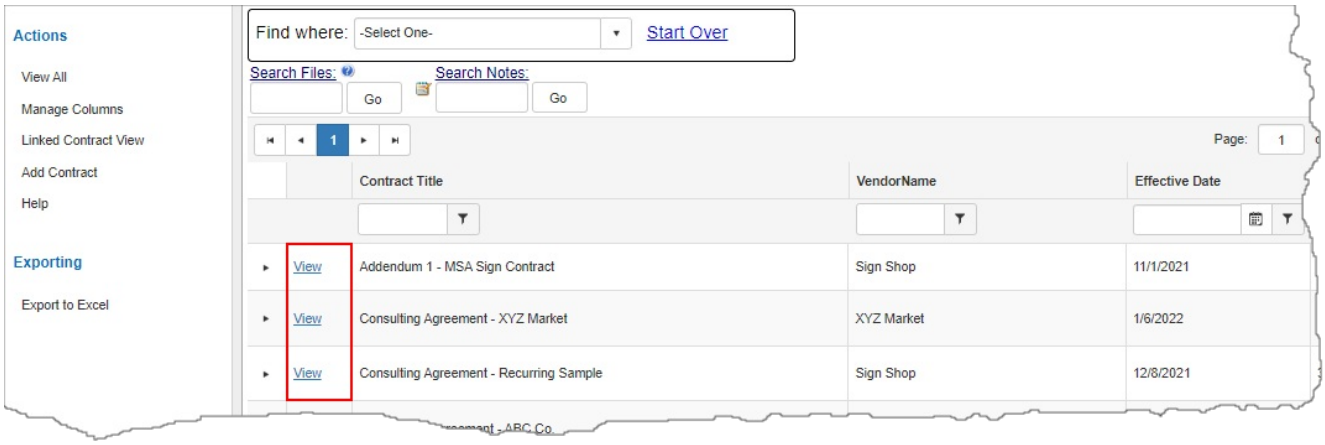


2. Search the available contracts.

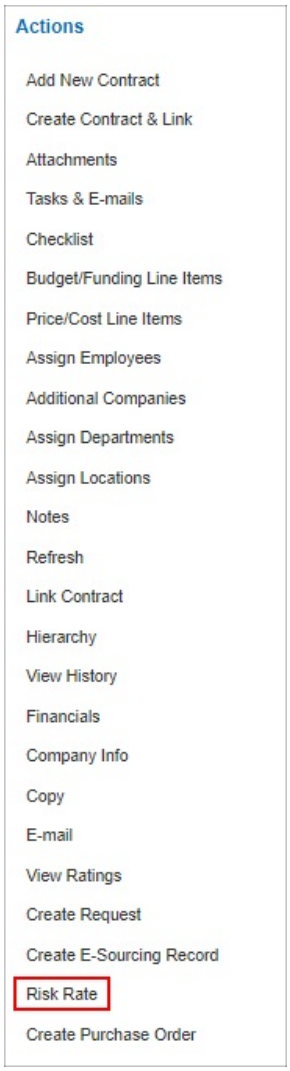


3. Click **View** for the desired record to open its Contract Details screen.

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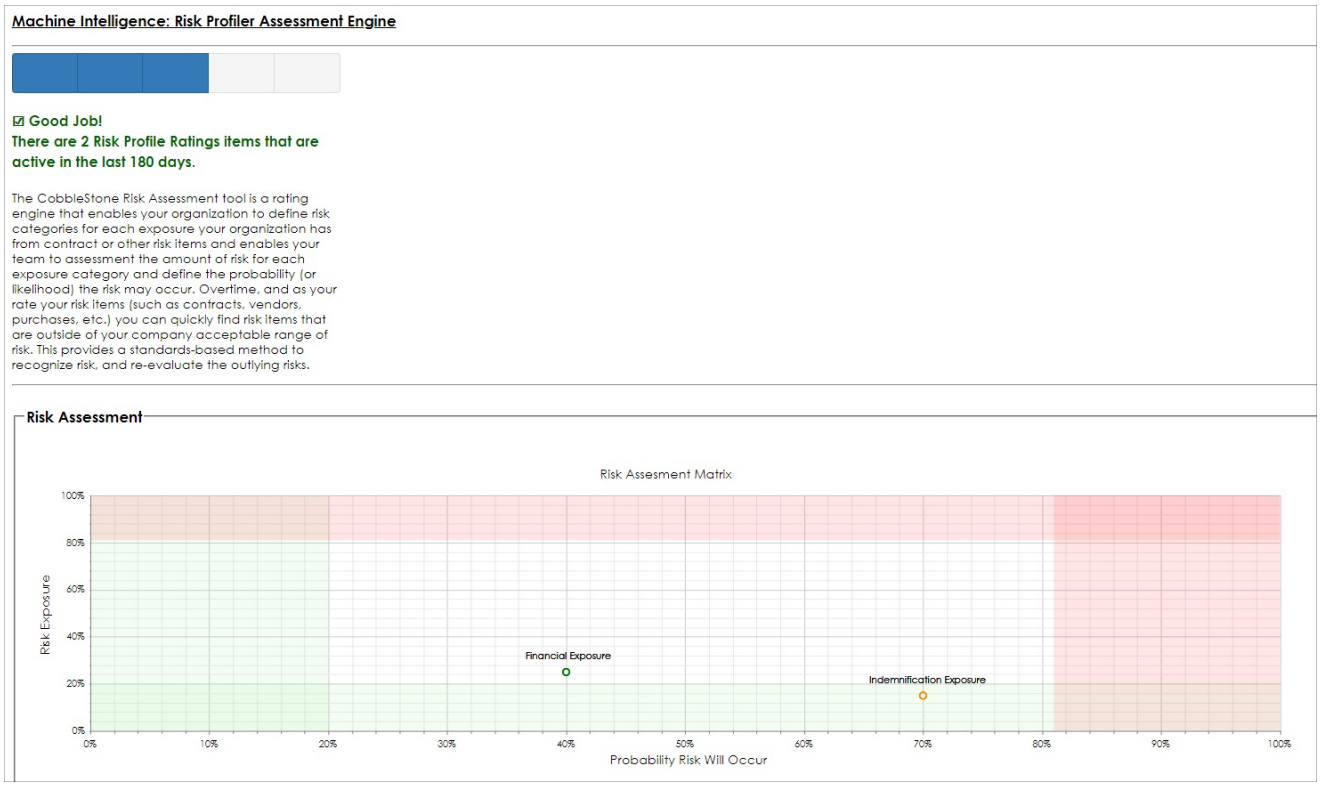
4. The **Contract Details** screen appears. Scroll down and, on the side menu, click **Risk Rate**.



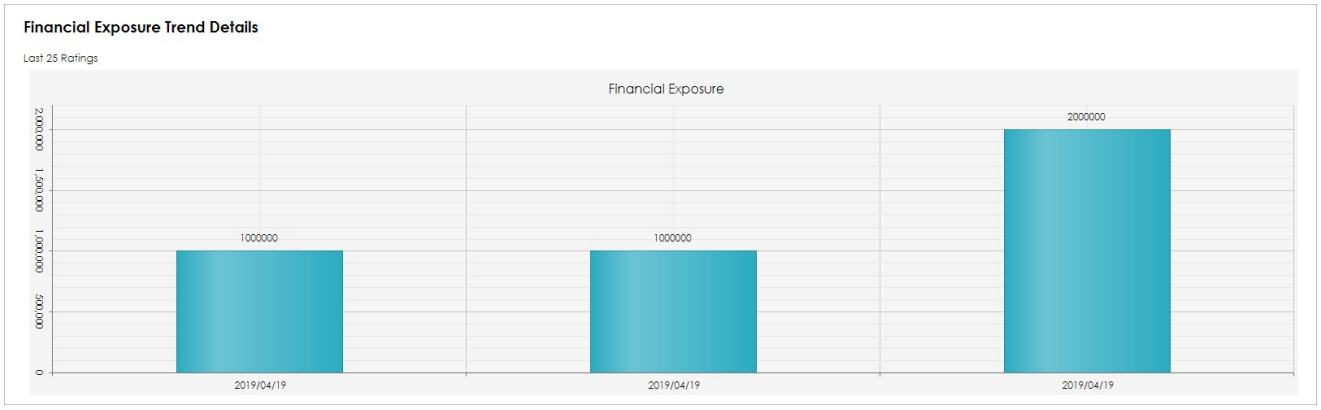
5. The **Risk Assessment Risk Mapper** screen appears for this record showing defined ratings for this record.

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6. A progress indicator denotes how many risk ratings were entered in the last 180 days. If prior risk items were entered, the Risk Matrix mapper appears.



Bar graphs and trends show for prior rating items for this record.



7. To enter a new Risk Rating item, select The **Rating Category** (to manage Risk Rating Category Items, use the **Risk Rating Category List** item screen described later in this document).

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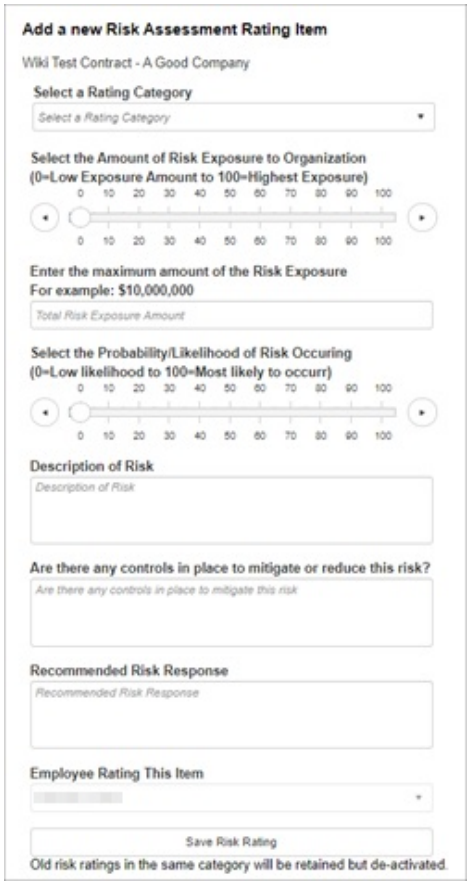
8. Select the **Exposure Level** based on a percentage. For example, if for a specified Risk Item, the organization can accept $5,000,000 in exposure, and the contract has $2,500,000 in exposure for the rated category, select 50%. If the highest exposure allowable for this risk category is $10,000,000 and the contract has $10,000,000 actual exposure, select 100% (tip: using percentages helps with comparison with risk categories and is standard method for risk probably rating).

9. Enter the actual quantitative value for risk exposure. In this example, we entered 1,000,000. Then, select the probability this exposure may happen. In this example, we select 15% indicating there is a 15% chance (likelihood) this will occur).

10. Enter a description of the risk to help later with identifying the risk.

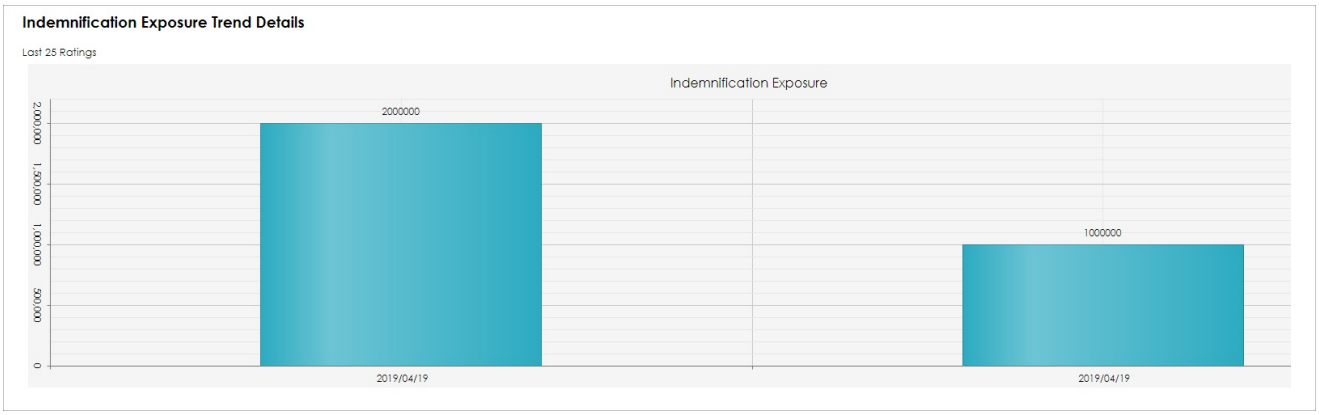
11. Enter any controls or mitigation procedures that have been/can be performed to reduce this risk.

12. Click **Save Risk Rating**.

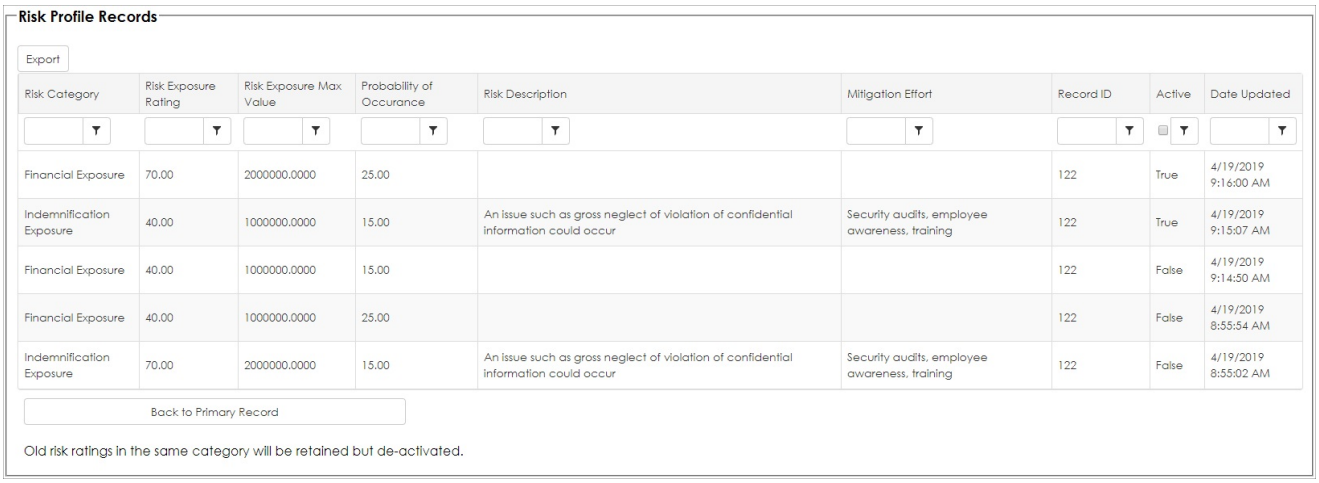


The newly entered Risk Rating Item is saved and shown on the bar graph. If there are prior entries for the same Risk Rating Item, the bar graph shows a trend. In the example below, the Indemnification Exposure risk exposure is trending downward.

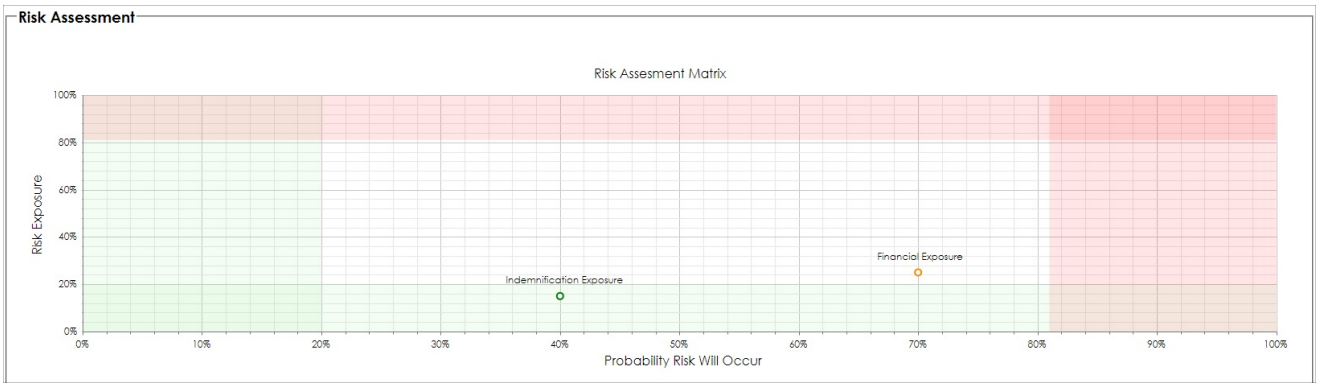
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In addition, a detail grid of the prior Risk Items entered are shown on the **Risk Profile Records details**.



Moreover, a summarized **Risk Mapper plot** (matrix) is displayed showing the most recent risk items, plotted on a standard risk map (sample seen below). We can quickly identify rated items that are risky (they are plotted in the upper-right hand area).



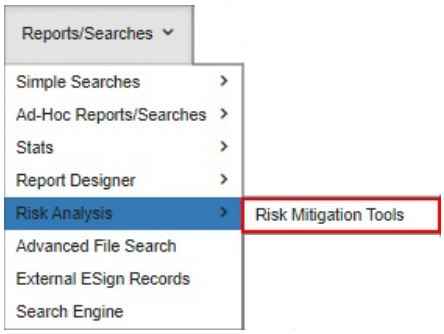
Monitoring Risk

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The CobbleStone Software Risk Mapper and Risk Profile tool includes a handy feature to help monitor high risk records from a holistic view. This tool provides risk managers [authorized users] the ability to view high risk exposures that fall outside the acceptable bounds for the last 1,000 rated items ordered by the higher risk items (higher risk items are determined by the Risk Probability Percentage multiplied by the Risk-Exposure-Level).

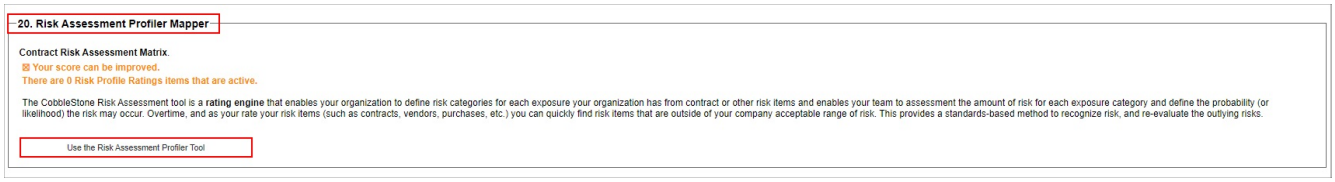
1. To view the **Risk Mapper Profile tool** as an overall view, navigate to **Reports/Searches - Risk Analysis - Risk Mitigation Tools**.

2. The **Risk Mitigation Tool screen** displays.



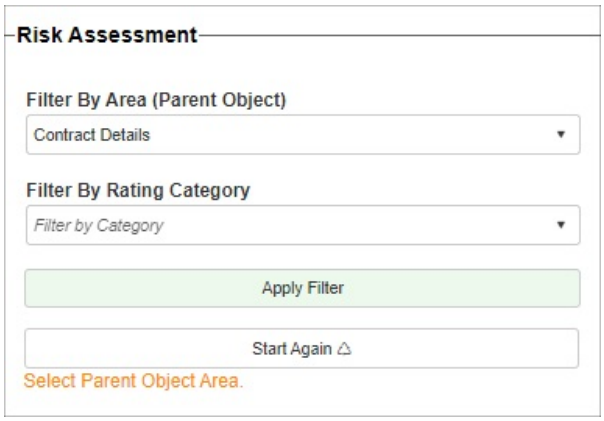
3. Scroll down and locate the **Risk Assessment Profiler Mapper** option (the item number may change based on the version of CobbleStone utilized).

4. Click **Use the Risk Assessment Profiler Tool** to view the Risk Mapper Matrix.

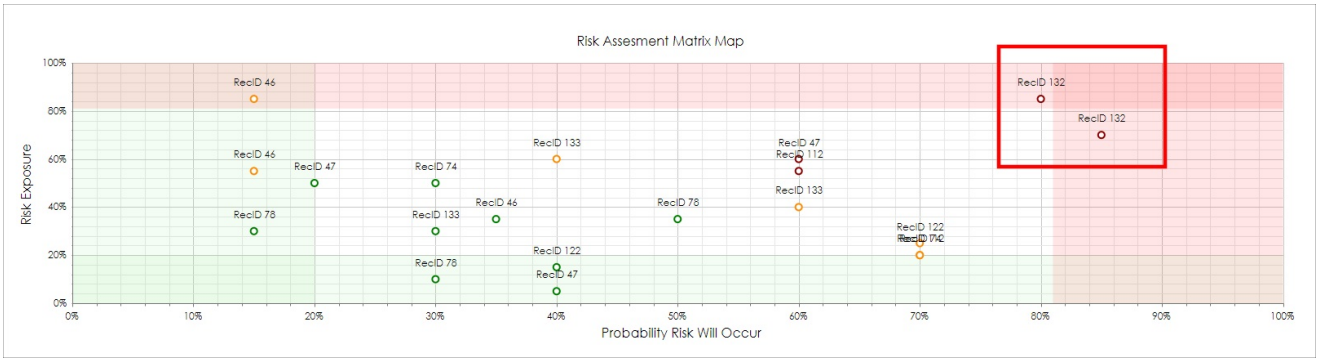


5. The **Risk Profile Map** displays. Select the Area (Parent Object) on which to filter. For this example, we selected the Contract Details object.

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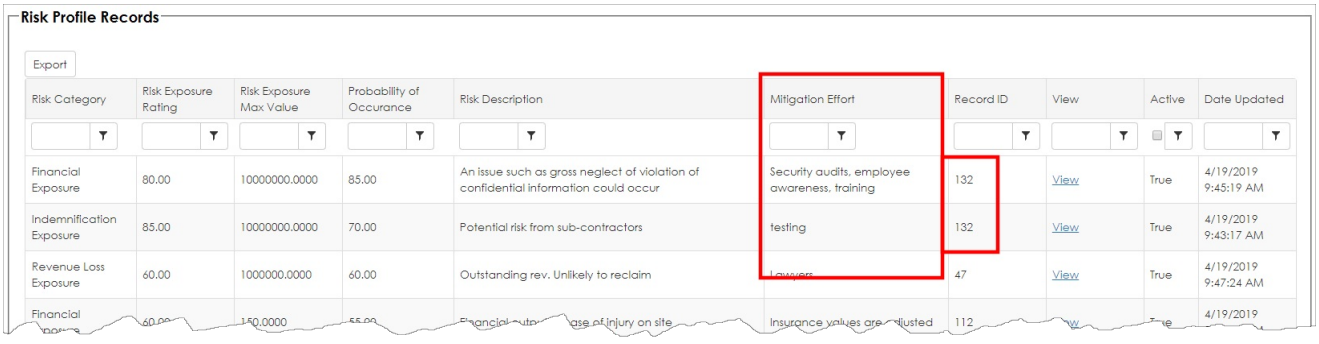


6. Click **Apply Filter**. The **Risk Assessment Matrix Map** displays. In our example below, we see two Risk Rating items that are at the upper right of the map plot (towards the red section seen below). We should review these items to see if we can reduce risk. The **Risk Map Plot** shows that both rated items are on Record ID 132 (in this case, it is a Contract Record ID). By scrolling down lower on the page, we can see the details for this record and view the contract details for these Risk Items.



7. Click **View** for the record to review.

8. Next, it is up to the Risk Manager on how to reduce risk. Some typical risk reduction. If each of the Risk Items that are rated are documented properly, the Risk Manager can review the risk reduction recommendations that the entered previously in the Mitigation Effort column.



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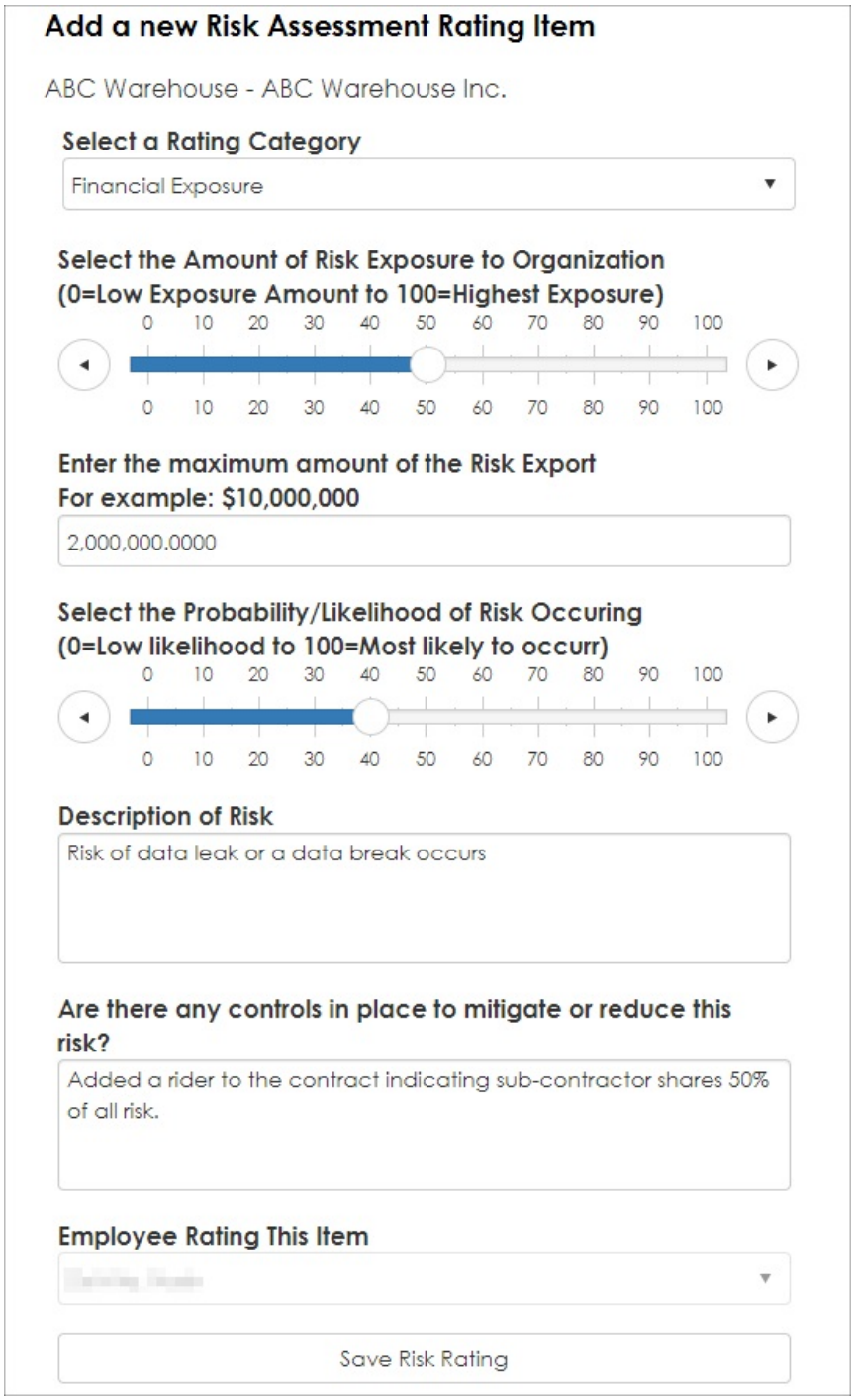
Below are additional items that typically can reduce contract risk (but is not a complete list as each risk situation varies):

- the contract can be re-negotiated
- an amendment can be made to reduce risk
- insurance can be purchased to offsite liability
- the risk can be transferred to a third-party
- carve-outs may be an option
- contract cancellation
- security controls or audits can be implemented
- legal advice can be sought

No matter the method of reducing risk, as always, seek legal advice from an attorney.

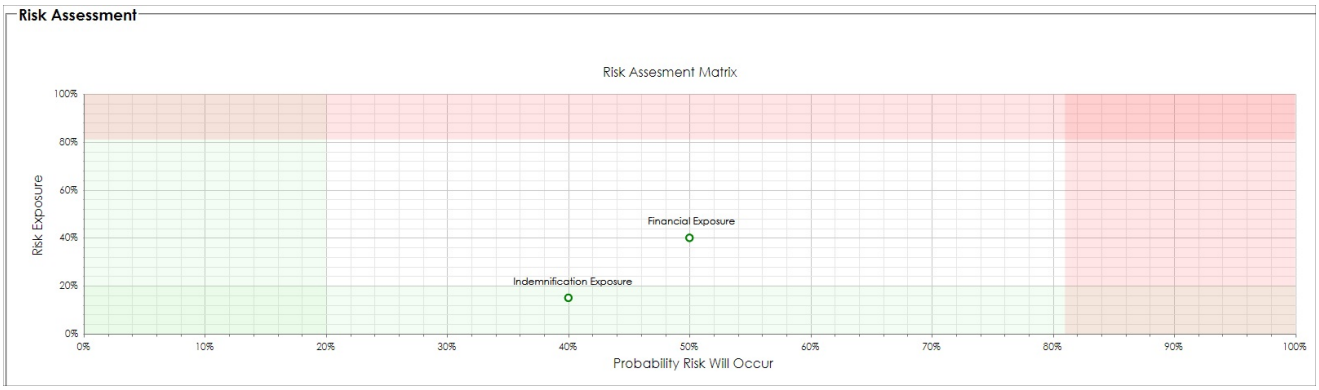
Routinely re-rate the risk items on the record. In this case, we will re-rate as we amended our subcontract:

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Our financial exposure is now in the white area and shows as acceptable.

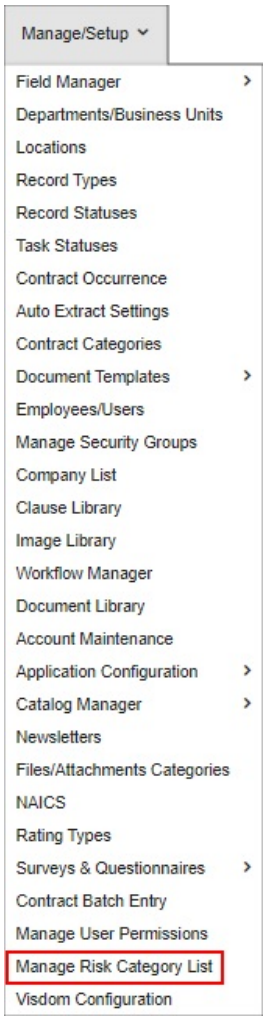
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Configuring Risk Mapper Category Items

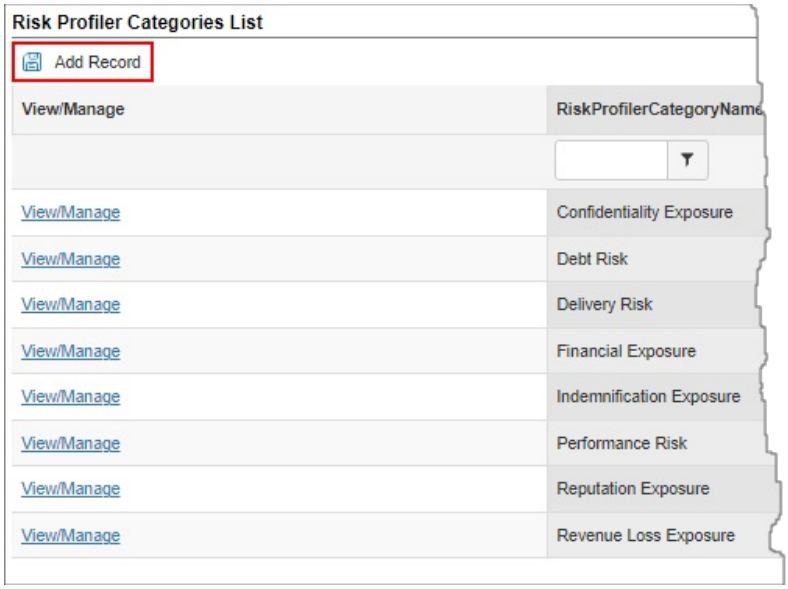
1. To configure risk mapper category items, log into the system as a system administrator.

2. Navigate to **Manage/Setup - Application Configuration - Risk Mapper Category List** (the menu item may be named differently).



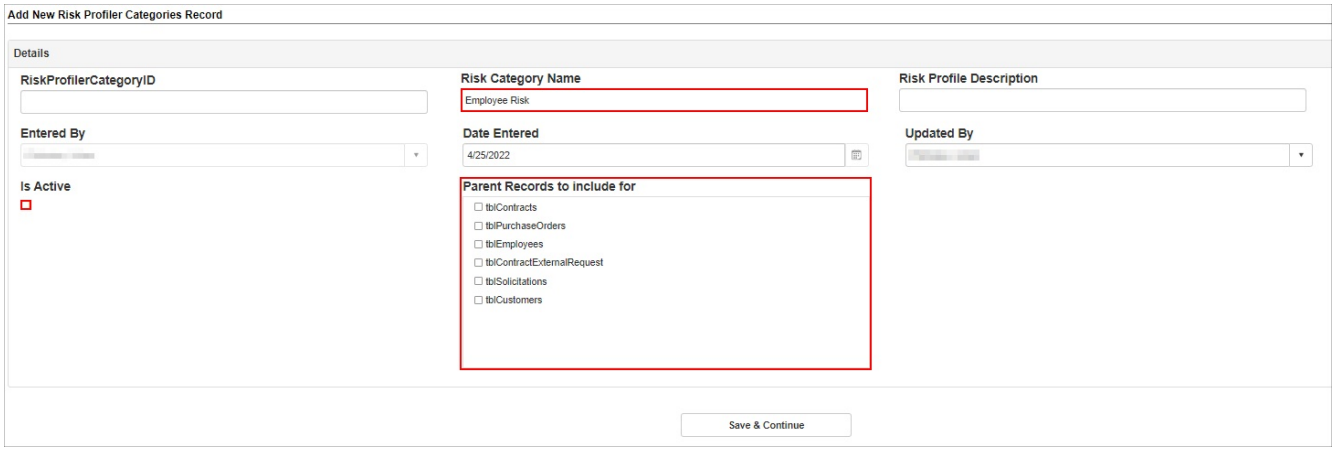
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3. The **Risk Mapper Category List** displays. To add a new Risk Category, click **Add Record**.



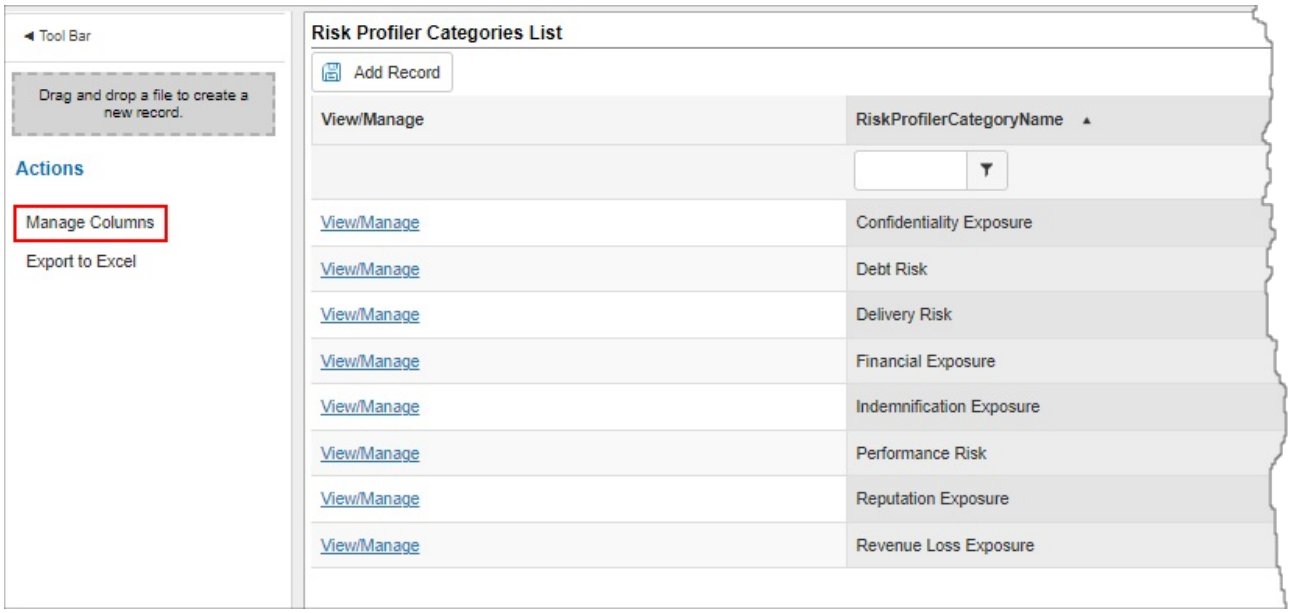
4. The **Risk Category Add Screen** displays. Enter the **Risk Category Name**, set the **Is Active** field to true by selecting the checkbox, and set the **Parent Record to include** [Parent Object]. In this example, we are configuring a Risk Category for the Contract Records parent object.

5. Click **Save & Continue**.

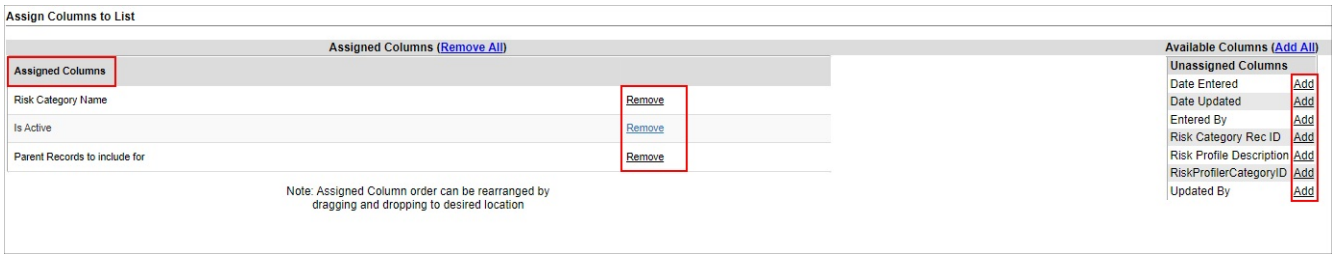


6. To manage the columns that appear for this configuration list, click **Manage Columns**.

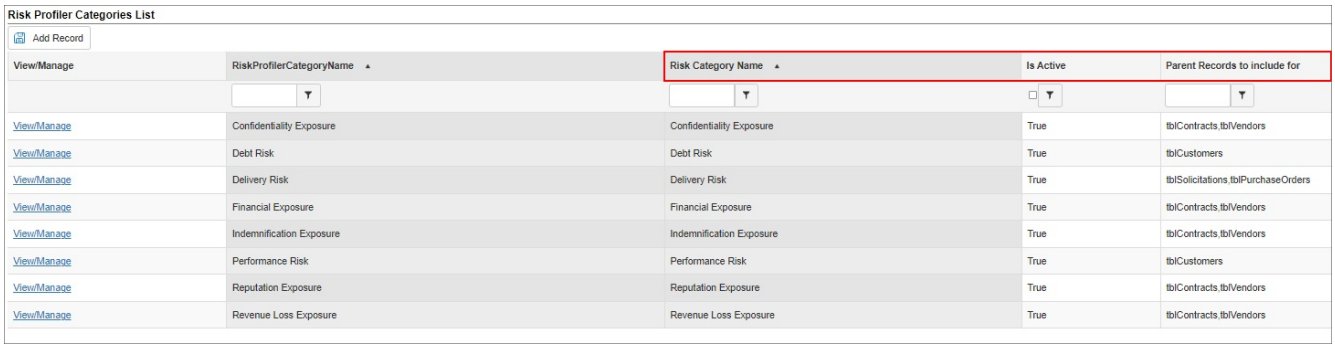
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For our example, the following field columns were assigned: Risk Category Name, Is Active, Parents Records to include.



7.Click **Back to List** on the side menu.



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Bulk Text Extraction and File Migration Tool

Bulk Text Extraction and File Migration Tool

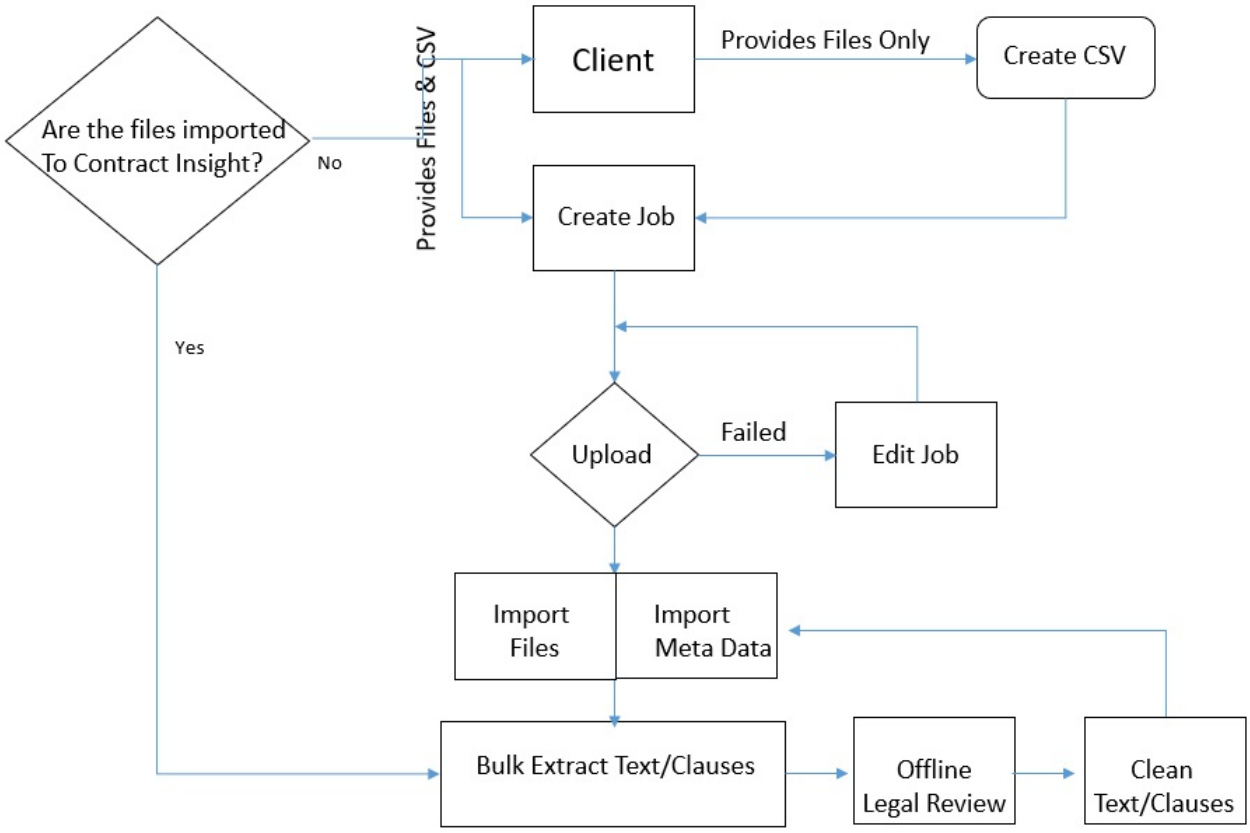
Bulk Text Extraction and File Migration Tool

Challenge: Many of CobbleStone's customers have numerous legal and contract documents that may or may not have been cataloged well or entered into a database to be tracked and searched. The task of extracting data fields, text, and clauses may be an arduous one. In many cases, help streamlining the data extraction process is required. Typical data that are requested to be extracted include but are not limited to: customer/vendor (counterparty) name, address, city state, zip, contract effective date, contract expiration, title, and contract owner (legal professional) name. For more advanced projects, extraction of clauses and terms may pose a challenge. Image if many files are in a folder system or network file system. It may be difficult to locate a contract document and/or analyse the data from the spreadsheet (data) to the actual contract document/file.

Cobblestone offers a combination of services and software tools to help with the extraction of metadata and clause text from files and bulk importing the files and metadata to Contract Insight. These tools in include, **Bulk File Migration Tool**, **Bulk Text Extraction**, **Data Import Tools** for metadata import and update, and **Batch Contract Entry**.

In this section, we will cover the **Bulk File uploader tool** (available via professional services from Cobblestone) and the **Bulk Text Extraction tool** (available within the Contract Insight Enterprise Software application).

A typical bulk extraction process includes the following activities:



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Bulk File Importer Tool. The Bulk File Importer was designed to CobbleStone personal via professional services the ability to bulk upload files to a client's Contract Insight Enterprise Software SaaS database without requiring direct access to the database server. The bulk file importer process is discussed separately in this documentation wiki.

Bulk Text and Clause Extraction

The steps below focus on the extract text and clauses from contract documents after the files have been imported to Contract Insight Enterprise. This process requires the Enterprise Edition, text-based files imported to the Contract repository, good quality text in the documentation, administrative access, and having the OCR tool enabled.

1. Log into the system as a System Admin User.

2. Navigate to **Report/Searches - Risk Analysis - Risk Mitigation Tools**.

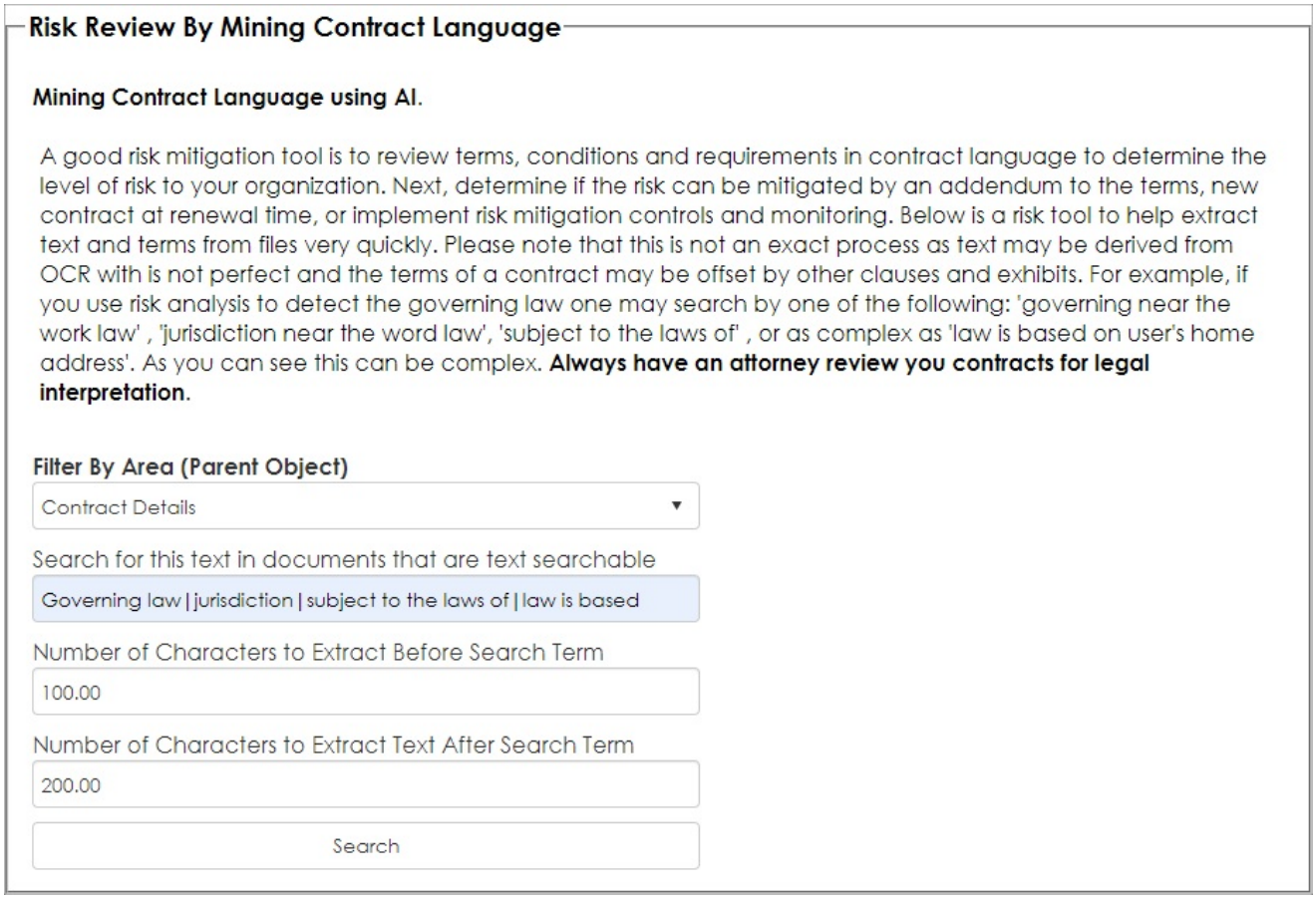


3. Select the **Risk Review with Mining Contract Language** option. This is used to perform bulk text extraction from text-based documents.



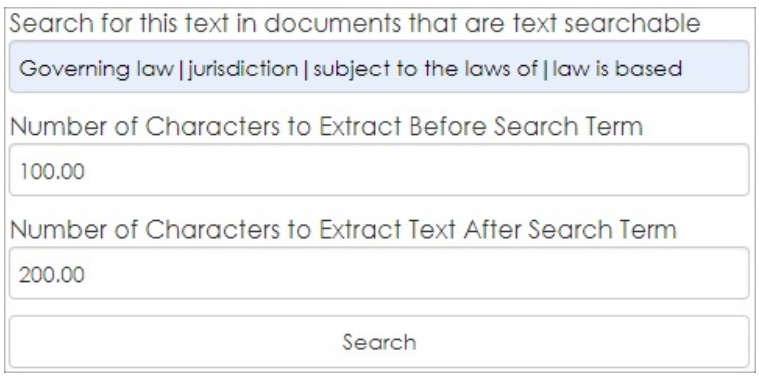
4. The **Text Extraction Tools** screen appears as seen below. Select the **Parent Object**. In this case we are extracting text from files on the Contract records area, so we selected Contract Details.

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5. Tell the engine what text or phrases you are searching for and how many characters to extract from the left of the found text to the right of the fond text or phrase. In this example ware are searching for governing law, jurisdiction, subject to the laws of, and law is based as our search text-phrase seen below. Separate the search terms-phrases with the pipe character (**|**).

We entered 100 for the number of characters to extract before the found term and 200 characters for the number characters to extract after the found term (if the term or phrase is found).



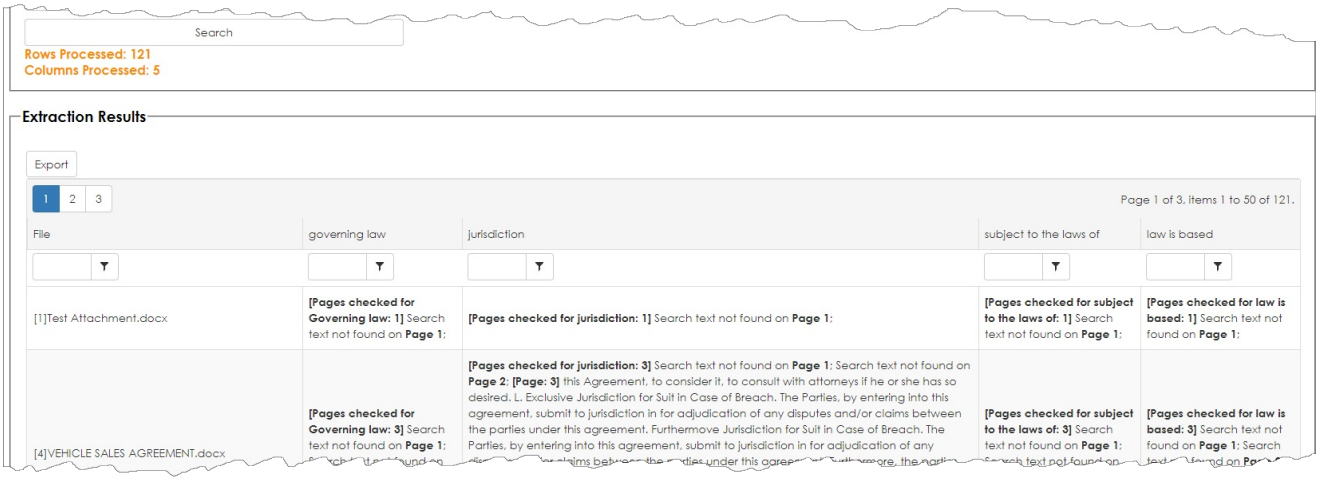
6. Click **Search**.

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The system attempts to search the files attached to contract records that have text in the document.

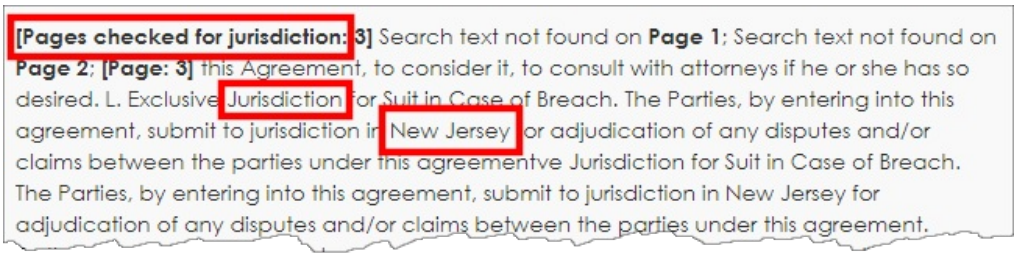
Note: it is important that the files uploaded are text based or have been OCRed to a good quality as text recognition, OCR, and search is not exact. Characters, scanned images, orientations, spacing, font, quality, line separators, and other factors may impact results.

The engine looks at each text document, searched text if text is found, search each page, try to match the search terms or phrases, try to extract the text, and output a column for each text/phrase searched and the results of what was found. If the text extracted is too limiting, broaden the search terms and phrases and search again as typically several passes may be needed.



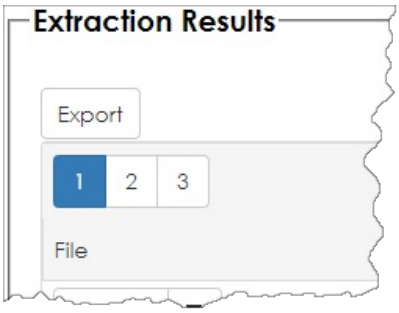
The engine attempts to identify the pages search, if text is found and results. If no text is found, this is indicator to manually review the document as the engine or document did not find text. This is helpful as the legal review team can easily review and determine what the laws may be applicable for this example.

Note: not all results are perfect; an attorney should be retained to perform legal review of legal documents



Optionally, the user may export the results to Excel. This is useful to clean up the extracted text, send it for legal review, and potentially be used to re-import the data back into Contract Insight.

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Below are some sample rows where the bulk extract engine did not have access to the searchable text. Some causes may be the file is an image document and text not searchable, the OCR engine could not OCR, the document is of poor quality or orientation, the files are locked, the files are password protected, the file is corrupted, etc. Each situation is unique and will require legal review by an attorney.



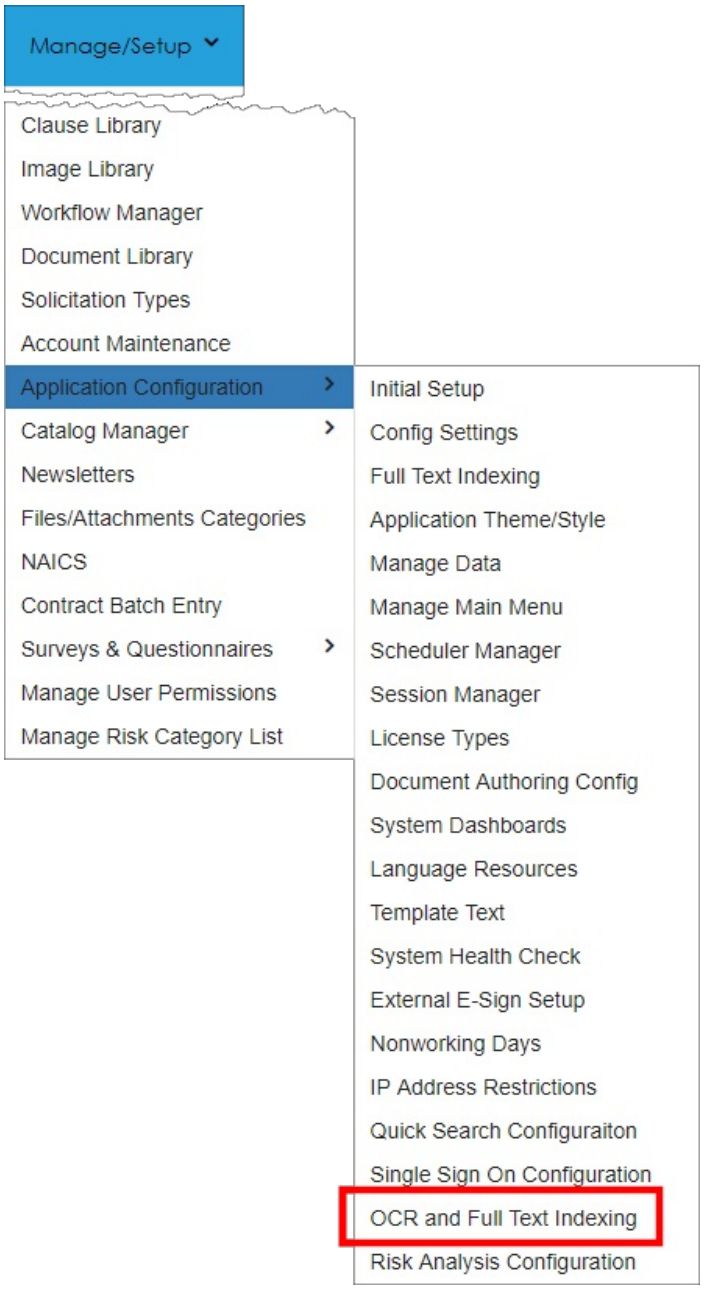
Summary

Data mining and bulk extraction of document text, terms, conditions, and contract language may be useful as good risk review tool. Be aware that this process is not perfect and to use an attorney and your best judgement for each process.

Enable to the OCR Scheduler

Ensure the OCR engine is enabled. To help with text recognition and as required, ensure the OCR engine is enabled and running via the **Application Configuration - OCR and Full Text Indexing engine** menu item. Check with your Cobblestone representative for more information.

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Email Inbox Monitoring

Email Inbox Monitoring

Email Inbox Monitoring [Formerly: Email Drop Box]

Email Inbox Monitoring is a tool that helps monitored a dedicated email inbox using POP email protocol and based on logic identifies emails based on the subject text and imports the email and attachments to the system.

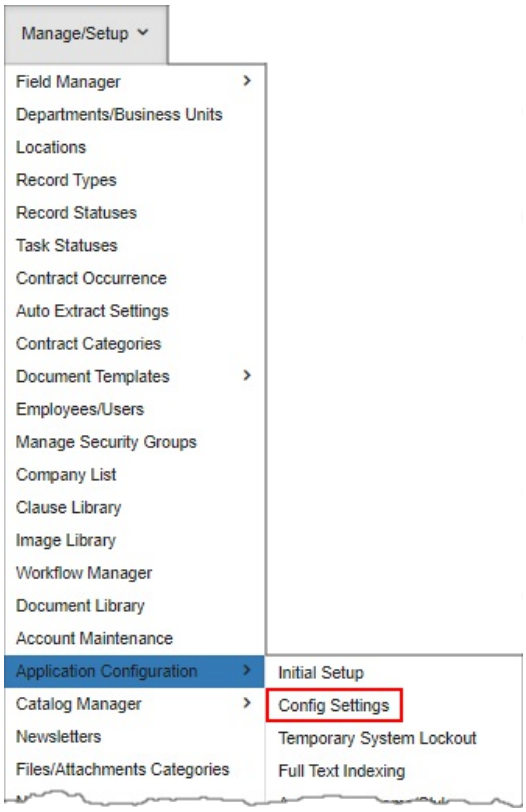
Email Inbox Monitoring Requirements

Requirements: The Email Inbox Monitoring requires several items that may need to be supplied by your organization's IT department:

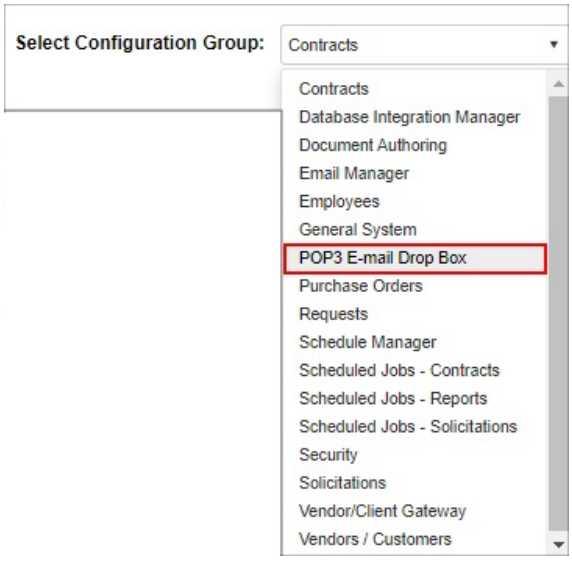
- Contract Insight Enterprise Software License
- Dedicated POP 3 Email box that is accessible by the Contract Insight Software application
- POP 3 Server Name
- POP 3 credentials:
    - POP 3 User Name
    - POP 3 Email Address
    - POP 3 Password
- POP 3 Port
- System Administrator access to Contract Insight Enterprise

1. This information can be configured via the following menu: Setup - Application Configuration - Config Settings.

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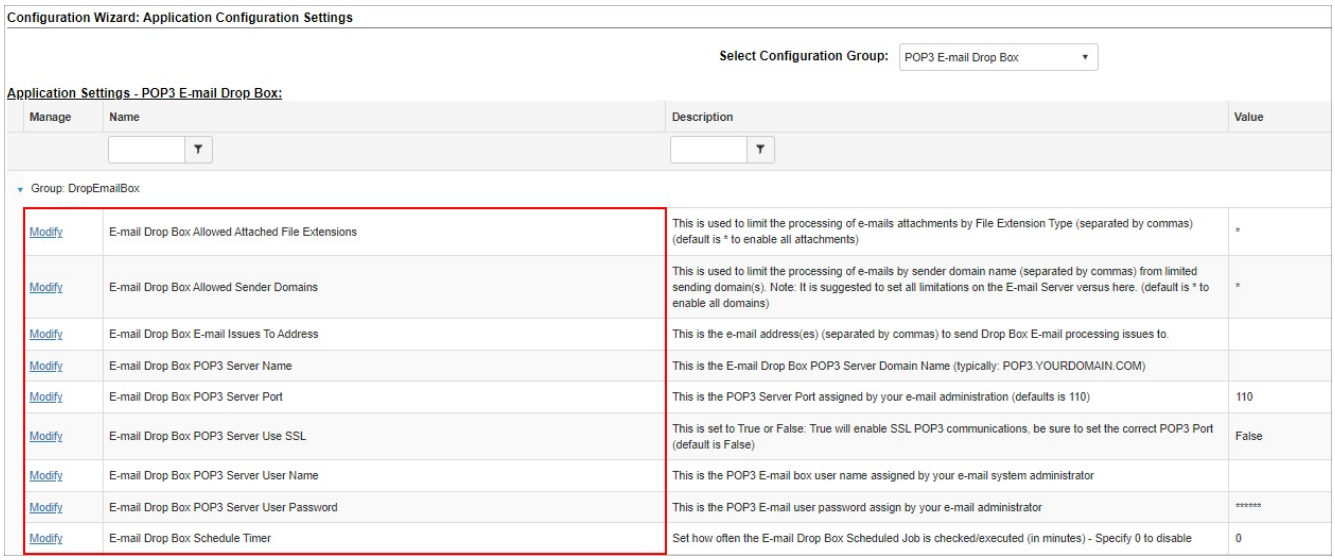


2. The **Application Configuration Settings** page displays. Select the **POP3 Email Drop Box** Configuration Group.



3. Configure the email POP settings. Items 1-3 below should be provided by your IT team or email provider.

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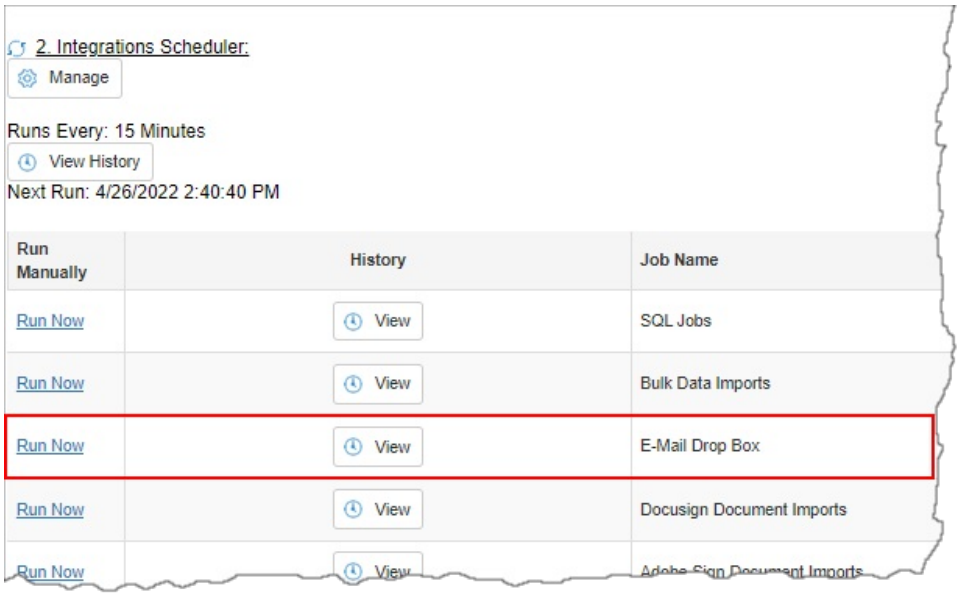
- POP 3 Server Name
- The POP 3 credentials;
    - POP 3 User Name
    - POP 3 Email Address
    - POP 3 Password
- POP 3 Port – typically, PORT 110
- Set the Scheduler in minutes: typically, 30 minutes is enough



Be sure the email account is monitored by a legal professional for any email messages that do not make it into the system. The email import job runs on a scheduler and reads **un-read email messages** in the email box. Be sure that if an email is read in the email POP3 account prior to the job running, the email import job may not import that specific email message or attachment. In addition, it may be beneficial to confirm an email box that also auto forwards the email message to an alternate email that is read and reviewed by a legal professional.

Note: The emailer job runs on a schedule as set in the configuration settings. If needed, a System Admin user can manually run the **Email Drop Box Scheduler Timer job** via the **Application Configuration - Scheduler Manager** screen.

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Adding an attachment to an Existing Record

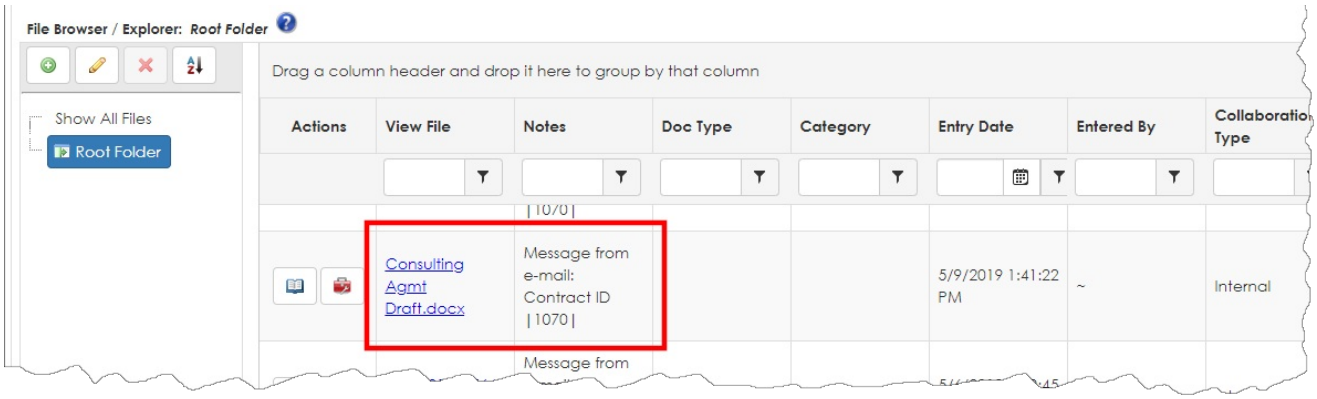
Once the POP 3 email box is configured and tested, a user may send email messages that contain attachments to contract records (and/or vendor/customer, employees, request, solicitations, and purchase order records) based on record ID.

For example, sending an email to the configured email account with the following text in the email's subject will attach the email and files to its record: ContractID|345|. The naming convention text is **ContractID then a pipe character followed by the contract record's system ID number followed by a pipe character with no spaces**. To send an email to a Vendor record with the Vendor ID of 654 we would use VendorID|654| as the subject. You may add other text in the subject such as well. Below is an email sent to box111@cobblestonealerts.com that, if configured correctly, will import the email message to contract record ID 1070 and attached the email message and the Consulting Agmt Draft.docx file. Additionally, the system adds a task alert to the contract record's primary assigned employee to alert the employee there a new file attached to its record.

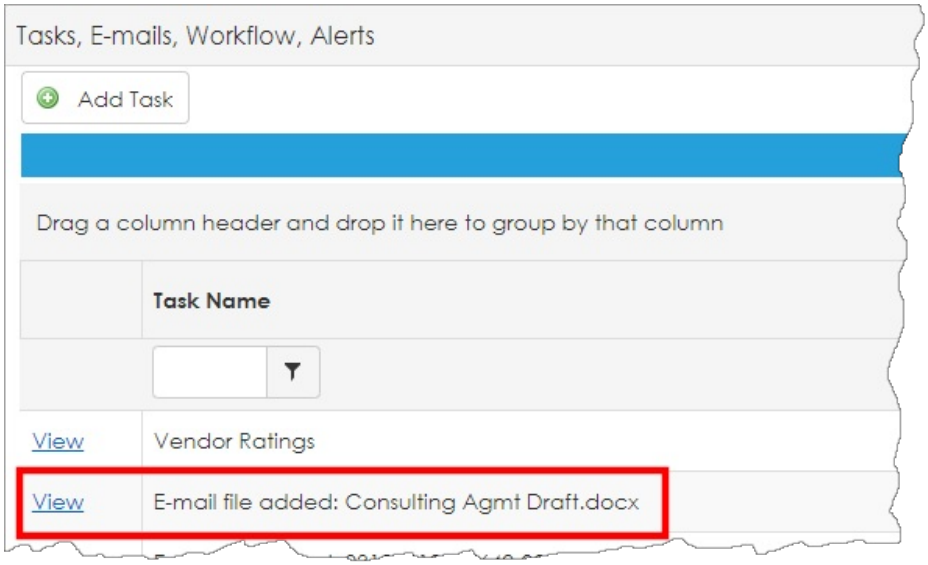


1. After the emailer job runs, the file is attached to the record.

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2. A task is added to the contract record to alert the employee a new file has been added.



3. The task can be set to auto complete via the Emailer settings in the configuration area as mentioned above.

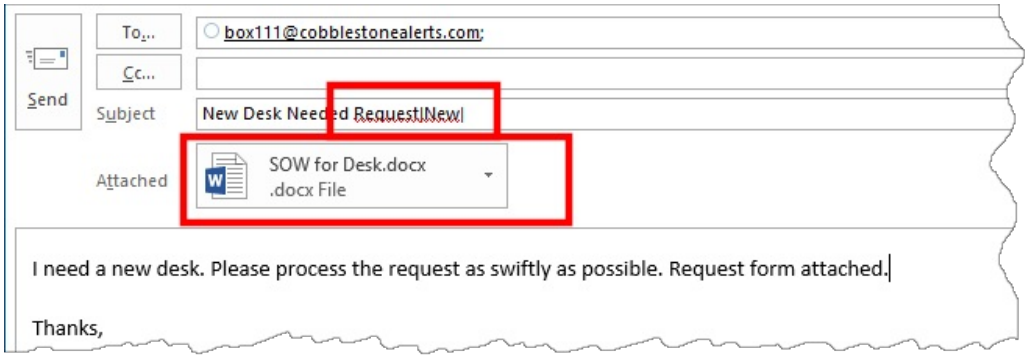
4. Additionally, the email message/ the first part of the email message, depending on length, is added to the contract record's notes section.



Adding a new record from an email

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The email job can create a new record using the Record|new| text. For example, to have the emailer job create a new requisition/request record and attach a file in the system, use the Request|new| text. Be cautious to use this feature as any email sent to the email box will create new records. It may be beneficial to lock the email address down to just internal employees as advised by your IT department. Below we are sending an email to create a new request/requisition record. In the example below, we added a new requisition/request record) for a new desk.



Note: when creating a new record via Email Inbox Monitoring, CobbleStone does not default a record type. The type must be selected on the edit screen. Because of this, the configuration setting related to change of record type must be set to permit such changes.

To learn more about the **Email Box Listener** tool, please contact your account rep.

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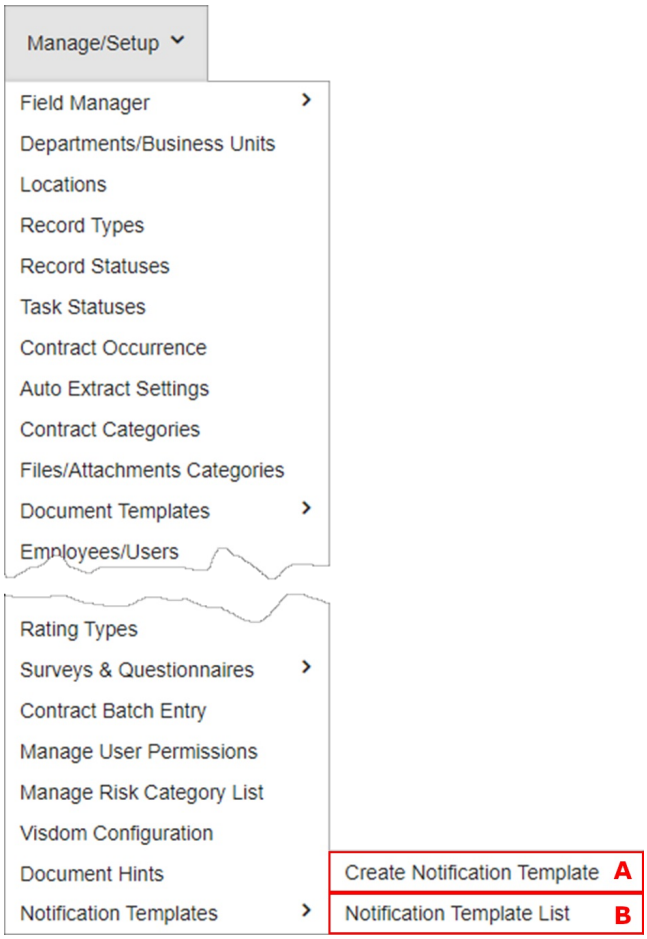
Creating a Notification Template

01. Creating a Notification Template

Alerts & Notifications: Creating a Notification Template

Overview

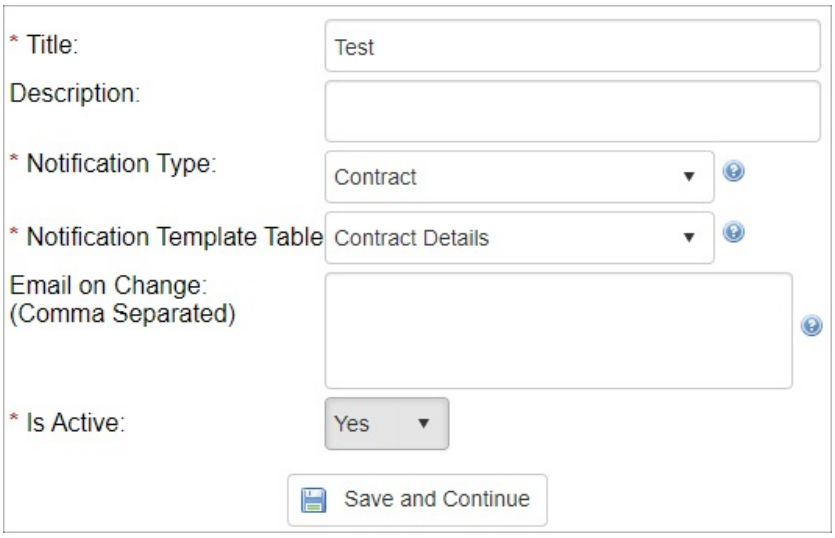
Cobblestone includes a page in the **Manage/Setup** menu for **Notification Templates**. Notification templates are user-defined template-based messages sent to the employee assigned to the record (akin to the three out-of-the-box date alerts).



From the Menu

A. Clicking Create Notification Template brings the user to a screen that allows them to begin the process of creating a new Notification Template. After clicking this option, the user is brought to the following screen, revealing all fields that may apply and are necessary upon creation. Also on this screen is the side menu, which includes many important features (listed below).

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B. Clicking Notification Template List will bring the user to a list of all existing Notification Templates. From here, the user may make changes or get rid of desired Notification Templates if necessary.

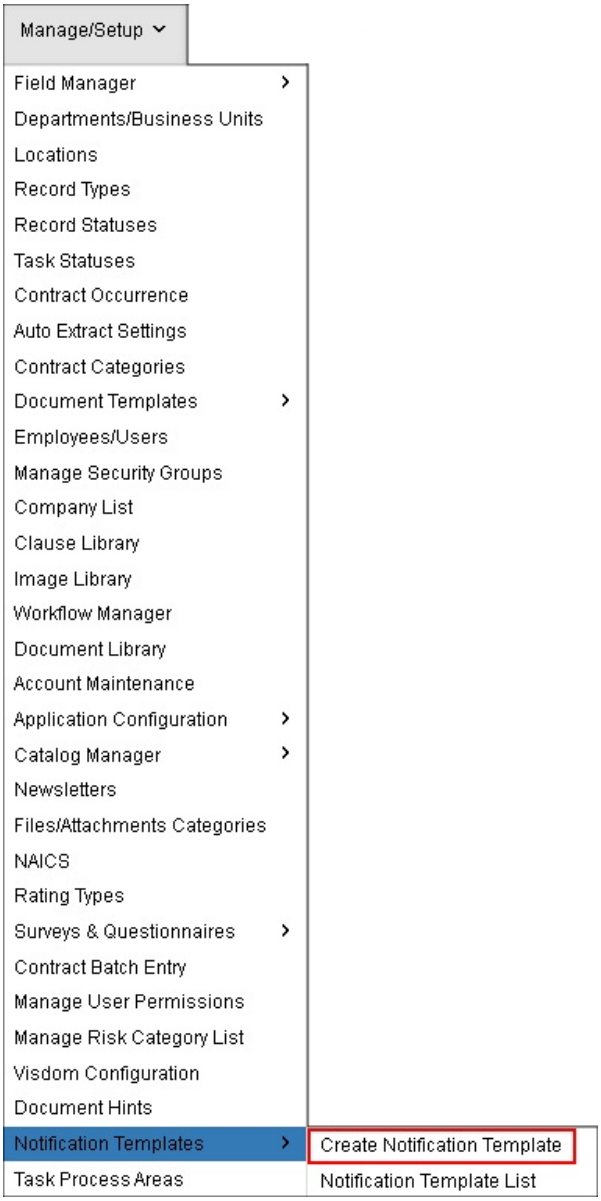
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Create/Edit/Delete a Notification Template

Create/Edit/Delete a Notification Template

Alerts & Notifications: Create/Edit/Delete

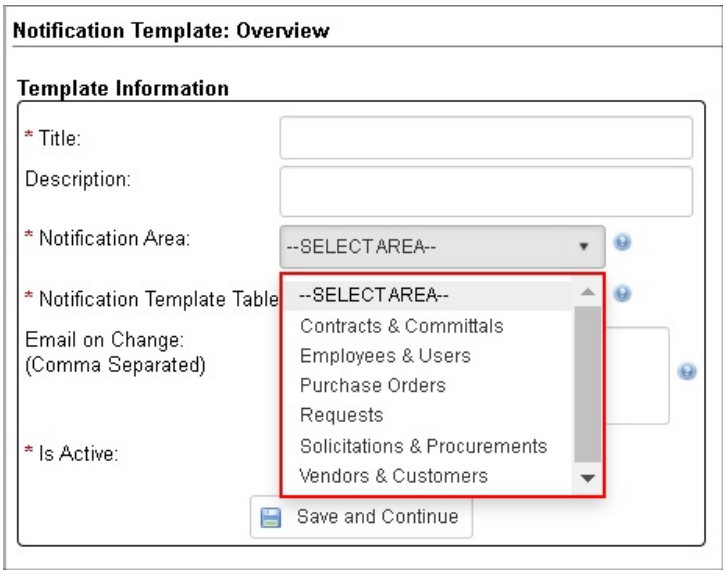
To access Notification Templates, click **Manage/Setup, Notification Templates,** then **Create Notification Template** to begin the creation process, or click **Notification Template List** to view all existing Notification Templates.



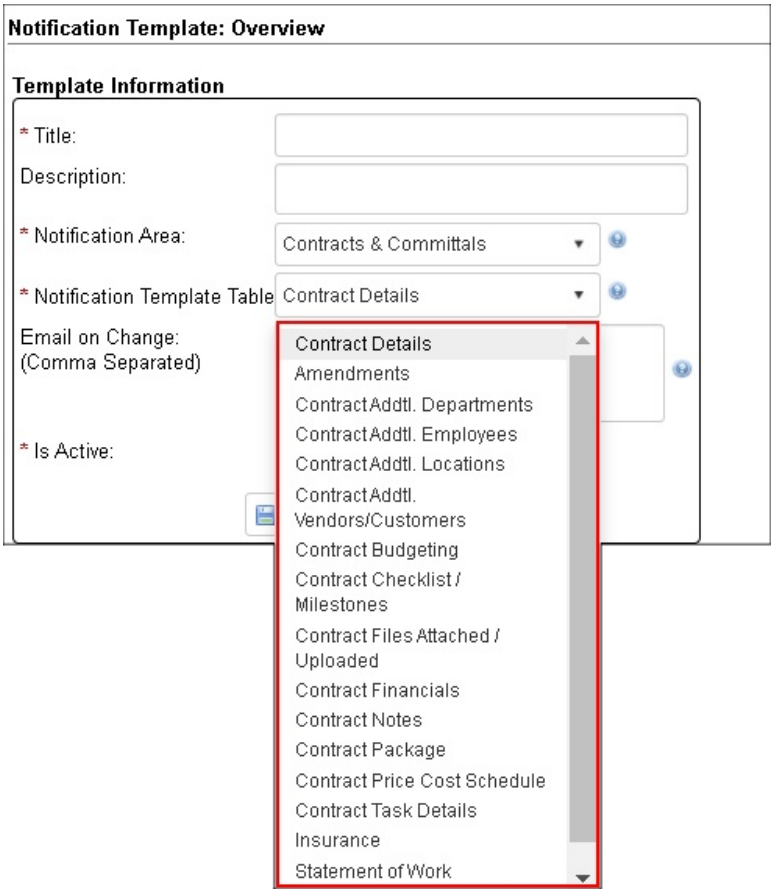
Overview – Create

Upon clicking **Create Notification Template,** the following image displays:

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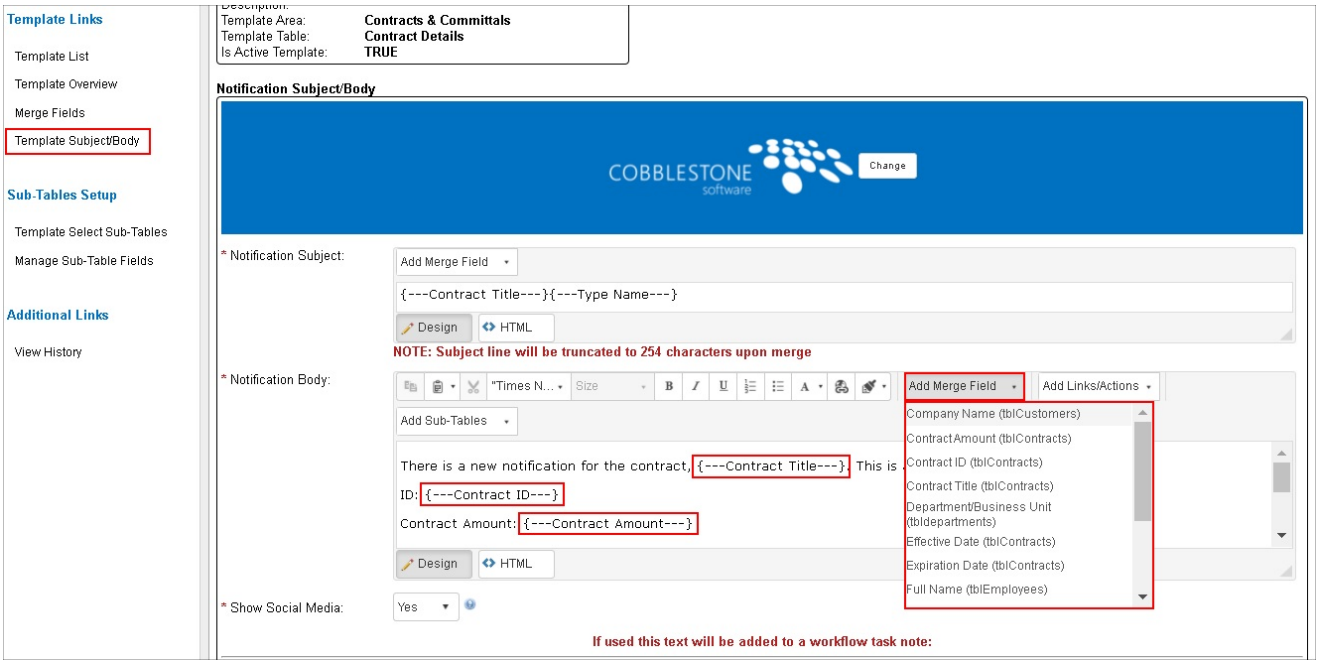


When users are brought to this screen, they will be prompted to select a Notification Area (also pictured above). Once a Notification Area is selected, the user will select any table associated with the selected area.



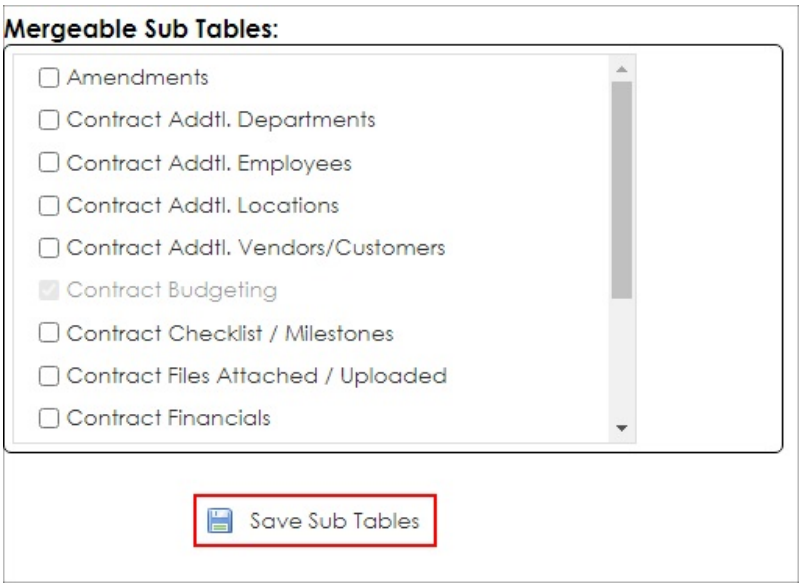
After this, the user will be prompted to begin selecting the fields in which they would like to use on their template(s).

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System admins may use the fields selected in the Template Subject/Body. In this scenario, the task template that is sent out is not that of the generic workflow but is instead set up to the admin's specific needs.

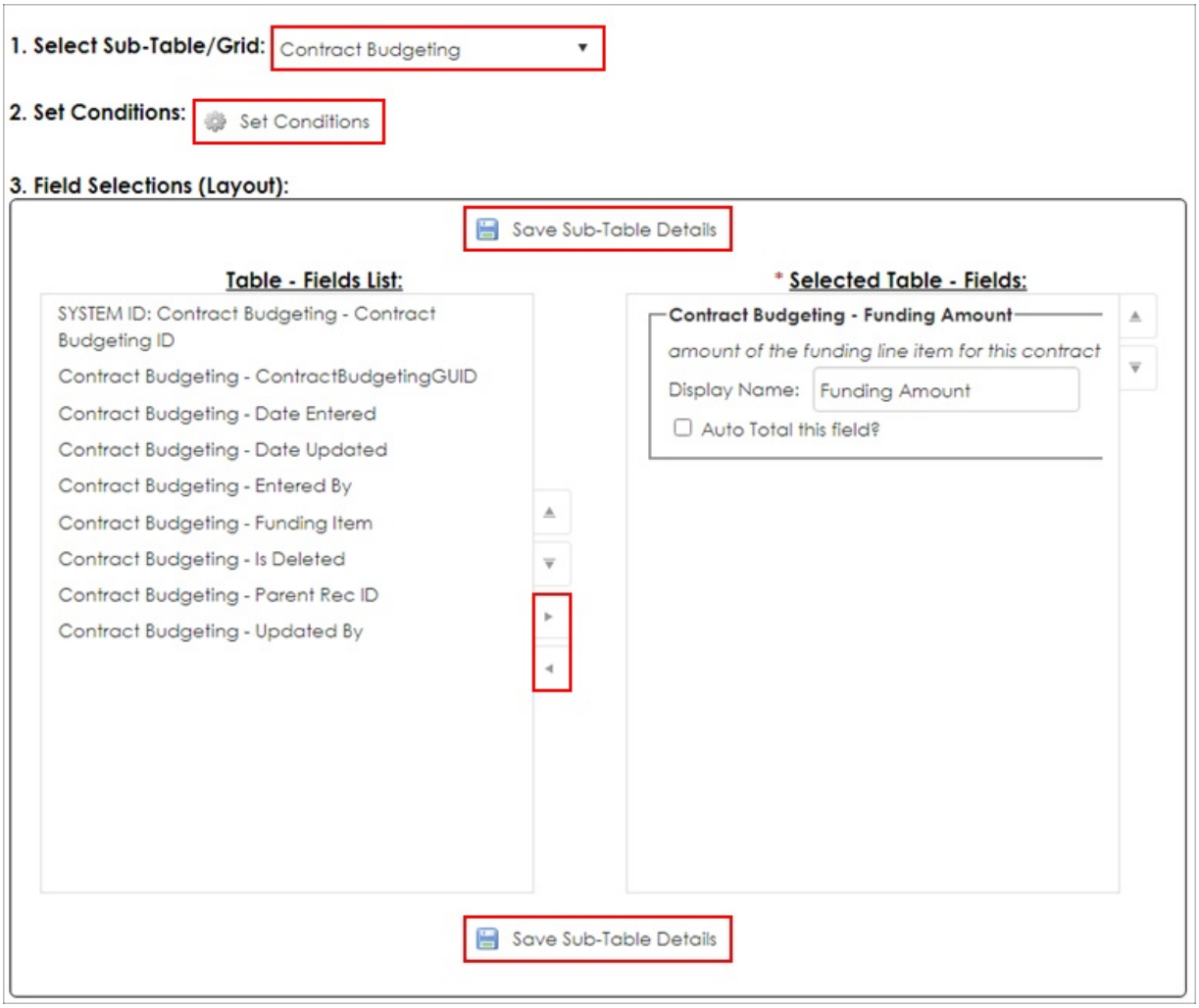
Sub-Tables



To add sub-tables to a notification, you will need to select the ones in which need to be merged (similarly to how the user selects fields to merge in a notification). To do this, click the **Templates Select Sub-Tables** link from the left navigation menu. The user will be taken to the Mergeable Sub-Table page showing all the sub-tables that can be merged. When all desired sub-tables have been selected, click **Save Sub Tables**.

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When the user selects sub-tables, they will then need to select which fields will be used in the sub-table upon being merged. To get here, click **Manage Sub-Table Fields** to get to the sub-table field selection page. Here, the user may pick which fields are merged when the sub-table is created along with any rules for what sub-table data is merged.



1. Select Sub-Table/Grid

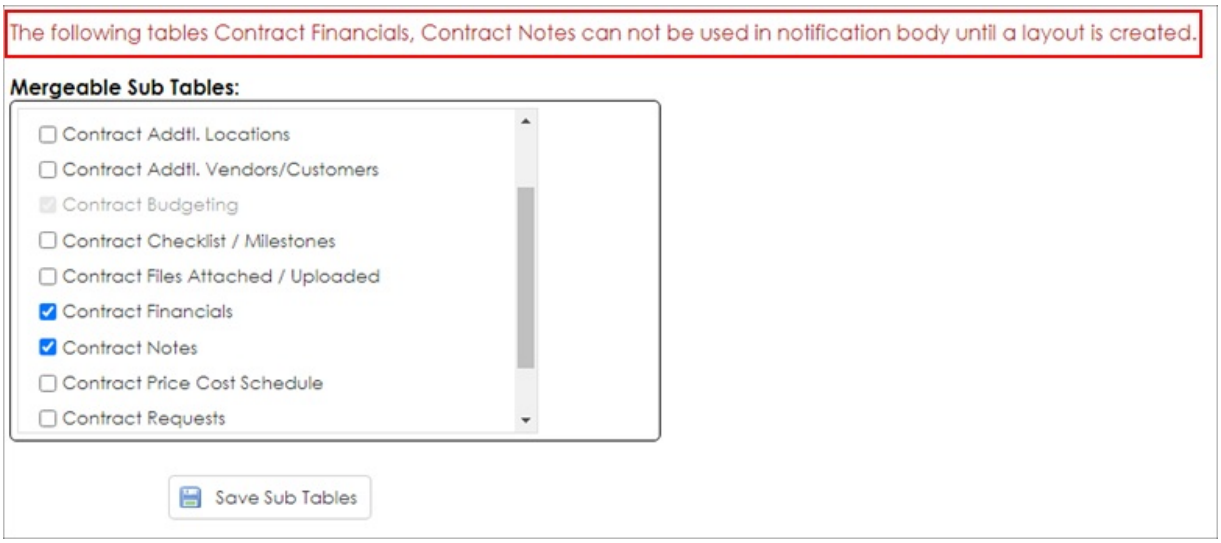
2. Optionally, the user may set conditions as to when this sub-table will merge.

3. Select/Deselect fields using the arrow buttons. Users may change the display name of the field, as well as auto total the field.

4. Upon completion, click **Save Sub-Table Details**. This will add the sub-table to the list of sub-tables that may be merged on the notification subject/body page and/or task note section.

NOTE: If a sub-table is selected but no fields are selected to display, this may not be able to be used on the notification subject/body page and/or the task note section. The system will display the following message, alerting the user.

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If sub-tables are added but do not have any field selected in the **Manage Sub-Table Fields** area, they can not be used in the notification body until fields are selected and layout is created.

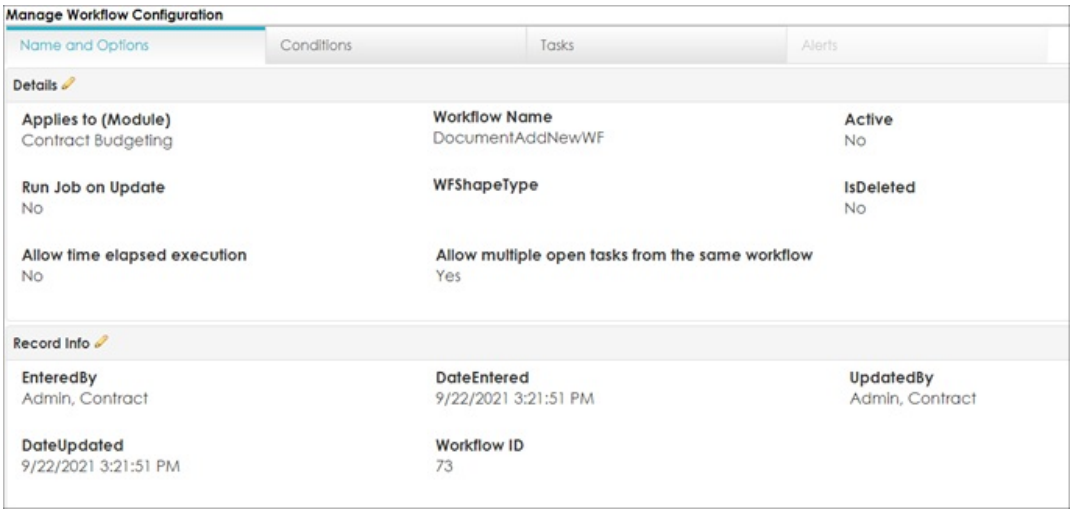
Attaching a Notification Template To a Workflow Task

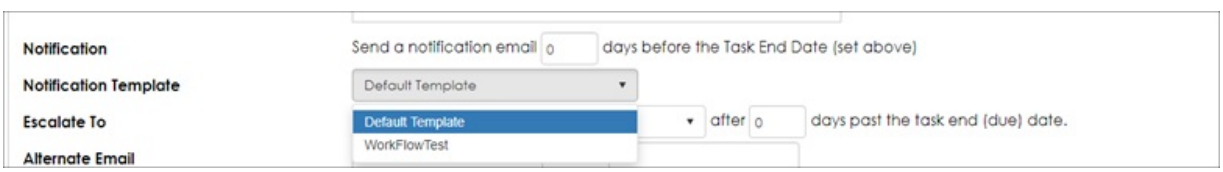
1. Navigate to the desired workflow in which the user would like to attach a notification template.

2. Click the **Tasks** ribbon.

3. Click the **Pencil & Paper Icon** to edit the task.

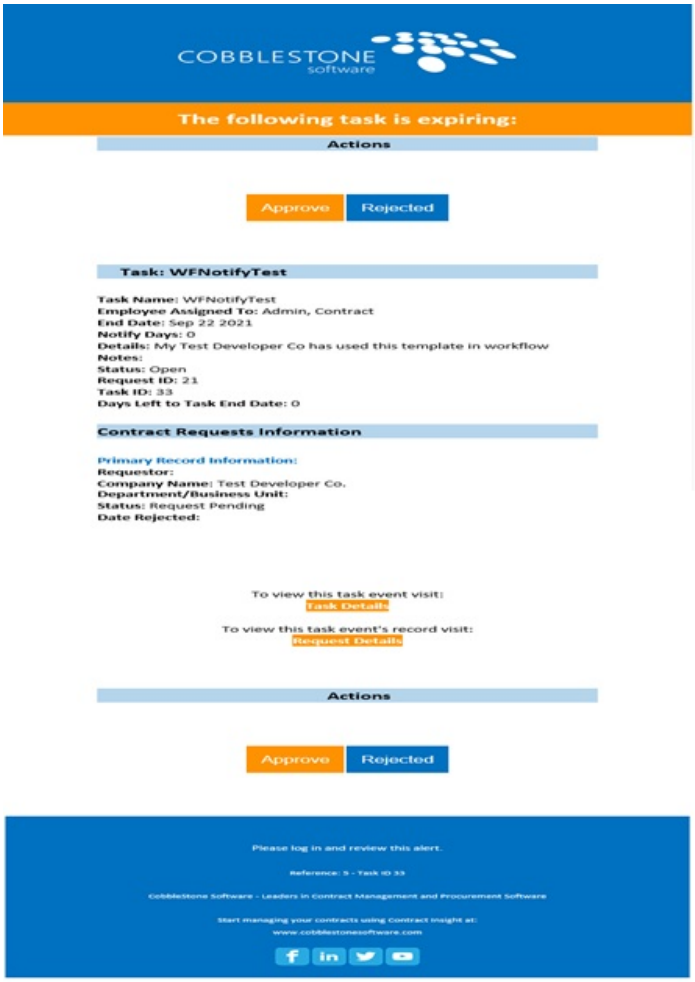
4. The task will now open. From here, click the dropdown under **Notification Template**





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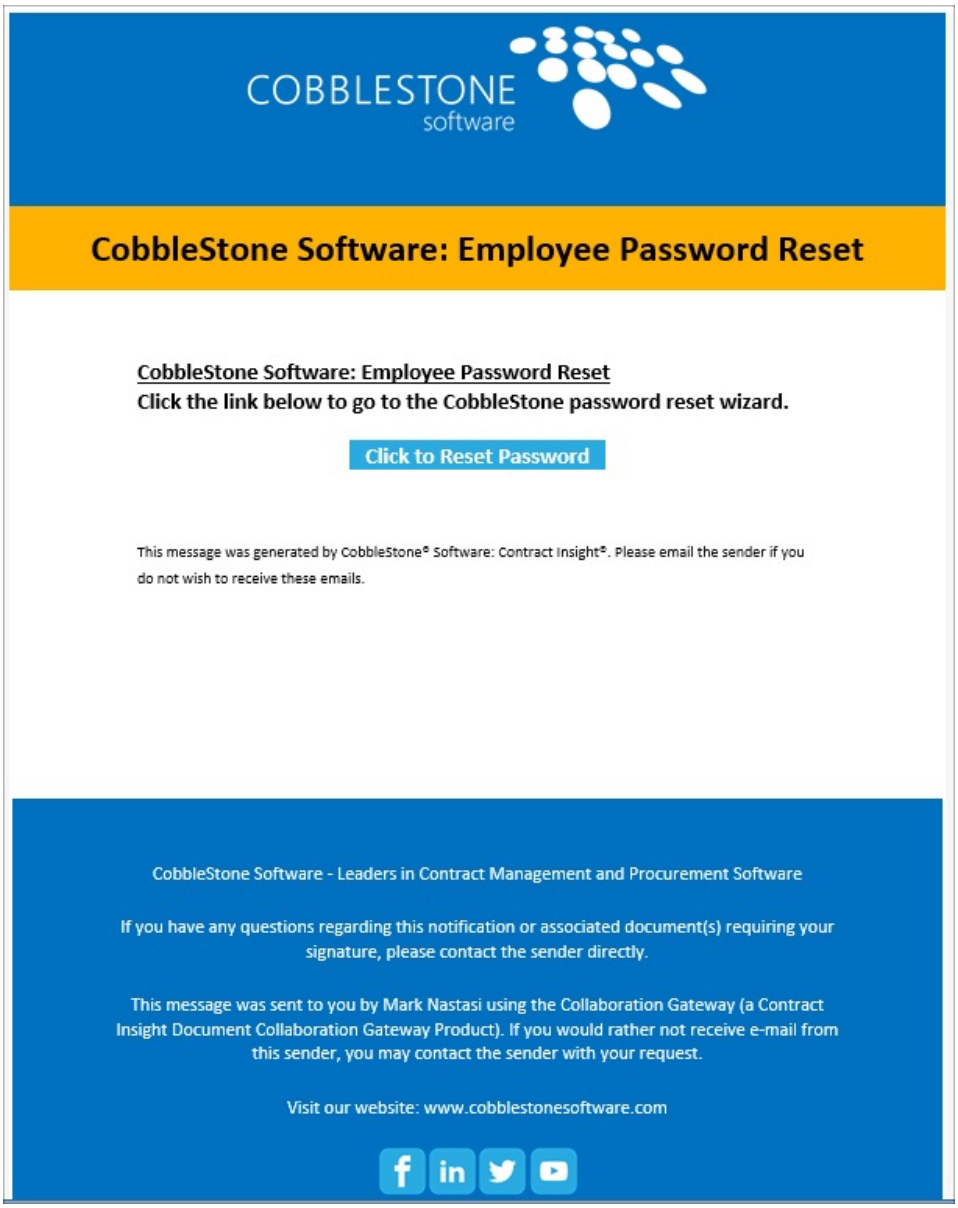
When everything is set, alerts will send out in the way in which the system administrator built them. Below is an example of a created Notification Template



The following notifications use the following design:

- Employee Password Reset
- E-Sign reminders
- Report emails
- Contract Expiration Warning
- All other non-Task emails except One off and secure emails

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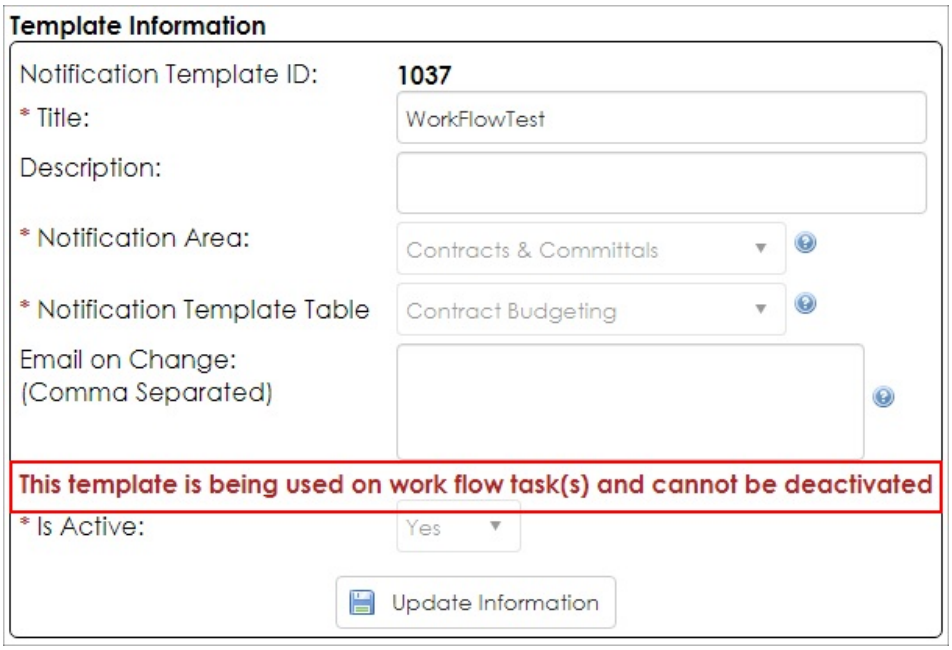
Social Media Pages on Notification Templates

On the **Template Subject/Body** page, admins may choose to show social media. As of right now, ONLY CobbleStone's social media may appear.



NOTE: If a Notification Template is being used on a workflow process, the template cannot be deleted.

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Editing a Notification Template

1. Click **Manage/Setup**

2. Click **Notification Templates**

3. Click **Notification Template List**

4. Click **Manage/Edit** next to the Template that requires editing (pictured below)



5. Make the appropriate changes and click **Save and Continue** when finished.

Deleting a Notification Template

1. Click **Manage/Setup**

2. Click **Notification Templates**

3. Click **Notification Template List**

4. Click **Delete** next to the Template that requires deletion (pictured below)



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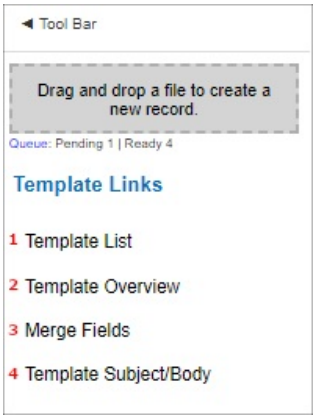
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Notification Template Side Menu

Notification Template Side Menu

Alerts & Notifications: Notification Template Side Menu

The Notification Templates side menu includes the following features, labeled 1-4, with a brief description outlining the uses of each function.



1. **Template List:** This allows a user to view the existing templates, which will help with editing and deleting if need be.

2. **Template Overview**: This allows a user to edit an existing template overview.

3. **Merge Fields:** This allows a user to select what fields may be used in merging notification(s) and/or for notification template rules.

4. **Template Subject/Body**: This creates/Updates the notification template's body content/subject.

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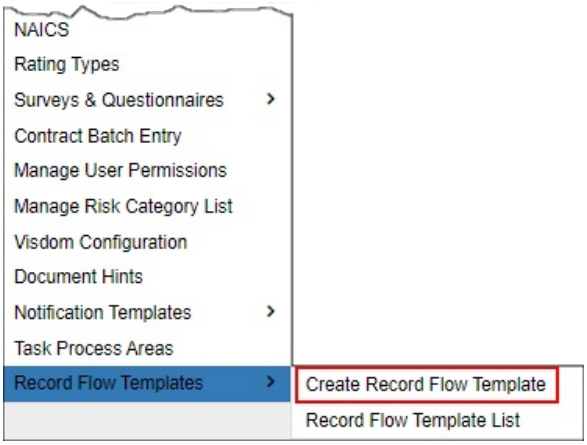
Creating Record Flow Templates

Creating Record Flow Templates

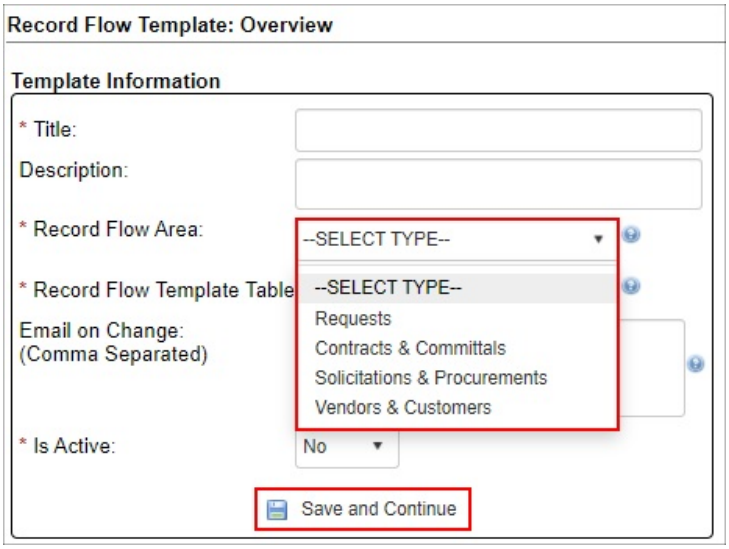
Record Flow Templates

Contract Insight has the ability to automatically create a new Request, Contract, eSourcing, or Vendor/Customer Record based on conditions met in an existing Request record.

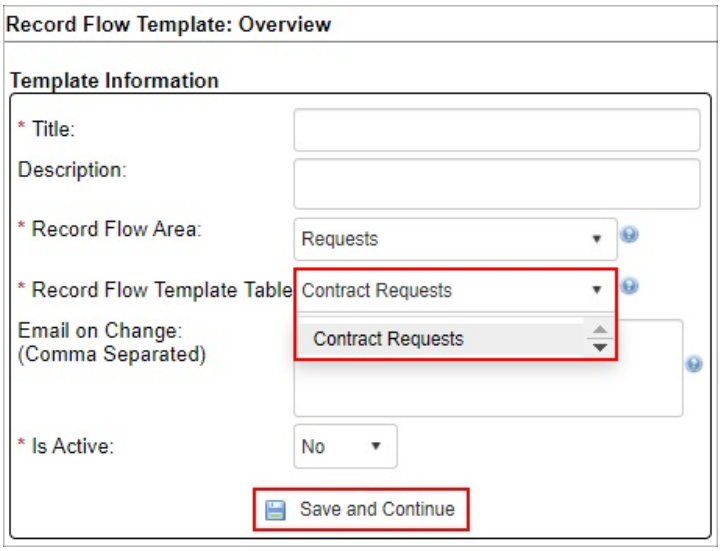
To do this, click **Manage/Setup**, **Record Flow Templates**, and **Create Record Flow Template**.



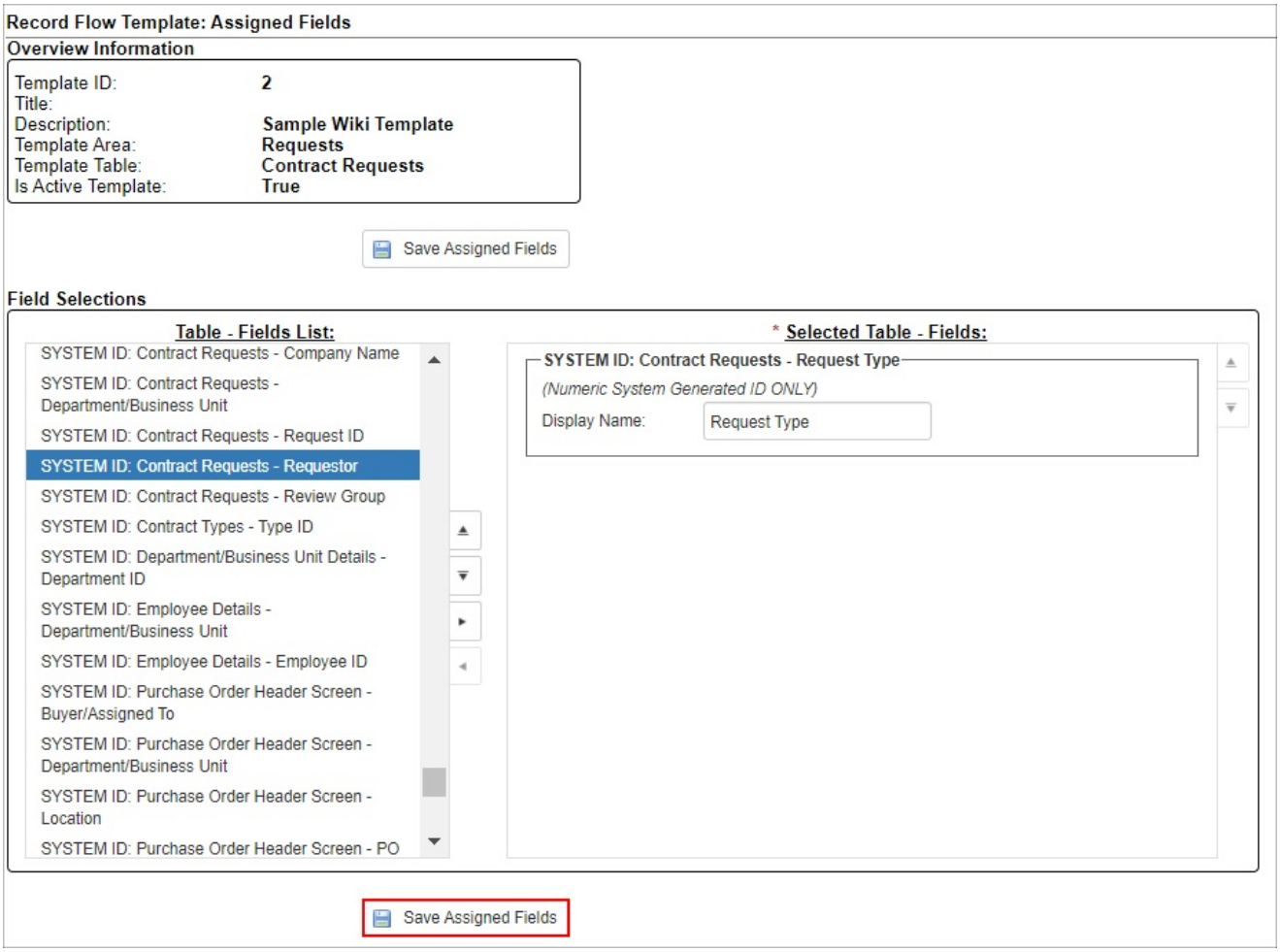
From this screen, select the Area to which the template applies, as well as the necessary Table.



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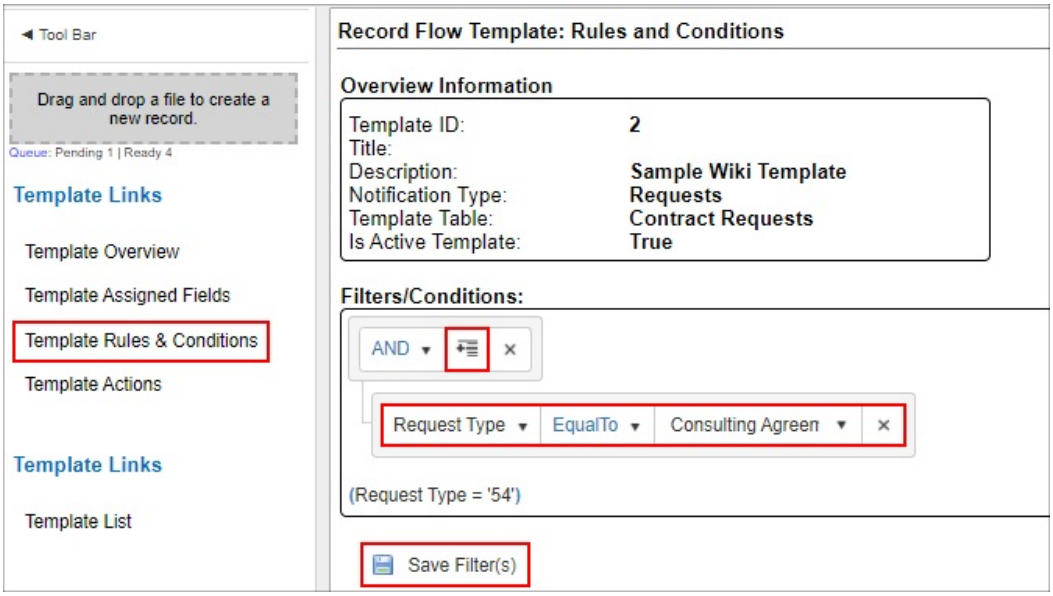


The next step will be selecting which fields will be used to filter when this action should take place. Under the Template Links side menu, click **Template Assigned Fields**. Select tables as necessary using the arrow icons to select/de-select fields. When all desired fields have been brought over, click **Save Assigned Fields**.



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Once all fields have been added and saved, under the Template Links side menu, click **Template Rules & Conditions**. Add the condition in which the new record should populate. Once finished, make sure to click **Save Filter(s)** at the bottom.



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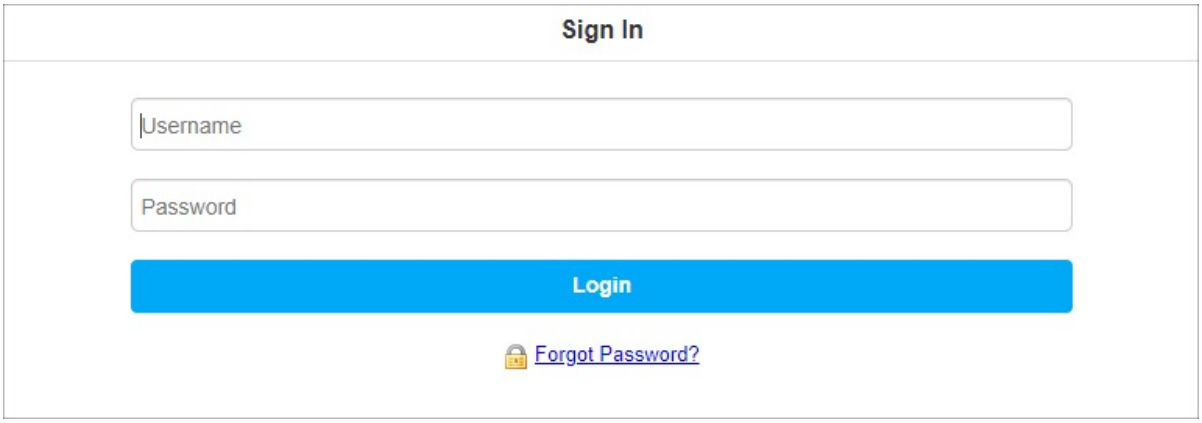
Log-in

Log-in

General Navigation: Log into Contract Insight

1. Open a web browser, connect to the Internet, and go to the URL web address site that was assigned (or obtained from the Application Administrator).

2. The **Log In** screen displays. Enter the username and password that has been assigned by the Application Administrator.



If you have forgotten your password, contact your application administrator to have it reset by clicking **Forgot Password**.
To reset your password, go to the **Employees** top navigation menu and select **Change My Password**.

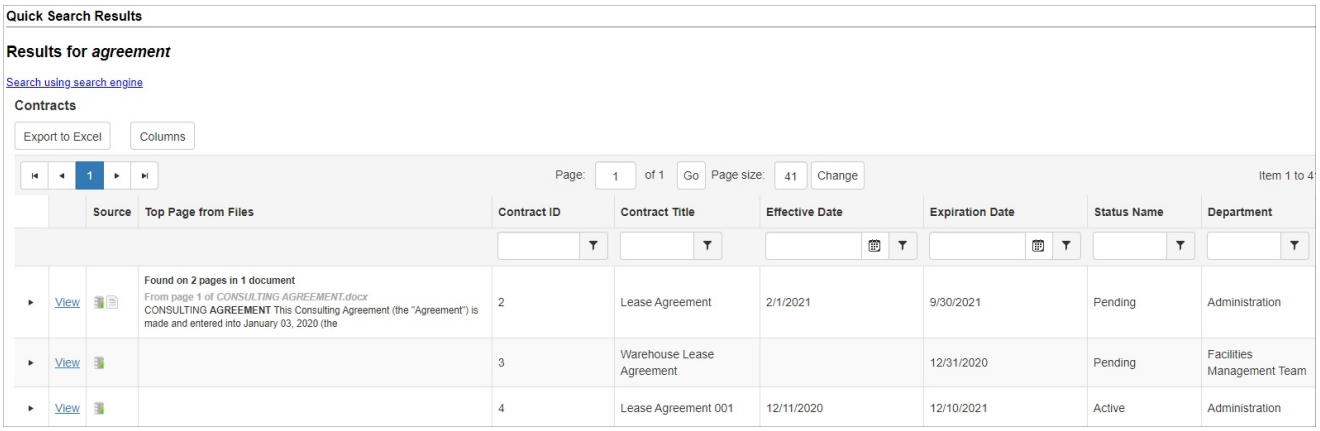
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Search Results

Search Results

General Navigation: Understanding and Navigating Search Results

Contract Insight's search results contain a wealth of information and application functionality. Gone are the days of static search results that could only show data in one dimension. In key data & result grids across the system, the features in the image below are available.



To properly utilize these grids to their fullest extent, first we will outline their different pieces of functionality:

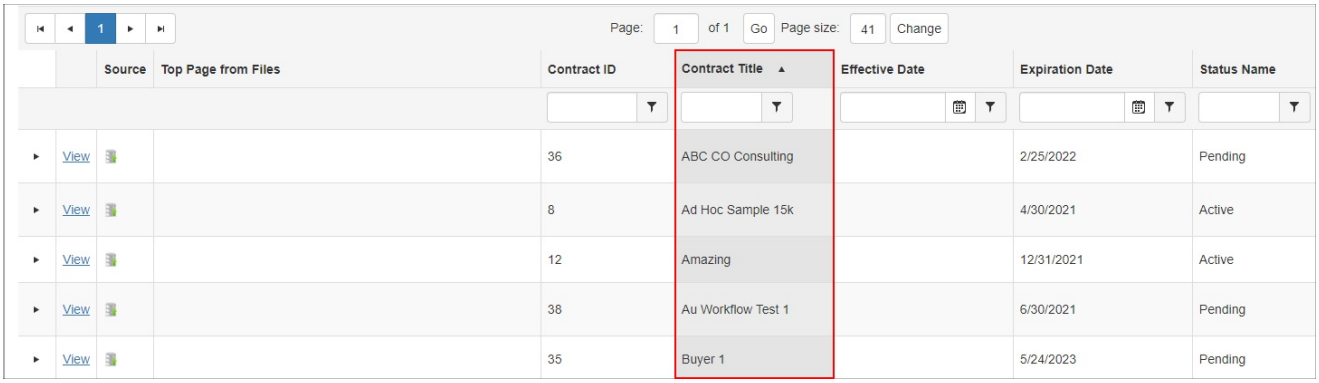
- Multiple custom sorting with just a few clicks
- Filtering on each and every column
- Drop-down results for attached files (not available on every search result)

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Multiple Custom Sorting and Filtering Data

Each of these new grids can perform custom sorting on anywhere from one column to all columns.

To perform a custom sort on a grid, click the column name by which to sort. The grid refreshes.

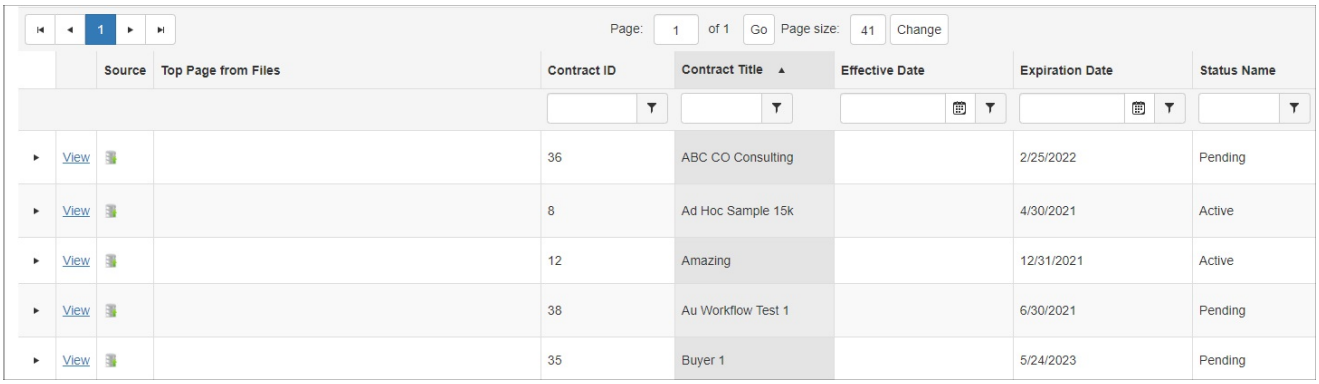


	Source	Top Page from Files	Contract ID	Contract Title ▲	Effective Date	Expiration Date	Status Name
View			36	ABC CO Consulting		2/25/2022	Pending
View			8	Ad Hoc Sample 15k		4/30/2021	Active
View			12	Amazing		12/31/2021	Active
View			38	Au Workflow Test 1		6/30/2021	Pending
View			35	Buyer 1		5/24/2023	Pending

Notice that in the example image, the column **Title/Name** is highlighted (selected) and next to the name, there is a small arrow pointing up. This shows that the grid is currently being sorted by the column **Title/Name**.

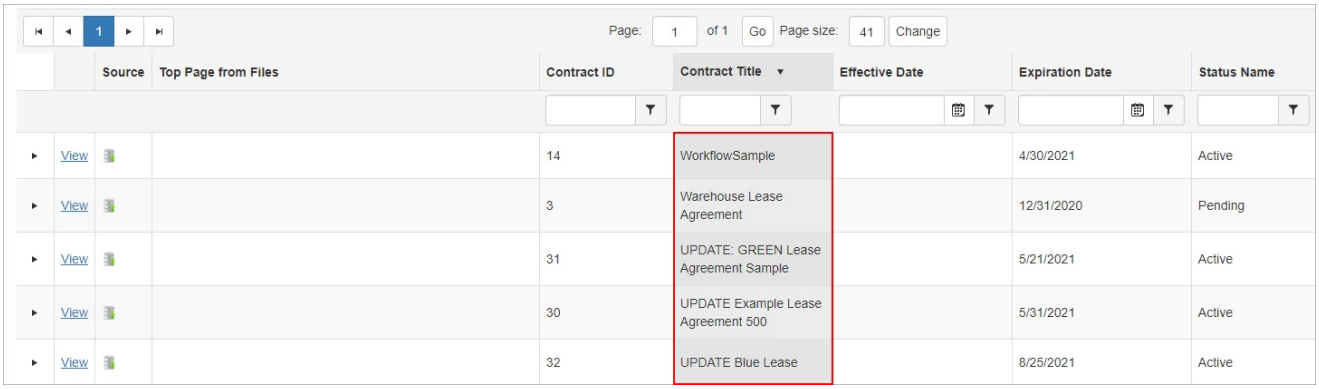
Each column can be clicked to one of three (3) different states:

The first click on a column will sort the column in **ascending order**.



	Source	Top Page from Files	Contract ID	Contract Title ▲	Effective Date	Expiration Date	Status Name
View			36	ABC CO Consulting		2/25/2022	Pending
View			8	Ad Hoc Sample 15k		4/30/2021	Active
View			12	Amazing		12/31/2021	Active
View			38	Au Workflow Test 1		6/30/2021	Pending
View			35	Buyer 1		5/24/2023	Pending

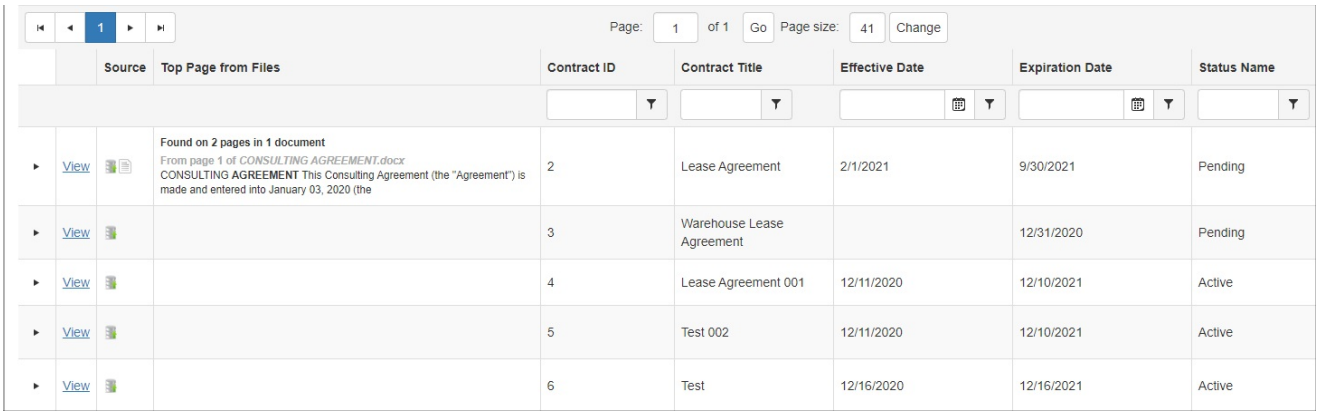
The second click on the same column will sort it in **descending order**.



	Source	Top Page from Files	Contract ID	Contract Title ▼	Effective Date	Expiration Date	Status Name
View			14	WorkflowSample		4/30/2021	Active
View			3	Warehouse Lease Agreement		12/31/2020	Pending
View			31	UPDATE: GREEN Lease Agreement Sample		5/21/2021	Active
View			30	UPDATE Example Lease Agreement 500		5/31/2021	Active
View			32	UPDATE Blue Lease		8/25/2021	Active

The third click on the same column will remove its sorting and return the list to its original state.

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	Source	Top Page from Files	Contract ID	Contract Title	Effective Date	Expiration Date	Status Name
View		Found on 2 pages in 1 document From page 1 of *CONSULTING AGREEMENT.docx* CONSULTING **AGREEMENT** This Consulting Agreement (the "Agreement") is made and entered into January 03, 2020 (the	2	Lease Agreement	2/1/2021	9/30/2021	Pending
View			3	Warehouse Lease Agreement		12/31/2020	Pending
View			4	Lease Agreement 001	12/11/2020	12/10/2021	Active
View			5	Test 002	12/11/2020	12/10/2021	Active
View			6	Test	12/16/2020	12/16/2021	Active

This process can be repeated for any columns to add to the sorting of the grid.

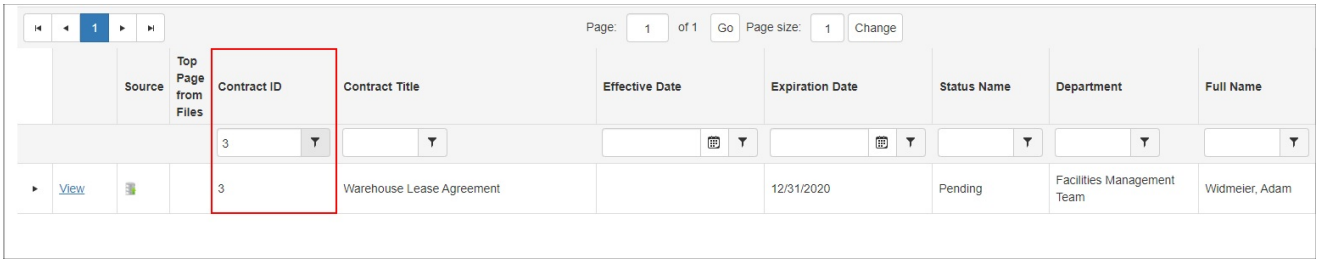
Note: The sort order of the grid is always determined by the order in which the columns are clicked. Therefore, if **Title/Name** was already clicked to be sorted in ascending order, if the **Start Date** was then clicked once, it would sort in ascending order as well, however, it would be the second sort for the grid. The grid would first sort by **Title/Name**, then for any results with the same **Title/Name**, it would sort those according to their **Start Date**.

Multiple Custom Filtering

Each of these new grids can perform custom filtering on any of the columns in the grid.

To perform a custom filter on a grid, click the text box underneath the column name by which you wish to filter the grid. Depending on the type of column selected, the grid can be filtered in different ways.

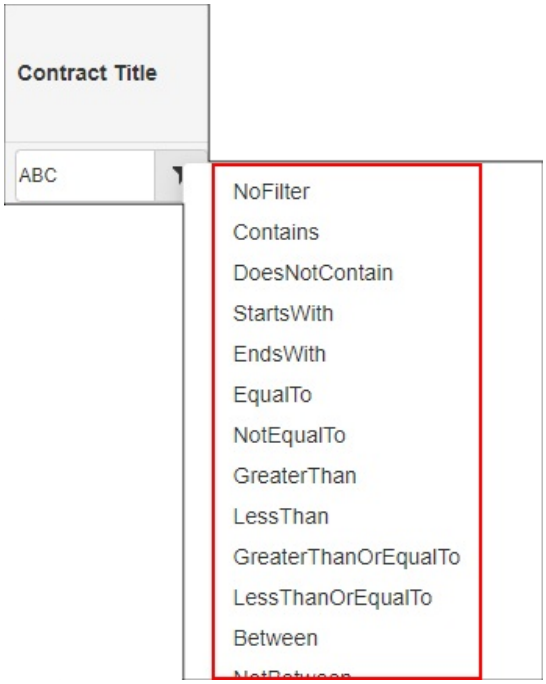
Primary ID: To filter by a primary ID, all that is needed is to type in the ID number by which to filter on select **Equal To** from the **filter** icon's menu.



	Source	Top Page from Files	Contract ID	Contract Title	Effective Date	Expiration Date	Status Name	Department	Full Name
			3						
View			3	Warehouse Lease Agreement		12/31/2020	Pending	Facilities Management Team	Widmeier, Adam

Text Column: To filter by a text column, select the text box underneath the column's name, and type in a word or phrase by which to filter the grid (**Note:** it does not have to be a full word). Once done, click the **filter** icon next to the text box as shown.

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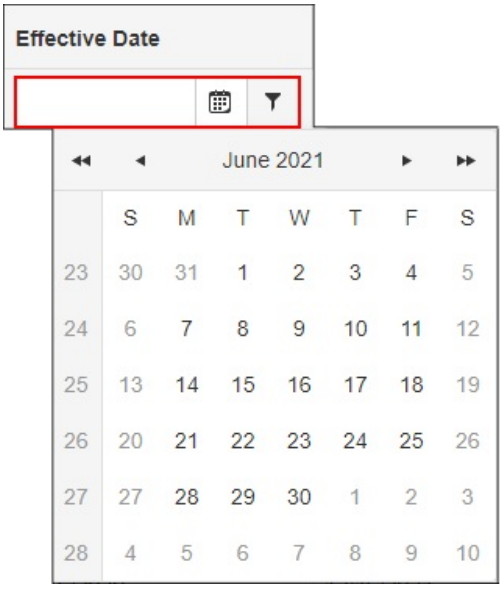
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A list of all the possible filter types for the column displays. If the exact word or phrase by which to search, select **Equal To**. The grid's results then filter to only those records who are exactly equal to what was typed in (based on the criteria selected).

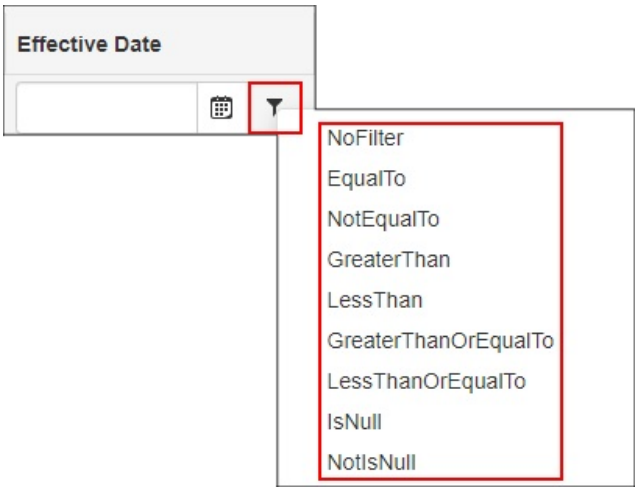
For instances when the exact word is unknown, there are filters for **Contains/DoesNotContain** (These will look to see if each record contains the text provided anywhere in that column); as well as filters for **StartsWith/EndsWith** for checking if the column for each record starts with or ends with the string provided.

To clear a Text column filter, click the **filter** icon underneath the column name and select **No Filter** at the top of the list.

Date Column: To filter by a date column, click the **calendar icon** underneath the column name to select a date or click the text box to the left of it to type in a date manually.



Once a date has been selected, click the **filter** icon next to the calendar icon to specify how to filter the date column.

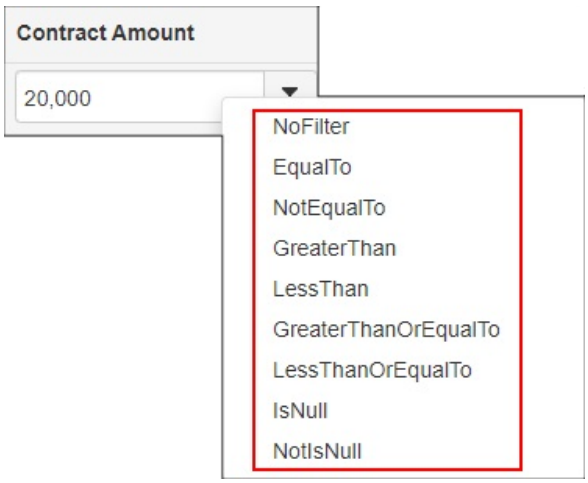


To clear a Date column filter, click the **filter** icon underneath the column name and select **No Filter** at the top of the list.

Currency/Decimal/Number Column: To filter a number based column, click the text box below the column name and provide the

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number or decimal to filter by (**Note:** If currency, do not provide the currency symbol, just the amount).



Once a number based value has been provided, click the **filter** icon next to the text box to specify how to filter the number based column.

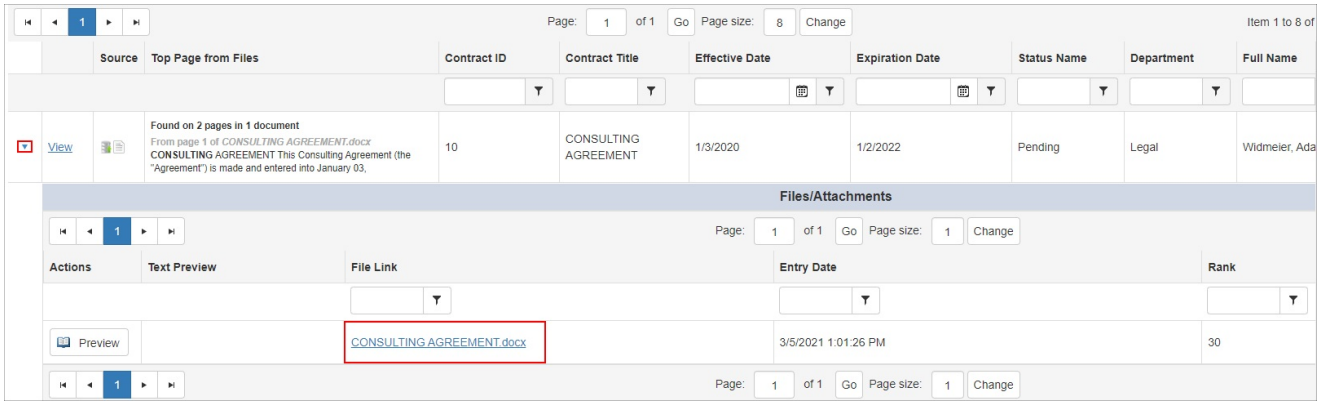
To clear a Number based column, click the **filter** icon underneath the column name and select **NoFilter** at the top of the list.

The grid can be filtered by as many of the columns as needed, however when multiple columns are provided with a filter, the grid will always check to find those results that match each and every one of the filters provided.

Drop-down results for attached files

The Contract related grids contain the additional functionality to view all their attached files in-line within the grid.

To view these files for a result within the grid, click the **left-hand arrow** on that row. This will populate the list of attached files for that record (if any).



When viewing these files, click the file name to directly open up the file or check the columns to the right to see any provided description about the file and the date it was attached to the record.

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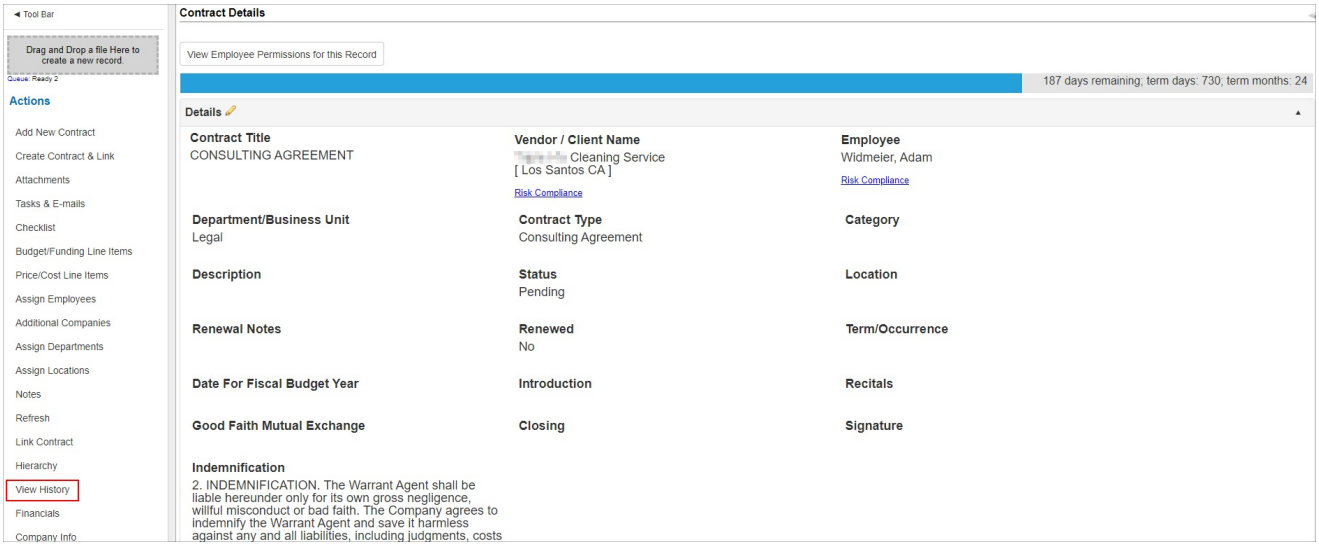
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Audit Log

Audit Log

How to Access the Audit Log

The audit log can be accessed through the **View History** option on many screens within Contract Insight. An example of what this button looks like and where it can be found is shown below.

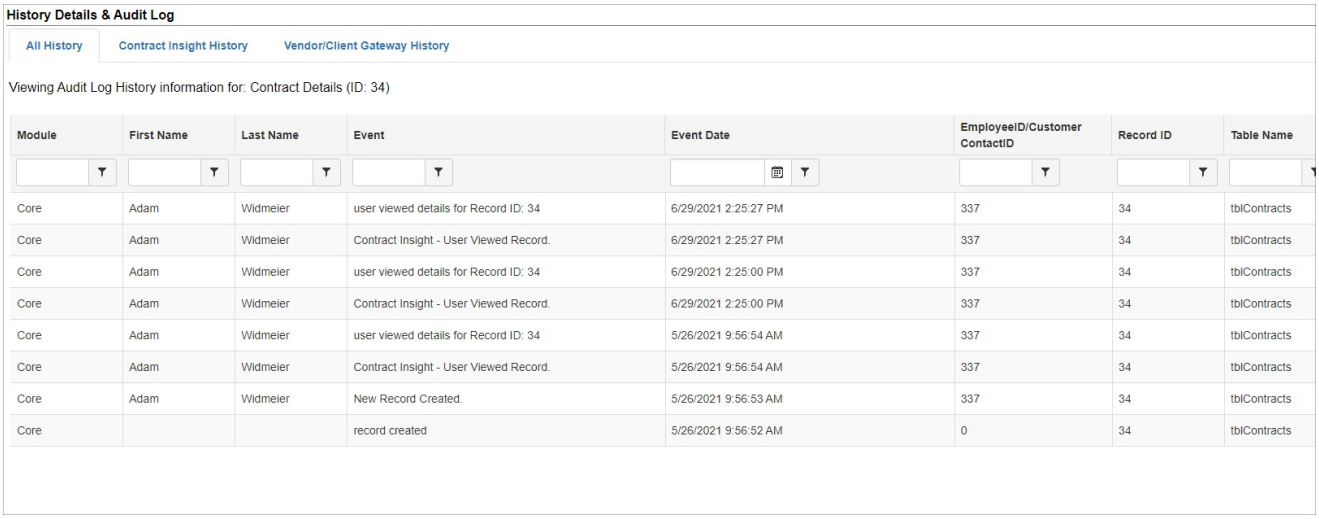


Contract Insight provides an **Audit Log** tool which allows users to monitor; review; and track events, actions, and changes made on many screens within Contract Insight against each record, such as a Contract Record, an Employee Record, a Department/Division list value, etc. as well as the Employee who performed the action and the specifics for the action that took place (such as the original value and the updated value for a field that was changed).

Understanding the Audit Log Screen

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The Audit Log screen provides the ability to monitor and review any actions on or changes made to the specific screen (**record**) you are viewing. As shown below, the Audit Log captures who performed the activity (**First and Last Name**), what change was made/action taken (**Event**), the specific date and time the event took place (**Event Date**), as well as the acting employee's ID (**Employee ID**), the record this specific Audit Log is for (**Rec ID**), and which to table this record belongs (**Table Name**).


History Details & Audit Log

All History | Contract Insight History | Vendor/Client Gateway History

Viewing Audit Log History information for: Contract Details (ID: 34)

Module	First Name	Last Name	Event	Event Date	EmployeeID/Customer ContactID	Record ID	Table Name
Core	Adam	Widmeier	user viewed details for Record ID: 34	6/29/2021 2:25:27 PM	337	34	tblContracts
Core	Adam	Widmeier	Contract Insight - User Viewed Record.	6/29/2021 2:25:27 PM	337	34	tblContracts
Core	Adam	Widmeier	user viewed details for Record ID: 34	6/29/2021 2:25:00 PM	337	34	tblContracts
Core	Adam	Widmeier	Contract Insight - User Viewed Record.	6/29/2021 2:25:00 PM	337	34	tblContracts
Core	Adam	Widmeier	user viewed details for Record ID: 34	5/26/2021 9:56:54 AM	337	34	tblContracts
Core	Adam	Widmeier	Contract Insight - User Viewed Record.	5/26/2021 9:56:54 AM	337	34	tblContracts
Core	Adam	Widmeier	New Record Created.	5/26/2021 9:56:53 AM	337	34	tblContracts
Core			record created	5/26/2021 9:56:52 AM	0	34	tblContracts

Additional functionality includes the ability to export this Audit Log Table to Excel for any further modifications or tracking that needs to be done (using the excel worksheet). This is accomplished by clicking **Export to Excel** on the side menu under **Actions**.

What screens have the View History link/Audit Log?

The following screens have **View History/Audit Log** functionality available:

1. Contract Details screen

Any Additions/Views/Edits Made to the following Contract Details sections/screens:

   a. Contract Files/Attachments
   b. Task Details
   c. Price/Cost Details
   d. Checklists/Milestones
   e. Basic Templates
   f. Financials Tracking
   g. Linking of Contract Records
   h. Assigning Additional:
      i. Employees
      ii. Vendors/Companies
      iii. Departments
      iv. Locations
   i. Notes Repository (Notes, Comments, Diary Log)
   j. Copying of Contract Record
   k. Emails sent from Contract Record
   l. User-Defined Sub-tables

2. Vendor/Company Details screen

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Any Additions/Views/Edits Made to the following Company Details sections/screens:

a. Files, Documents, Attachments
    i. Viewing, Adding, Deleting
b. Company Contacts Repository
    ii. Adding, Editing, Deleting Contact Record
c. Linking of Company Details Records
d. Notes Repository
e. Viewing of Contract(s)
f. vCard Export
g. Printing of Company Details screens

3. Employee Details screen

Any Additions/Views/Edits Made to the following Employee Details sections/screens:

a. Files, Documents, Attachments
    i. Adding, Viewing, Deleting
b. Security Group assignments/changes

4. Departments/Divisions List
5. Locations List
6. Contract Types List
7. Categories List
8. Occurrences List
9. Contract Statuses List
10. Clauses Table
11. Workflow Manager
12. Field Manager
    a. Manage Fields (for all tables)
    b. Assign/Manage Fields by Contract Type

For Optional Add-On Modules (if your organization has additionally purchased one of the below Modules):

1. Solicitation Details screen
2. Document Authoring & Creation
   Logging of any and all changes/additions/updates to all sections and templates
3. Vendor/Client Gateway
   Logging of Gateway actions by Vendors/Clients who have logged in
4. Purchase Order Management
    a. PO Details Screen
    b. PO Details on a Contract Record
    c. PO Template

Note: As with all other tables within Contract Insight, reports may be run on the Audit Log table using Ad-Hoc Reports/Searches.

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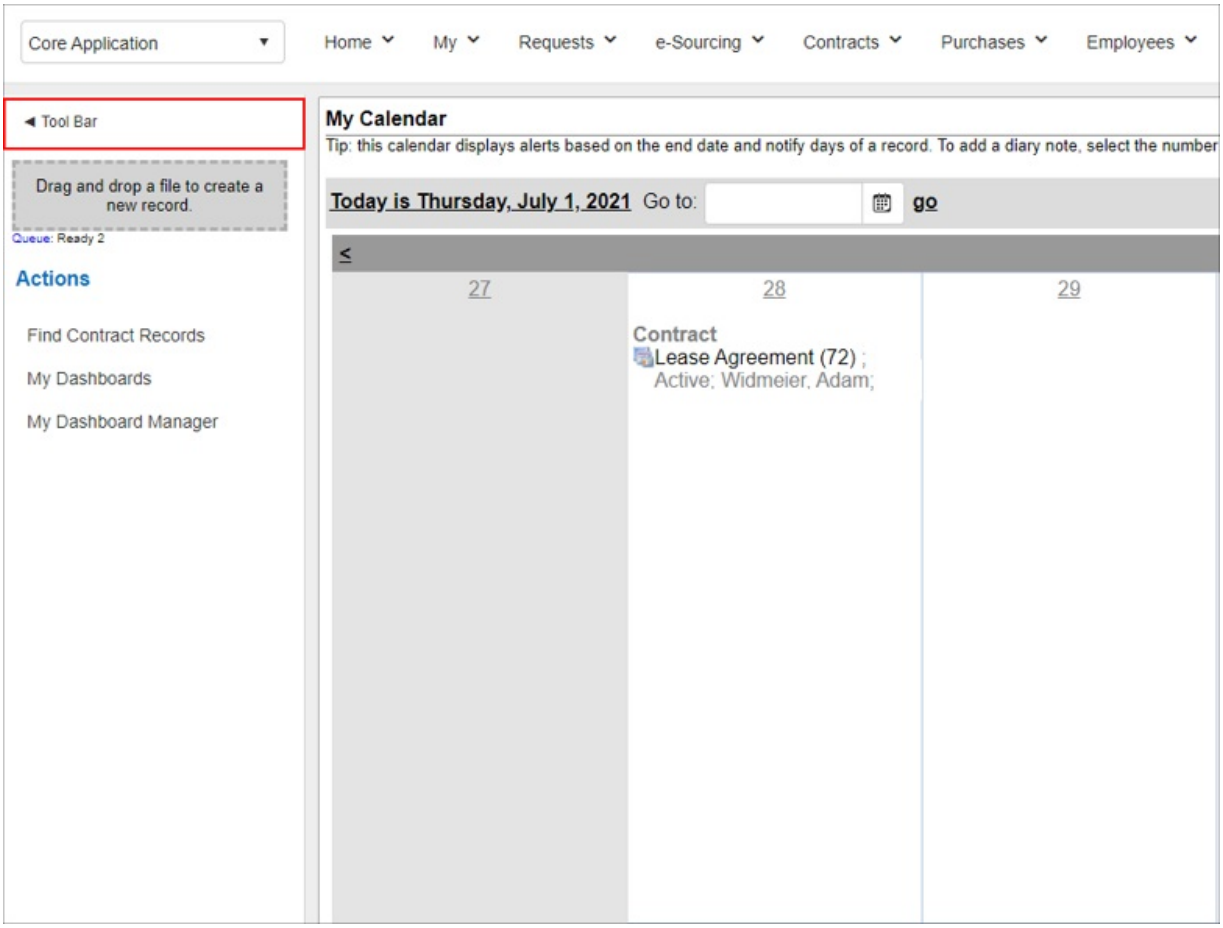
Side Menu Show/Hide

Side Menu Show/Hide

General Navigation: Side Menu Show/Hide

While using Contract Insight, numerous options, differing from area to area, are available on the side menu. To allow use of more of the screen for content, the side menu is collapsible.

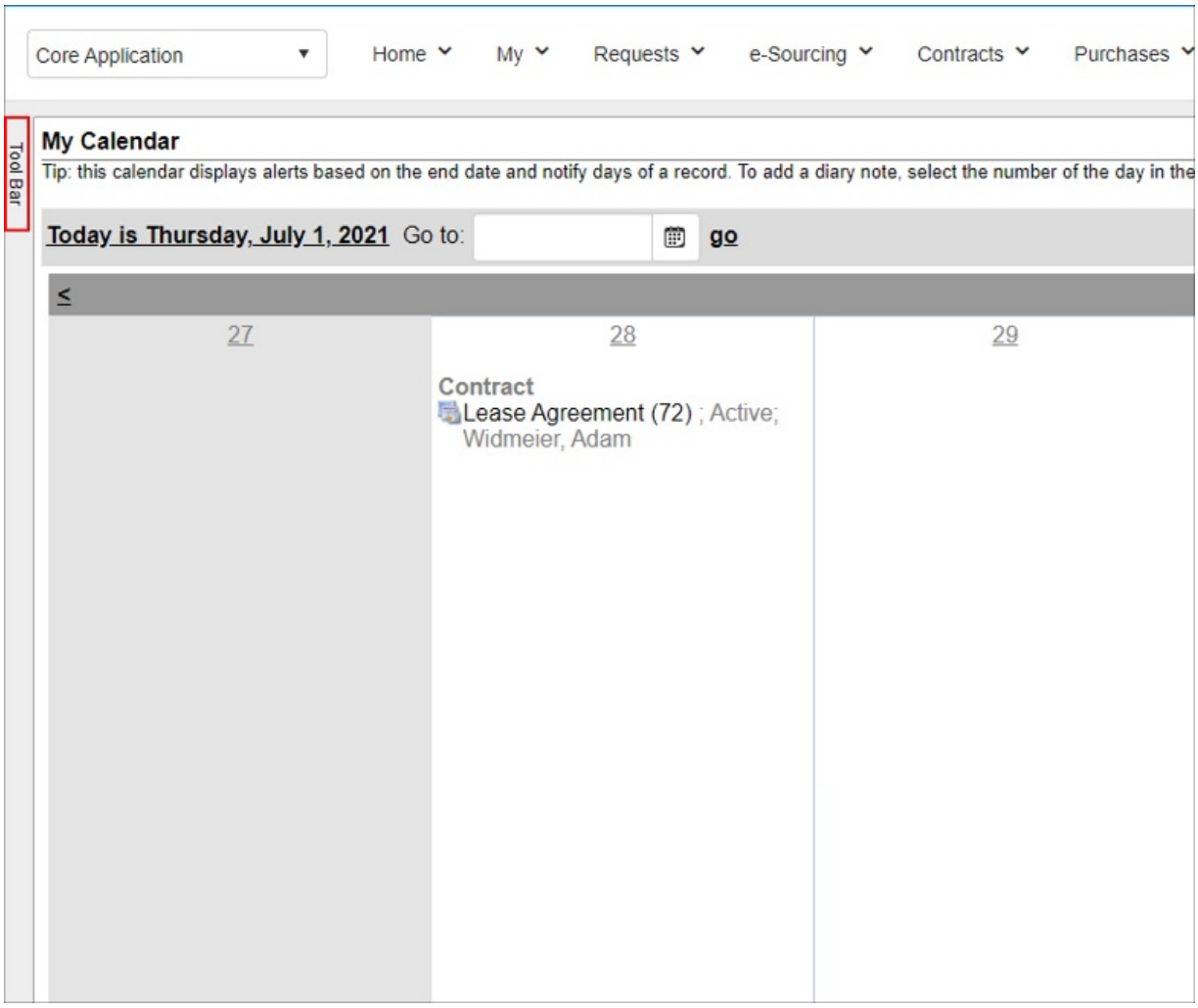
At the top of the side menu, click **Toolbar**.



The side menu collapses.

To expand the side menu, click **Toolbar** again.

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For pages with no content on the side menu, the side menu is collapsed automatically.

Note: User selected collapse or open overrides this position.

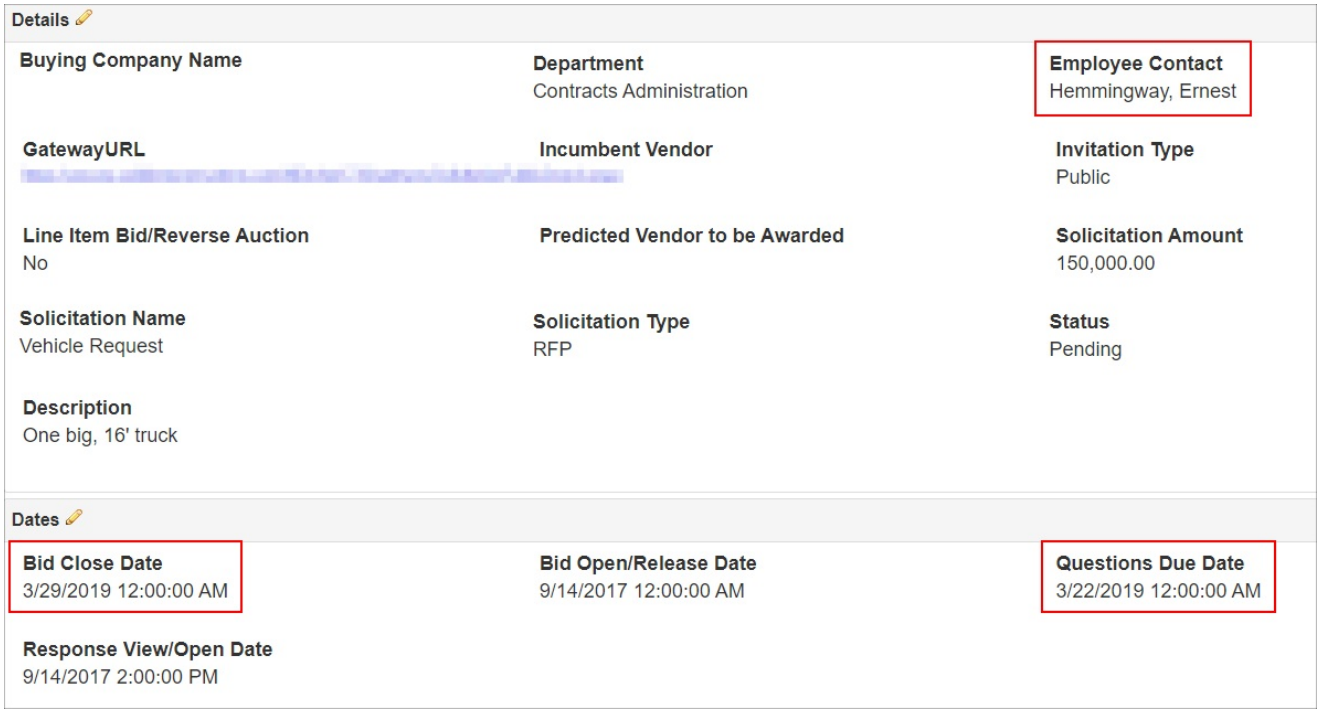
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Solicitation Record Alerts

Solicitation Record Alerts

Solicitation Record Alerts

Solicitation Record Alerts are sent out to the **Employee Contact** specified on the Solicitation Record based on the **Solicitation Close Date** and **Questions Due Date.**



The system will also display the alert on the **Calendar** screen for the **Employee Contact** for both the **Solicitation Close Date** and **Questions Due Date** fields.

Note: For the e-mails to be routed successfully please have an Application Administrator Technician verify the following:

1. The employee's e-mail address is correct in the Employee Manager Screen.

2. The **task end date** and/or **notify days** (less than the task end date) is future dated.

3. Your organization's internal e-mail system is not blocking e-mails from the cobblestonesystems.com domain (or blocking emails from the internal server).

4. The task e-mailer job is properly configured and scheduled to run at least daily (or better).

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Task Alerts on a Solicitation Record

Task Alerts on a Solicitation Record

Task Alerts on a Solicitation Record

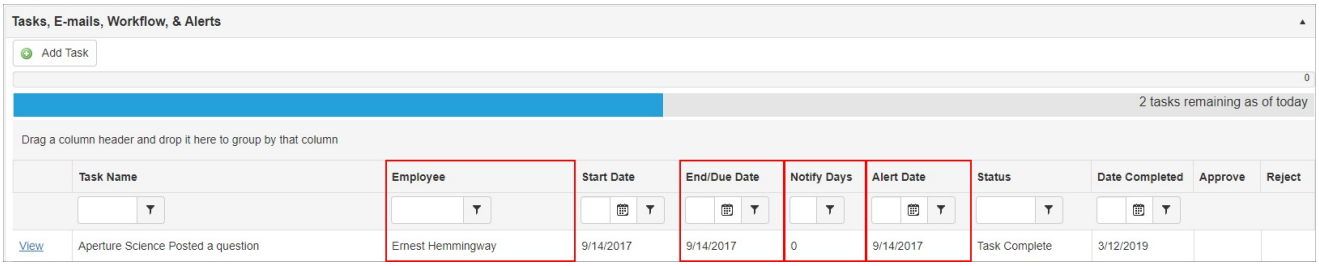
Contract Insight allows users task alerts related to Solicitation Records using the **Tasks, E-mails, & Alerts** section of the respective **Solicitation Details** screen. Solicitation Task Alerts are sent out to the **Assigned To** employee for the task record based on the:

- Task End Date
- When the number of calendar days before the **Task End Date** are equal to the **Notify Days** entered in the task record.

Example: If a user enters a task **End Date** of 5/7/2018 and a **Notify Days** value of ninety (90), the system will e-mail the **Assigned To** employee for the task record on 2/6/2018 (5/7/2018 minus 90 days).

The system will also display the alert on the **Calendar** screen for the **Assigned To** employee on 5/7/2018 (**End Date**) and 2/6/2018 (90 days before the **End Date**).

- A user may add an unlimited number of tasks for a solicitation and assign the task to any employee entered into the **Employee List** screen.



- Solicitation Tasks may alert more than one employee, escalate if needed, and repeat on an interval.

Note: Pre-defined Workflow may automatically assign tasks to a solicitation record as configured by an Application Administrator. The operations for the e-mail alerts and calendar alerts remain consistent with the instructions above, provided the Task Record has a valid **Assigned To** employee, **Task End Date**, and **Notify Days** assigned.

Note: For the e-mails to be routed successfully please have an Application Administrator verify that:

1. The employee's e-mail address is correct in the **Employee Manager** screen.
2. The **task end date** and/or **notify days** (less than the **task end date**) is future dated.
3. Your organization's internal e-mail system is not blocking e-mails from the cobblestonesystems.com domain (or blocking emails from the internal server).
4. The task e-mailer job is properly configured and scheduled to run at least daily (or better).

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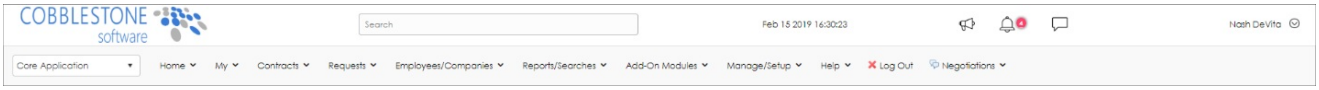
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Header Overview

Header Overview

Contract Insight Header

The top most portion of each screen in Contract Insight is the header. Core functions are available in this header to ensure they are available no matter when in the system a user navigates.



Quick Search

The Quick Search box is in the header so, even if the tool bar is collapsed, it is always available. Type a search string into the Quick Search box and press **Enter** , Click the **Magnifying Glass Icon**, or click outside of the box.



Quick Search: Spell Check

When possible, Quick Search looks for entries that may have been intended and suggests an alternate spelling or word.



Click the suggestion to perform a search on that instead.



Date & Time

The date and time displaying in the header reflects the last time a page was loaded by the current user.



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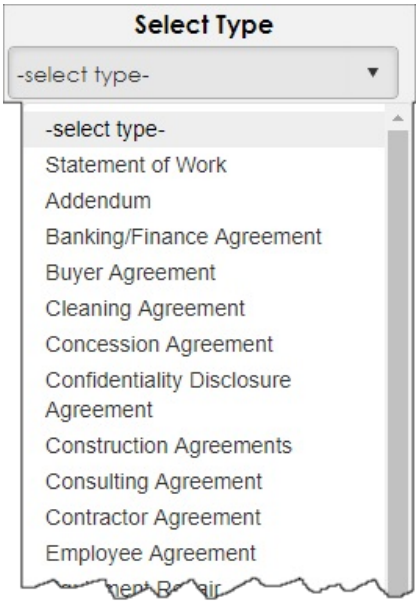
Icons

The icons at the top allow access to the in-application Notifications, Alerts, and Chat features. See each feature's page for more information on each.



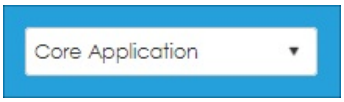
Name

The name at the top right shows the name of the currently logged in user. By clicking the carat next to the name, a menu for personal items and logout appear.



Work Spaces

If multiple Work Spaces are available to you, select the active Work Space via the pick list.



Top Menu

The top menu holds navigation options for various areas of the system.



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If working on a lower resolution or smaller display, items to the right are folded into their own menu.



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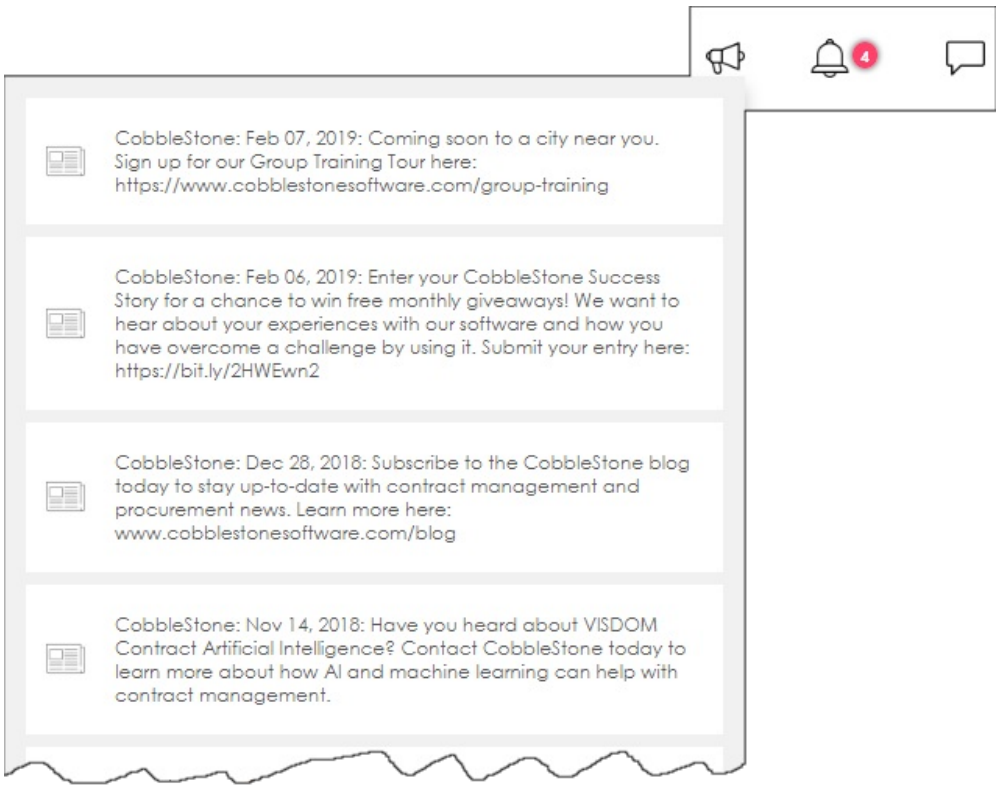
News Items

News Items

In Application News

The bullhorn Icon contains CobbleStone's and your organization's news items.





1. Click the Bullhorn to view active news items.

2. Click the Bullhorn Icon to close the pop-up window.

If your organization has disabled the news feed, the icon does not appear.



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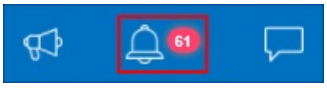
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Notifications

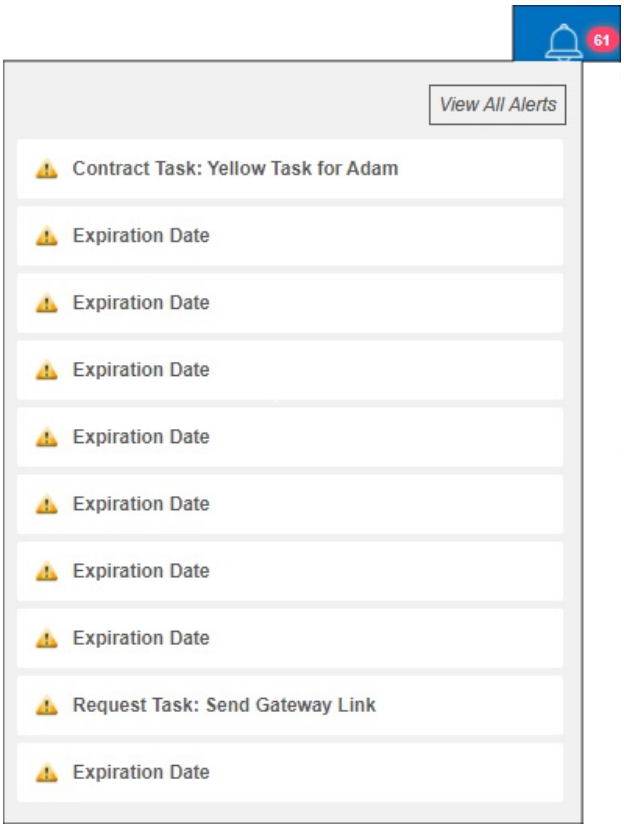
Notifications

In Application Notifications

As an alternative to or in addition to the Calendar, the **Bell Icon** in the header menu keeps a count of unread system notifications (expiration, task, etc.).



1. Click the Bell Icon to review unread system notifications. A list of all unread notifications, a number equal to that in the red circle, displays.



2. Click a line item to view the record or task page.

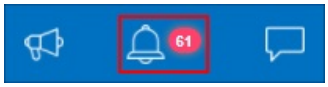
3. Click the Bell Icon to close the pop-up window.

View All Notifications

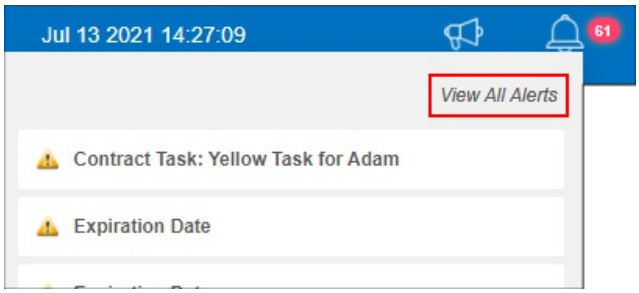
You can also view and clear all notifications at one time.

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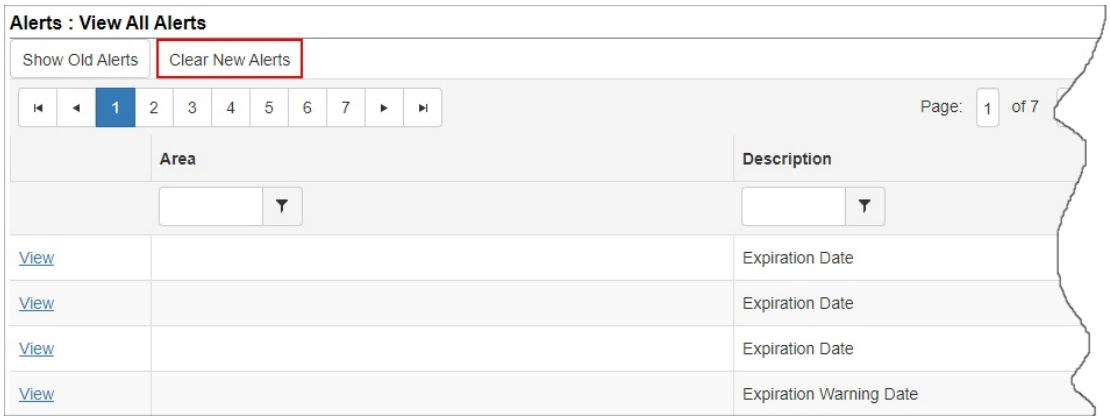
1. Click the bell icon in the menu bar



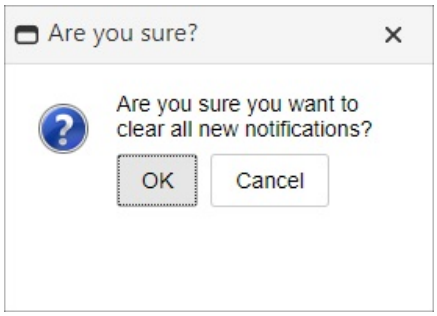
2. In the notifications menu, click View All Alerts



3. View each individual alert or click on Clear New Alerts in the side menu

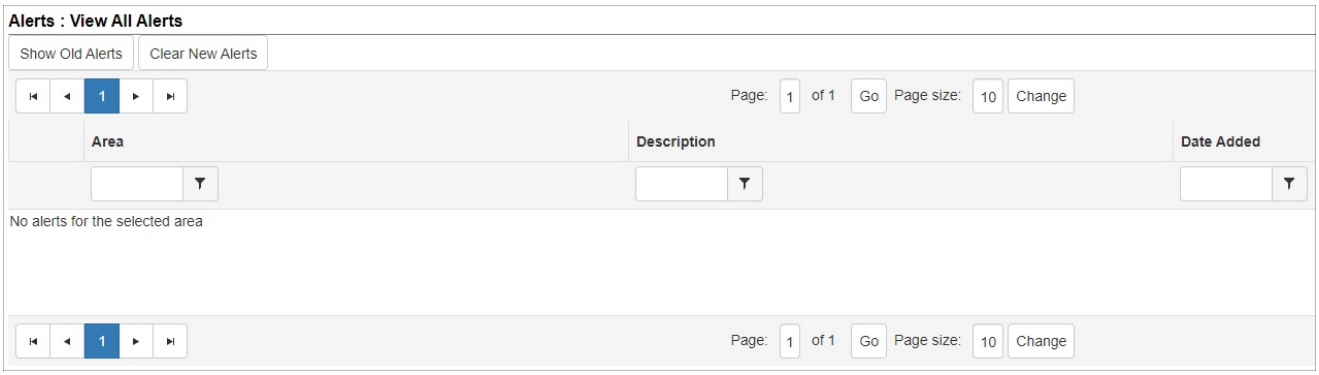


4. Confirm you would like to clear all notifications

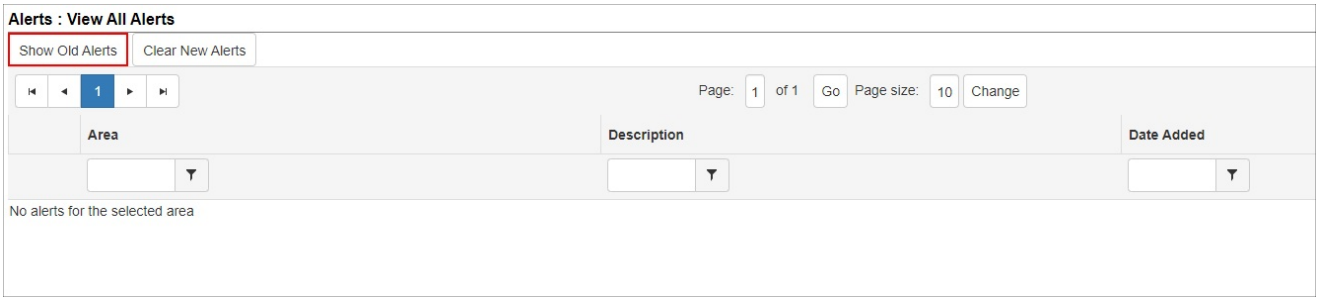


5. The Alerts Dashboard will refresh with all notifications removed

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6. To view all cleared notifications, click on the Show Old Alerts button

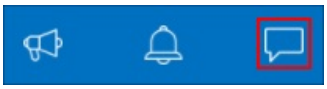


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Chat

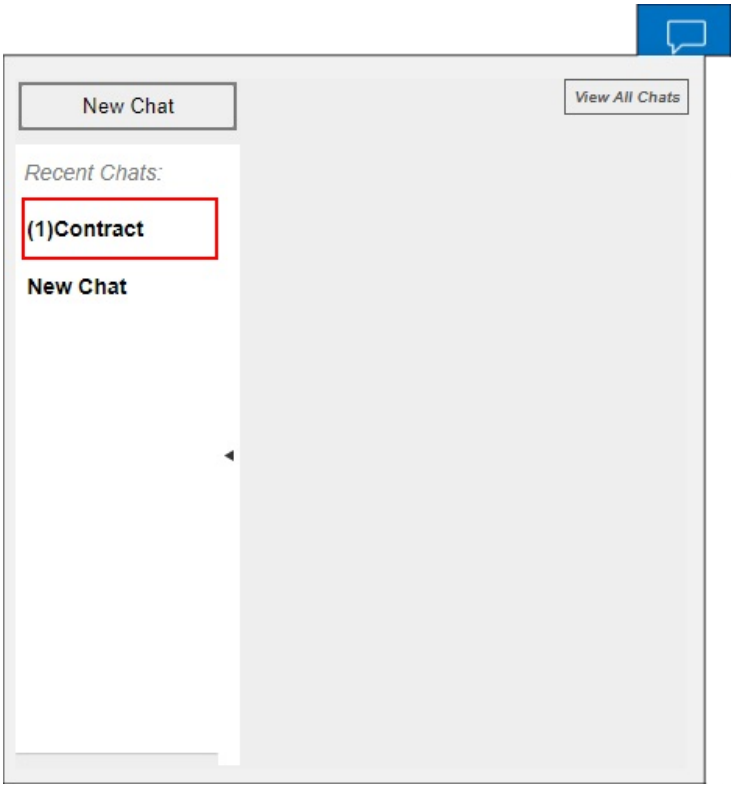
In Application Chat

The Speech Bubble Icon contains CobbleStone's in application Chat feature. It permits a fast and easy means of communication with other users and keeps track of unread messages.



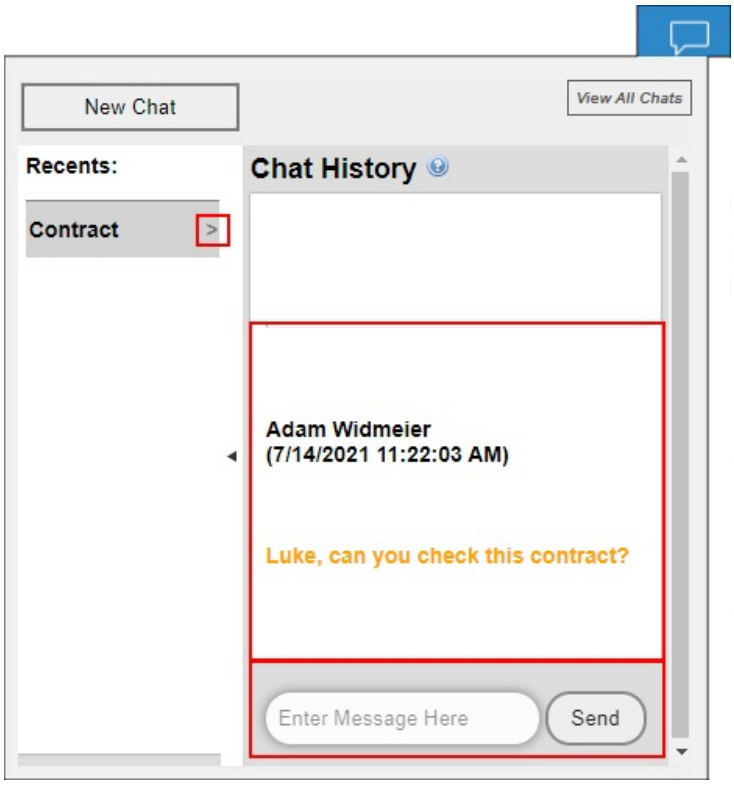
Viewing and Replying to a Chat Message

1. Click the Speech Bubble Icon to see a list of all new and recent chat threads.



2. Any new/unread messages appear at the top and have the number of unread messages listed next to the name. Click the name of the chat thread to open it.

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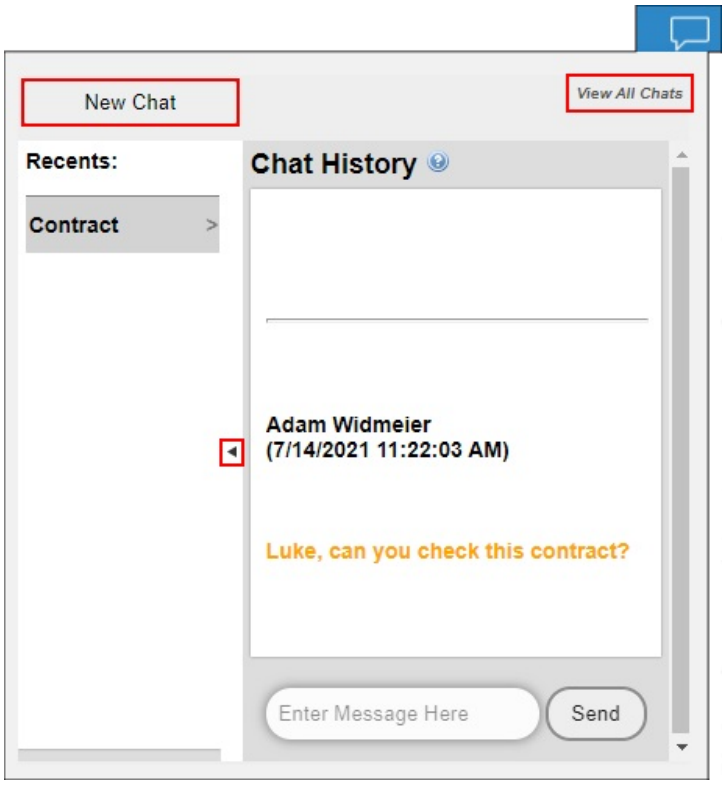
3. An arrow appears next to the name of the open chat. The name of the sender, the date, time, and message itself appear in the main portion of the window. Type a reply into the **Enter Message Here** box at the bottom.

4. When the new message is complete, click **Send**.

5. Click the carat in the middle to collapse the message list and expand the message window.

6. Click the Speech Bubble Icon to close the pop-up window.

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Sending a New Chat Message

1. Click **New Chat**.

2. In the new window, enter:

- The Chat Name
- The name(s) of the recipient(s)
- The Chat message itself



3. Click **Create**.

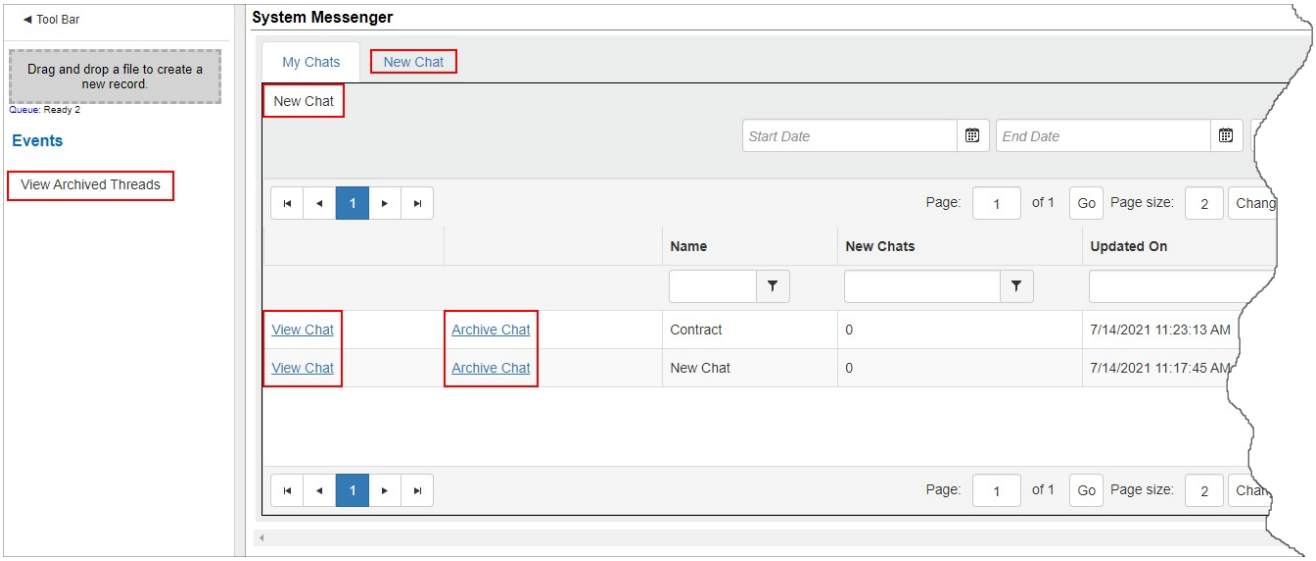
4. The new Chat Thread displays in the main portion of the window and the new thread's name appears in the list on the left.

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View All Chats

1. If the window is not to your liking, click **View All Chats** to open a new page.

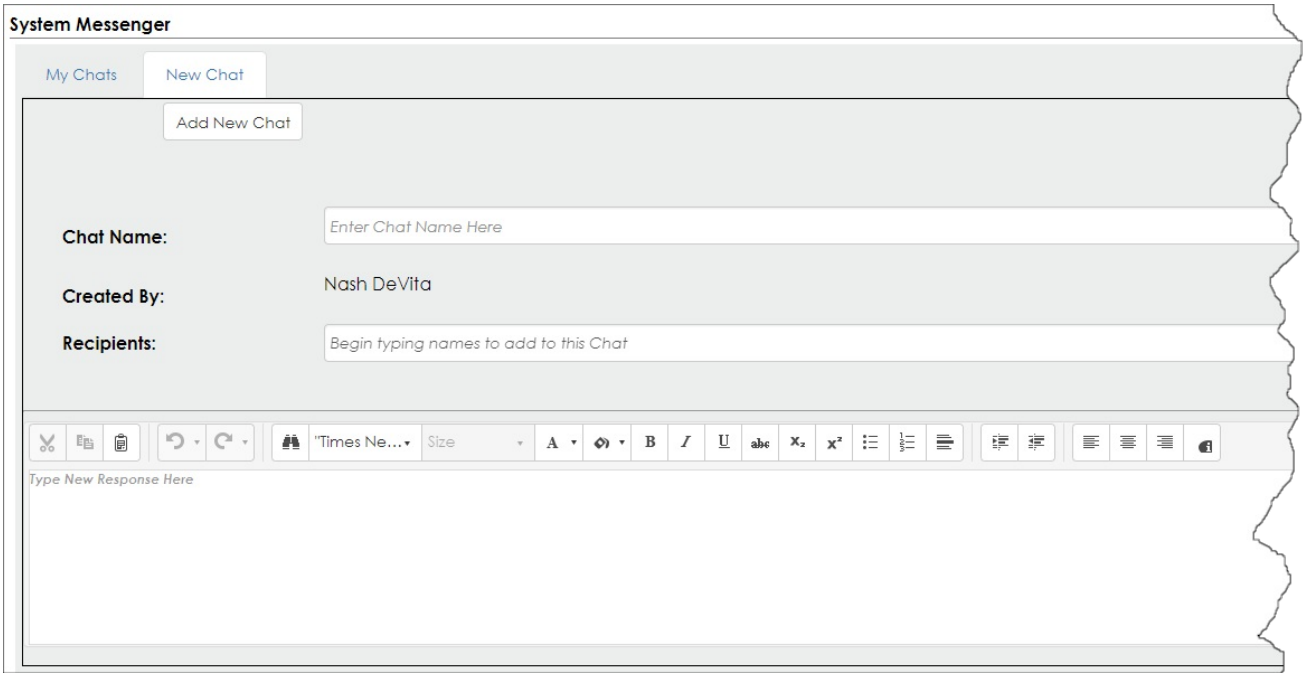
2. The System Messenger page displays. View an existing Chat Thread by clicking the line item's **View Chat**.



3. Click **Archive Chat** to store a Chat Thread in the archive and remove it from the recent thread list.

4. Click **View Archived Threads** to view any of the archived message threads.

5. Click New Chat to draft a new Chat Message Thread in the new window.



6. Process the new Chat Message Thread just as you would in the pop-up window.

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If your organization has disabled the Chat feature, the icon does not appear.



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Changing Work Spaces

Changing Work Spaces

Changing Work Spaces

You may have multiple options available to you for your top navigation menu. Each option is known as a **Work Space**. Different work spaces may have different menu items associate with them to help drive different employees' use of the system.

If you have been assigned multiple work spaces, changing the active work space from time to time may be vital.

In the example below, the user has been assigned two different work spaces, Core Application and End User Work Space. As we change from one space to the other, the changes to the top menu are visible.

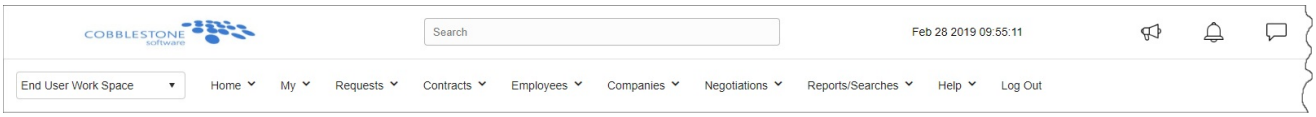
1. Log into CobbleStone. Your default work space is selected and its associated top menu items display.



2. To change the active work space, click the pick-list on the left-hand side.



3. Select the desired work space. The new menu options display.



In the example above, **Add-On Modules** and **Manage/Setup** have been removed from the top-level items. Additional sub-menu items, though not visible, have changed as well. Work space menus can share items or can be completely different.

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Cloud Drives

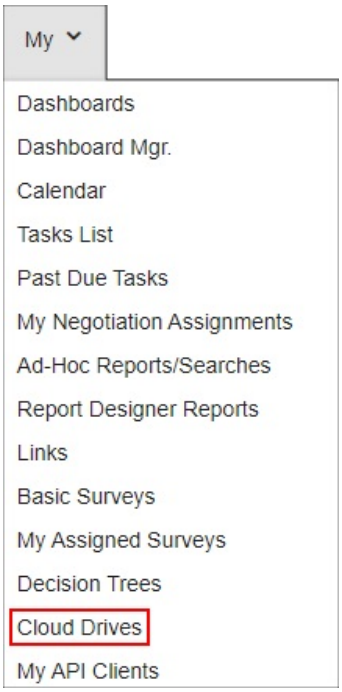
Cloud Drives

Cloud Drives

Users can now import files from and upload files to a Google Drive and/or One Drive 365 for Contracts and E-Sourcing records. Files can also be imported to Document Template Attachments.

Connect an existing cloud drive account

1. Select **Cloud Drives** from the **My** top menu option.



2. The **Cloud Apps - File Storage** screen displays. Click **Add New App Account** link to the right of the cloud drive you would like to connect.



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3. Follow prompts from the cloud drive provider and confirm you would like to provide access to cobblestonesystems.com

4. Once confirmation is complete, you will be directed back to the **Cloud Apps - File Storage** screen.

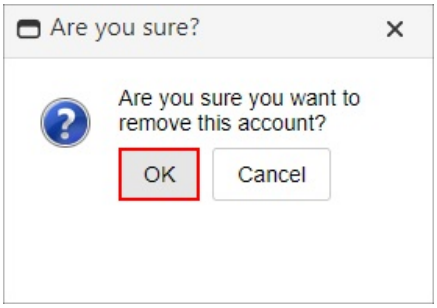


Remove a connected cloud drive account

From the **Cloud Apps - File Storage** screen, click **Remove App Account** link to the right of the connected cloud drive you would like to disconnect.



Confirm you would like to remove the account.



Once confirmation is complete, you will be directed back to the **Cloud Apps - File Storage** screen.



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File Queue

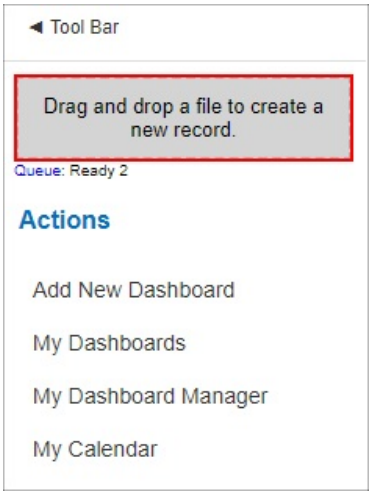
File Queue

Adding a File: File Queue

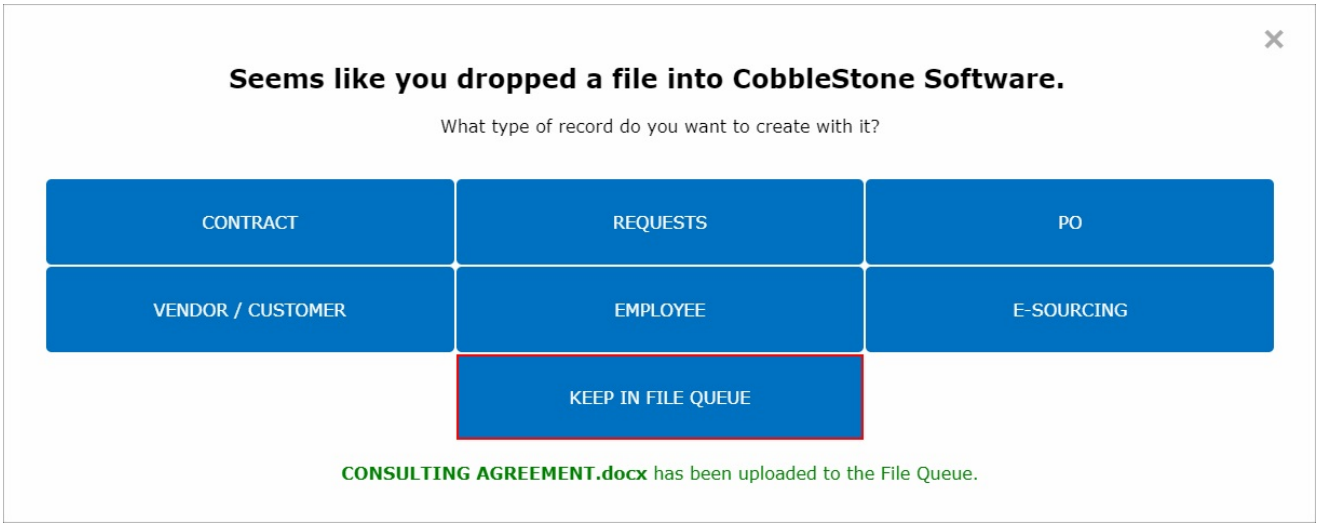
This feature allows users with the proper permissions to select a text-based document/file to upload and then go through the file and select text (within the file) to be highlighted and copied over to a field on the applicable add screen. If not processing the file immediately or assigning the process to another user, the File Queue is invaluable.

Add a File to the Queue

Or on any screen that has the grey drag and drop box in the side menu you can drag and drop a file.



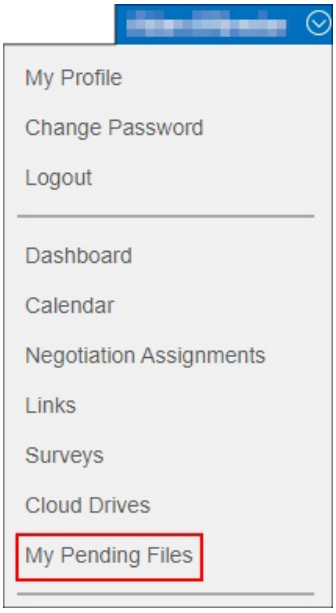
After dropping the file it will prompt for what kind of record you wish to create or to add to the File Queue. Click **Keep in File Queue** to hold onto the document without immediately processing it.



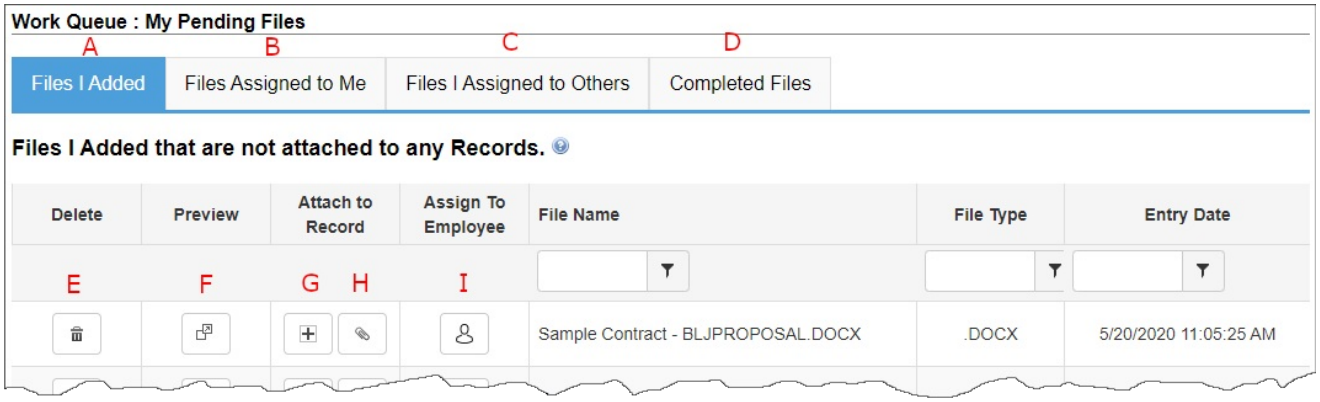
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View the File Queue:

1. To take action with a file in the File Queue, open the User Menu.



2. Click **My Pending Files**.
3. The **Work Queue: My Pending Files** page displays.



Multiple pages are available:

A. **Files I Added**: files added by the current user that have not been acted upon.

B. **Files Assigned to Me**: files added by other users that have been assigned to the current user and have not otherwise been acted upon.

C. **Files I Assigned to Others**: files the current user assigned to others but have not otherwise been acted upon.

D. **Completed Files**: files that have been acted upon.

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Numerous options for the file are available:

E. Delete the file from the queue.

F. View the file in CobbleStone without downloading the file.

G. Create a new record from the file.

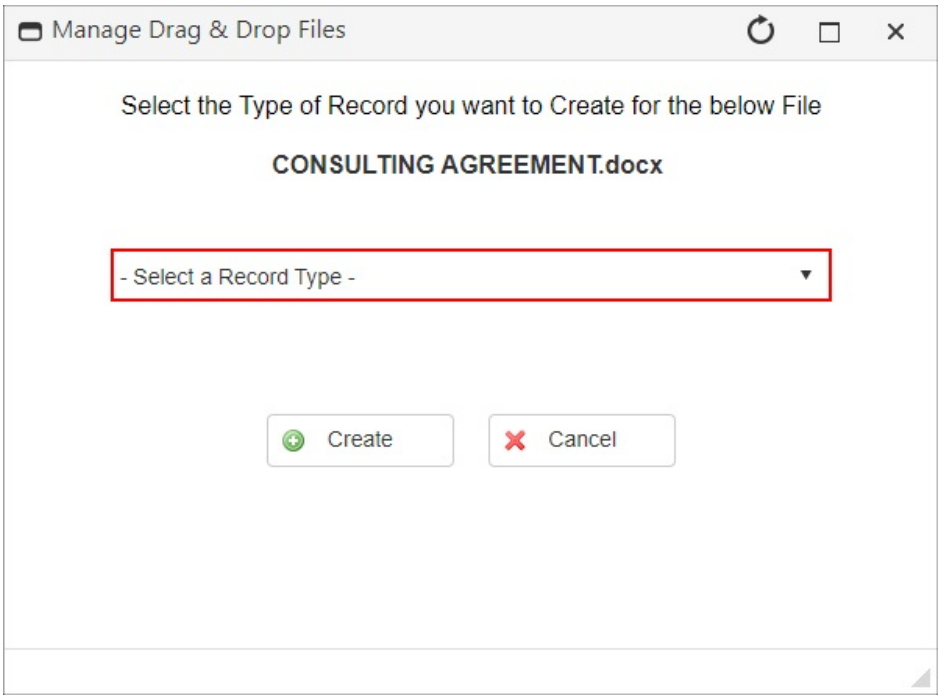
H. Attach the file in an existing record.

I. Assign to Employee: Assign the file to another user.

Adding a New Record:

1) Click the **plus icon** ( ) for the line item.

2) A popup window displays.

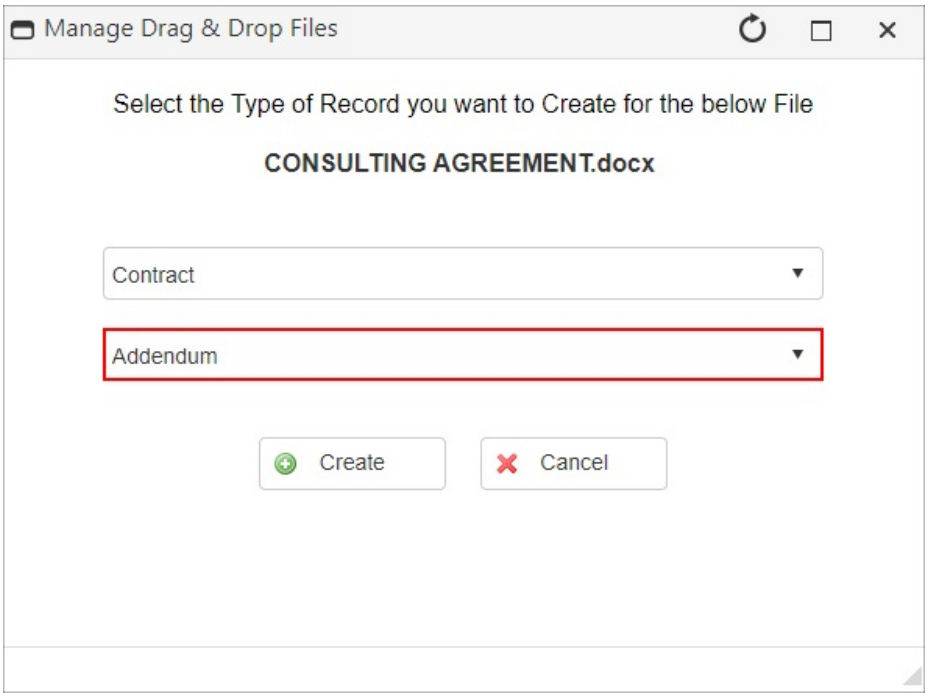


3) Open the **Select a Record Type** pick-list.

4) Select the desired module for the new record.

5) Click **Create**.

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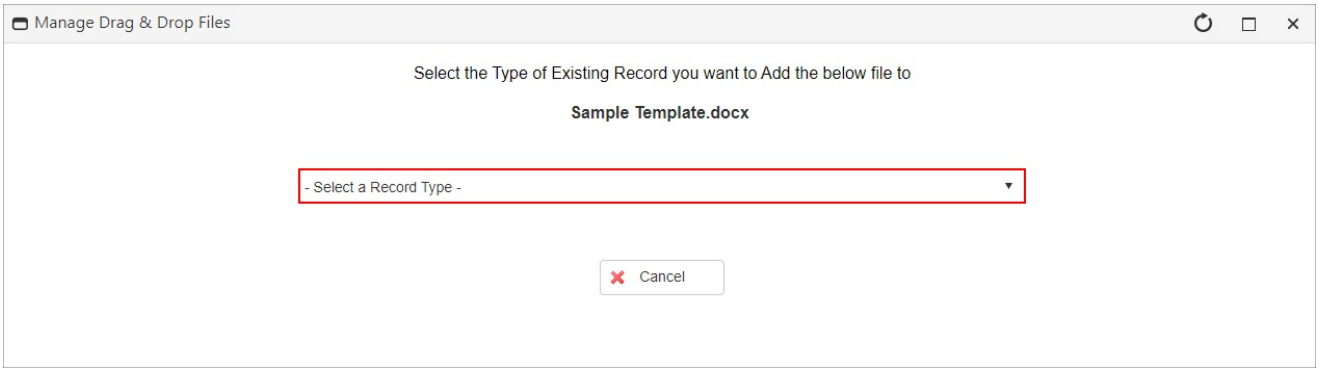
6) Select the record type.

7) Follow the steps for the record type (as found on their respective pages).

Adding to an Existing Record:

1) Click the **paper clip icon** ( ) for the line item.

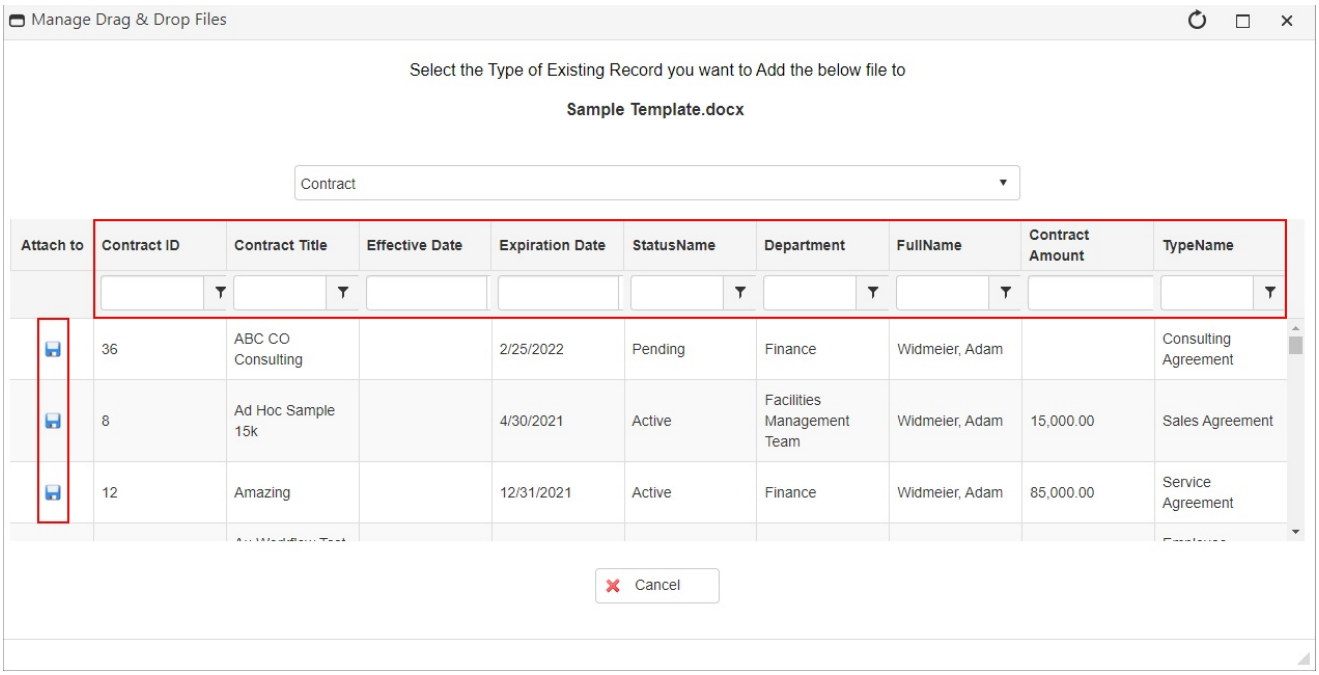
2) A popup window displays.



3) Open the **Select a Record Type** pick-list.

4) Select the desired module.

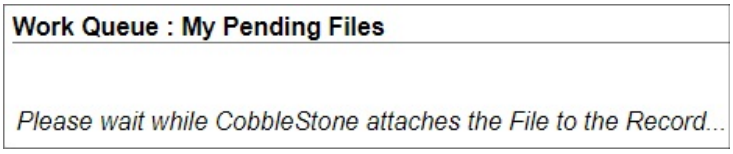
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5) Filter the list/search for the desired record

6) Click the disk icon ( ) for the line item.

7) CobbleStone attaches the file to the appropriate record



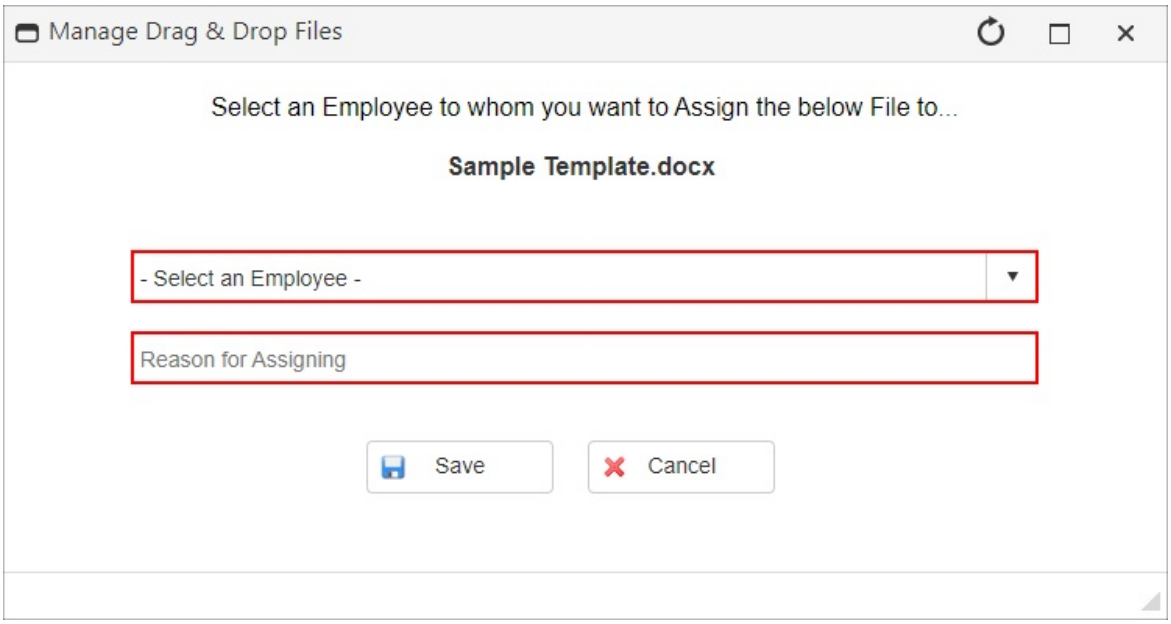
8) The details page for the selected record displays.

Assign a File to a User:

1) Click the person icon ( ) for the line item.

2) A popup window displays.

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3) Open the **Select an Employee** pick-list.

4) Select the employee for assignment.

5) Optionally, enter a reason for assigning the file to that individual.

6) Click **Save**.

Viewing Completed Files:

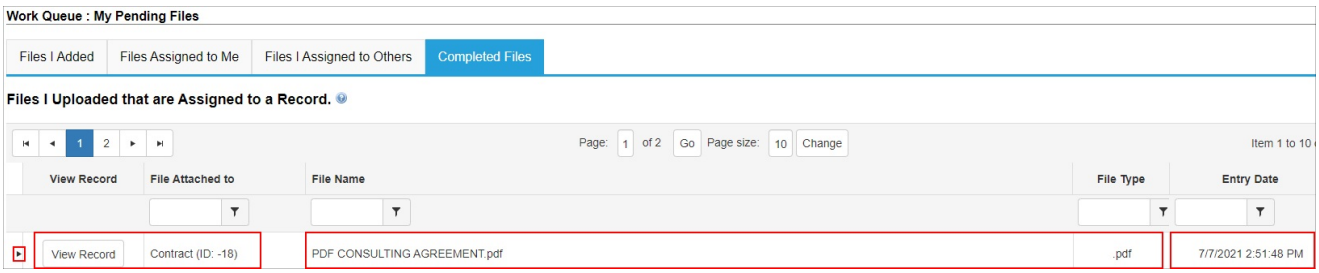
1) Click Completed Files

2) Data regarding the action is available:

A. Button to view the record to which the file was attached and the module and ID of the record to which the file was attached.

B. File name and extension.

C. The date and time the file was uploaded.



3) If the file was assigned to another user, click the carat to view the assignment information.

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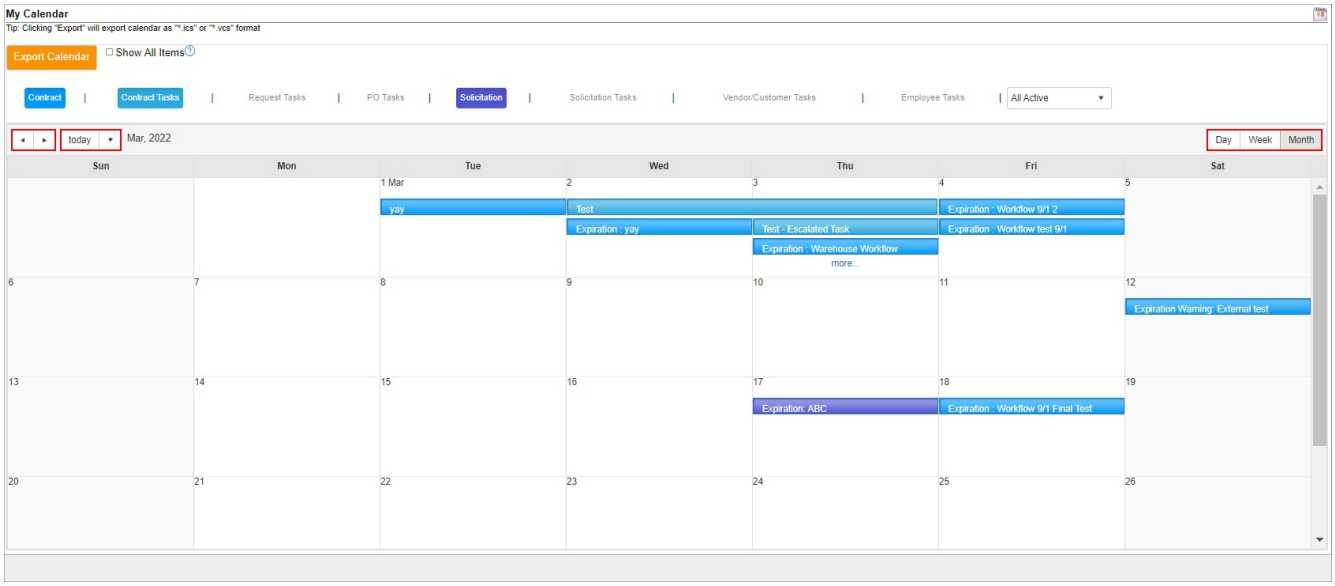
Calendar Overview & Navigation

Calendar Overview & Navigation

My Calendar: Overview & Navigation

Contract Insight includes a web-based calendar and diary notes feature. The Application Calendar displays contract and task alerts. Contract alerts include contract expiration dates, review dates, and expiration notification dates. Task alerts include tasks, alerts, and events configured within Contract Insight. The calendar can also be used to keep notes and track appointments for each user.

Navigating the Calendar



To navigate to various months, use the **<,> arrow** while in Month view.

To navigate to a particular date, click the **Today** dropdown and navigate to the desired date.

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Calendar Views

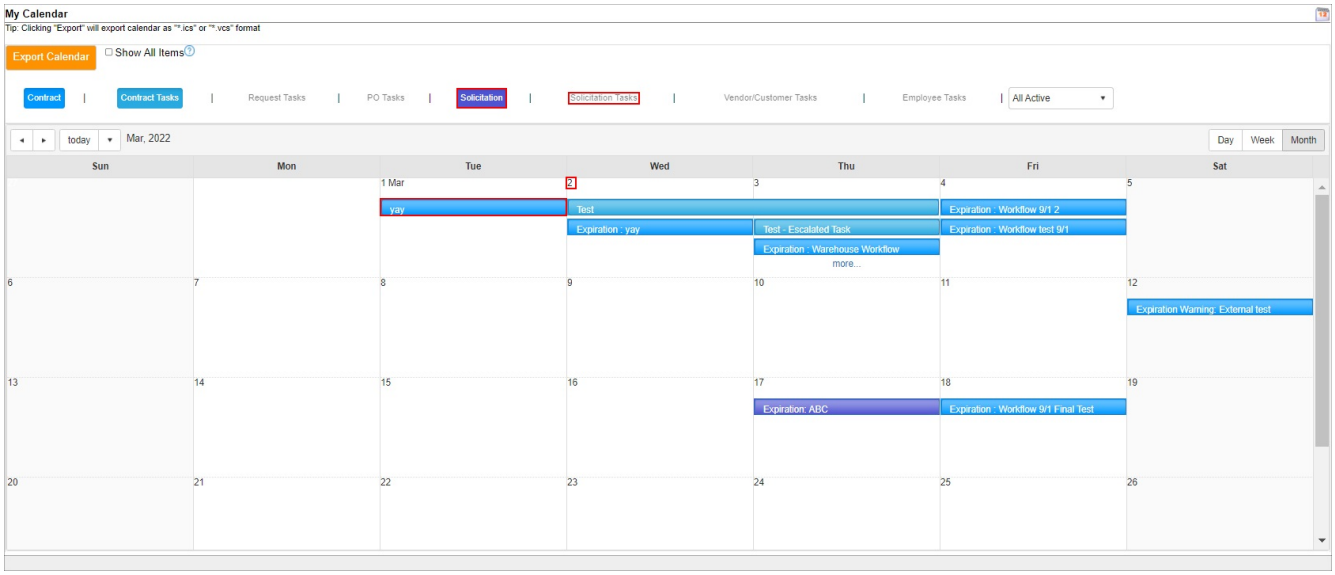
Calendar Views

My Calendar: Calendar Views

There are a number of ways to access different parts of your calendar based on what is to be accessed:

To View the Day View of the Calendar:

Click the numerical date of the day to view. The day's contract and task alerts display. By selecting the date, Diary Notes can be added.



To View Contract Details

Click the Contracts item on the Calendar to view to navigate to that particular contract's **Contract Details** screen.

To View Contract Tasks

Click the **Contract Tasks** item on the calendar to view (the **Tasks, Alerts, Events, & Workflow** portion of the **Contract Details** screen displays).

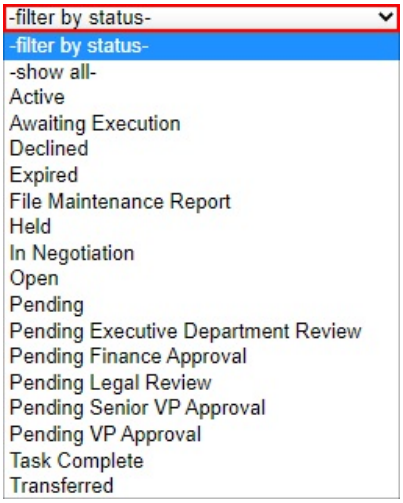
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Calendar Filtering

Calendar Filtering

My Calendar: Filtering

Contract Insight provides the ability to filter what contracts you see in your calendar view by contract status. To do this, click the **Filter By** drop down box on the Calendar home screen and select the type of contract status by which to filter.



To clear the filter, click the **filter by** drop down box again and click **Show All.**

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Recent Calendar Activity

Calendar Recent Activity

This functionality has been removed.

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Exporting My Calendar

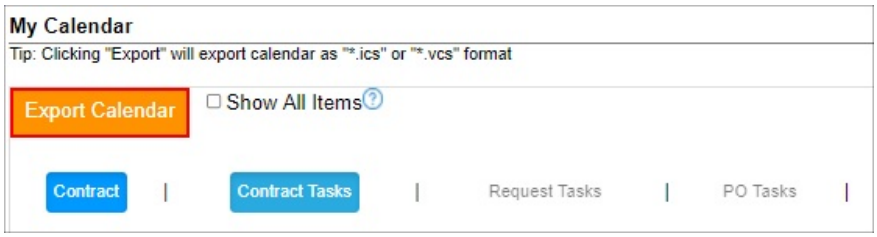
Exporting My Calendar

My Calendar: Exporting

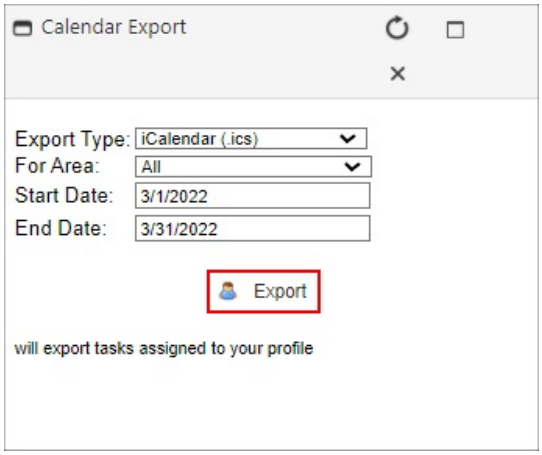
Contract Insight provides standard vCal/iCal point-in-time calendar exporting, so users may export to numerous domains and/or most modern email/calendar programs. It is recommended to export to MS Outlook.

To Export My Calendar:

1. To perform a standard vCal/iCal point-in-time application calendar export (contract and task notifications), click the **Export Calendar** icon.



2. The **Calendar Export** window displays. Enter the the desired date range and click **Export**.



3. Click select **Save File** and then click **OK.**

4. After the file has been save as a .vcs file, follow your e-mail client's procedure for importing a .vcs calendar.

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Dashboards Overview

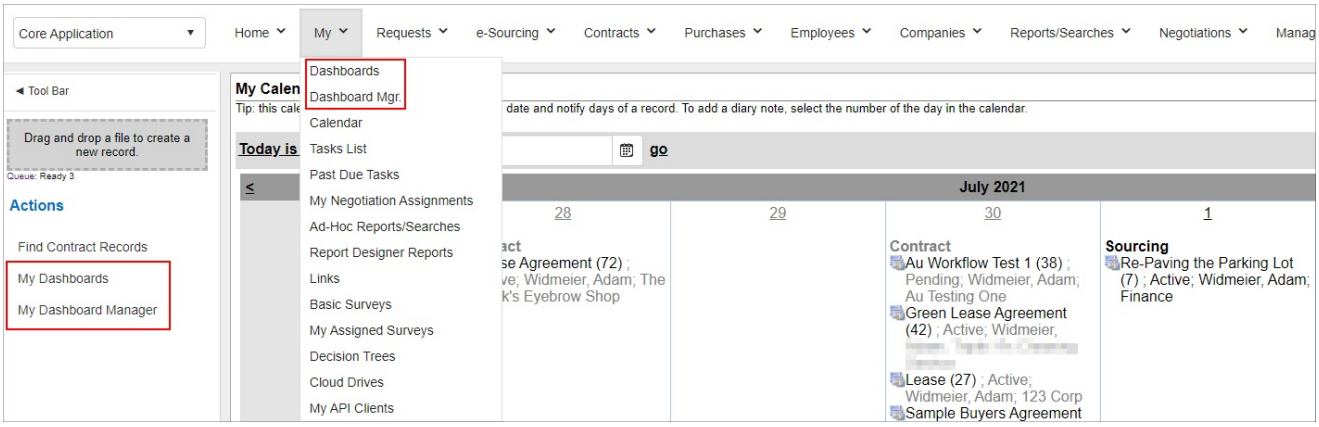
Dashboards Overview

Dashboards: Overview

Contract Insight provides users with the capability of creating personalized dashboard(s). A dashboard is a form of home screen where the user can add different views, or **docks**. There is no limit to how many dashboards a user may create.

Upon first logging into the system, the **My Calendar** page because a dashboard has not yet been configured. Once a dashboard has been created, each subsequent time a user logs into the system, he or she is taken to the **My Dashboards** page if **Is Default** was set to Yes upon creating of the dashboard.

Below are some ways to access dashboards. You can also see the Wiki pages "**My Dashboards**", "**Dashboard Docks**", and "**Dashboard Manager**" for further information and navigation instructions.



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Dashboard Manager

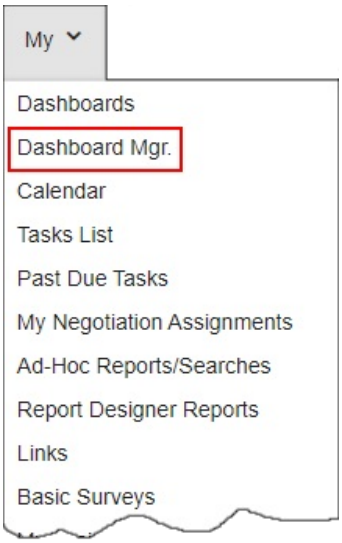
Dashboard Manager

Dashboards: Manager

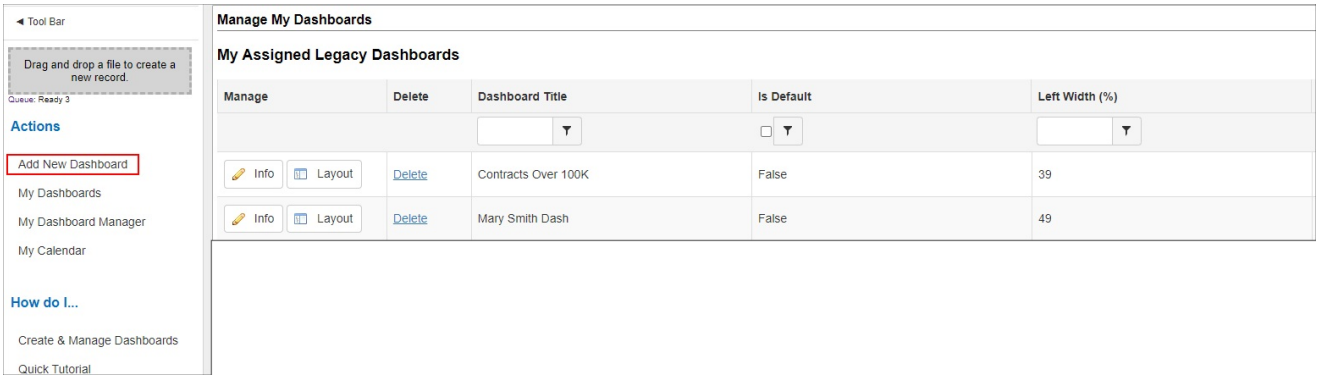
The dashboard manager provides a list of all of the dashboards a user has configured for him or herself along with the ability to manage/edit or delete them.

Creating a Dashboard:

1. Select **Dashboards Mgr.** from the **My** top menu option.

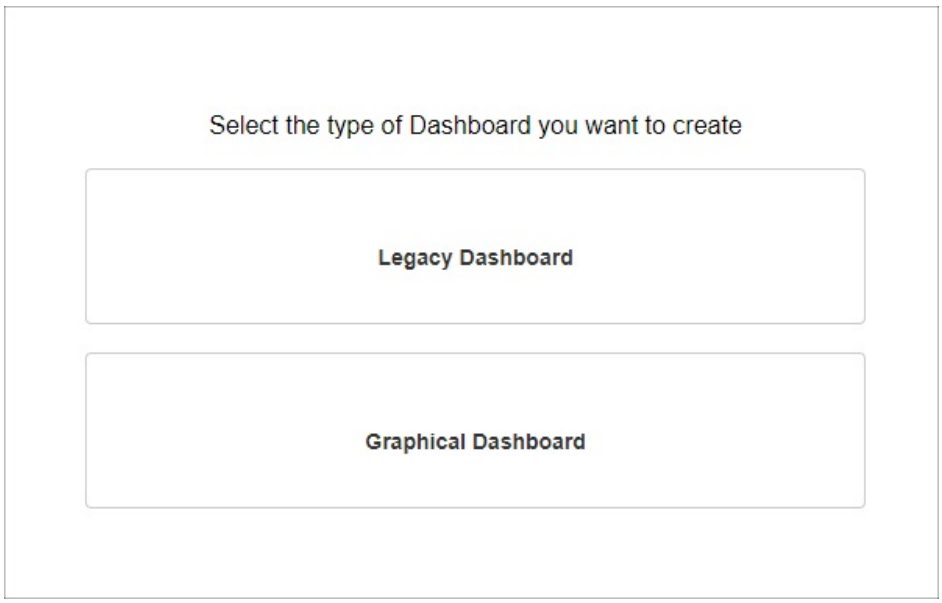


2. The **My Dashboard Manager** screen displays. Click **Add New Dashboard** from the side menu.

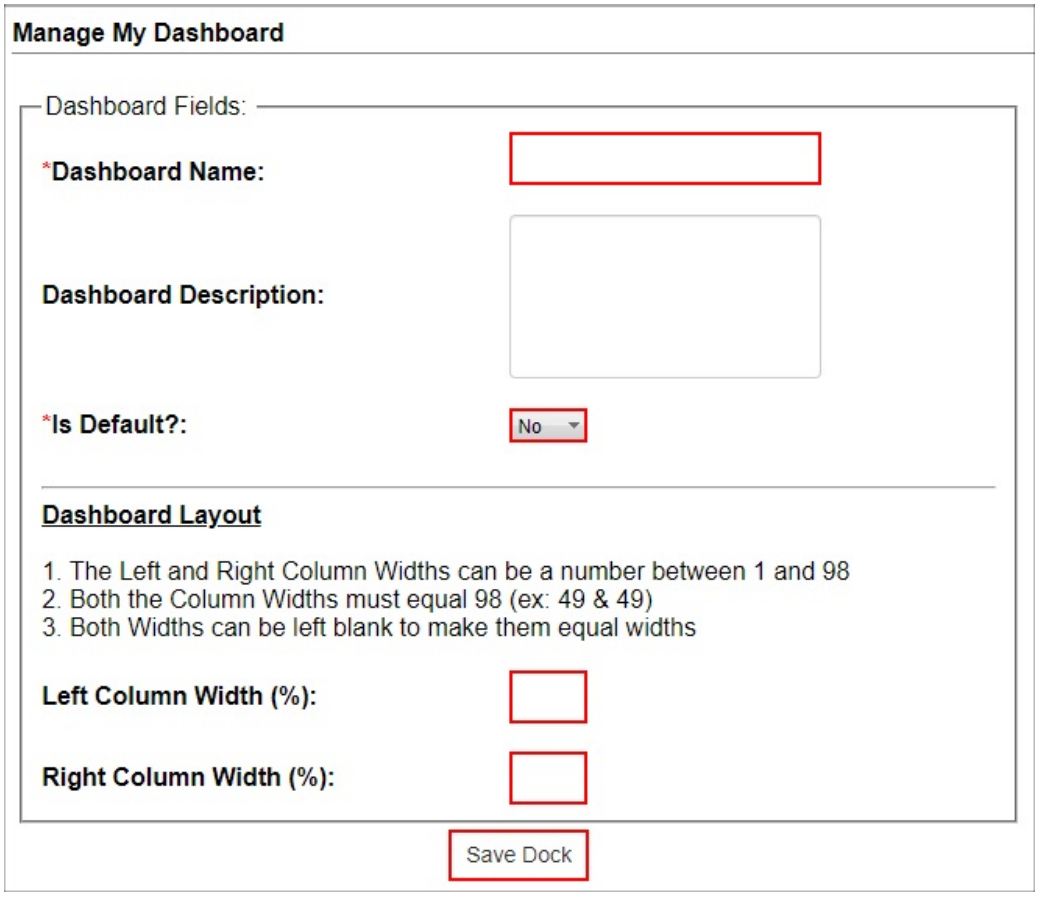


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3. Choose the dashboard type.



4. Provide the required information.



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Note: The **My Dashboards** page will initially display your default dashboard. When creating your dashboard, you can select whether the dashboard is default or not by using the **Is Default** drop down item. All other dashboards will be available from the dashboard drop down menu on the **My Dashboards** page (see the **My Dashboards** page of Wiki).

5. Click **Save** to return to the **My Dashboard Manager** screen where a list of your dashboards (including the newly created dashboard) displays.



6. To configure your dashboard once it has been created and saved, you can add **Docks** (See the **Docks** page of Wiki).

7. **My Dashboard Manager** is accessible from several different screens as well on the side menu.

To Change/Manage your Dashboard:

Click **Info** or **Layout** for the dashboard to modify.

The **Info** screen will look exactly like the screen where you first created the dashboard. Be sure to click **Save** to save any changes.

The **Layout** screen will allow the user to add Docks, Button Tiles, and/or Summary Tiles.

Deleting A Dashboard:

Click **Delete** for the dashboard line item to remove.

If **Delete** is not available to be selected, click **Manage** link first and change **Is Default** to **No**. Save the changes.



Once saved, **Delete** will be available.

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When clicking **Delete**, a prompt will display to verify the to deletion of the dashboard. Click **OK** to proceed to delete it or click **Cancel** to return to the **My Dashboard Manager** screen.

STIMULSOFT GRAPHICAL DASHBOARDS

The New Stimulsoft Dashboard presents a top-in-the-class kind of modern dashboard with graphical elements to provide valuable information to the user at a glance. This dashboard can be used to compare various fields, show summary of various fields, etc.

Using the Stimulsoft Dashboard is like using the Stimulsoft Report in CobbleStone. **Just like the Stimulsoft Reports, Dashboards generated with this tool will not enforce Application User Permissioning without the appropriate filters defined within the Dashboard**. Hence, only System Admins can create new Dashboards.

To Create a New Dashboard :

Step 1 : Go to your Dashboard

Step 2 : Click on Add New Dashboard.

Step 3 : Choose Graphical Dashboard.

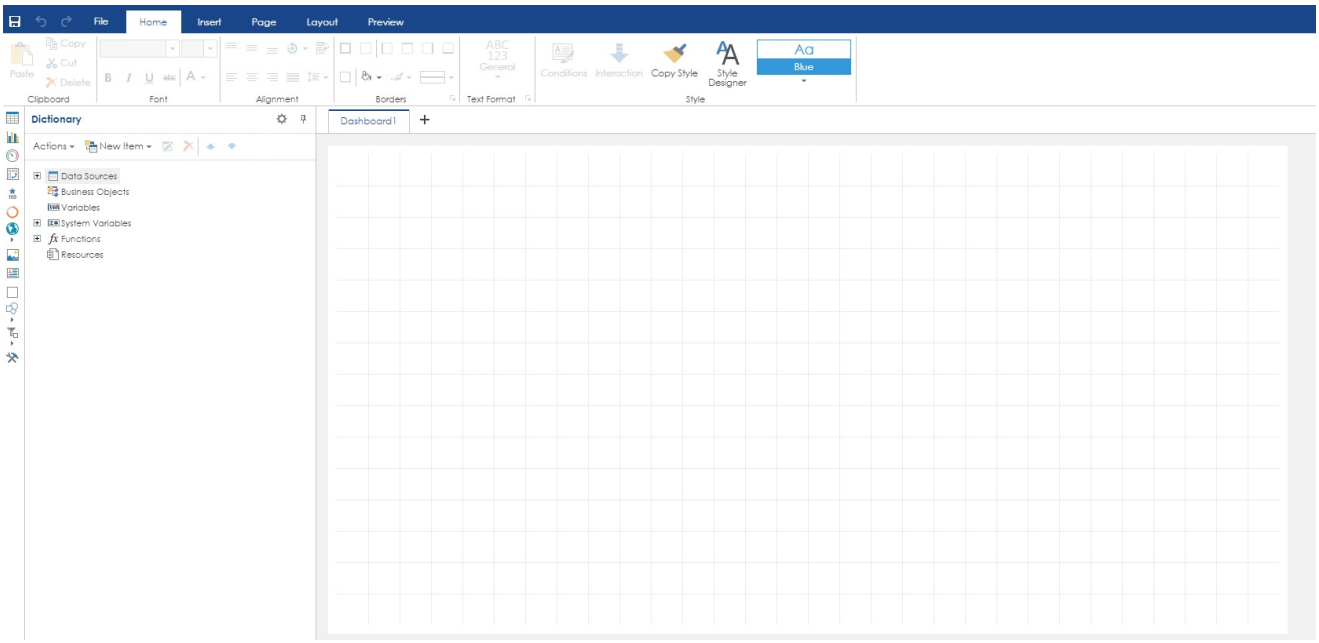
Step 4 : Type in a Dashboard Name, choose the various sections from which the data is to be collected for the Dashboard, and type in a description for the Dashboard.



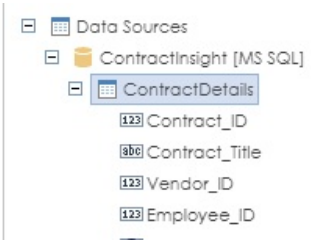
Step 5 : Click on Create Dashboard button.

Step 6: You'll arrive on the Dashboard Designer page.

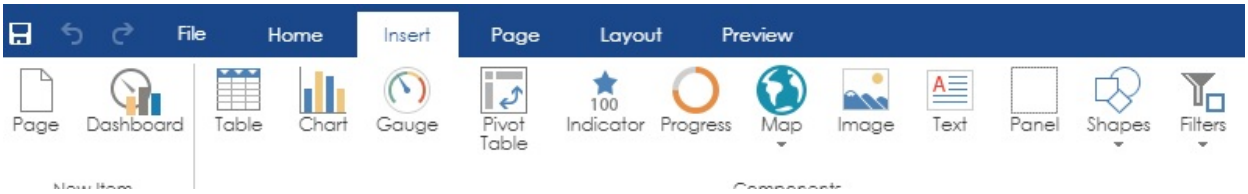
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Step 7: Expand the Data Sources to reveal all your fields.

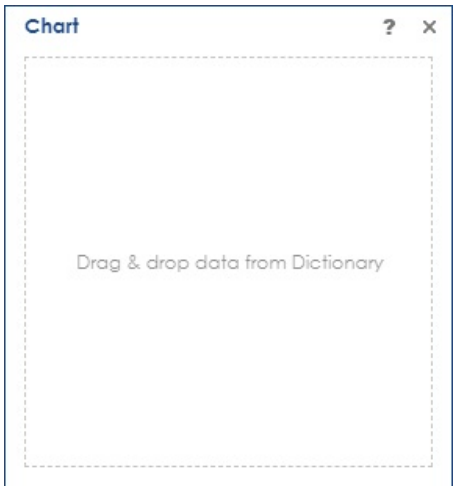


Step 8 : Go to the Insert tab and click on the type of Graphical chart you need.

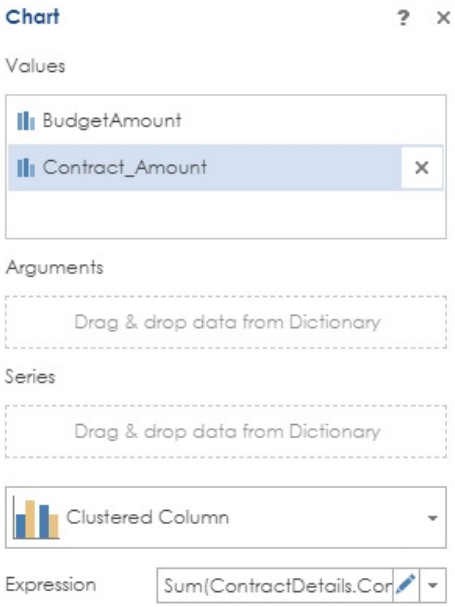


Step 9 : Once you click on one of the elements, go to the Design board and click where you want the graph to appear. The chart should appear where you clicked with a Drag & Drop data from dictionary box with it.

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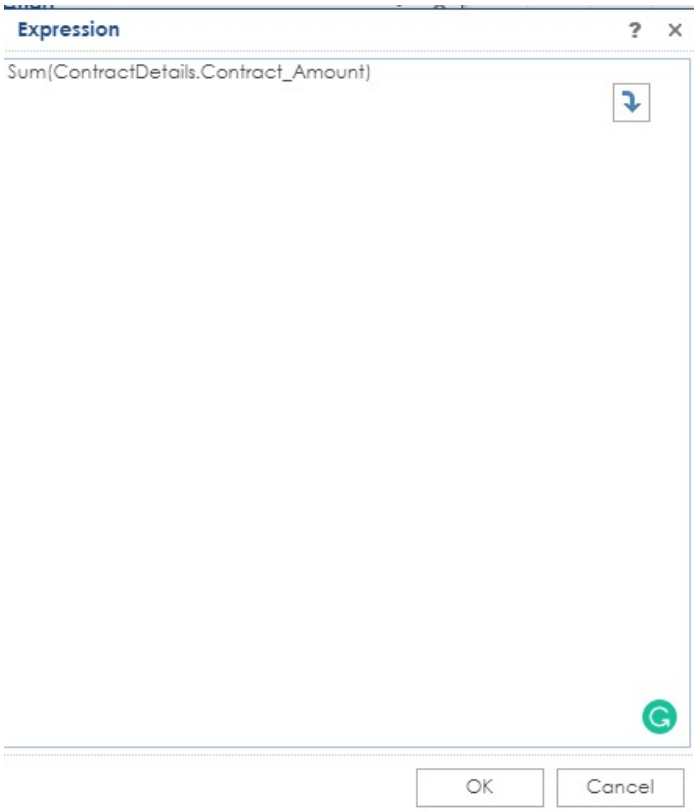


Step 10 : Drag one of the fields from the left side menu Data Sources to the box.



Step 11 : You can type in custom expression by clicking on the Edit icon on the Expression field (the last field in the box), where you can write your custom expression.

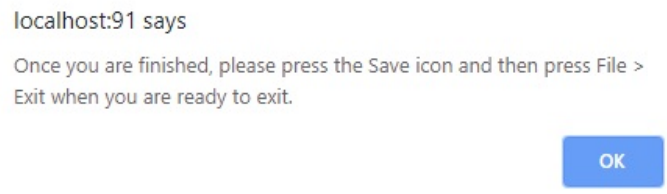
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Step 12 : Click on the Close button in the expression box. Now you can resize the Graphical Element in the Designer view.

Step 13 : Continue the steps 8 to 12 for other graphical elements that you need.

Step 14 : Once you are finished with the Design, press the Save icon and then press File > Exit to exit the Stimulsoft Dashboard Designer.



Step 15: The next screen will show the various details about the dashboard. At this screen, assign the newly created dashboard to the users (including the creator of the dashboard). This is because the dashboard won't take user permissions into consideration.

Step 16 : You have created your awesome Graphical Dashboard!

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CONFIGURATION of Graphic Dashboards

Admins may choose to Disable / Enable this feature in their system. To do so, go to :

Manage Setup > Application Configuration > Config Settings

In the dropdown box to select Configuration Group, choose General System.

You'll see 1 App Config setting associated with this :

1) Graphical Dashboard: Enabling this will enable the Graphical Dashboards for users.

For more information, please see the manual attached to this wiki article.

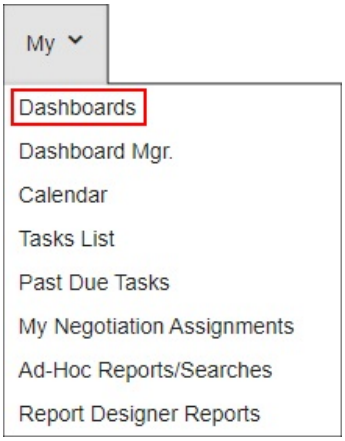
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My Dashboards

My Dashboards

Dashboards: My Dashboards

Access the **My Dashboards** page by either navigating to **Home** > **My Dashboards** or to **My** > **Dashboards**. Both of these options go to the same **My Dashboards** page from anywhere in the Contract Insight system. Other shortcuts are provided on some pages throughout the system on the side menu.



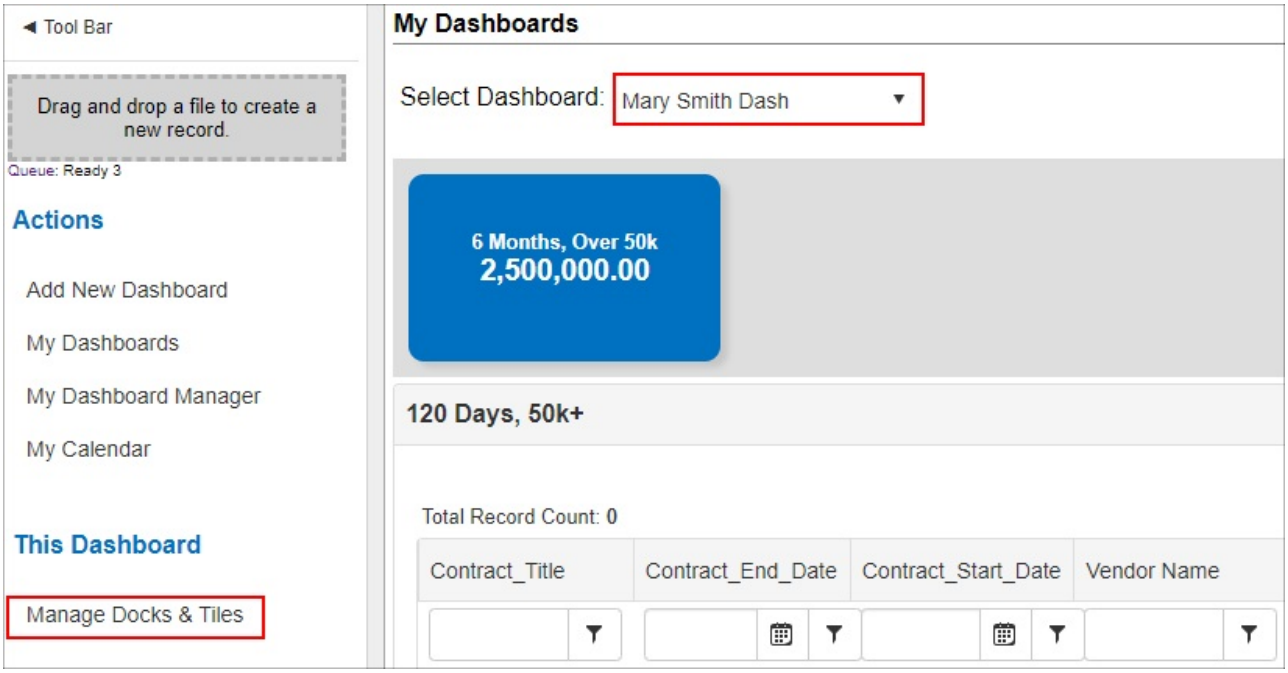
The initial view of the **My Dashboards** screen will be the dashboard for which **Is Default** is set to Yes. If no dashboard is set to **Yes** for Is Default, a screen with a drop down menu of all created dashboards displays.

Note: The default dashboard may be dictated by the system administrator by assigning a system dashboard and marking it as the default.

Select from the drop down list the name of the dashboard you would like to view.

To modify the information displayed on the dashboard, click **Manage Docks & Tiles** (see the **Dashboard Docks** page of the Wiki).

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Dashboard Docks

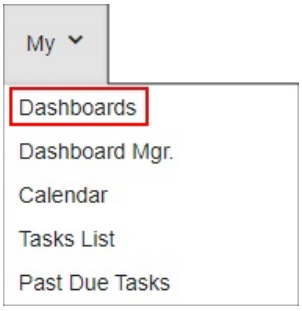
Dashboard Docks

Dashboards: Docks

With each dashboard, a user is allowed to add up to 16 **docks**. A dock is a section of the dashboard that displays specifically requested information.

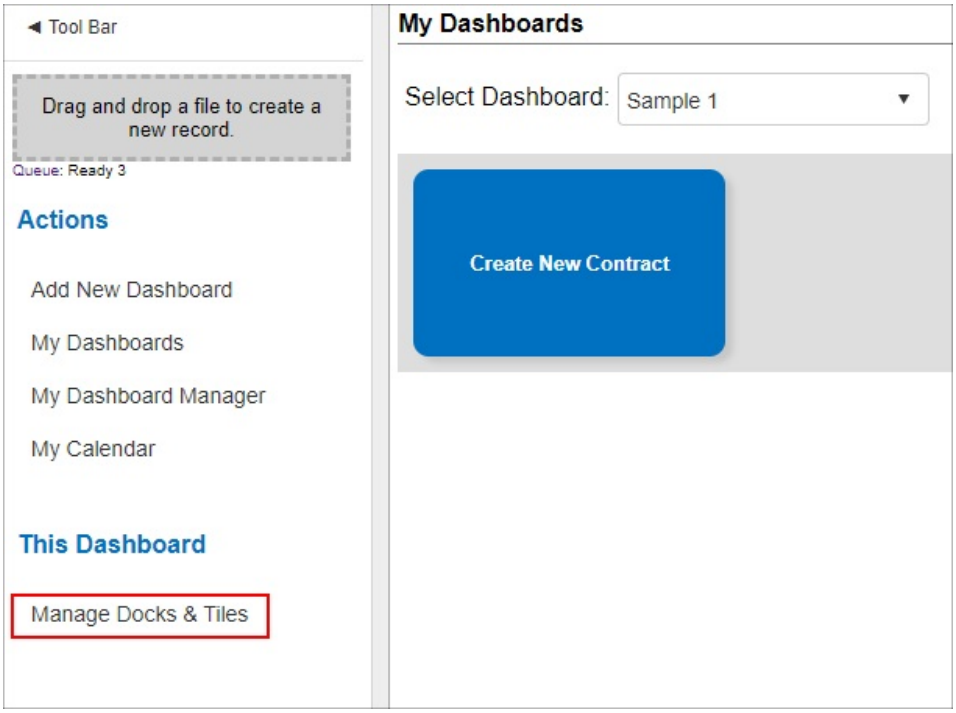
Adding a Dock

1. Navigate to the **My Dashboards** screen



2. From the **Select Your Dashboard** drop down menu, select the dashboard for which a dock is to be added.

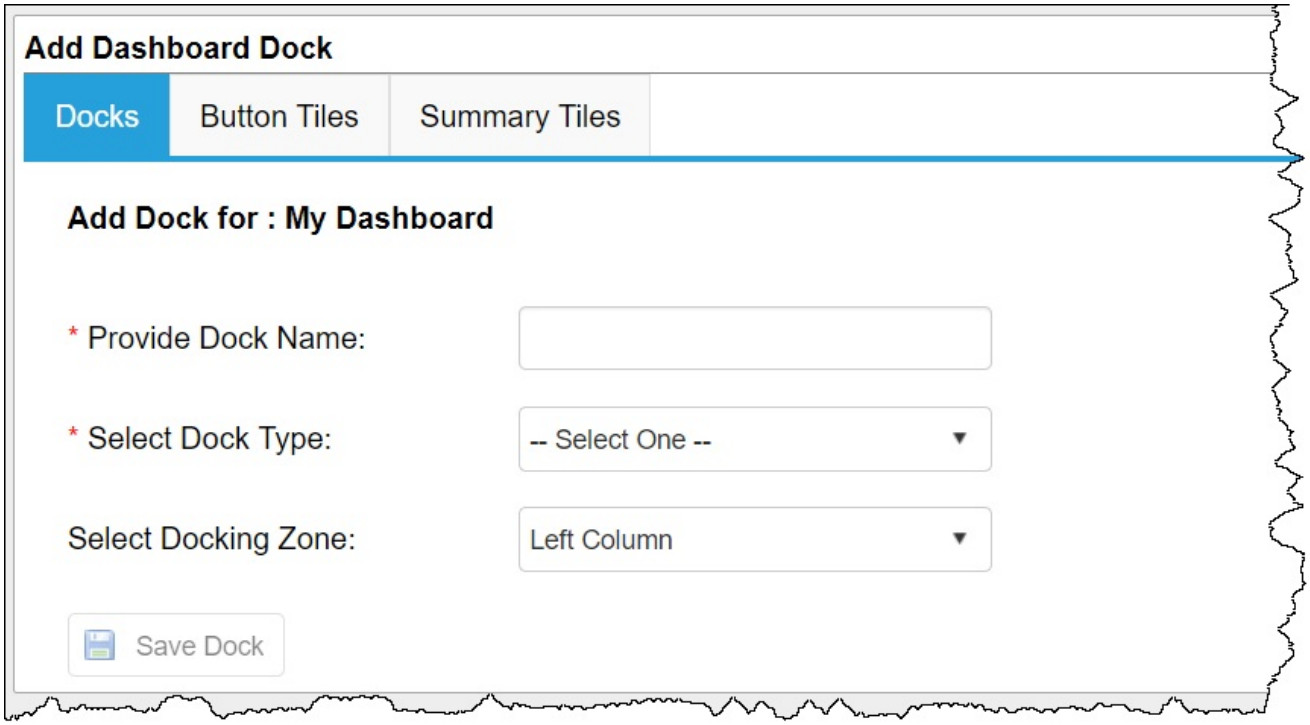
3. Click **Manage Docks & Tiles**.



4. Once on the **Add Dashboard Dock** Screen, choose the **Docks**, **Button Tiles**, or **Summary Tiles** tab

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Docks



1. When selecting a dock type to add, there are several options.

2. Depending on the type of dock you select you will be provided with additional options:

   a. **My Calendar** - This will add your calendar to the dashboard appears on the screen

   b. **Ad-Hoc Reports/Searches** - A new drop down box with a list of all Ad-Hoc Reports/Searches available appears (see **Ad-Hoc Wizard Overview** Wiki page for more information on Ad-Hoc Reports/Searches).

   c. **Legacy Custom Searches** - A new drop down box with a list of all Legacy Custom Search reports available appears.

Note: Any docking station that displays an Ad-Hoc Report/Search or Legacy Custom Search Report has the option of limiting the number of result rows displayed.

   d. **Web Address** - you may add any web address to be able to access from your dashboard (i.e. http://www.cobblestonesystems.com). Be sure to include http:// or https:// as applicable to the site.

Note: Not all websites permit display within such a dock.

3. Select the docking zone for which the new dock should be added.

4. Click **Save Dock**.

5. The after selecting **Save Dock**, the dashboard to which the dock was added is modified. **Good Save!** displays upon a successful save.

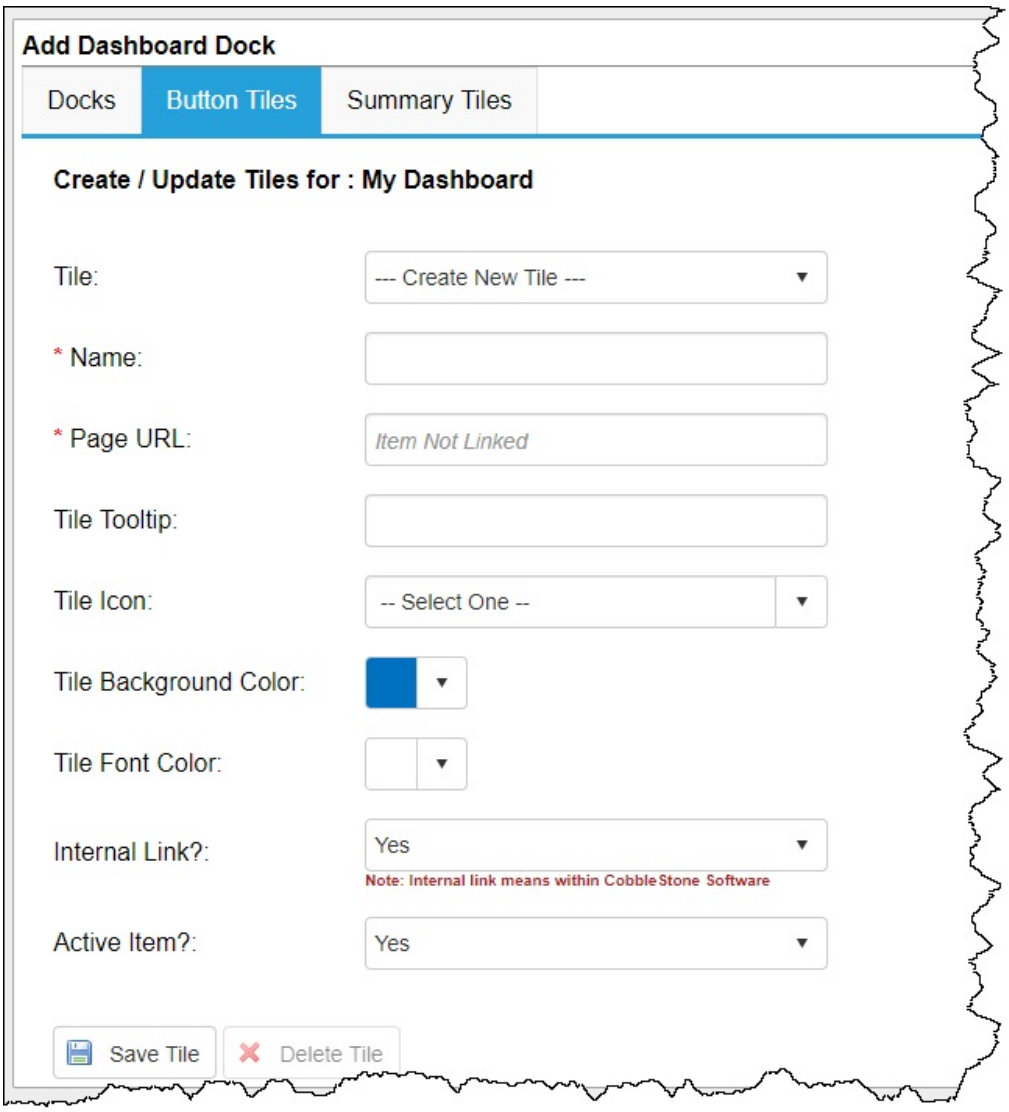
6. Click **My Dashboards** from the side menu to display the new dashboard with the dock in place.

Note: CobbleStone Software Best Practices recommends adding no more than six (6) docks per dashboard.

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Button Tiles

Button tiles are user created shortcuts to various parts of the system or to an external site.



1. Select the **Button Tiles** tab

2. Leave as **--- Create New Tile ---** to create a new tile (To edit an existing tile, select it from the drop down list)

3. Give the Button Tile a **Name**

4. Provide the destination **Page URL**

5. (Optional) Add a **Tile Tooltip** to show when the user hovers the mouse button over the Button Tile

6. (Optional) Choose a **Tile Icon** to show on the Button Tile

7. (Optional) Customize the **Tile Background Color** and **Tile Font Color**

8. Choose whether the tile is an **Internal Link** (internal means within Contract Insight). If internal, the URL will open in the same tab, otherwise, it will open in a new tab.

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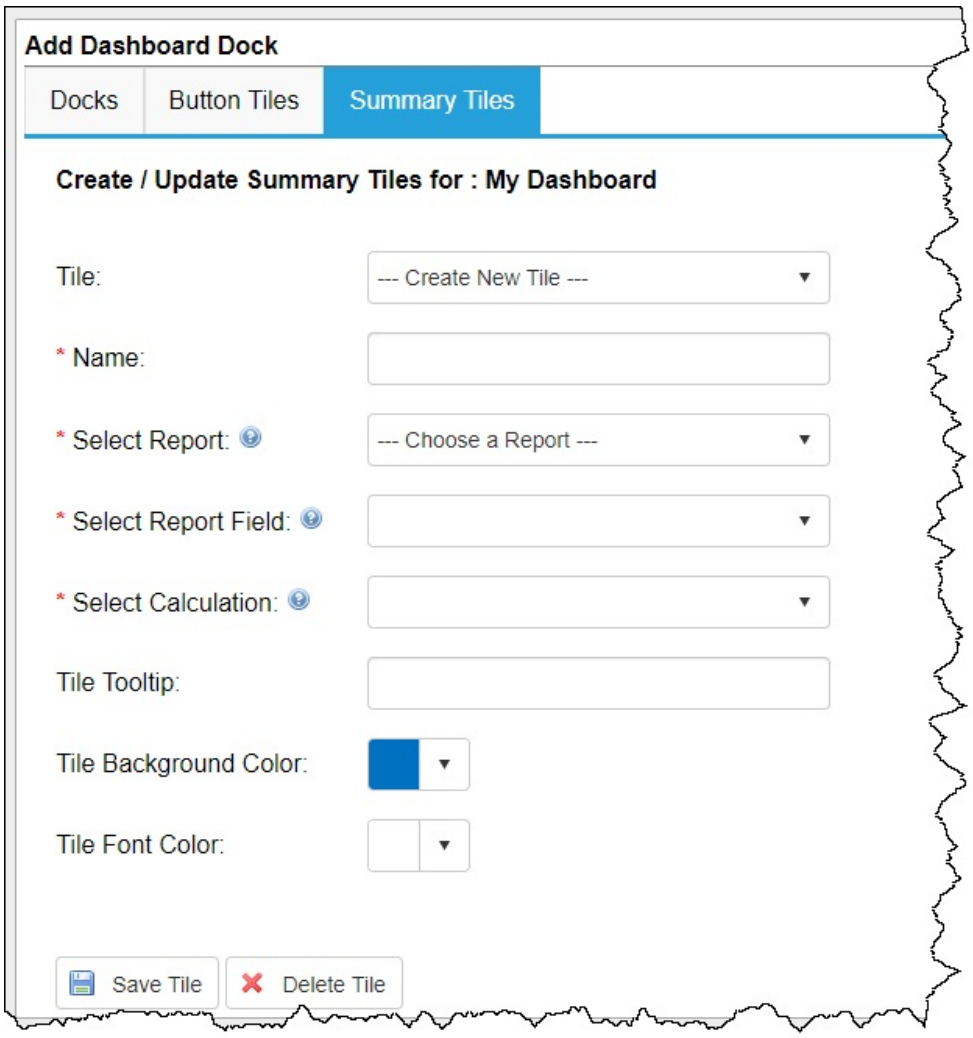
9. Choose whether the tile is an **Active Item**

10. (When modifying existing tile only) Specify the Order number of the Tile shown on the Dashboard

11. Click **Save Tile**

Summary Tiles

Summary Tiles are used to show summarized information from the various Ad-Hoc Reports and appear below any Button Tiles on the Dashboard.



1. Select the **Summary Tiles** tab

2. Leave as **--- Create New Tile ---** to create a new tile (To edit an existing tile, select it from the drop down list)

3. Give the Summary Tile a **Name**

4. **Select Report** that contains the information to show

5. **Select Report Field** to be summarized

6. Choose the **Calculation** operation to be performed on the field.

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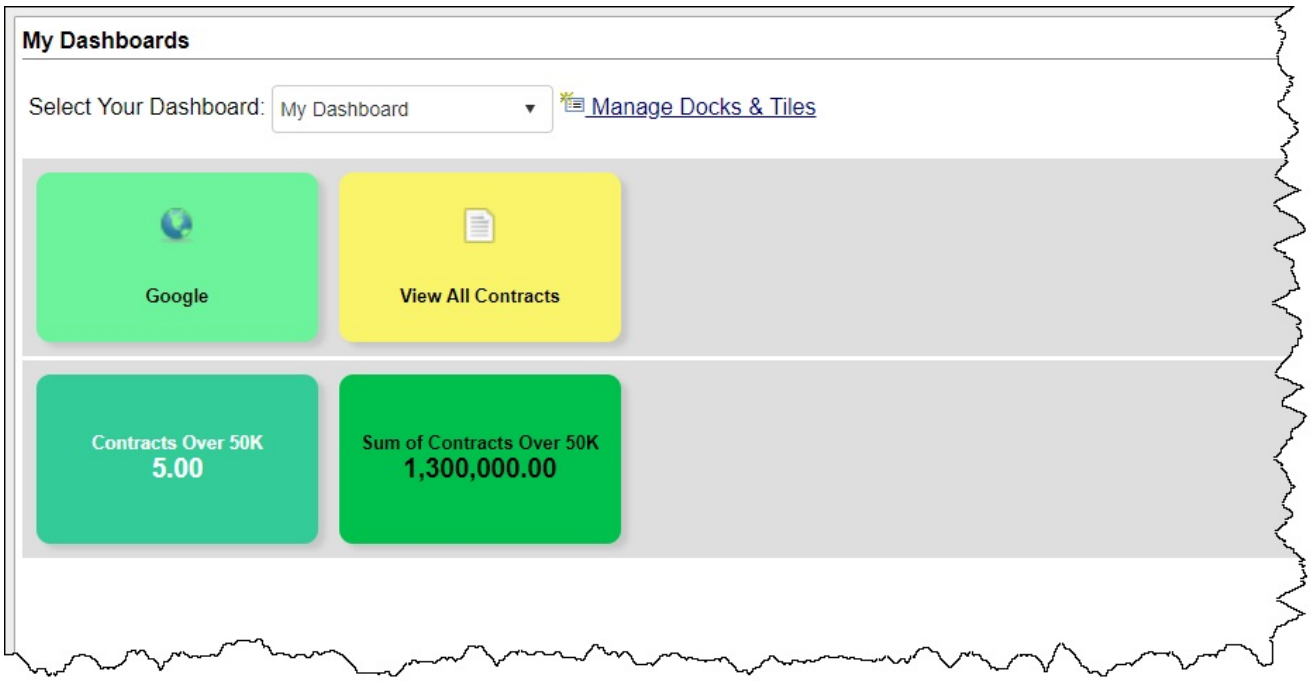
7. (Optional) Add a **Tile Tooltip** to show when the user hovers the mouse button over the Summary Tile

8. (Optional) Customize the **Tile Background Color** and **Tile Font Color**

9. (When modifying existing tile only) Specify the **Order Number** of the Tile shown on the Dashboard

10. Click **Save Tile**

Tiles show at the top of the Dashboard, with Button Tiles on top then Summary Tiles underneath. Any other Dashboard Docks that were created will show under the Tiles.



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Searching & Reporting Overview

Searching & Reporting Overview

Find/Search Contracts: Searching & Reporting Overview

Contract Insight can search and report off of any key word/number/date in standard and user-defined fields.

Contract Insight includes many levels of searching such as: Google-like **QuickSearch**, field by field search; ad-hoc query; full custom report designer; scheduled reports; email reports; exportable reports; reports that can be set to display on the application homepage; reports can be saved and shared (assigned to) with other users.

Contract Insight has a fully customizable, online report designer that offers users complete control over the appearance, layout, and information on each report. The drag and drop report designer feature is very similar to the functionality found in other 3rd party reporting tools such as Crystal Reports, Business Objects and Cognos. This report designer can greatly improve upon the appearance of simple canned-reports and allow users to create very complex, technical reports that include text, images, graphics, variables, conditions, cross-tables, multiple data summary options, and much more. With numerous exporting options including Word, Excel, PowerPoint, PDF, CSV, Rich Text, Image formats, and many more, CobbleStone Software's Custom Report Designer offers robust querying and reporting capabilities.

There are several ways to go about searching for/through the contracts that are in the Contract Insight system.

1. Find/Search Contracts
2. Search Files/Notes
3. QuickSearch

Click any of the above numbered items to navigate directly to that Wiki page for more information.

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Field Level Searching/View All

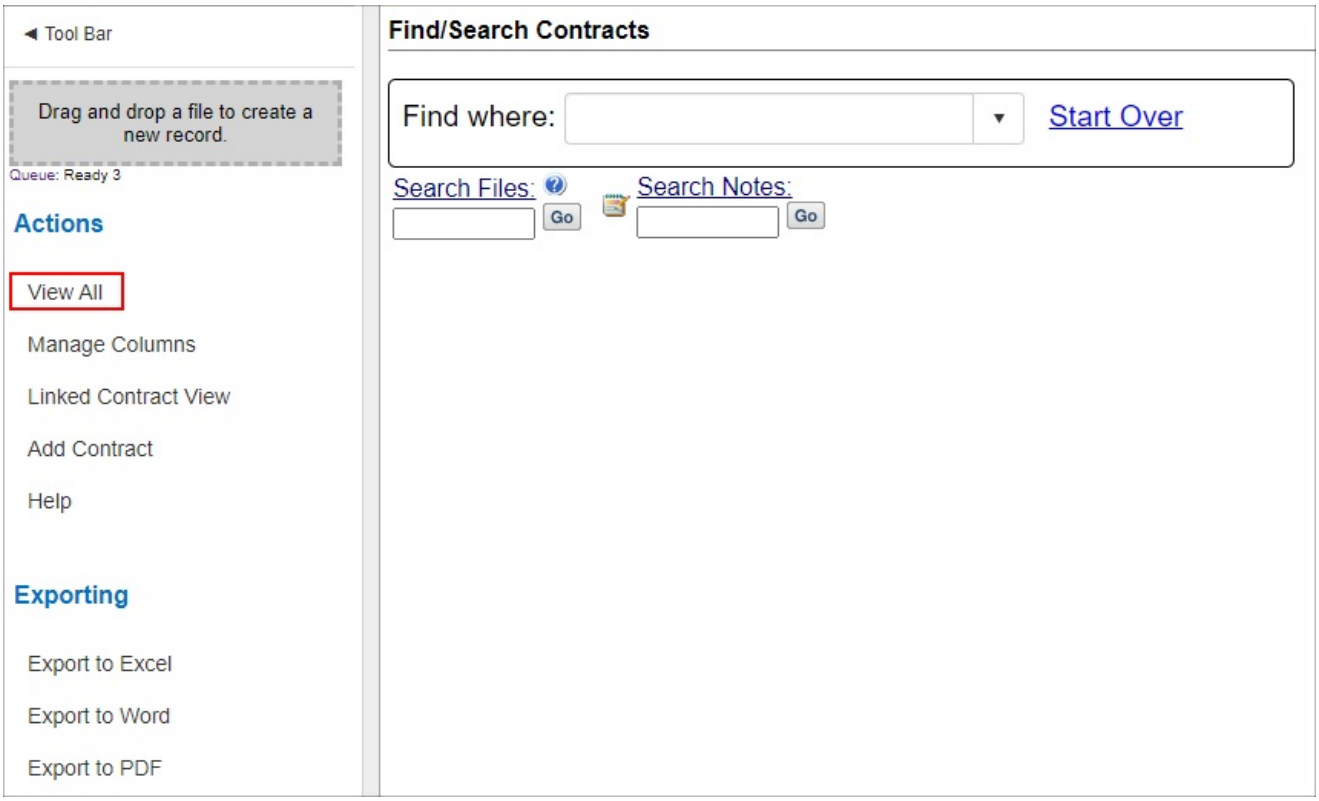
Field Level Searching/View All

Find/Search Contracts: Field Level Searching/View All

The **Find/Search Contracts** feature allows users to perform field-level searching and reporting for contracts. This search option is helpful when searching for something such as all of the contracts to which a particular employee is assigned.

View All Contracts in your Contract Insight Application

Click **View All** under **Actions** on the side menu of the **Find/Search Contracts** screen.



Field-Level Searching

1. On the top navigation bar, navigate to **Contracts** > **Find/Search Contracts**.



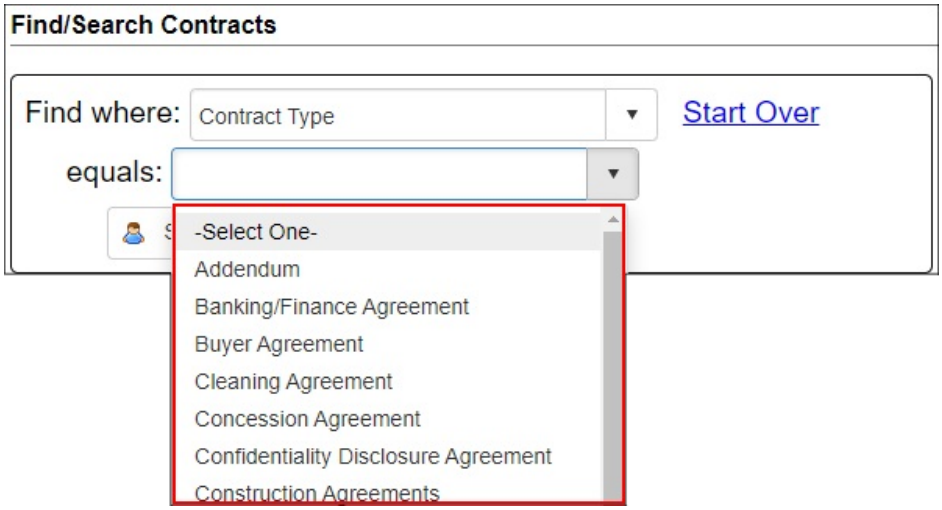
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2. In the **Find where** drop down menu, select the area to be searched.

3. Depending on the selected field's field type, presented additional options display.

- For Drop Down Fields: a second drop down, one from which to select the value for which to search where the field **Equals**, displays. User-defined drop-down field values are also available.





- For Text Entered Fields (such as Text Box, Currency, Integer, Decimal Field Types): enter text into a text box where you can find where the selected field **Is Like**.



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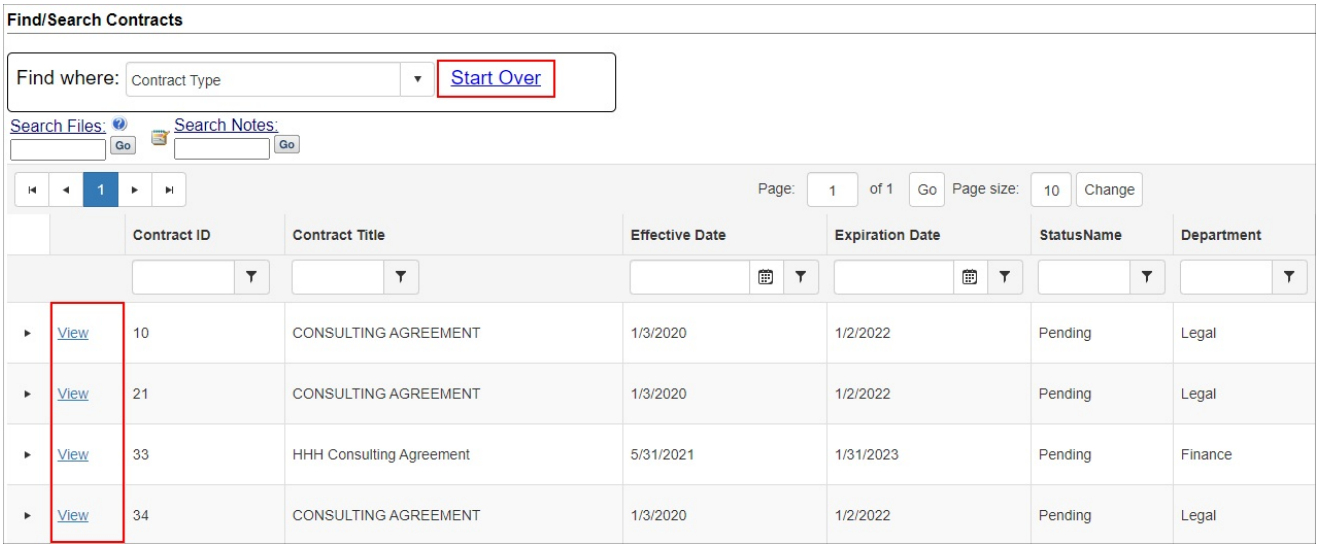
- For Date fields: enter/select (using the calendar icon) two dates between which to search the selected field where the **Date is Between**.



NOTE: If a **Find Where** field is selected, **View All** cannot be used. Click **Start Over** before clicking **View All**.

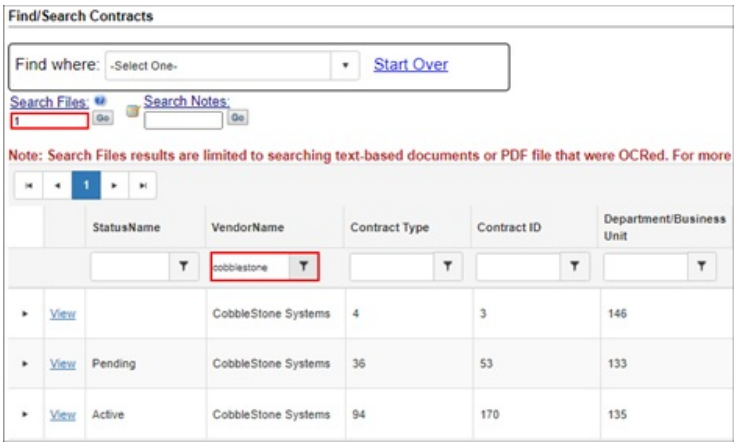
4. Click **Search** to display all Contract Records that match the search criteria entered.

5. To start a new search, click **Start Over** (to the right of the **Find Where** drop down menu).



The system is also able to maintain filters and sorts on the Contract Find/Search screen. After filtering the grid on the Contract Find/Search screen, the system will retain results when performing a secondary Search Files or Search Notes on the Find/Search Screen.

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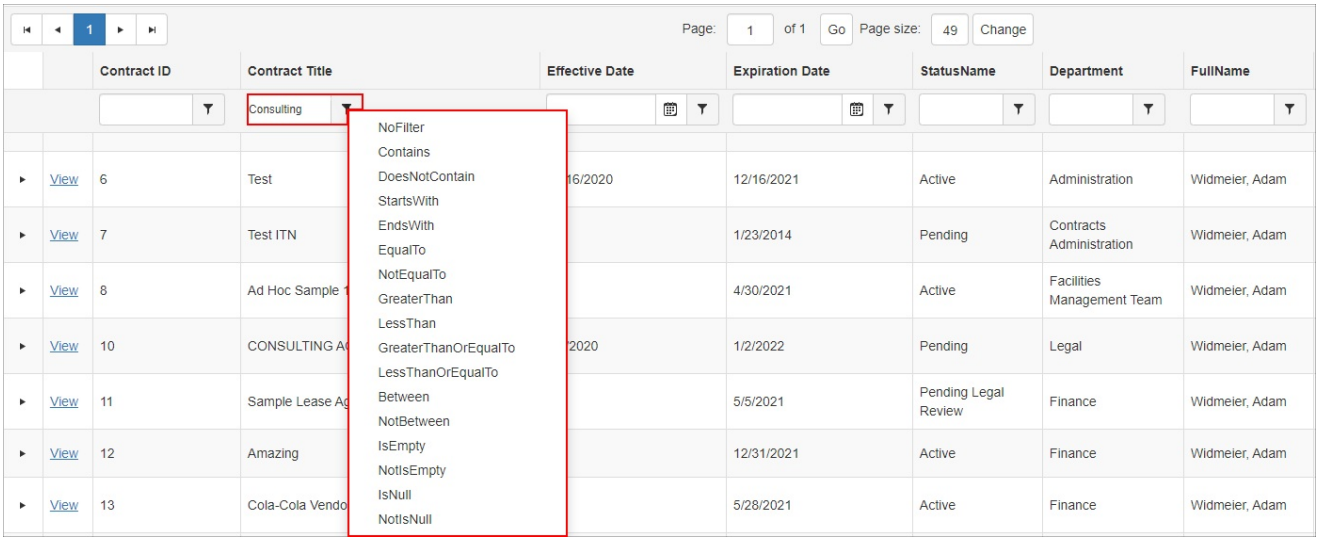
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Filtering & Sorting Find/Search Contracts List

Filtering & Sorting Find/Search Contracts List

Find/Search Contracts: Filtering & Sorting the Find/Search Contracts Screen

The **Find/Search Contracts** screen can be filtered by entering the filter criteria into the appropriate column's text box and then clicking the **filter** icon to determine how the displayed records are to be filtered based on the entered criteria.



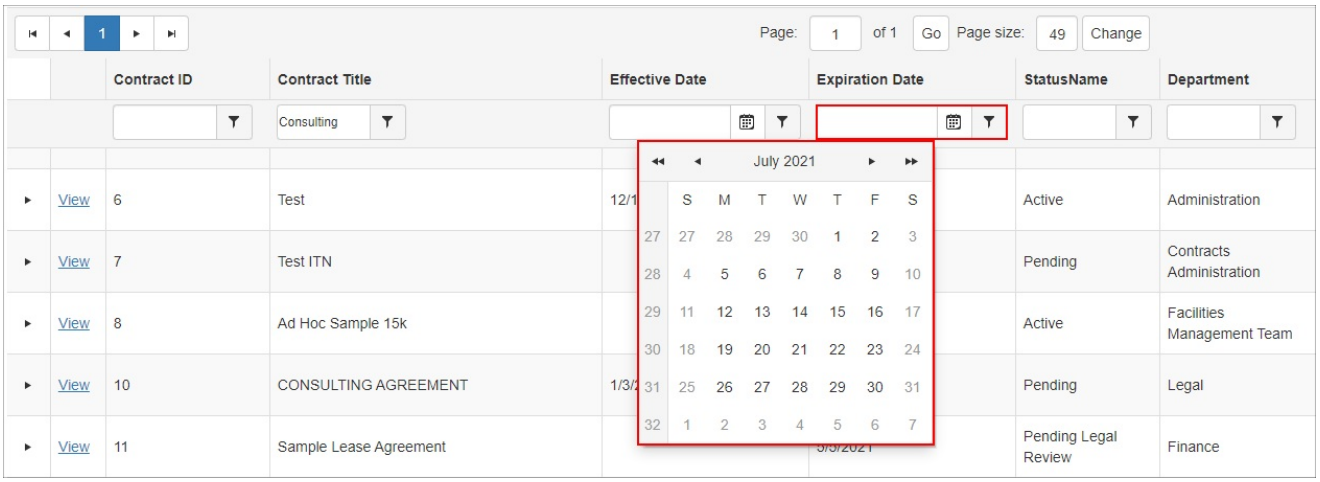
To filter from a date column

1. Click the **calendar** icon for the desired field.

2. Select the date from the calendar pop-up.

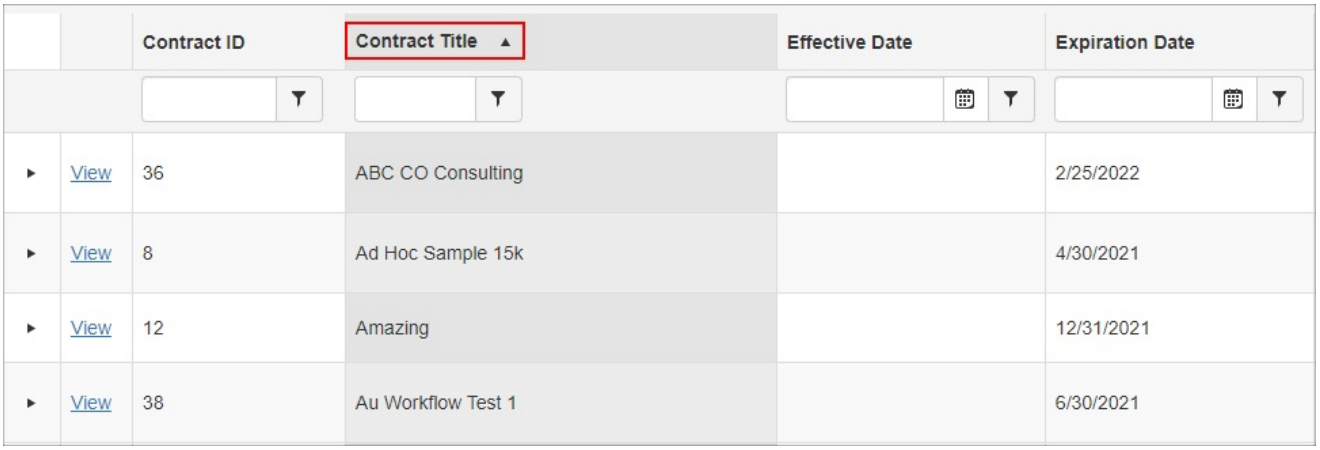
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3. Click the **filter** icon and select the filter criteria.



To remove a filter, click the **filter** icon and select the **No Filter** option.

Each column can be sorted as well by clicking the **column name** once to sort in ascending order, a second time to sort in descending order, and a third time to return the entries to the original sort order.



A system administrator can alter the fields visible on the report and their order by clicking **Manage Columns**.

To add fields to the search screen, click **Add** for the field on the right to be added. To remove an existing field, click **Remove** for the field on the left to be removed from those displayed.



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To modify the order, on the **Assign Columns to List screen**, drag and drop the fields into the desired order.



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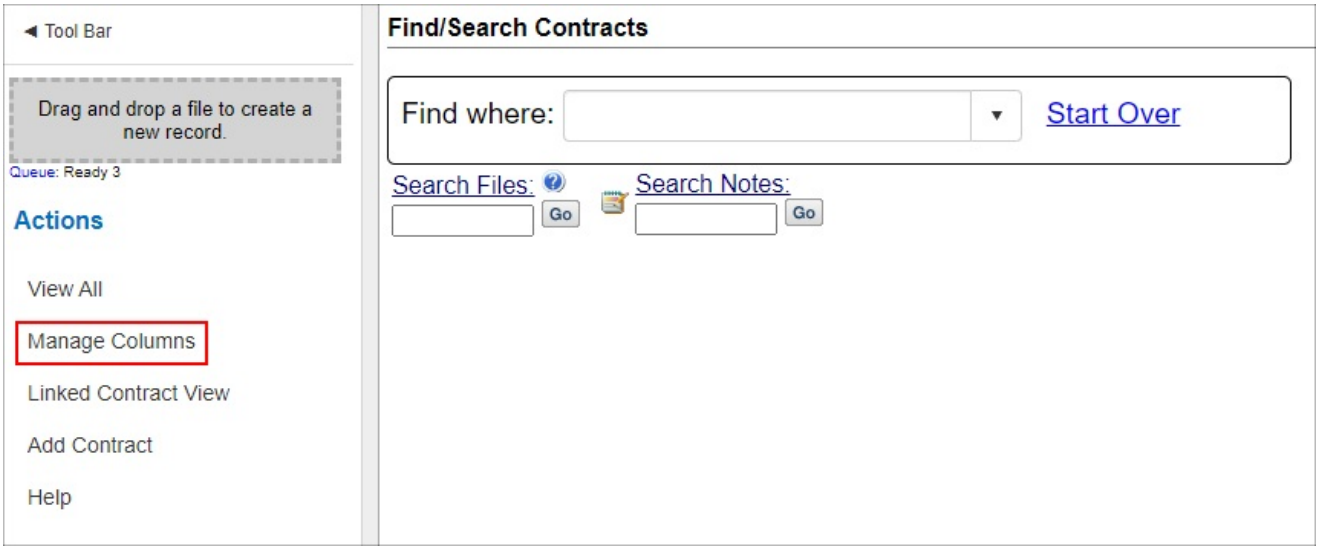
Modifying Columns Displayed

Modifying Columns Displayed

Find/Search Contracts: Modifying Columns Displayed

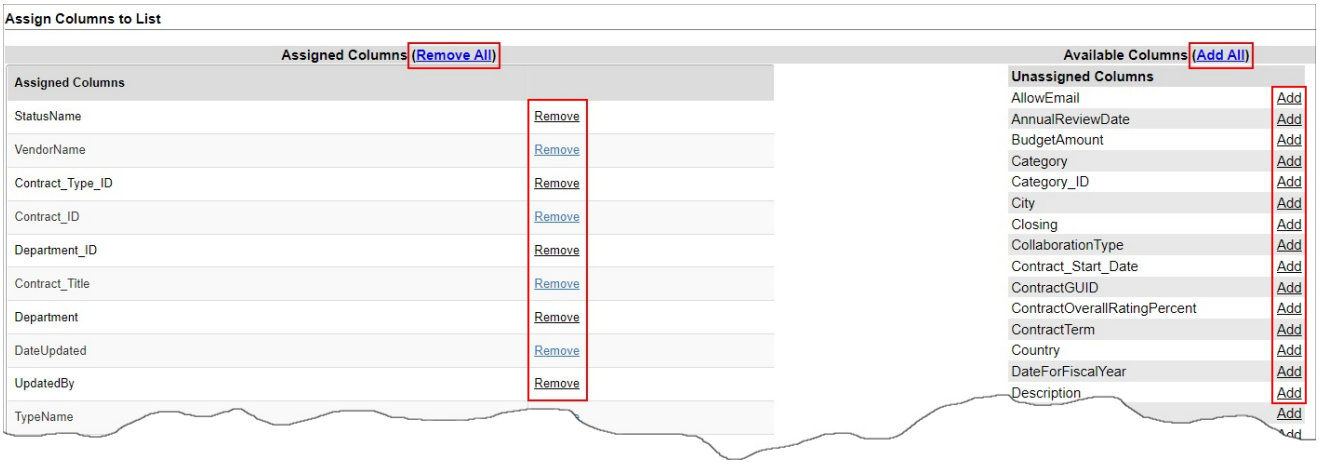
Modifying Columns Displayed in the Find/Search Contracts Screen

1. To modify the table columns that are returned upon searching contracts, click **Manage Columns** on the **Actions** menu on the **Find/Search Contracts** screen.



2. The **Assign Columns to List** screen displays.

3. To add a column to the table, select the column name from the **Available Columns** box and click the **Add** button. This adds the column to the **Assigned Columns** box. To add all columns to the table, click **Add All** next to Available Columns. This will assign ALL columns to the **Assigned Columns** box.



Note: The column names in the **Assigned Columns** box do not include the default columns already assigned.

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4. To remove a column from the **Assigned Columns** box, select the column name in the **Assigned Columns** box and click the **Remove** button. To remove all columns from the **Assigned Columns** box, click **Remove All.**

5. When finished adding/removing columns, click **Back to List** button under **Actions** on the side menu of the **Assign Columns to List** screen.

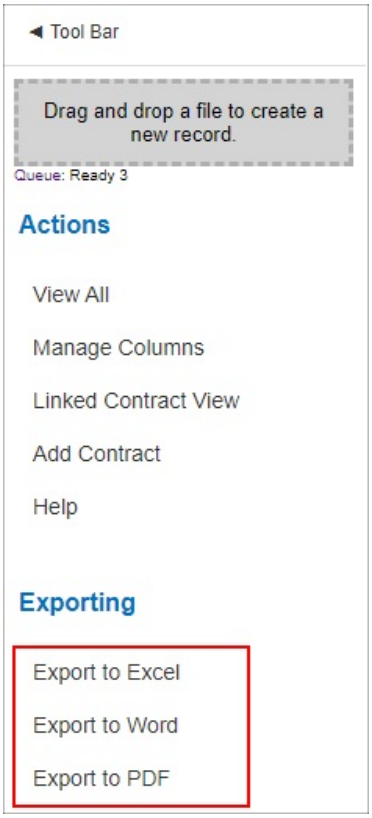
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Exporting Search Results

Exporting Search Results

Find/Search Contracts: Exporting the Find/Search Contracts Screen

The **Find/Search Contracts** screen can be exported as Excel, Word, or PDF files using the options under **Exporting** on the menu of the **Find/Search Contracts** screen. However, when the **Find/Search Contracts** screen is exported, the export will include all fields shown on the screen (including the **View** link, which is disabled upon exporting it).



Once the destination for the exported file has been selected, **Open** or **Save** the exported document.

It is recommended to first export to Excel, where a user can modify/customization to the grid and then save to as PDF file.

	A	B	C	D	E	F	G	H	I	J
1	Contract ID	Company	Department	Contract Title	Contract Type	FullName	StatusName	Expiration Date	Contract Amount	
2	494	1687 Foundation, The	Finance	Kelly's Business Agreement	45	zzzAguilara, Kelly	Active	1/19/2016	5	
3	497	3M Health Information Systems	Non Disclouser	Business Associate Agreement1	45	Morrotto, Nick	Active	12/8/2015	50000	
4	500	Abbott Laboratories, Inc.	Legal Department	Business Associate Agreement2	45	Adams, John	Active	5/12/2017	0	
5	512	ABC Corp	Legal	Business Associate Agreement 3	63	Adams, John			0	
6	1025	3M Health Information Systems	Non Disclouser	Business Associate Agreement1	45	Morrotto, Nick	Active	12/8/2015	50000	

Note: It is the user's responsibility to delete the **View** column in the exported file.

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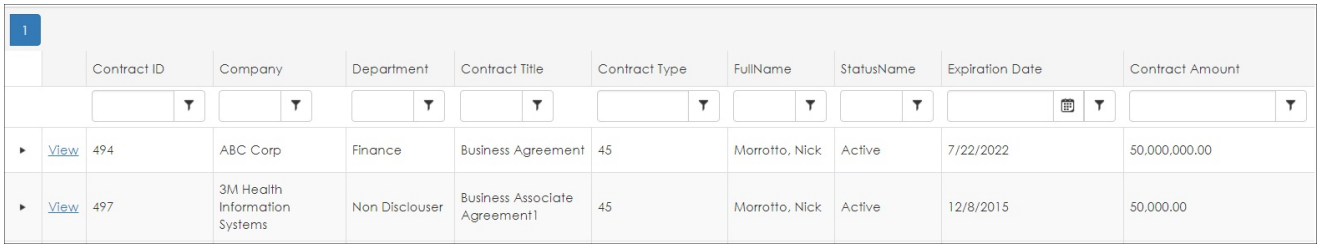
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View Contract Records/Files from Search

View Contract Records/Files from Search

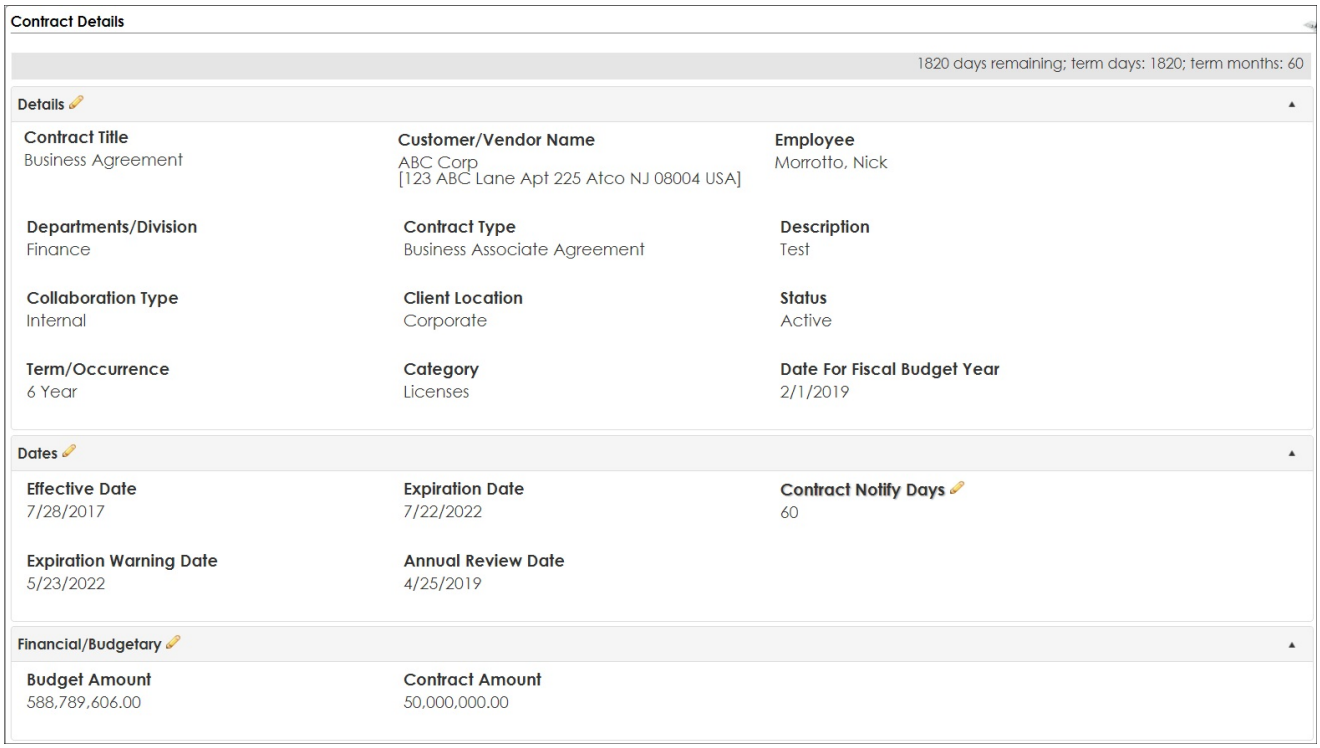
Find/Search Contracts: View a Contract Record from Search

To view a Record's **Contract Details** screen from the Find/Search Contracts search results list, click **View** to the left of the Contract ID for the Contract line item.



		Contract ID	Company	Department	Contract Title	Contract Type	FullName	StatusName	Expiration Date	Contract Amount
▸	View	494	ABC Corp	Finance	Business Agreement	45	Morrotto, Nick	Active	7/22/2022	50,000,000.00
▸	View	497	3M Health Information Systems	Non Disclouser	Business Associate Agreement1	45	Morrotto, Nick	Active	12/8/2015	50,000.00

The **Contract Details** screen for the Contract Record selected displays.



Contract Details

1820 days remaining; term days: 1820; term months: 60

Details

Contract Title Business Agreement	**Customer/Vendor Name** ABC Corp [123 ABC Lane Apt 225 Atco NJ 08004 USA]	**Employee** Morrotto, Nick
Departments/Division Finance	**Contract Type** Business Associate Agreement	**Description** Test
Collaboration Type Internal	**Client Location** Corporate	**Status** Active
Term/Occurrence 6 Year	**Category** Licenses	**Date For Fiscal Budget Year** 2/1/2019

Dates

Effective Date 7/28/2017	**Expiration Date** 7/22/2022	**Contract Notify Days** 60
Expiration Warning Date 5/23/2022	**Annual Review Date** 4/25/2019	

Financial/Budgetary

Budget Amount 588,789,606.00	**Contract Amount** 50,000,000.00

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View a Record's Files/Attachments from the Search Results List:

Once a search on the **Find/Search Contracts** screen has been completed, a user can quickly view a Contract Record's Files/Attachments that have been attached/linked to the record.

Click the ► caret to the left **View** link for the Contract Record line item to expand a list of the Files/Attachments.



▼	View	2	Lease Agreement	2/1/2021	9/30/2021	Declined	Administration	Widmeier, Adam

Files/Attachments

Actions	File Link	File Description	Date Created
Preview	CONSULTING AGREEMENT.docx		6/10/2021

To view a file/attachment in the list, click the File Name and select to **Open** or **Save** the file.

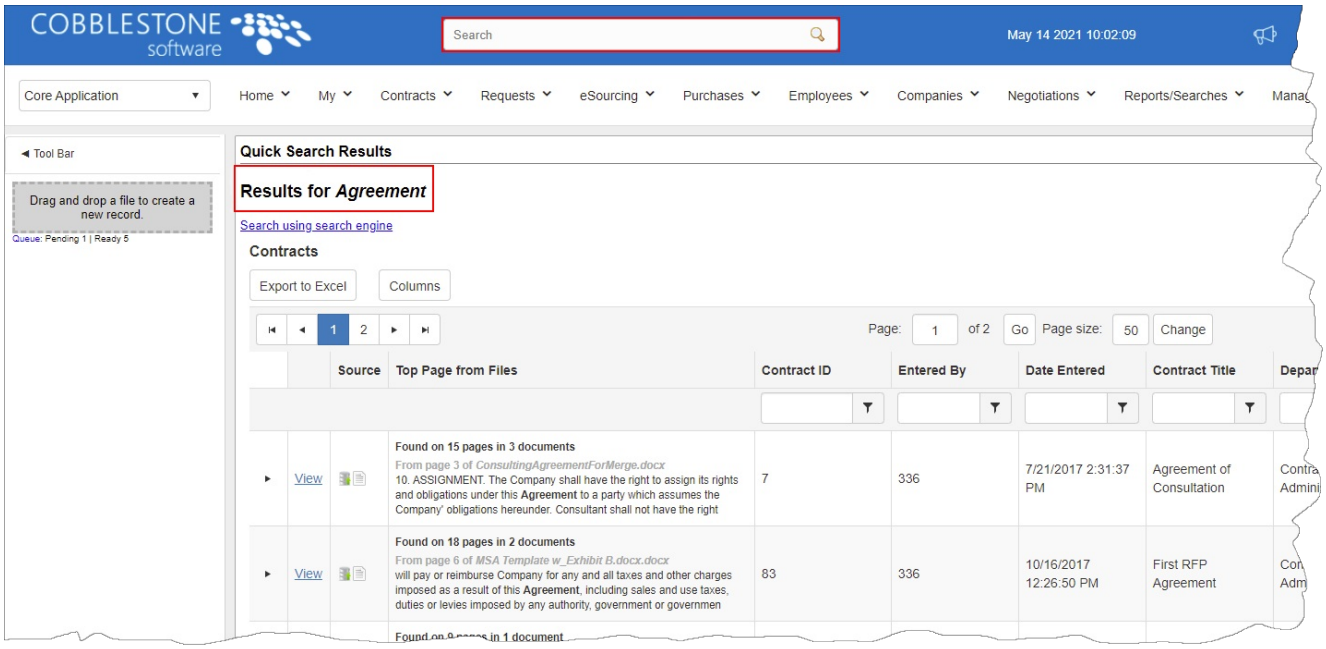
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Performing a Quick Search

Performing a Quick Search

Quick Search: Performing a Quick Search

Contract Insight allows users to search and report based on any keyword, date, or number in standard and user-defined fields using the **Quick Search** tool. **Quick Search** is a google-like search tool where a user can enter a string and receive results of all Contract Records within the Contract Insight system that contains the search criteria. The **Quick Search** function is located on the menu under **Quick Search**.



Use the Quick Search tool

1. Enter the search criteria into the Quick Search text box and click **the Magnifying Glass icon** or press **Enter**.
2. Contract Insight will search for all records matching the data you entered.

Note: Quick Search is a wildcard text search against all Contract Record fields in the Contract Details screen.

Quick Search Results

Results from a quick search contain substantial information.

A. Click the carat on the left to view a list of all attachments on the record.

B. Click View to navigate to the record's details page.

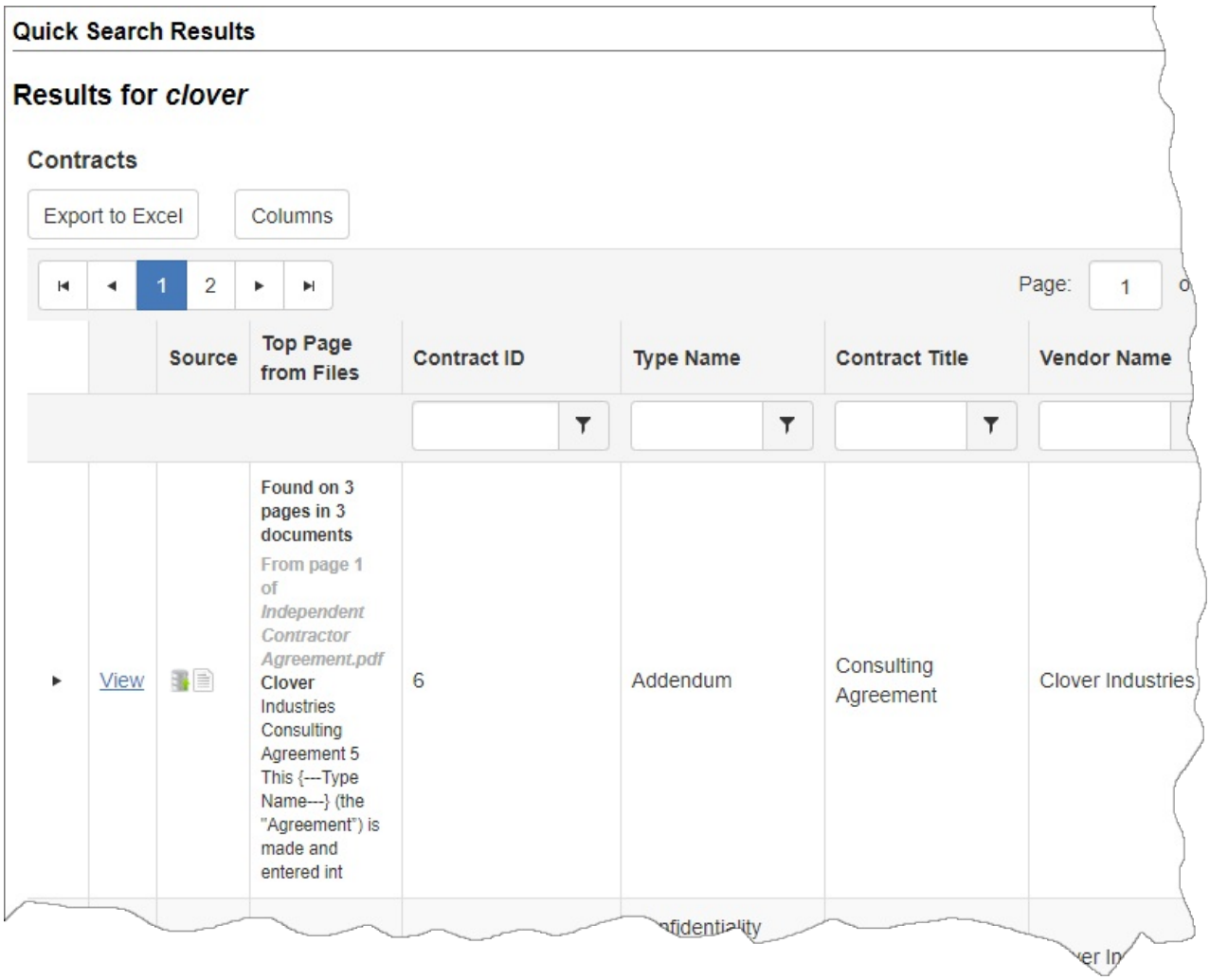
C. The icons represent results from the record data and from the attachment(s)

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File Search Results

When a quick search result is found in a document, a portion of the document displays to help guide the user to the correct document and the location within.



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Filtering & Sorting the Quick Search Results List

Filtering & Sorting the Quick Search Results List

Quick Search: Filtering & Sorting the Results Screen:

The Quick Search screen can be filtered by entering the filter criteria into the appropriate column's text box and then clicking the **filter** icon to determine how the screen will be filtered based on the entered data.



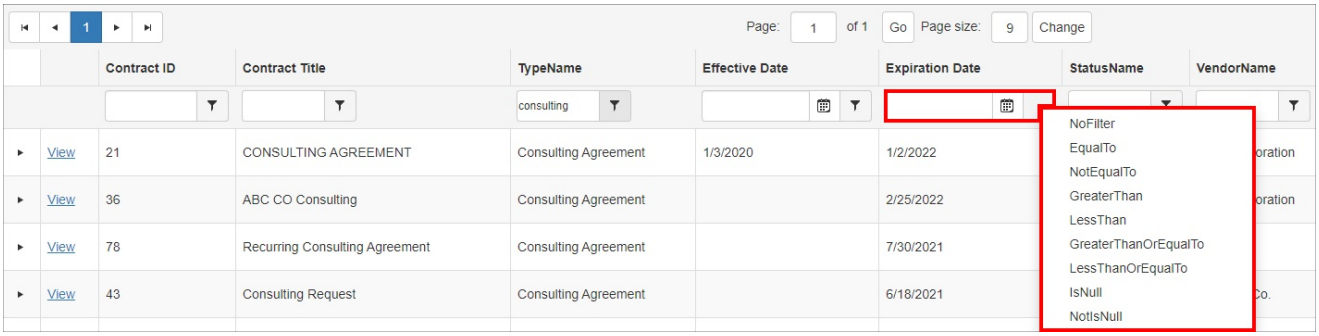
To filter from a date column

1. Click the **calendar** icon for the desired field.

2. Select the date from the calendar pop-up.

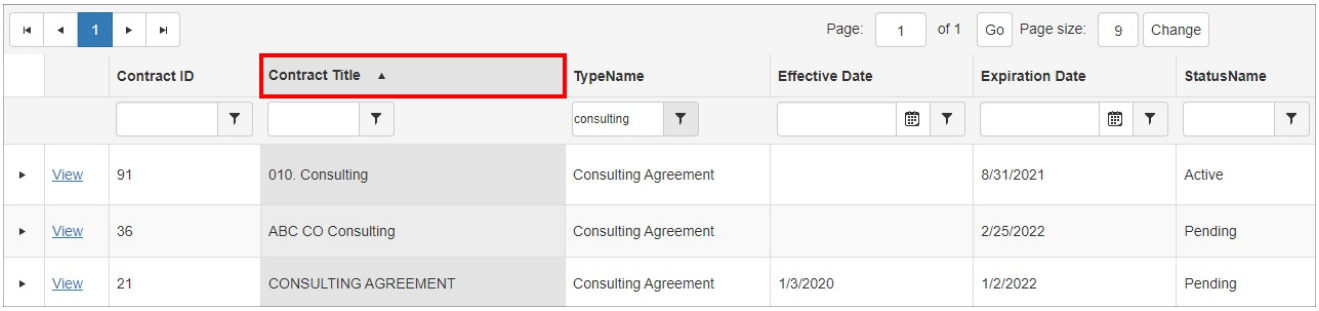
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3. Click the **filter** icon and select your filter criteria.



To remove a filter, click the **filter** icon and select the **No Filter** option.

Each column can be sorted as well by clicking the **column name** once to sort in ascending order, a second time to sort in descending order, and a third time to return the entries to the original sort order.



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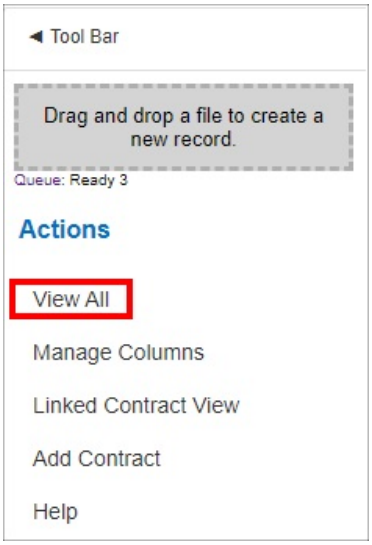
Modifying Columns Displayed

Modifying Columns Displayed

Quick Search: Modifying Columns Displayed

Modifying Columns Displayed in the Quick Search Screen

1. To modify the table columns that are returned upon searching contracts, click **Manage Columns** link on the **Actions** menu on the **Quick Search** screen.



2. The **Assign Columns to List** screen displays.

3. To add a column to the table, click **Add** next to the column name from the **Available Columns** box. This will add the column to the **Assigned Columns** box.



Note: The column names in the **Assigned Columns** box do not include the default columns already assigned.

4. To remove a column from the **Assigned Columns** box, click **Remove** next to the column name in the **Assigned Columns** box.

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5. When finished adding/removing columns, click **Back to List** button under **Actions** on the side menu of the **Assign Columns to List** screen.

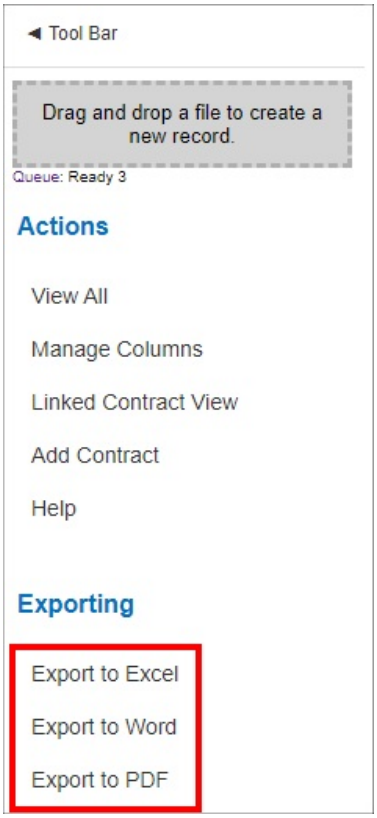
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Exporting the Quick Search Results List

Exporting the Quick Search Results List

Quick Search: Exporting the Find/Search Contracts Screen

The **Quick Search** screen can be exported as Excel, Word, or PDF files using the options under **Exporting** on the menu of the **Quick Search** screen. However, when the **Quick Search** screen is exported, the export will include all fields shown on the screen (including the **View** link, which will be disabled upon exporting it).



Selected the destination for the exported file and select to **Open** or **Save** the exported document.

It is recommended to first export to Excel, where you are able to make modifications/customizations to the grid and then save to a PDF file.

	A	B	C	D	E	F	G	H	I	J
1	Contract ID	Company	Department	Contract Title	Contract Type	FullName	StatusName	Expiration Date	Contract Amount	
2	494	1687 Foundation, The	Finance	Kelly's Business Agreement	45	zzzAguilara, Kelly	Active	1/19/2016	5	
3	497	3M Health Information Systems	Non Disclouser	Business Associate Agreement1	45	Morrotto, Nick	Active	12/8/2015	50000	
4	500	Abbott Laboratories, Inc.	Legal Department	Business Associate Agreement2	45	Adams, John	Active	5/12/2017	0	
5	512	ABC Corp	Legal	Business Associate Agreement 3	63	Adams, John			0	
6	1025	3M Health Information Systems	Non Disclouser	Business Associate Agreement1	45	Morrotto, Nick	Active	12/8/2015	50000	

Note: It is the user's responsibility to delete the **View** column in the exported file.

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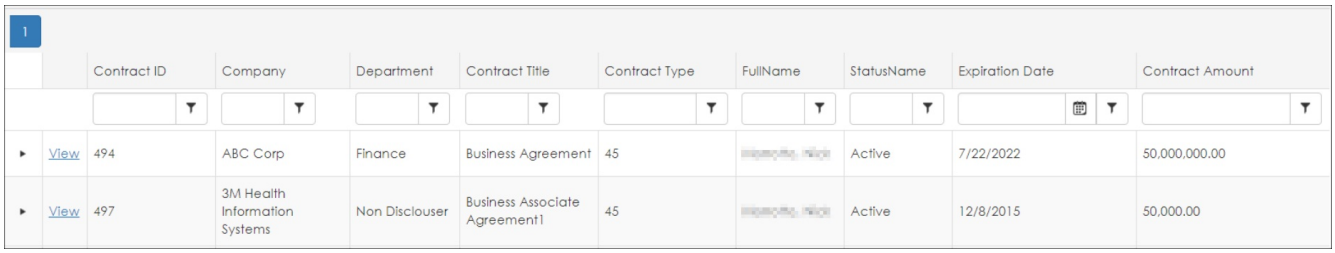
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View Contract Record & Attachments from Search

View Contract Record & Attachments from Search

Quick Search: View a Contract Record from Search

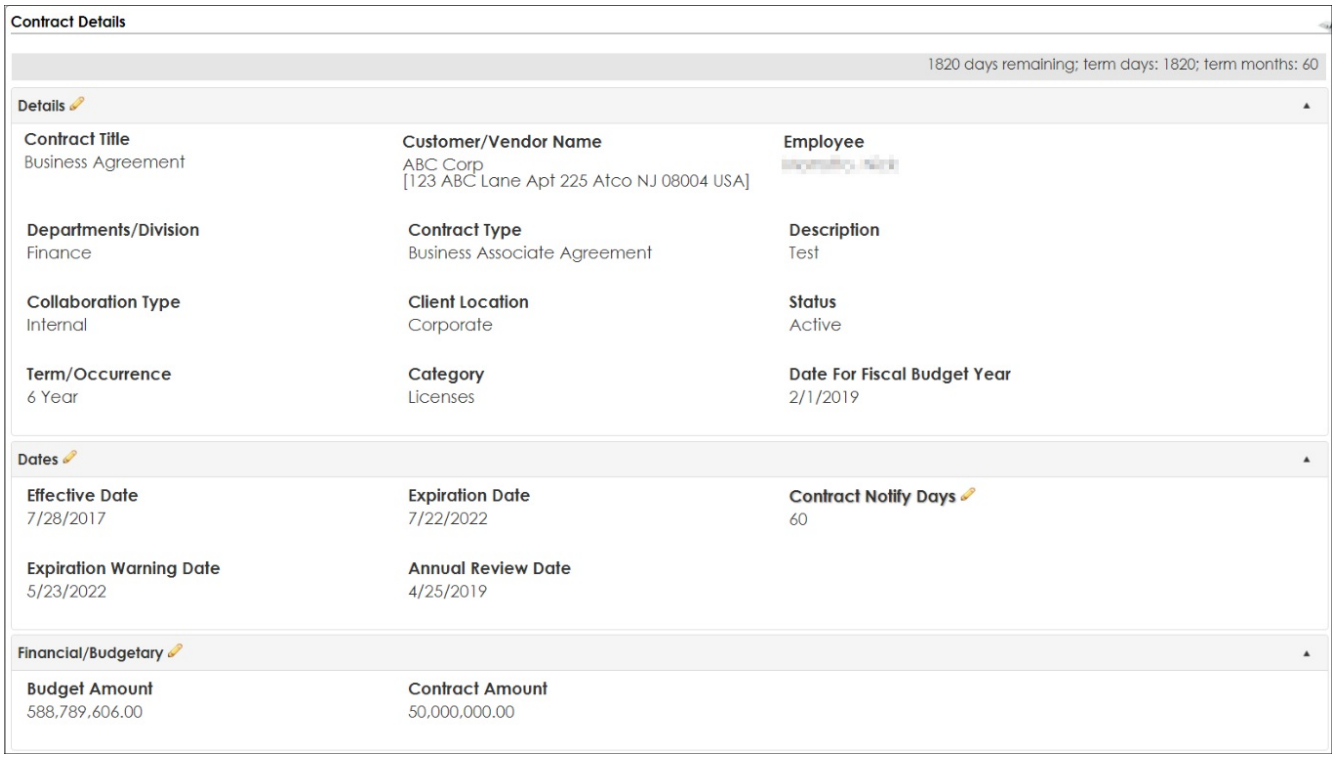
To view a Record's **Contract Details** screen from the Quick Search search results list, click **View** for the Contract line item.



		Contract ID	Company	Department	Contract Title	Contract Type	FullName	StatusName	Expiration Date	Contract Amount
▸	View	494	ABC Corp	Finance	Business Agreement	45	[redacted]	Active	7/22/2022	50,000,000.00
▸	View	497	3M Health Information Systems	Non Disclouser	Business Associate Agreement1	45	[redacted]	Active	12/8/2015	50,000.00

This will open the **Contract Details** screen for the Contract Record selected.

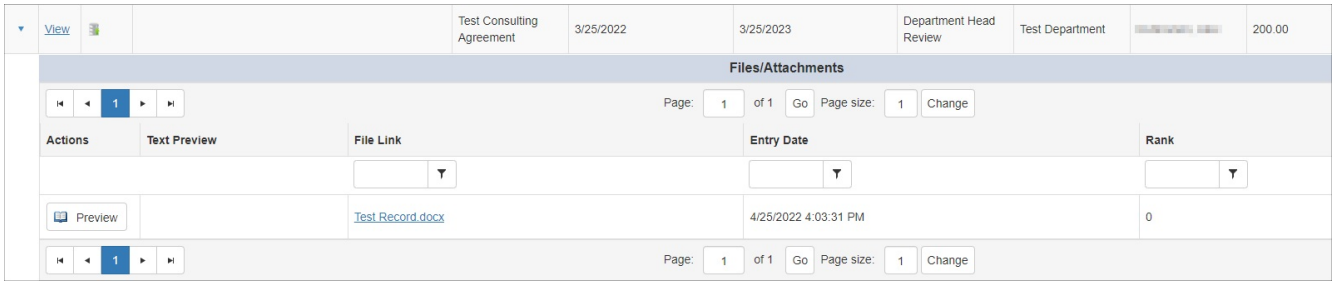
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View a Record's Files/Attachments from the Search Results List:

Once you have performed a search on the **Quick Searches** screen, you are able to quickly view a Contract Record's Files/Attachments that have been attached/linked to the record.

Click the ► caret to the left **View** link for the Contract Record line item for which to expand a list of the Files/Attachments.



To view a file/attachment in the list, click the File Name and select to **Open** the file or **Save** the file.

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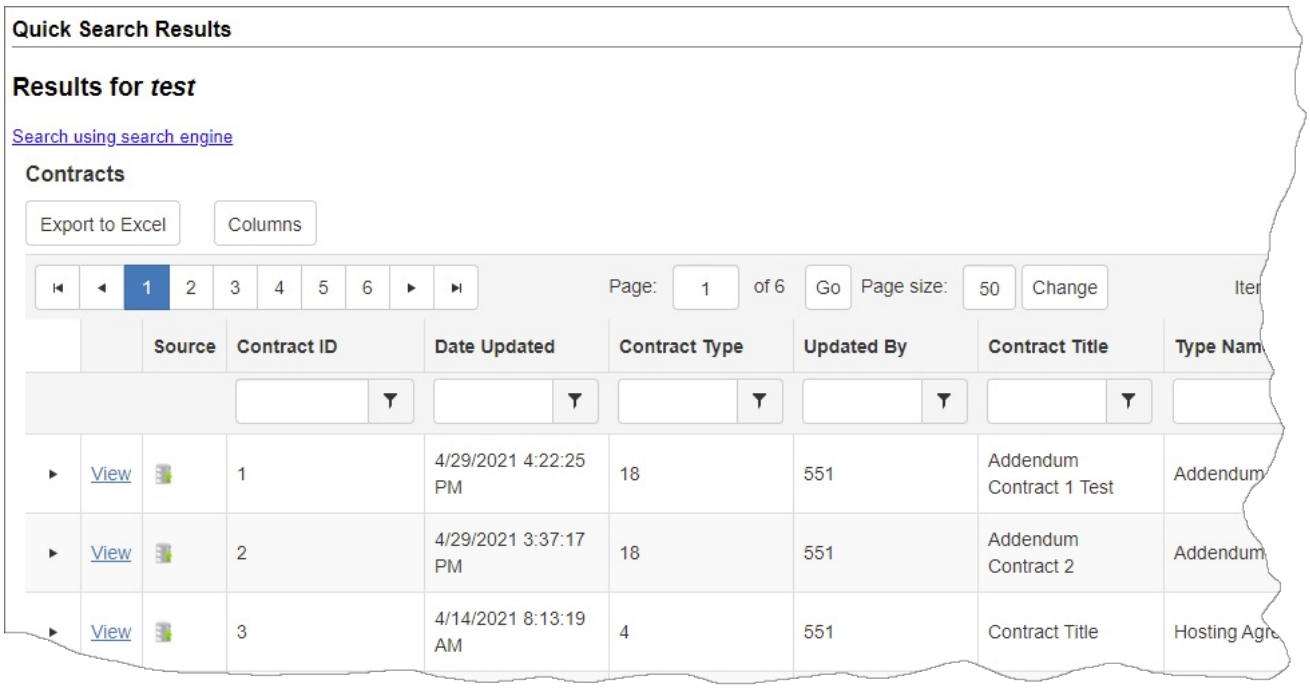
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Searching with the Search Engine

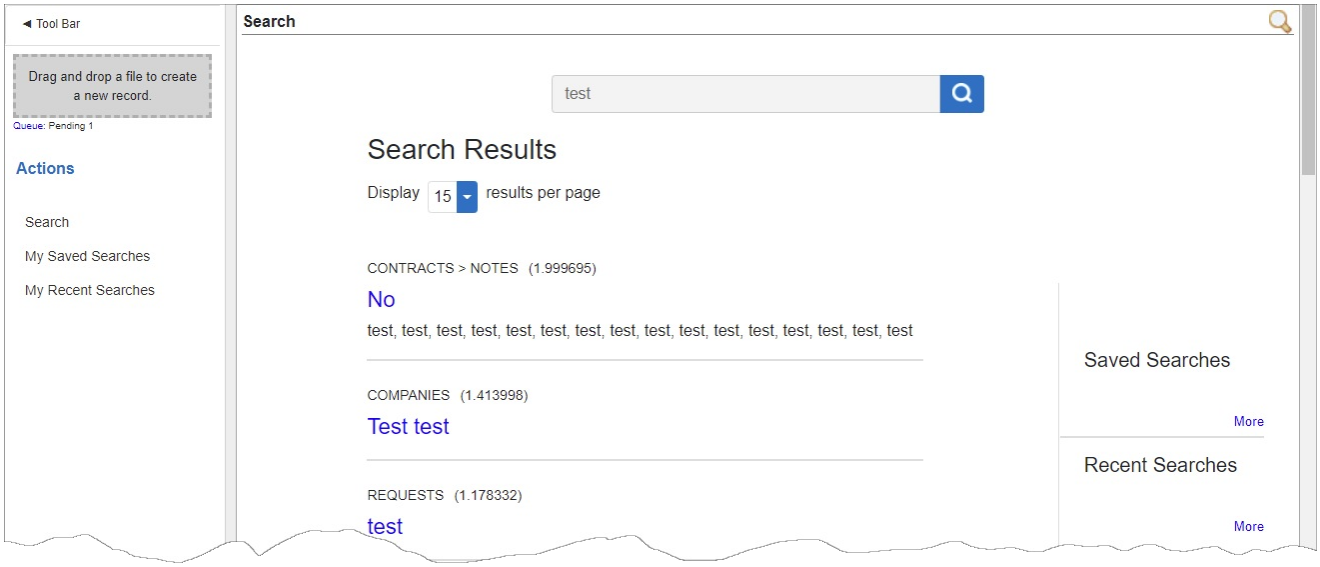
Searching with the Search Engine

Searching with the Search Engine

CobbleStone's search options continue to be built upon to fit the demands of all users. Not only may users utilize the Quick Search option, but now they may also use the **Search Engine** functionality. This **Search Engine** looks for the entered term in records, files, tables, and subtables, returning results based on relevancy rather than by area. This also allows users to save the searches they perform often as well as their recent searches.



Listed here are different places within the system where "test" is found.



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After configuring the **Search Engine**, this gives us a more enhanced search, letting users know that not only did the system find “test”, but it found it across multiple areas such as Contracts, Companies, and Requests.

NOTE: Quick Search can be replaced with the **Search Engine** based on system configuration.

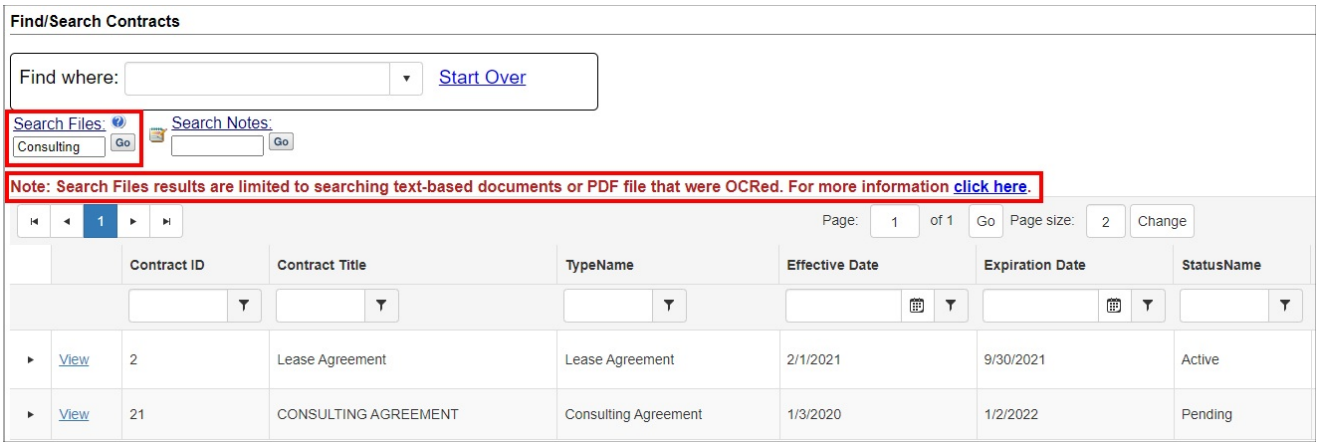
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Search Contract Files

Search Contract Files

Search Files/Notes: Search Files

The **Search Files** text box is located at the top of the **Find/Search Contracts** screen.



Search Files

Contract Insight enables its users to search through contract record's text-based files/attachment using keywords.

1. To do so, enter a keyword you would like to look for in the **Search Files** text box and click **Go**.

2. The results displayed will be any contract records that have a text-based file attached that contains the keyword entered.

NOTE: When searching for multiple keywords via **Search Files**, **quotes** should not be used. Also, note that search operators for **Search Files** are limited to AND and NEAR.

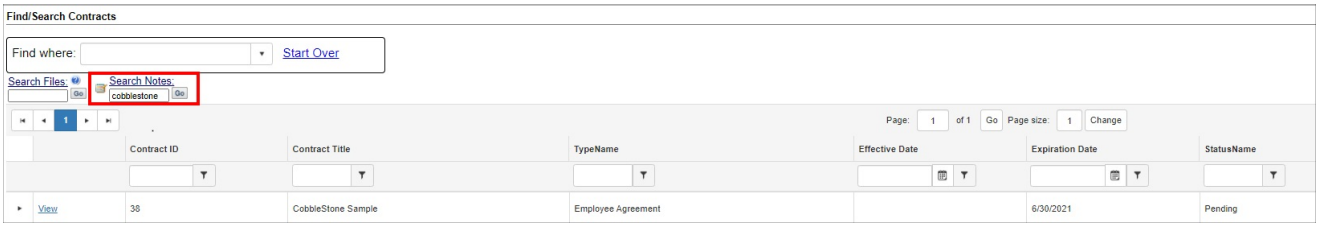
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Search Contract Notes

Search Contract Notes

Search Files/Notes: Search Notes

The **Search Notes** text box is located at the top of the **Find/Search Contracts** screen. **Search Notes** searches all notes stored in the **Notes Repository** section of the **Contract Details** screen.



Search Notes

Contract Insight enables its users to search though a contract record's notes using keywords.

1. To do so, enter a keyword you would like to search via **Search Notes** and click **Go**.

2. The results displayed will be any contract records that have a note saved to them that contains the keyword for which you searched.

NOTE: **Search Notes** is strictly a text wildcard search only for the provided word, phrase, and/or characters.

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Advanced File Search

Advanced File Search

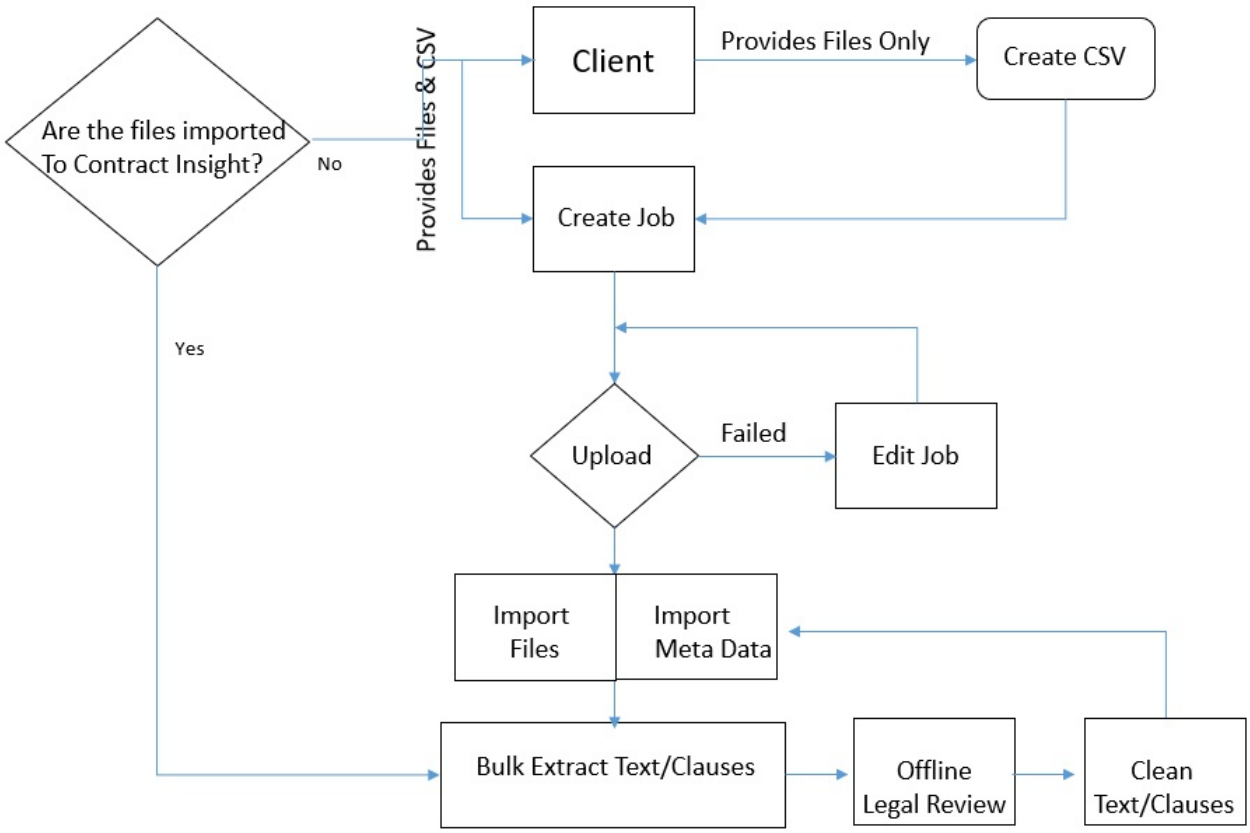
Bulk Text Extraction and File Migration Tool

Challenge: Many of CobbleStone's customers have numerous legal and contract documents that may or may not have been cataloged well or entered into a database to be tracked and searched. The task of extracting data fields, text, and clauses may be an arduous one. In many cases, help streamlining the data extraction process is required. Typical data that are requested to be extracted include but are not limited to: customer/vendor (counterparty) name, address, city state, zip, contract effective date, contract expiration, title, and contract owner (legal professional) name. For more advanced projects, extraction of clauses and terms may pose a challenge. Image if many files are in a folder system or network file system. It may be difficult to locate a contract document and/or analyse the data from the spreadsheet (data) to the actual contract document/file.

Cobblestone offers a combination of services and software tools to help with the extraction of metadata and clause text from files and bulk importing the files and metadata to Contract Insight. These tools in include, **Bulk File Migration Tool**, **Bulk Text Extraction**, **Data Import Tools** for metadata import and update, and **Batch Contract Entry**.

In this section, we will cover the **Bulk File uploader tool** (available via professional services from Cobblestone) and the **Bulk Text Extraction tool** (available within the Contract Insight Enterprise Software application).

A typical bulk extraction process includes the following activities:



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Bulk File Importer Tool

The Bulk File Importer was designed to CobbleStone personal via professional services the ability to bulk upload files to a client's Contract Insight Enterprise Software SaaS database without requiring direct access to the database server. The bulk file importer process is discussed separately in this documentation wiki.

Bulk Text and Clause Extraction

The steps below focus on the extract text and clauses from contract documents after the files have been imported to Contract Insight Enterprise. This process requires the Enterprise Edition, text-based files imported to the Contract repository, good quality text in the documentation, administrative access, and having the OCR tool enabled.

1. Log into the system as a System Admin User.

2. Navigate to **Report/Searches - Risk Analysis - Risk Mitigation Tools**.

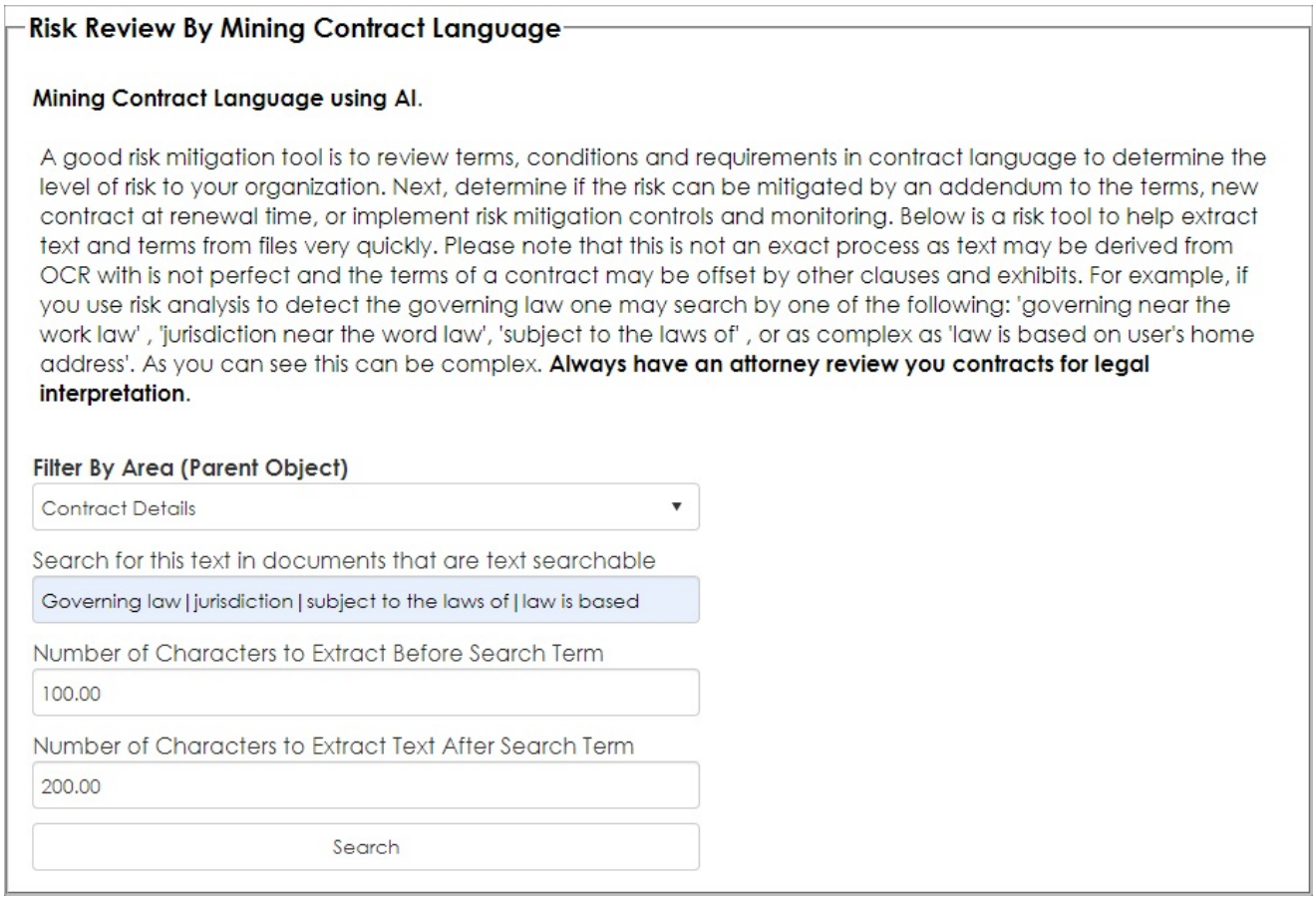


3. Select the **Risk Review with Mining Contract Language** option. This is used to perform bulk text extraction from text-based documents.



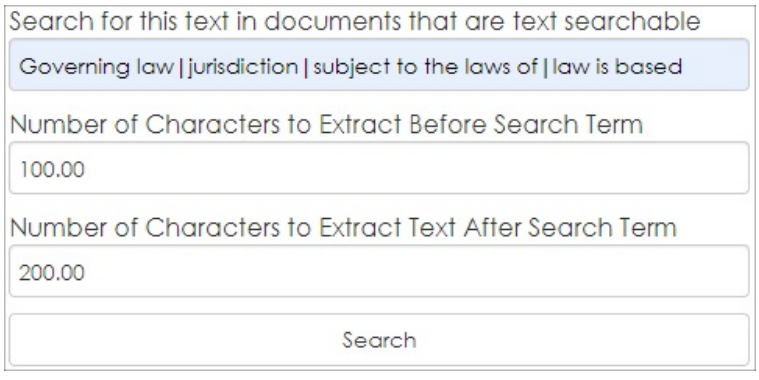
4. The **Text Extraction Tools** screen appears as seen below. Select the **Parent Object**. In this case we are extracting text from files on the Contract records area, so we selected Contract Details.

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5. Tell the engine what text or phrases you are searching for and how many characters to extract from the left of the found text to the right of the fond text or phrase. In this example ware are searching for governing law, jurisdiction, subject to the laws of, and law is based as our search text-phrase seen below. Separate the search terms-phrases with the pipe character (**|**).

We entered 100 for the number of characters to extract before the found term and 200 characters for the number characters to extract after the found term (if the term or phrase is found).



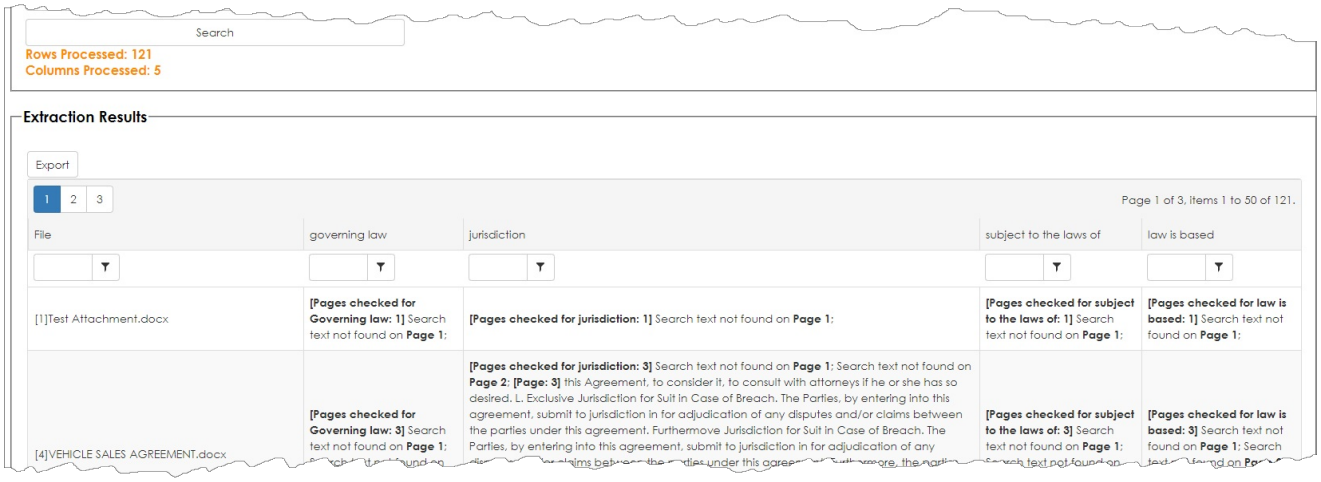
6. Click **Search**.

The system attempts to search the files attached to contract records that have text in the document.

Note: it is important that the files uploaded are text based or have been OCRed to a good quality as text recognition, OCR, and search is not exact. Characters, scanned images, orientations, spacing, font, quality, line separators, and other factors may impact results.

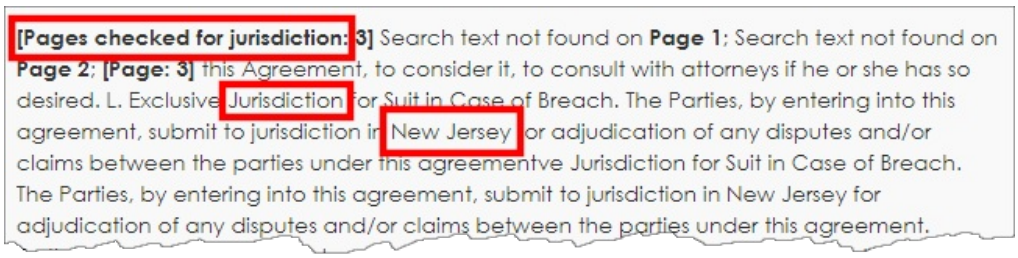
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The engine looks at each text document, searched text if text is found, search each page, try to match the search terms or phrases, try to extract the text, and output a column for each text/phrase searched and the results of what was found. If the text extracted is too limiting, broaden the search terms and phrases and search again as typically several passes may be needed.

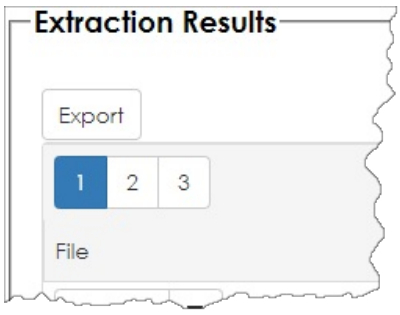


The engine attempts to identify the pages search, if text is found and results. If no text is found, this is indicator to manually review the document as the engine or document did not find text. This is helpful as the legal review team can easily review and determine what the laws may be applicable for this example.

Note: not all results are perfect; an attorney should be retained to perform legal review of legal documents.



Optionally, the user may export the results to Excel. This is useful to clean up the extracted text, send it for legal review, and potentially be used to re-import the data back into Contract Insight.



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Below are some sample rows where the bulk extract engine did not have access to the searchable text. Some causes may be the file is an image document and text not searchable, the OCR engine could not OCR, the document is of poor quality or orientation, the files are locked, the files are password protected, the file is corrupted, etc. Each situation is unique and will require legal review by an attorney.



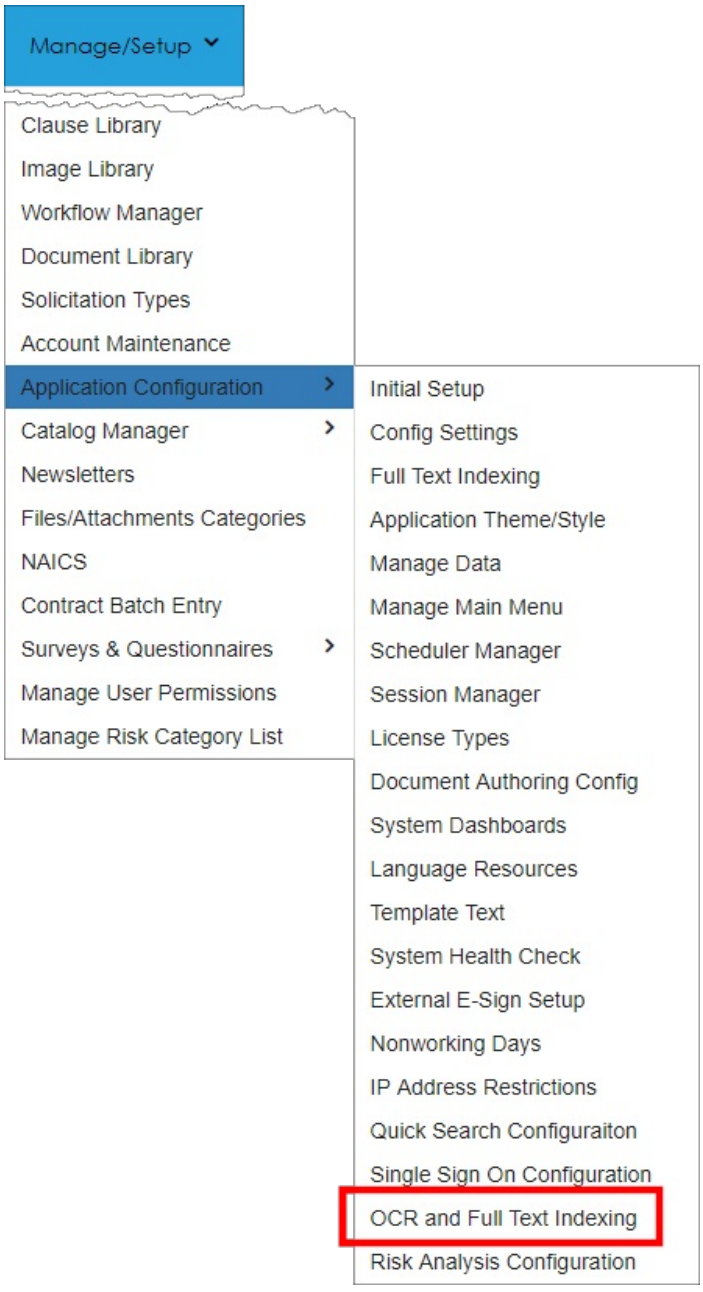
Summary

Data mining and bulk extraction of document text, terms, conditions, and contract language may be useful as good risk review tool. Be aware that this process is not perfect and to use an attorney and your best judgement for each process.

Enable to the OCR Scheduler

Ensure the OCR engine is enabled. To help with text recognition and as required, ensure the OCR engine is enabled and running via the **Application Configuration - OCR and Full Text Indexing engine** menu item. Check with your Cobblestone representative for more information.

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Contracts Overview

Contracts Overview

Contracts Overview

Contract Insight provides many options and functionality for creating and managing contracts. You can access the **Contracts** section of Contract Insight via the **Contracts** top navigation menu. There are several different options of how to access Contracts depending on what actions you would like to take. Clicking **Contracts** on the top navigation menu option will cause a drop down list to appear, which will provide you with several options for adding, viewing, and searching contracts.

The following links will provide you with detailed instructions for Adding, Editing, and Managing your Contract Records:

Adding a Contract Record

Find/Search Contracts

Managing/Editing a Contract Record

Contract Attachments

Attachment Check-In/Check-Out

Contract Tasks Overview

Add Company to Contract

Assign Departments to Contract

Assign Employees to a Contract

Assign Locations to Contract

Contract Notes & Comments

Contract Checklists & Milestones

Contract Price/Cost Schedule

Contract Financials

Copy a Contract Record

Link Contracts

Contract Company Information

View Vendor/Client Ratings

View Contract History

Contract Record Alerts

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Contracts Record Alerts

Contract Record Alerts

Contracts Overview: Contract Record Alerts

Contract Record Alerts are sent out to the **Assigned Employee**, or the Employee assigned as the Contract Administrator, as well as any additionally assigned Employees for the Contract Record. Alerts will be sent in two forms: as a **My Calendar** link on the calendar date of the alert and as an Email notification.

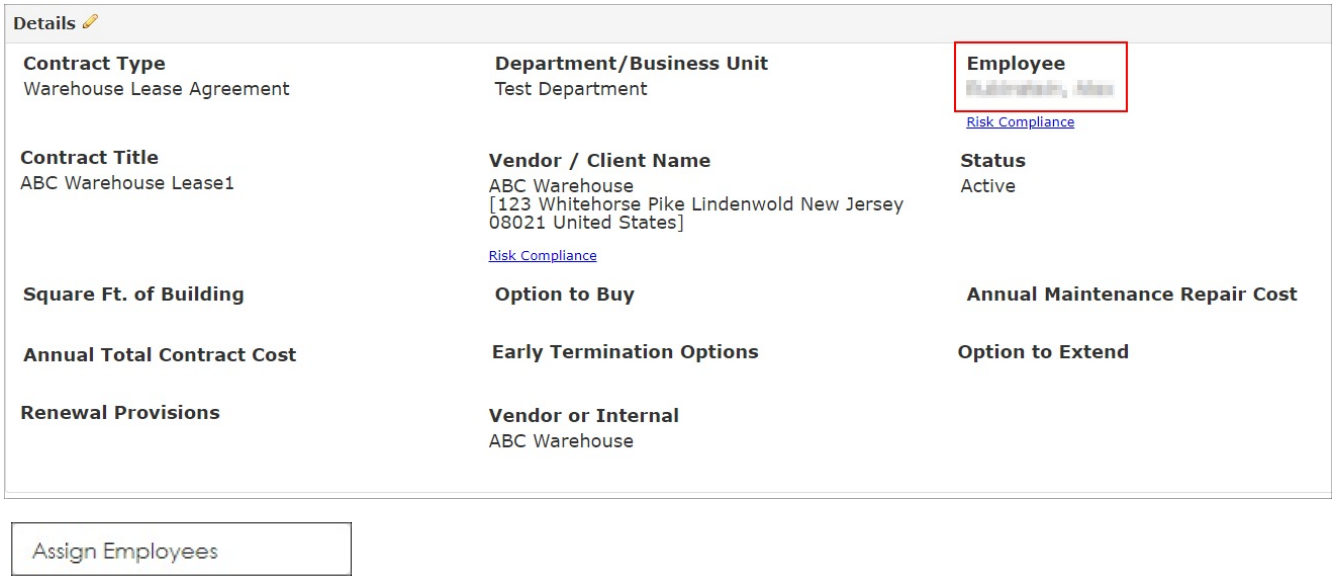
Alerts are based on:

1. The **Contract End/Expiration Date** Field

2. The **Notify Days** Field



An alert is sent out the number of days entered into the **Notify Days** field before the **Contract End/Expiration Date**. to the employee primarily assigned as well as any additionally assigned employees.



Example: If a user enters a Contract End/Expiration Date of '12/31/2015' and a **Notify Days** value of thirty (30), the system will e-mail the Employee Assigned as well as any additionally assigned Employees for the Contract Record on 12/1/2015 (12/31/2015 minus 30 days).

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The **Expiration Warning Date** is the auto-calculated date on which the **Notify Days** alert will be sent.

Note: If the **Expiration Warning Date** field is not populated, but there is a **Notify Days** value entered, the Notify Days alert will still be sent out.

Note: There will only be one notification sent out between the **Notify Days** and **Expiration Warning Date** alert fields, as they are the same alerts.

3. The **Annual Review Date** field will send out an alert on the date entered into the field.

Note: For e-mails to be routed successfully please have an Application Administrator Technician verify the following:

1. The employee's e-mail address is correct in the **Employee Manager** screen
2. The T**ask End Date** and/or **Notify Days** (less than the task end date) is future dated
3. Your organization's internal e-mail system is not blocking e-mails from the cobblestonesystems.com domain (or blocking emails from the internal server).
4. The task e-mailer job is properly configured and scheduled to run at least daily (or better).

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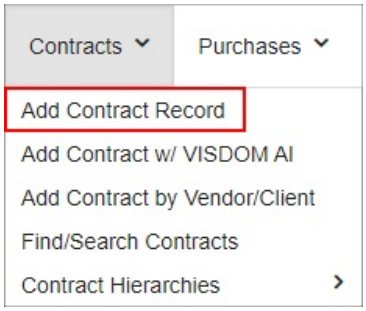
Add a Contract Record

Add a Contract Record

Add a Contract Record

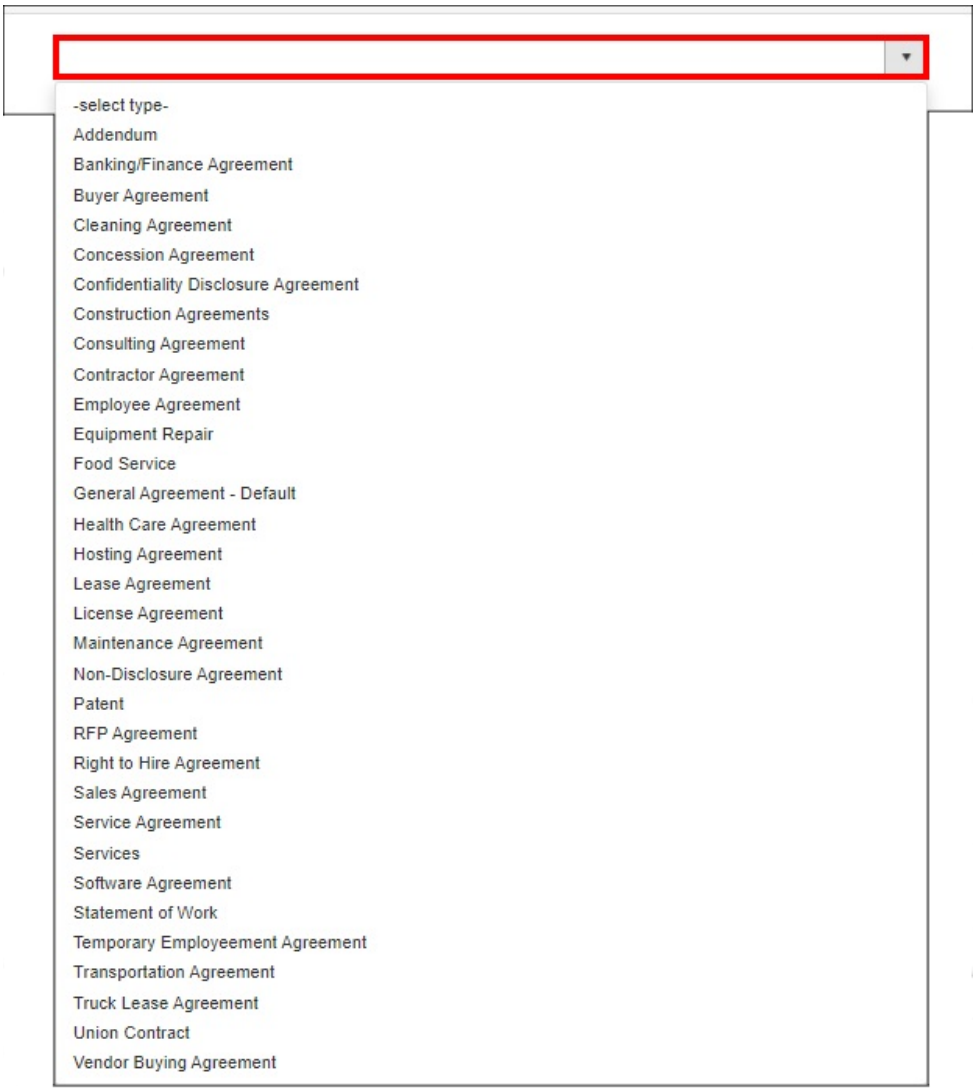
Before adding a contract into the Contract Insight system for the first time, it is best to verify with the Application Administrator that all departments, vendors, employees, locations, contract types, and status values have been entered.

1. To add a contract into the system, go to the top navigation menu and click **Contracts**. From the **Contracts** menu, click **Add Contract Record**.



2. The **Add New Contract Record** screen displays. From this screen, you can choose from a drop down list what **type** of contract you would like to add. After selecting the **type** of contract to add, select **Continue**.

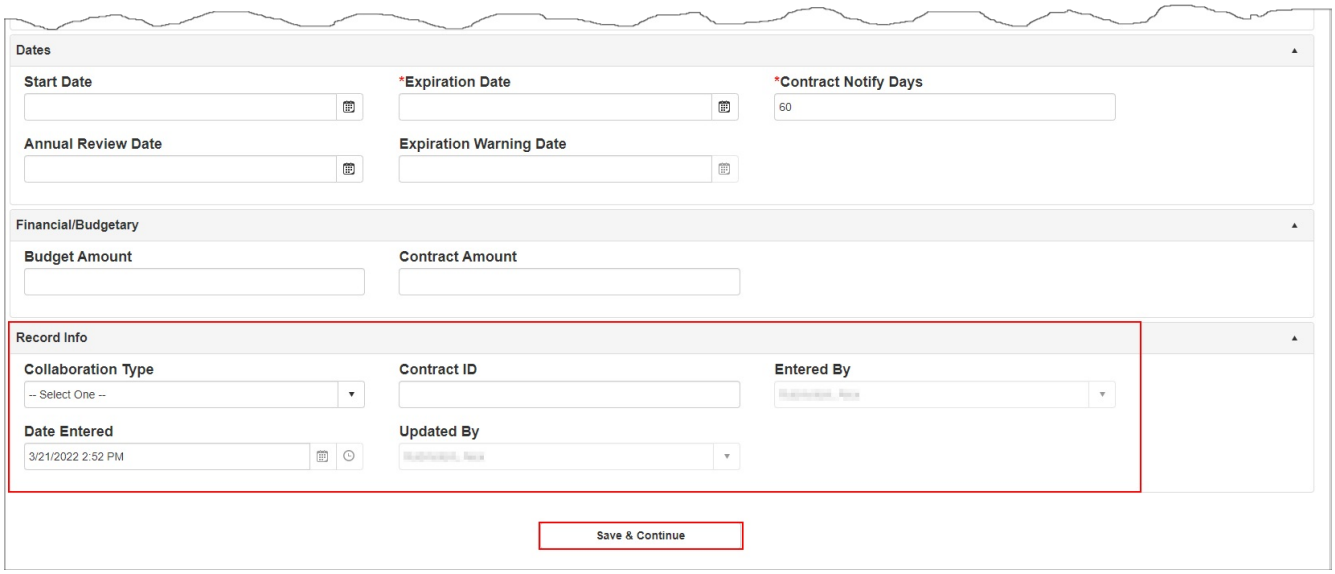
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Note: Depending on the contract type you select to create, the **Add Screens** will look slightly different from one another. Your Application Administrator can alter the fields for each contract type in the **Field Manager** section of the **Manage/Setup** top menu selection. Please be sure to enter all required fields.

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3. After entering all required fields (marked by a red asterisk *) on the **Add New Contract** screen, click **Save & Continue** to commit the record to the system.



Note: For long drop down lists (for example, **Vendor** drop down), click the drop down arrow for the drop down list to appear, then begin typing the name of the value you would like to select. The system will automatically filter the selections based on your entered value.

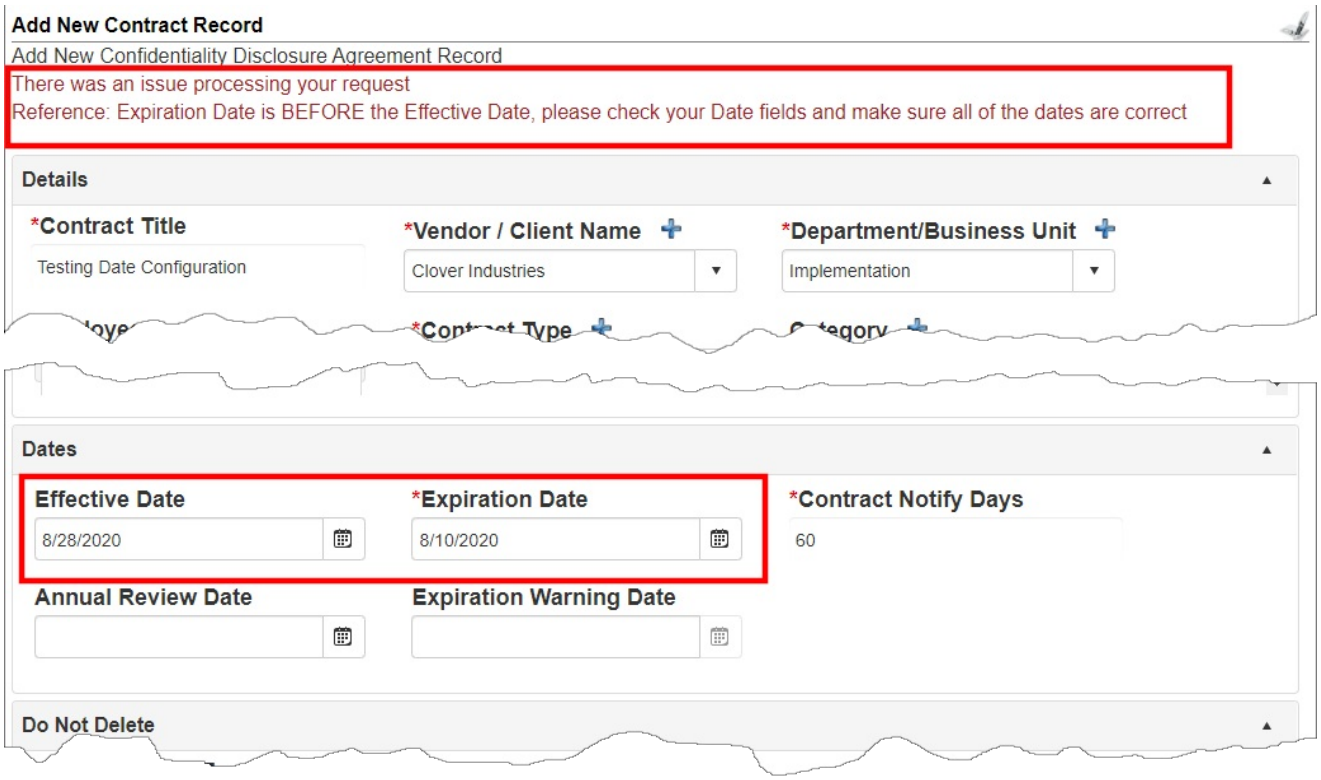
Note: Grayed out fields, those that cannot be edited, may be different in each Contract Insight system. Contact your Application Administrator if you have any questions about areas that need to be altered/edited. Also, some fields may be auto-filled upon selecting **Save & Continue**.

You may also add a new company from the **Add Contract** screen once you select the type of contract you will be adding.

Select **Add Company** link on the side menu of the **Add Contract** screen. Follow the instructions for adding a company (see the **Add a Company** Wiki page).

Note: If the expiration date entered is earlier than the expiration date, a warning displays : There was an issue processing your request. Reference: Expiration Date is BEFORE the Effective Date. Please check you Date fields and make sure all the dates are correct.

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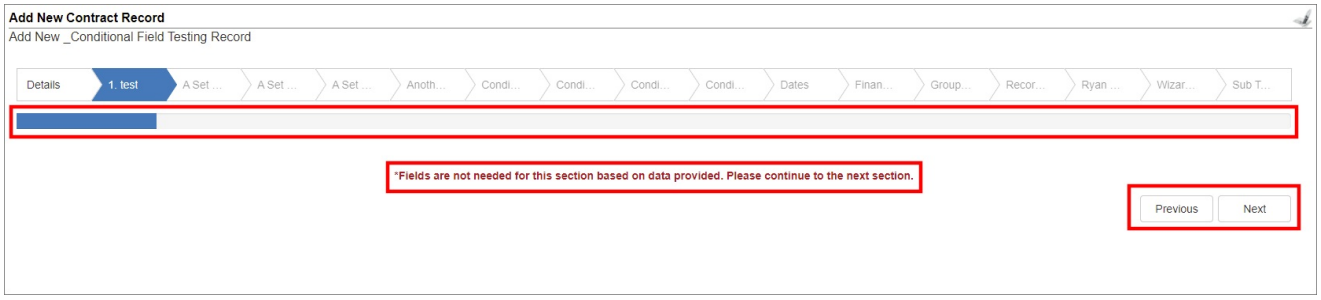


Wizard-Based Entry

Some add screens may be organized into a wizard. Click **Next** and **Previous** to navigate from section to section.

A progress bar displays toward the top of each group.

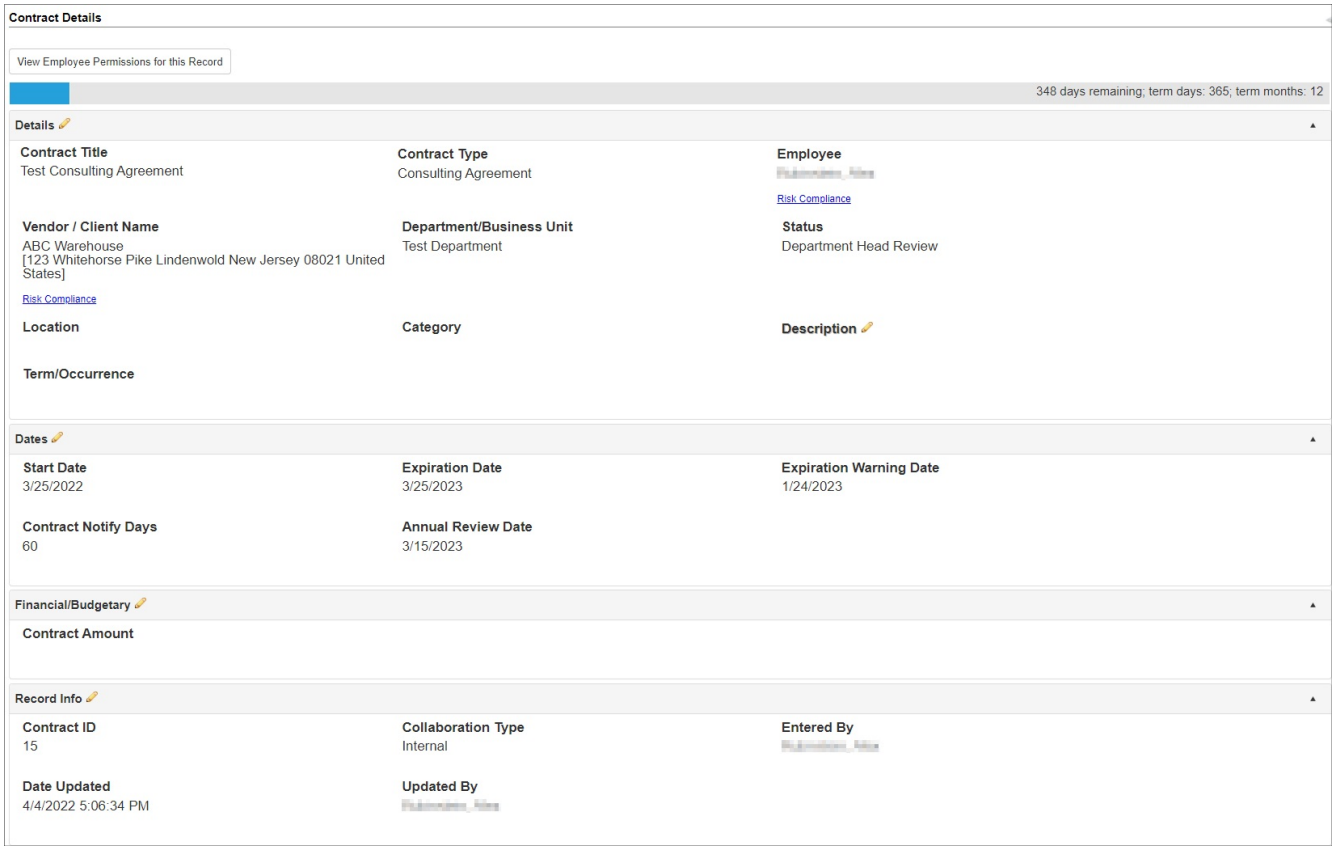
If a wizard page does not contain any fields for entry (usually due to rules dictating a field apply or not), a message letting the user know how to proceed displays.



Committing a Record

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Once you click **Save & Continue** to create the new Contract Record, Contract Insight advances to the **Contract Details** screen for the new record.



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Add Contract From File

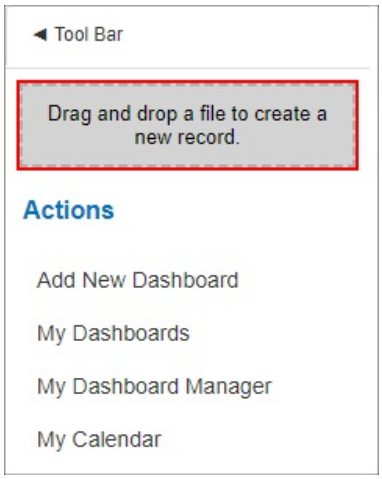
Add Contract From File

Adding a Contract: Add Contract from File

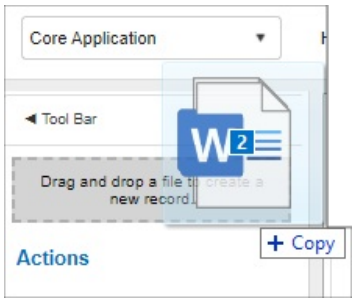
This feature allows users with the proper permissions to select a text-based document/file to upload and then go through the file and select text (within the file) to be highlighted and copied over to a field on the **Add Contract** screen. Using this option when adding a new contract record can save the user the time of re-typing Contract language into Contract Insight.

Method 1: Grey Drag and Drop Box

1. Drag and Drop File(s) on the grey box that reads, "Drag and drop a file to create a new record".

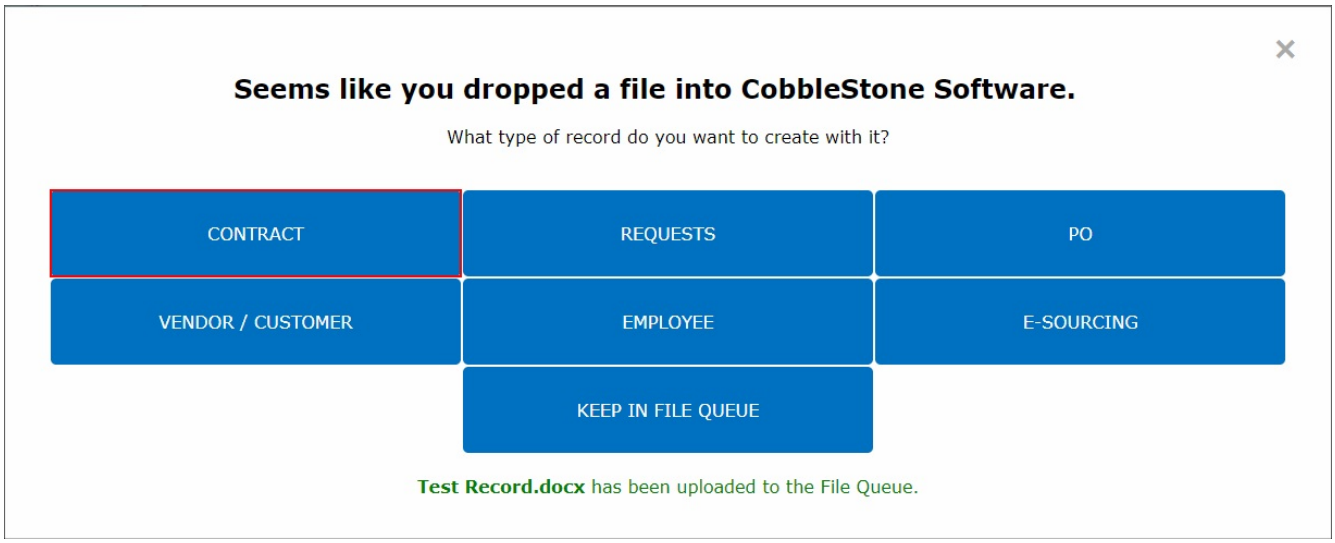


If the user wishes to create multiple records from files at one time, they may drag and drop multiple files on the grey drag and drop box.



2. After dropping the file it will prompt for what kind of record you wish to create. For a contract record, you would click on Contract.

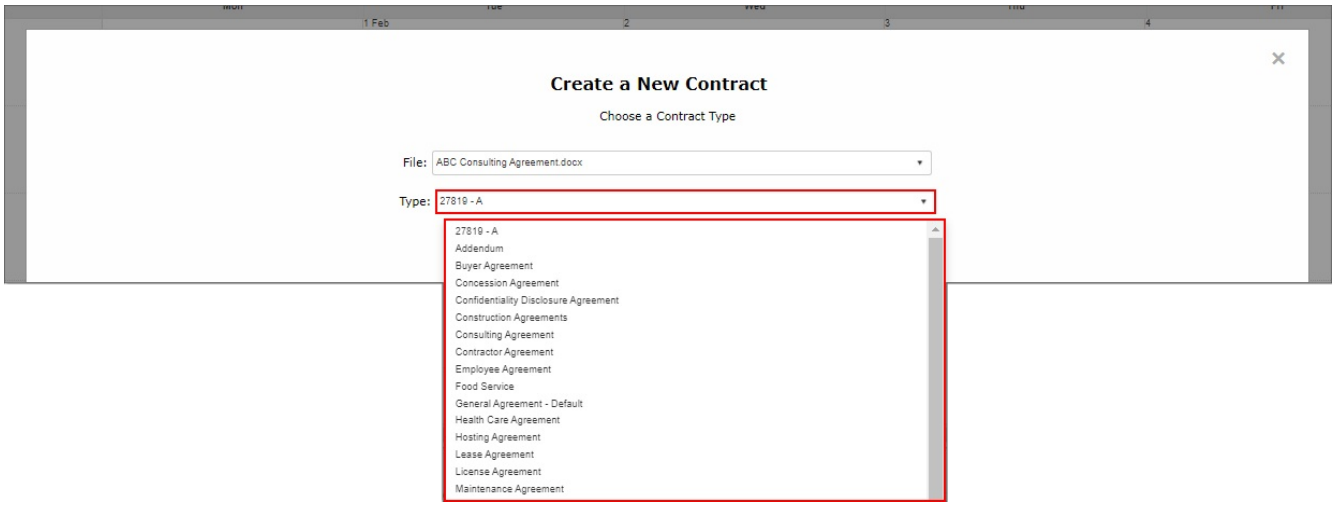
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3. The **Add New Contract Record** screen displays. Select the **File** for the new Contract Record being added.



4. Then, select the **Record Type** that is being created.



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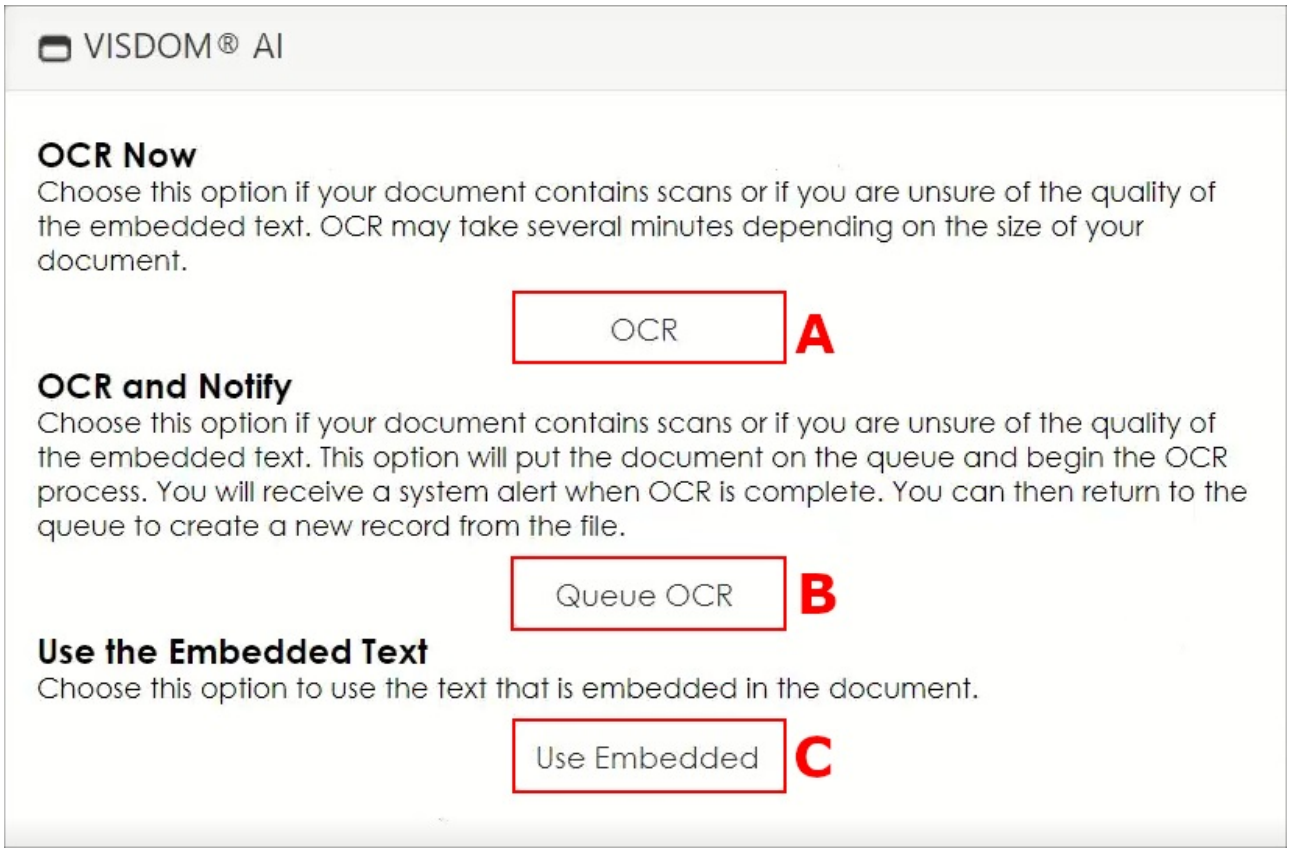
5. Select an **OCR Type**

Select one of the three options that appear on the VISDOM AI popup.

A. OCR Now: This is if the document contains scans or if the user is unsure of the quality of the embedded text. In addition, this may be a better option for older text that has already been OCR'd many years ago, as the outcome may be less than desirable given recent advancements. Lastly, it is never a bad idea to OCR things into the Cobblestone system over Embedded Text, for the sake of consistency and premium VISDOM results. This may take several minutes.

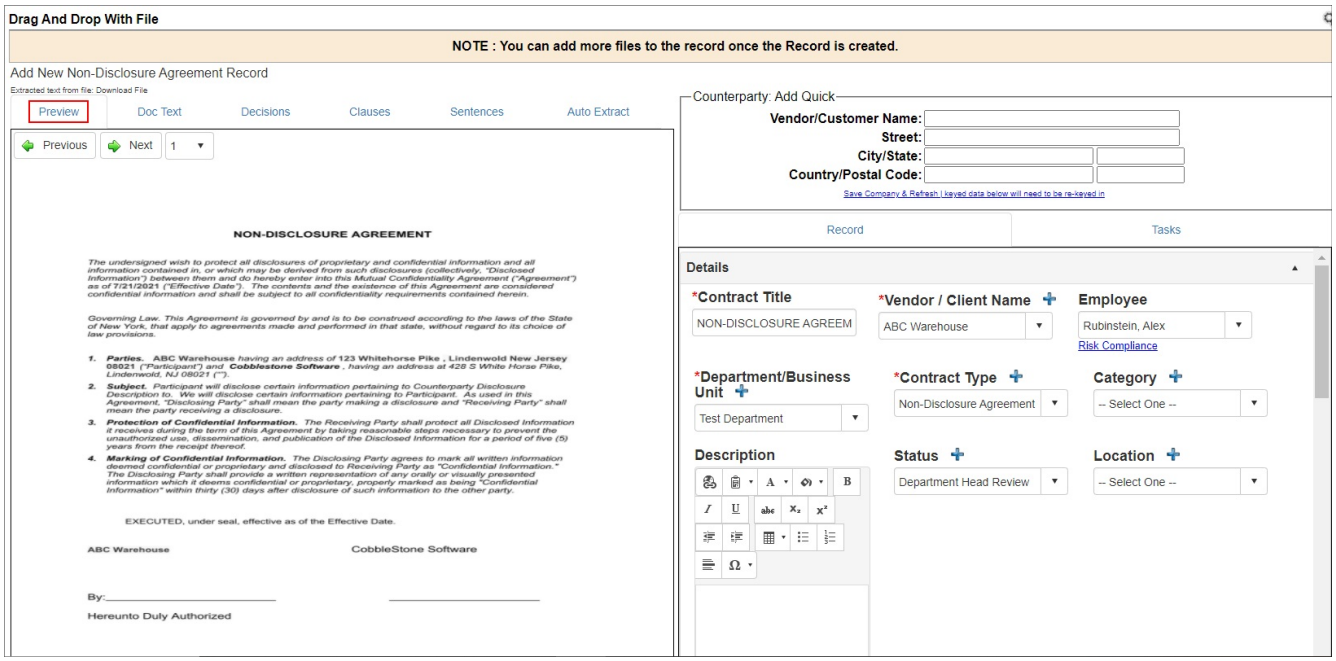
B. OCR and Notify: This is a good option for longer documents that will certainly take a longer duration to process through the OCR engine. This puts the document into a queue and begins OCR'ing it in the background immediately. Upon completion, a notification appears in the Alerts & Notifications area. The user can bypass the typical extraction process once complete.

C. Use Embedded Text: This option uses the text that is embedded in the document. This also works if the document has already been OCR'ed, as this process defers OCR until a later point, but VISDOM pulls text as available. It is possible that the user has a document where some text is embedded, and some is not, so OCR Now is a better choice given these circumstances.



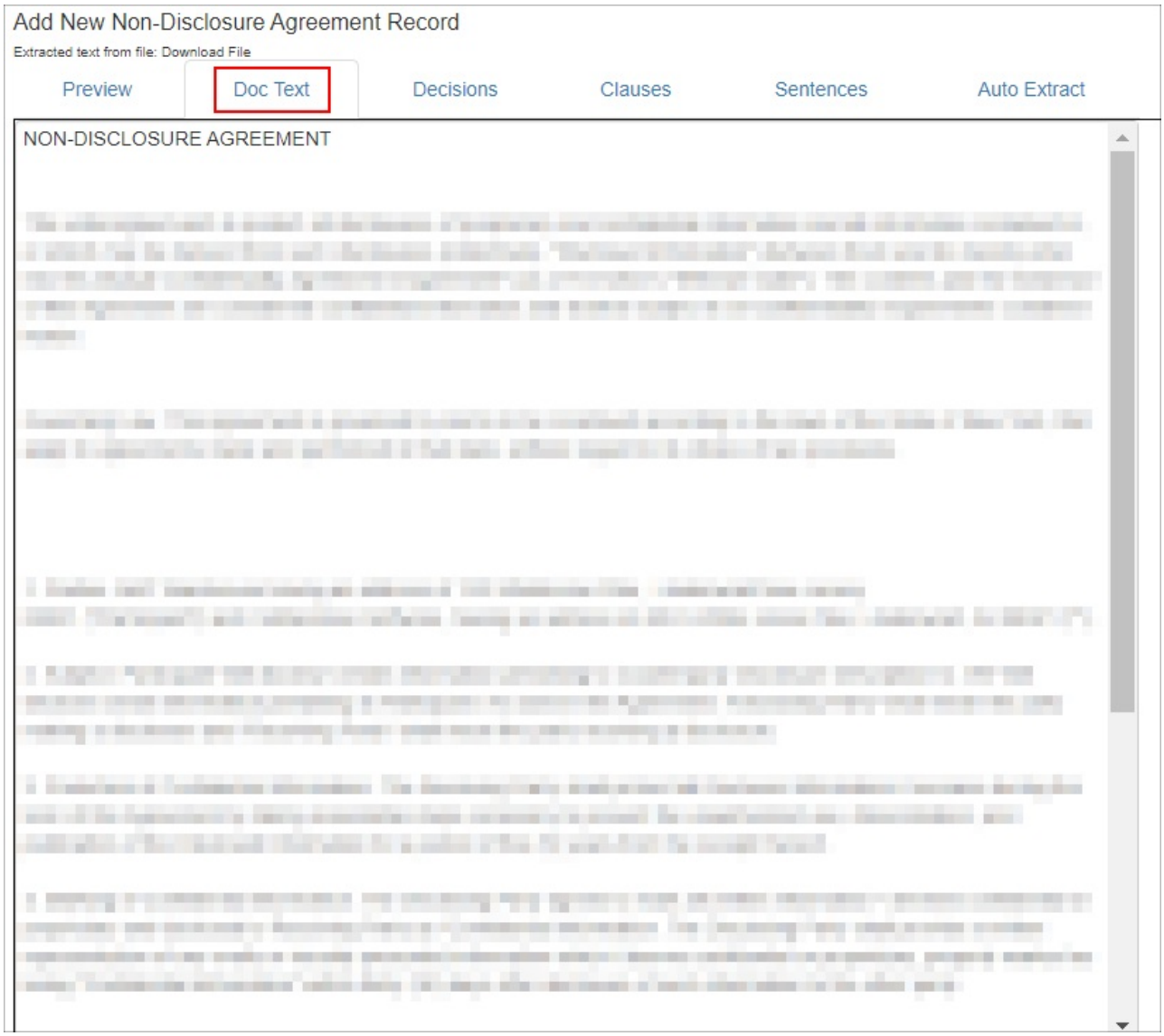
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6. Review the Add Screen. Always be sure to double check the record, assuring information has pulled completely and correctly. It is up to the user to make sure the information has pulled over correctly.



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If it is an imaged based pdf, by clicking the **Text** tab, no text found displays. If there is text found in the document, it can be Auto-Extracted from the document and placed in the fields on the right hand side. For auto-extract settings please visit the **Auto Extract Wiki Settings Page**.

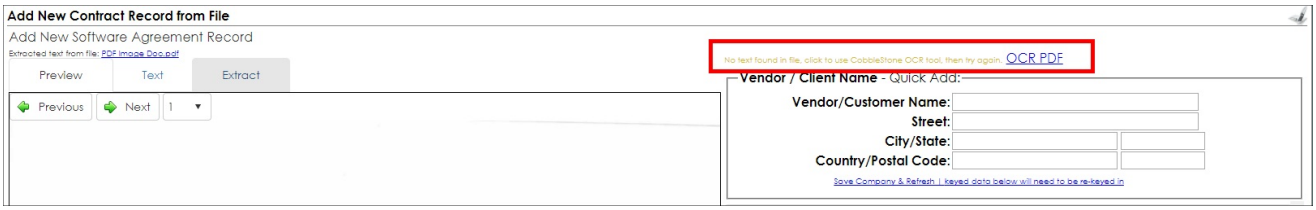


Contract Insight has a built in OCR (Optical Character Recognition) Tool for image based pdf's that will extract the text.

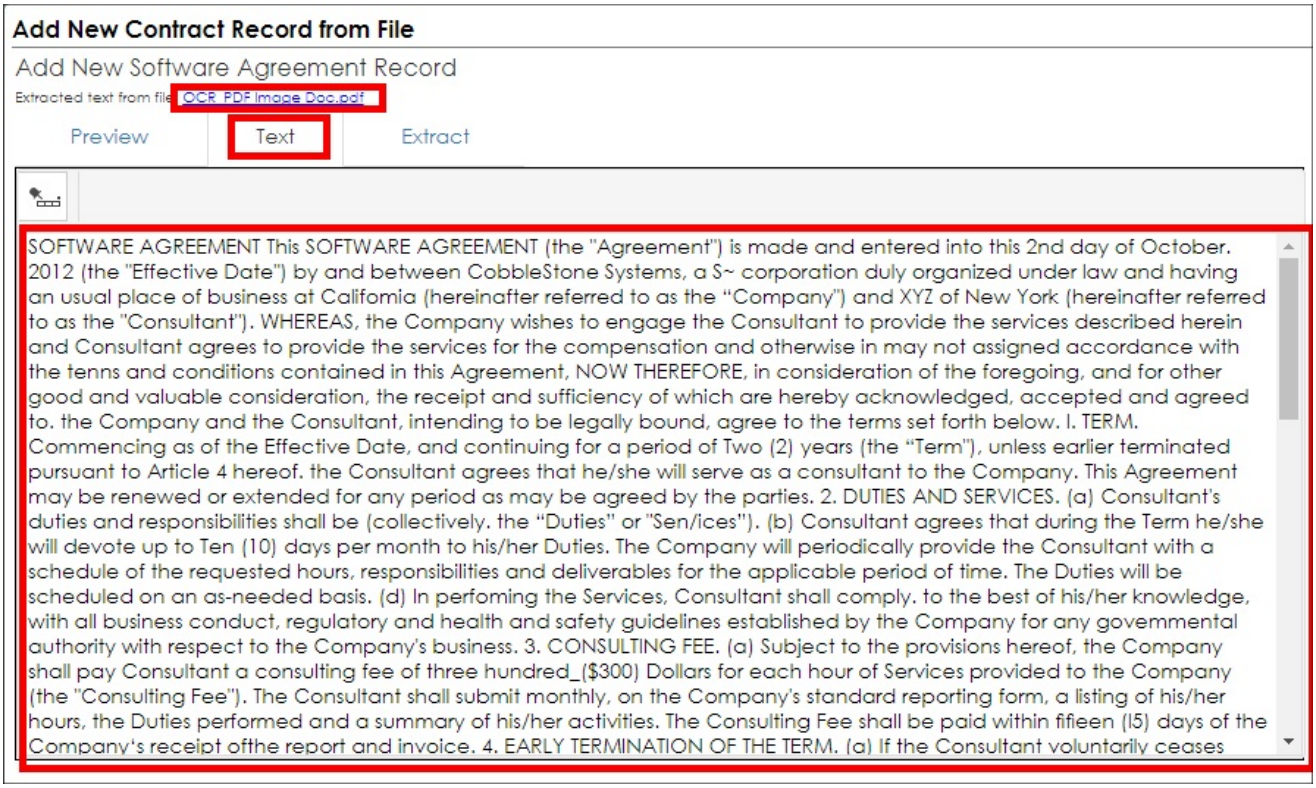
Note: It is recommended that files larger than 25 MB be broken up and separated to separate files when uploading. Note many computer systems depend on the internet connection, time-out settings, e-mail settings and uploading large files might affect performance. The system does has not imposed a limit on the number of files that can be added to contract record. Results of the OCR Tool depend on the document quality.

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By clicking **OCR PDF**, Contract Insight will OCR the document and turn it into a text based pdf.

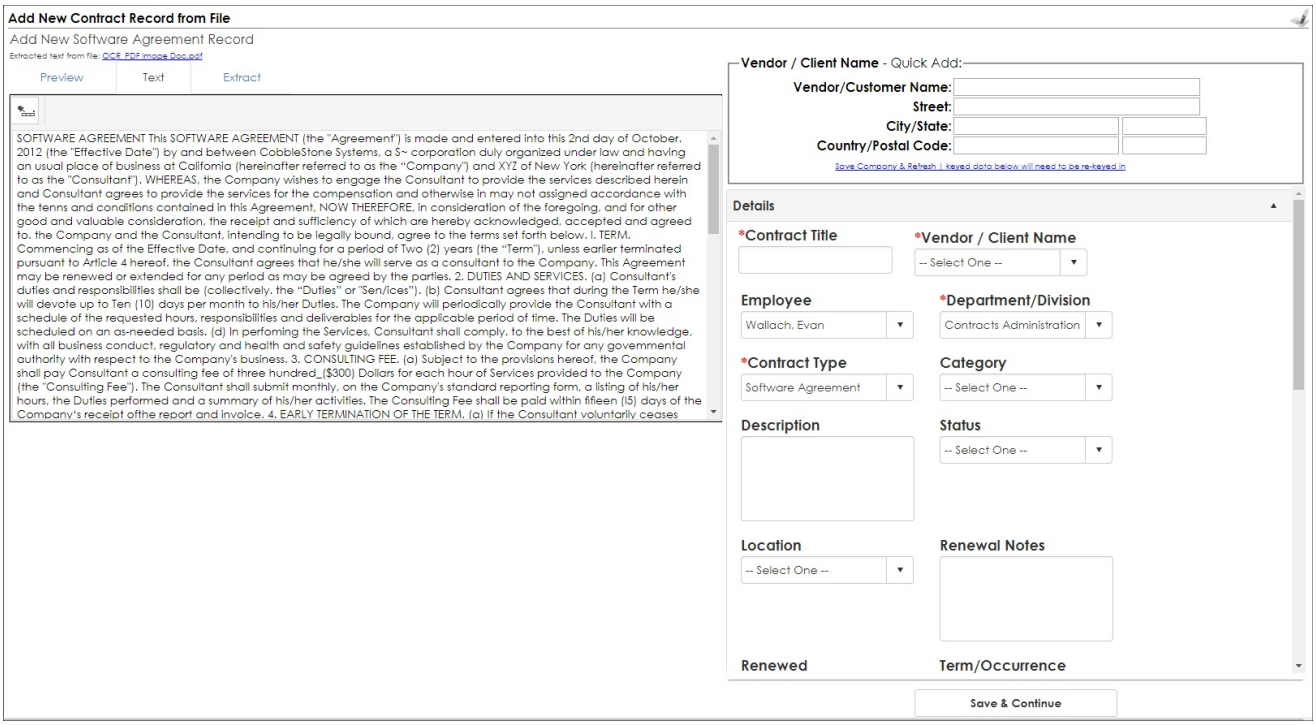


Once the OCR tool is used, the file name will change and, by clicking the **Text** tab, the extracted text displays (Again, the tool works better with better images).

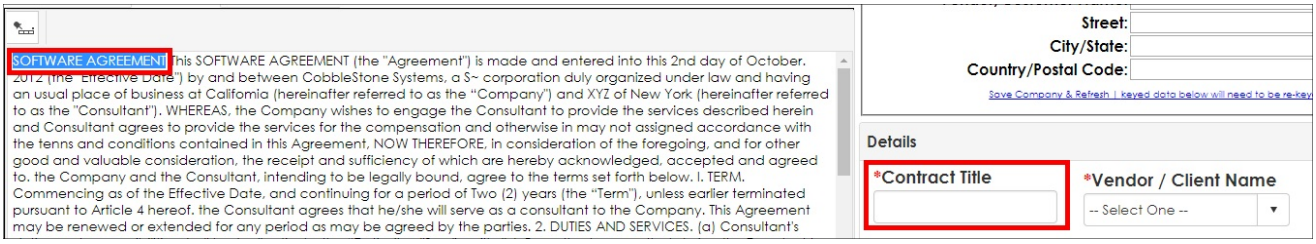


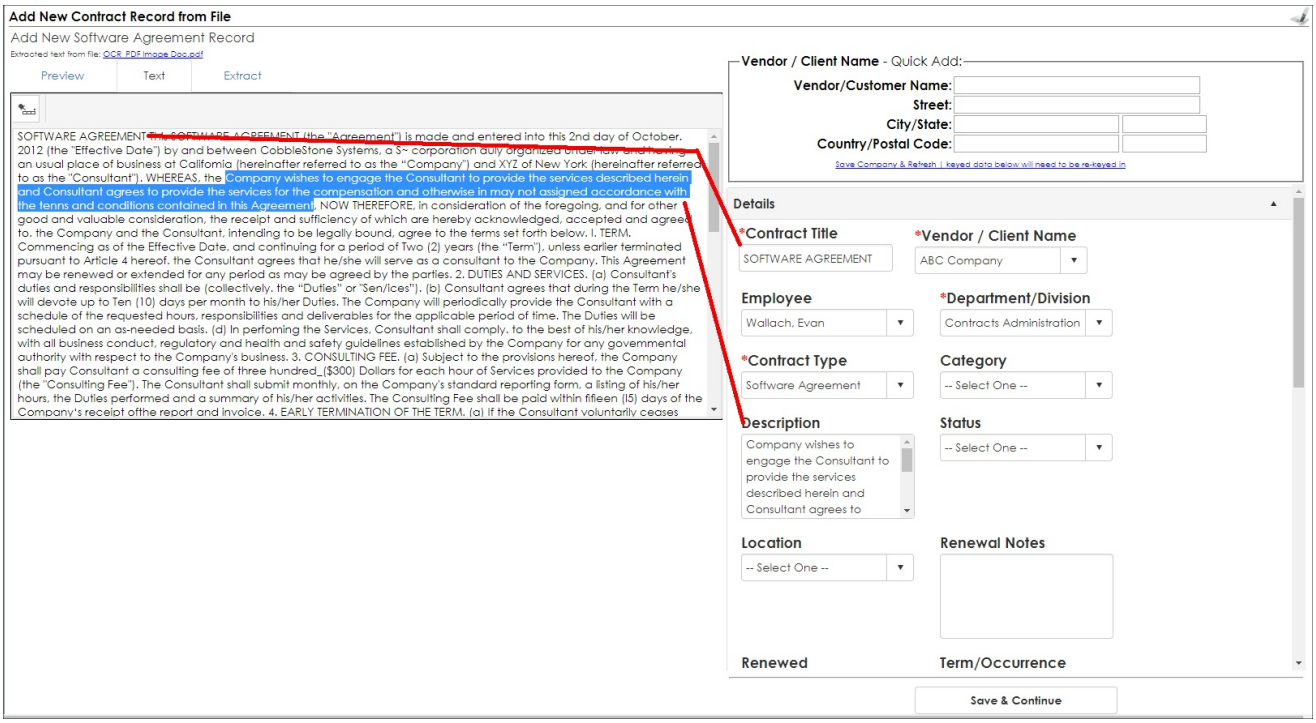
If the pdf is already text based, the screen will provide you with the text that was in the selected file/document as well as all of the **Add Contract Record** screen fields that should be displayed for the selected **Contract Type**.

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7. Using your mouse, you can then select/highlight a portion of the text in the left box that a user can then drag and drop into the desired text box in the right hand side of the screen.

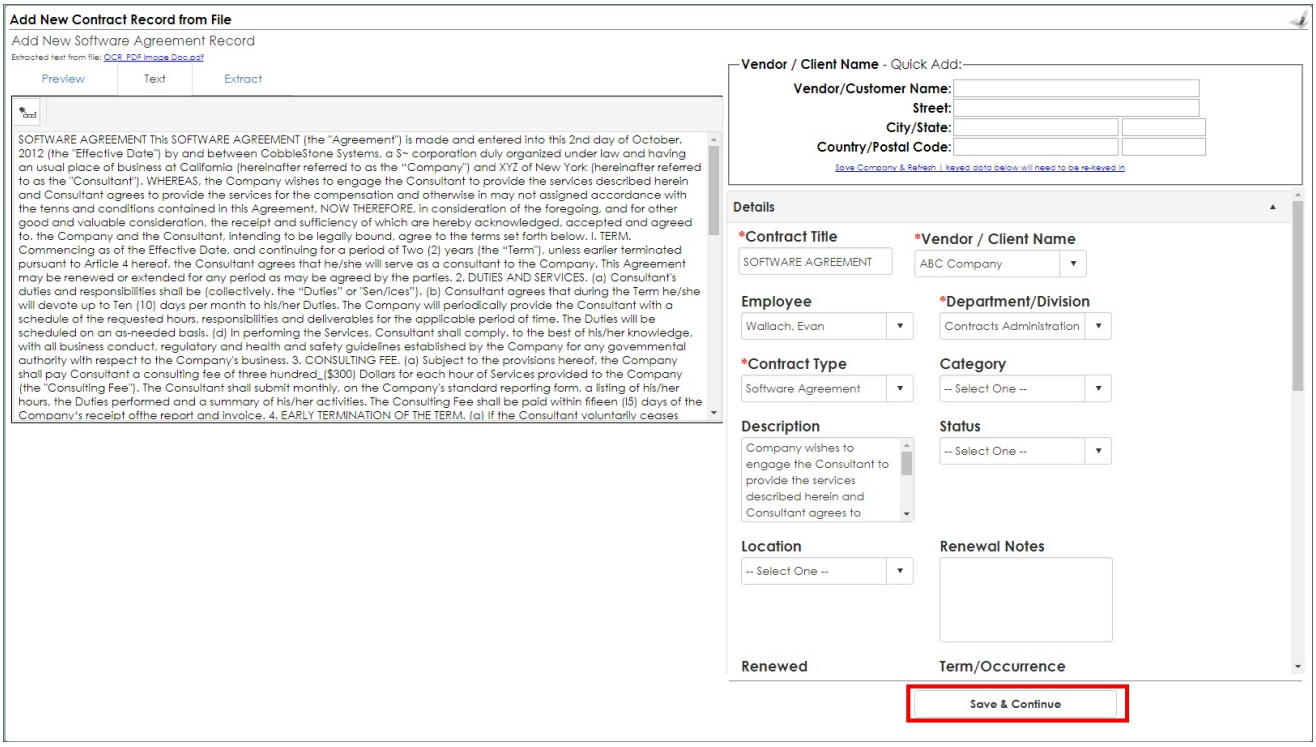




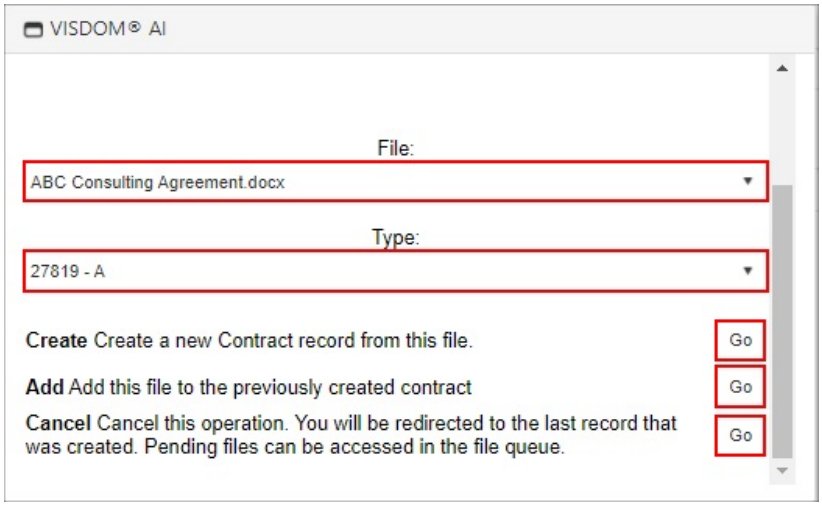
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8. Note that for drop down lists (such as for the **Vendor/Customer**, **Employee Assigned**, and **Department/Division** fields) still need to be clicked to then manually select the value needed to populate the field.

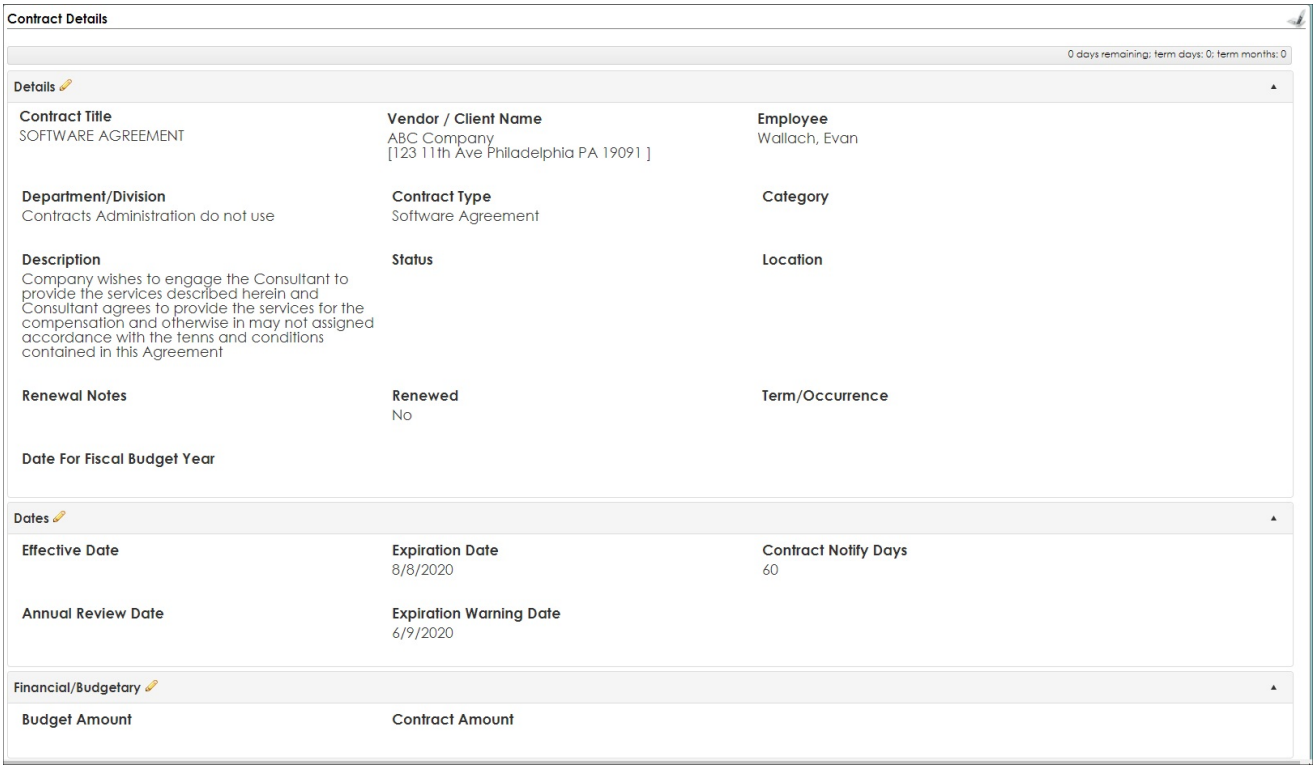
9. Once field population is complete, click **Save & Continue** at the bottom of the screen to save the new Contract Record and navigate to the new record's **Contract Details** screen.



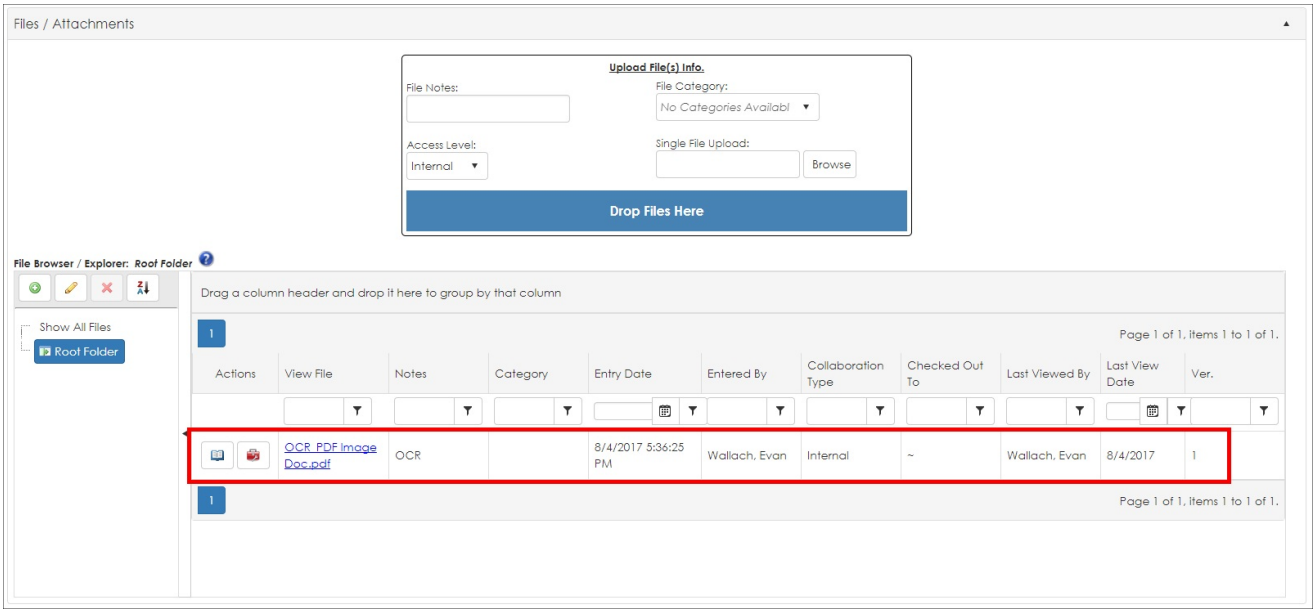
10. **If working with multiple files**, please follow the same steps as 1-6. Then with every file thereafter, follow the prompt. This asks the user if they are creating a new record altogether (the creation of multiple records at one time), if they are adding this file to the previously created contract from the subsequent entry (the addition of supporting documentation the the previously entered record), or if they would like to cancel the operation and keep the unentered files in the file queue.



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11. Note that the file/document that the Contract Record was created from is automatically attached to the Contract in the **Files/Attachments** section of the **Contract Details** screen, where it can be opened/downloaded.



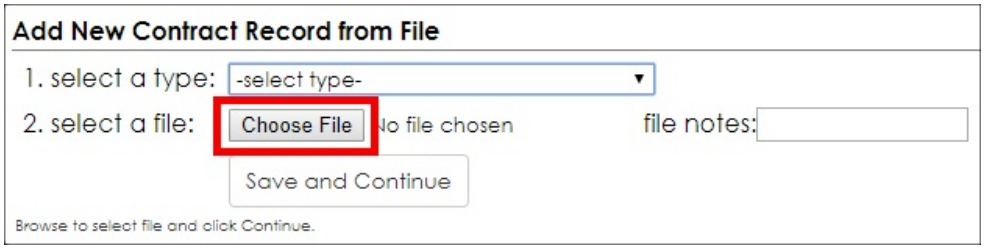
Method 2. Contracts Dropdown

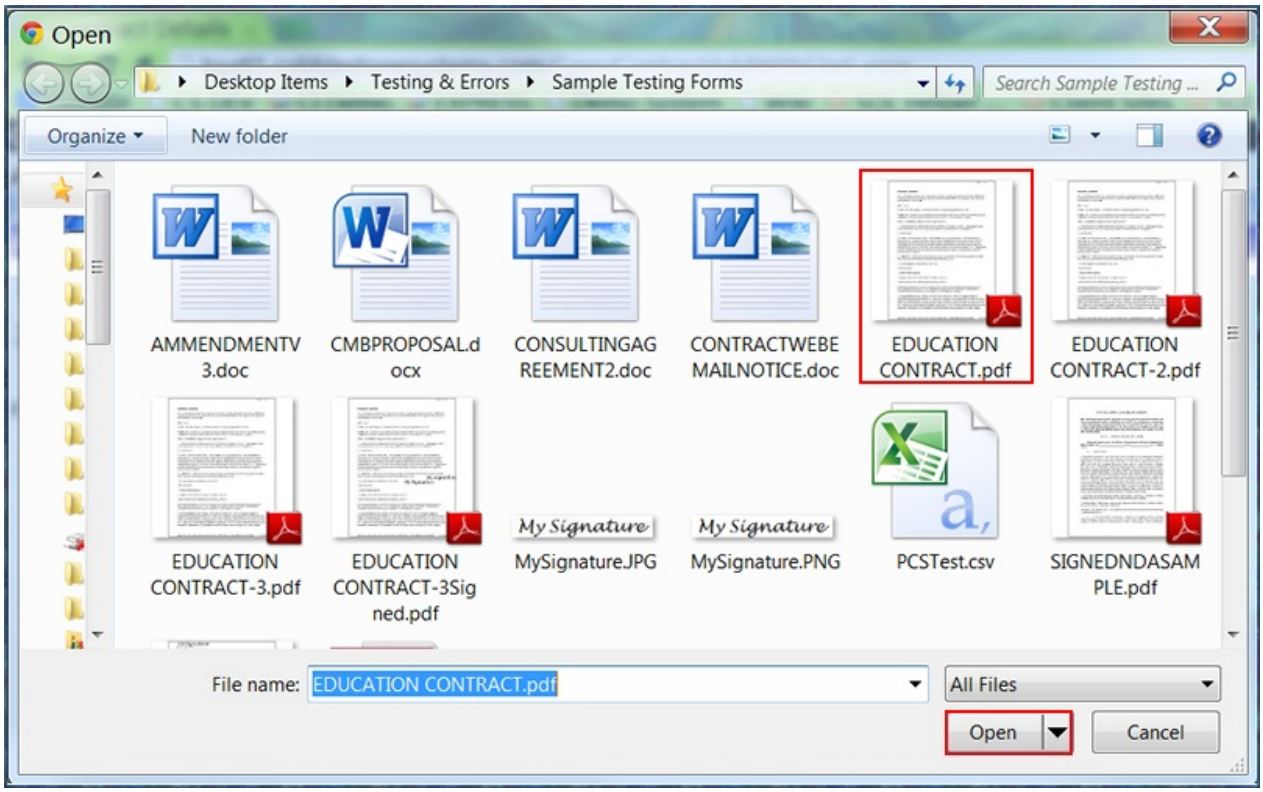
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1. Navigate to **Contracts** > **Add Contract From File**.



2. Click **Browse** or **Choose File** (depending on the Internet Browser used) to navigate to and select the text-based file/document from which to create the new Contract Record.

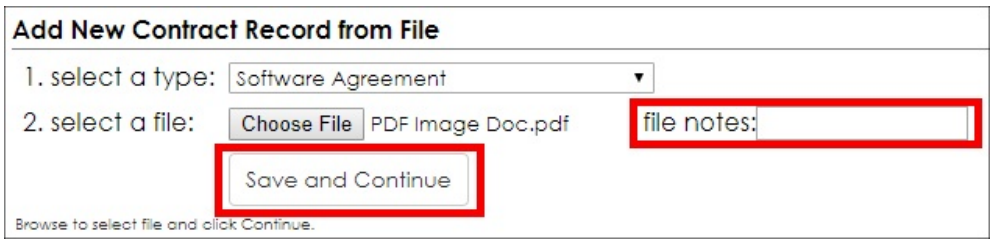




3. Optionally, any necessary File Notes can be added in the text box to the right of the file name.

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4. Click **Continue** to open the **Add New Contract Record** screen.



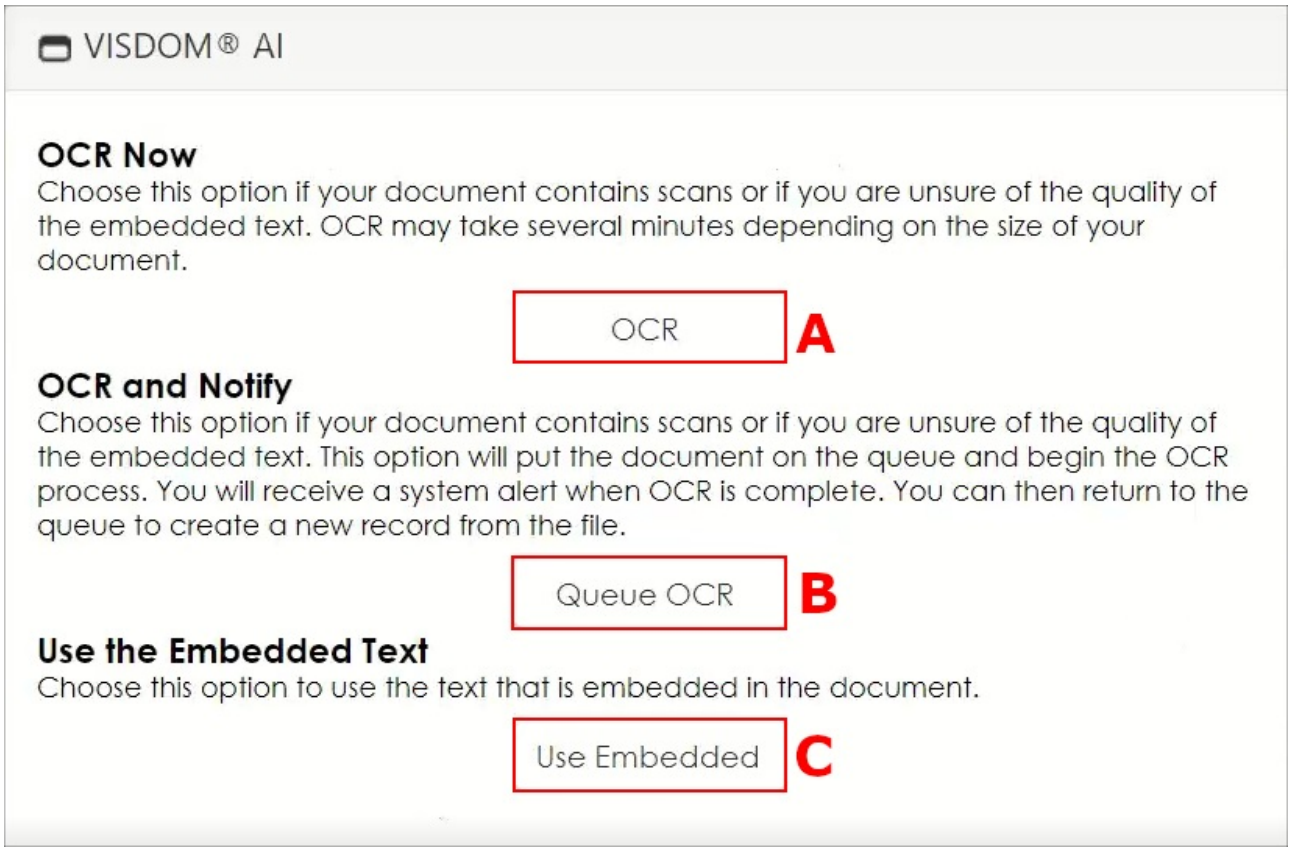
OCR Type

Select one of the three options that appear on the VISDOM AI popup.

A. OCR Now: This is if the document contains scans or if the user is unsure of the quality of the embedded text. In addition, this may be a better option for older text that has already been OCR'd many years ago, as the outcome may be less than desirable given recent advancements. Lastly, it is never a bad idea to OCR things into the Cobblestone system over Embedded Text, for the sake of consistency and premium VISDOM results. This may take several minutes.

B. OCR and Notify: This is a good option for longer documents that will certainly take a longer duration to process through the OCR engine. This puts the document into a queue and begins OCR'ing it in the background immediately. Upon completion, a notification appears in the Alerts & Notifications area. The user can bypass the typical extraction process once complete.

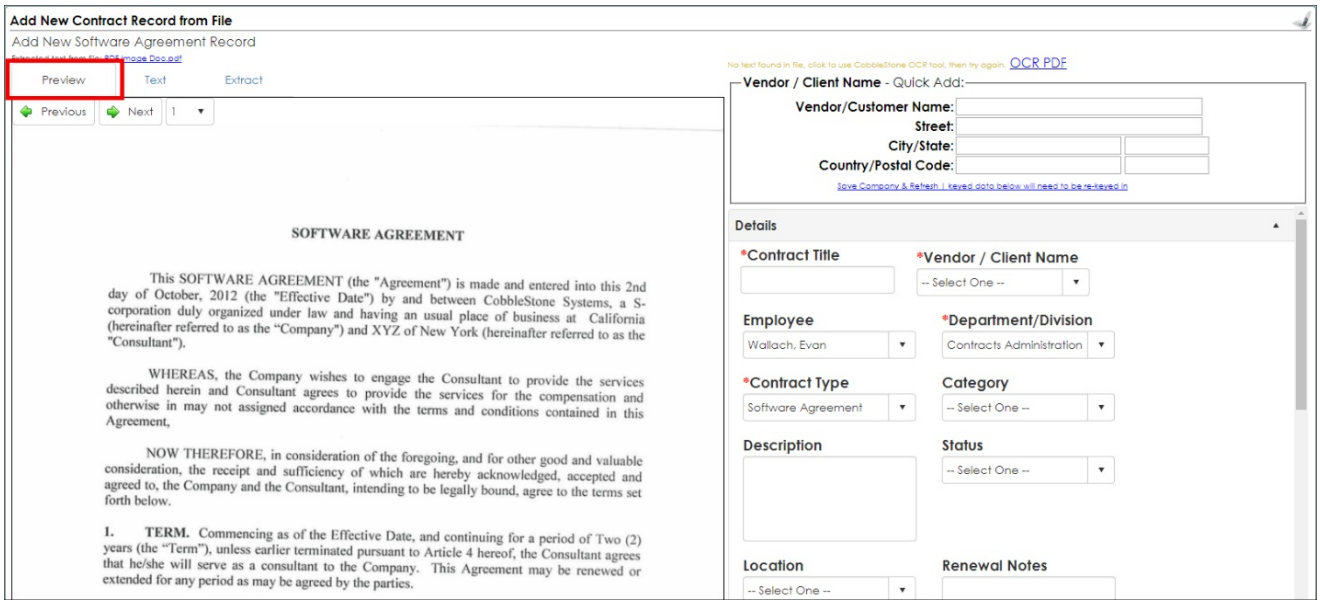
C. Use Embedded Text: This option uses the text that is embedded in the document. This also works if the document has already been OCR'ed, as this process defers OCR until a later point, but VISDOM pulls text as available. It is possible that the user has a document where some text is embedded, and some is not, so OCR Now is a better choice given these circumstances.



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The Add Screen

If the document is an imaged based pdf, on the next screen, a preview of the pdf displays.



If it is an imaged based pdf, by clicking the **Text** tab, no text found displays. If there is text found in the document, it can be Auto-Extracted from the document and placed in the fields on the right hand side. For auto-extract settings please visit the **Auto Extract Wiki Settings Page**.



Contract Insight has a built in OCR (Optical Character Recognition) Tool for image based pdf's that will extract the text.

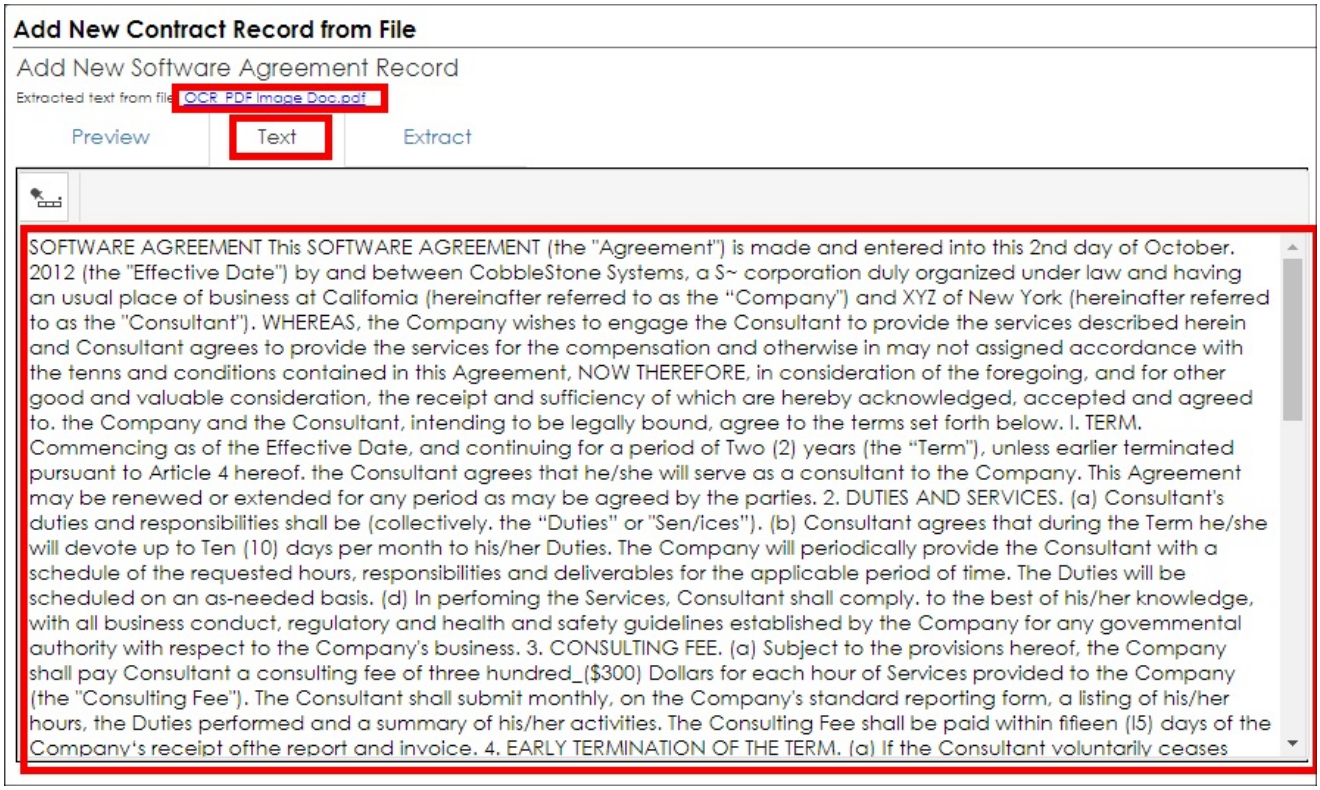
Note: It is recommended that files larger than 25 MB be broken up and separated to separate files when uploading. Note many computer systems depend on the internet connection, time-out settings, e-mail settings and uploading large files might affect performance. The system does has not imposed a limit on the number of files that can be added to contract record. Results of the OCR Tool depend on the document quality.

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By clicking **OCR PDF**, Contract Insight will OCR the document and turn it into a text based pdf.

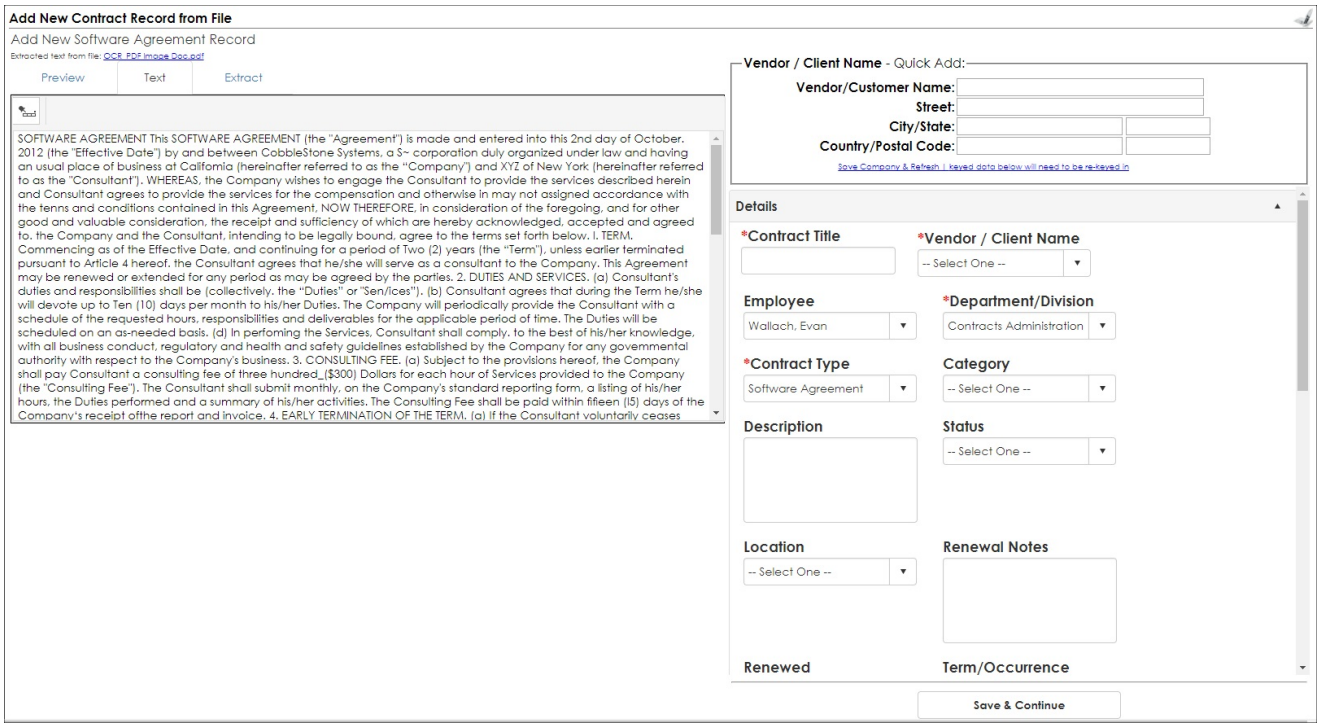


Once the OCR tool is used, the file name will change and, by clicking the **Text** tab, the extracted text displays (Again, the tool works better with better images).

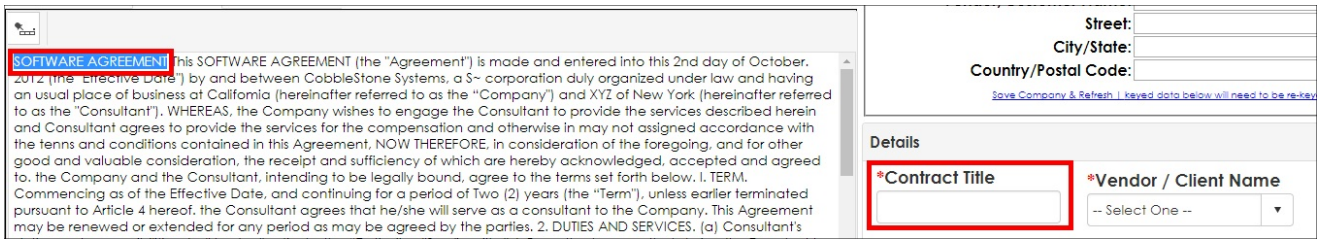


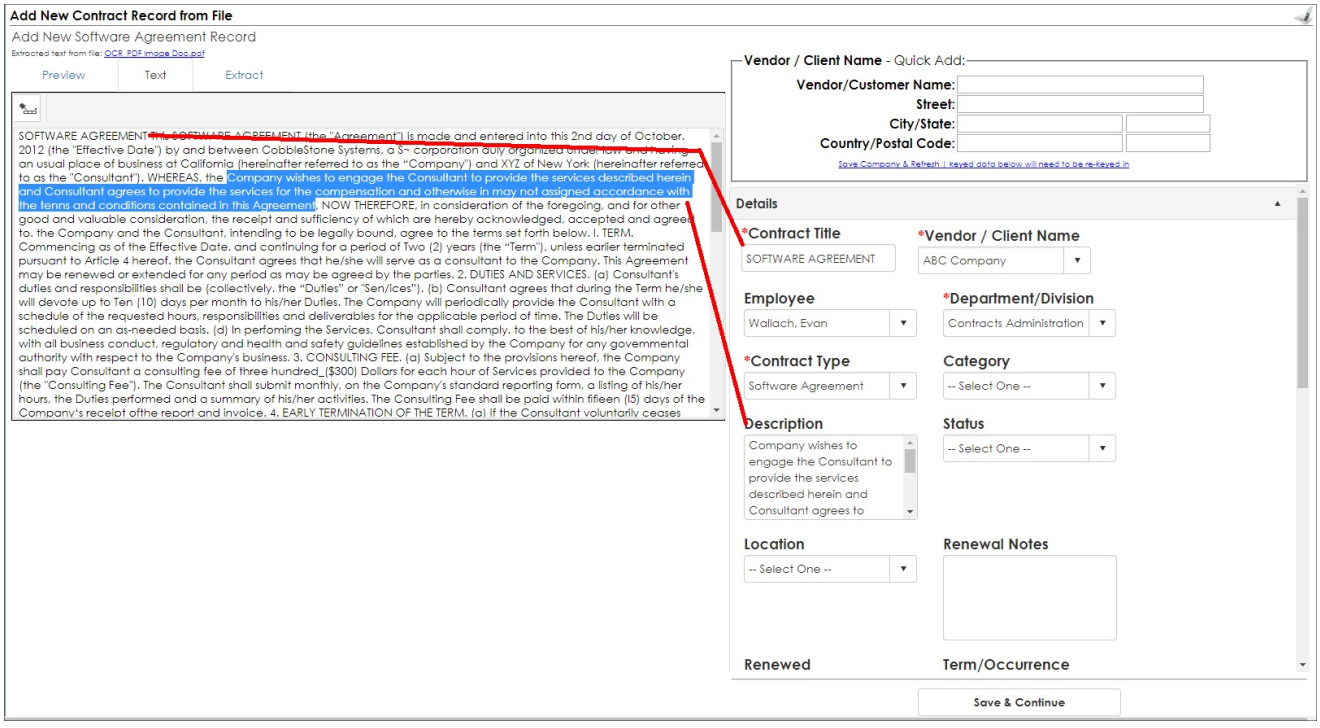
If the pdf is already text based, the screen will provide you with the text that was in the selected file/document as well as all of the **Add Contract Record** screen fields that should be displayed for the selected **Contract Type**.

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5. Using your mouse, you can then select/highlight a portion of the text in the left box that a user can then drag and drop into the desired text box in the right hand side of the screen.





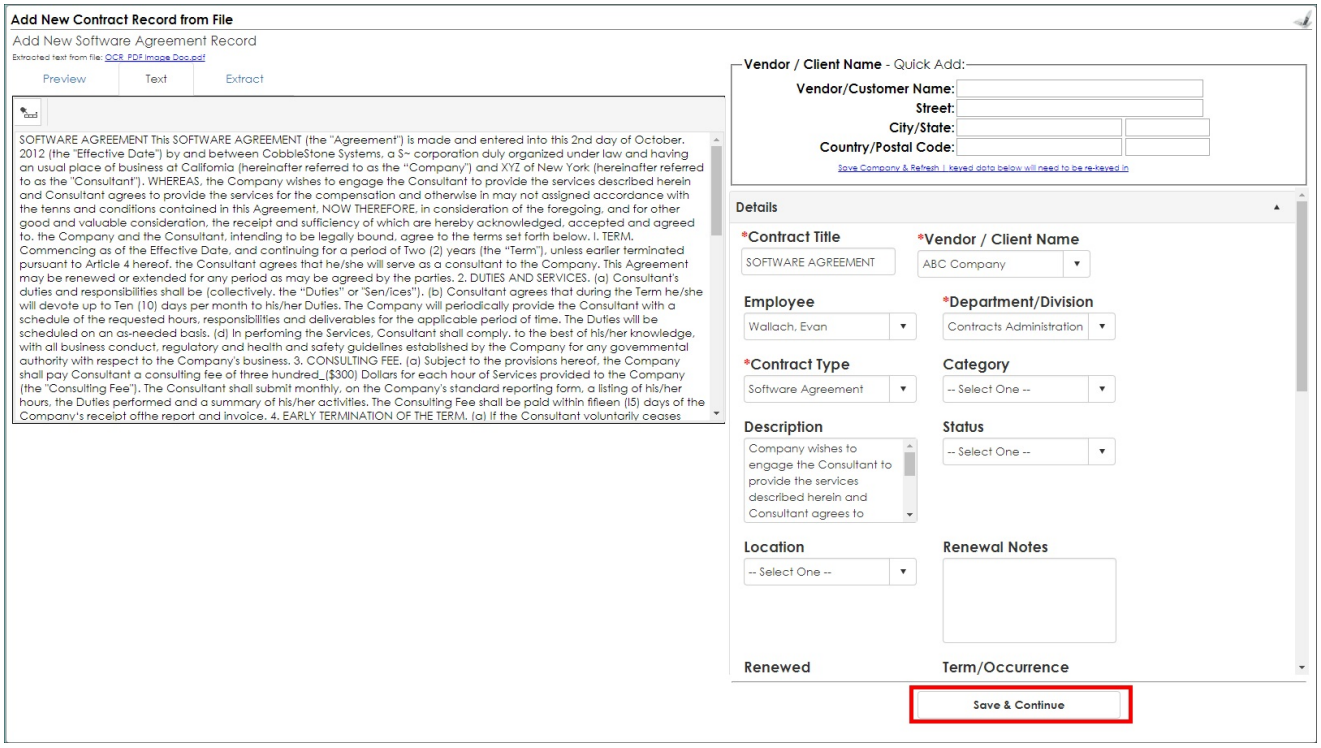
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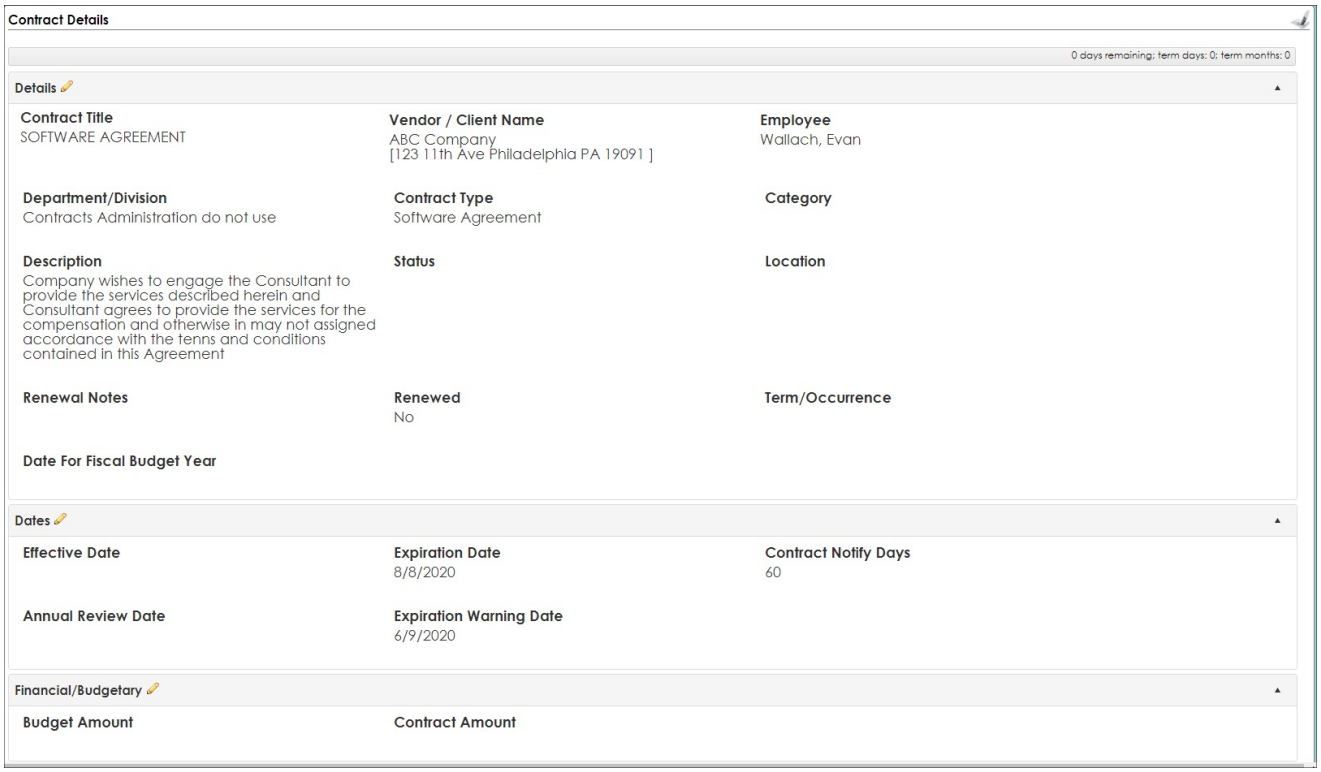


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6. Note that for drop down lists (such as for the **Vendor/Customer**, **Employee Assigned**, and **Department/Division** fields) still need to be clicked to then manually select the value needed to populate the field.

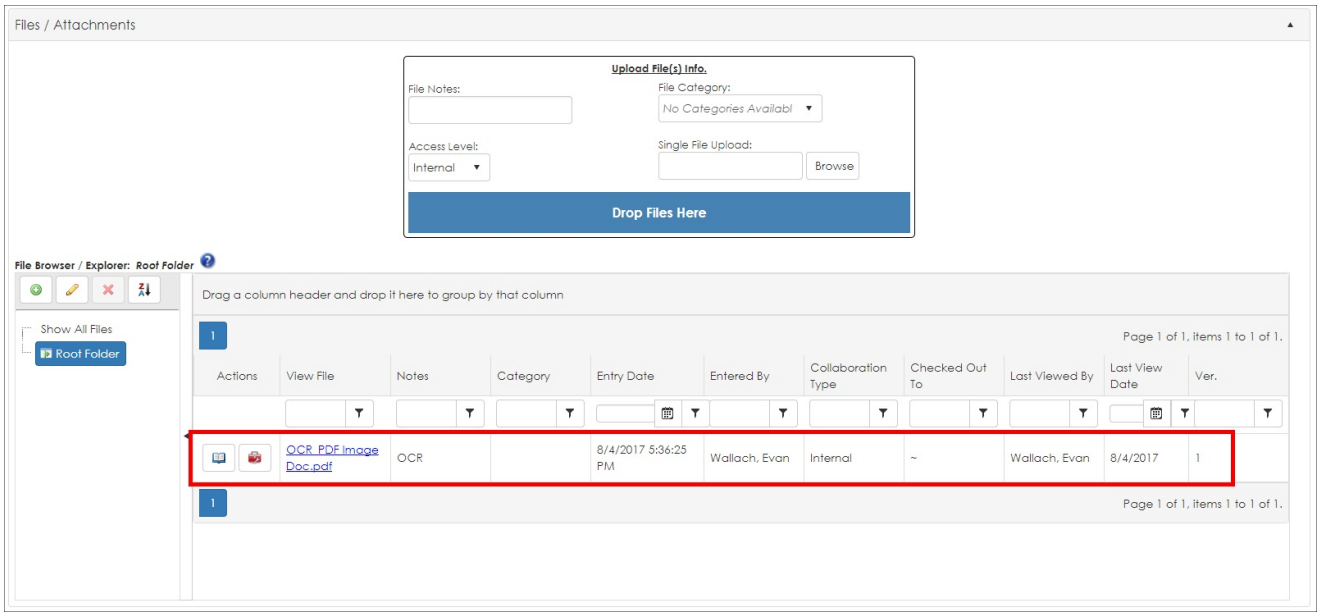
7. Once field population is complete, click **Save & Continue** at the bottom of the screen to save the new Contract Record and navigate to the new record's **Contract Details** screen.





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8. Note that the file/document that the Contract Record was created from is automatically attached to the Contract in the **Files/Attachments** section of the **Contract Details** screen, where it can be opened/downloaded.



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Add a Contract by Vendor/Client

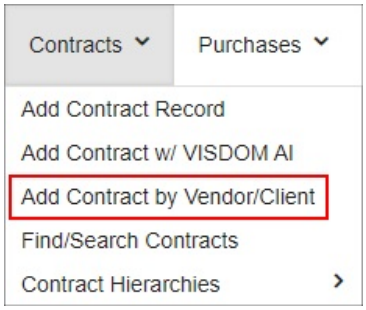
Add a Contract by Vendor/Client

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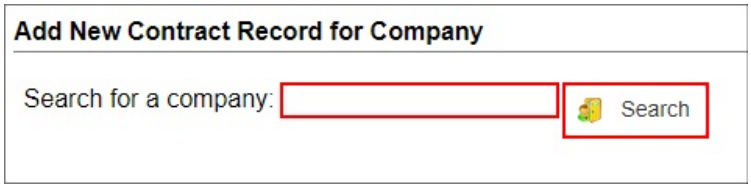
Adding a Contract by Vendor/Client

Before adding a contract into the Contract Insight system, it is best to verify with the Application Administrator that all departments, vendors, employees, locations, contract types, and status information has been entered.

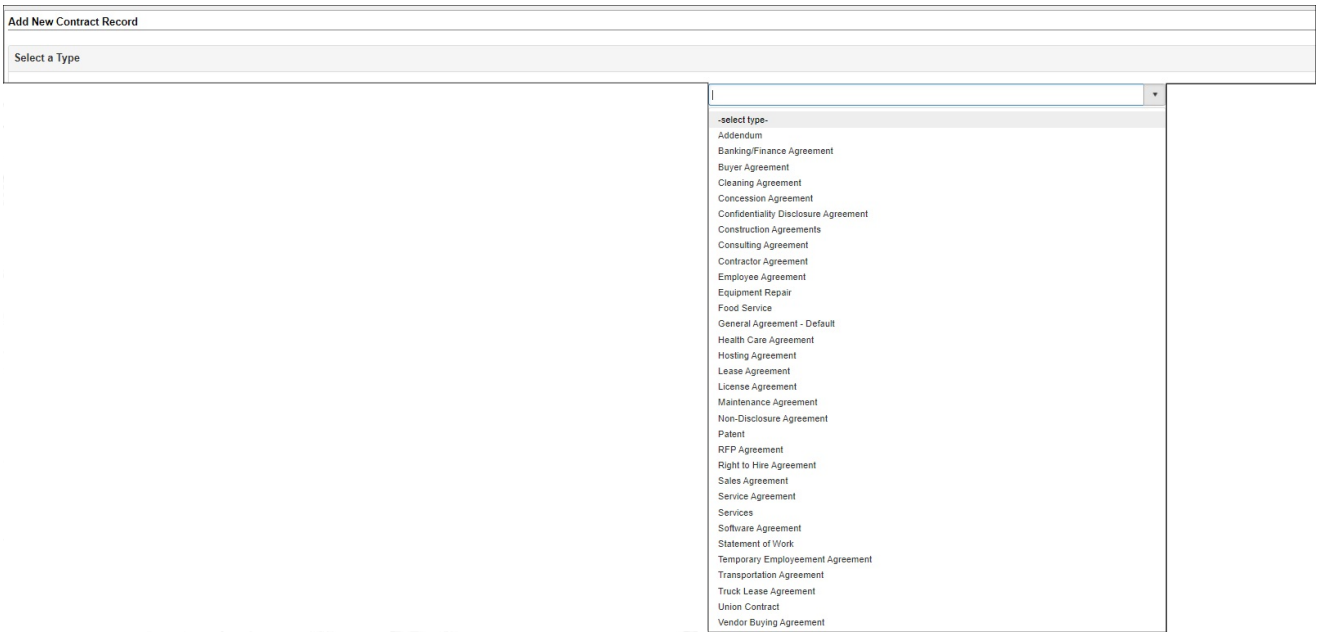
1. To Add a Contract by Vendor/Client, on the top navigation menu, go to **Contracts** > **Add Contract by Vendor/Client**.



2. The **Add New Contract Record** screen displays. Enter the desired vendor/customer name, click **Search**, and select the Vendor/Customer name for whom you would like to add the new contract.



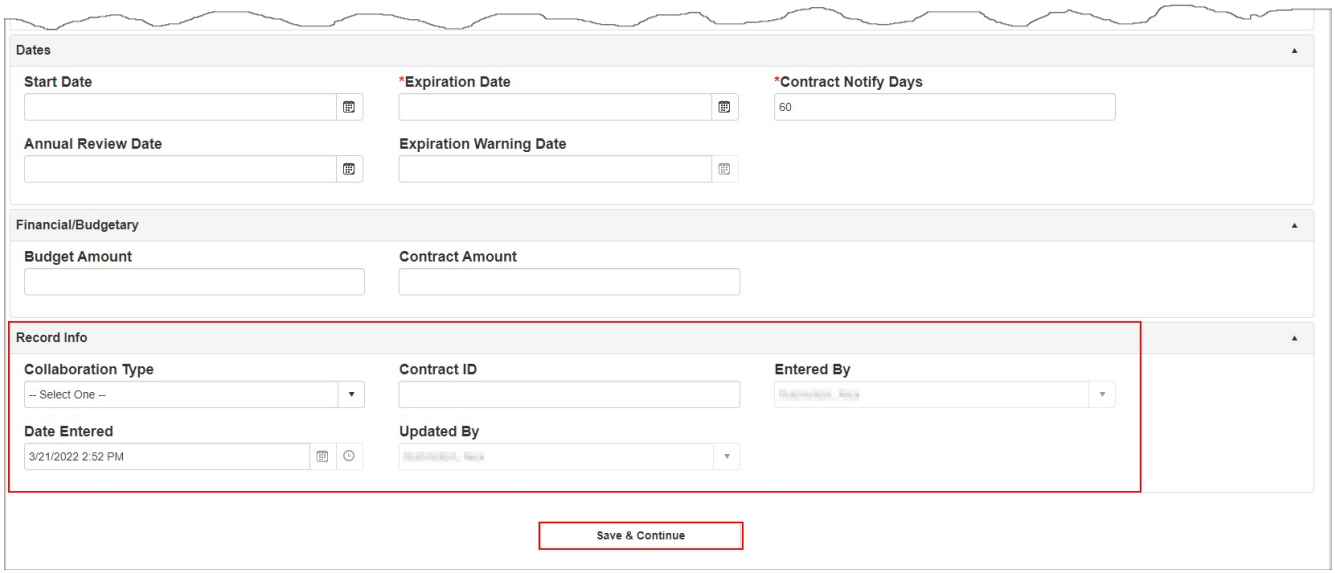
3. After selecting the Vendor/Customer you would like to add the new contract record with, you will then be asked to select the Contract Type of the new contract record.



Note: Depending on the contract type selected, the **Add Screens** will look slightly different from one another. Your Application Administrator can alter the fields for each contract type in the **Field Manager** section of the **Manage/Setup** top menu selection. Please be sure to enter all required fields.

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4. After entering all required fields (marked by a *) on the **Add New Contract** screen, click **Save & Continue** to add the new contract.

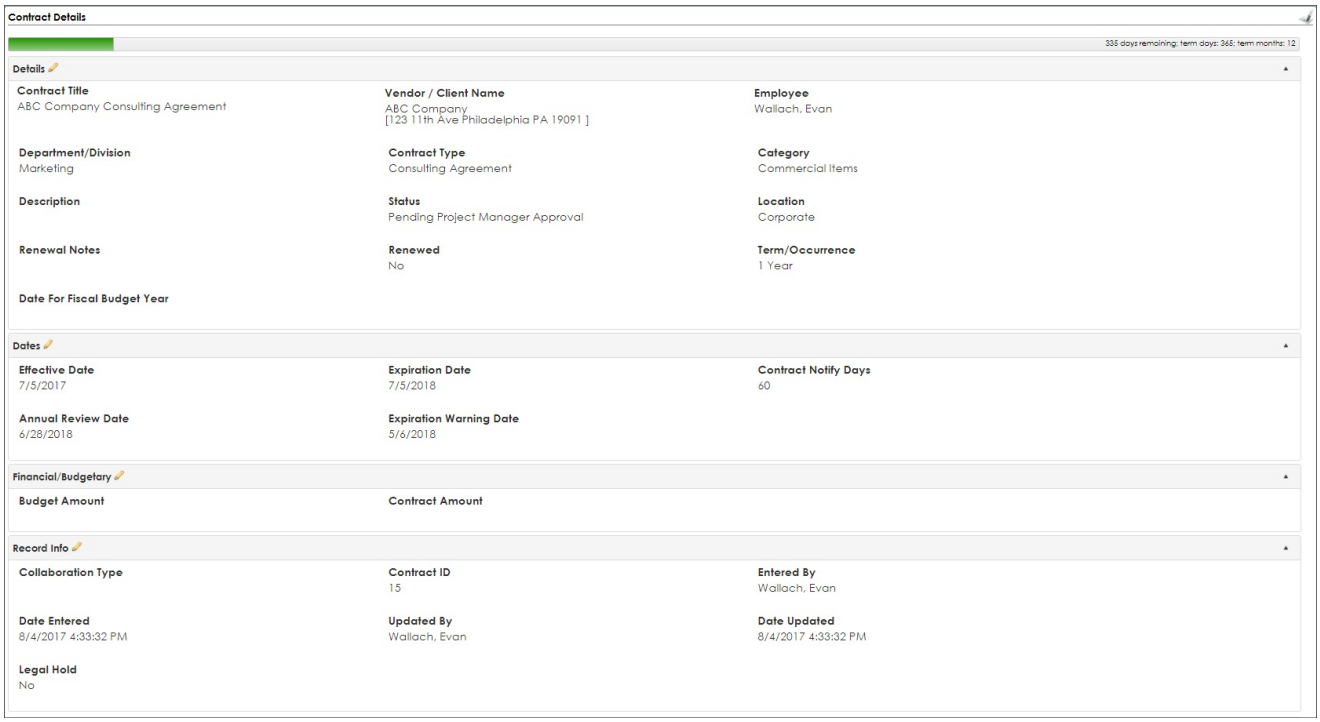


Note: For long drop down lists (for example, Vendor drop down), click the drop down arrow for the drop down list to appear and begin typing the name of the vendor you would like to add. The system will automatically position to the area of the drop down that corresponds to what is being entered.

Note: Grayed out fields may be different in each Contract Insight system. Contact your Application Administrator if you have any questions about areas that need to be altered/edited. Some fields may be automatically filled when clicking **Continue**.

Click **Save & Continue** to create the new Contract Record. The **Contract Details** screen for the new record displays.

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Add Sub-Table Lines

Add Sub-Table Lines

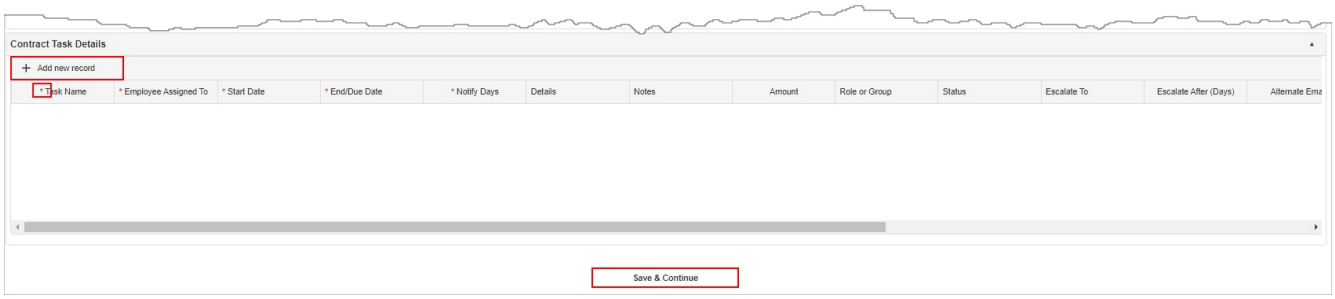
Adding a Contract: Adding Sub-Table Data on the Add Screen

If configured to, some sub-tables may be available to data entry on the record's Add Screen.

Adding Sub-Table Lines on the Record Add Screen

1. Add a new record as usual.

2. Between the individual fields and the Save & Continue button, each selected sub-table is available. If a particular sub-table is not available, your system administrator has not enabled it for use on the add screen.



3. Click Add New Record.

4. A set of fields appears for each column header for each sub-table. Enter data into all required fields (as marked with a red asterisk (*) in the column header) and all other data available.

5. When done entering data for the parent record and all applicable sub-tables, click **Save & Continue**.

For more information on sub-tables, please review our wiki page on Custom Sub-Tables.

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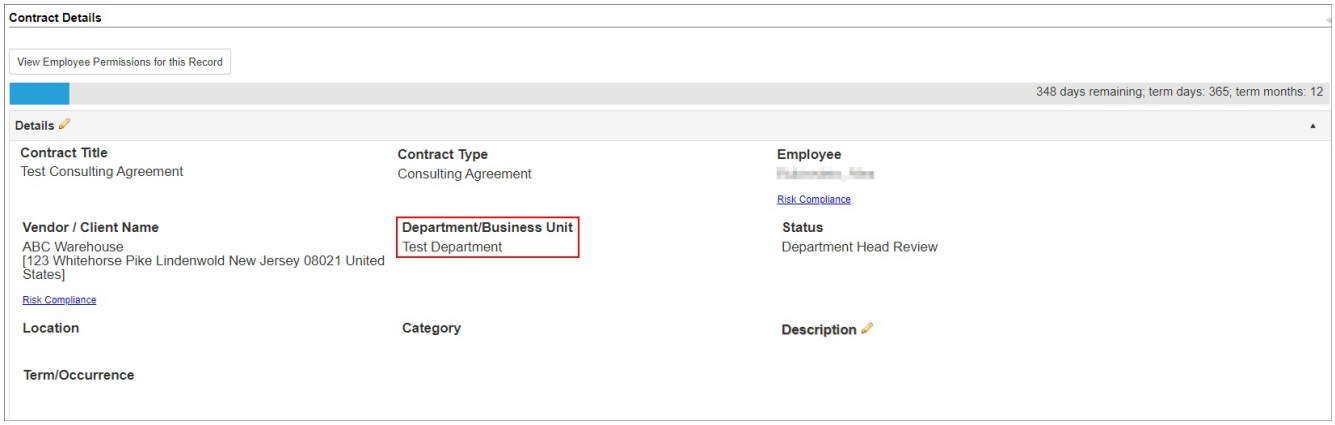
Managing & Editing a Contract Record

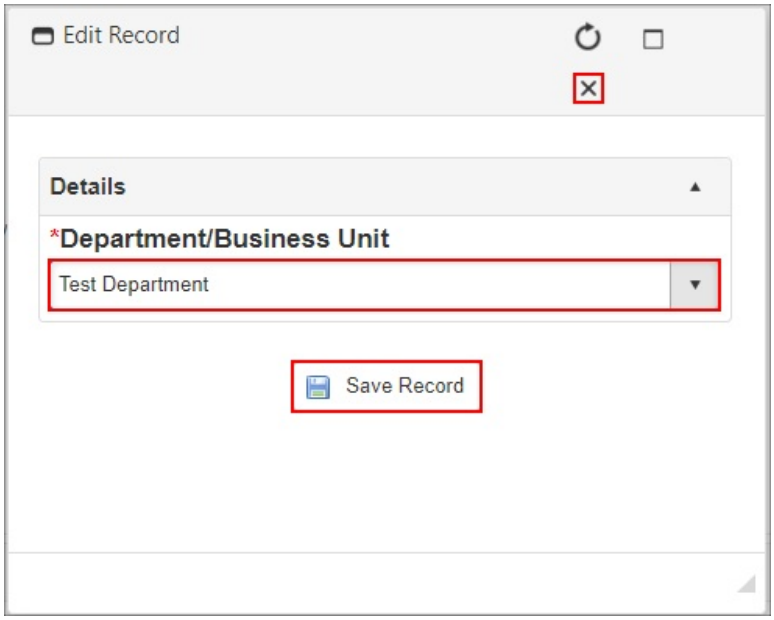
Managing & Editing a Contract Record

Contract Details: Managing & Editing a Contract

To manage/edit a contract record, go to the contract record's **Contract Details** page. To get there, search for the contract using either the **QuickSearch** method (see the **"QuickSearch"** Wiki page for instructions) or the **Find/Search** option (see the **"Find/Search Contracts"** Wiki page).

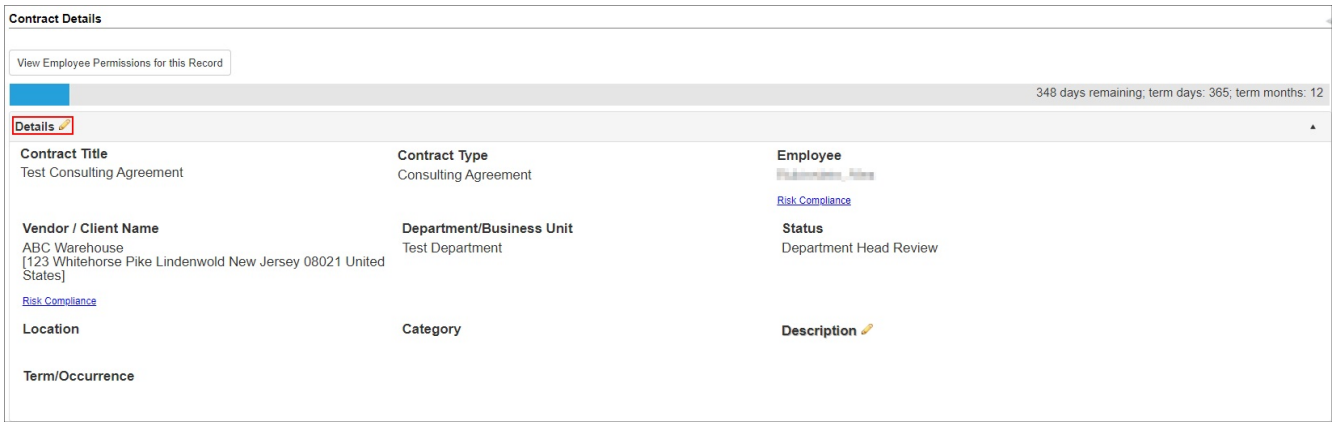
From the **Contract Details** screen, fields can be edited by hovering over the field in question and clicking the **Pencil icon** ( ).

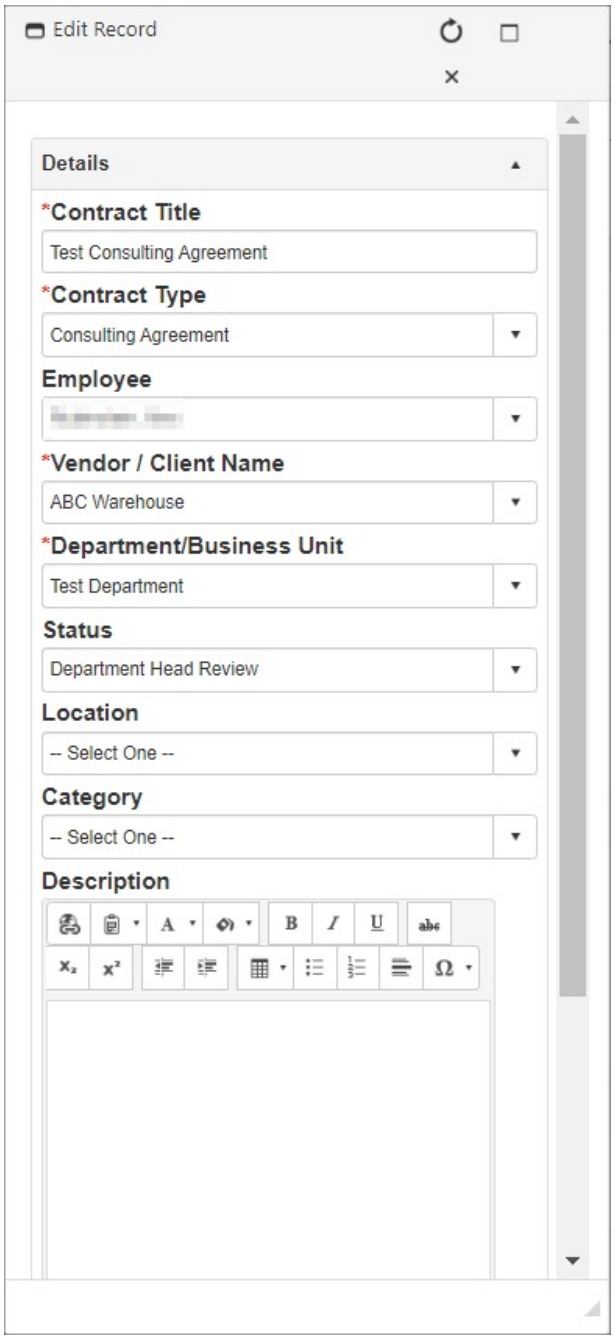




Fields can also be edited by **Field Group**. Click the **Pencil icon** ( ) next to the Field Group to edit. A similar editing module displays, but all fields assigned to the Field Group are shown. Please note that scrolling down to see the **Save Record** button may be necessary.

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Note: the **Expiration Warning Date** field is an auto-calculated field determined by the **Contract Expiration Date** minus the number of **Notify Days** entered.

When done making changes, click **Save Changes** on the editing screen. Cancel at any time by clicking the **X** on the top-right of the menu of the editing screen.

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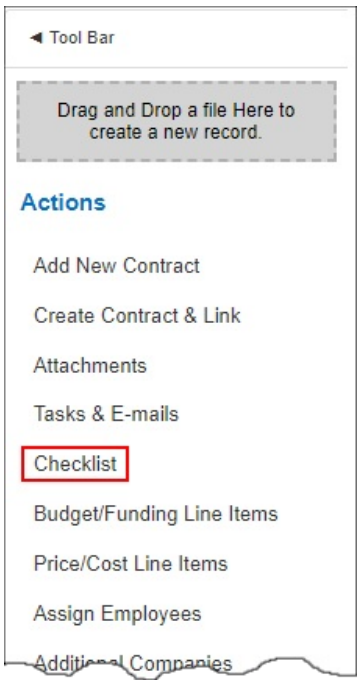
Contract Checklists & Milestones

Contract Checklists & Milestones

Contract Details: Checklists & Milestones

Contract Insight offers users a way to track milestones throughout the contract life cycle through checklists. They are best used for documenting contract status changes that occur.

Access the **Checklists & Milestones** section of the **Contract Details** screen by either clicking **Checklist** on the side menu of the page or by scrolling down the screen.x



Either method goes to the same area.

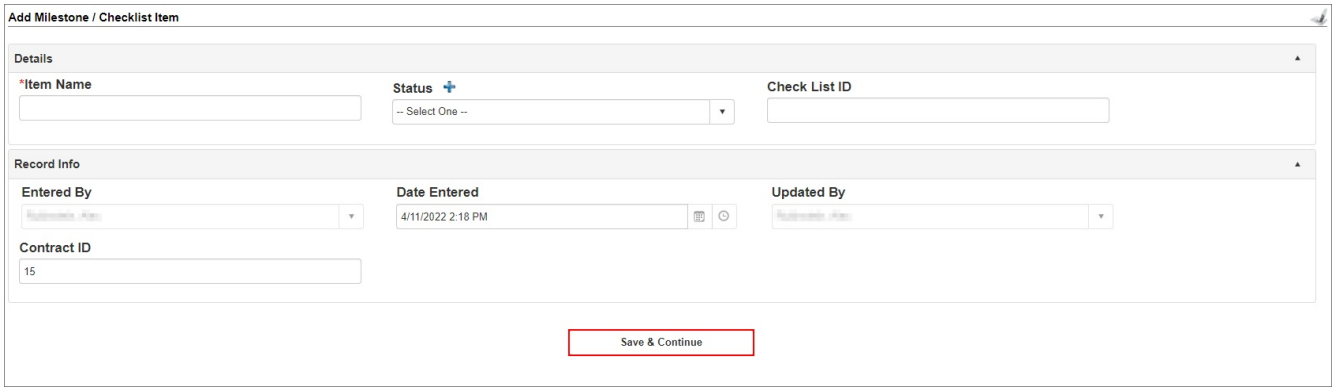


Adding a Checklist

1. Click **Add Check-list Item** in the **Checklists/Milestones** box on the **Contract Details** screen.

2. Enter all the required information to be recorded for the milestone.

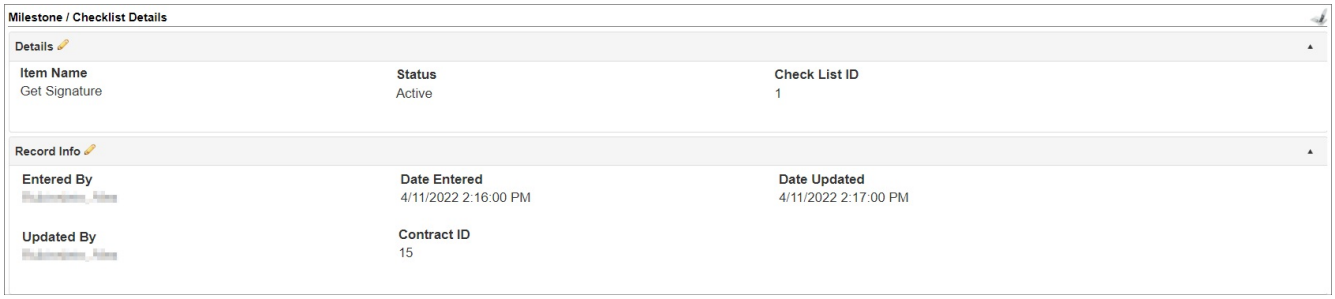
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Note: Items that are grayed out will be auto-filled by the system upon clicking **Save & Continue**.

3. Click **Save & Continue** to save the milestone and open the **Milestone/Checklist Details** screen.

4. Click **Return to Contract Details** button on the side menu to return to the **Contract Details** screen. Click **Delete Record** on the side menu to delete the milestone/checklist.



Viewing/Editing a Checklist or Milestone

1. To view/edit the milestone/checklist, click the **Pencil icon** ( ) for the line item you would like to edit. The **Milestone/Checklist Details** screen displays.

2. Click the Pencil icon ( ) next to the line item to edit to view the details and/or edit the milestone.

3. An **Edit Field** screen displays on which the value can be changed. Click **Save Record** or cancel the changes by clicking the **X** in the top-right corner of the window.

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Contract Notes & Comments

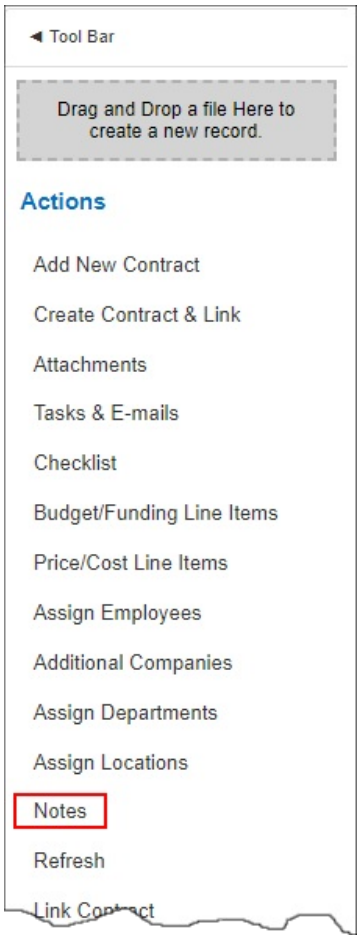
Contract Notes & Comments

Contract Details: Notes & Comments

Contract Insight provides users with the ability to add unlimited notes/comments to each contract record.

To Add a Note/Comment

1. Click **Notes** on the side menu of the **Contract Details** page or scroll to the **Notes, Comments, Diary Log** section of the page.

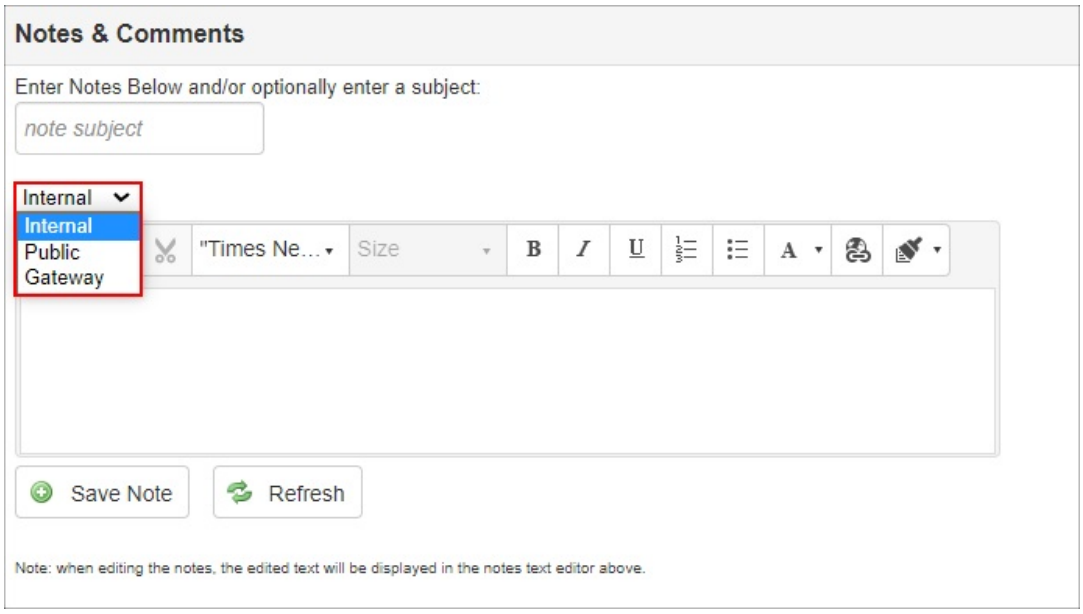


2. The **Notes, Comments, Diary Log** section displays on which users can add notes/comments in the Word-like text editor.

Note: The **Internal, Public, Gateway** drop down only needs to be specified if your organization has purchased the optional add-on module for the **Vendor/Client Gateway**. If **Public** or **Gateway** is selected and your organization has not purchased the add-on module, it will not affect any viewing capabilities of users with the proper permissions or allow the note to be viewed by anyone outside your organization.

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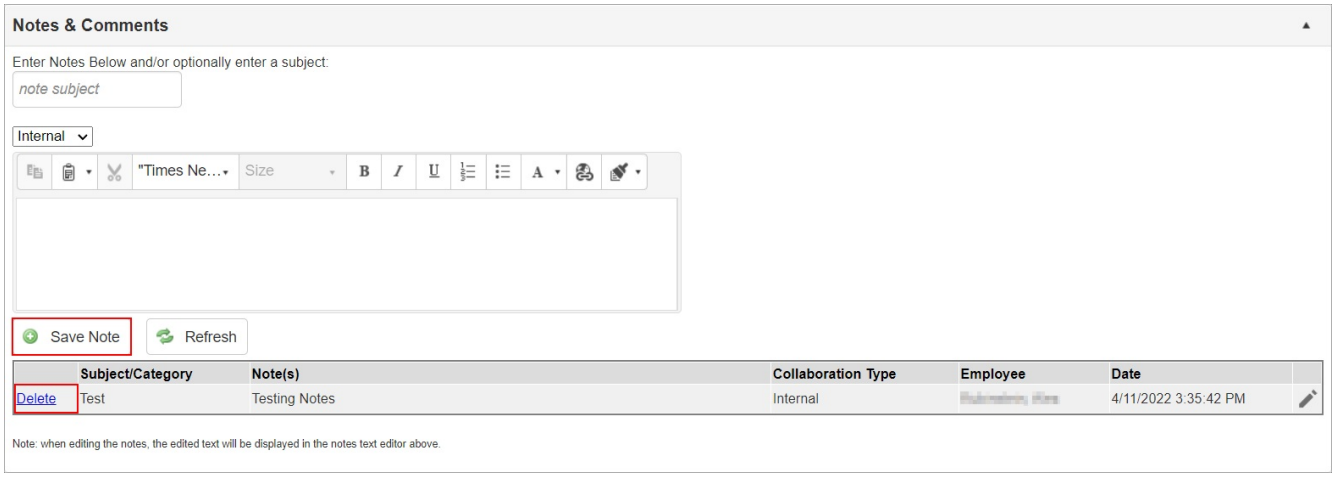
If your organization has purchased the **Vendor/Client Gateway Add-On Module**, see the Contract Notes on the Vendor/Client Gateway Wiki page for more information.



3. Click **Save Note** once you have entered the note.

4. The Notes are displayed below the notes repository.

To Edit/Delete a Note



Edit

1. Click the **Pencil icon** ( ) next to the field to be edited.

2. Perform any changes.

3. Click **Save Note**.

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Note: Editing a Note will create a new note line item so changes can be tracked for notes.

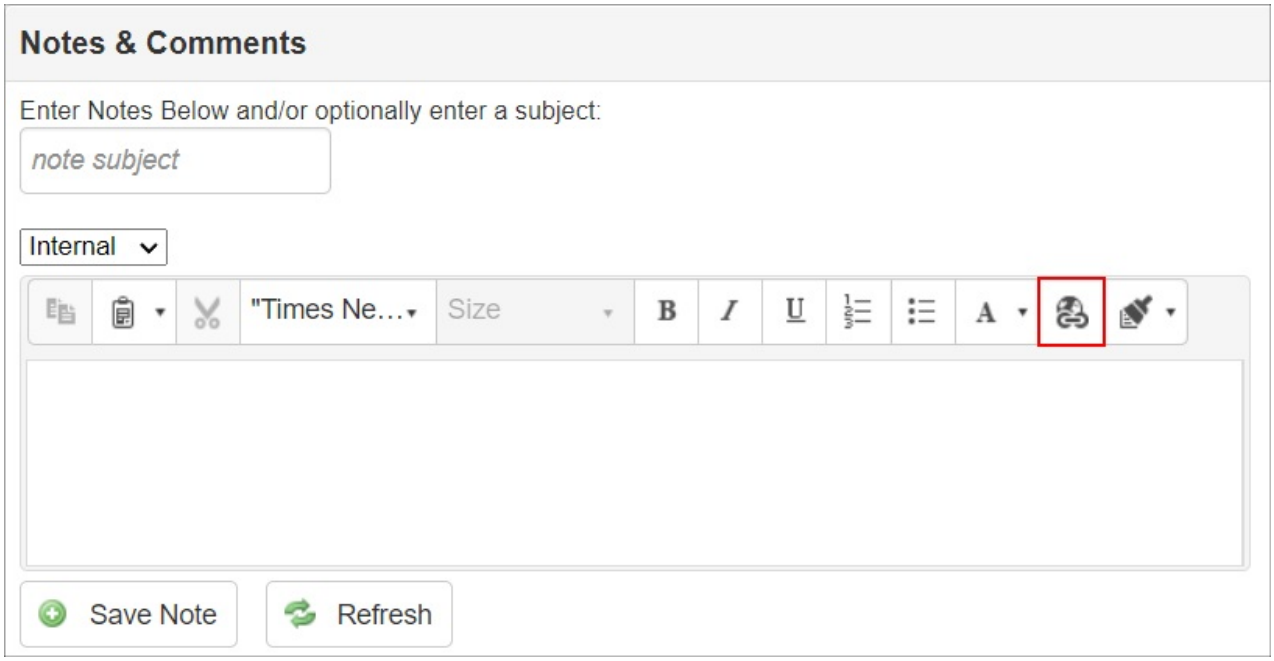
Delete

1. Click **Delete** next to the note you would like to remove.

2. Confirm the deletion.

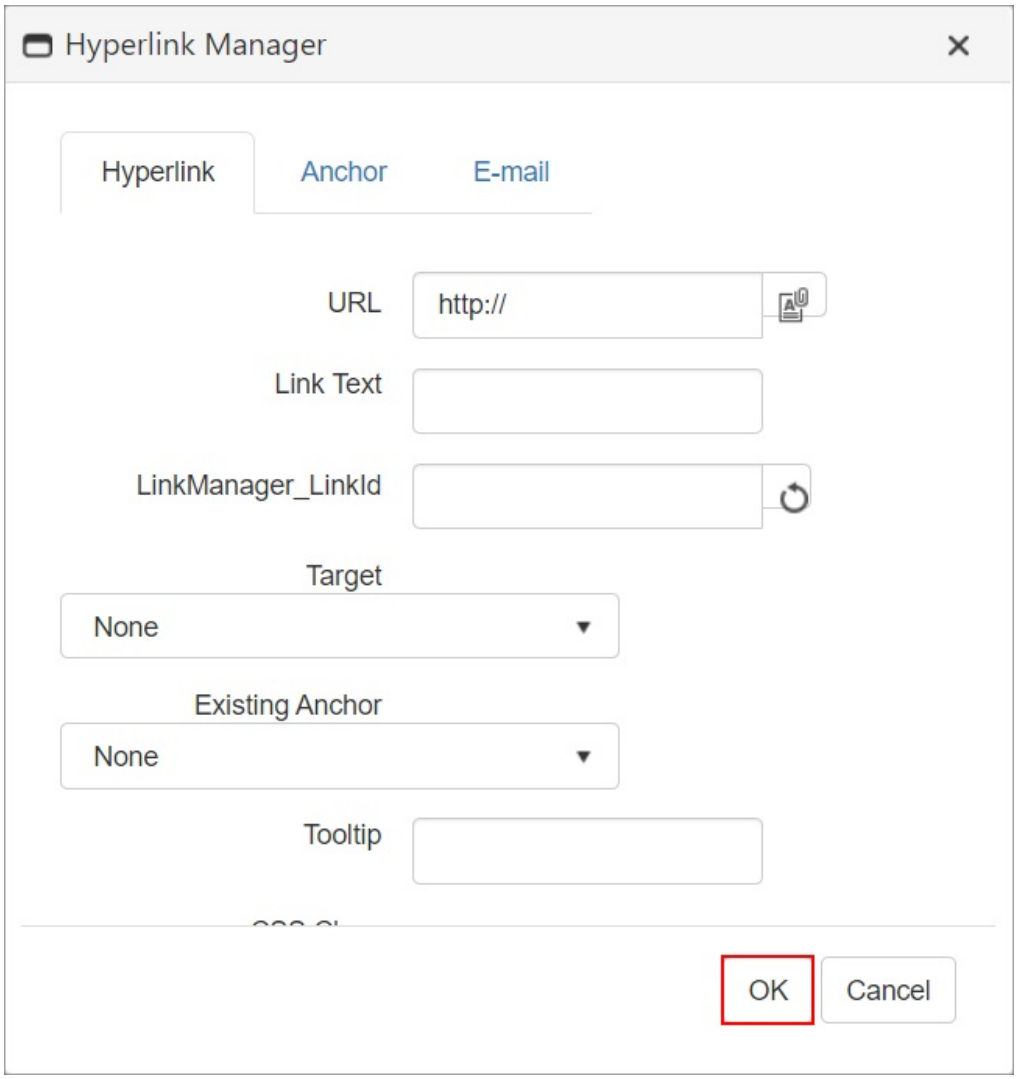
Add a Hyperlink

1. Click the **hyperlink manager icon**.



2. Enter the web address, hyperlink text, and other required data. Click **OK** when done editing the data.

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3. The hyperlink text appears in the note. Click **Save Note** to save the changes.

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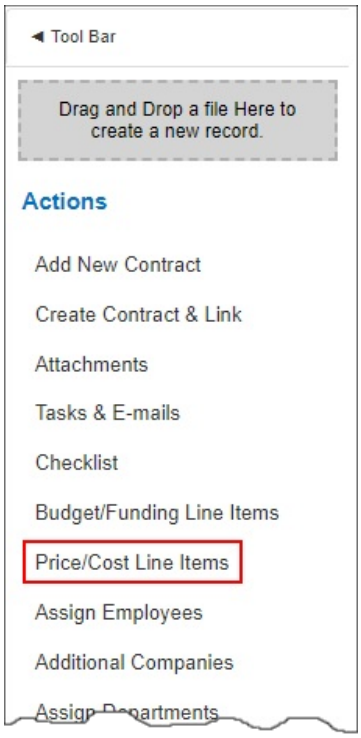
Contract Price/Cost Schedule

Contract Price/Cost Schedule

Contract Details: Price & Cost Scheduling

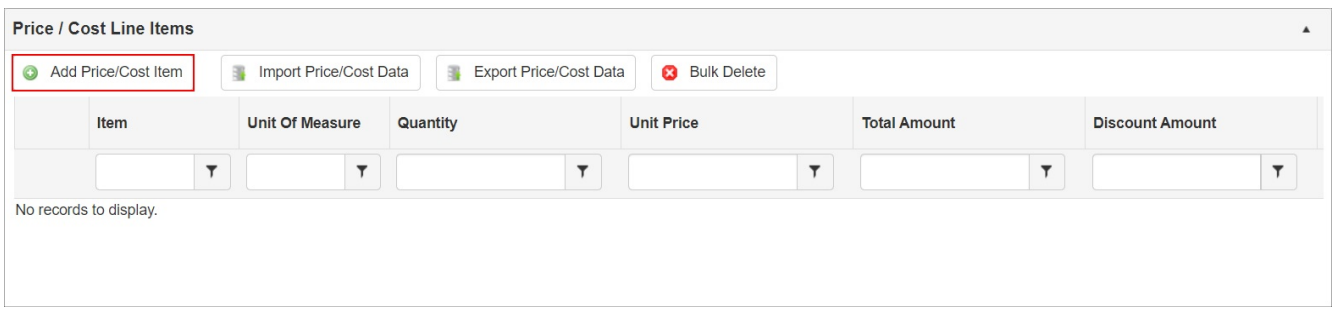
Contract Insight supports the ability to track pricing and contract costs by line item. Typically, contracts have an overall value (cost/price). The **Price/Cost Schedule** function of a contract can be viewed, added to, and edited from the **Contract Details** screen.

Access the **Price/Cost Scheduling** section of the **Contract Details screen** by either clicking **Price/Cost Line Items** on the side menu of the screen or by scrolling down the area. Both methods go to the same section.



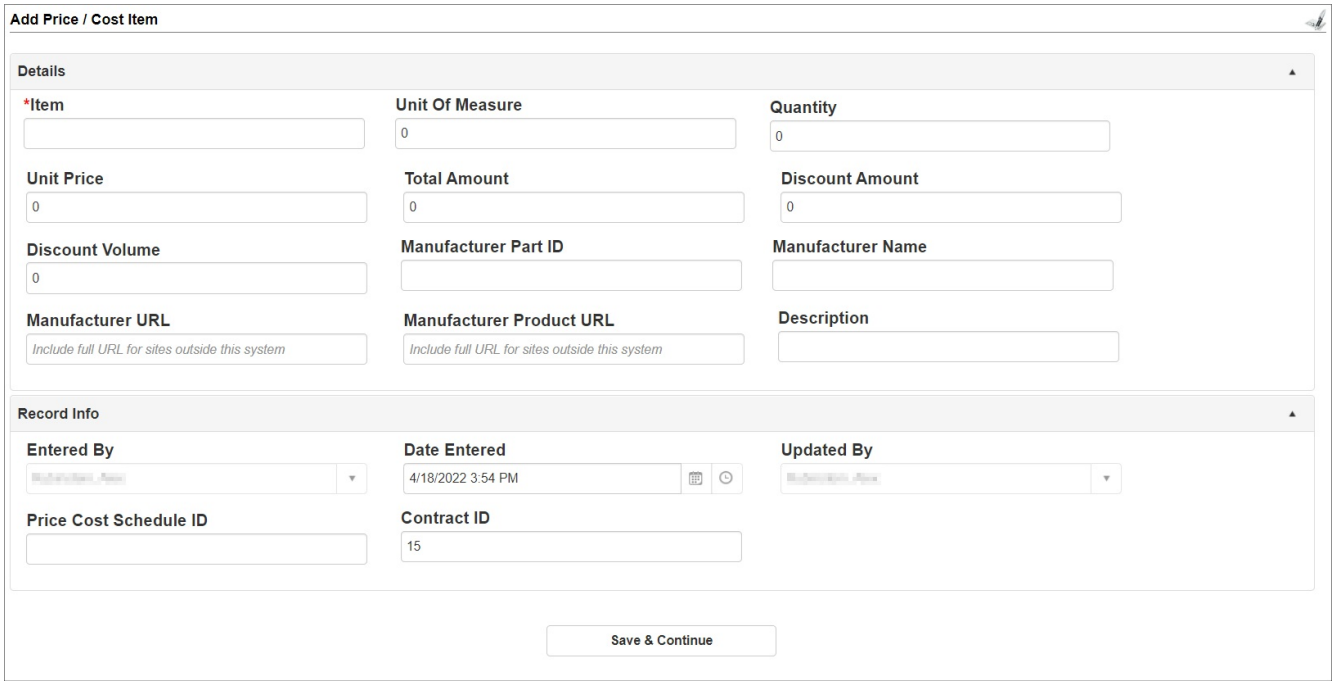
Adding a Price/Cost Schedule

1. Click **Add Price/Cost Line Item.**

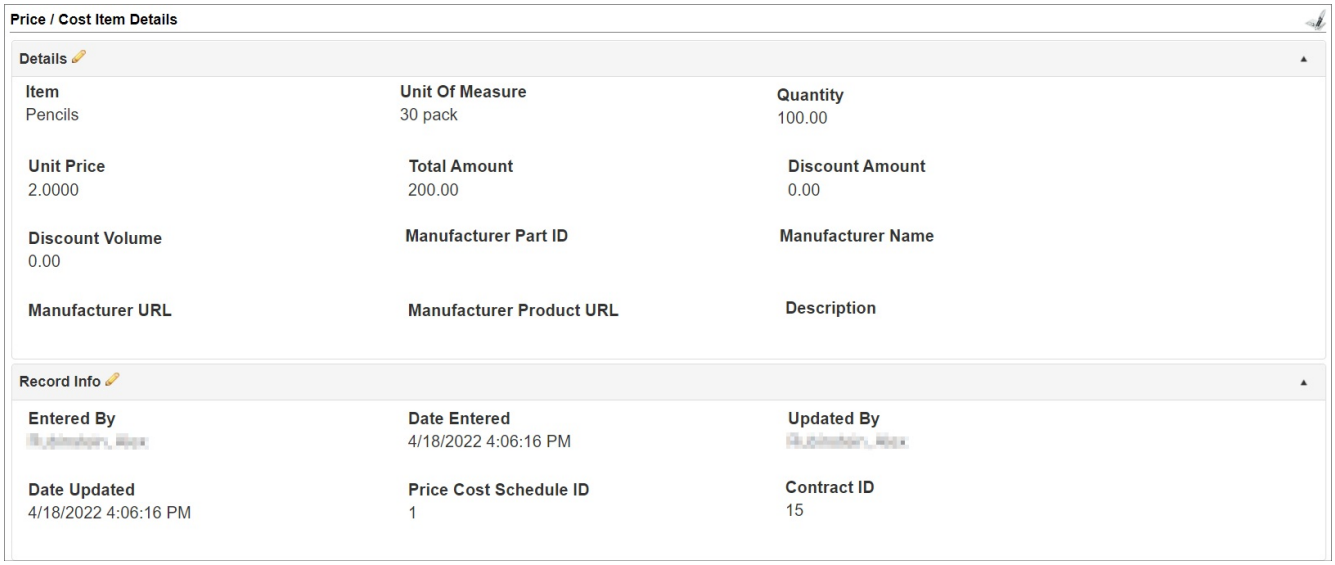


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2. The **Add Price/Cost Item** screen displays. Enter the necessary data and click **Save & Continue** to save the data entered.



3. The **Price/Cost Schedule Details** screen displays to show what was entered and saved for the new line item.



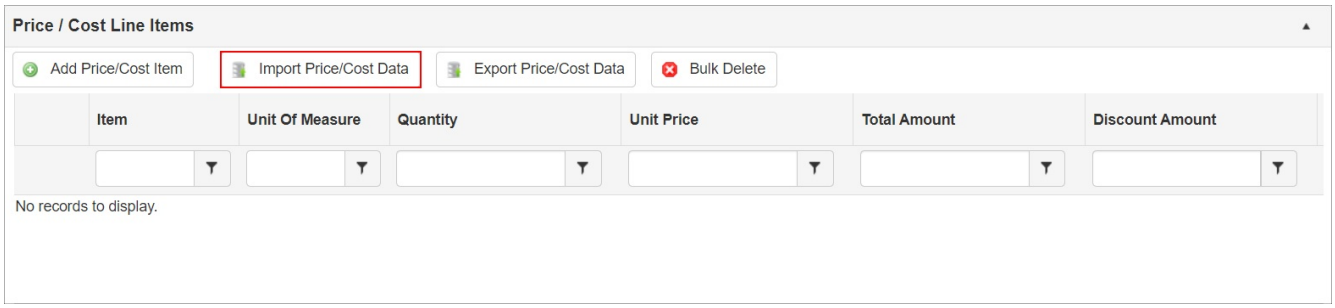
4. Click **Return to Contract Details** on the side menu to return to the **Contract Details** screen for this item.

Import Price/Cost Data

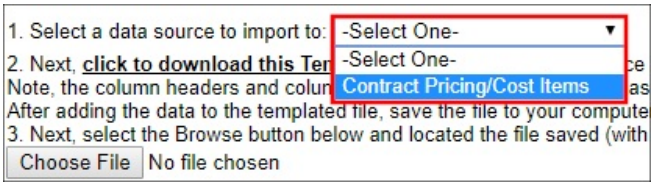
Contract Insight users have the capability to import new and/or existing price/cost schedules to a contract.

1. Click **Import Price/Cost Data** in the **Price/Cost Line Items** section of the **Contract Details** screen.

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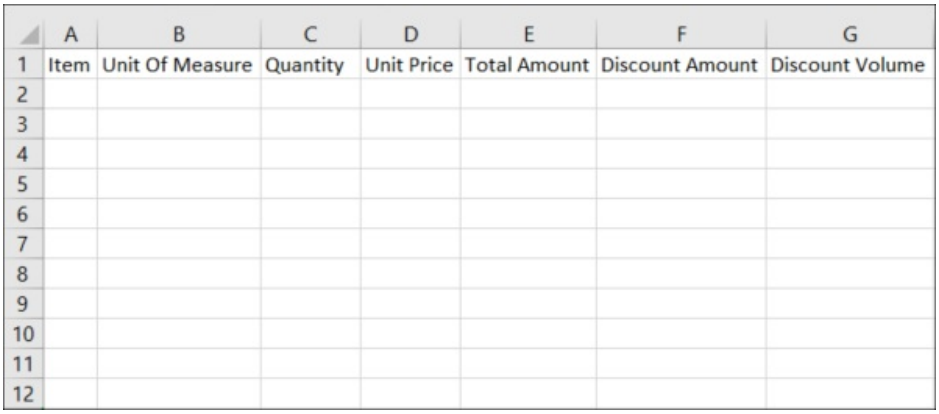
2. Select the data source



3. Click **click to download this Template file** to download an Excel importing template.

4. A dialogue box opens and asks to save the template.

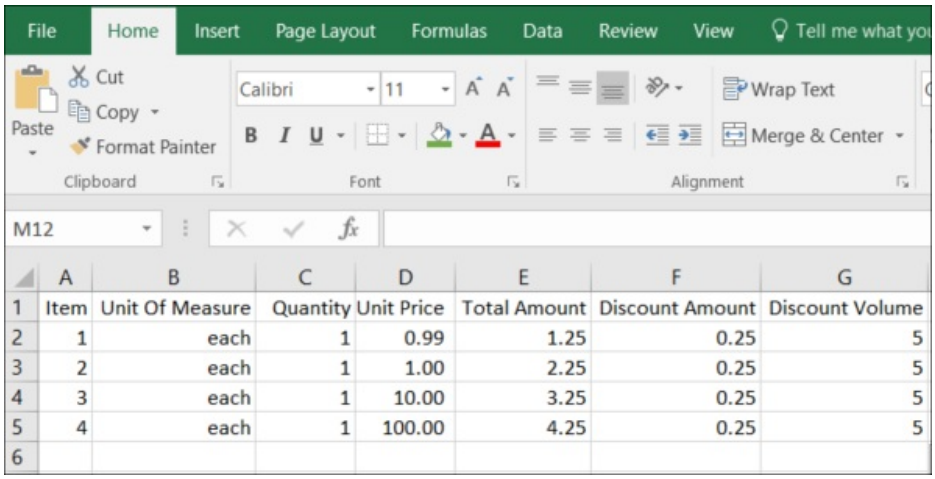
5. From here, enter all data that to import to the **Price/Cost Schedule**.



Note: Column headers and names must remain the same as how they are downloaded in the sample document.

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6. Once all information is entered, click **File** > **Save As** and name your document. Make sure the file is saved as a **.csv** file and click **Save**. Be sure to note the save location.

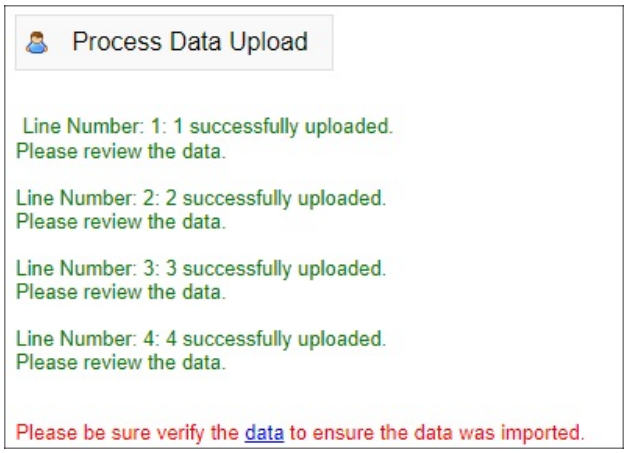


	A	B	C	D	E	F	G
1	Item	Unit Of Measure	Quantity	Unit Price	Total Amount	Discount Amount	Discount Volume
2	1	each	1	0.99	1.25	0.25	5
3	2	each	1	1.00	2.25	0.25	5
4	3	each	1	10.00	3.25	0.25	5
5	4	each	1	100.00	4.25	0.25	5
6							

7. On the Contract Insight **Import Contract Price/Cost Data** screen, click **Browse** and select the location to which the .csv file just created was saved.

8. Click **Open** and the file name appears to the left of the **Browse** button in the text box.

9. Click **Upload CSV** and the screen verifies if the document was uploaded successfully.



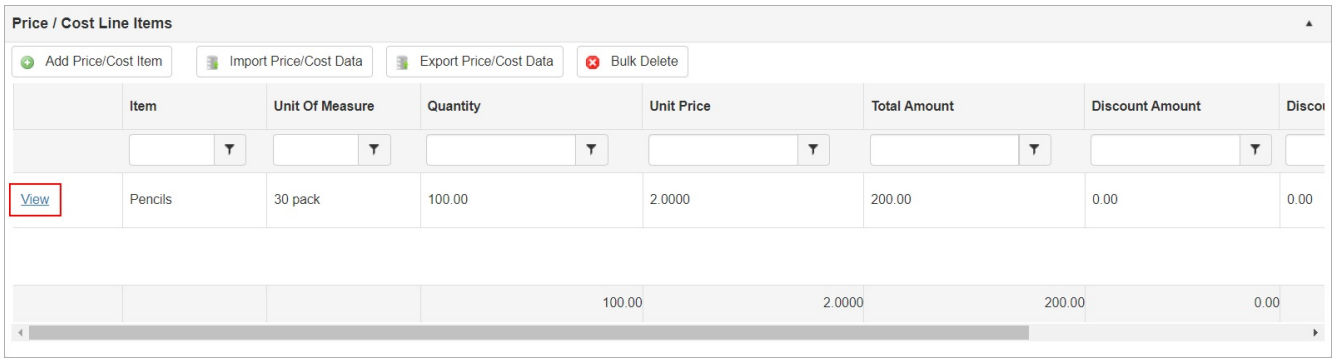
10. Click **Data** to verify the data was imported.

Note: CobbleStone Software best practices recommend uploading and saving the original price/cost document to the **Attached Files, Documents, Images** section of the **Contract Details** page for auditing purposes. For instructions on how to attach files and documents, see the Contract Attachments page.

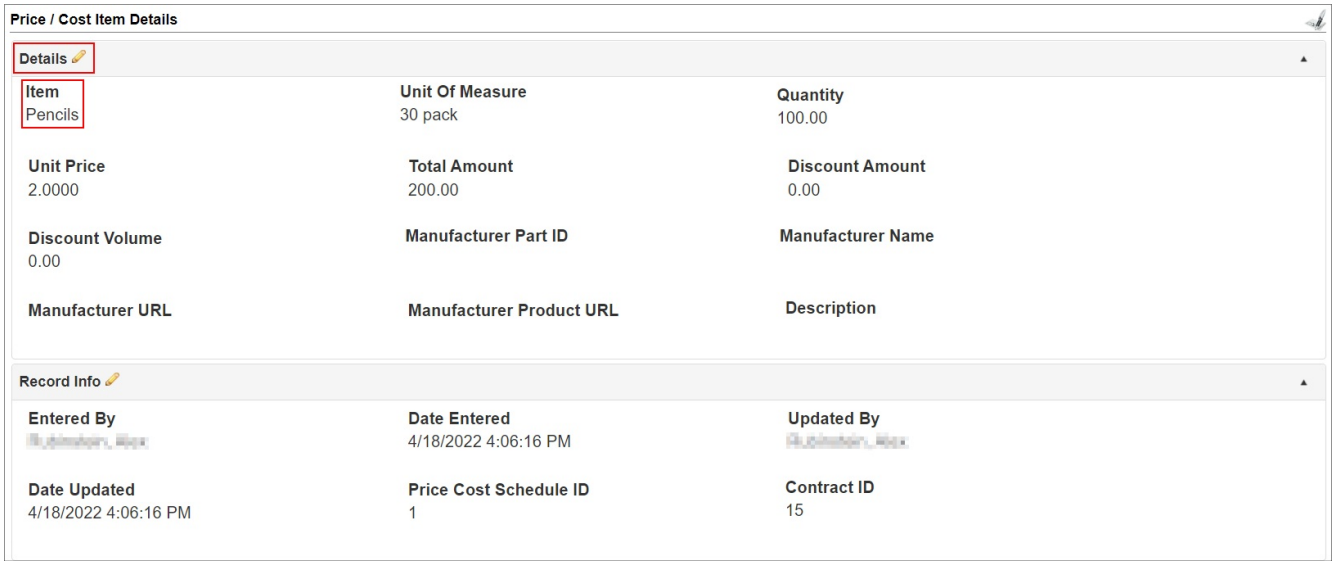
Viewing & Editing Price/Cost Schedule Line Items

1. Click **View** for the line item in the price/cost schedule to edit.

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2. The **Price/Cost Item Details** screen displays.



3. Click the **Pencil icon** ( ) for the line item to edit. Click the **Pencil icon** ( ) for the **Field Group** to edit multiple fields at once.

4. Edit the item in the **Edit Field** screen. Click **Save Record** to save the changes or click the **X** in the top-right to cancel the changes.

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Contract Financials

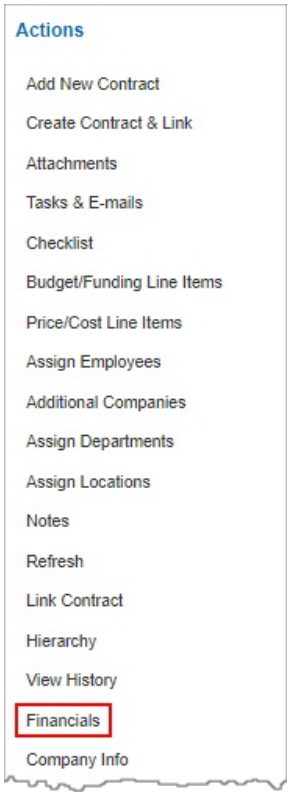
Contract Financials

Contract Details: Financials

CobbleStone enables users to track financials data for budgets, etc. for each contract record.

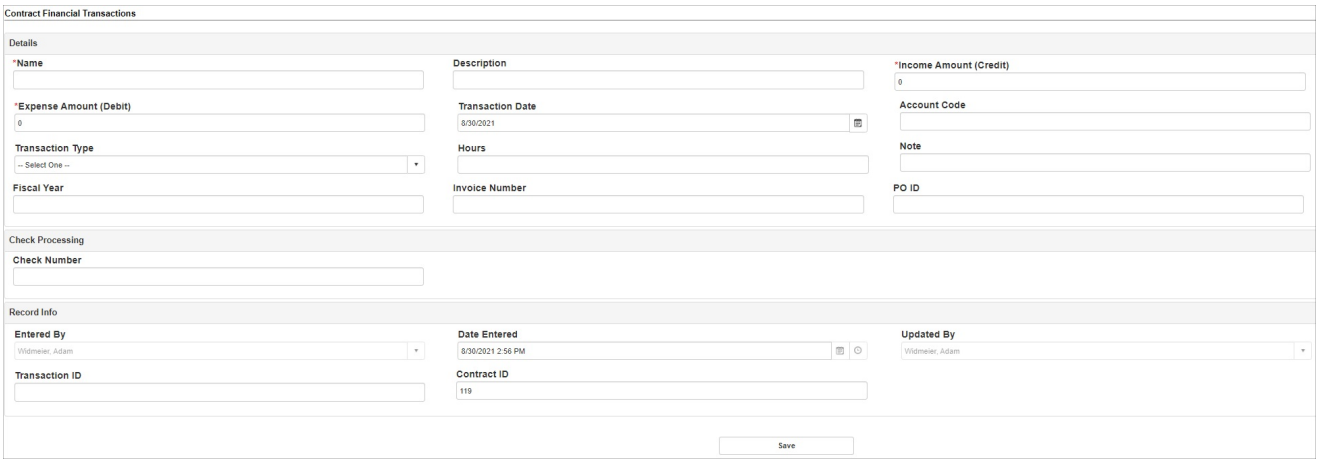
Add a Financial Transaction for a Contract

1. Click **Financials** on the side menu of the **Contract Details** screen.



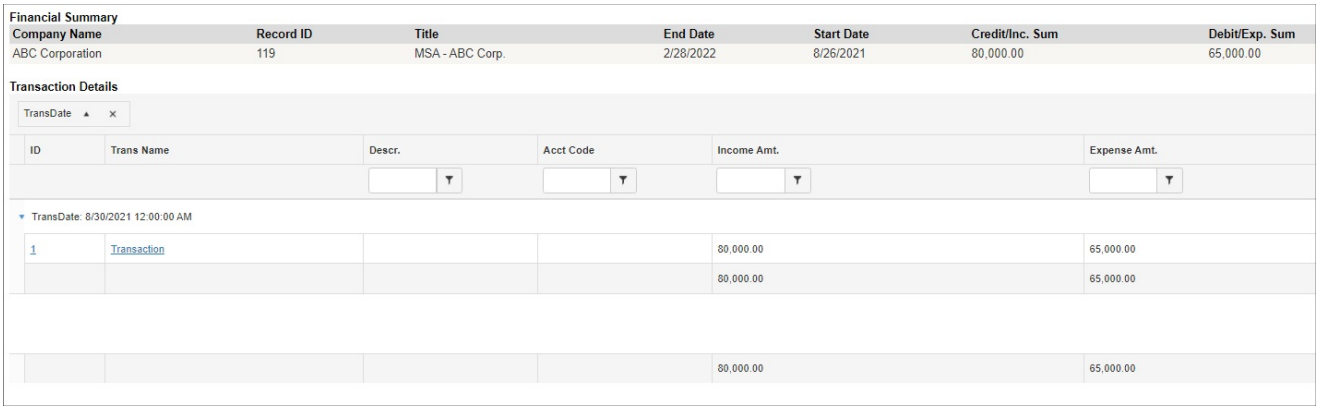
2. The **Contract Financial Transactions** screen displays.

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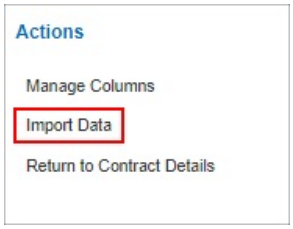
3. Enter the necessary information. Click **Save** to save the transaction information or click **Return to Contract Details** on the side menu of the **Add Transaction** screen to abandon the addition.

4. The information entered is added to the **Transaction Details** and **Financial Summary** tables located below the **Save** button.



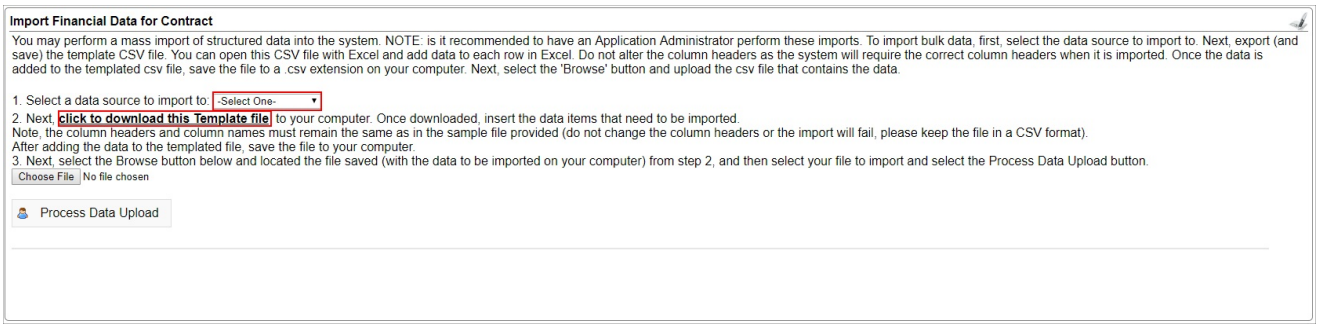
Import Financial Data

1. Click **Import Data** on the side menu of the **Add Transaction** screen.



2. The **Import Data** screen displays.

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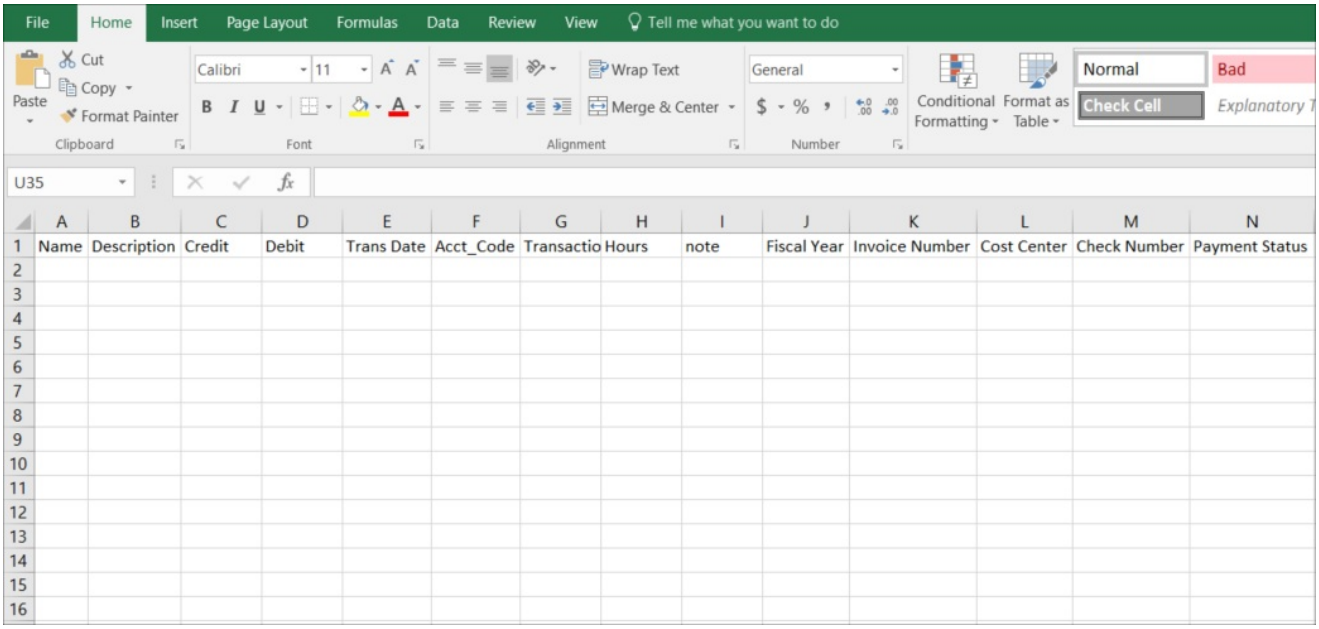


3. Select the import destination from the drop down menu.

4. Click **Click to download this Template file**.

5. Choose the destination for the template.

6. The template opens in Excel.

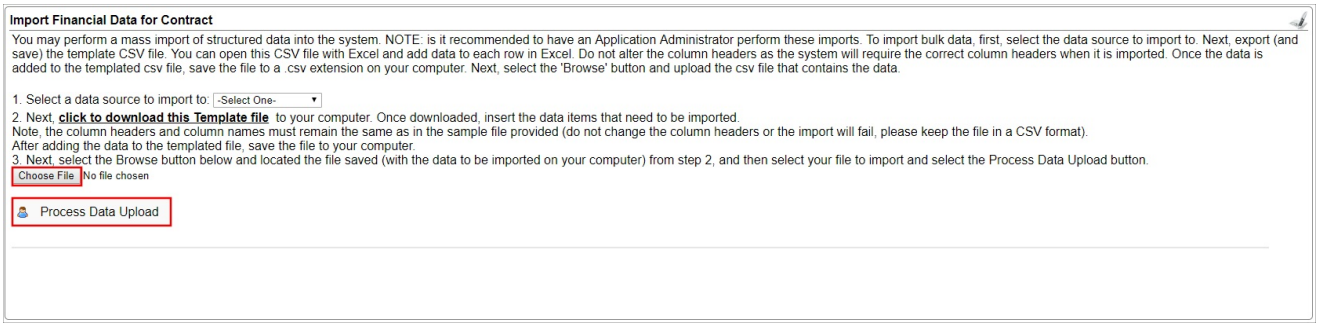


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7. Enter the necessary data for each column.

8. Save the file as a **.csv** file to your computer.

9. Click **Choose File** on the **Import Data** screen in Contract Insight. Find and select the .csv file previously saved.



10. After selecting the file, the file address appears in the text box next to **Browse.** Click **Process Data Upload**. The data will show below on the screen.

Note: A budget alert is sent automatically from your Contract Insight system once the contract's total incurred amount in the **Financials** section has reached a threshold. The system is defaulted to send the alert when the total incurred amount reaches 80% of the defined budget amount.

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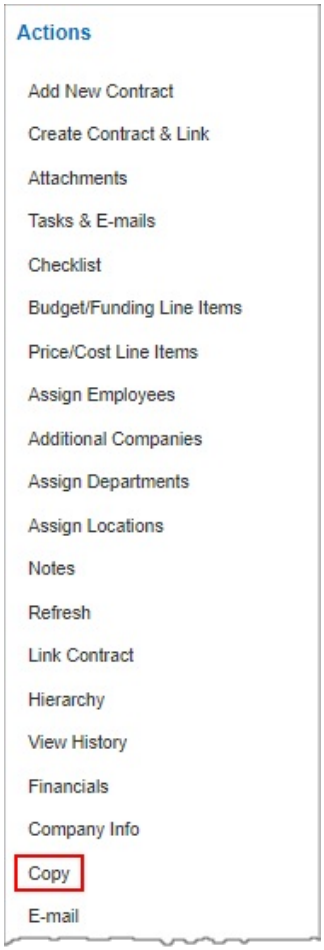
Copy a Contract Record

Copy a Contract Record

Contract Details: Copy a Contract Record

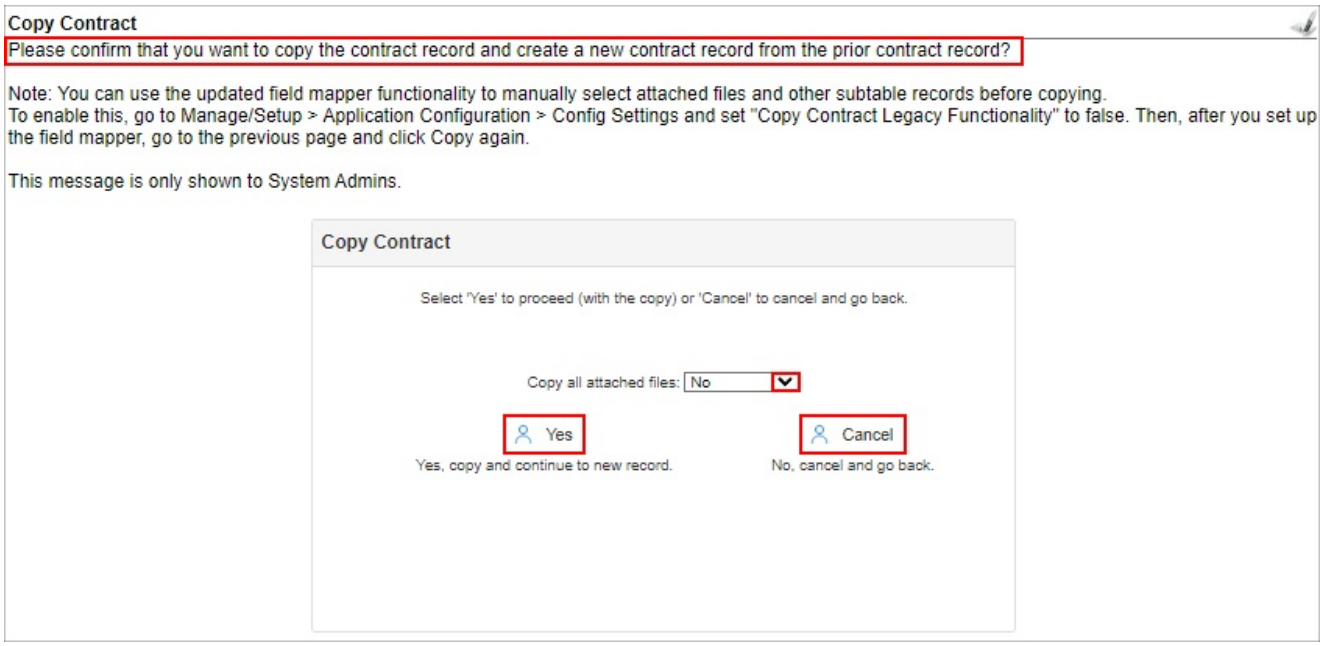
Contract Insight enables users to copy contracts. This can be useful for auto-renewing a contract (copy a contract and update information by way of editing fields).

1. Click **Copy** on the side menu of the **Contract Details** screen.



2. The **Copy Contract** screen displays. Select if all files/documents attached to the original contract record (the record you are copying) are to be copied to the new contract record using the **Yes/No** drop down box.

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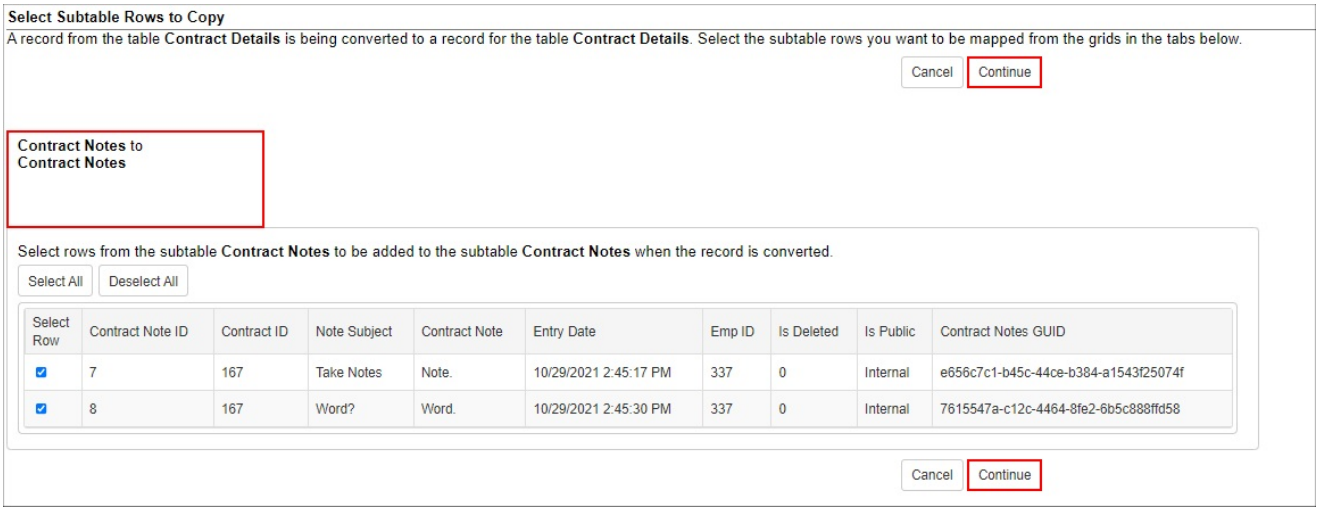


4. Click **Yes** to copy the contract to make a new record or click **Cancel** to cancel copying and return to the **Contract Details** screen.

5. If **Yes** is selected, a new contract record will be made with the same information as the original contract.

6. The **Contract Details** screen of the **new** contract record displays on which users can change and update the information as needed.

If, in the **Application Configuration** menu, Copy Contract Legacy Functionality is turned to false, the user will be prompted to select what sub-table information should be brought forward onto the new contract record. Each sub-table will appear as a tab in which the user may select to prevent scrolling on one, continuous screen.



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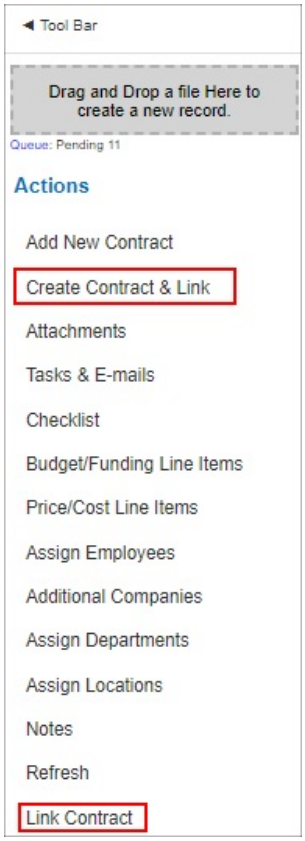
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Link Contracts

Link Contracts

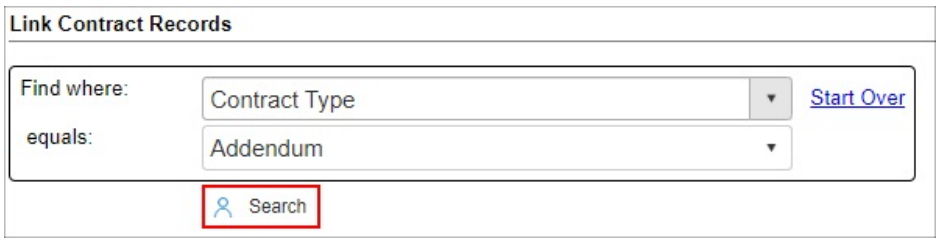
Contract Details: Link Contract Records

CobbleStone supports the ability to link a contract record to another contract record that has already been created in your CobbleStone system, or create a new contract and link the current contract record to the newly created record.



1. Click **Link Contracts** to add a new contract link; click **Create Contract & Link** to navigate to the **Contract Add** screen.This contract will be automatically linked to the previous contract.

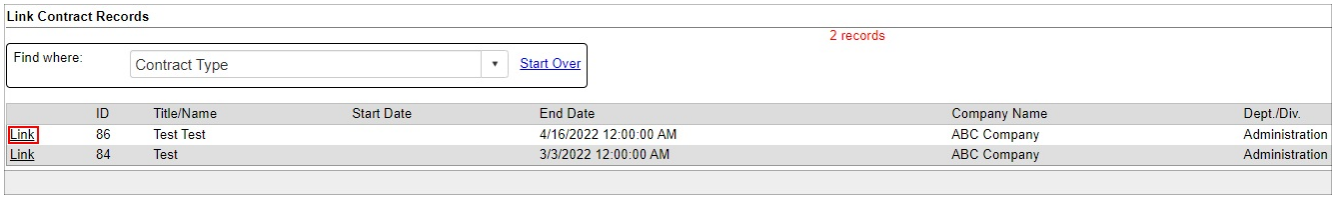
2. The **Link Contracts** screen displays on which the contract for which a link should be formed can be located.



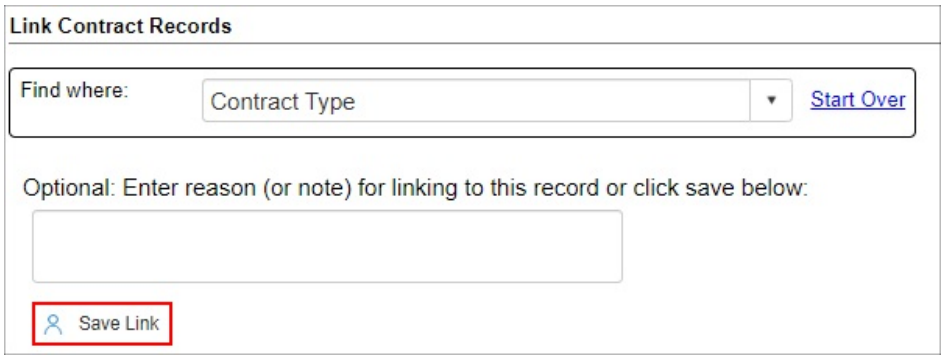
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5. In the drop down box to the right of **Find where**, select the category by which to search. Enter a keyword(s) in the text box to the right of **is like** or **equals**.

6. Click **Search** to display all contract records that meet the specified criteria.



7. Click **Link** for the contract line item to which to link to the contract. A prompt to (optionally) add a reason/note for linking the contract displays.



8. When finished, click **Save Link**.

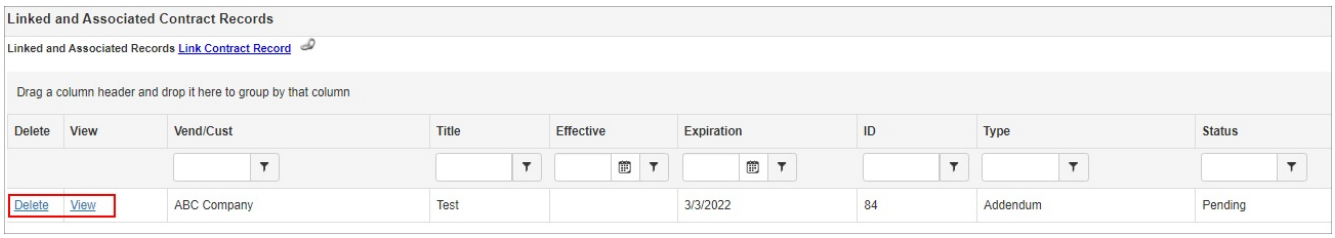
Note: At any time, click **Return to Contract Details** on the menu of the **Link Contracts** screen to cancel linking a contract.

9. The **Contract Details** page displays. Verify that the contract link was added to the **Linked and Associated Contracts** section.

To View the Details of a Contract Link

1. Click **View** for the line item on the contract in the **Linked and Associated Contracts** section.

2. The **Contract Details** screen for the contract that was linked displays

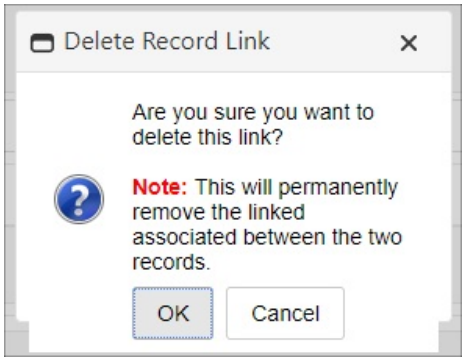


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To Remove a Link

1. Click **Delete** for the line item on the contract in the **Linked and Associated Contracts** section.

2. A verification box displays.



3. Click **OK** to confirm and remove the link between the contracts and return to the **Contract Details** screen.

4. Click **Cancel** to cancel the removal of the link and return to the **Contract Details** screen.

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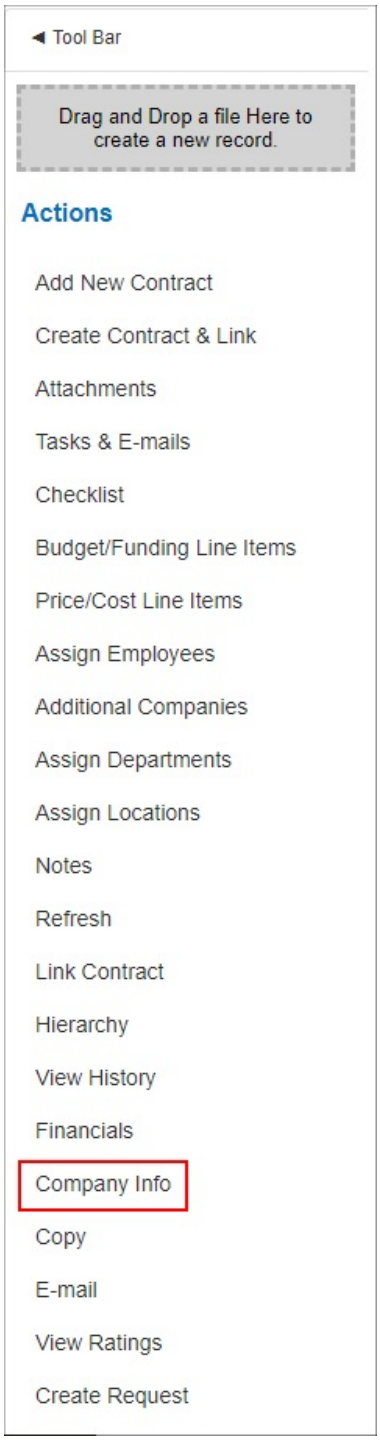
Contract Company Information

Contract Company Information

Company Info

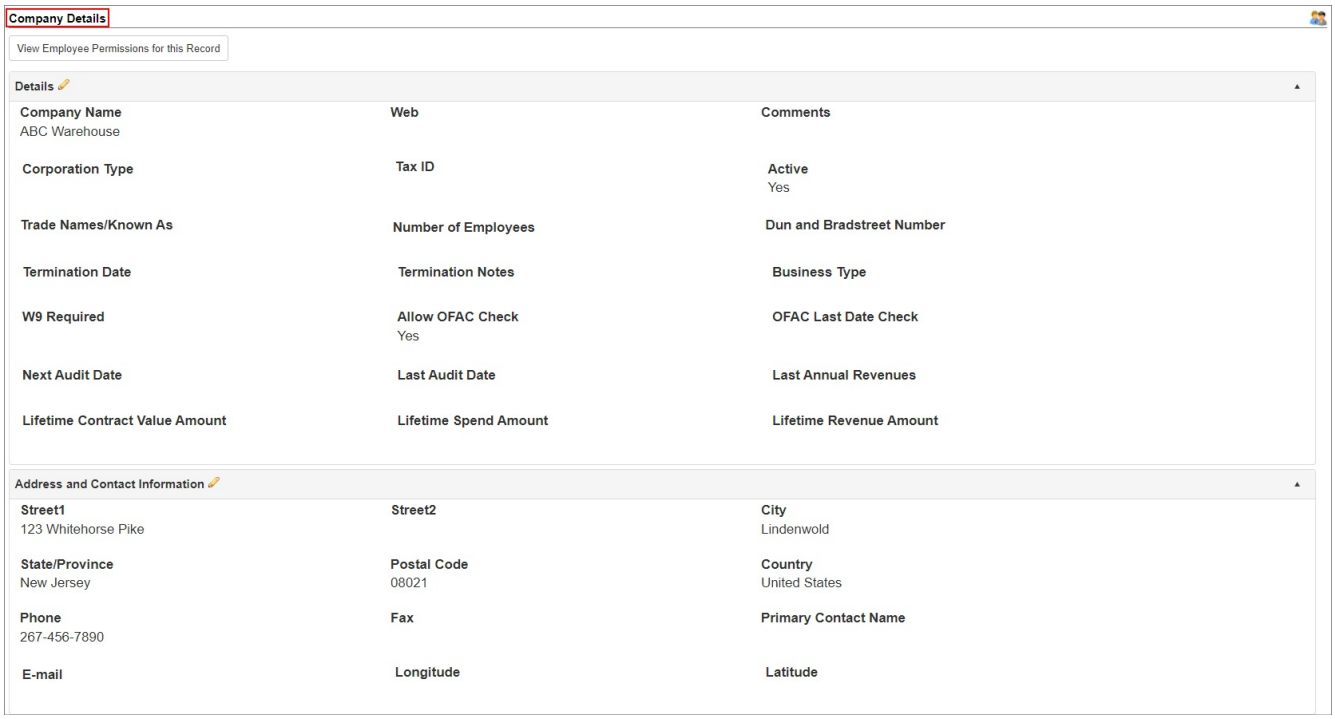
Contract Insight enables the user to view the company's details page from the **Contract Details** screen.

1. Click **Company Info** on the side menu of the **Contract Details** screen.



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2. The **Company Details** screen displays.



3. See the "**View Company Details**" Wiki Page for more information on the Company Details screen.

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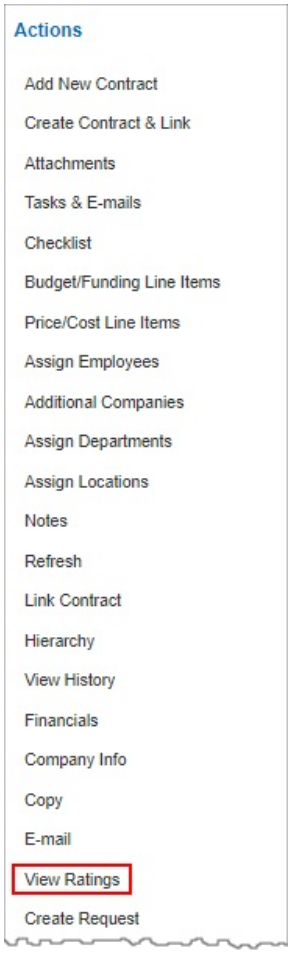
View Vendor/Client Ratings

View Vendor/Client Ratings

Contract Details: Viewing Vendor/Client Ratings/Scores

Contract Insight enables users to add/view ratings for a company both through the **Contract Details** screen and the **Company Details** screen.

1. To access the **Vendor Client Rating** screen, click **View Ratings** from the **Contract Details** screen on the side menu.



a. If accessing through the **Company Details** screen, click **Rate Company** on the side menu. This will rate the company you are viewing in the **Company Details** screen.

b. See the Company/Vendor Rating & Scorecard Wiki page for further information of how to add a company rating.

2. By selecting **View Ratings** from the "**Contract Details** screen's side menu. The **Vendor Client Rating** screen displays.

3. **The Rating and Score Card Summary** table is where a company's ratings that have already been submitted will appear.

4. To edit what columns appear in the **Rating and Score Card Summary** table, click **Add Columns**.

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View Contract History

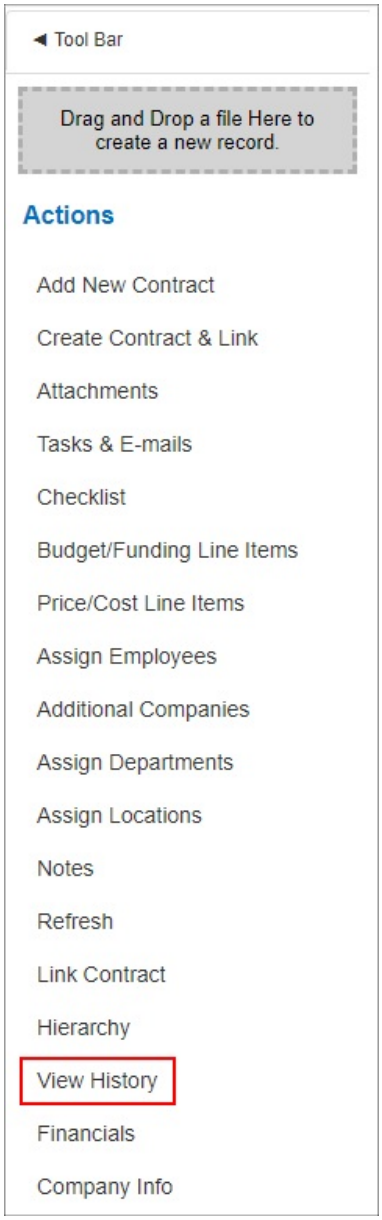
View Contract History

Contract Details: Viewing a Contract's History

Contract Insight allows users to view the activity log for each contract.

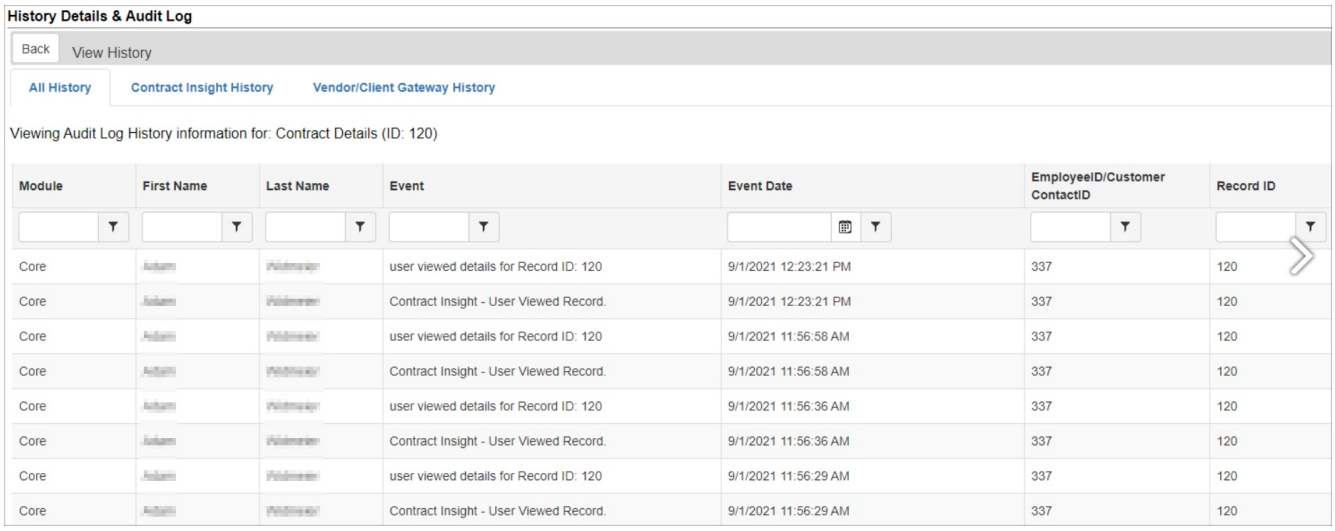
Viewing a History Log

1. Click **View History** on the side menu of the **Contract Details** screen.



2. The **History Details** screen for the contract record displays.

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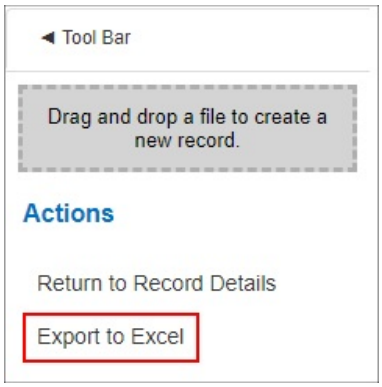


This screen allows you to view the details for each event related to the contract. This includes the employee's first and last name, the event that took place (such as viewing the contract), the date the event occurred, the employee's ID, the contract's record ID, as well as the table name.

Exporting an Activity Log

From this screen, a user may also export the history details table to MS Excel.

1. Click **Export to Excel** on the side menu of the **History Detail** screen.



2. Upon selecting **Export to Excel**, the export may immediately start downloading or a pop-up menu asks to either **Open** or **Save** the file.

3. Click **Open With** and click **OK** in the box. An alert may appear telling you that the file is in a different format than the file extension, to verify that you trust the source, and would you like to continue opening the file.

4. Click **Yes** to continue to export the file to MS Excel.

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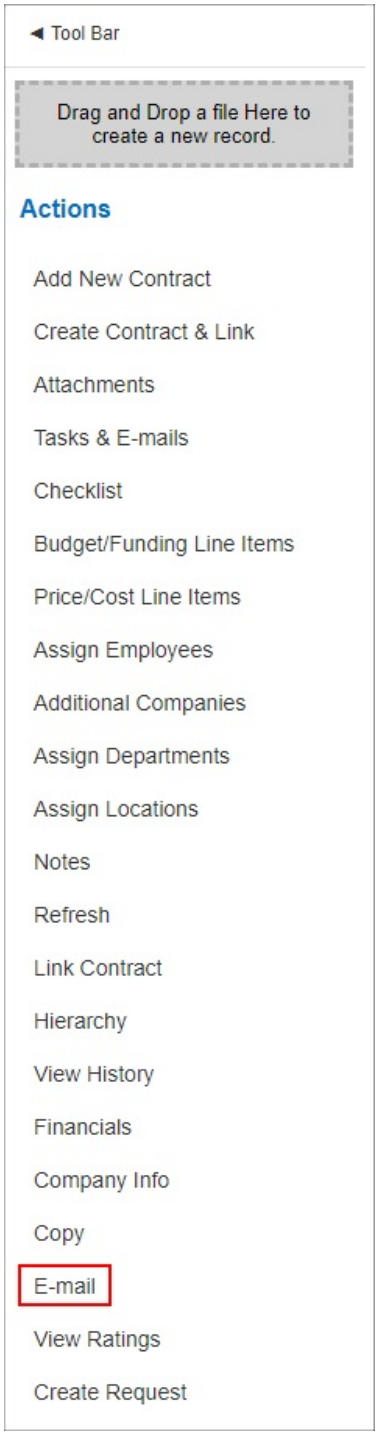
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Send E-mail From Contract Record

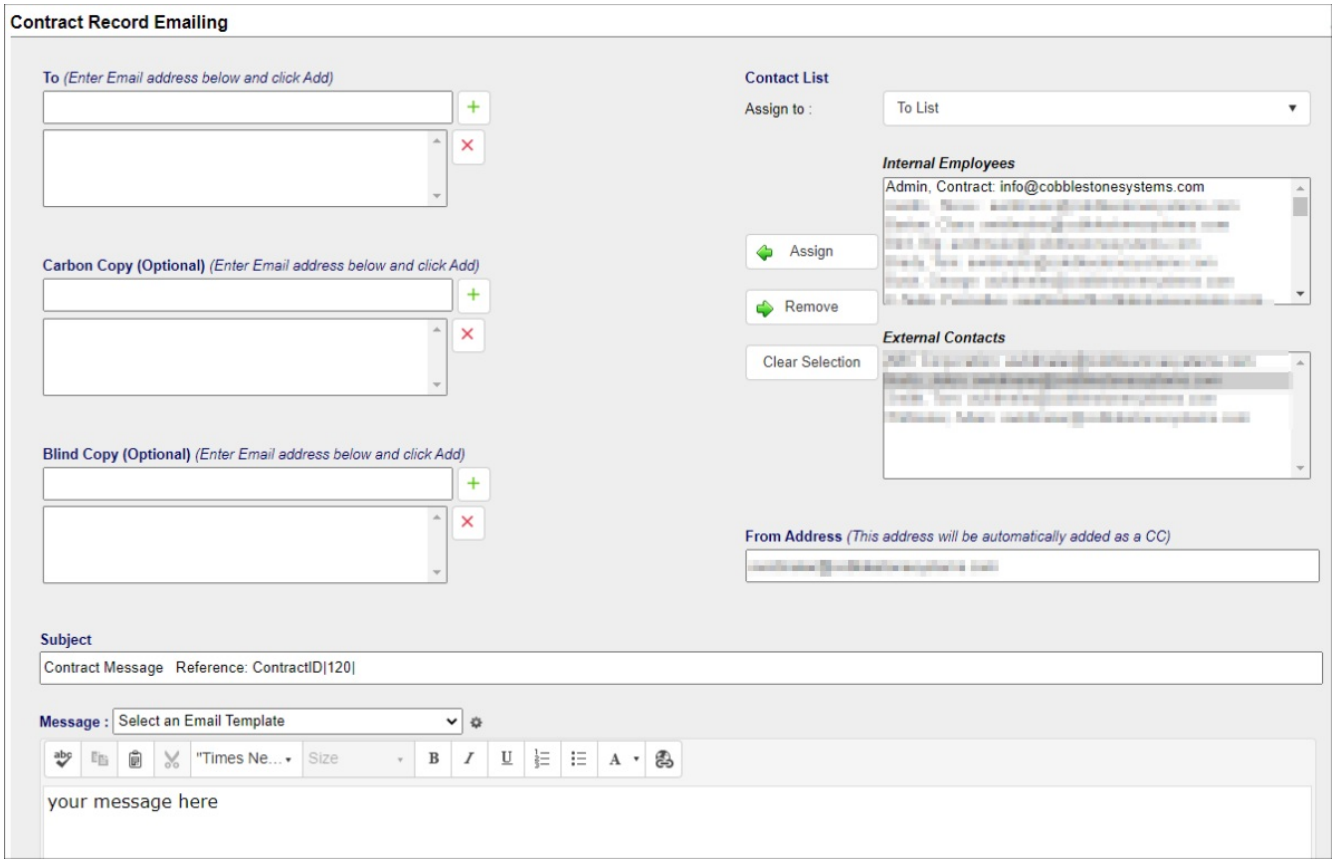
Send E-mail from Contract Record

Contract Details: Send E-mail from Contract Record

Contract Insight allows users to send one-off e-mails to users and non-users of the system from each individual record's Contract Details page. To access the **Send E-mail** screen, navigate to any **Contract Record Details** screen and click **E-mail** on the side menu. The Send E-mail screen displays.



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The right-hand box will automatically populate with e-mail addresses for all internal and external company contacts. To send e-mails to specific individuals, select each e-mail address and click **Assign** to add them to the **Recipient List**. Optionally, manually enter e-mail addresses to the **Copy To** section so other users can receive a copy of the email. Users then have the option to customize a message and optionally attach files from the **Files/Attachments** section of the contract record. Once done crafting the message and attaching the necessary files (if required), click **Send E-mail** to send the e-mail to the assigned recipients.

Note: Any time a on-off email is sent, a note is added to that record's **Notes/Comments** section.

E-mail Templates

The Send E-mail functionality also includes configurable e-mail templates for standardization and ease of use. To utilize an existing e-mail template, select the desired template from the drop-down list above the Message box. To configure a new e-mail template, click the **gear icon** ( ) next to the drop-down menu.

Note: Only Application Administrators can add/delete templates.

The E-mail Template Manager list will appear. To add a new template, click **Add Record** on the top-left of the module. The **Template Creator** displays.

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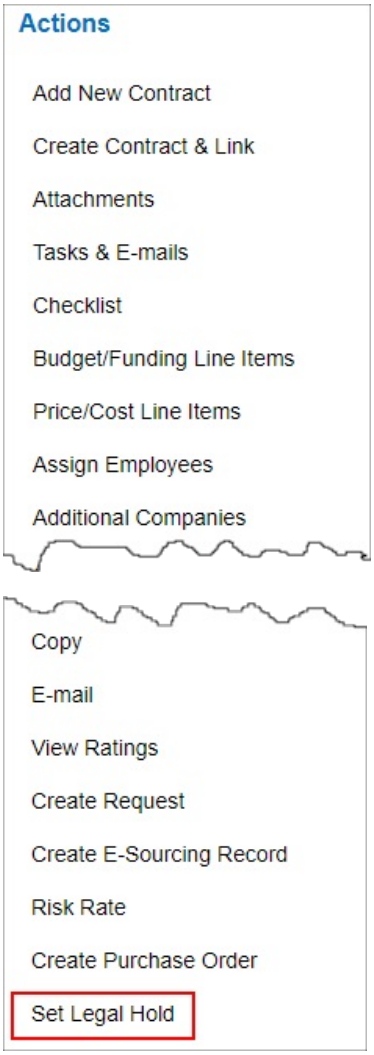
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Legal Hold

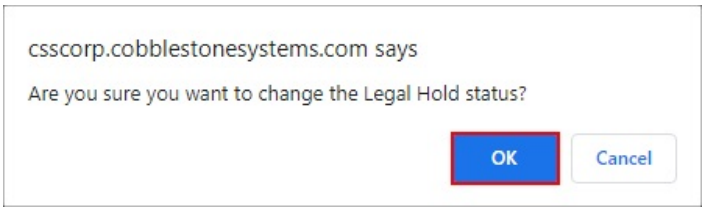
Legal Hold

Contract Details: Legal Hold

A System Admin User or any User with the **Setup: Manage Legal Holds** Permission assigned can manage a Contract Record's **Legal Hold** Status. To put a Contract Record on Legal Hold, click **Set Legal Hold** on the side menu, then confirm via the pop-up.

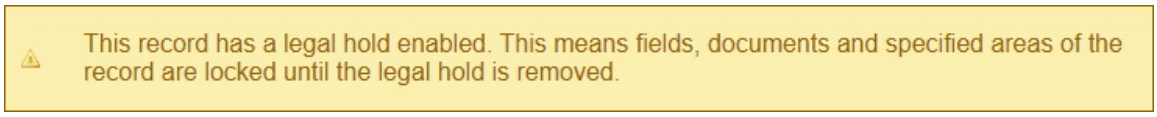


The user will see a prompt asking if they are sure they want to change the Legal Hold status. Click **OK**.

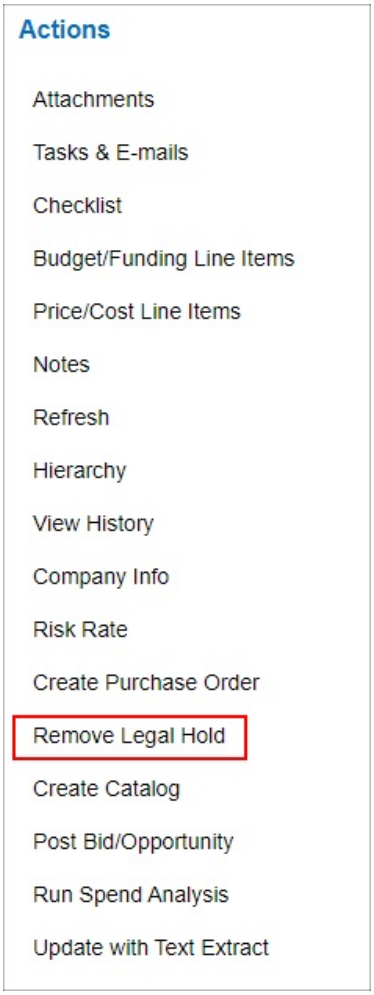


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A banner, as seen below, appears along the top of the Contract Record. Fields are locked from editing and Attachments can no longer be added or deleted.



To remove the Legal Hold, click **Remove Legal Hold** on the side menu, then confirm via the pop-up.



The user will again see a pop-up asking if they are sure they want to change the Legal Hold status. Click **OK**.

To be able to attach new files while a record is on Legal Hold, there is a configuration setting for that. Navigate to:

Manage/Setup > Application Configuration > Config Settings

Make sure **Security** is selected for the **Select Configuration Group** drop down. Go to **Group: Legal Hold** and adjust the **Disable File Uploads with Legal Hold** setting.

There is also a configuration setting regarding Document Authoring and Document Collaboration processes while on Legal Hold. (Document Collaboration being only relevant if using the Document Collaboration Add-On Module)

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Select **Security** for **Select Configuration Group**. Modify **Document Collaboration with Legal Hold** as necessary.

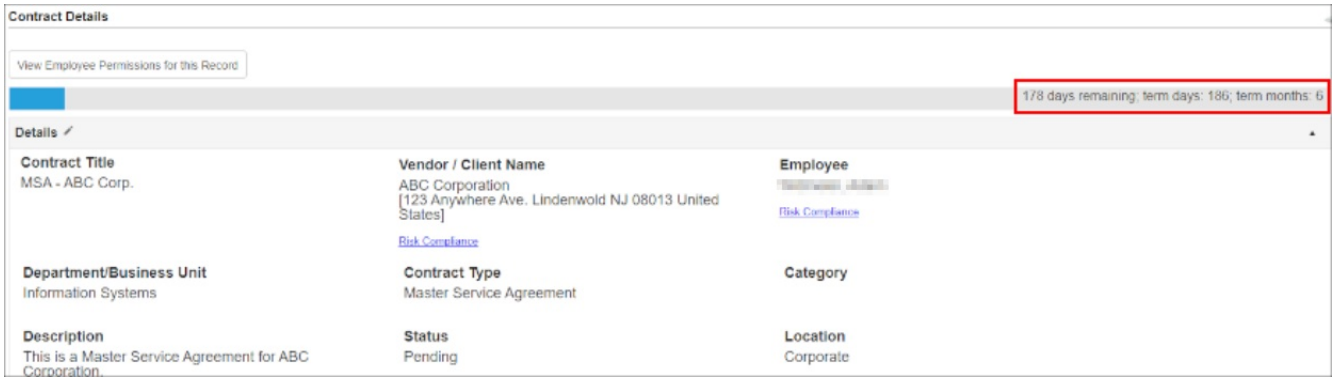
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Progress Bar

Progress Bar

Contract Details: Progress Bar

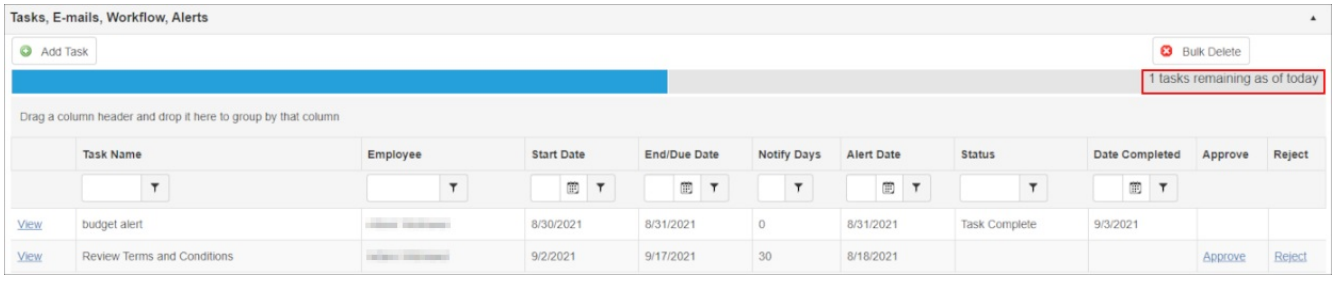
The Progress Bar on a Contract Record illustrates how far along in the Contract Life Cycle that Contract Record is. If it is after the Effective Date, the bar will fill up until it reaches the Expiration Date and remains filled after the Expiration Date. For example:





The example Contract Record above was made Effective on 8/26/2021 and was set to expire on 2/28/2022. Based on the date the image was taken, the **Progress Bar** is barely filled up, and the text on its right side gives us further detail. We see that there are 178 days remaining, it will have been effective for 186 days total, about 6 months. On 2/28/2022, the **Progress Bar** will be entirely filled.

There is also a **Progress Bar** for Contract Tasks which fills up as Tasks are Completed.



One out of two Tasks above has been Completed, so the **Progress Bar** is filled 1/2 of the way. The text on its right side also confirms for us that one Task remains open.

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Send Secure E-mail

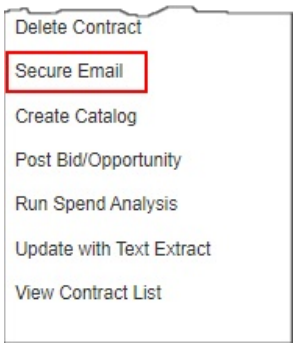
Send Secure Email

Secure Email

Secure Email can be sent from contract, request, counterparty, and solicitation records. Secure email allows active users of the system to send emails from the system with a link to direct the recipient to the secure email chain.

Creating a New Secure Email

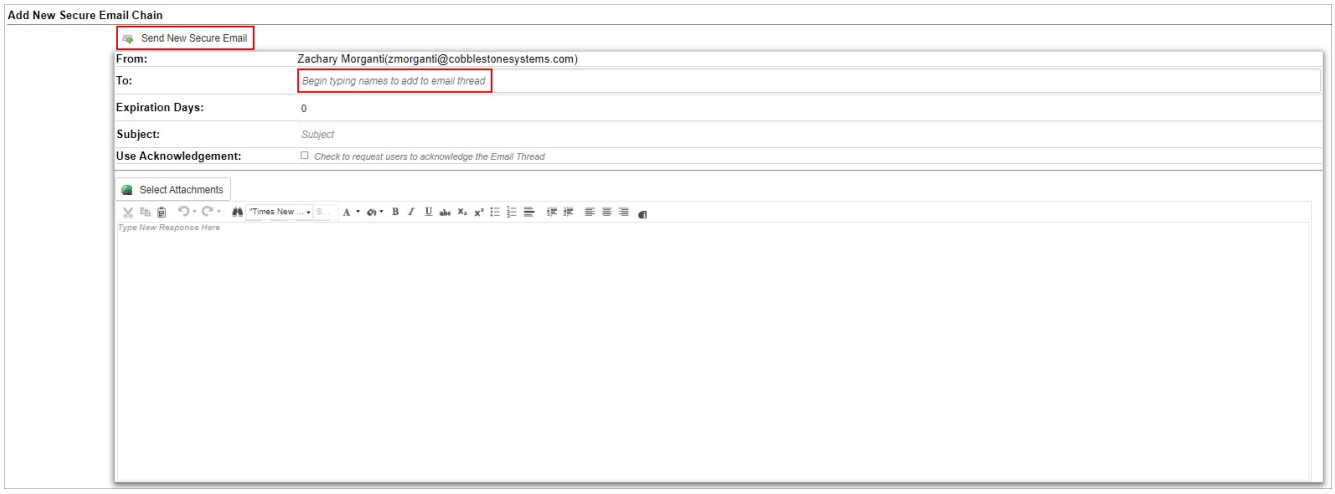
1. While on the record's details screen, on the side menu, click **Secure Email** from the side menu.



2. The **Secure Email Chain List** displays. Click **Add New Secure Email** from the side menu.



3. The **Add New Secure Email Chain** screen displays.



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4. Complete all fields before sending the secure email:

- **From:** This field is pre-populated with the email address of the logged-in user.
- **To:** As you type a name, names appear from the employee list and counterparty contact list. To remove a name, click the **X** next to the name.
- **Expiration Days**: Enter the number of days the link is active for responses. Enter 0 (zero) to keep the link active.
- **Subject:** Enter a subject line
- **Use Acknowledgement:** Check the box if you want each participant to acknowledge they have viewed the email thread.
- **Email Body:** You must enter content in the Email body.

5. To add attachments to the email, click **Select Attachments**. The **Attachments** window displays.

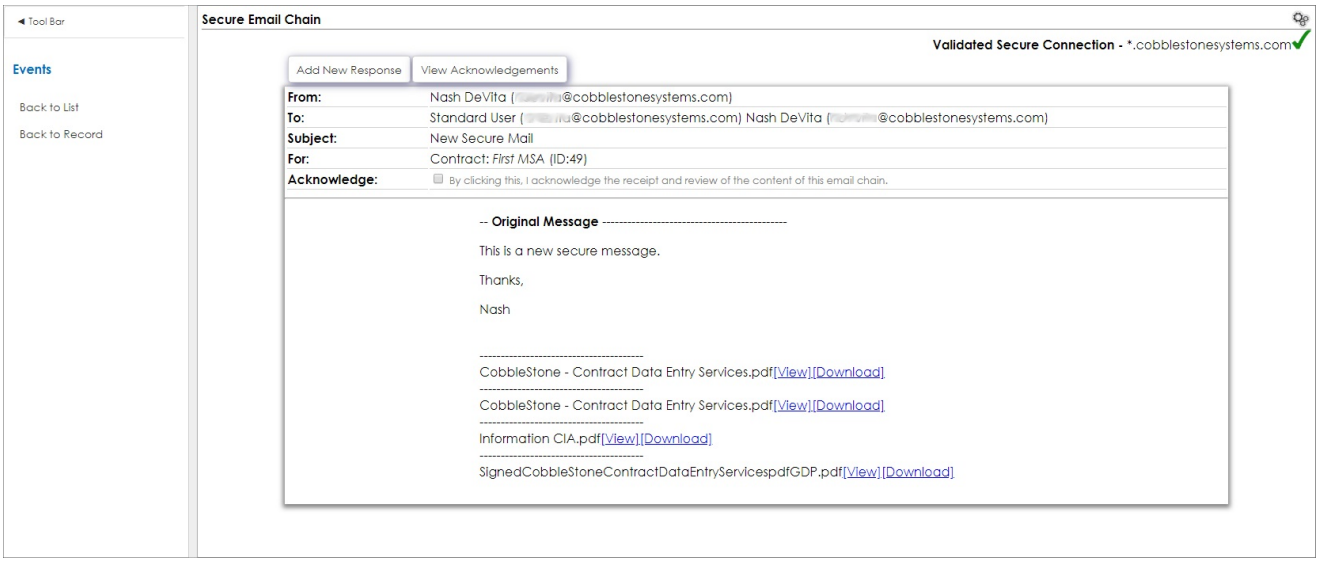


6. All files attached to the record display. Mark the box next to each attachment to include it in the email.

7. Click **Save and Close** to save the selection.

Note: If there are no files attached to the record, the following message displays: There are no attachments available for this record. Click **Save and Close** to return to the email editor.

8. Once the email is completed, click **Send New Secure Email** to send the email. A new screen displays validating the email has been sent.

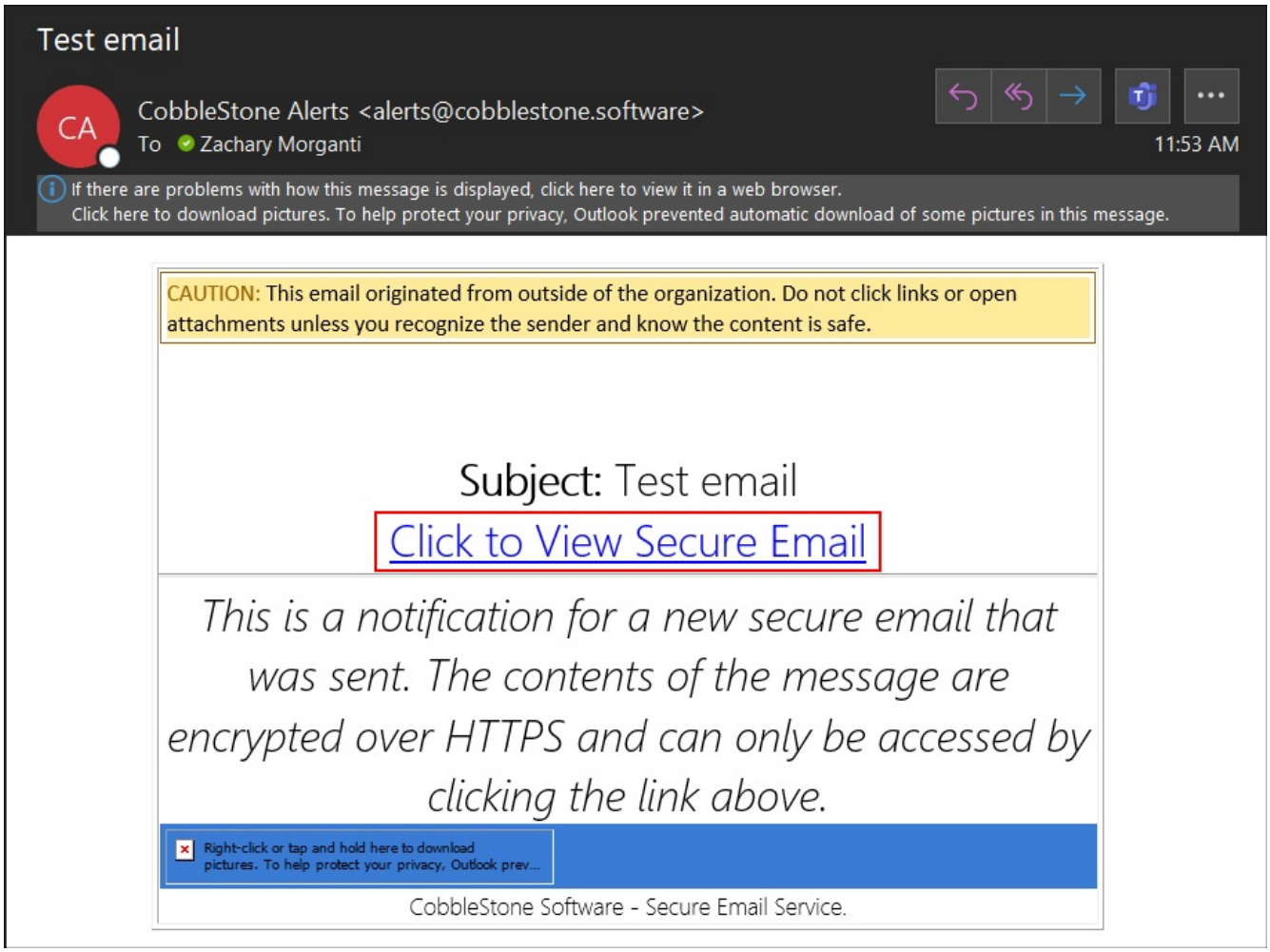


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The recipient(s) receive an email with a link to access the secure email. The user must be logged in to the system to review the email.

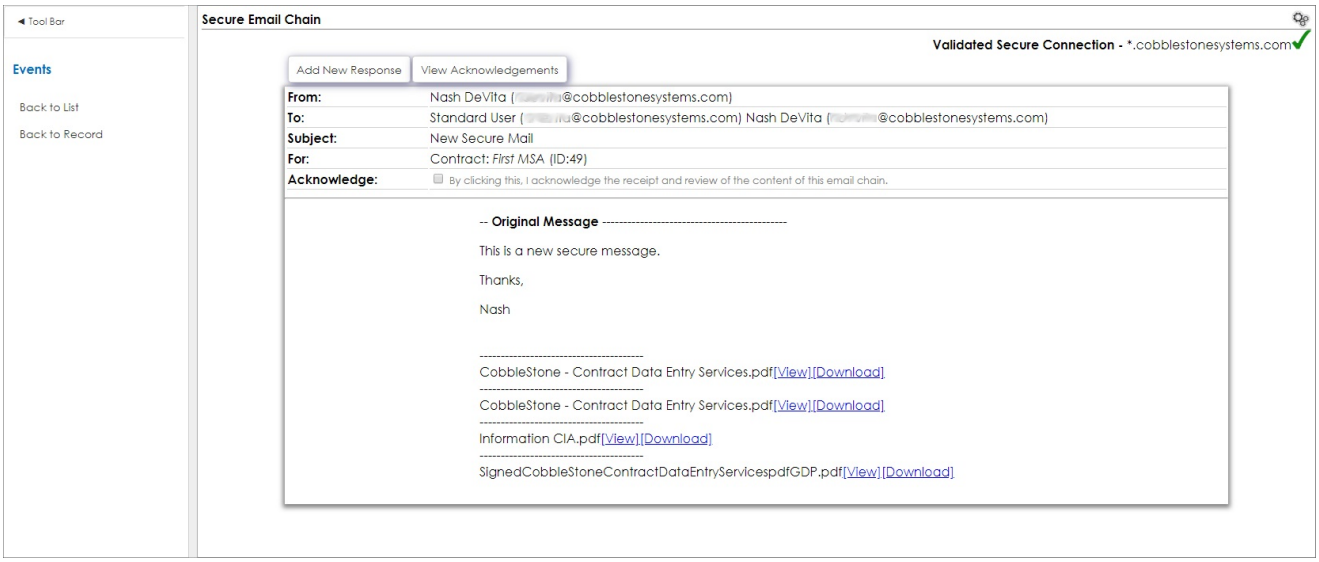
Replying to a Secure Email

1. When a secure email is received, click **Click to View Secure Email** in the email.



2. If not actively logged into the system, the link takes the user to the **Log In** screen (unless your organization uses Single Sign-On). Once signed-in, the system goes to the secure email chain sent in the email link.

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3. Click **Add New Response** to draft a response. The email editor screen displays.

4. The email is pre-populated with data from the first email. To acknowledge receipt of the email, mark the box next to **Acknowledge**. This box does not appear if the original recipient does not require acknowledgement.

5. Attachments can be added to the email by clicking **Send Attachments**.

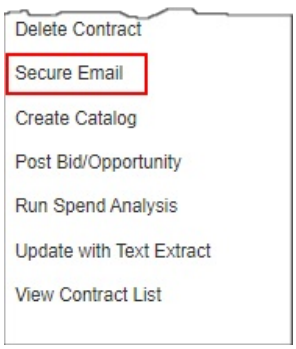
6. To respond to the email, complete the email body and click **Send Response**.

Note: Changes can be made to any attachments and uploaded on the file by clicking **Return to Record** and using the **Browse** or **Drop Files Here** options to upload new file versions.



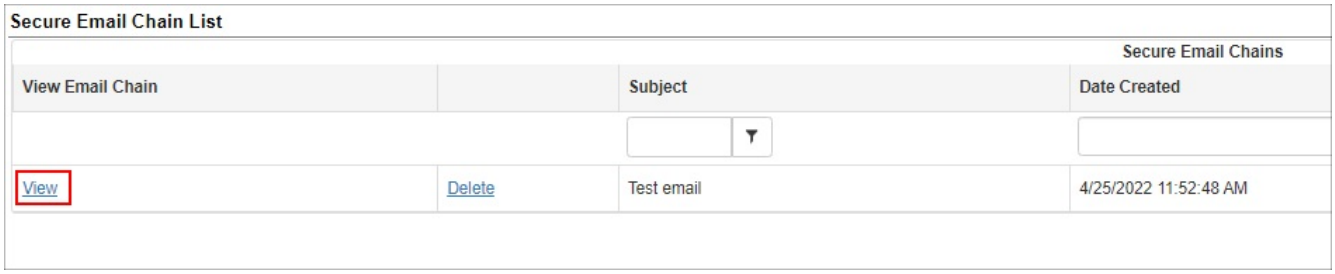
Viewing a Secure Email Chain

1. From the record's details screen, click **Secure Email**.

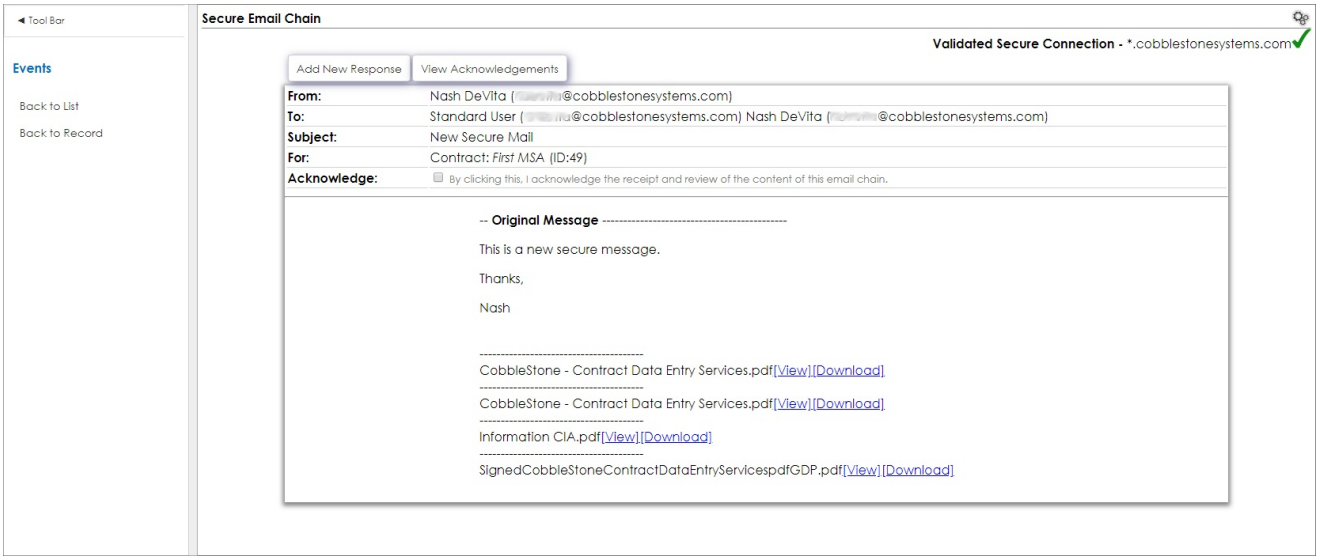


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2. The **Secure Email Chain List** displays.



3. Click **View** for the line item. The Email chain displays.



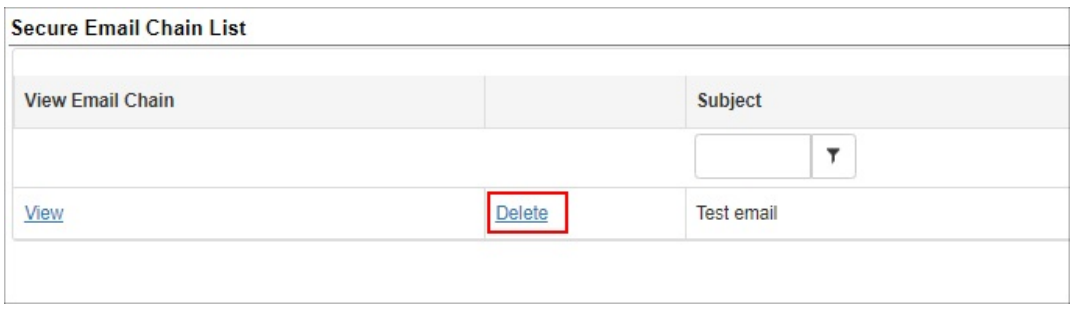
4. To respond to the email, click **Add New Response**.

5. To view acknowledgements, click **View Acknowledgements**.

Deleting a Secure Email

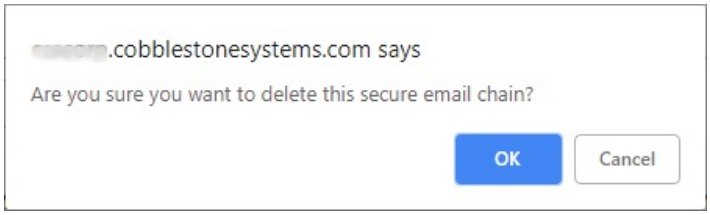
1. From the record's details screen, Click **Secure Email**.

2. The **Secure Email Chain List** displays.



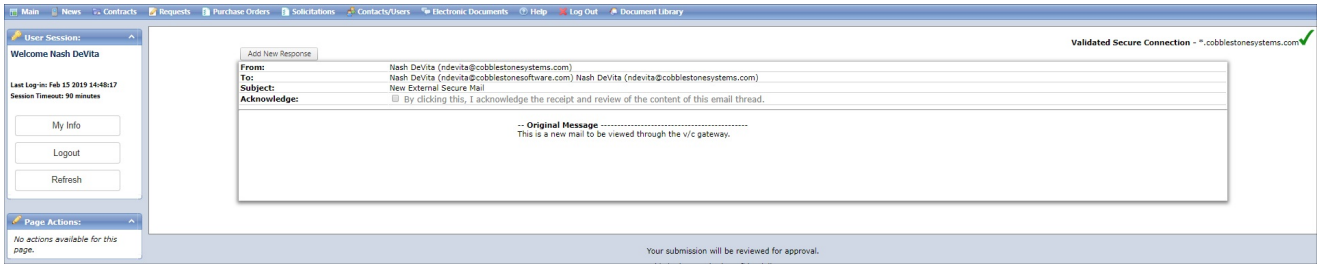
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Click **Delete** for the line item for email chain to be removed. A pop-up window asking you to verify you want to delete the record displays. Click **Cancel** to abort the removal. To continue deleting the record, click **OK**.



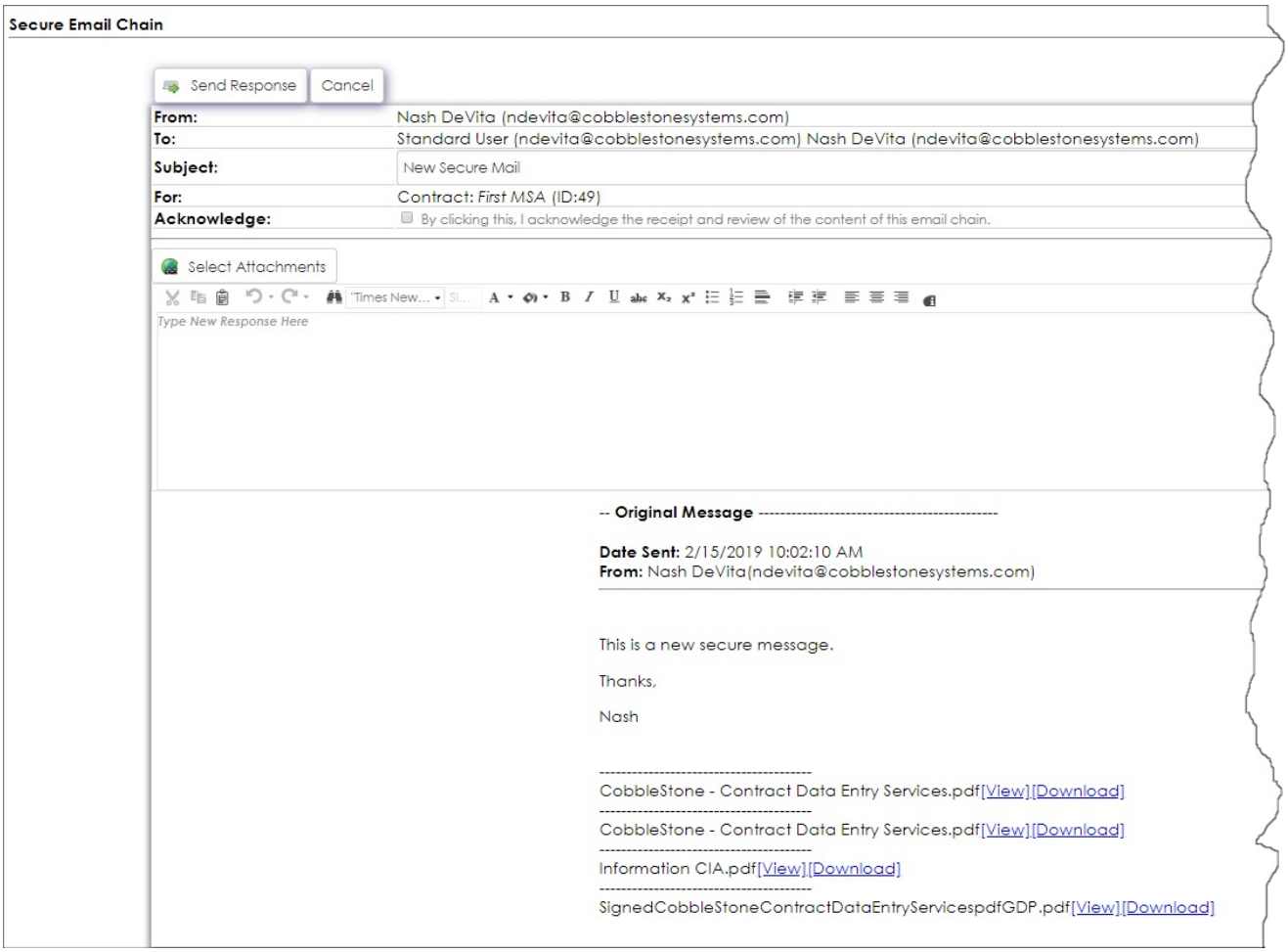
Viewing and Responding to a Secure Email Via the Vendor/Client Gateway

A counterparty contact can view their secure email on the **Vendor/Client Gateway**.



1. Click **Add New Response** to a draft a response.

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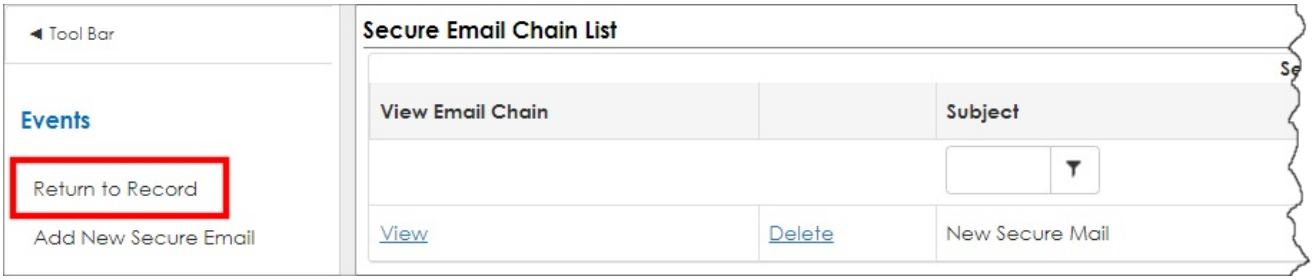


2. The email is pre-populated with data from the first email. To acknowledge receipt of the email, mark the box next to **Acknowledge**.

3. Attachments can be added to the email by clicking **Send Attachments**.

4. To respond to the email, complete the email body and click **Send Response**.

Note: If there are no files attached to the record, the following message displays: There are no attachments available for this record. Click **Save and Close** to return to the email editor.



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Spend Analytics

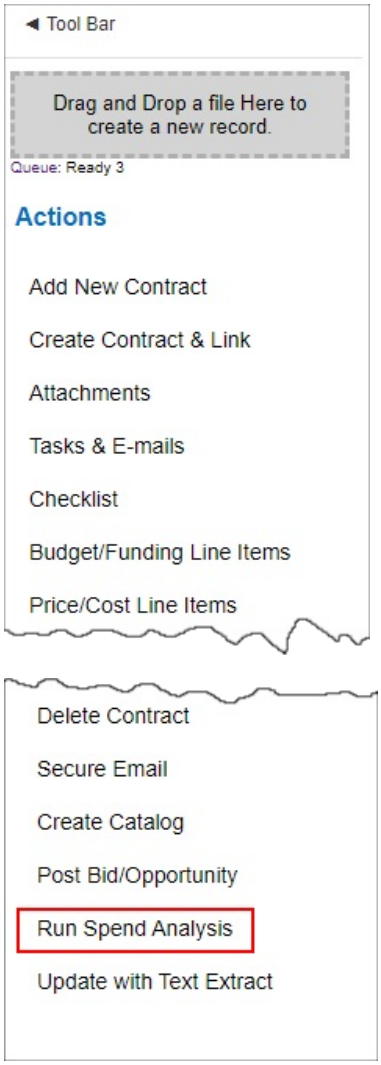
Spend Analytics

Spend Analytics

System administrators have access to a side menu item for Spend Analytics. When run, comparisons across contracts display.

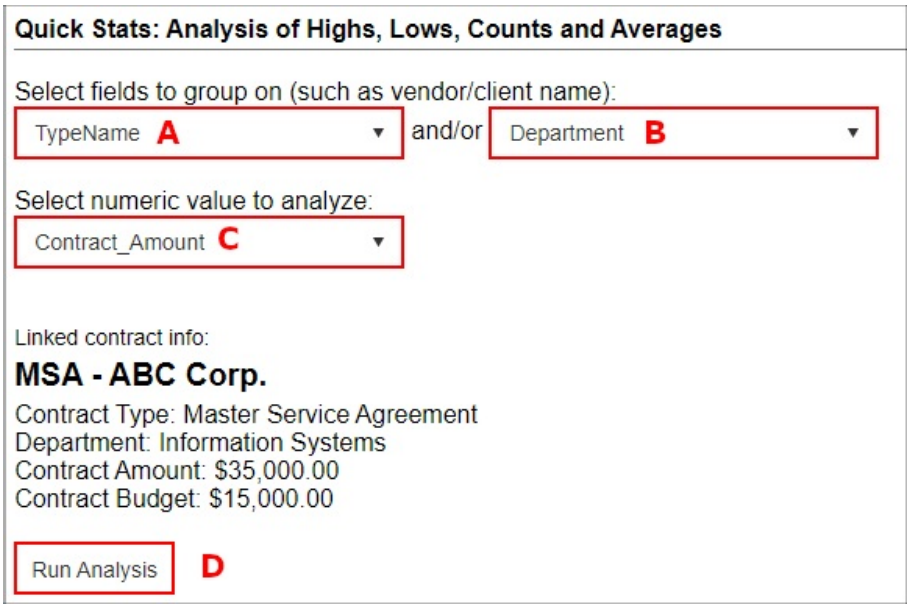
Running an analysis

1. While on the record's details screen, on the side menu, click **Spend Analytics** from the side menu.

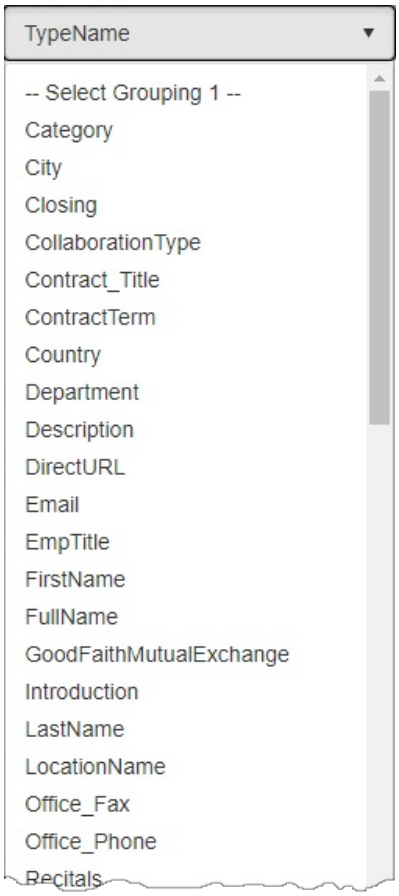


2. The **Quick Stats: Analysis of Highs, Lows, Counts, and Averages** displays. This page contains a number of options for which data is to be specified and to run the analysis.

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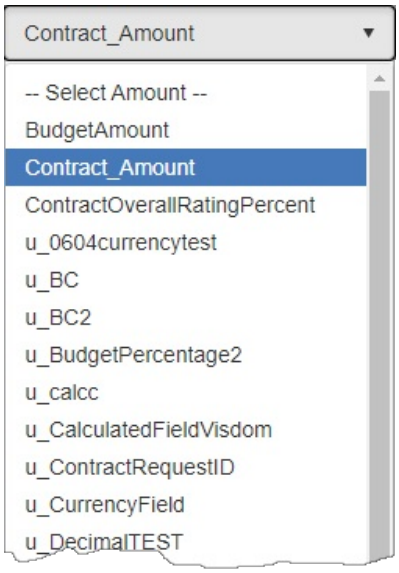


A. Select the primary field against which to group the data



B. Optionally, select the second field against which to group the data.

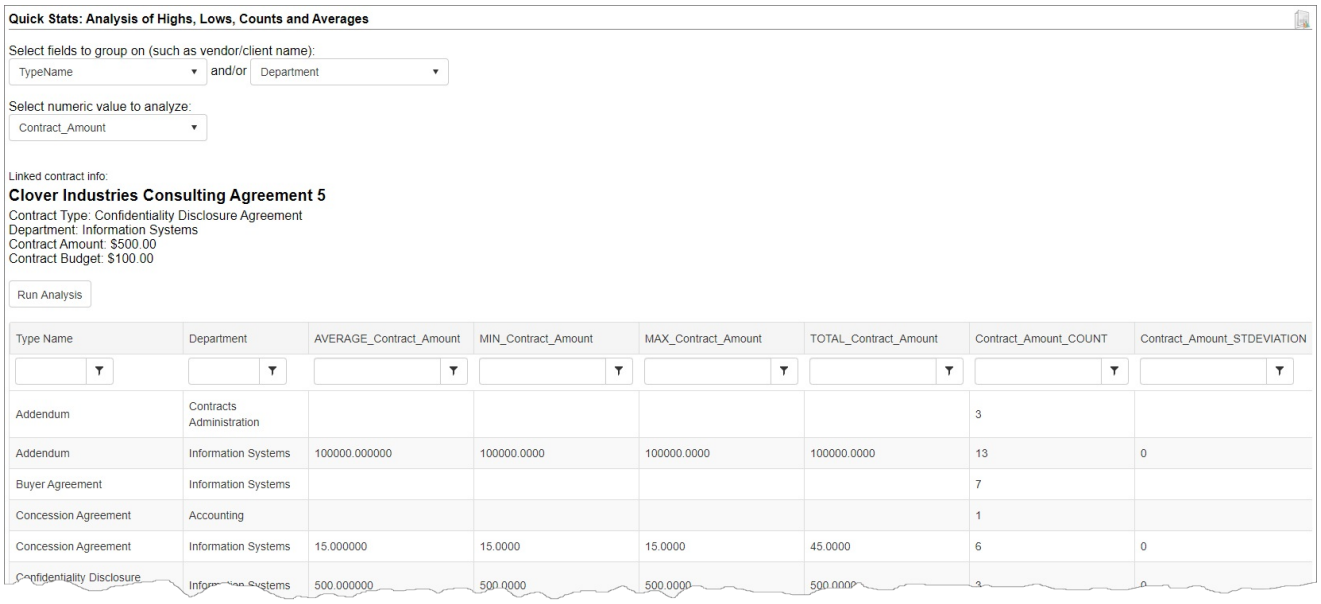
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C. Finally, select the numeric field against which to run the analysis.

D. Click **Run Analysis**.

3. The results display below the the options. The results below are only for illustrative purposes.



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Update a Record with VISDOM

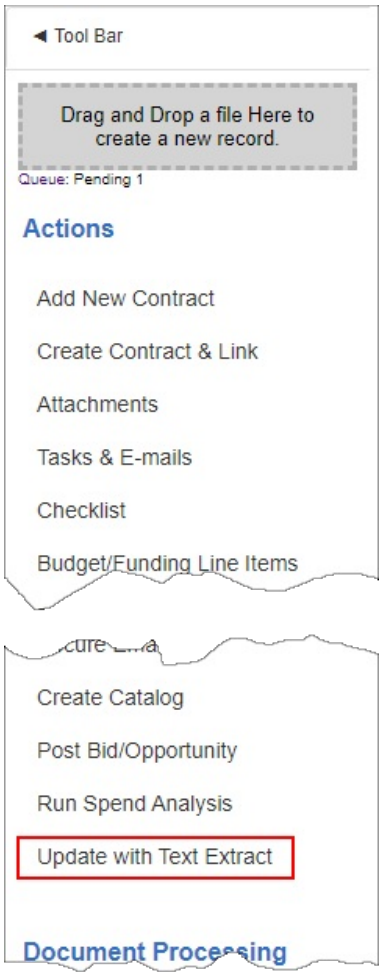
Update a Record with VISDOM

Update Record with VISDOM Text Extraction

To provide maximum convenience, Cobblestone allows users to update records with VISDOM text extraction, contrasted to the user having to do it manually.

To update a record with VISDOM Text Extraction:

1. Navigate to the desired record



2. If not already attached, upload the applicable attachment

3. Select **Process**

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4. Select **File**



Note: File desired must be OCR'ed prior to being available for processing

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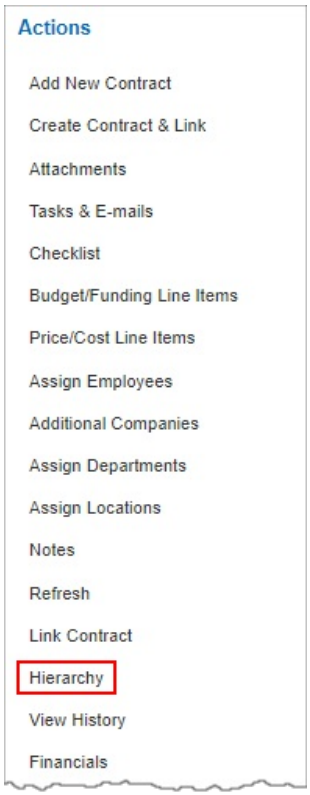
Contract Hierarchy

Contract Hierarchy

Contract Hierarchies may be created in Contract Insight which allows permissioned users to keep track of related parent/child records inside of the system.

Adding a Contract Hierarchy

To add a Contract Hierarchy, navigate to a parent/child record's *Contract Details* screen. Under the *Actions* side menu, click **Hierarchy**.



This brings the user to the Hierarchy sub-table which reveals the existing hierarchies if any presently exist. Click **Add** to begin creating a new Contract Hierarchy.



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A prompt will appear asking the user if they would like to add this current record as the **Parent Record** or the **Child Record**. Click the applicable option.



A dropdown will appear which will take the user through the appropriate steps to link the records together. Select an option from the dropdown.

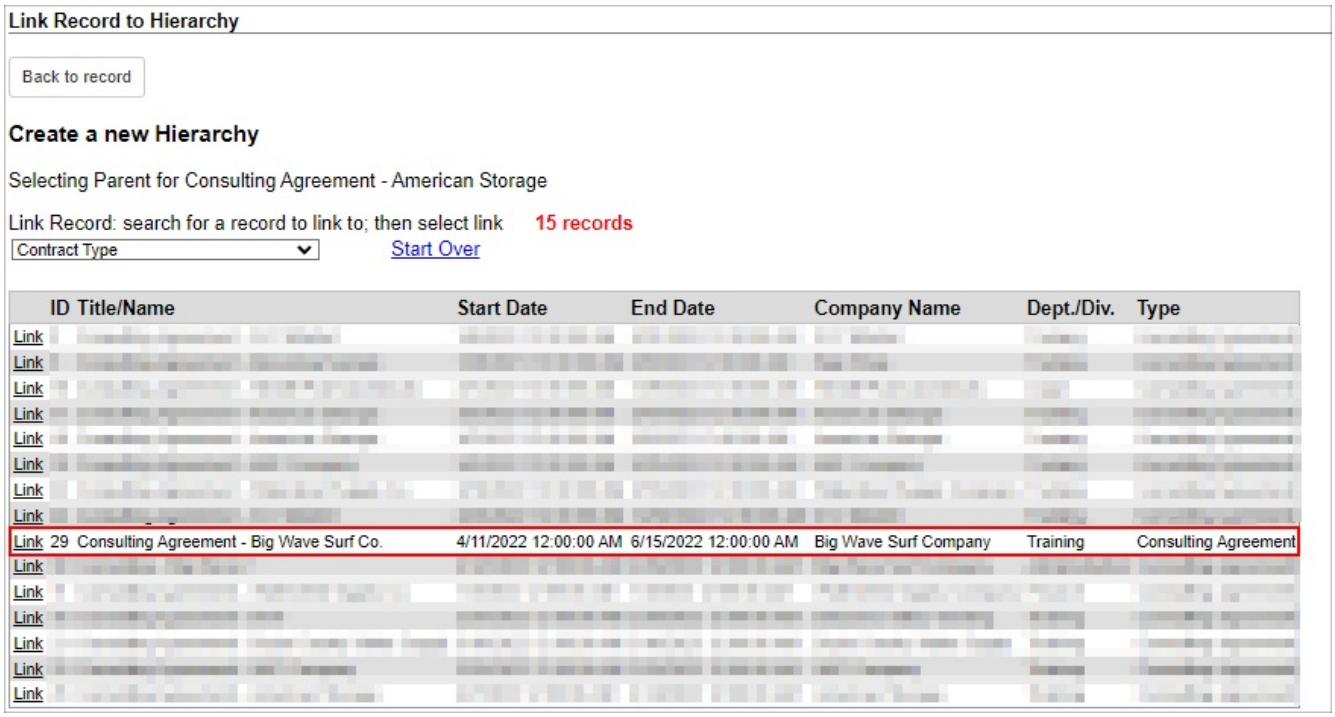


A new dropdown appears. Select an option from this dropdown as well then click **Search**.

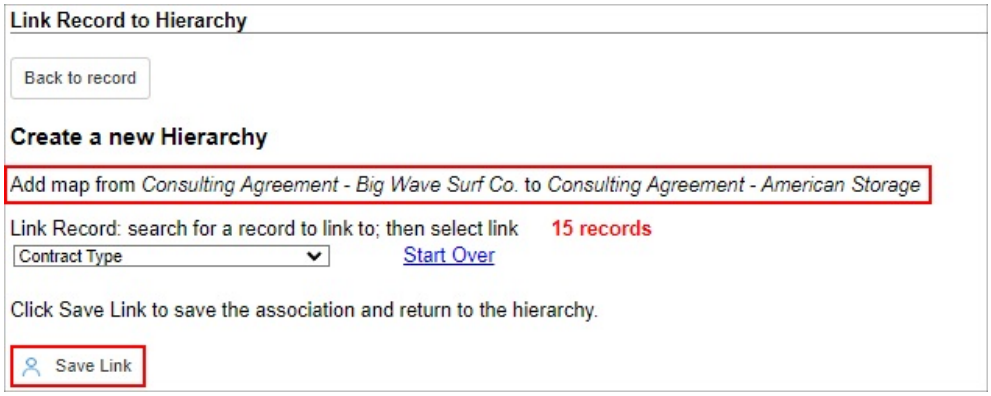


This next screen populates the records that fit the user's search following the prior dropdowns. Click **Link** next to the necessary parent/child record.

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Click **Save Link** to apply the parent/child record to the new Contract Hierarchy.



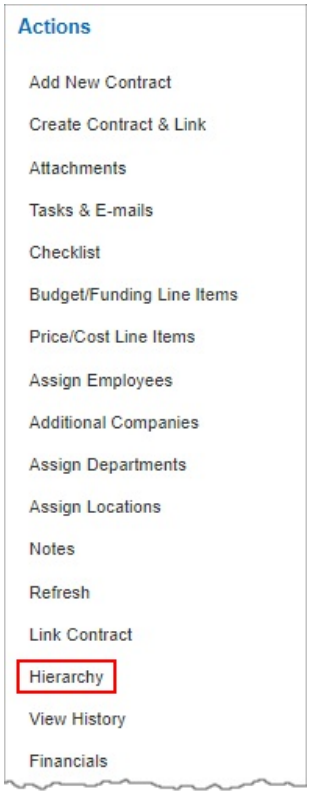
A screen similar to the following appears:

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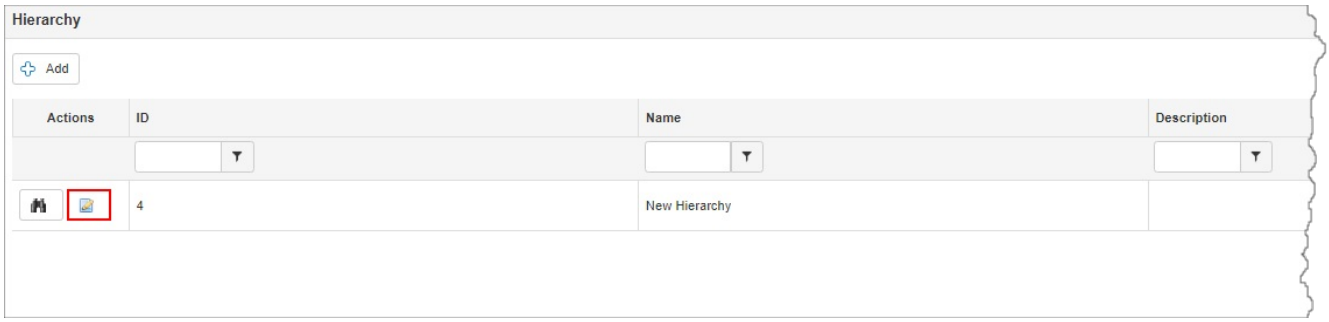
Editing a Contract Hierarchy

Navigate to the *Contract Details* screen of the hierarchy that requires editing. Under the *Actions* side menu, click **Hierarchy**.

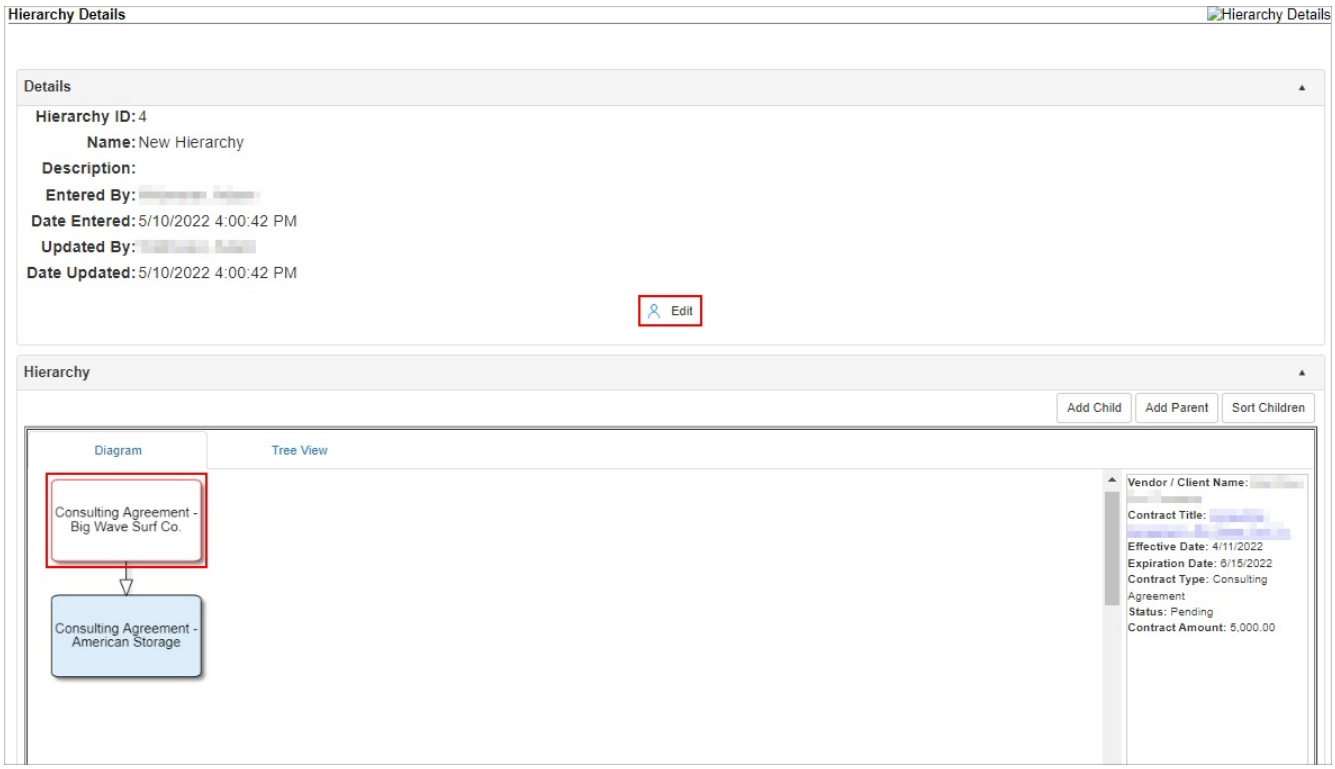


Click the **Pencil and Paper Icon** to begin editing the hierarchy.

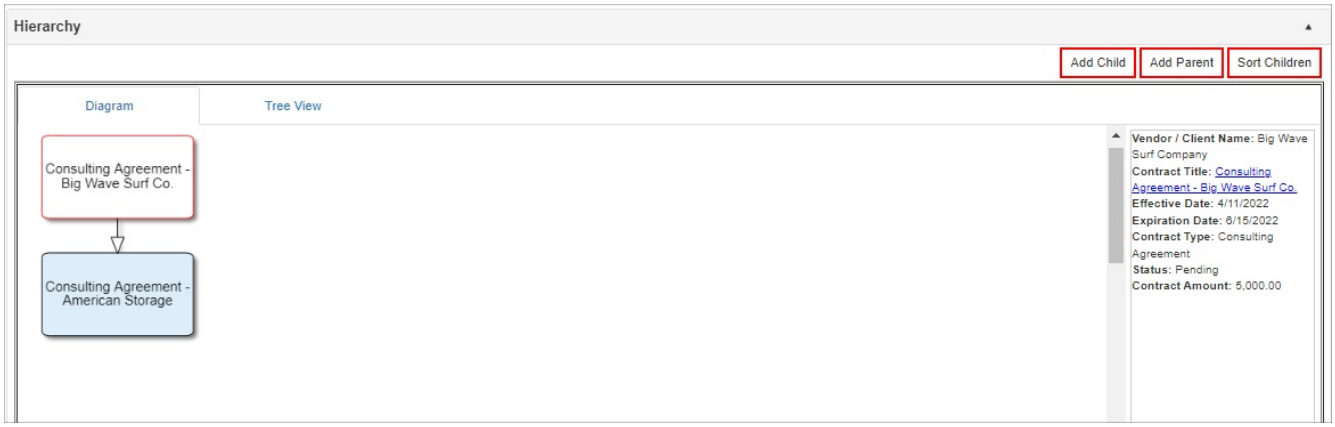
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To edit the name or add a description, click edit. Otherwise, users may click on a tile in the diagram to edit that portion of the hierarchy. When a tile is clicked, it will be highlighted in red (pictured below).



On the right-hand side, after clicking on a tile, three options appear. Users may **Add Child** to this record in the hierarchy, **Add Parent** to this record in the hierarchy, or **Sort Children** in this hierarchy.



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When adding a new child or parent record to the hierarchy, the user will follow the same steps as when adding a new record to the hierarchy in the beginning portion of this page.

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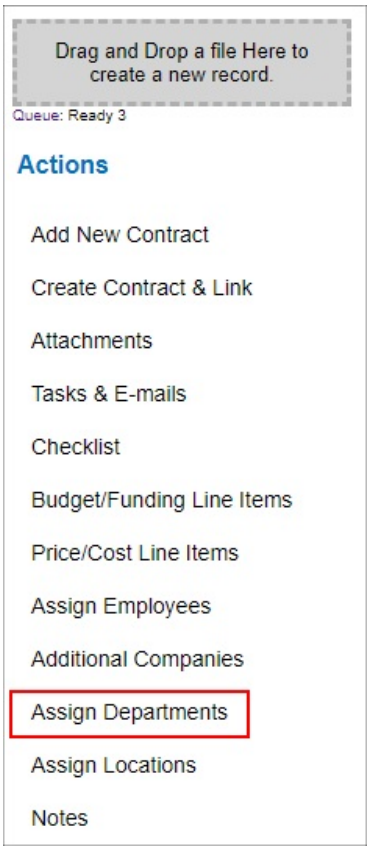
Assign Additional Departments to a Contract

Assign Additional Departments to a Contract

Contracts: Additionally Assigned: Assign Additional Department(s)

Contract Insight provides the ability to assign more than one department to a record.

1. Click **Assign Departments** on the side menu of the **Contract Details** screen.

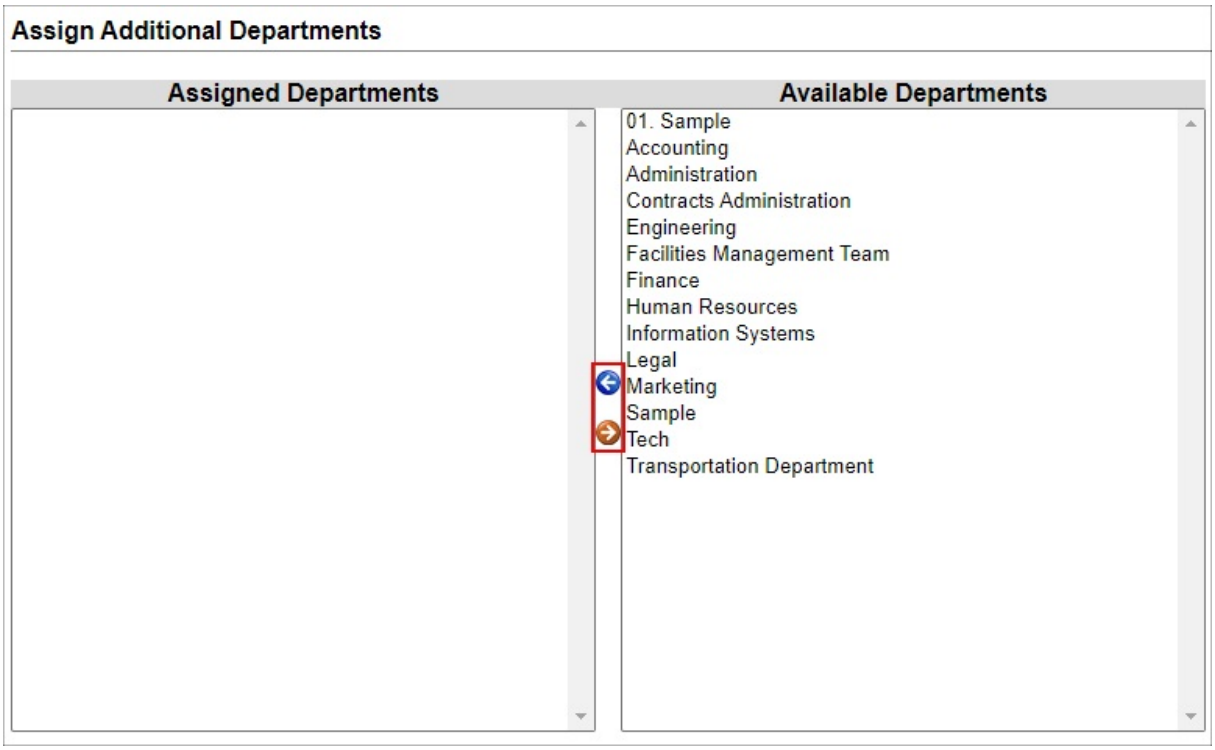


2. The **Assign Departments** screen displays.

3. To assign a department to the contract, select/highlight the department name in the **Available Departments** box and click the **Blue Left Arrow** to add the department name to the **Assigned Departments** box.

4. To remove a department from the contract, select/highlight the department name in the **Assigned Departments** box and click the **Red Right Arrow** to remove the department name from the **Assigned Departments** box.

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5. When finished, click **Return to Contract Details** on the side menu of the **Assign Departments** screen to return to the **Contract Details** screen.

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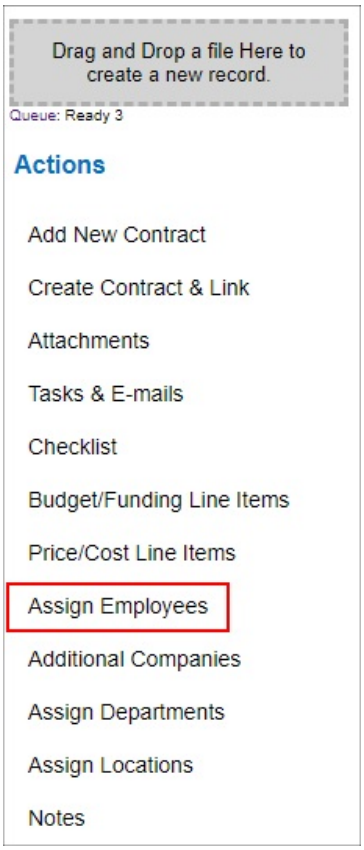
Assign Additional Employees to a Contract

Assign Additional Employees to a Contract

Contracts: Additionally Assigned: Assigning/Removing Additional Employees

Contract Insight allows its users to assign and remove employees from contracts.

1. Click **Assign Employees** button on the side menu of the **Contract Details** screen.

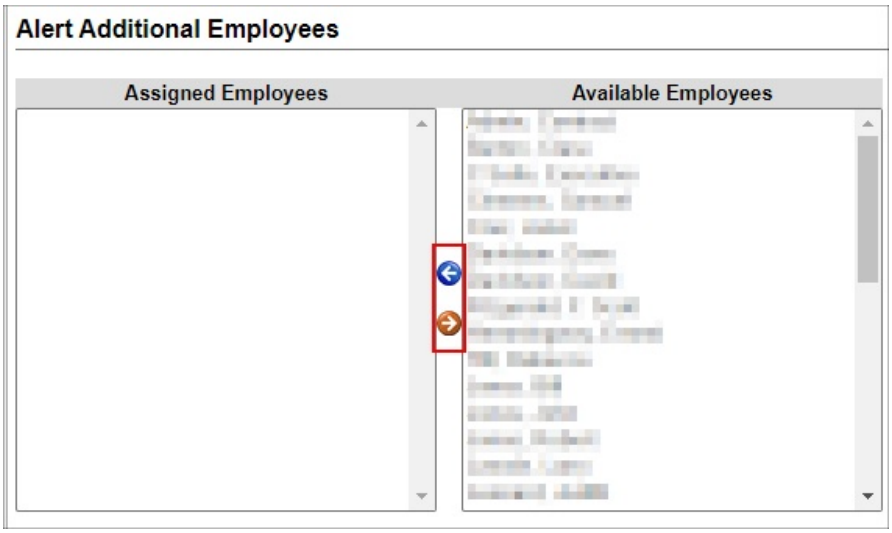


2. The **Alert Additional Employees** screen displays. By assigning an employee, alerts will be sent to them for contract activities.

3. To assign an employee, click/highlight the employee name in the **Available Employees** box and click the **Blue Left Arrow**. This will add the employee's name to the **Assigned Employees** box.

4. To remove an employee, click/highlight the employee name in the **Assigned Employees** box and click the **Red Right Arrow**. This will remove the employee's name from the **Assigned Employees** box.

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5. When finished assigning/removing employees, click **Return to Contract Details** on the side menu of the **Alert Additional Employees** screen to return to the **Contract Details** screen.

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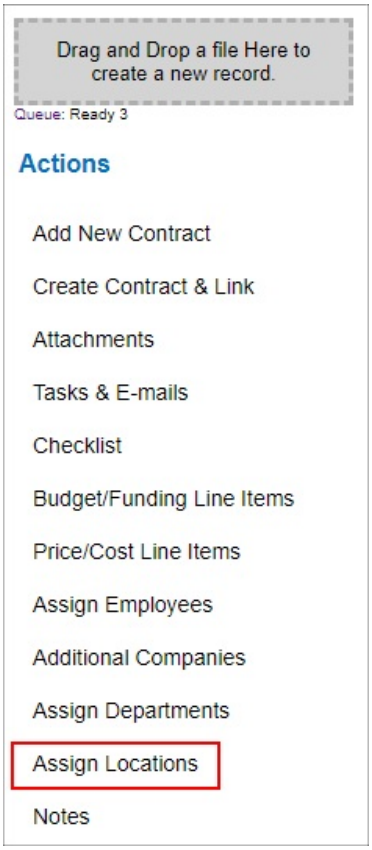
Assign Additional Locations to a Contract

Assign Additional Locations to a Contract

Contracts: Additionally Assigned: Assign Additional Location(s)

CobbleStone allows users to add locations to contracts through the **Contract Details** screen.

1. Select **Assign Locations** from the side menu on the **Contract Details** screen.

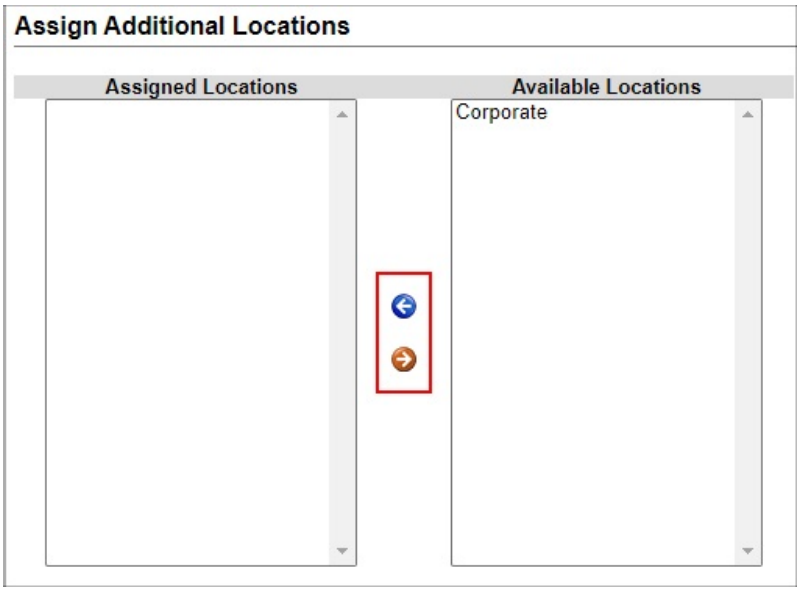


2. The **Assign Additional Locations** screen displays.

3. To assign a location to a contract, select/highlight the location name in the **Available Locations** box and click the **Blue Left Arrow** to add the location name to the **Assigned Locations** box.

4. To remove a location to a contract, select/highlight the location name in the **Assigned Locations** box and click the **Red Right Arrow** to remove the location name from the **Assigned Locations** box.

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5. When finished, click **Return to Contract Details** on the side menu of the **Assign Additional Locations** screen to return to the **Contract Details** screen.

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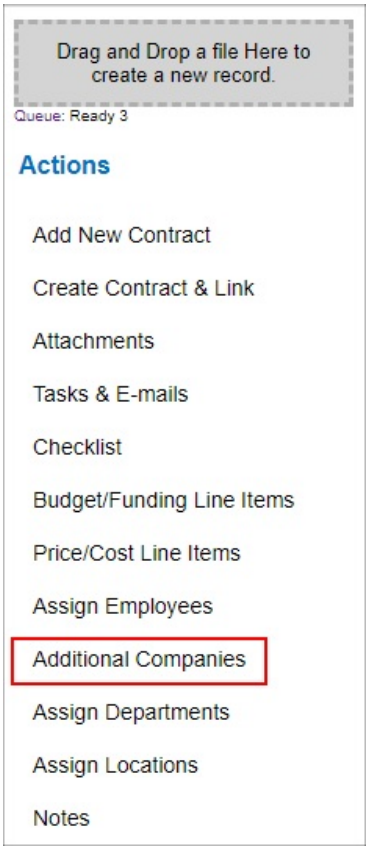
Assign Additional Vendors/Companies to a Contract

Assign Additional Vendors/Companies to a Contract

Contracts: Additionally Assigned: Adding/Assigning Additional Companies

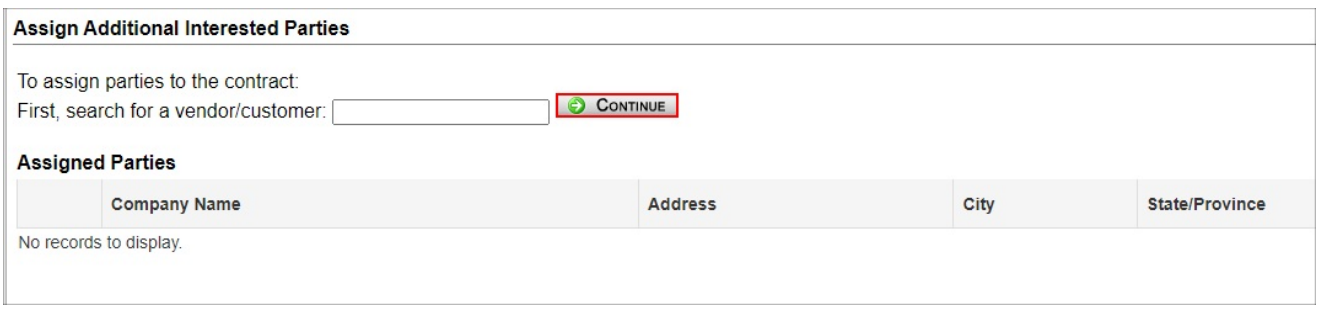
CobbleStone enables users to add additional companies to contracts.

1. Click **Additional Companies** on the side menu of the **Contract Details** screen.



2. The **Assign Additional Interested Parties** screen displays.

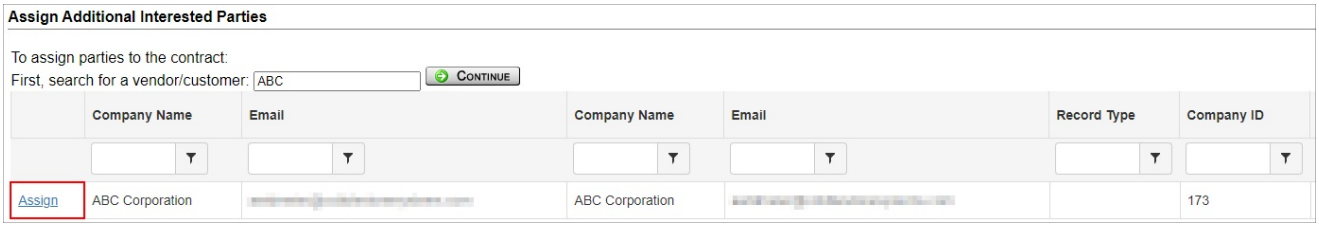
3. First, enter a keyword or keywords into the text box to the left of **Continue** to search for the Company to additionally assign to this Contract Record.



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4. Once you enter the name of the Company for which you are searching, click **Continue** to search for the Company. Any Companies that meet the keyword search criteria will be displayed.

5. Click **Assign** for the Company you would like to add to this Contract Record.



6. Click **Return to Contract Details** on the side menu of the **Assign Additional Interested Parties** screen to return to the **Contract Details** screen.

Note: Users with the proper permissions may add a company to the Contract Insight system from this screen as well. Click **Add Company** on the side menu of the **Assign Additional Interested Parties** screen. See the "Add a Company" page of the Wiki for an overview of how to add a company/vendor.

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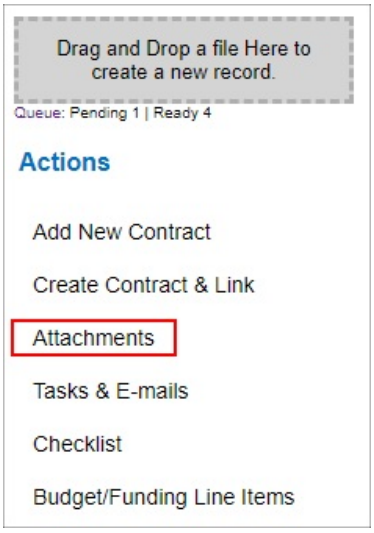
Adding a Contract Attachment

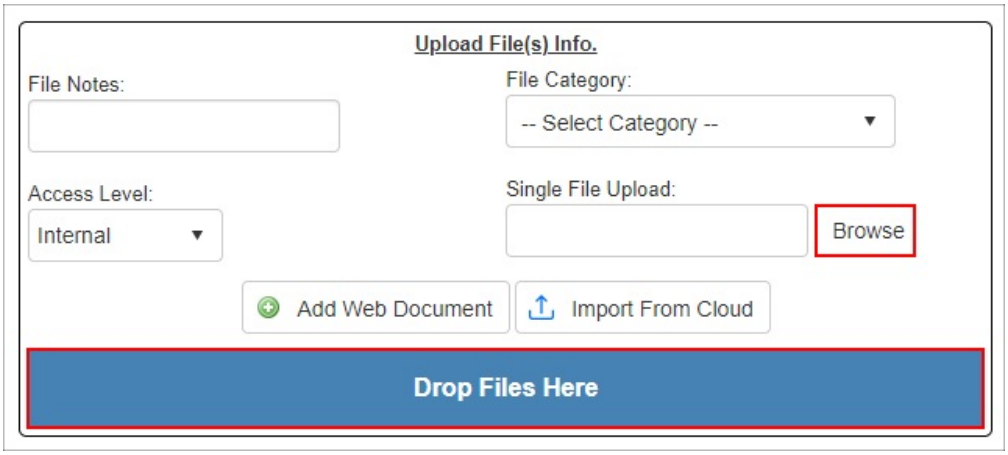
Adding a Contract Attachment

Adding a Contract Attachment

CobbleStone provides users with the ability to attach files, documents, and images to contract records.

Access the attachments section of the **Contract Details** screen by clicking **Attachments** on the side menu of the **Contract Details** screen or by scrolling to the section.





Attach a File:

1. Click **Browse** under the **Files/Attachments** section of the **Contract Details** page.

2. Search for and select the file to attach.

3. Click **Open** to upload the file into the text box to the left of the **Browse** button.

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4. Add a description to the attachment in the **File Notes** text box (optional).

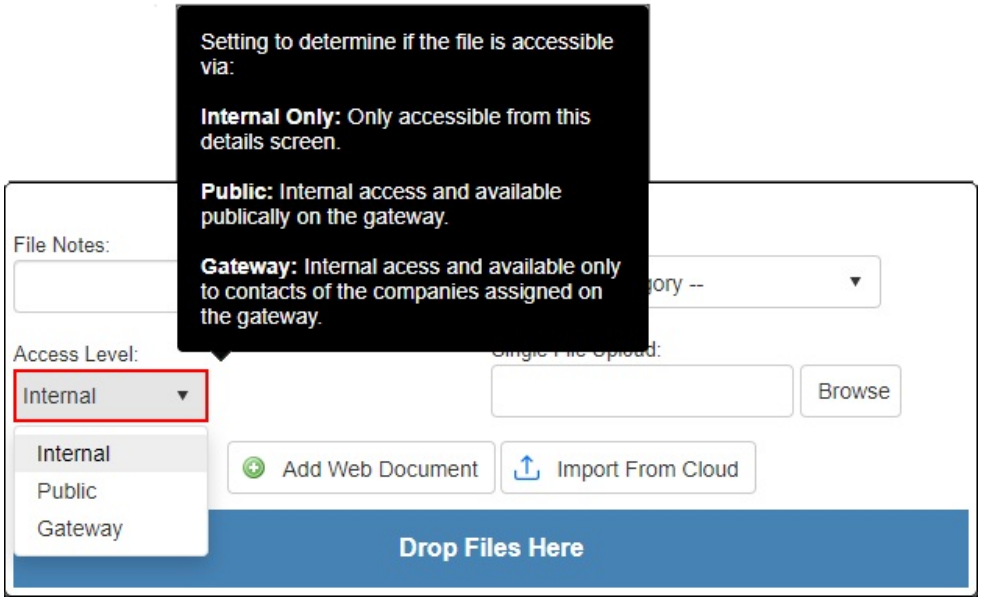
5. Select the **Access Level** to which the files will be (definitions listed below). For the **Access Level** drop down, the additional options apply only to organizations that have purchased the optional add-on module(s) for the **Public Access Portal** and/or the **Vendor/Client Gateway**.

OR

1. Select the **Access Level** to which the files will be (definitions listed below). For the **Access Level** drop down, the additional options apply only to organizations that have purchased the optional add-on module(s) for the **Public Access Portal** and/or the **Vendor/Client Gateway**.

2. Add a description to the attachment in the **File Notes** text box (optional).

3. Drag and drop multiple files onto the blue **Drop Files Here** icon.



Attach a File:

1. Click **Browse** under the **Files/Attachments** section of the **Contract Details** page.

2. Search for and select the file to attach.

3. Click **Open** to upload the file into the text box to the left of the **Browse** button.

4. Add a description to the attachment in the **Notes** text box (optional).

5. For the **Access Level** drop down, the additional options apply only to organizations that have purchased the optional add-on module(s) for the **Public Access Portal** and/or the **Vendor/Client Gateway**.

Note: If **Public** or **Gateway** is selected and your organization has not purchased the above mentioned modules, it will not have any effect on the attachment, the viewing of the attachment by unauthorized users of the system, or the viewing of the attachment by outside parties.

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Click **Save**. The file is added to the **Attached Files, Documents, Images** portion of the **Files/Attachments** section of the **Contract Details** screen.

Alternatively, drag the file over the **blue area** in the **Files/Attachments** section and drop it. The file is uploaded and attached to the record. Set any **Access Level**, **Categories**, and **File Notes** before dragging the file onto the record. Multiple files can be dropped at the same time.

Note: After attaching and saving an attachment, do not click your browser's refresh button. Doing so will repeat the last action of attaching the file without warning or notification.

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Attachment Check-In/Check-Out

Attachment Check-In/Check-Out

Contract Attachments: Check In/Check Out

Overview

Checking out contract related files before working on them helps to avoid conflicts and confusion when multiple people are working on the same set of files. When a file is checked out to a user, only authorized users (typically the user that checked-out the file) may download the checked-out file to help prevent others from editing the file. An authorized user can check-out any file on a Contract Record for which the user has permission.

When an authorized user checks-in a contract file, the user can type comments about the changes that were made to the newly added file in the file notes box. This helps users to understand what has changed in the newly added contract file from version to version. This is especially helpful if several people work on a file or if the file is likely to go through several revisions. Your document comments become a part of the version history of the file along with the date and time and user that added the new file, which can be helpful if people need to view or download a previous version.

An organization may require authorized users to check-out a file before it is edited. When an authorized user attempts to view or download a file, they are prompted if the user would like to check-out the file (if it has not been checked-out by another user). If the file is checked-out (by another user) the system will require the previous versions of the checked-out file be checked-in prior to uploading a new document.

While a file is checked-out to a user, the changes that are made to the file are not visible to others until the user that has downloaded the file uploads the next version of the file. With each new version that is attached and uploaded to the contract record, the system will track the user name, ask for notes to help identify the changes, and track the date & time of the new document (file). This helps with version tracking.

When an authorized user checks-out a file and downloads the file, the file is downloaded by default on the user's hard disk (and other users typically do not have access to the file that was downloaded to a user's computer until the user uploads the file to the contract record). Keep in mind that each time a user views (downloads) a file or uploads a file, the system tracks their activity in the history log for the contract record.

Note: if your organization's system is configured to enable users to download a file that is checked-out by another user, he or she will see the changes in the file they downloaded, not the changes on a checked-out file that is downloaded on a user's computer. Once the newly modified file is uploaded, other users may see the new file with the updates.

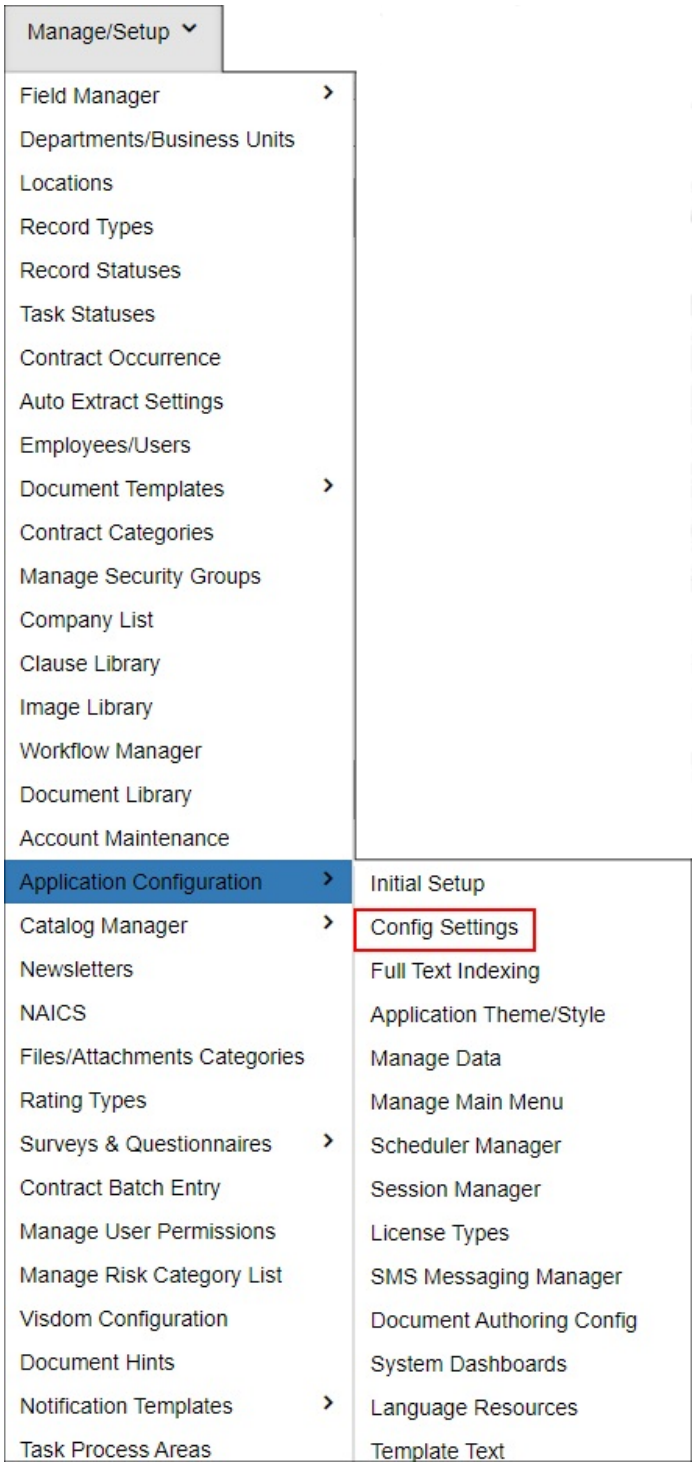
We recommend that you set standards for naming documents and ensure that only the latest versions are available. For example, you can stipulate that each user modifies a document in sequential order based on their assigned contract tasks (workflow). Be sure to communicate your organization's standards so that everyone using the system knows how to use it. Above all, be consistent in reinforcing and using system conventions and workflow conventions. This is critical. If you don't communicate and maintain the protocol, your team won't know how to easily find files and therefore won't use the site effectively, if at all.

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To Enable/Disable Contract Insight Enterprise to support Check-In & Check-Out

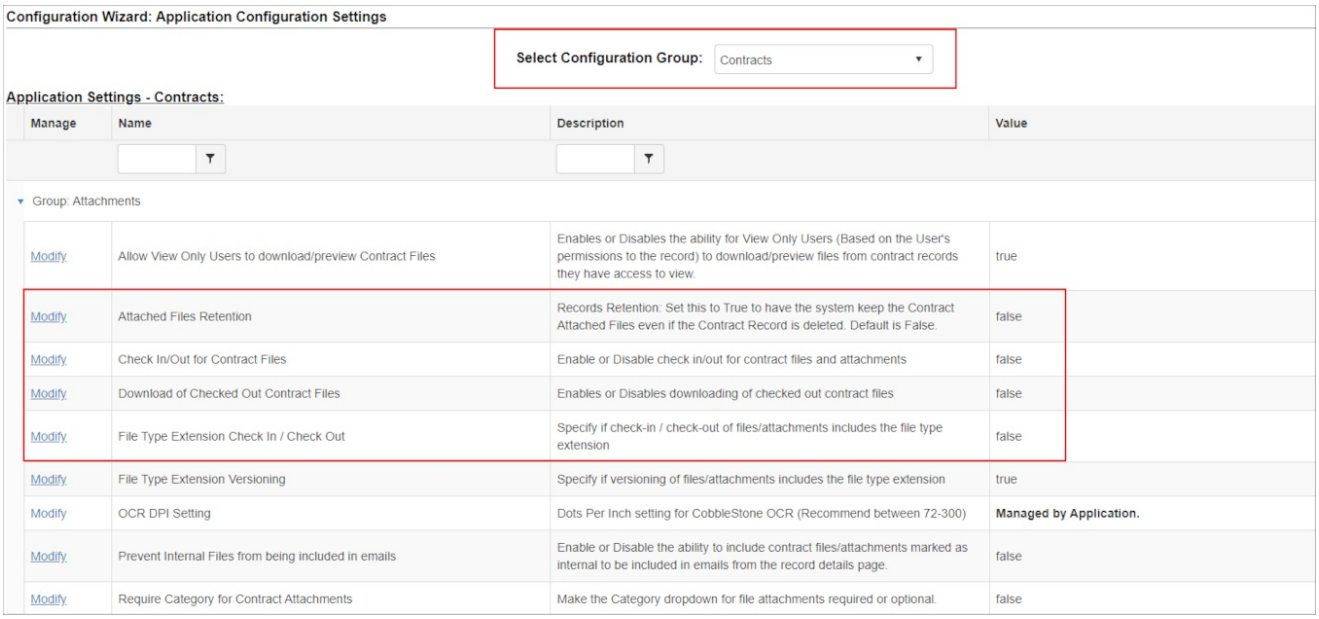
Only authorized and licensed users with the proper permissions can manage the configuration settings.

1. On the top navigation menu, navigate to **Manage/Setup** > **Application Configuration** > **Config Settings**.



2. The **Configuration Wizard: Application Configuration Settings** screen displays. In the **Select Configuration Group** menu, select **Contracts**.

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3. There are three main options:

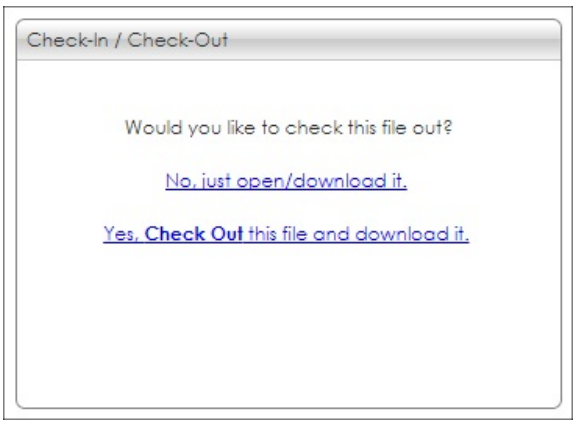
- **Check In/Out for Contract Files**: This will enable or disable the check-in/check-out for contract files and attachments.
- **Download of Checked Out Contract Files**: This will enable or disable the downloading of Checked-Out contract files if **Check-In/Check-Out** is set to True.
- **File Type Extension Check In/Check Out**: This setting specifies whether you would like the Check In/Check Out to include the file type extension (if a document is checked out, will it automatically check out all documents with the same name, no matter the type of file. Set to False to exclude the file type in Check In/Check Out).

4. To change the value of an application setting, click **Modify** for the setting line item.

5. Choose the new value and click **Update Setup Value** to save the new value or click **Cancel** button to cancel changing the application setting's value.

How Contract File Check-In & Check-Out Works

The first file that is uploaded and attached to a contract record is not checked-out unless a user specifically checks-out a file by trying to open or download it.



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1. When an uploaded file is opened by a user, a prompt displays for the user to **Check-Out** or **just open/download it** if the file is not checked-out (note: the user must have the permission to **add attachments to contracts** or be a system admin to check-in a file).

2. If a user tries to open a file that is checked-out, prompt user that the file is checked-out (and checked-out by whom), and ask them if they still want to open it or if they want to close the window (the system can be set via a configuration setting to allow checked-out contract files to be viewed by other users or prohibit the viewing of checked out files by others).

3. If a user uploads a file with the same name as a checked-out file (and they are not the user that checked-out the file), the system will stop the upload process and give a message to the user. The system will allow documents to be uploaded with files names that differ from checked-out files (this allows supporting documentation related to the contract record to be attached to a contract when an individual file is checked-out). This helps maintain consistency during the document editing process.

4. If a user uploads a document with the same name as a checked-out document and the user that checked-out the document is not the same as the user uploading the document (or a system admin), the system provides message that they cannot upload this file because a file with the same name is checked out.

5. System administrators and authorized users that have checked-out a file to check-in any document as a fail-safe. This helps if a user is on a prolonged absence or has been dismissed from their duties.

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Folders: Create New

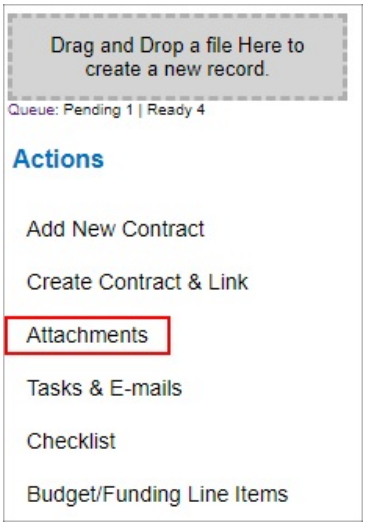
Folders: Create New

Contract Attachments: Create Folders

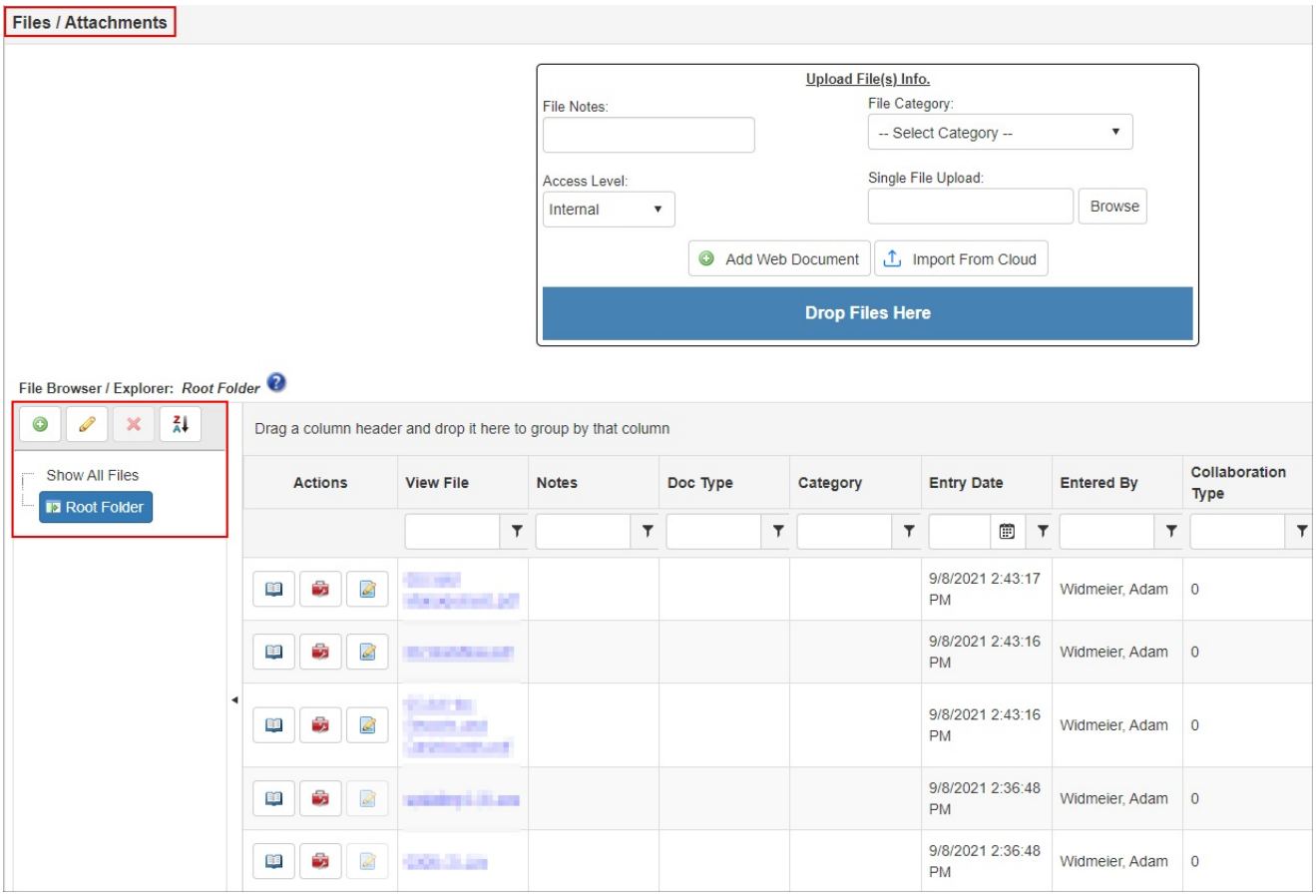
Contract Insight supports the ability to create new folders in the attachment area.

Create New Folder:

Go to a contract record within the system and scroll down to the **Files/Attachments** area or click **Attachments** on the side menu.

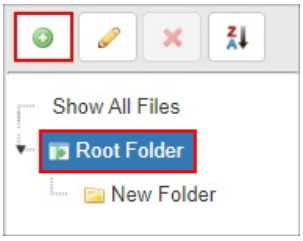


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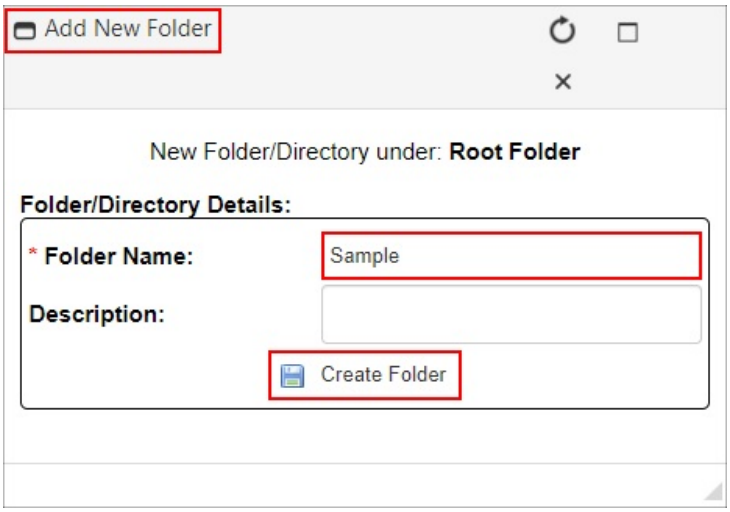
Adding a New Folder

To add a new sub folder to the root folder, click **Root Folder** to highlight it in blue. Then click **+** to add a new folder.

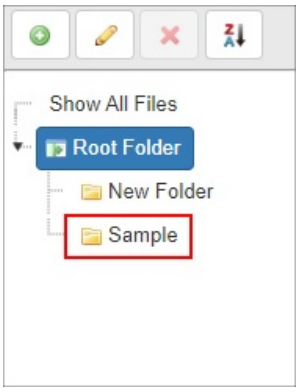


After clicking **+**, the **Add New Folder** pop up screen appears. In the **Folder Name** text box, type in the desired name for the folder. When done, click **Create Folder**. This will create a sub-folder to the root folder.

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As seen below, in the **Attachments** area, the new folder has been added to the root folder as a sub folder. Additional folders and levels of sub-folders can be create the same way.



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Folders: Edit and Move

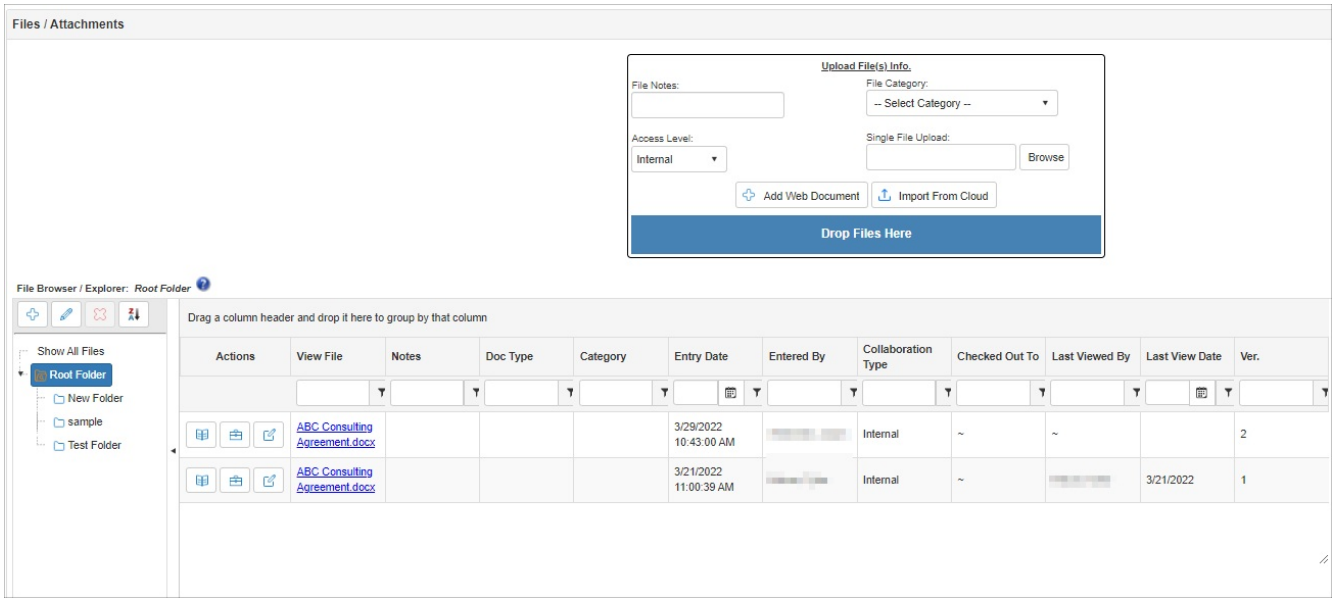
Folders: Edit and Move

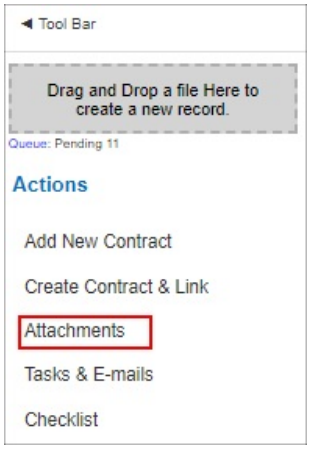
Contract Attachments: Editing and Moving Folders

Contract Insight supports the ability to Edit and Move previously created folders in the attachment area.

Editing and Moving Folders

Go to a contract record within the system and scroll down to the **Files/Attachments** area or click **Attachments** on the side menu.

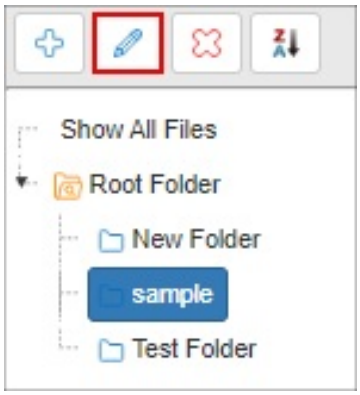




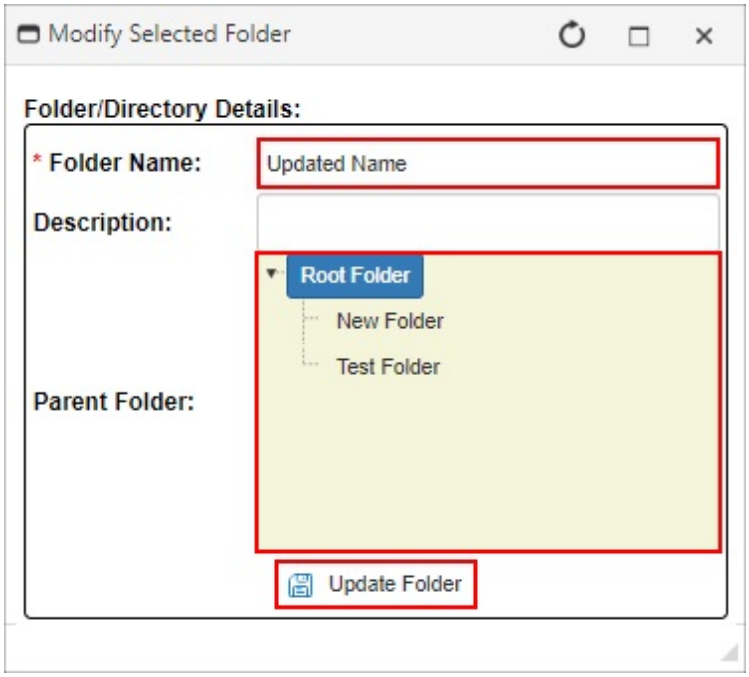
Editing a Folder

To edit a folder, click the folder to highlight it in blue. Click the **Pencil** icon to edit the folder.

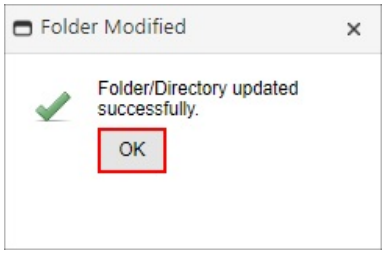
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The **Modify Selected Folder** pop up screen appears to allow editing of the Folder Name, Description, and what Parent Folder under which this folder should be located. Once all changes have been completed, click **Update Folder**.



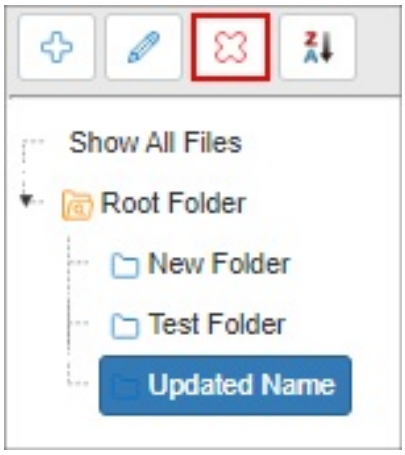
The next pop up screen, **Folder Modified**, appears to let the user know that the Folder/Directory updated successfully. Click **OK** to see the changes.



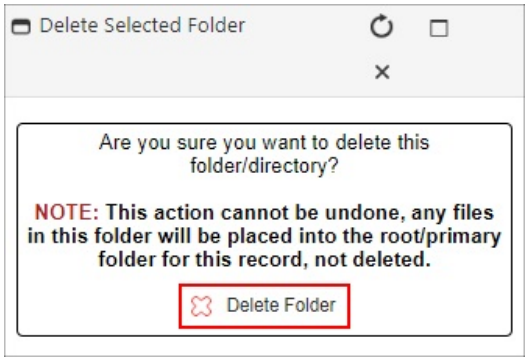
Deleting a Folder

To delete a folder, click the folder to highlight in blue. Once the folder is highlighted, click the red **X** icon to delete it.

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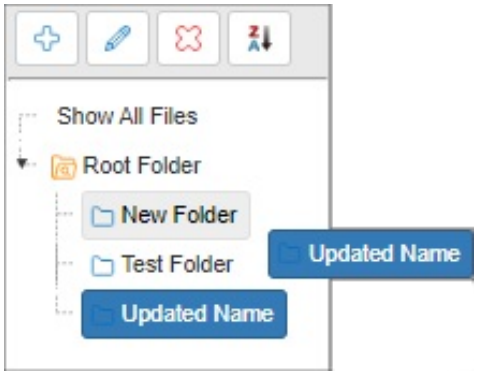
The Are you sure you want to delete this folder/directory? prompt displays. Click **Delete Folder** to confirm removal of the folder.



Moving Folders:

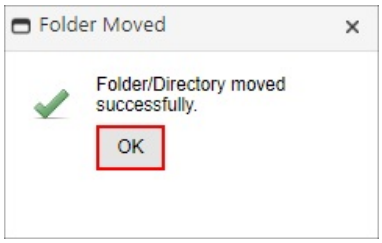
To move a folder, click the folder to highlight in blue.

Next, drag the folder to the root folder or any other folder. Once the destination folder turns gray, let go of the mouse to add that folder.

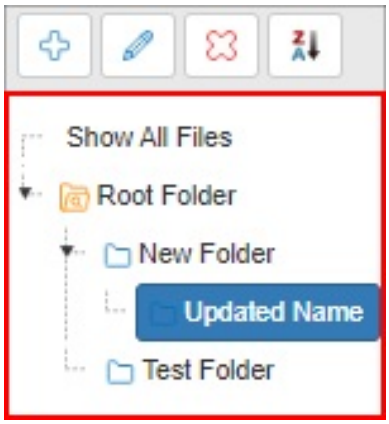


Once the folder is moved, a prompt displays: Folder/Directory move successfully. Click **Ok**.

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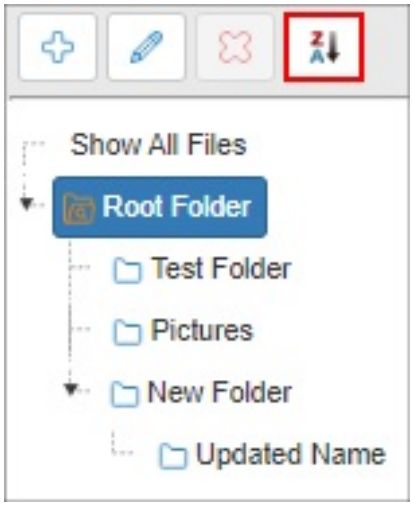


As seen in the image below, the folder was moved to the **New Folder**.



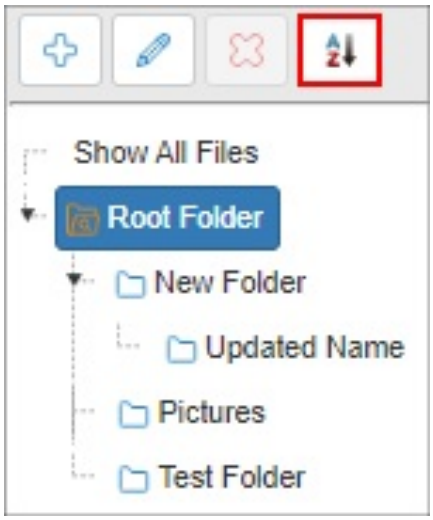
Sorting Folders:

To sort folders in ascending order, click **Z to A**.



To sort folders in descending order, click **A to Z**.

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Reattach File as PDF

Reattach File as PDF

Contract Attachments: Reattach File as a PDF

This functionality has been replaced with automatic processing.

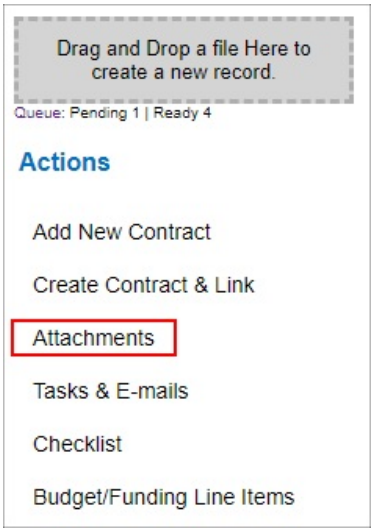
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Viewing/Downloading Contract Attachments

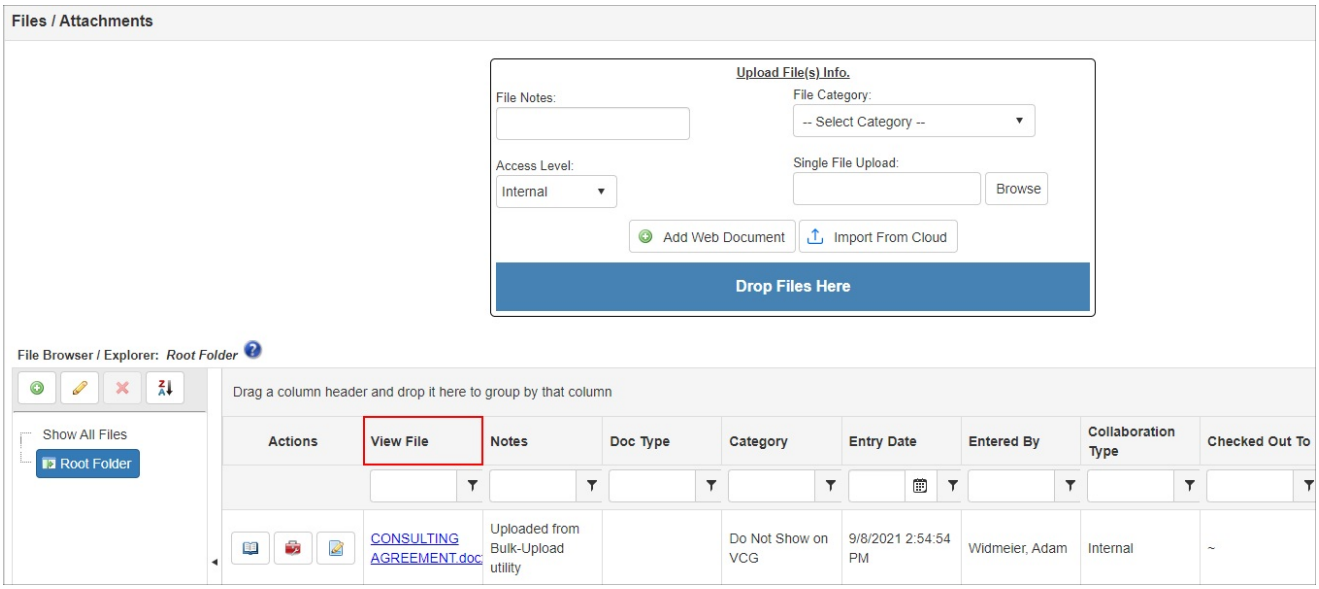
Viewing/Downloading Contract Attachments

Contract Attachments: Viewing/Downloading

Access the attachments section of the **Contract Details** screen by clicking **Attachments** on the side menu or by scrolling down the screen.



In the **Files/Attachments** section, a list of all Files/Attachments that have been attached to the Contract Record displays.



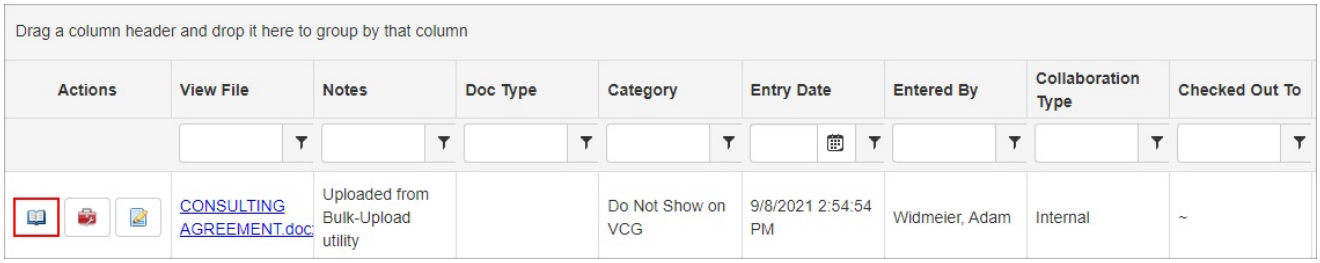
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To View/Download an Attached File

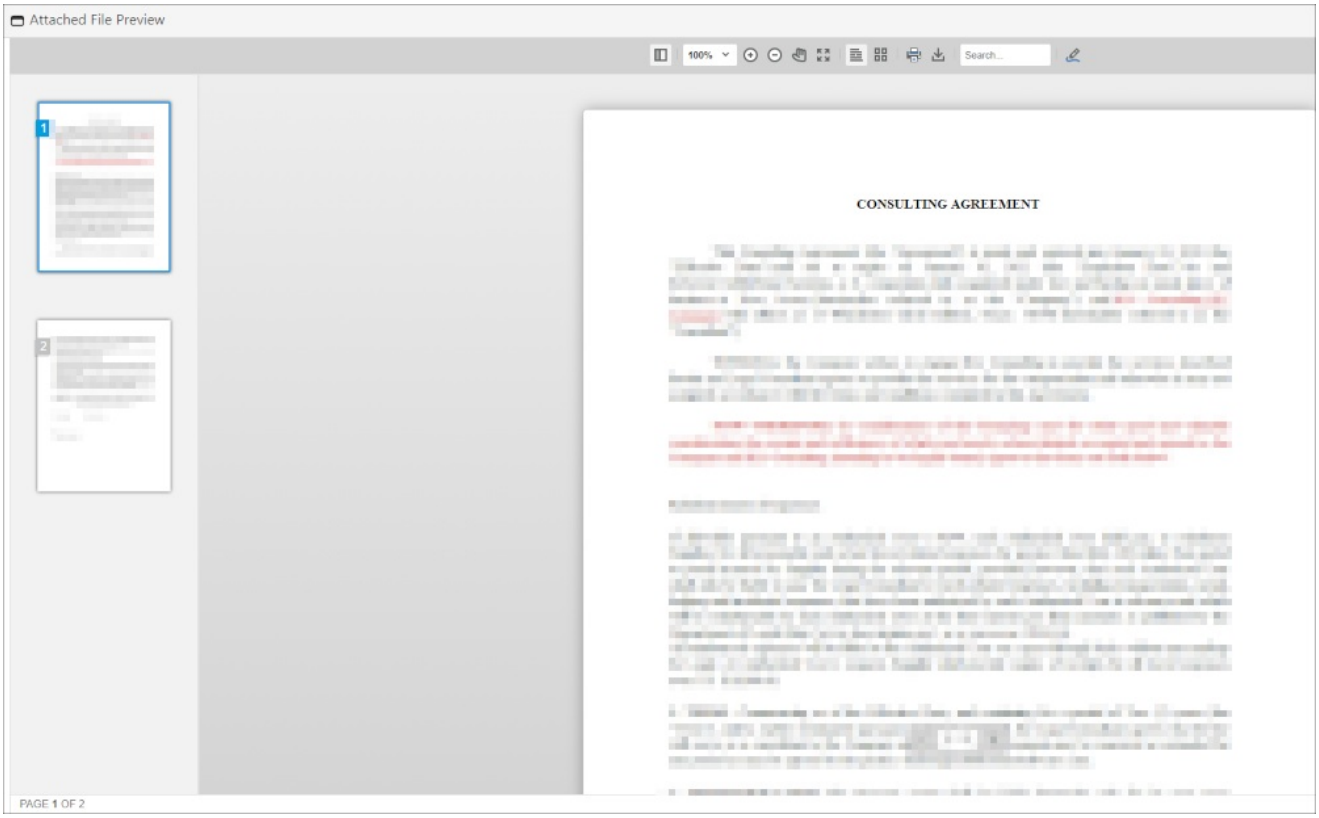
1. Click the File Name in the **View File** column.
2. Depending on whether or not your organization has the **Contract File Check In/Check Out** feature enabled or disabled, the document may need to be checked out.

Online Document Previewer Tool

1. To open a document using the Online Document Previewer Tool, scroll down to the necessary file/attachment. From here, click the **blue book icon**.



This will open the document in a pop-up window (as seen pictured below).



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NOTE: The file formatting and content may not be fully viewable and may be lost, including images, content, comments, etc. when using the Online Previewer tool and the user should **check the file and review its content** in the file's native format.

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Attachment Level Viewing Privileges

Attachment Level Viewing Privileges

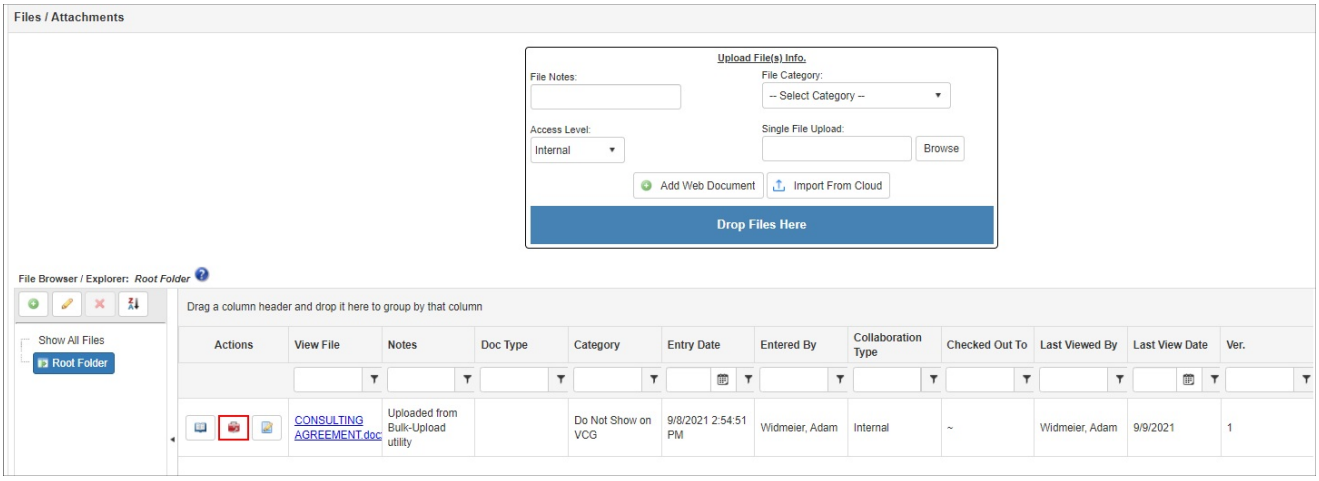
Contract Attachments: Attachment Level Viewing Privileges

CobbleStone allows the Application Administrator to allow/restrict users' attachment viewing privileges.

Note: Prior to activating the attachment level viewing restrictions, all authorized viewers of the current contract record will have full attachment level viewing privileges.

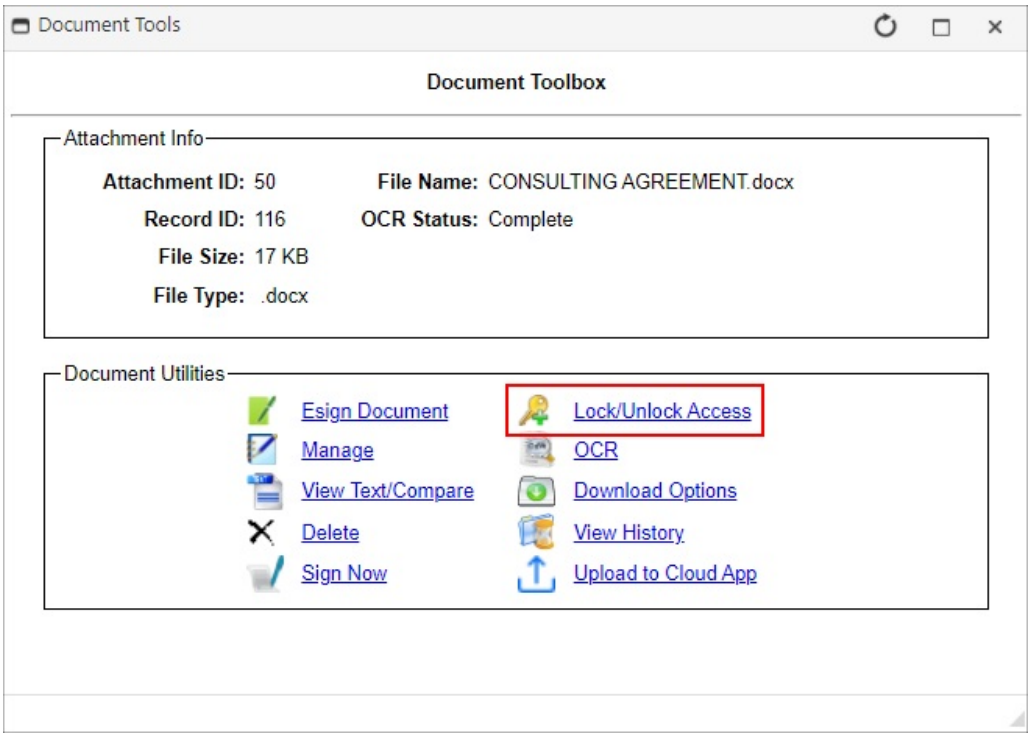
To activate attachment level viewing permissions:

1. Click the **Toolbox icon** next to the file name for the line item for which to edit users' attachment viewing privileges.

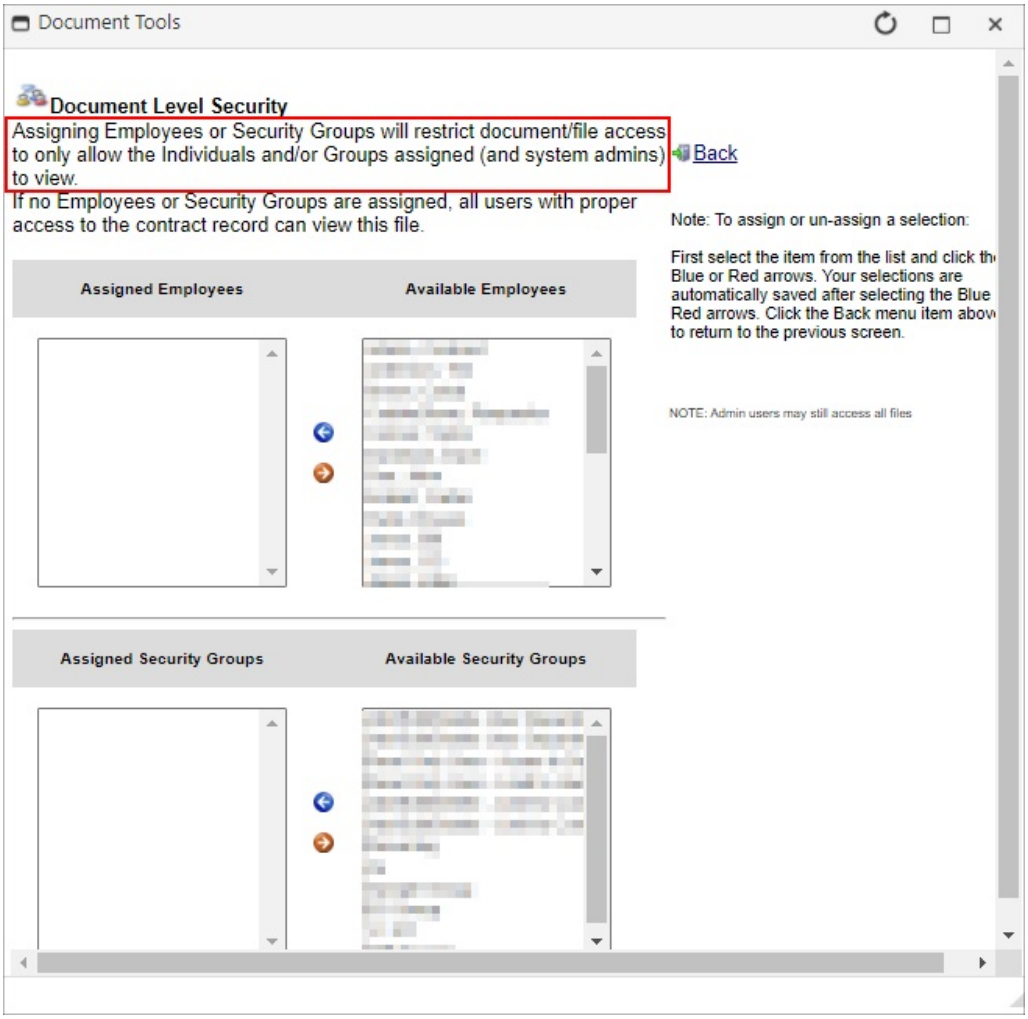


2. Click **Lock/Unlock Access**.

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3. The **Document Level Security: Assign Employees** screen displays.



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4. To assign an employee the permission to view the attachment, select the name of the employee in the **Available Employees** box and click the **Blue Left Arrow** to add the employee's name to the **Assigned Employees** box.

Note: Employees in the **Assigned Employees** box have permission to view the attachment. Be sure to add yourself as an **Assigned Employee** so you are able to view the attachment.

5. To remove an employee's permission to view the attached file, select the employee's name in the **Assigned Employees** box and click the **Red Right Arrow**.

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Folders : Move Files

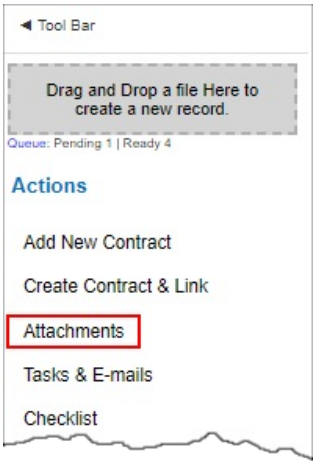
Folders: Move Files

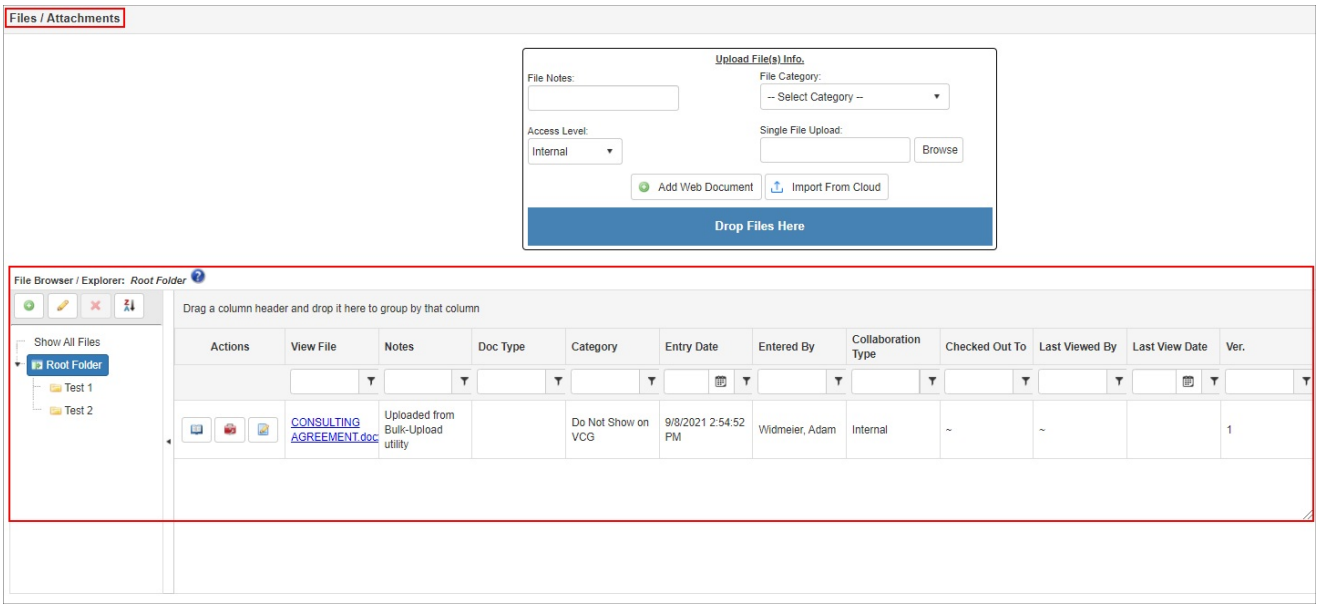
Contract Attachments: Moving Files Into Folders

Contract Insight supports the ability to move files from folder to folder in the attachment area.

Moving Files from Folder to Folder

On a contract record within the system, click **Attachments** on the side menu or scroll down to the **Files/Attachments** area.

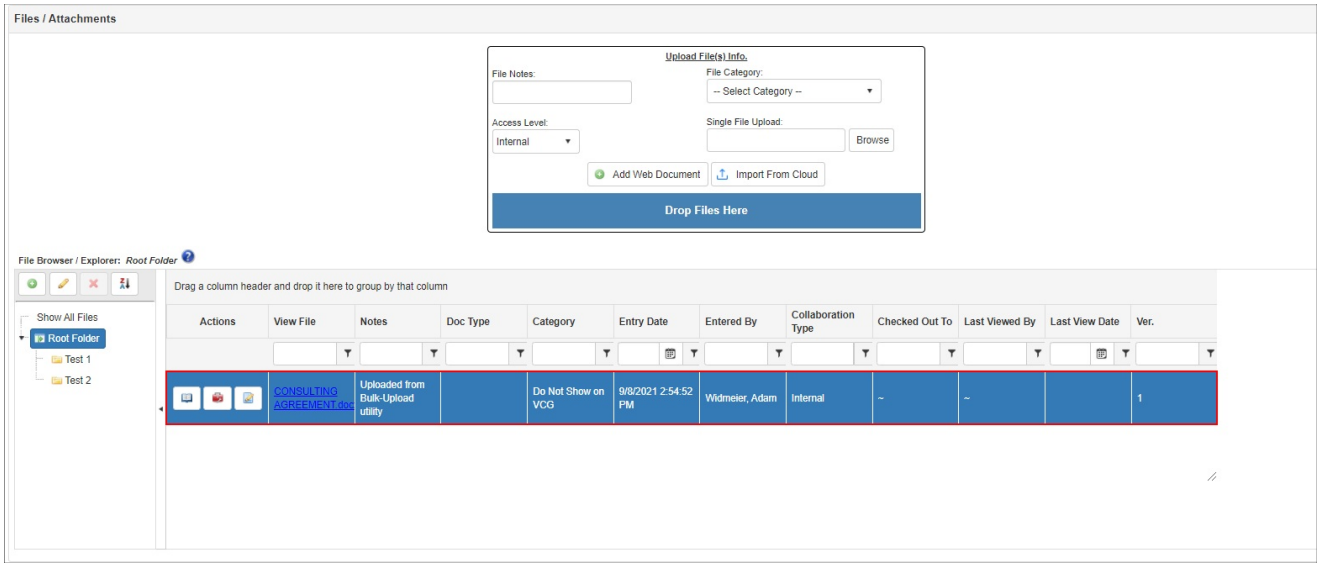




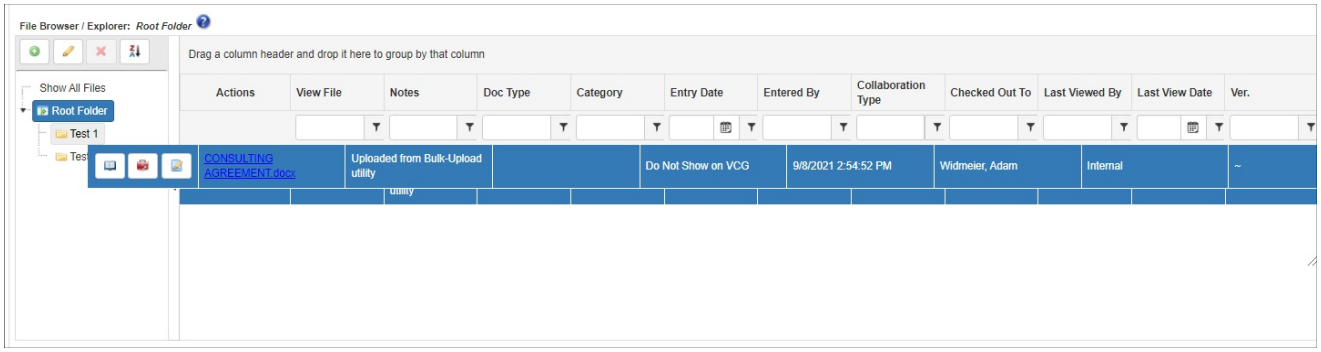
Moving File to Another Folder

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To move one file to another folder, click the file to highlight it. To move multiple files at once, just click one and hold the **Shift** key or **Ctrl** key for the rest.



Drag the file(s) to the folder. Once the destination folder turns gray, let go of the file(s).

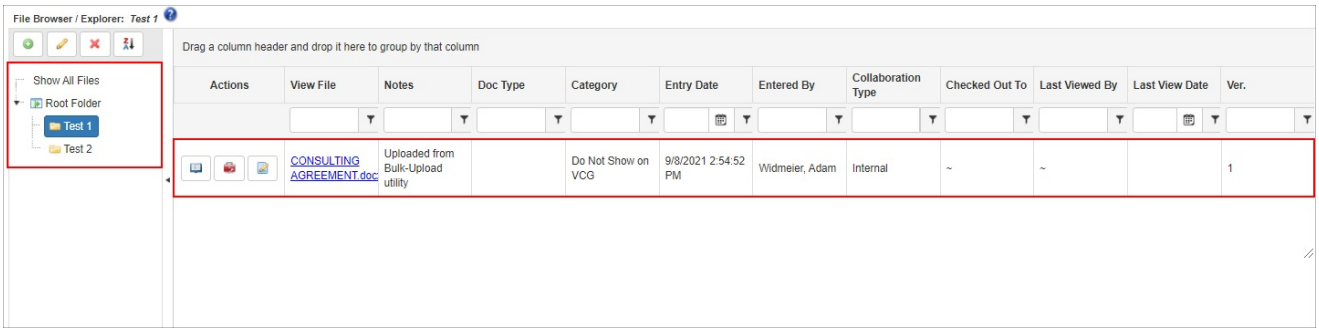


Once the file(s) is dropped this prompt appears saying [Number] File(s) successfully moved to folder. Click **OK**.



Optionally, click the folder to which the file was moved to view it in its new location.

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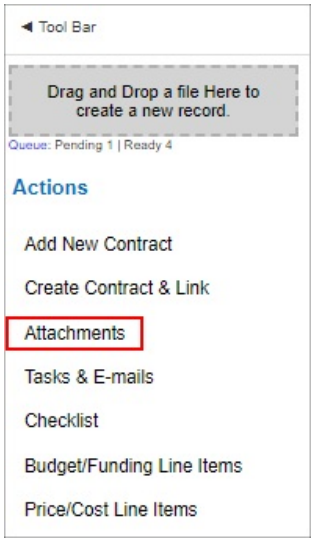
OCR PDF

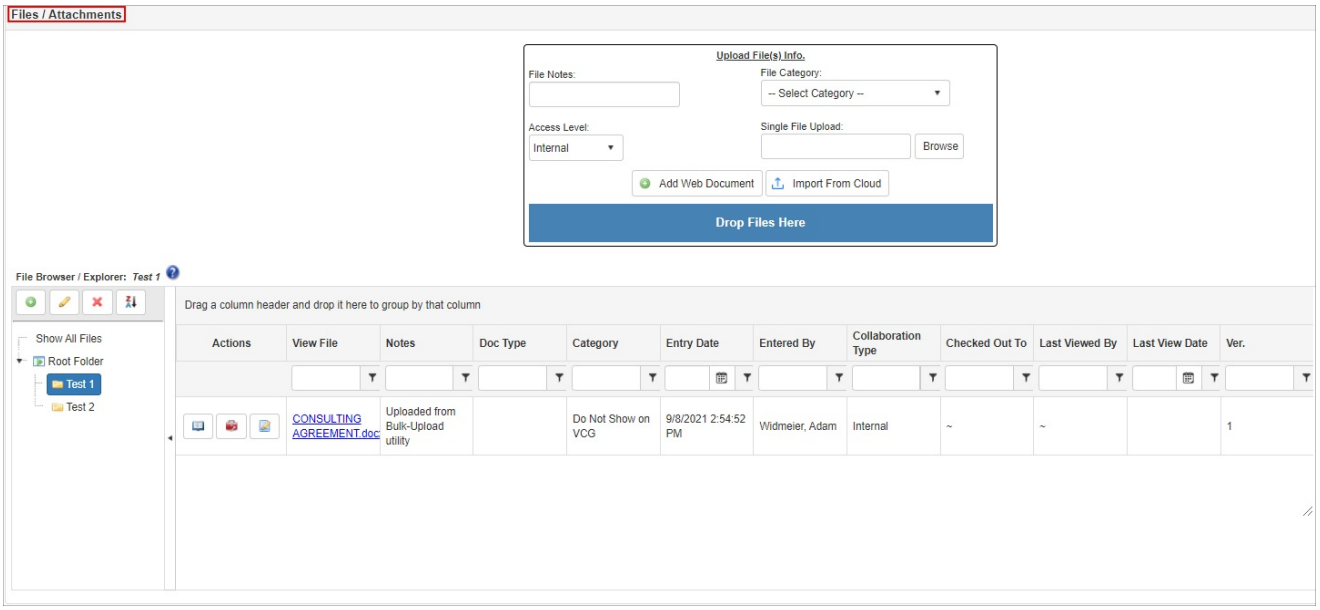
OCR PDF

Contract Attachment: OCR a PDF

Contract Insight automatically processes attached PDF files on a scheduled basis which provides a high level of detail and insight into the test of attached files.

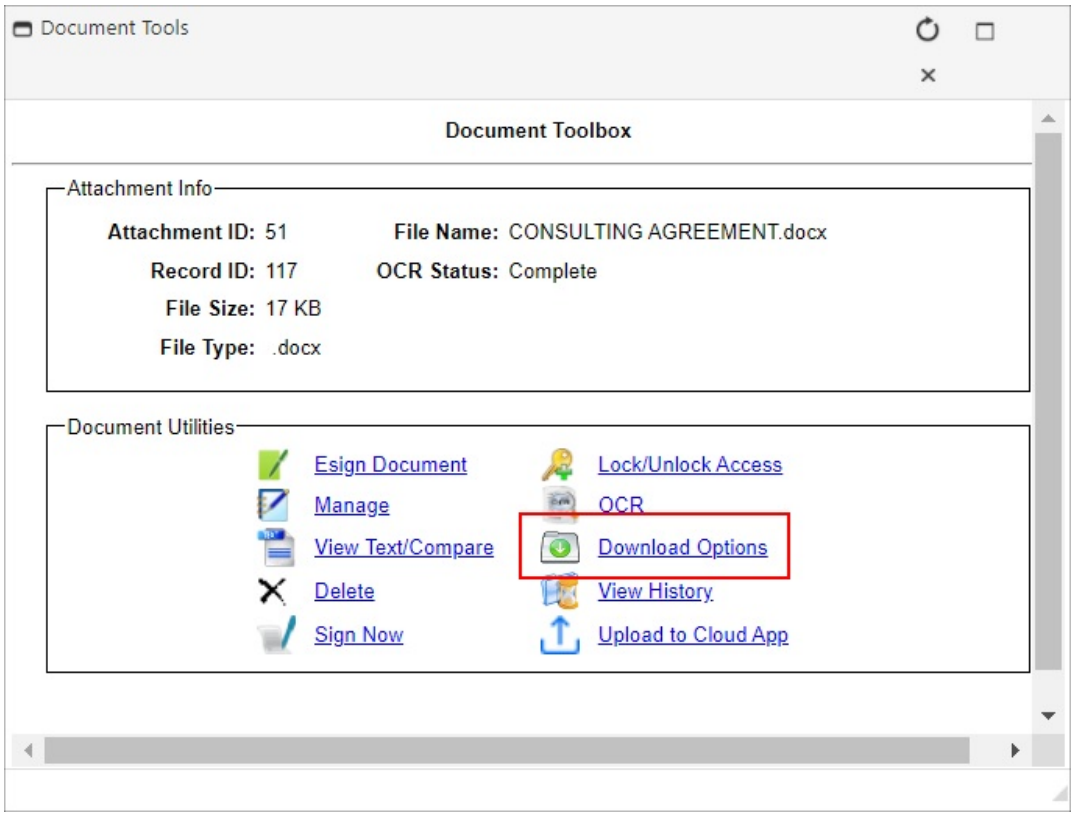
Go to a contract record within the system and click **Attachments** on the side menu or scroll down to the **Files/Attachments** area.



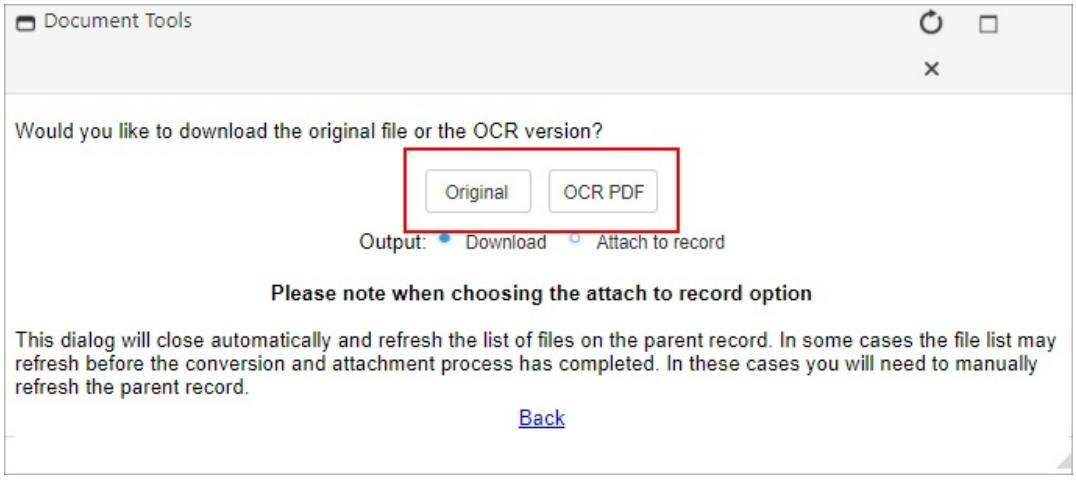


Click the **red toolbox icon** () to view the file options. A pop-up windows of files options displays. Click **Download Options**.

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A screen containing the options for download displays.



Download the file in its original format, OCR version, or MS Word.

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Convert PDF to Word

Convert PDF to Word

This functionality has been replaced with native conversion to Word and PDF.

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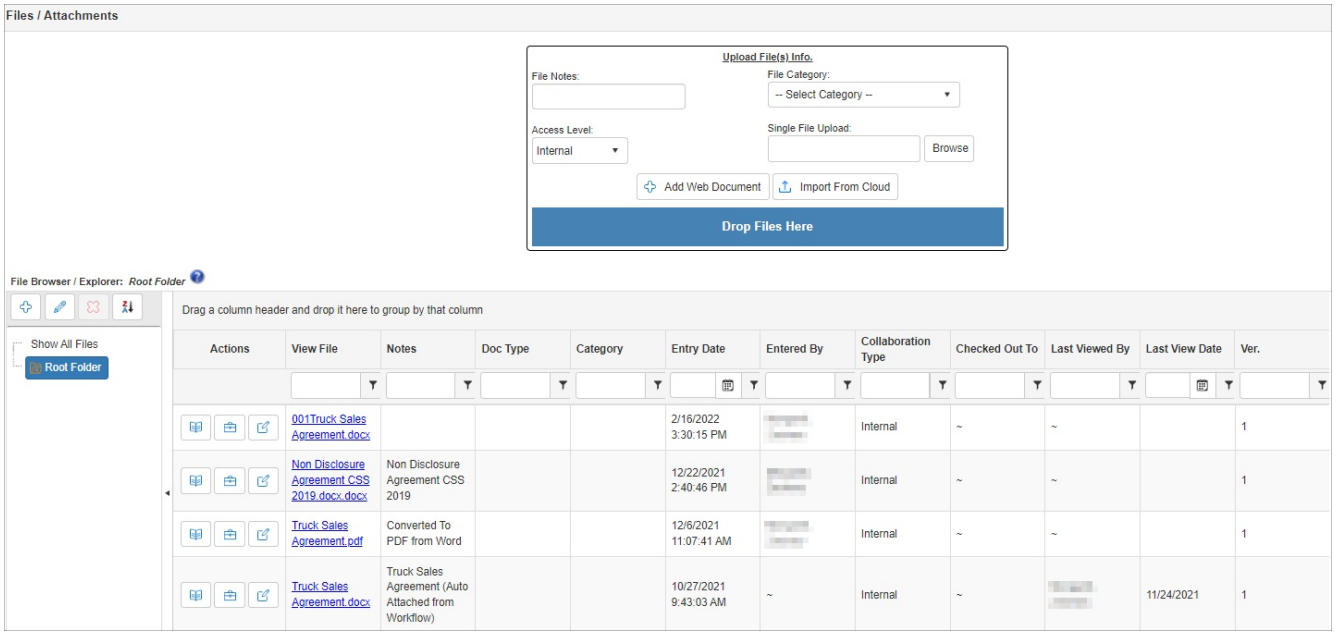
Delete an Attachment

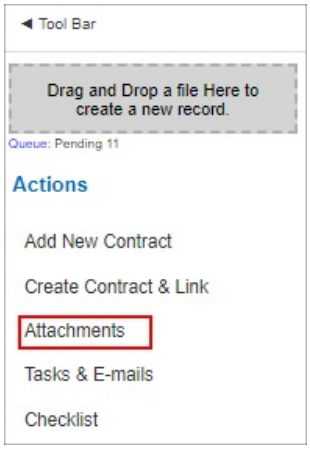
Delete an Attachment

Contract Attachments: Deleting an Attachment

Contract Insight supports the ability to Delete a file from the **Files/Attachments** area.

Navigate to a contract record within the system and scroll down to the **Files/Attachments** area or click **Attachments** on the side menu.

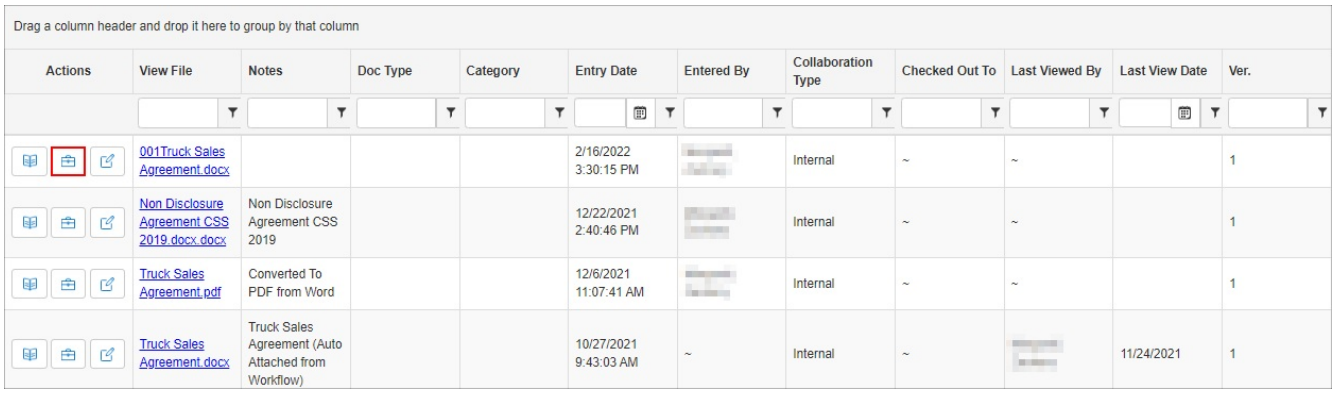




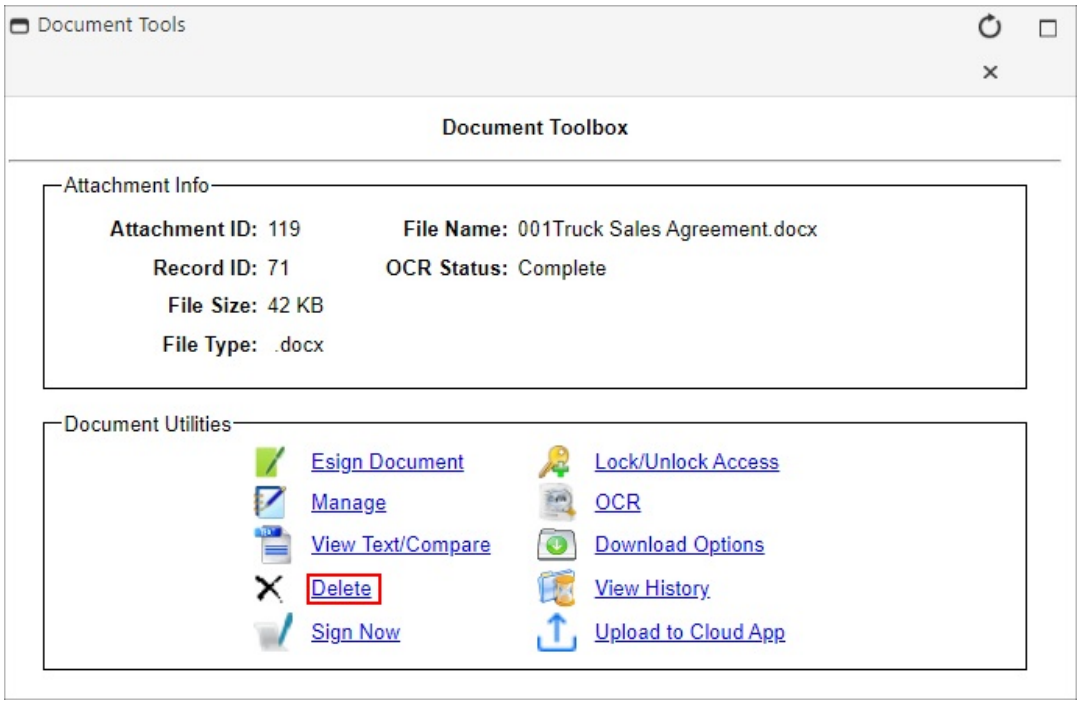
Deleting a File/Attachment

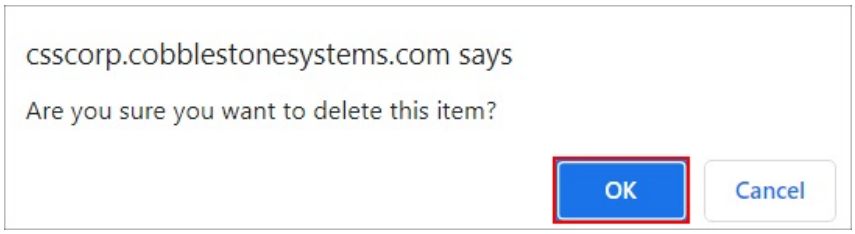
To Delete a file/attachment, click the **Red Toolbox** icon to the left of the file.

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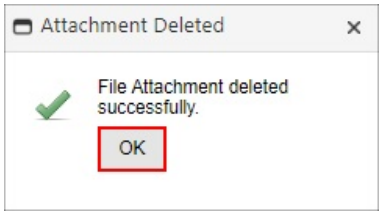


The **Document Toolbox** pop up screen appears. Click **Delete**. A prompt appears indicating Are you sure you want to delete this item? Click **OK**. Close the **Document Toolbox** by clicking the **X** in the upper right corner.



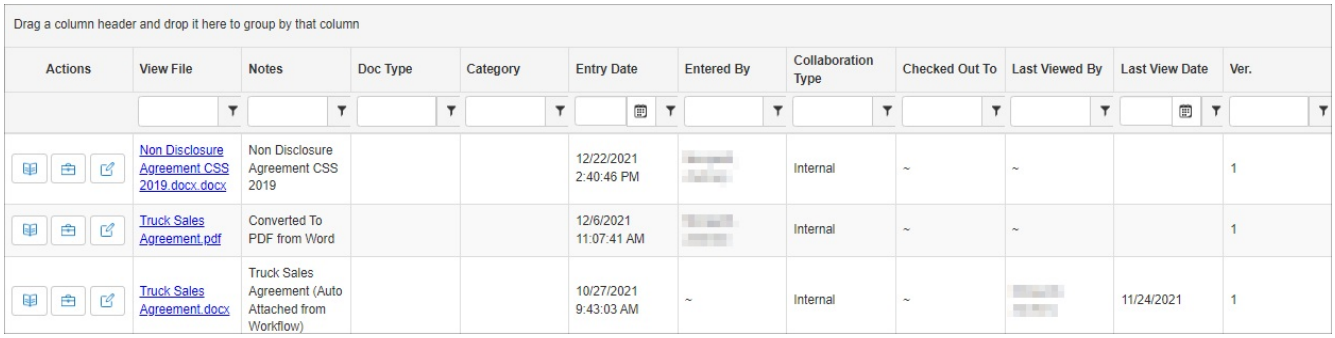


The File Attachment Deleted successfully prompt displays. Click **OK**.



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The file/attachment is deleted from the attachment area.


Drag a column header and drop it here to group by that column

Actions	View File	Notes	Doc Type	Category	Entry Date	Entered By	Collaboration Type	Checked Out To	Last Viewed By	Last View Date	Ver.
	Non Disclosure Agreement CSS 2019.docx.docx	Non Disclosure Agreement CSS 2019			12/22/2021 2:40:46 PM	[redacted]	Internal	~	~		1
	Truck Sales Agreement.pdf	Converted To PDF from Word			12/6/2021 11:07:41 AM	[redacted]	Internal	~	~		1
	Truck Sales Agreement.docx	Truck Sales Agreement (Auto Attached from Workflow)			10/27/2021 9:43:03 AM	~	Internal	~	[redacted]	11/24/2021	1

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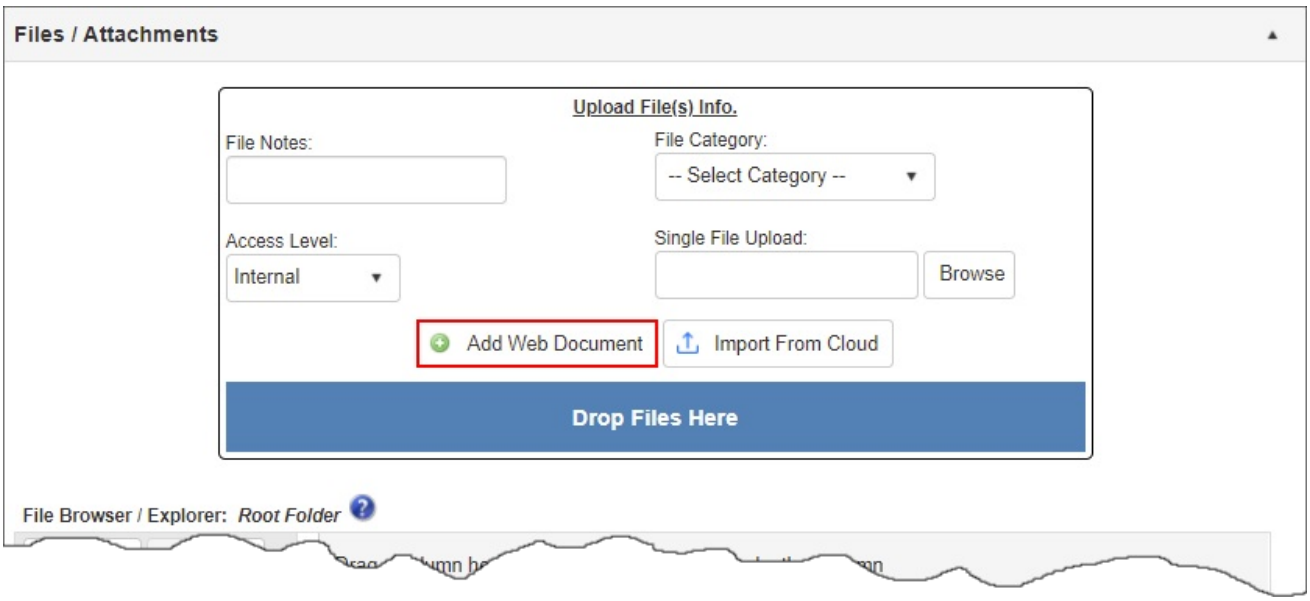
Online Document Editing

Online Document Editing

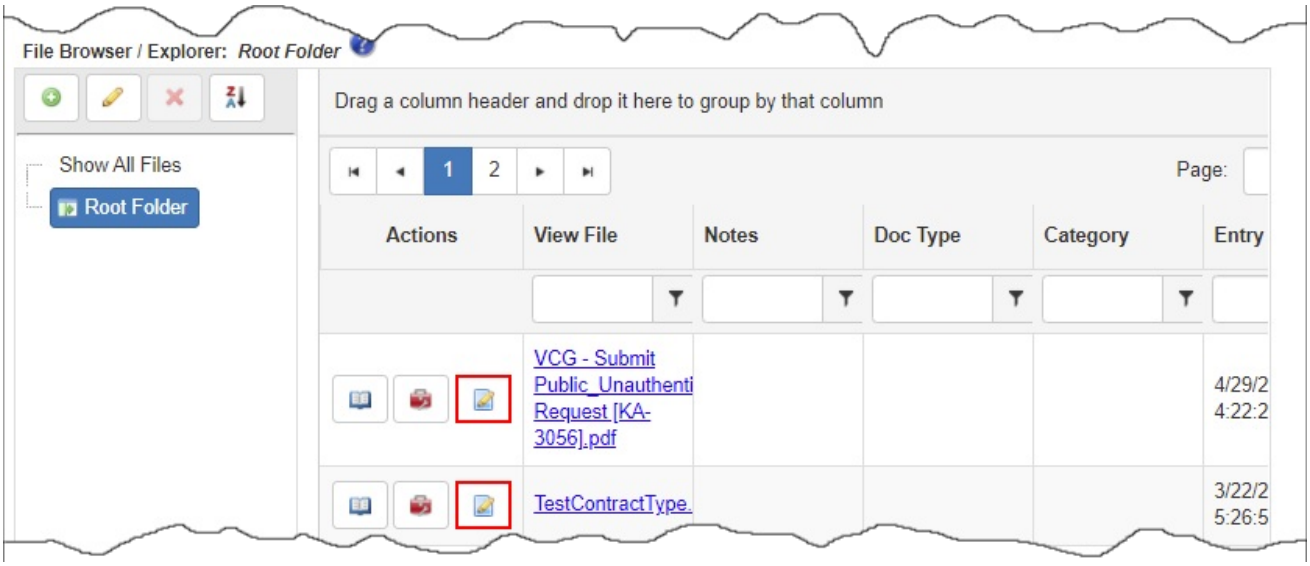
Online Document Editing on a Record

Online Document Editing is a feature that enables users to create a new Web Document or edit a File/Attachment directly from a record in CobbleStone. The options for document editing are similar to other word processing tools with the ability to insert clauses found in the Clause Library.

When adding a new web document, navigate to the Files/Attachments subtable, then click **Add Web Document**.

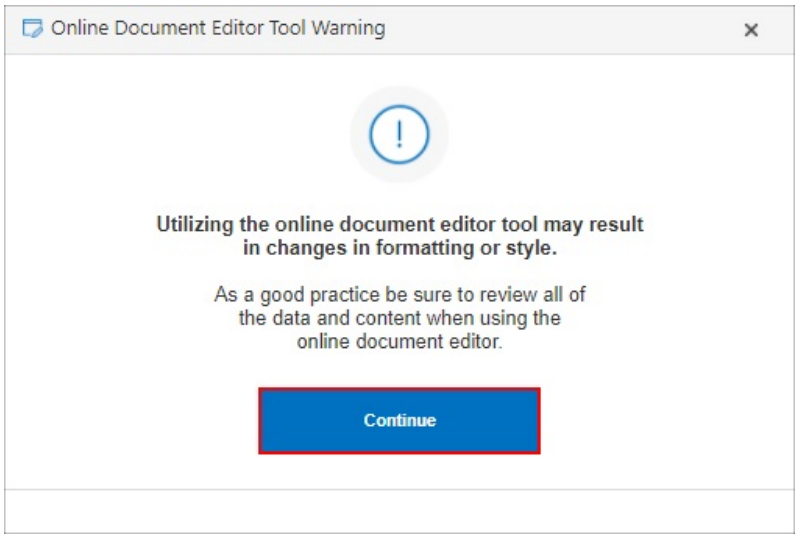


When editing a previously attached document, navigate to the desired record, then to the Files/Attachments subtable, and click the **pencil and paper icon**.



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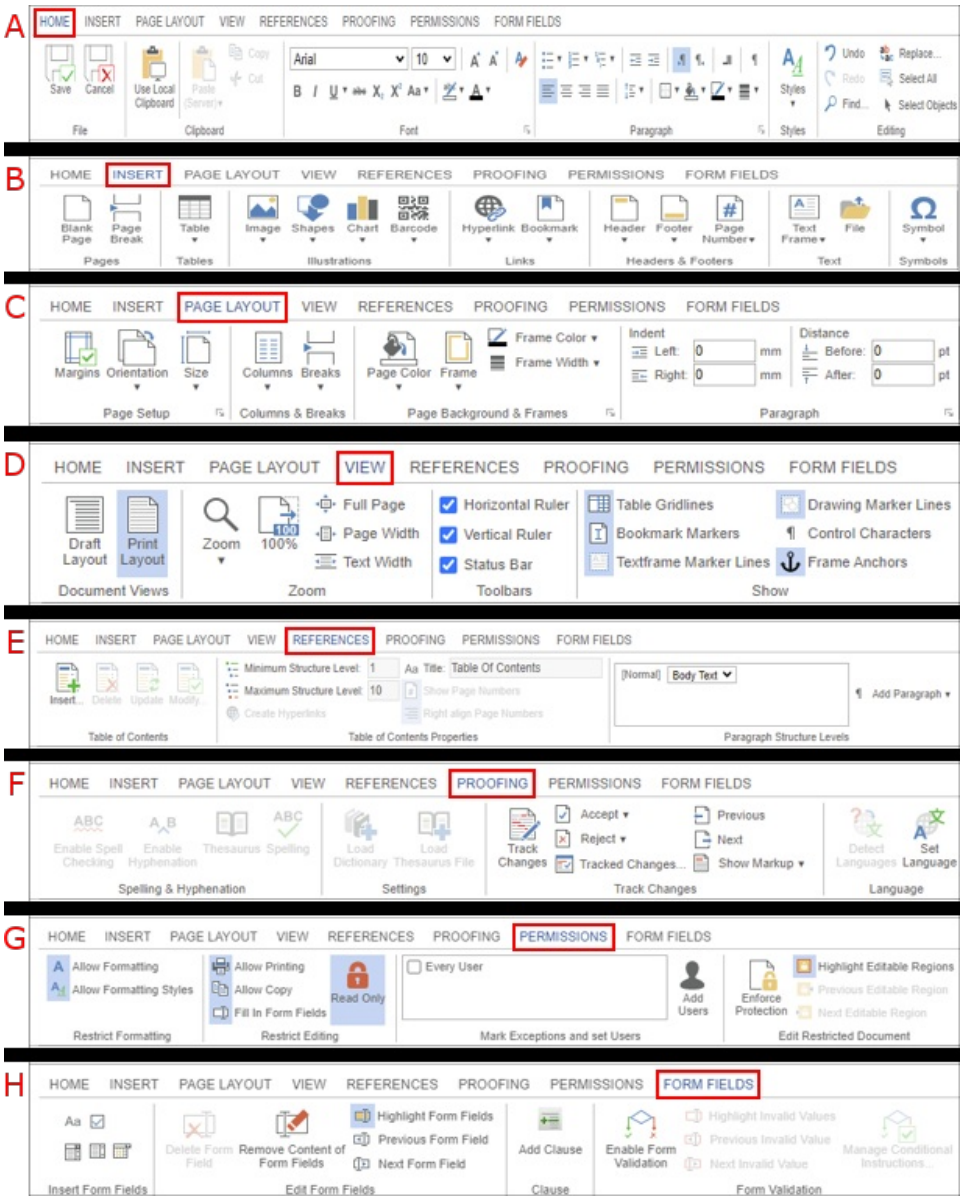
Upon loading a document, a new disclosure message will appear. Users will be required to click **continue** before proceeding to the Online Document Editor.



Upon saving, the document is auto-attached to the new record as a new version.

Users have a plethora of processing and document editing tools to their disposal. Below are all editing ribbons available to users when editing a document online.

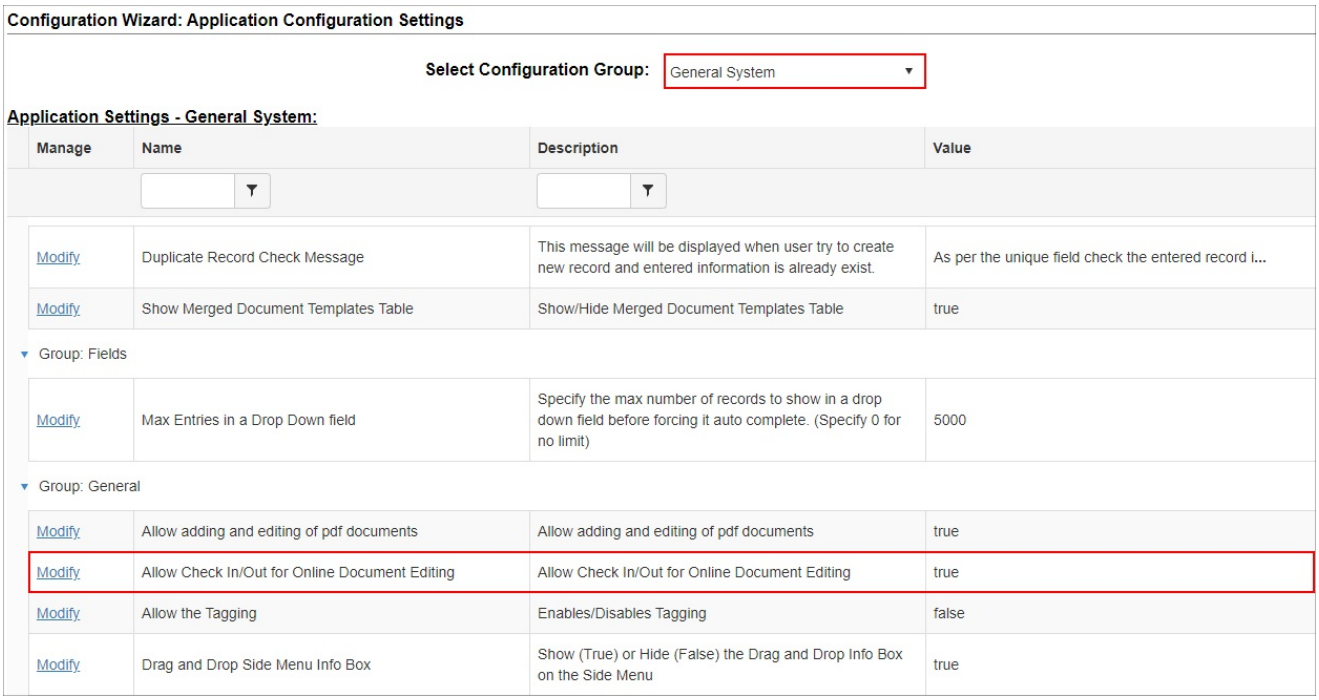
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Check In/Check Out Online Document Editing

A new configuration setting has been added to allow Check In and Check Out functionality for Online Document Editing. If set to false, **ALL** files will be checked back in.

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NOTE: The file formatting and content may not be fully viewable and may be lost, including images, content, comments, etc. while using the Online Editor tool and the user should **check the file and review its content** in the file's native format.

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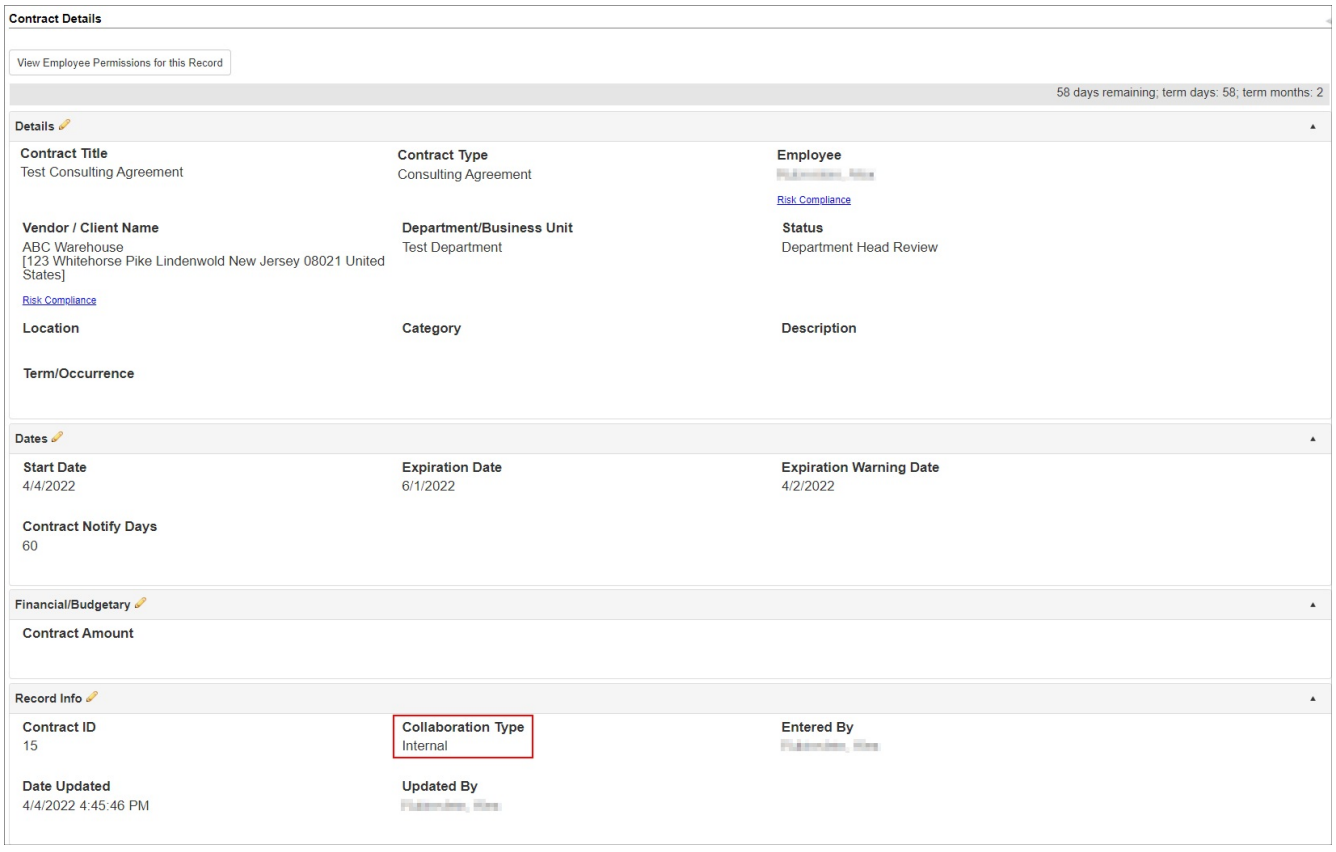
Contract Records on the Vendor/Client Gateway

Contract Records on the Vendor/Client Gateway

Contract Details on the Vendor/Client Gateway: Overview

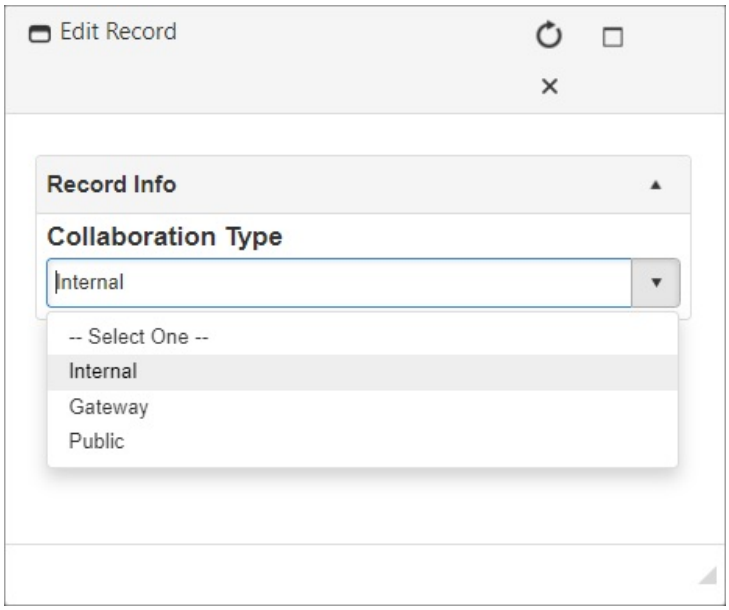
If your organization has purchased the **Vendor/Client Gateway** optional add-on module, there are fields on the Contract Details screen that should be paid special attention in order to properly manage whether a Contract's field(s) are displayed on the Gateway for Vendors/Companies to view.

On the Contract Details screen, the **Collaboration Type** field allows users to designate the Contract Record for displayed on the **Vendor/Client Gateway**.



Available Collaboration Types:

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- **Internal**: The Contract Record Details screen is only able to be viewed internally.
- **Gateway**: The Contract Record Details screen will be available to be viewed on the Vendor/Client Gateway by Vendors who sign-up and login to the Gateway.
- **Public**: The Contract Record Details screen will be available to be viewed by the general public through the **Public Portal** option of the Vendor/Client Gateway (Vendors/Clients do not need to sign-up or login to the Gateway).

Note: The Public Portal is a part of the **Vendor/Client Gateway** Optional Add-On that needs to be setup and configured in addition to the Gateway.

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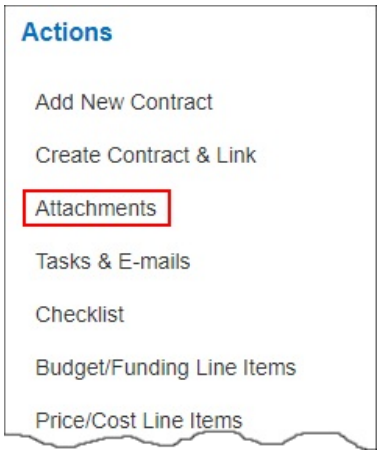
Contract Attachments on the Vendor/Client Gateway

Contract Attachments on the Vendor/Client Gateway

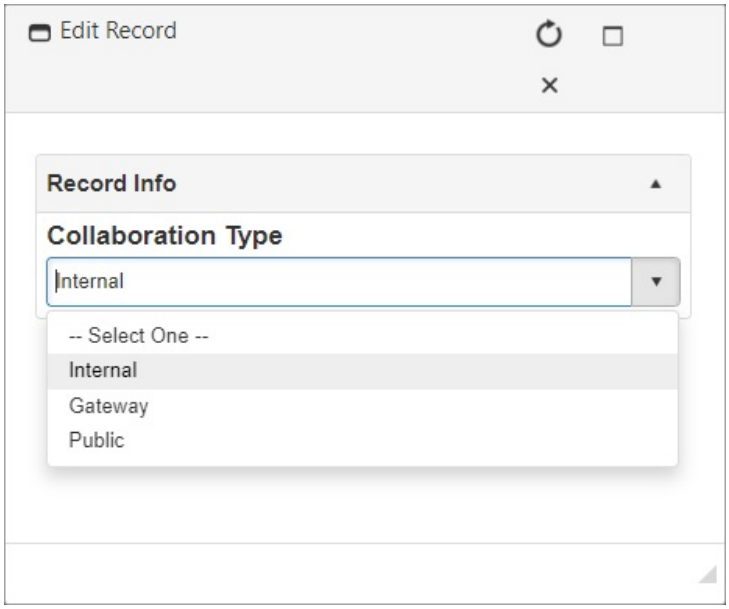
Contract Details on the Vendor/Client Gateway: Displaying a Record's Files/Attachments

If your organization has purchased the optional add-on module for the Vendor/Client Gateway, there are options to choose whether you would like to display a File/Attachment for that Contract Record on the Vendor/Client Gateway for Vendors/Companies to log-in and see the files/attachments for the Contract Record.

1. On the **Contract Details** screen, click **Attachments** on the side menu or scroll down to navigate to the **Files/Attachments** section of the screen.



2. Select **Collaboration Type** from the drop down menu.



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The available options are:

- **Internal**: The file/attachment will only be able to be viewed internally
- **Gateway**: The file/attachment will be available to be viewed on the Vendor/Client Gateway by Vendors who sign-up and login to the Gateway.
- **Public**: The file/attachment will be available to be viewed by the general public through the **Public Portal** option of the Vendor/Client Gateway (Vendors/Clients do not need to sign-up or login to the Gateway).

Note: The **Public Portal** is a part of the **Vendor/Client Gateway** Optional Add-On that needs to be setup and configured in addition to the Gateway.

3. Once you have selected the Collaboration Type, upload your file via the browse option or by dragging the file(s) into the **Drop Files Here** box.

Note: Once a Collaboration Type has been selected and the File/Attachment has been saved, change the Collaboration Type by clicking the **File/Attachment's Toolbox** icon, and then clicking **Manage**.

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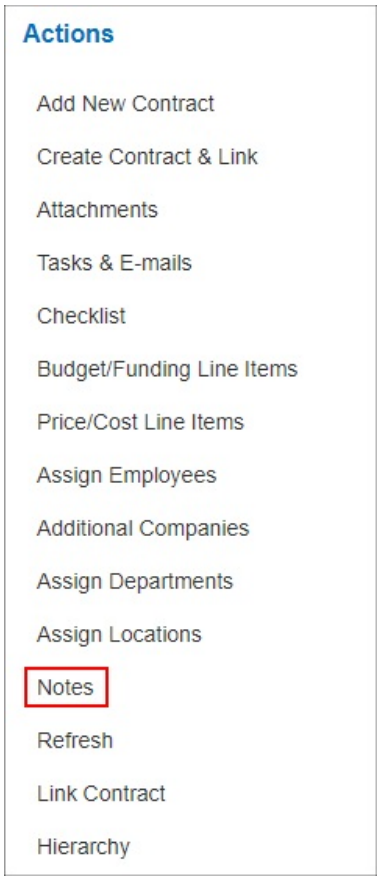
Contract Notes on the Vendor/Client Gateway

Contract Notes on the Vendor/Client Gateway

Contract Details on the Vendor/Client Gateway: Displaying a Record's Notes

If your organization has purchased the **Vendor/Client Gateway** optional add-on module, there are options to choose whether you would like to display a Note in the **Notes & Comments** section (also referred to as the **Notes Repository**) for that Contract Record on the Vendor/Client Gateway for Vendors/Companies to log-in and see the notes for the Contract Record.

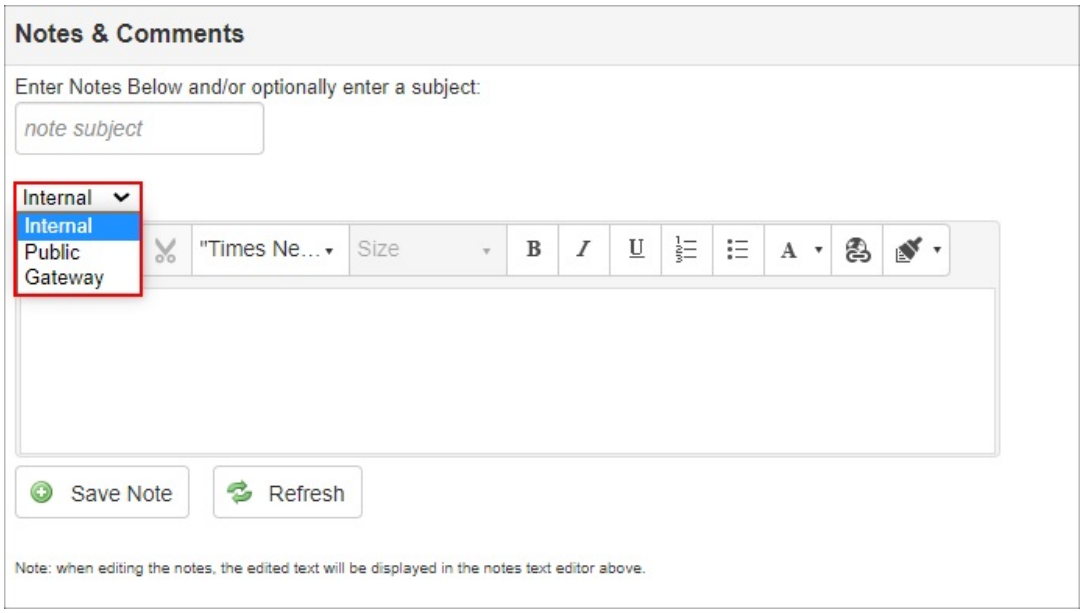
1. On the **Contract Details** screen, click **Notes** on the side menu or scroll down to navigate to the **Notes, Comments, & Diary Log** section of the screen.



2. Enter the note text into the Word-like text editor box. Optionally, enter a note subject (optional).

3. Using the drop-down menu, select the **Collaboration Type** to assign to the note.

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The available options are:

- **Internal**: The note will only be able to be viewed internally.
- **Gateway**: The note will be available to be viewed on the Vendor/Client Gateway by Vendors who sign-up and login to the Gateway.
- **Public**: The note will be available to be viewed by the general public through the **Public Portal** option of the **Vendor/Client Gateway** (Vendors/Clients do not need to sign-up or login to the Gateway).

Note: The **Public Portal** is a part of the **Vendor/Client Gateway** Optional Add-On that needs to be setup and configured in addition to the Gateway.

4. Click **Save Note** to save the note to the Contract Record.

Note: Once a Collaboration Type has been selected and the Note has been saved, you cannot change the Collaboration Type. If you select the wrong Collaboration Type, you can click the "Edit" link for the Note line item, change the Collaboration Type, and click **Save Note** (this will create a new note line item), but you must then delete the original note with the incorrect Collaboration Type.

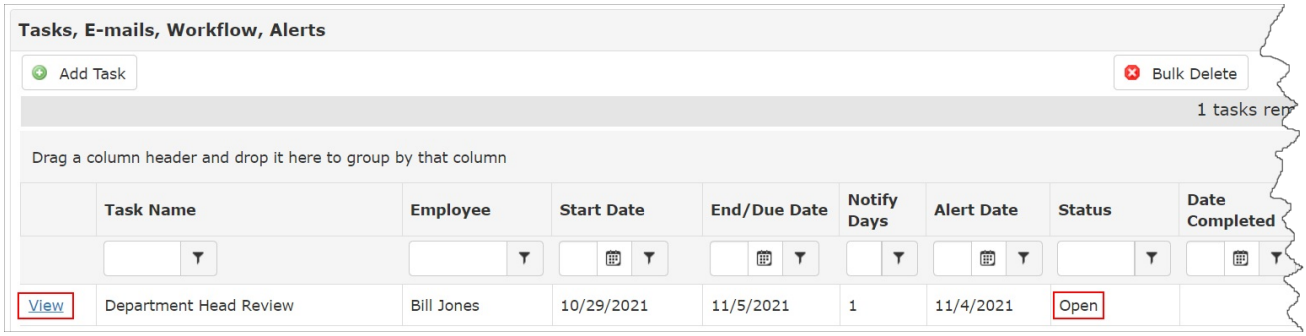
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Acting Upon/Approving/Rejecting a Task

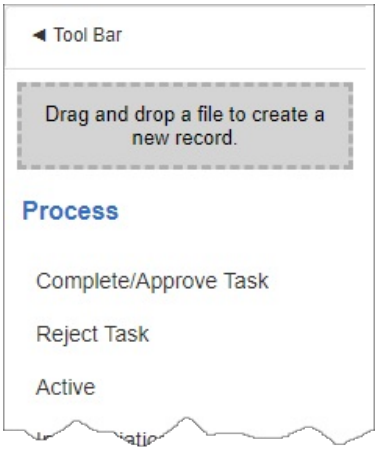
Acting Upon/Approving/Rejecting a Task

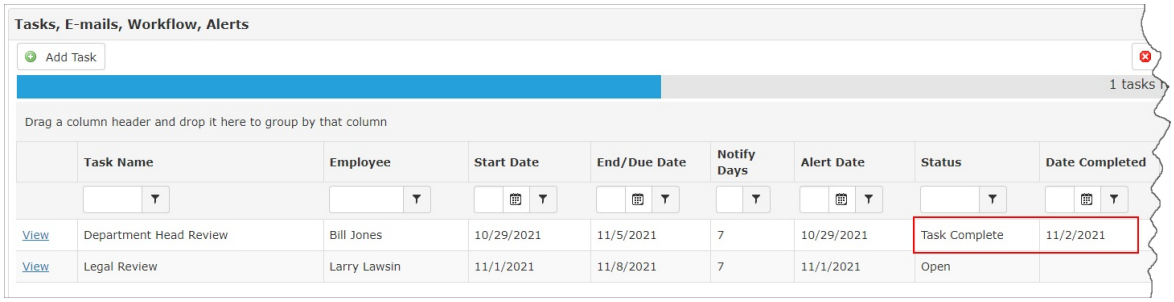
Contract Tasks: Act Upon a Task

To **Approve** (or **Complete**), **Reject**, or apply another status to a task, navigate to the **Task Details** screen and click **View** for the task line item. Before being acted upon, a task's status is Open.



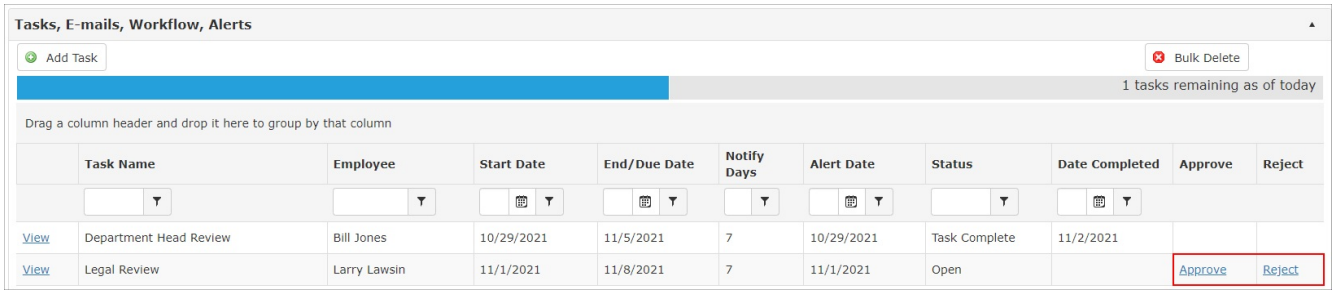
By clicking **the desired value** on the side menu of the **Task Details** page, the task's **Contract Details** list on the **Tasks, E-mails, Workflow, Alerts** displays. Notice the task's **Status** is now updated and is no longer listed as Open.



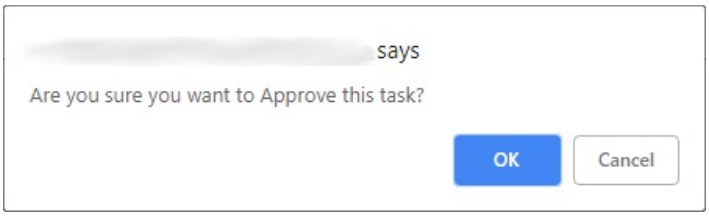


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Alternatively, if the system is configured to allow it, act upon a task by scrolling to the right and clicking the appropriate status update. Please note that the status values in your system may differ from those pictured here.

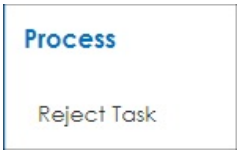


A popup window displays to confirm the selection.



By setting the Task's **Status** to **Task Complete**, e-mails for this task alert are disabled; no further alerts will be sent out. For more information about disabling Alerts for statuses, see the Task Status Management Wiki page.

Note: If configured to permit such a change, if the task is marked as **Complete** but needs to be changed, click **View** for that task line item. When brought to the **Task & Event Details** screen, click **Reject** on the side menu of the task details page. **Complete/Approve Task** will no longer be available as the task has already been completed.



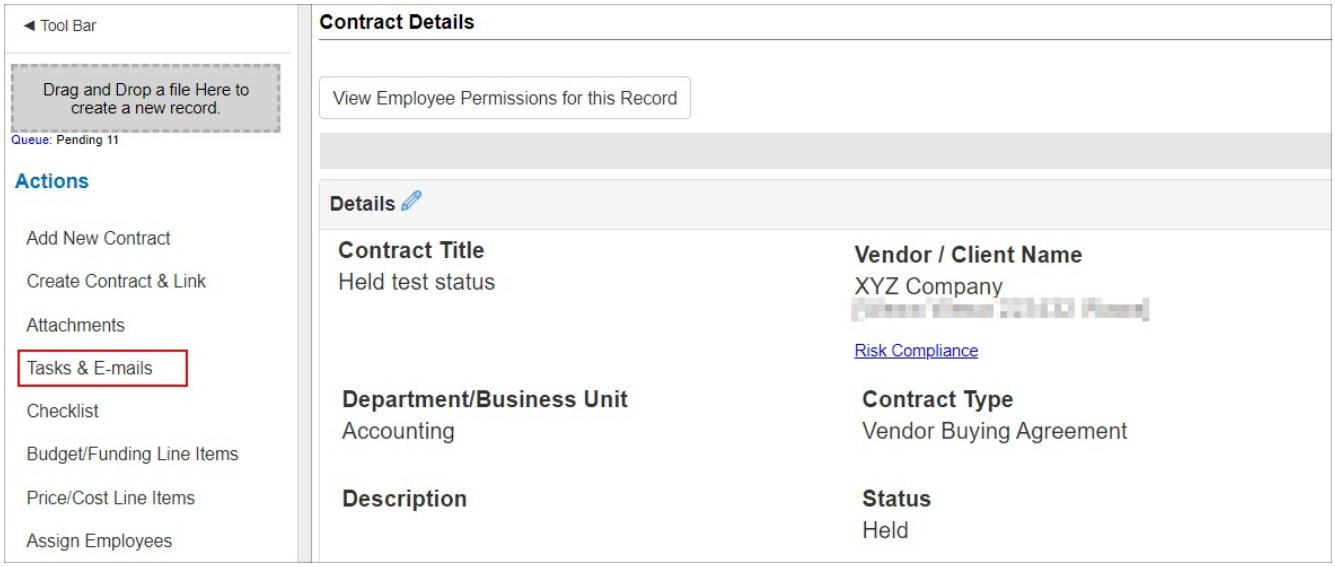
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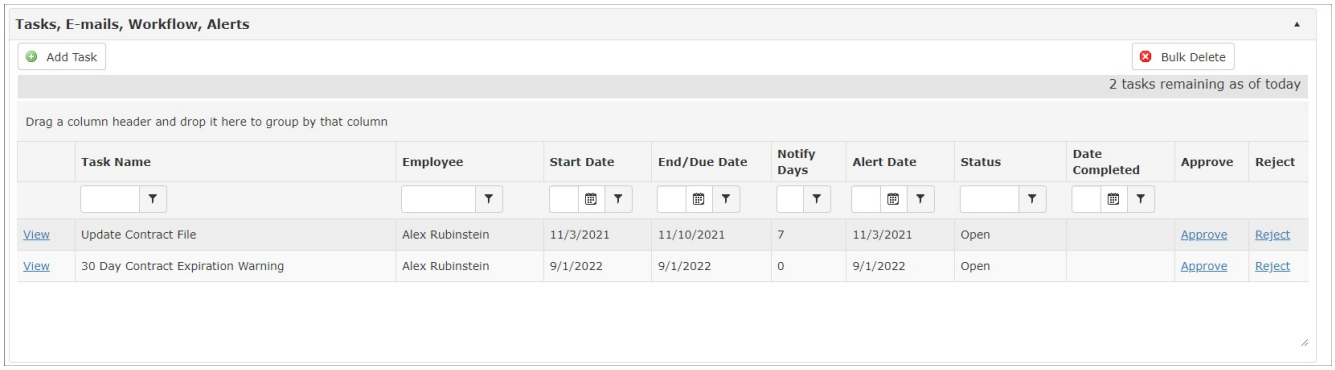
Contract Tasks Overview

Contract Tasks Overview

Contract Tasks: Overview

Access the contract tasks by either clicking **Tasks & E-mails** on the side menu of the **Contract Details** screen or by scrolling down the screen. Each goes to the same view.





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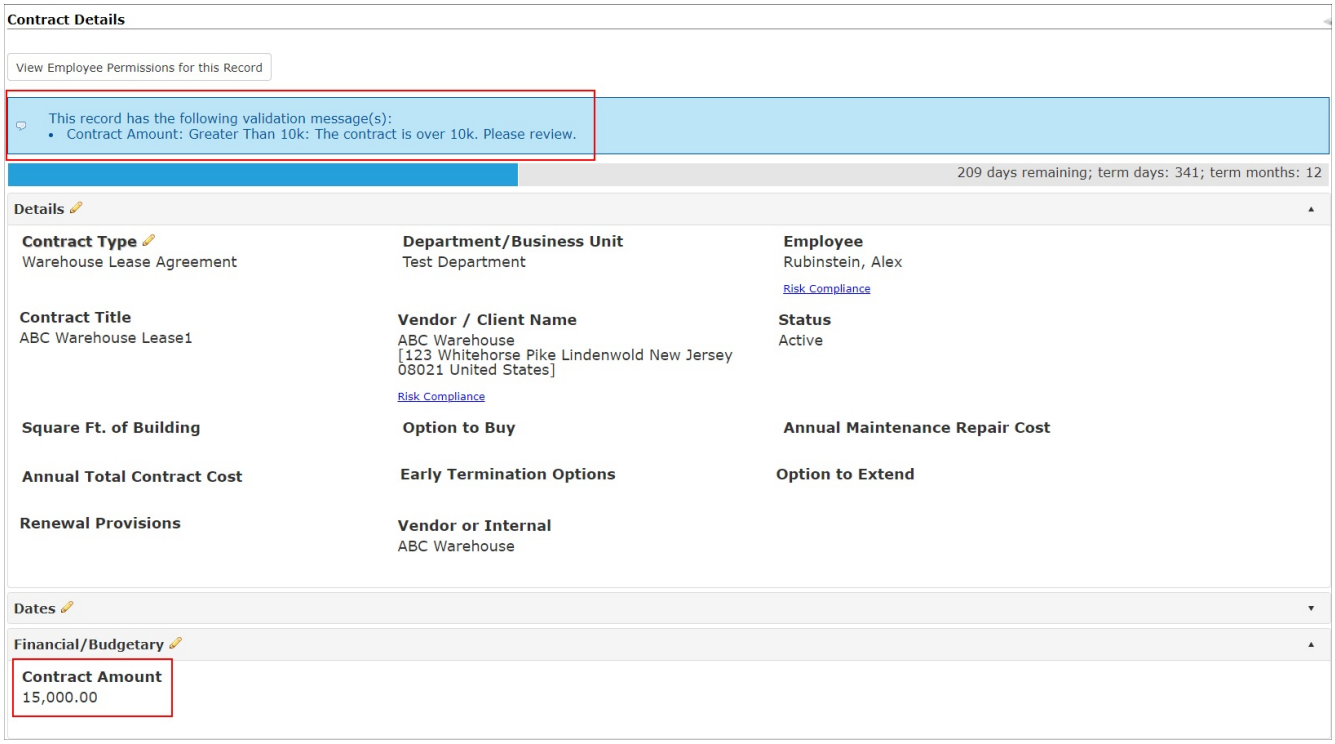
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On-Screen Validation Messages

On-Screen Validation Messages

On-Screen Validation Messages

Not all alerts are driven by tasks. If your organization has set Workflow to process Validation Messages based on conditions, alerts can be set to provide a text validation message on a record.



If a record meets previously established criteria, a validation message such as the one above can display. It operates as an alternative/addition to task alerts.

In the example above, for records with a Contract Amount of greater than $20 Million, the validation message in blue displays.

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Task Alerts on a Contract Record

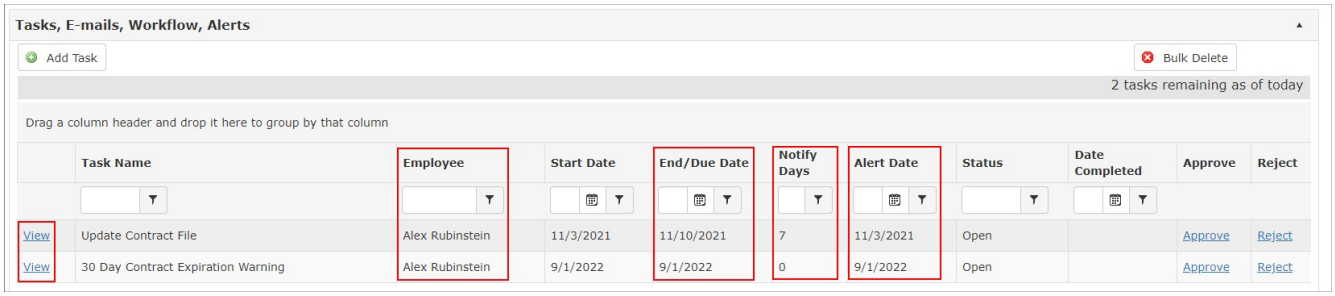
Task Alerts on a Contract Record

Contract Tasks: Alerts

CobbleStone allows users to add task alerts related to contract records using the **Tasks, E-mails, Workflow & Alerts** section of the respective **Contract Details** screen. **Contract Task Alerts** are sent to out to the **Employee Assigned to** for the **Task Record** (not the Employee assigned to the Contract Record).

If enabled by the System Administrator and supported by your email provider, an calendar placeholder will be sent to the **Employee Assigned To**'s email. Calendar placeholders are set based on the **Start Date** and **End/Due Date** of Task alerts, Contract End Date Alerts, and E-Sourcing Bid Close Date alerts.

Each of the items below are needed for construction of a task alert:



1. **Task End/Due Date:** The date on which the task is due for completion.

2. **Notify Days Date**: When the number of calendar days before the **Task End/Due Date** to determine on what date the user is notified of the task.

Example: A user enters a task **End Date** of 12/31/2019 and a **Notify Days** value of ninety (90):

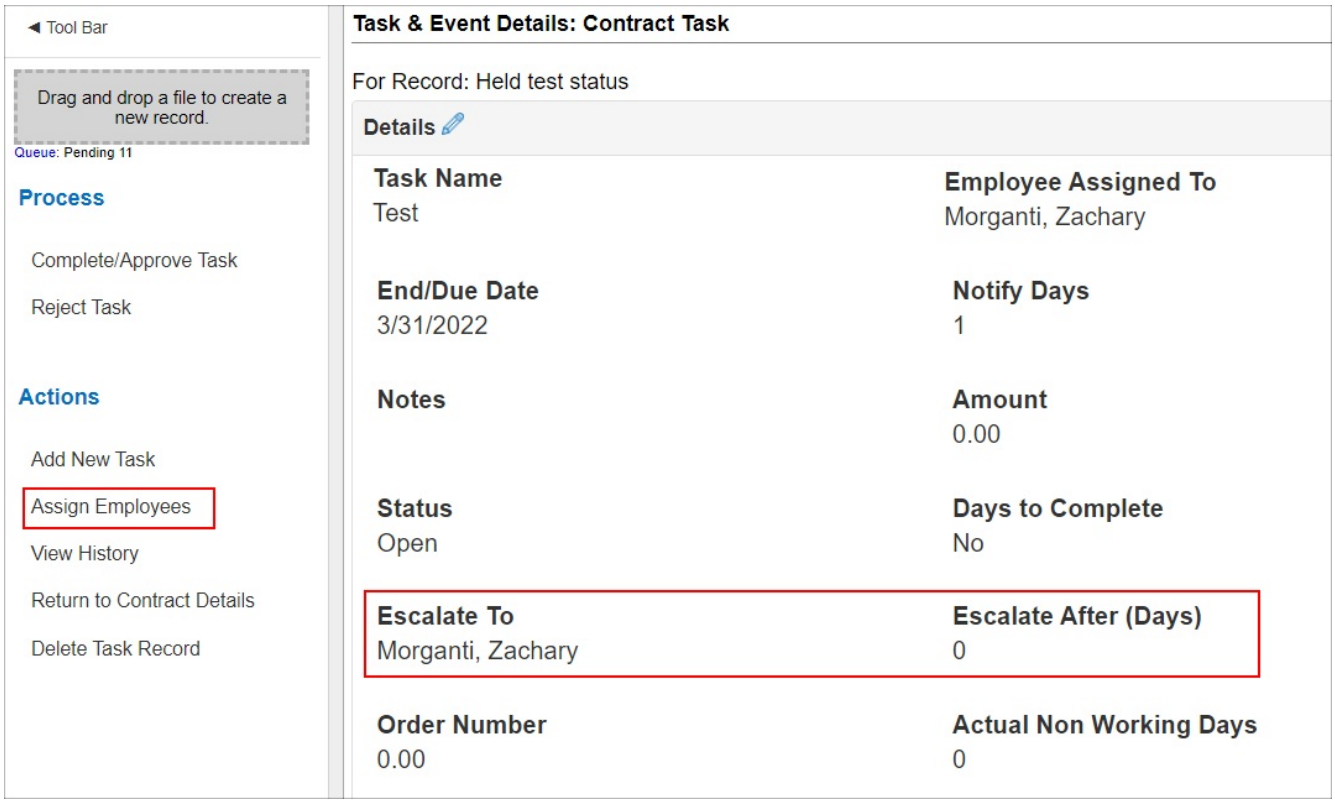
The system will automatically generate an e-mail alert and send it the Assigned To employee for the Task record on 10/2/2019 (12/31/2019 minus 90 days).

The system will also display the alert on the My Calendar screen for the Assigned To employee (of the task) on 12/31/2019 (Task End/Due Date) and 10/2/2019 (90 days before the Task End/Due Date).

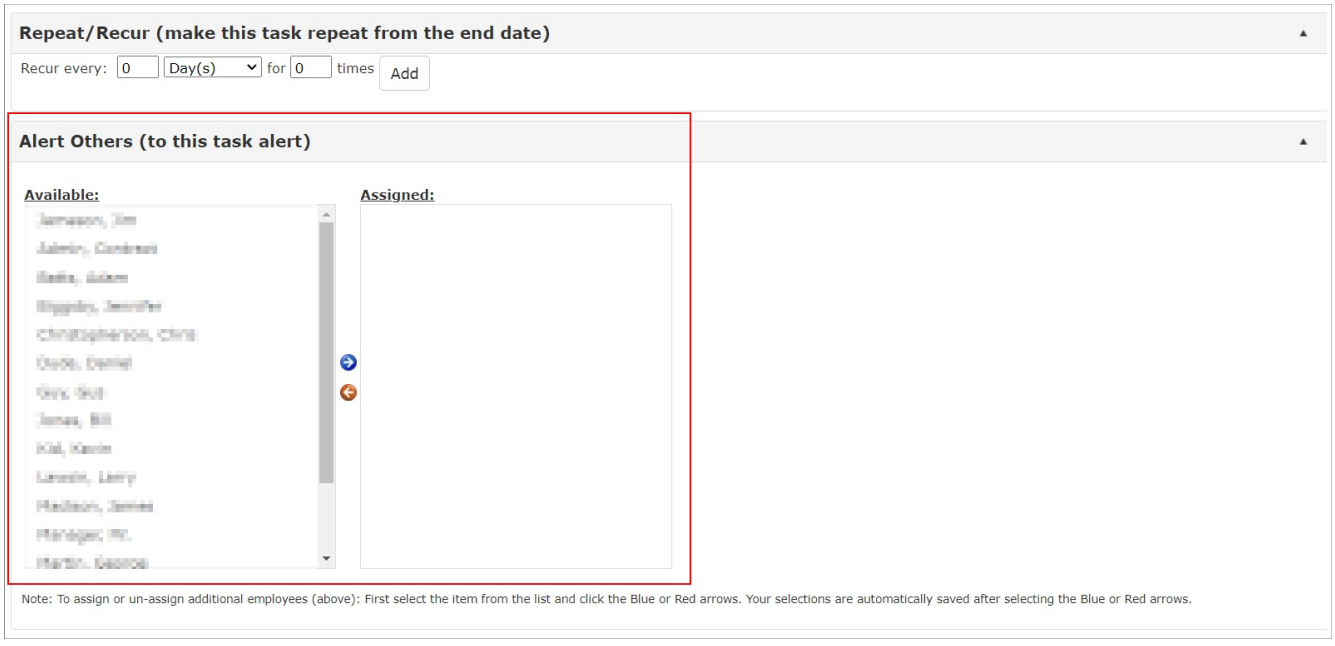
Notes:

- A user (with the proper permissions assigned) may add an unlimited number of tasks for a contract and assign the task to any employee entered into the Employee List.
- Contract Tasks may alert more than one employee.
- Contract Tasks can have an escalation specified (if needed) to alert a specified **Escalate To** employee if the Task is not either Completed/Approved or Cancelled/Rejected by the Task End/Due Date.

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- Contract Tasks can have an auto-repeat/recurrence specified on an interval.



Pre-defined Workflow may automatically assign tasks to a contract record as configured by an Application Administrator. The operations for the e-mail alerts and calendar alerts remain consistent with the instructions above, provided the Task Record has a valid **Assigned To** employee, **Task End/Due Date**, and **Notify Days** specified.

For the e-mails to be routed successfully, please have an Application Administrator verify the following:

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1. The employee's e-mail address is correct in the **Employee Manager Screen**.

2. The task end date and/or notify days (less than the task end date) is future dated.

3. Your organization's internal e-mail system is not blocking e-mails from the cobblestonesystems.com domain (or blocking emails from the internal server).

4. The **Task Email Job** is properly configured and scheduled to run at least daily (or better).

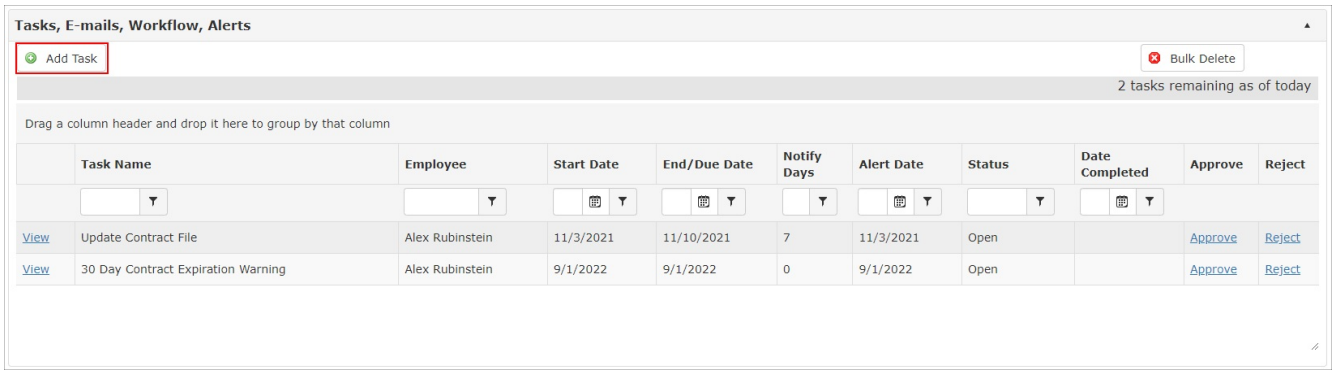
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Adding a "One-Off" Task

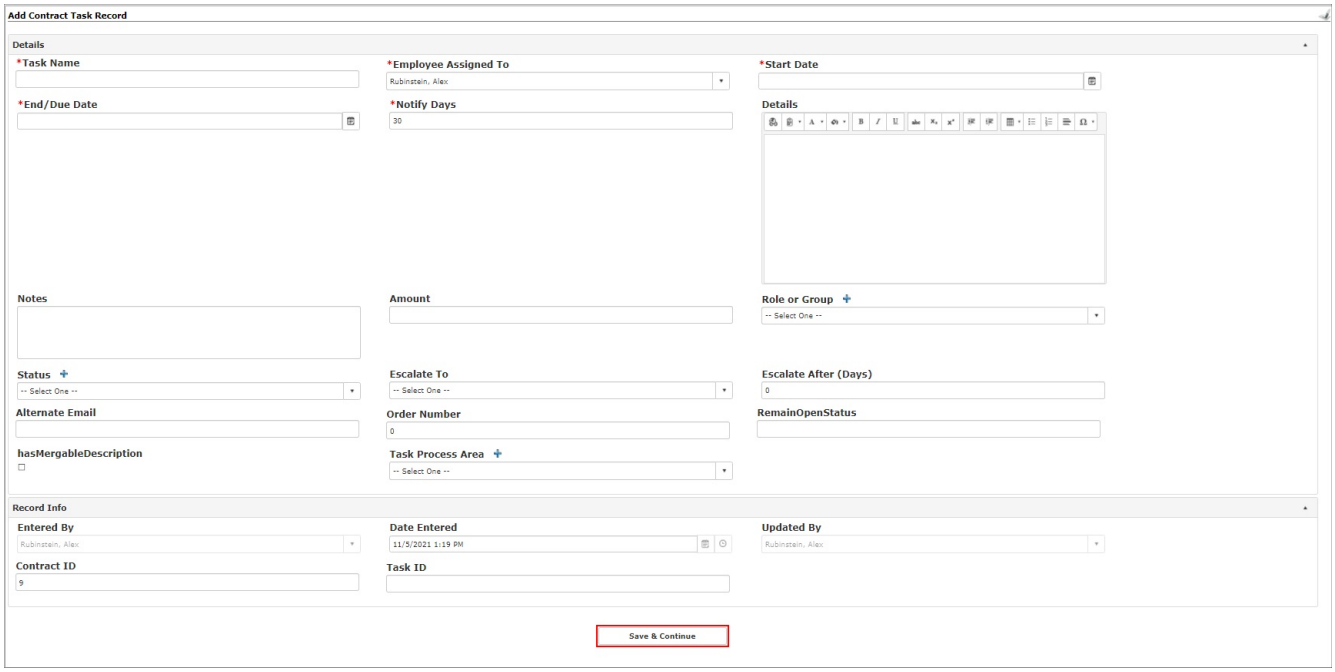
Adding a "One-Off" Task

Contract Tasks: Adding a "One-Off" Task

1. Select **Add Task** from the **Tasks, E-mails, Workflow, Alerts** menu on the **Contract Record Details** screen.



2. Enter the required information into the **Add Task** screen and select **Save & Continue**. Task creation can be cancelled by clicking **Return to Contract Details** on the side menu.



Adding a One-Off Task from the VISDOM add screen

One-Off tasks can be added directly to a new record when working with the following:

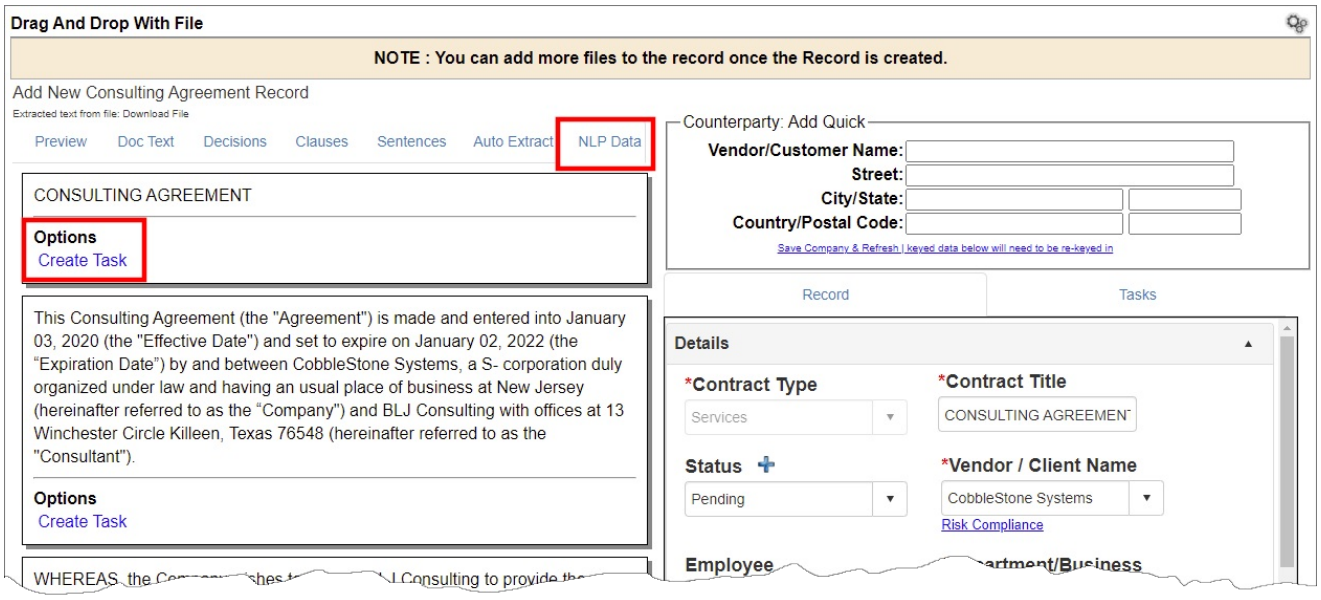
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A) A VISDOM add screen

B) Natural Language Processing

1. When those conditions are met, to add a task to a record on the add screen, click the NLP Data tab available for the record.

2. Click **Create Task**.



3. Enter the task data.

4. Save the task data.

Note: The tab on your record may be named differently than the one pictured above.

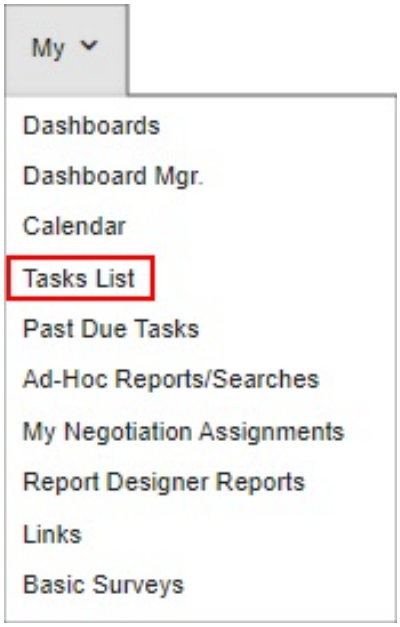
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My Tasks

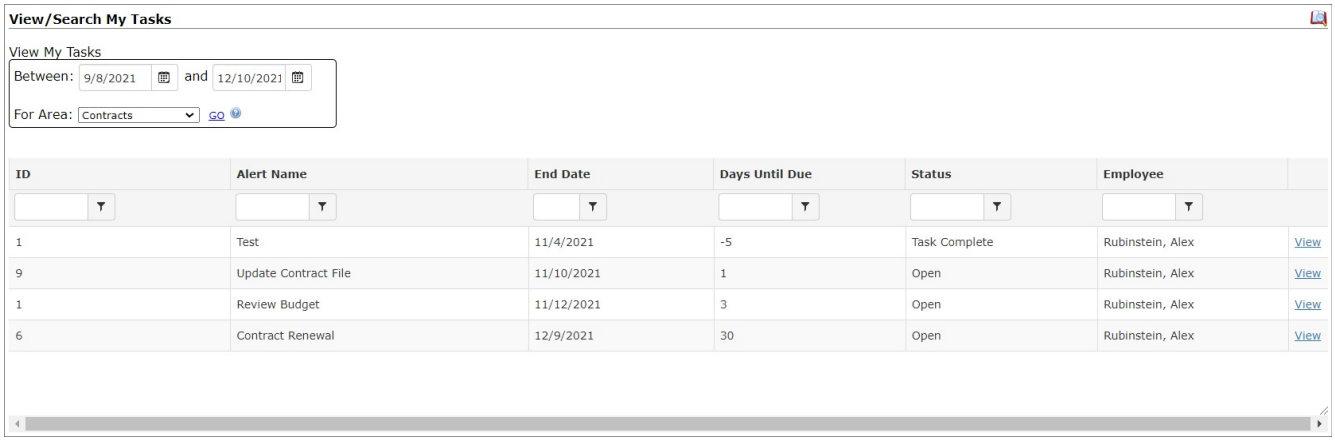
My Tasks

Contract Tasks: View My Tasks

CobbleStone enables users to view their assigned tasks quickly and easily by navigating to **My > Tasks List**.



Note: By default, the **Tasks List** page shows tasks only with an ending date in the current month.



ID	Alert Name	End Date	Days Until Due	Status	Employee	
1	Test	11/4/2021	-5	Task Complete	Rubinstein, Alex	View
9	Update Contract File	11/10/2021	1	Open	Rubinstein, Alex	View
1	Review Budget	11/12/2021	3	Open	Rubinstein, Alex	View
6	Contract Renewal	12/9/2021	30	Open	Rubinstein, Alex	View

From the **View/Search my Tasks** screen, the user can view all of their tasks that have been assigned to him or her, view an individual tasks details, and filter tasks.

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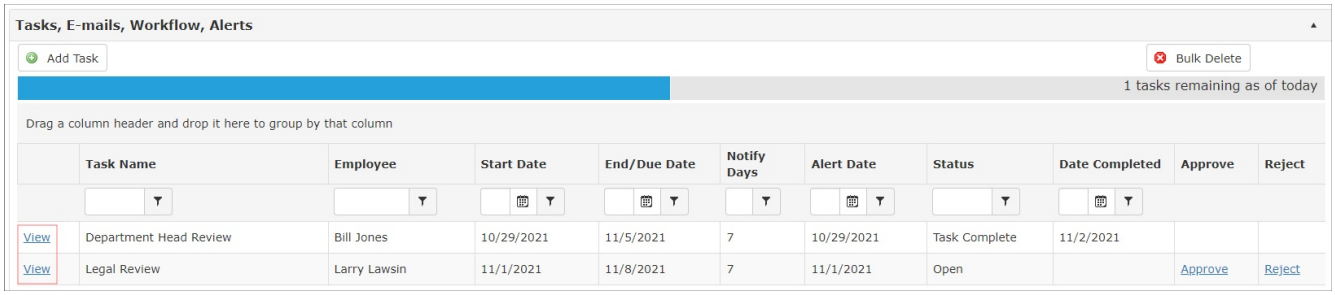
View a Task's Details:

1. Click **View** for the corresponding task that you would like to view.

2. This will take you to the **Contract Details** screen for the contract to which the task belongs.

3. Click **Tasks & Emails** button on the side menu or scroll down to the **Tasks, Emails, Workflow, Alerts** section of the **Contract Details** screen.

4. Click **View** for the task for which you would like to view the details.



5. To see more information about viewing and editing tasks, see the "Viewing & Editing a Task" Wiki page.

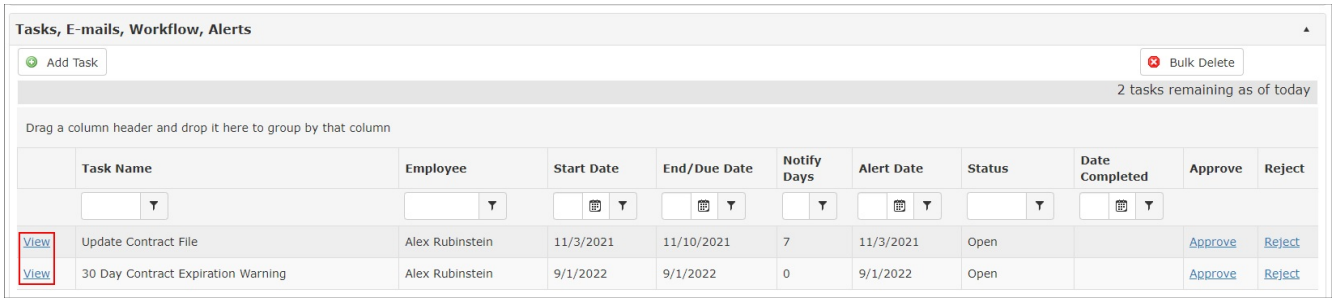
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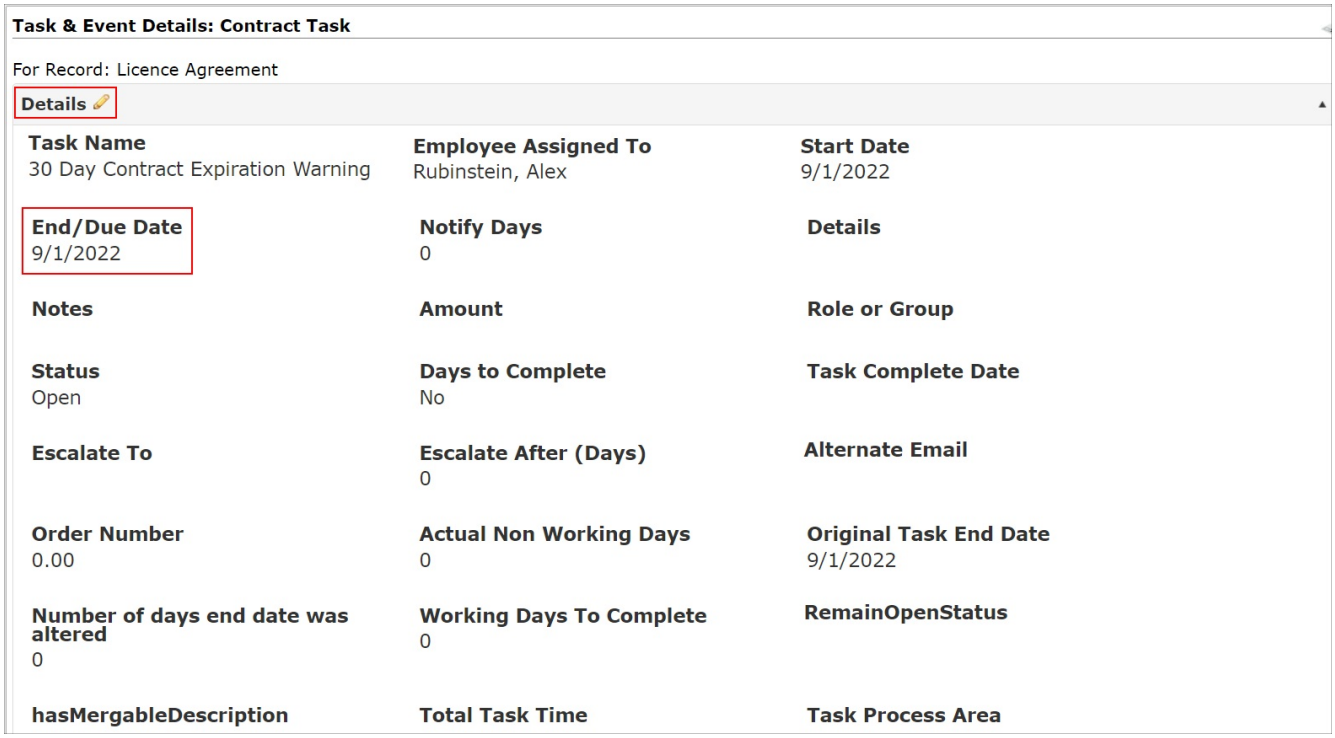
Viewing & Editing a Task

Viewing & Editing a Task

Contract Tasks: Viewing Task Details

Click **View** next to the task line item to view. The **Task and Event Details** screen displays.



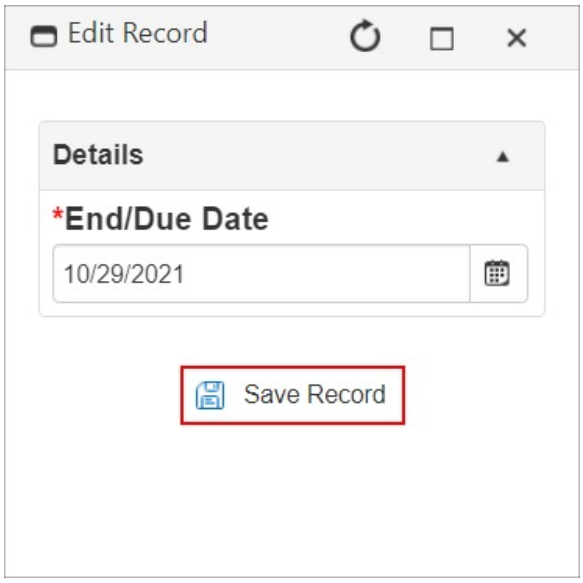


From this screen, users can edit details about the task, add a new task, mark this task as having been completed, set the task as a repeating/recurring task, and assign employees.

Editing a Task:

Edit a task's details by clicking the **Pencil icon** ( ) for the line item you wish to edit. After editing the detail, click **Save Record**.

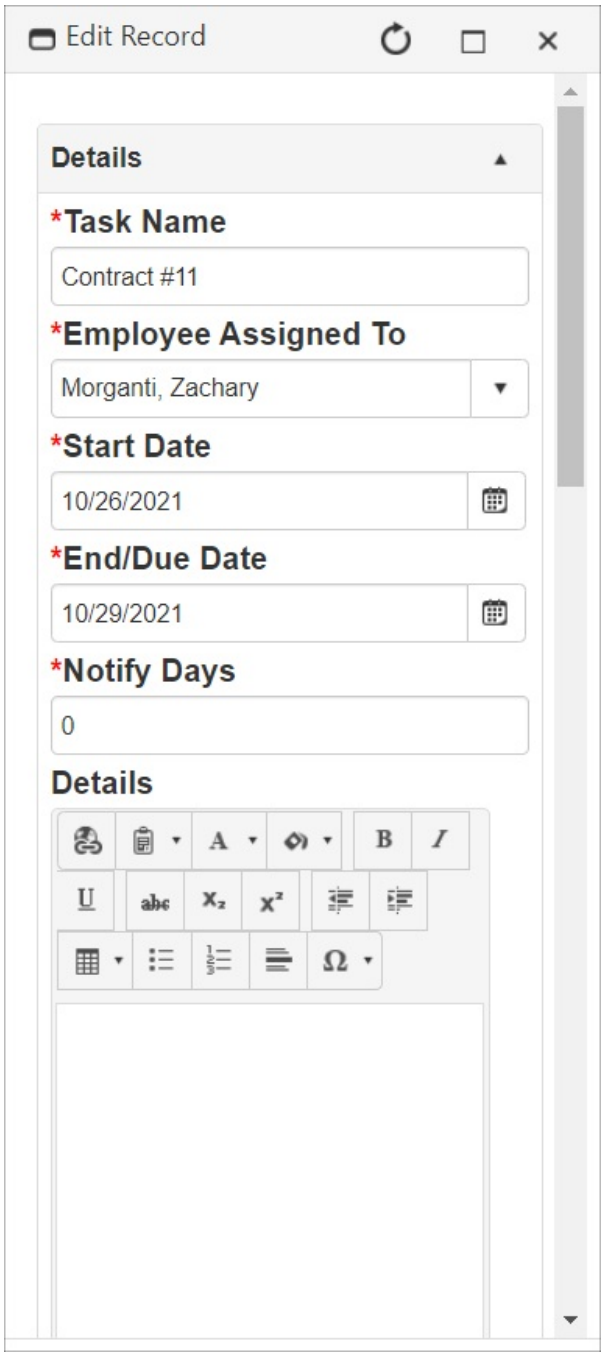
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Cancel the editing by clicking the **X** in the top right.

Click the **Pencil icon** ( ) next to the Field Group name (such as next to **Details** in the image below) to edit all the fields in that Field Group.

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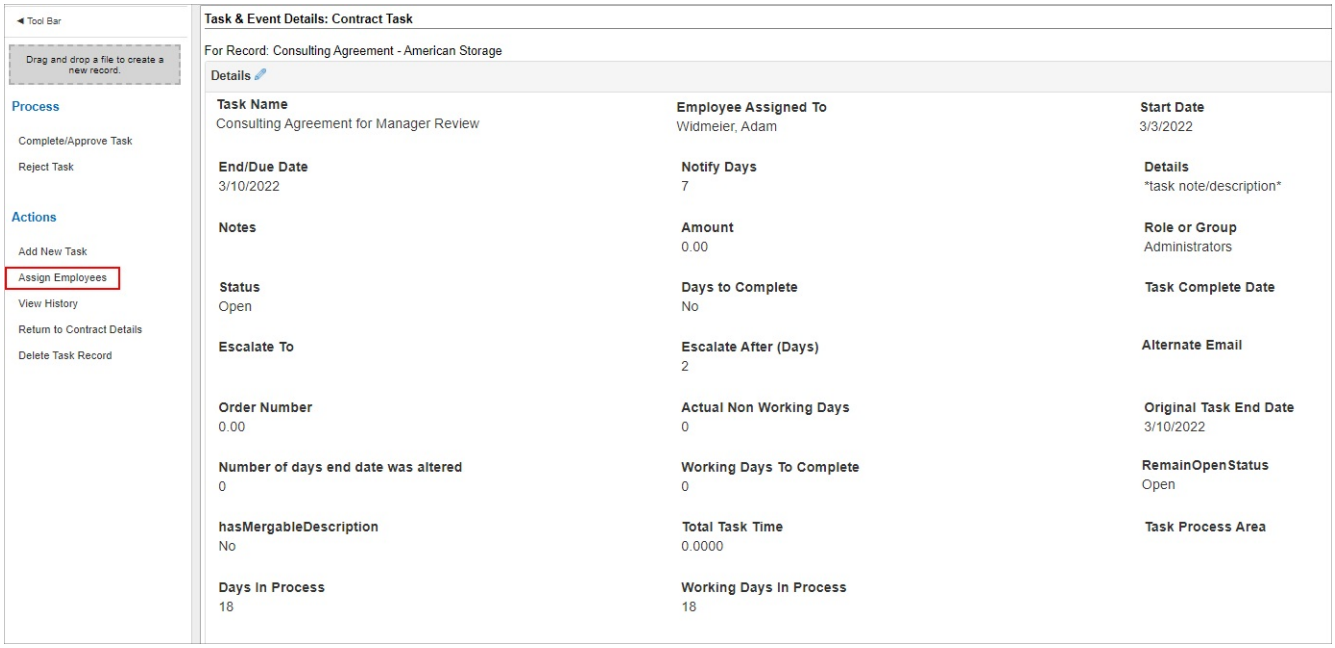
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Assign Additional Employees to a Task

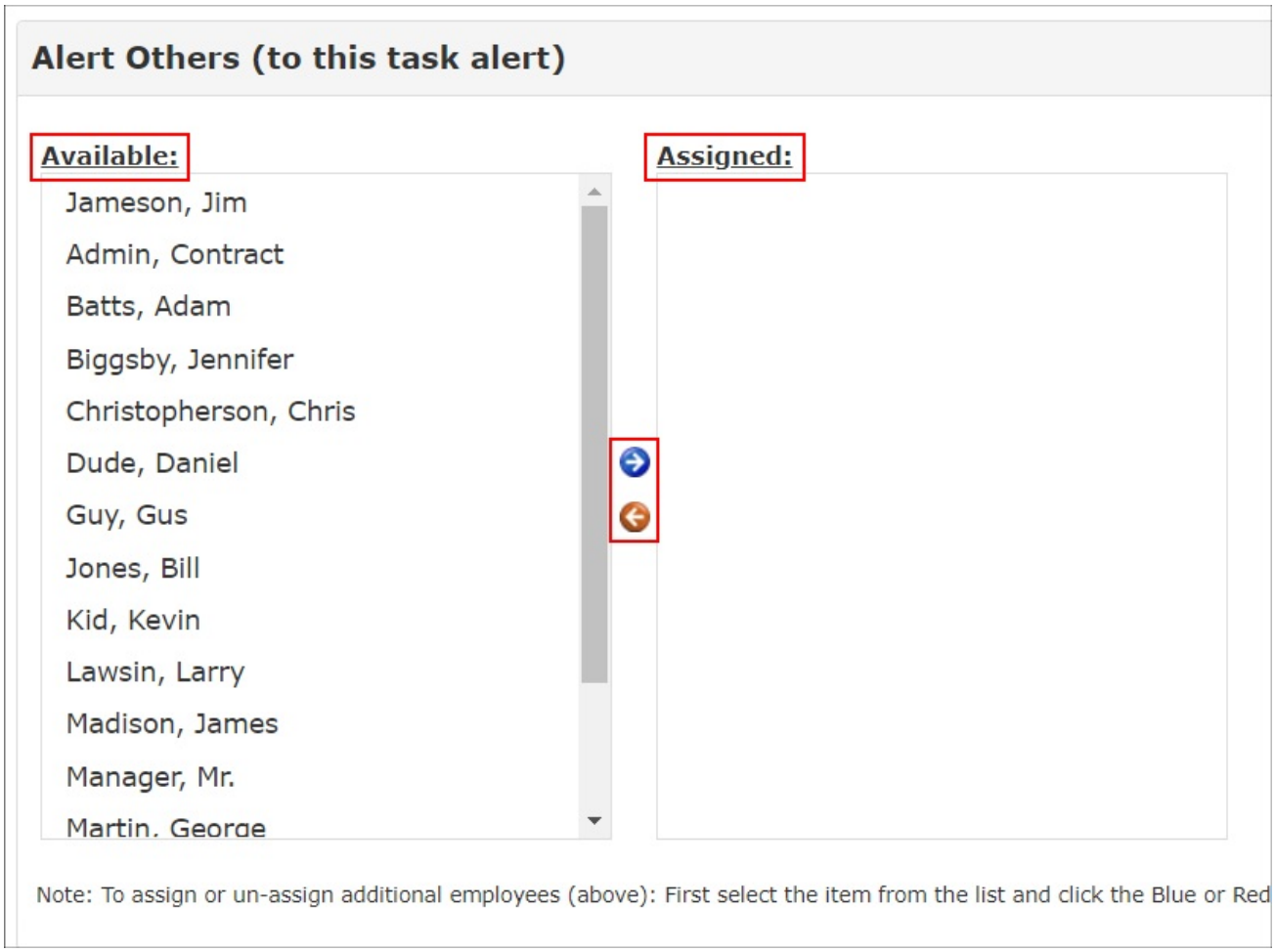
Assign Additional Employees to a Task

Contract Tasks: Assign Additional Employees

Assign or remove employees for a task by scrolling down to the **Alert Others** section or by clicking **Assign Employees** on the side menu.



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Note: Using the **Task Event Details** page to assign employees will assign employees to the task. To assign employees to the **Contract**, click **Assign Employees** on the **Contract Details** side menu (see the Assign Employees to a Contract Wiki page).

Assign an Employee: In the **Available Employees** box, highlight the name of the employee to be to assigned to the task and click the **Blue Left Arrow**.

Remove an Employee: in the **Assigned Employees** box, highlight the name of the employee to be removed from the task and click the **Red Right Arrow**.

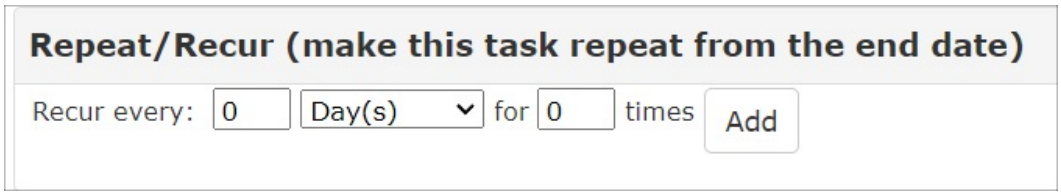
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Repeating/Recurring Tasks

Repeating/Recurring Tasks

Contract Tasks: Repeating/Recurring

If task is to repeat or to recur on a schedule, it can be set on the **Task & Event Details** screen. In the **Repeat/Recur** area, enter the number of the selected recurrence period and enter the number of times for the task to recur. Click **Add.**



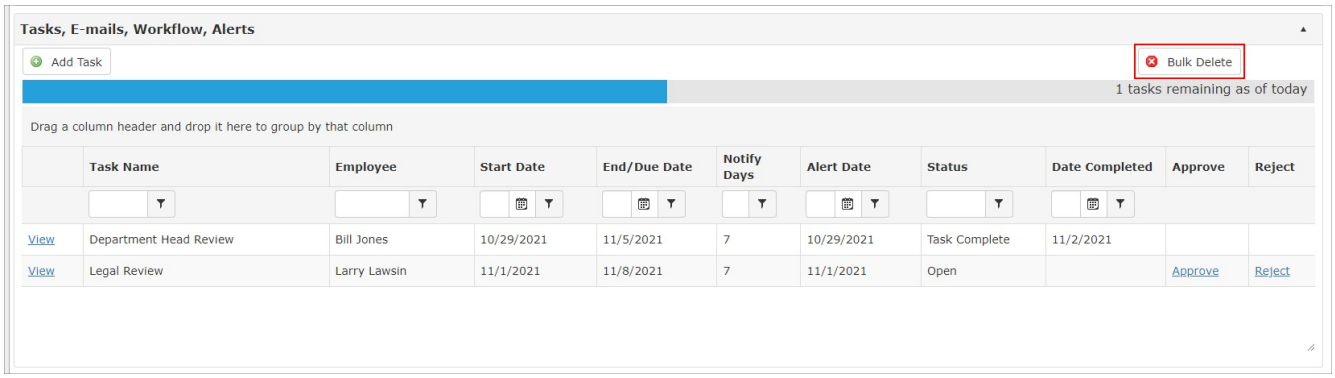
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Deleting Tasks: Bulk Delete

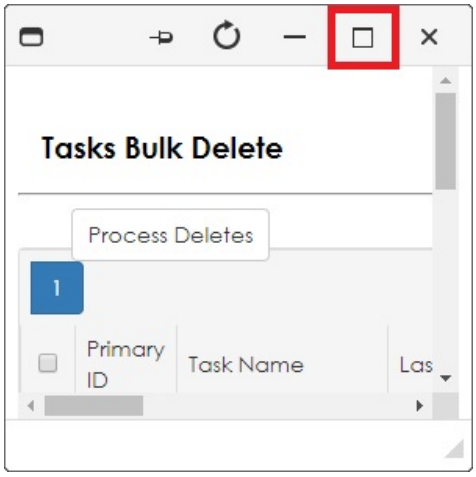
Deleting Tasks: Bulk Delete

Bulk Delete Contract Tasks

Contract Tasks can be deleted in bulk using the **Bulk Delete** button.

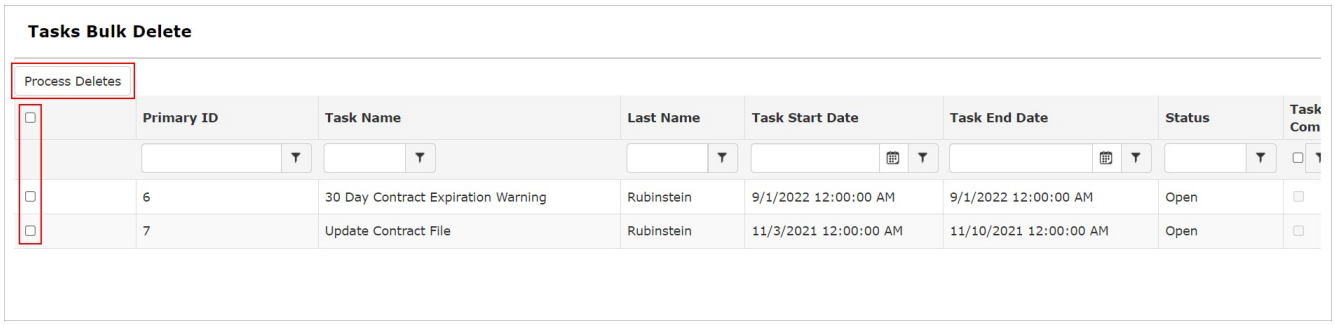


The pop-up module may open too small, so we recommend clicking the **Expand/Maximize** icon.



Dependent upon permissions, users can mark the tick box for individual Tasks, or mark the top left tick box to select all Tasks. Once you've got the unwanted Tasks selected, click **Process Deletes**. Please note that this is an irreversible action; users should be certain the selected tasks are to be deleted before clicking **Process Deletes**.

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Contract Request Process Overview & Planning

Contract Request Process Overview & Planning

Contract Request Process: Overview

Contract Insight Enterprise Edition contains a feature called **Contract Requests**, which allows users of the Contract Insight application to login and create a request for a new contract. In the request for the new Contract, the user is able to enter any supporting information about the new potential contract and attach any supporting documents or files for the **Contract Request**.

Once a Contract Request is created by a user, a specified **Review Group** of users in the organization are then alerted (via Email) that there is a new Contract Request, prompting the Reviewers to login to Contract Insight and review the new request.

Once the Reviewers have reviewed the Contract Request, they can then either **Reject** the Contract Request, which would alert (via Email) the Requester that the request was denied, or **Accept** the request, at which time the Reviewer could then create a Contract Record directly from the Contract Request screen.

Planning for Use of Contract Requests

1. Plan any fields to add to the **Contract Request** screen in order to collect as much information about the new requested contract as possible.

2. For any **Contract Request** screen fields, plan which fields on the Contract Request screen would map to which fields on the Contract Details screen (this is used when creating a Contract Record from an **Accepted Contract Request)**.

3. Plan which Employees should be included in the **Review Group** for Contract Requests.

Note: You may create as many Employee Groups/Roles as needed, such as Departmental **Review Groups** for Contract Requests if there is a different group of Employees/Administrators who need to be alerted for Contract Requests depending on the Requesting Department.

4. Plan which users of the Contract Insight application should be allowed to **submit**, **view**, and/or **manage** any Contract Requests.

Configuration Steps for Setting Up Contract Requests

Enter any/all fields to the Contract Request table via the **Field Manager**.

Enter any/all field mappings via the **Field Mapper** to specify which Contract Request screen fields will be carried over to which Contract Record screen fields when an **Accepted** Contract Request is used to create a new Contract Record.

Create an **Employee Group/Role** (via **Employee List** > **Groups/Roles** on the side menu) for the users that will be responsible for receiving notice of and reviewing any submitted Contract Requests.

Assign the proper **Contract Request permissions** to any users who should be allowed to **submit**, **view**, and/or **manage** any Contract Requests.

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Contract Request Process

1. User logs into Contract Insight and creates a **Contract Request**.
2. Any users assigned to the selected **Review Group** (which is selected when the Contract Request is created) receive an e-mail alert that a new Contract Request has been submitted.
3. Members of the assigned **Review Group** need to log in to Contract Insight and review the new Contract Request.
4. Once the Contract Request has been thoroughly reviewed, a member of the Review Group needs to update the **status** of the Contract Request to either Request Rejected or Request Accepted.
5. The Requester of the Contract Request receives an e-mail alert of the status change for the Contract Request to inform them if the request was accepted or rejected.
6. For **Accepted** Contract Requests, the appropriate individual (usually a member of the Review Group) then clicks the link (on the Contract Request Details screen) to **Create Contract** from the accepted Contract Request.
7. The **Add New** screen for Contract Records opens with the fields specified in the **Field Mapper** already populated with the appropriate values from the Contract Request fields. Any additional necessary/required information is then added to the **Add New** screen.
8. Click **Save & Continue** to save the new Contract Record and proceed to the **Contract Details** screen.

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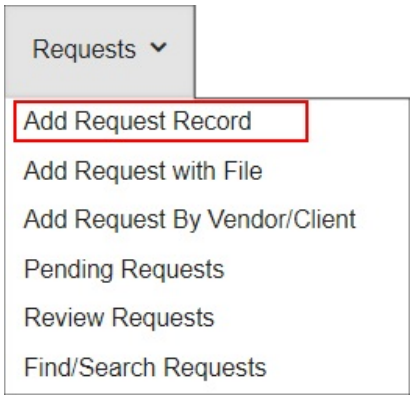
Create a Contract Request

Create a Contract Request

Contract Request Process: Create a Request

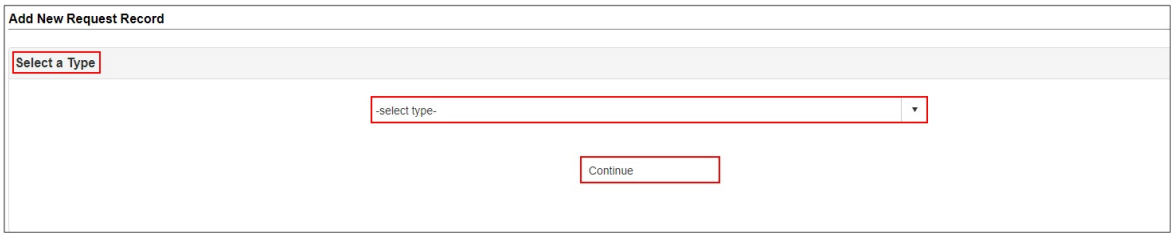
Adding a Request Record

Initiating the Contract Request Function is accomplished by navigating to **Requests** > **Add Request Record**.



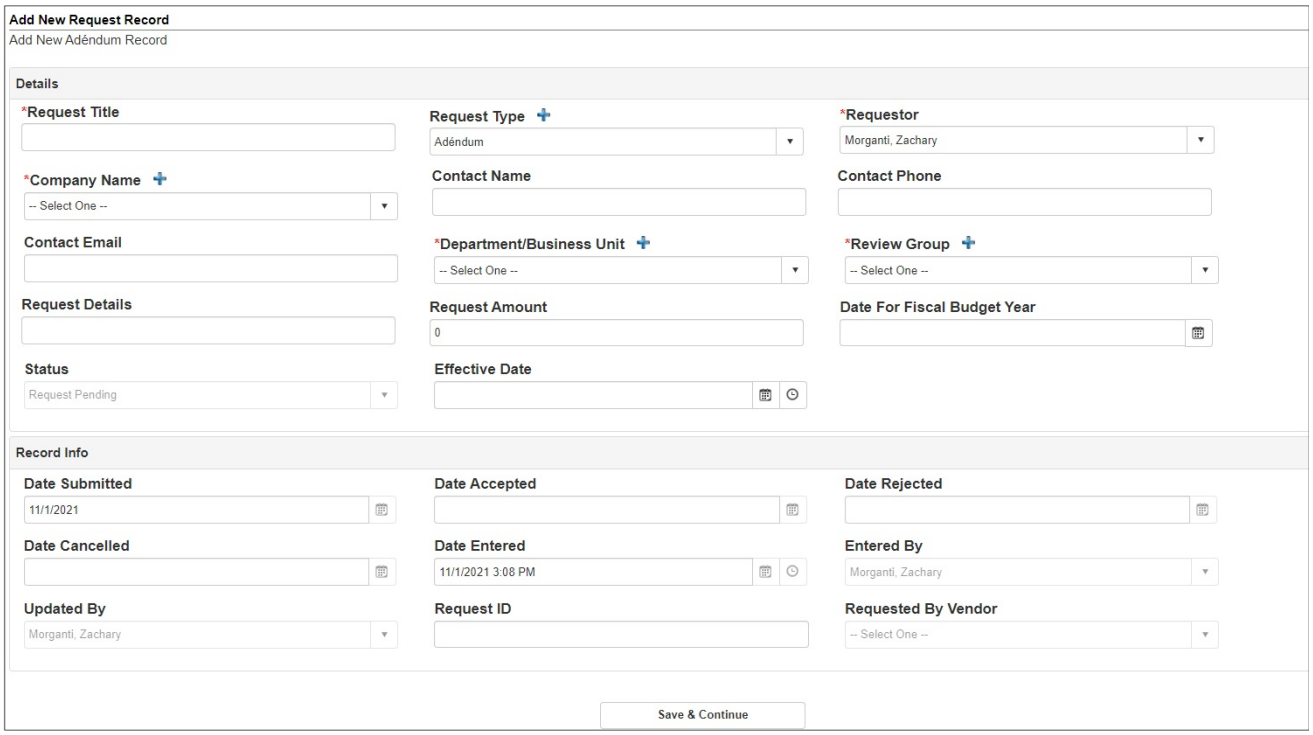
1. A page where the type must be selected in a drop-down menu displays

2. Click **Continue**.



The **Request a Contract** entry screen for adding/creating a new Contract Request displays.

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1. Enter the information/data for your Contract Request into the appropriate fields, being sure to populate all **required fields**, as indicated by a **Red Asterisk** (*).

Note:

1. Fields on the **Request a Contract** screen that are grayed out are fields that the system automatically populates/fills in and cannot be changed/edited.
2. Each Contract Request must be assigned to an appropriate **Review Group**. The assigned **Review Group** is comprised of individual users who have been tasked with reviewing and determining the disposition for each submitted Contract Request. Creation and management of **Review Groups** is a Contract Insight Application Administrator function which should be completed during **Contract Request Configuration**. To create a **Review Group**, please see the Employee Groups & Roles Wiki page.
3. When creating a Contract Request for review and acceptance, the value in the **Status** field triggers the Contract Request to be submitted, to the individual users assigned to the **Review Group**, for the review and acceptance activities. A Status value of **Request Pending** triggers alert emails once **Save & Continue** for the Contract Request has been clicked. Contract Request Email Alerts are sent to all individual users assigned to the assigned **Review Group**, the requester (**Entered By**), and the **Employee Contact** (primary person assigned responsibility as the point of contact for the Contract Request).

2. Add Sub-Table Data

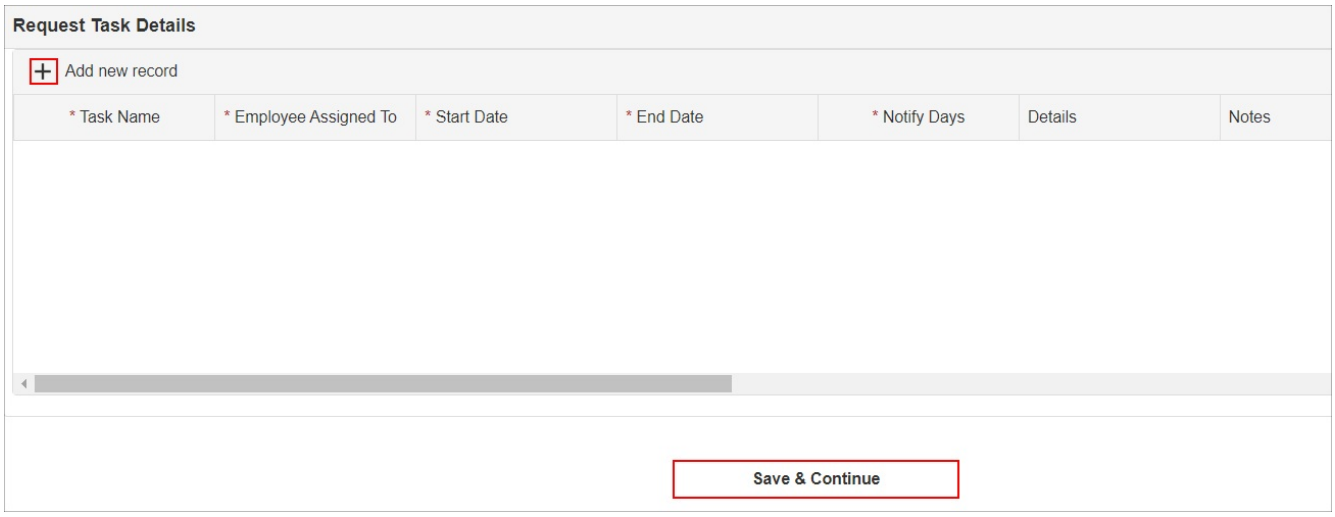
If configured to, some sub-tables may be available to data entry on the record's Add Screen.

Adding Sub-Table Lines on the Record Add Screen

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A. Add a new record as usual.

B. Between the individual fields and the Save & Continue button, each selected sub-table is available. If a particular sub-table is not available, your system administrator has not enabled it for use on the add screen.



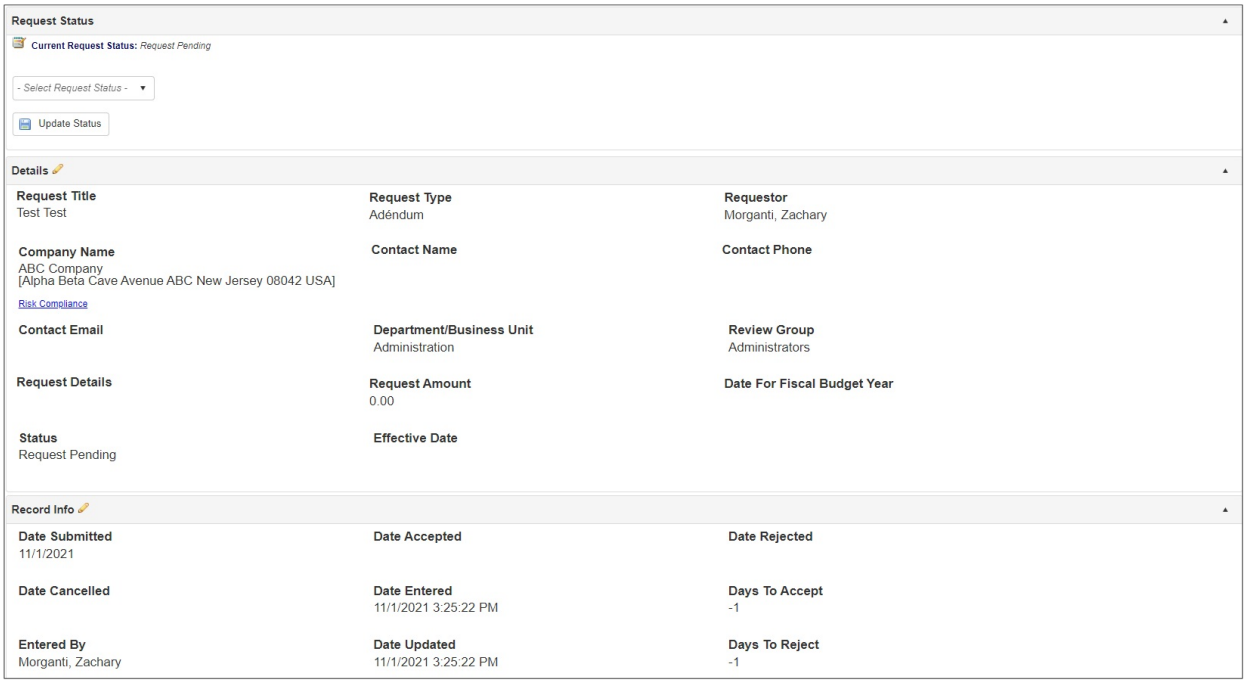
C. Click Add New Record.

D. A set of fields appears for each column header for each sub-table. Enter data into all required fields (as marked with a red asterisk (*) in the column header) and all other data available.

Note: For more information regarding sub-tables, please visit the wiki page for Custom Sub-Tables.

2. Once all of the appropriate data/information has been entered, click **Save & Continue** to save the Contract Request, trigger the alert emails. The **Contract Request Details** screen displays.

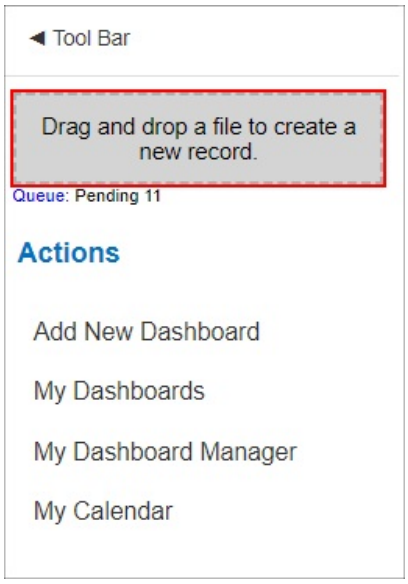
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The **Request Details** screen contains 6 distinct sections/components:

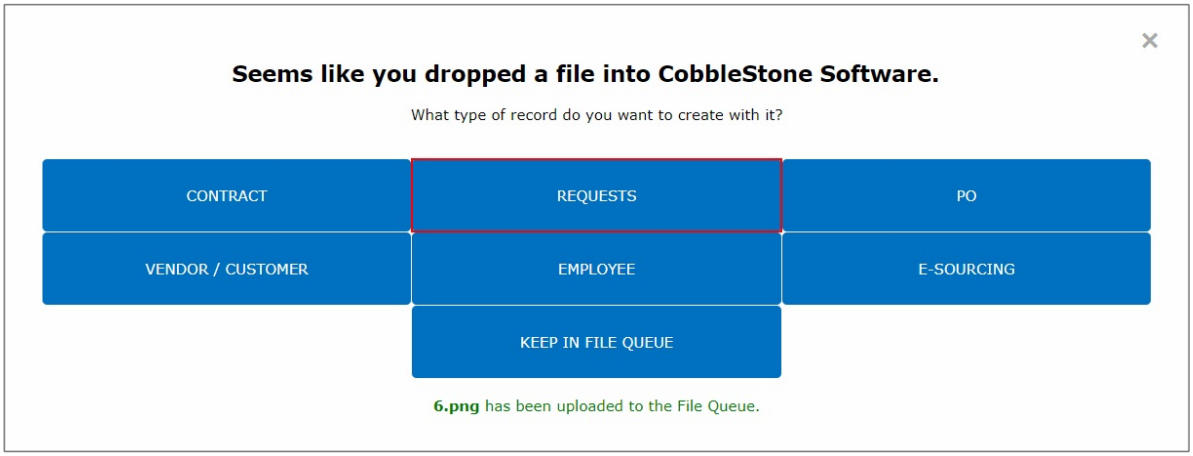
1. Contract Request Meta-data (**Record Details**)
2. Contract Request Attachments (**Files & Documents**)
3. Contract Request Task Alerts (**Tasks, E-mails, Workflow, Alerts**)
4. Contract Request Line Items (**Line Items**)
5. Contract Request Notes Repository (**File Notes & Comments**)
6. Contracts Linked to this Request

You are also able to create a request from a file from any screen with the grey Drag and Drop box in the side menu by dragging and dropping a file onto that screen



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That will then prompt you to choose what type of record to create from the file. To create a request, you would need to click on the request button.



Afterwards you will be able to review the file and enter all metadata for the record.

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Reviewing Contract Requests

Reviewing Contract Requests

Contract Request Process: Reviewing Requests

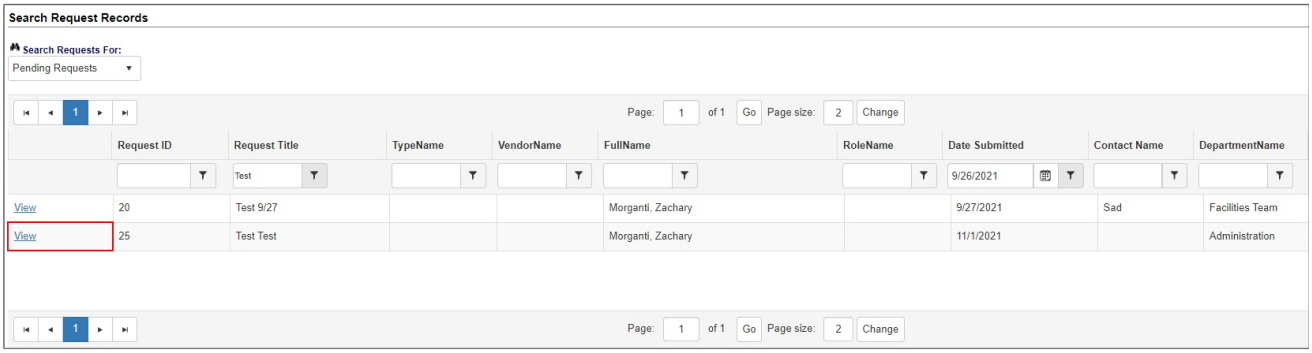
Contract Insight allows Application Administrators to assign employees to a **Group/Role** for reviewing contract requests. An Application Administrator can assign a particular Group/Role for reviewing contract requests. Employees can then be assigned to the group/role (please see the Employee Groups & Roles Wiki page for more detailed instructions on how to create and manage Employee Groups and Roles).

1. If a user has been assigned to a **Review Group** and given permissions to **Edit/Manage Requests**, they will receive email notifications of newly submitted Contract Requests whenever the **Review Group** to which that user belongs has been selected upon the creation of a request. Reviewers can access the contract requests by navigating to **Requests** > **Review Requests**.



2. The **Contract Request Review** screen displays where are able to select the following to be displayed:

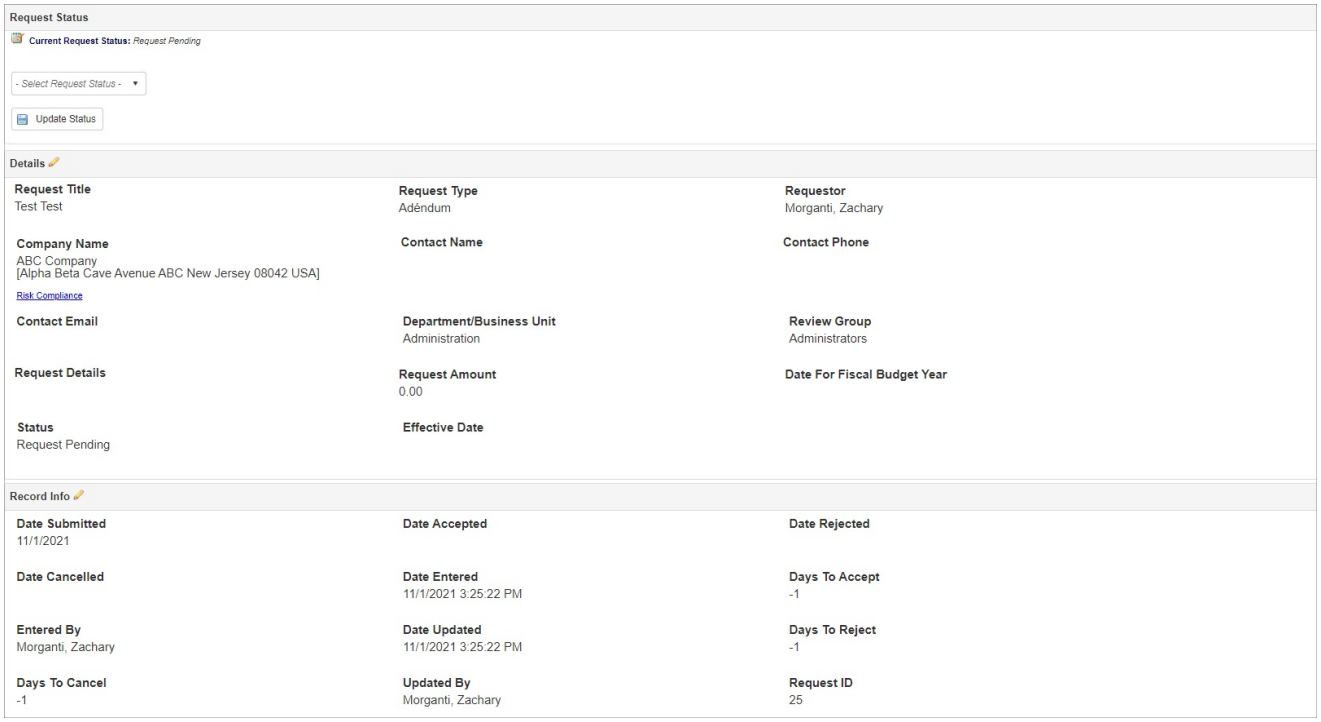
- **View Requests By:** where you can select if you would like to display My Requests, requests that have been assigned to you; My Dept. Contract Requests, requests that have been assigned to your Department; or All Contract Requests.
- **Search Requests For:** where you can select a Contract Request Status by which to filter the view.



3. When the **Contract Requests Review** screen displays, click **View** for the contract request line item needed.

4. The **Contract Request Details** screen displays where the reviewer can view the details of the request as well as change the **Status** of the request.

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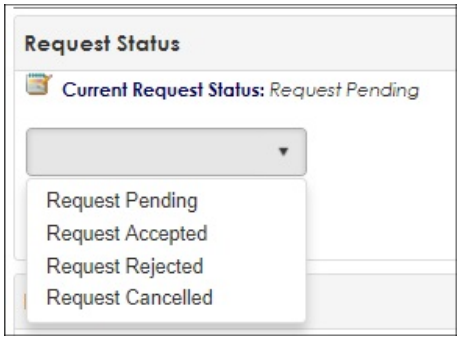
Accepting/Rejecting a Contract Request

Accepting/Rejecting a Contract Request

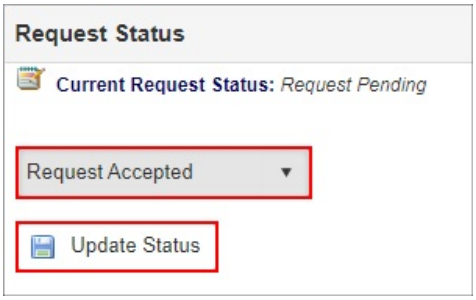
Contract Request Process: Accepting/Rejecting a Request

Once the Contract Request has been reviewed by a member of the assigned Review Group, the Reviewer will then need to change the **Status** of the Contract Request.

To change the **Status** of a Contract Request, the Reviewer must go to the **Contract Request Details** screen. From there, the status can be changed using the **Request Status** drop-down menu.



Once the new status has been selected, click **Update Status**.



Note: If a **Request Status** is set to Request Rejected or Request Cancelled, the user who submitted the Contract Request will be notified via e-mail.

If a **Request Status** has been updated to **Request Accepted**, the screen refreshes to show a new link for **Create Contract**. Please see the Create a Contract from a Contract Request Wiki page for information about creating a Contract Record from an accepted Contract Request.

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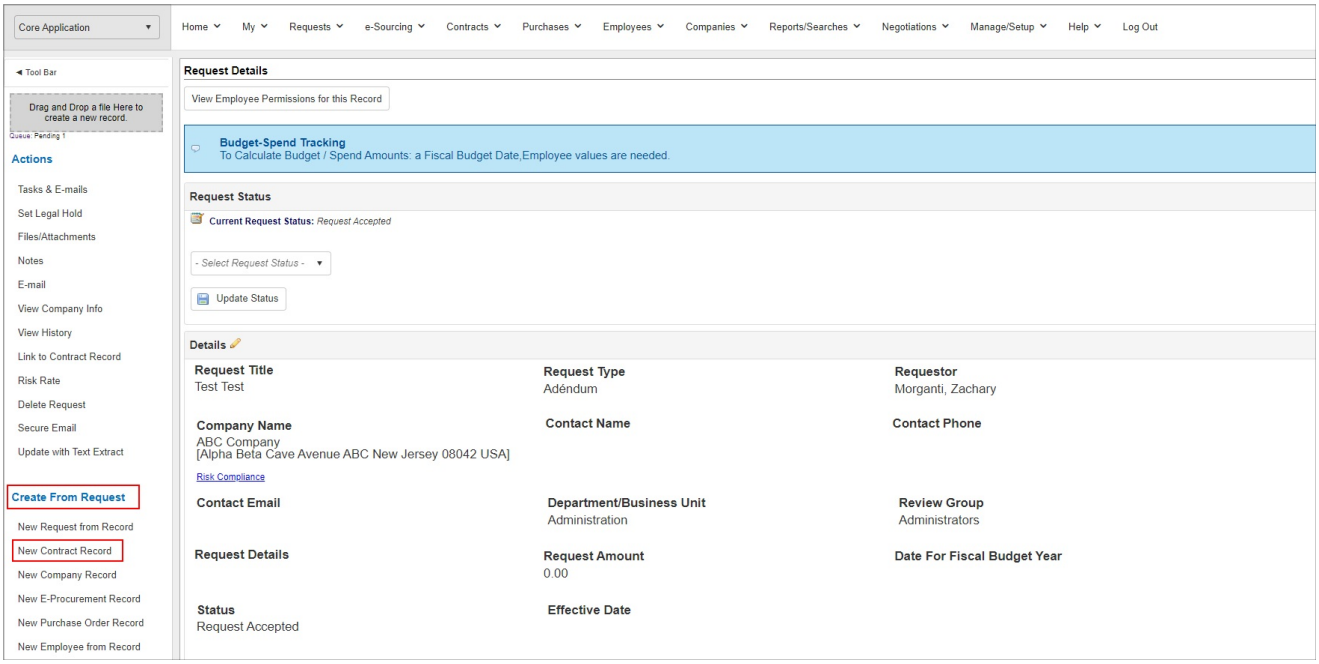
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Create a Contract from a Contract Request

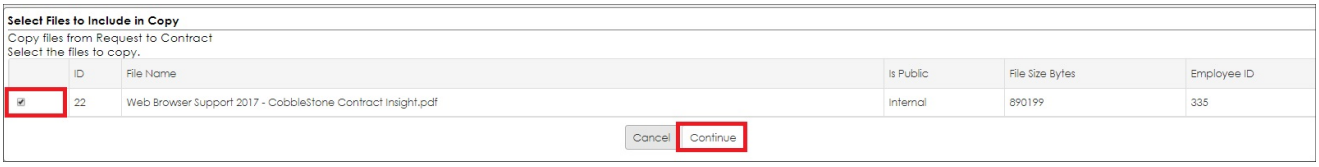
Create a Contract from a Contract Request

Contract Request Process: Create a Contract Record from a Request

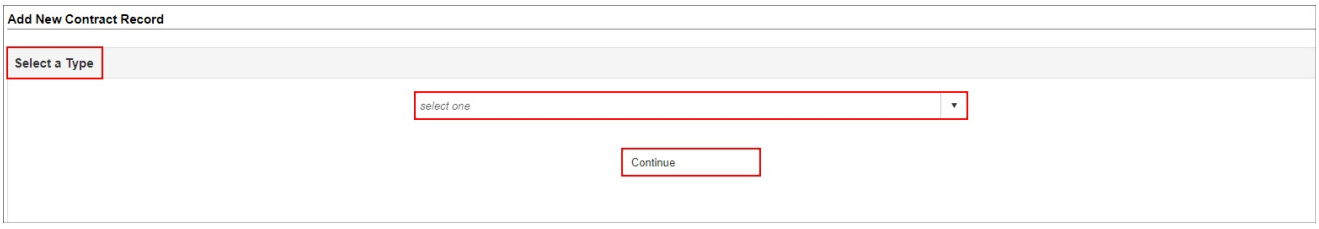
Once a Contract Request's Status has been updated to **Request Accepted**, a new option becomes available on the **Contract Request Details** screen: **New Contract Record**.



Click **New Contract Record** on the side menu is clicked, the **Select Files to Include in Copy** page displays. Select which files to copy from the request to the contract by clicking the check box to copy over to the Contract Record for the needed line item. Click **Continue**.

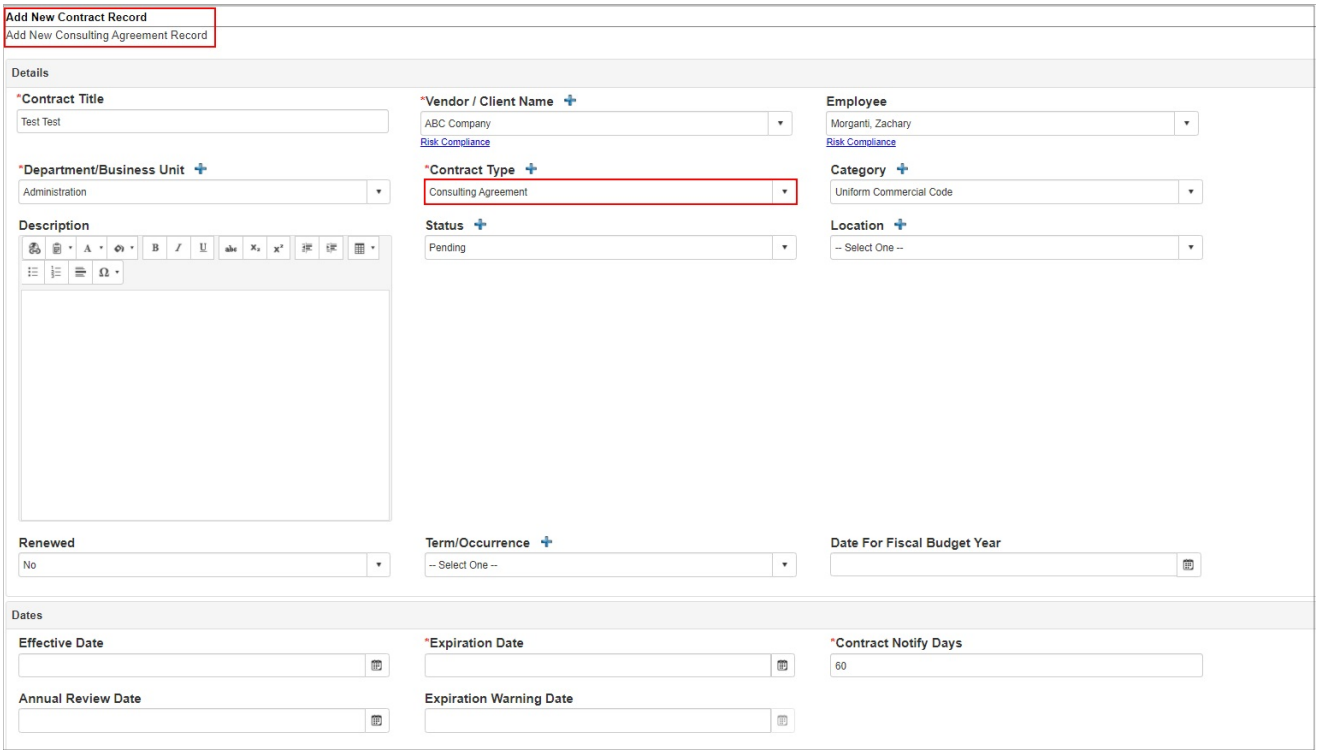


The Contract Type selection page displays. Choose the appropriate type and click **Continue**.



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Depending on the field mapping assignments specified in the **Field Mapper**, the **Add New Contract** screen will open with the fields specified in the **Field Mapper** already populated with the values specified in the Contract Request



Add any additional information to the new Contract Record as needed/required. Once all necessary/required information has been entered, click **Save & Continue** to create the new Contract Record. The new Contract Record's **Contract Details** screen opens to display the details of the newly added contract. For more information about Adding a Contract, see the Adding a Contract Record Wiki page.

Sub-Table Mapping -Manual Selection of Sub-Table Rows

As Cobblestone advances the software, more and more features are not only added, but expanded on, to provide an ideal experience for the user. With this, the functionality of the Field Mapper is actively being expanded on to encompass the manual selection of any subtable rows to map to any other subtable, as defined in the field mapper.

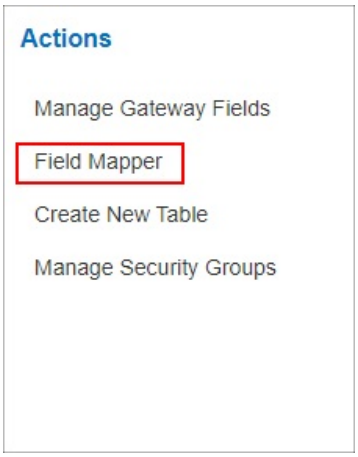
Enable a table for manual mapping

1. Click **Manage/Setup**

2. Click **Account Maintenance**

3. In the side menu, click **Field Mapper**

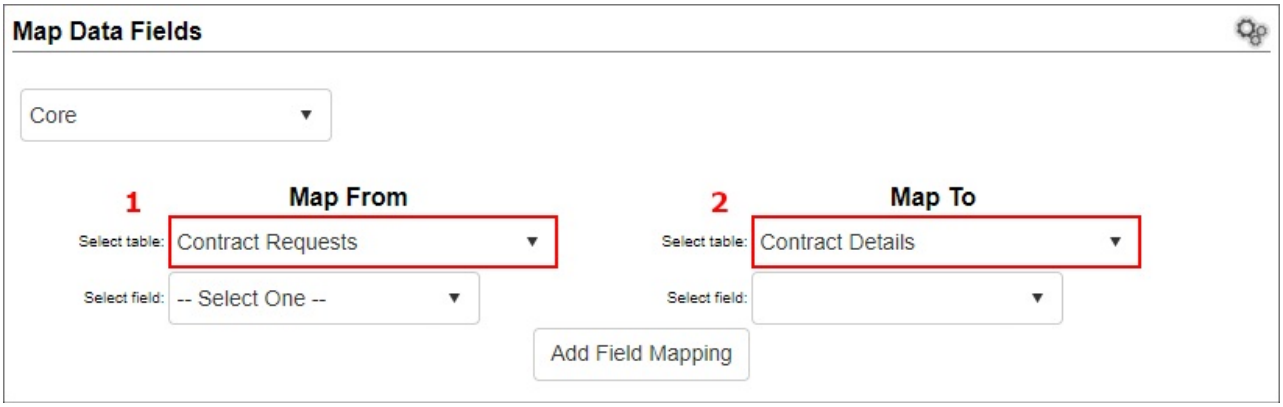
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Note: The next few steps will be an example. The user may have different fields they would like to map, but for the sake of this example, the fields that need mapping are Contract Requests to Contract Details while enabling manual file selection for the Notes Sub-Table.

4. Under the Map From section, Select **Contract Requests (1)**

5. Under the Map To section, select **Contract Details (2)**



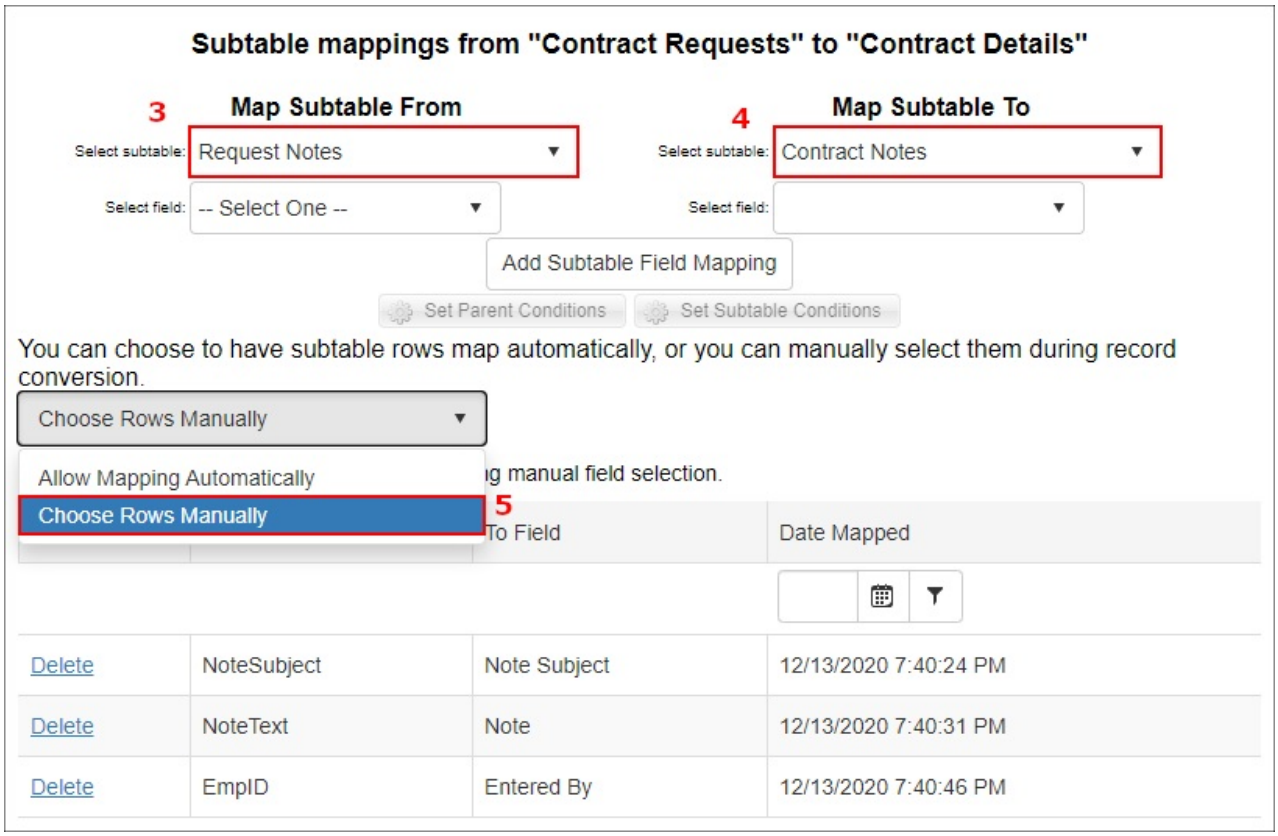
6. Scroll down to the section that reads Subtable mappings from “Contract Requests” to Contract Details”

7. Under Map Subtable From, Select **Request Notes (3)**

8. Under Map Subtable To, select **Contract Notes (4)**

9. Under this section, click the drop dox box and make sure **Choose Rows Manually (5)** is selected. This will allow individual notes to be selected during the mapping process.

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Mapping In Action

1. Go to a Request Record.

2. On the side menu, click **New Request [from] Record**.

3. A grid displays for every subtable the record has Choose Rows Manually enabled for in the field mapper. Check/uncheck the boxes for the rows you want to manually select to be mapped.

4. Click **Continue**. The user will see the parent record, as well as the selected subtable rows that were just mapped, based on the field mappings the user previously made in the Field Mapper page.

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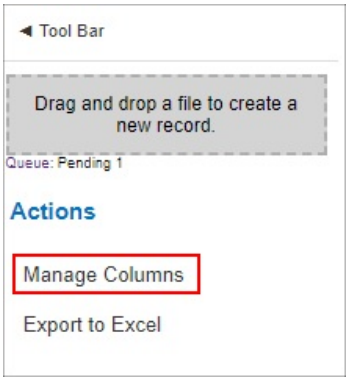
Managing and Exporting the Contract Request List Screens

Managing & Exporting the Contract Request List Screens

Searching Contract Requests: Managing & Exporting

Customize displayed Columns

To customize the columns displayed on the **Contract Requests List** screen, click **Manage Columns** on the side menu.

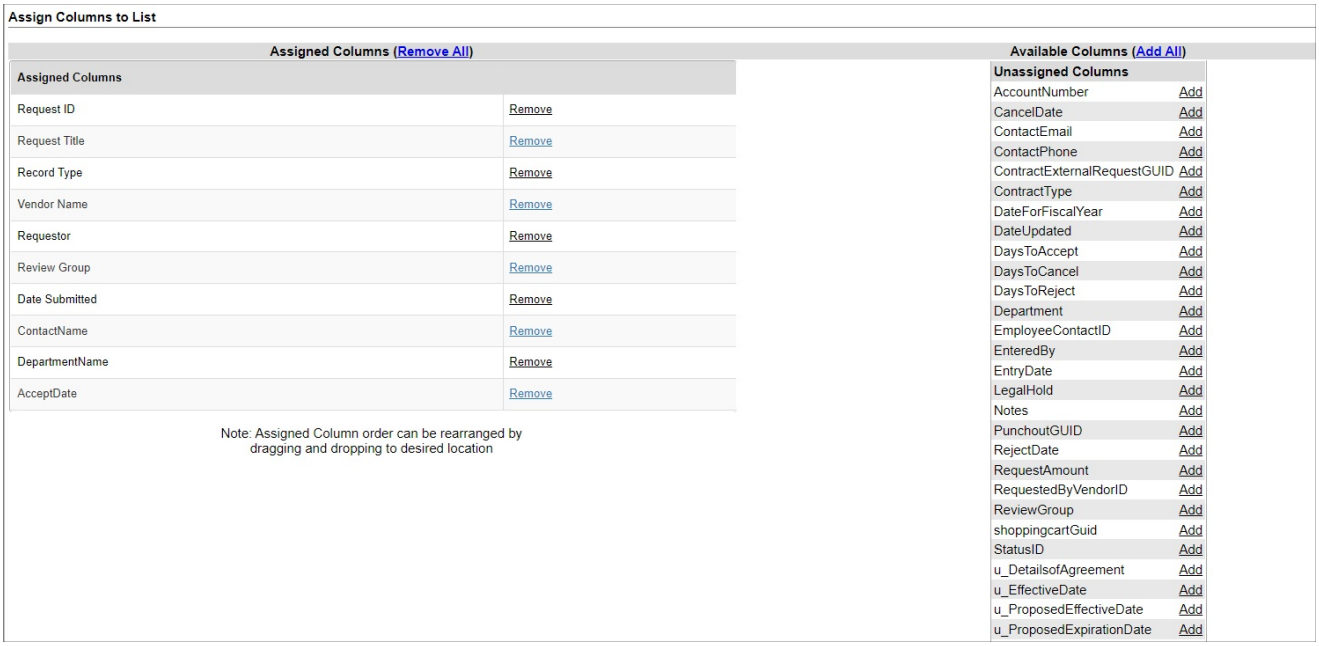


The **Assign Columns to List** screen displays where you can add Fields from the **Contract Request Details** screen to be displayed on the **Contract Request List** screen.

To add a field to the list, click the field name in the **Available Columns** box and click the **Left Blue Arrow**. The field is moved to the **Assigned Columns** box.

To remove a field from the list, click the field name in the **Assigned Columns** box and click the **Red Right Arrow**. The field is moved to the **Available Columns** box.

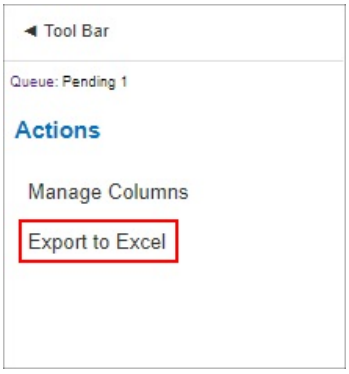
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Note: Changing the columns on the **Pending Contract Requests** screen will not affect the columns displayed on the **Review Contract Requests** screen, as they will need to be customized separately.

Exporting the Contract Request List Screens

On the **Pending Contract Requests** list screen, the list can be exported to Excel, Word, or PDF.



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Sorting and Filtering the Contract Request List Screens

Sorting & Filtering the Contract Request List Screens

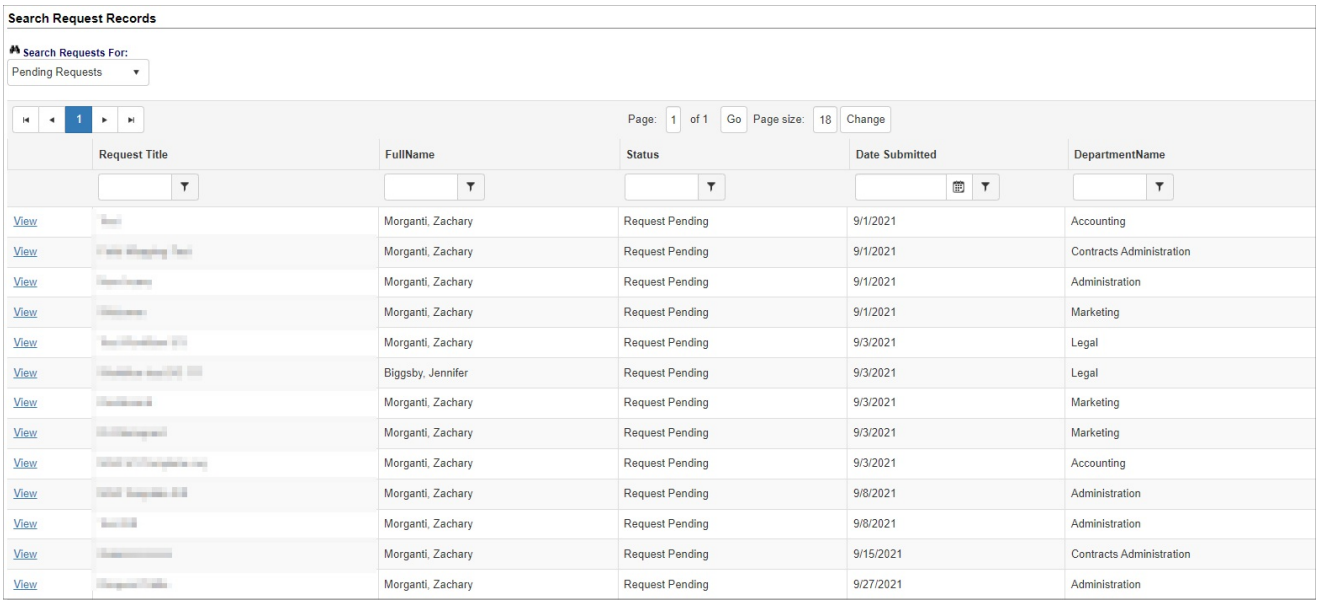
Searching Contract Requests: Sorting & Filtering

The **Pending Contract Requests** and **Review Contract Requests** screens can be sorted, filtered, and have the columns displayed customized.

Sorting the Contract Request List Screen (Pending Contract Requests & Review Contract Requests)

To Sort the **Contract Request List** screen, click the **Column Name** by which to sort.

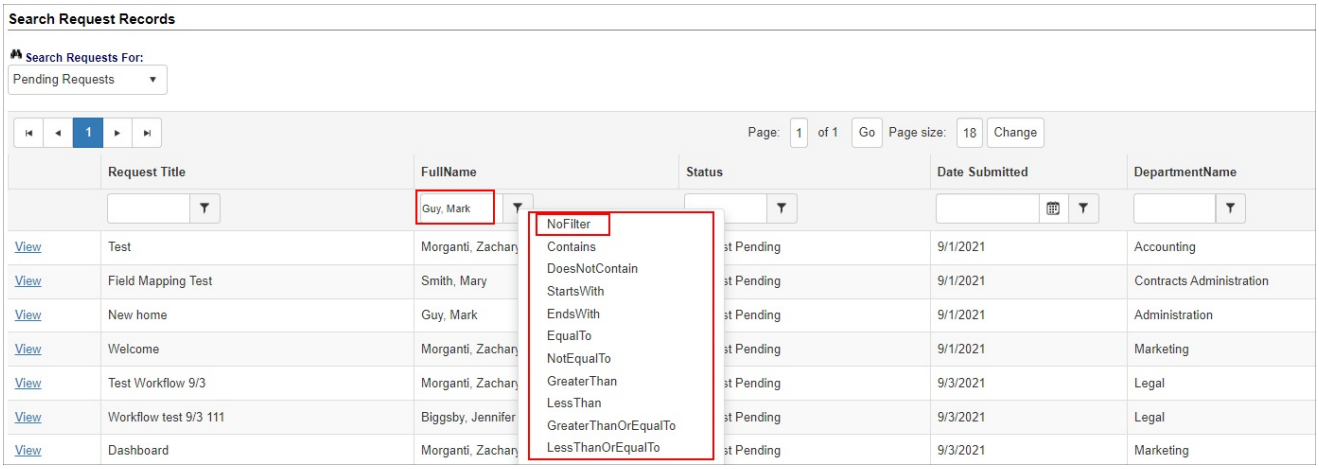
- Click once to sort ascending
- Click a second time to sort descending
- Click a third time to remove the sort order



Filtering the Contract Request List Screen (Pending Contract Requests & Review Contract Requests)

To apply a filter to the **Contract Request List** screen, enter a keyword(s) into the text box below the column name to filter by. Once you have entered the keyword(s), click the **Filter** icon and select how you would like to filter the list based on the keyword(s) entered.

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To remove the filter from the list, click the **Filter** icon and select No Filter.

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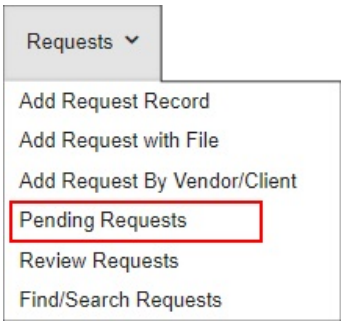
Pending Contract Requests

Pending Contract Requests

Searching Contract Requests: Pending Requests

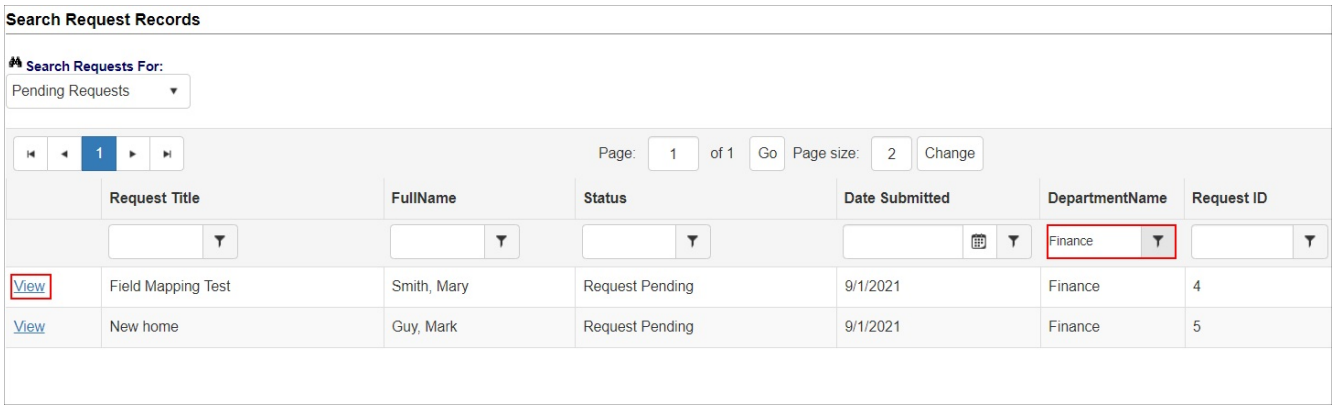
Contract Insight enables users to view any contract requests that they have submitted. (If allowed by the Application Administrator, a user is also able to see all contract requests made, or view them by department.)

1. After adding a contract request (see the Request a Contract Wiki page for more information), the requester can access the requests he/she has made by navigating to **Contracts** > **Contract Requests** > **Pending Contract Requests**.



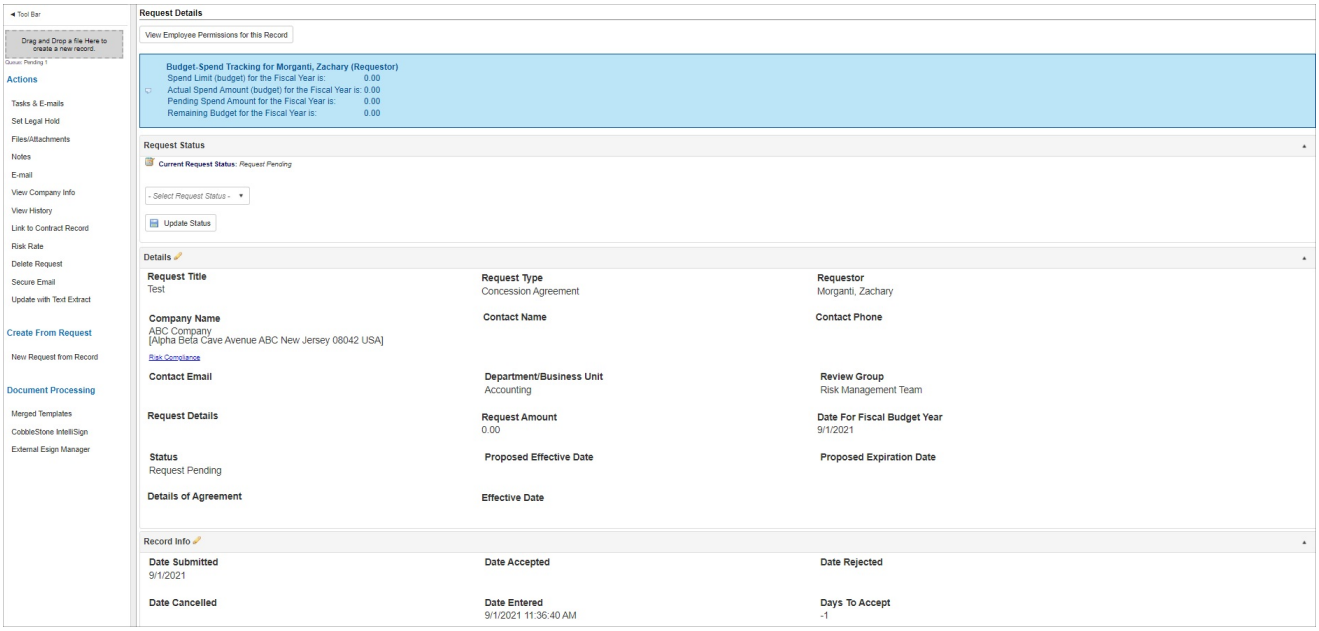
2. The **Search Pending Requests** screen displays where the requester can view any requests they have made, track the request status, and view the details of the request.

3. By selecting one of the options in the **Filter Requests By** drop down menu, the list of displayed Contract Requests changes to show the Contract Requests that meet the filter requirements.



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3. Click **View** link for the contract request line item to view. The **Contract Request Details** screen displays and the user can see the **Request Status** (i.e. pending, accepted, rejected, cancelled), track the activity of the request (**View History**), or delete the request.



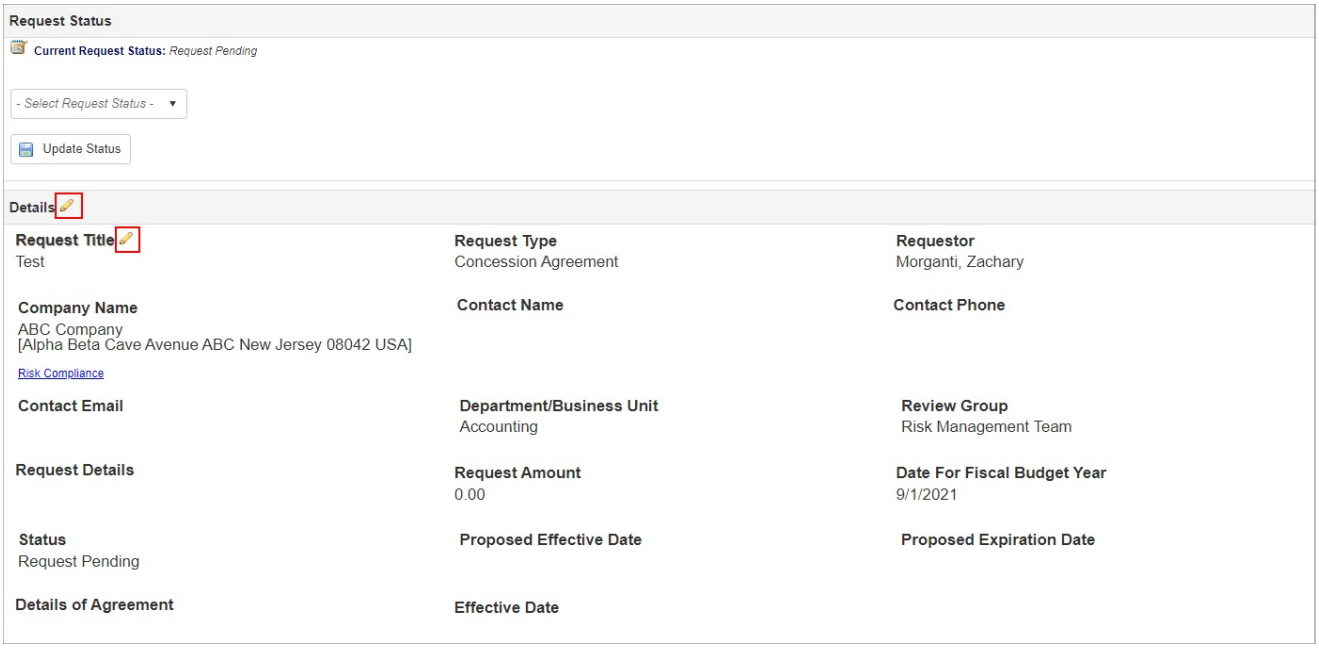
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Manage/Edit a Contract Request

Manage/Edit a Contract Request

Manage/Edit a Contract Request

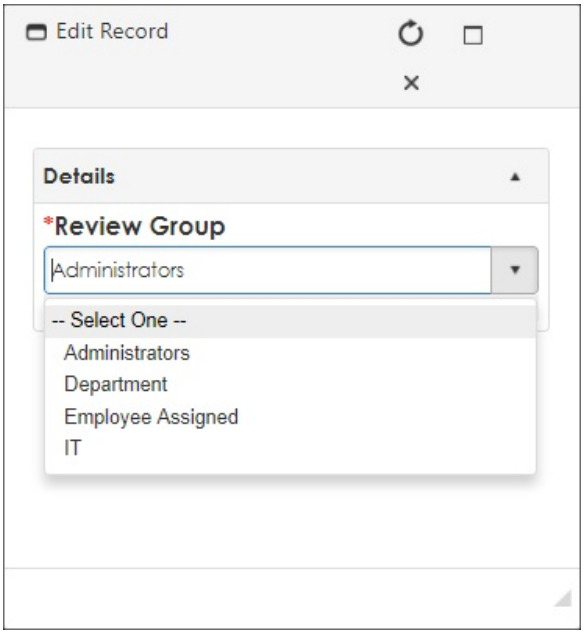
From the **Contract Request Details** screen users may edit/manage any of the data in the specified fields by clicking the **Pencil** icon ( ) to the right of each field name.



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Note: The **Date Submitted**, **Date Accepted**, **Entry Date**, **Date Rejected**, **Date Cancelled**, and **Date Updated** fields auto populate by the system as a result of performing any changes/updates to the record and cannot be changed/edited.

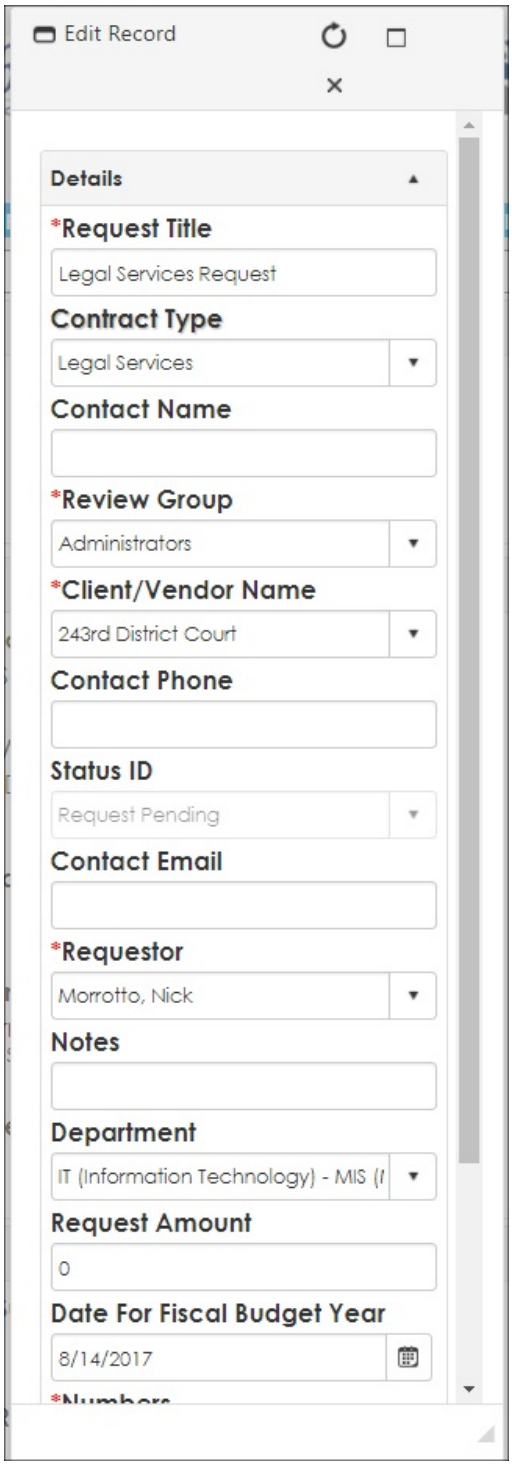
In the pop-up window, enter any changes to be made.



Note: Once a changed a field's value is made, click **Save Record** under the field to save any changes/updates.

By clicking the **Pencil** icon ( ) to the right of the field group name, edit multiple fields can be edited at once. For example, if we edit two fields and click **Save Record**, only those two fields are updated.

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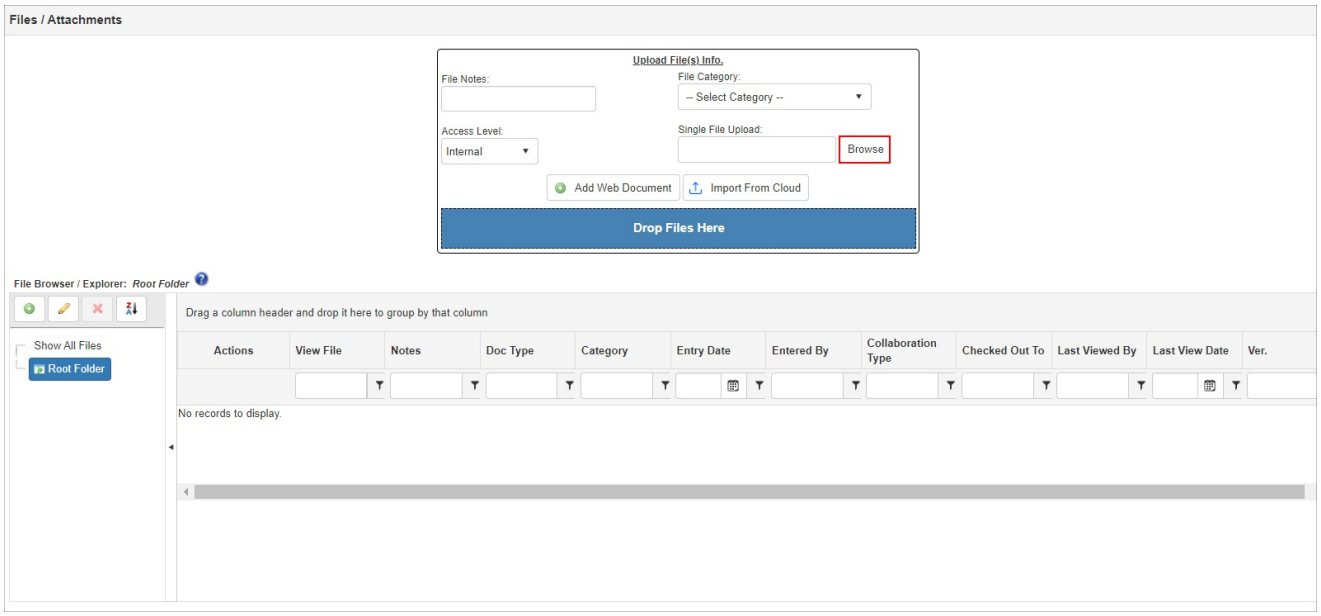
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Contract Request Attachments

Contract Request Attachments & Notes

Contract Request Files/Attachments & Notes

An unlimited number of documents/files can be attached to each Contract Request Details screen. Attaching documents/files is accomplished by clicking navigating to the Files/Attachments area. Click **Browse** to attach one file at a time. The system invokes standard windows functionality that allows users to search/browse for and select the document or file that to attach to the Contract Request.

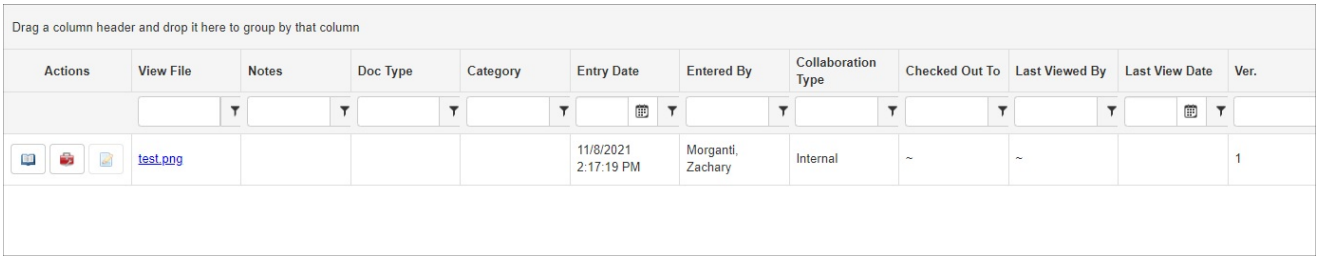


Note: The **Internal** drop down menu allows users to specify if the attachment will be able to be viewed internally only, to the Public on the **Public Portal**, or to vendors on the **Vendor/Client Gateway**. If your organization has not selected the Optional Add-On Module for either the **Public Access Portal** and/or the **Vendor/Client Gateway** and a file is attached with a **View** option of **Public** or **Gateway**, the attachment will still only be able to be viewed internally.



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Click **Save File** to attach the specified document/file to the Contract Request.

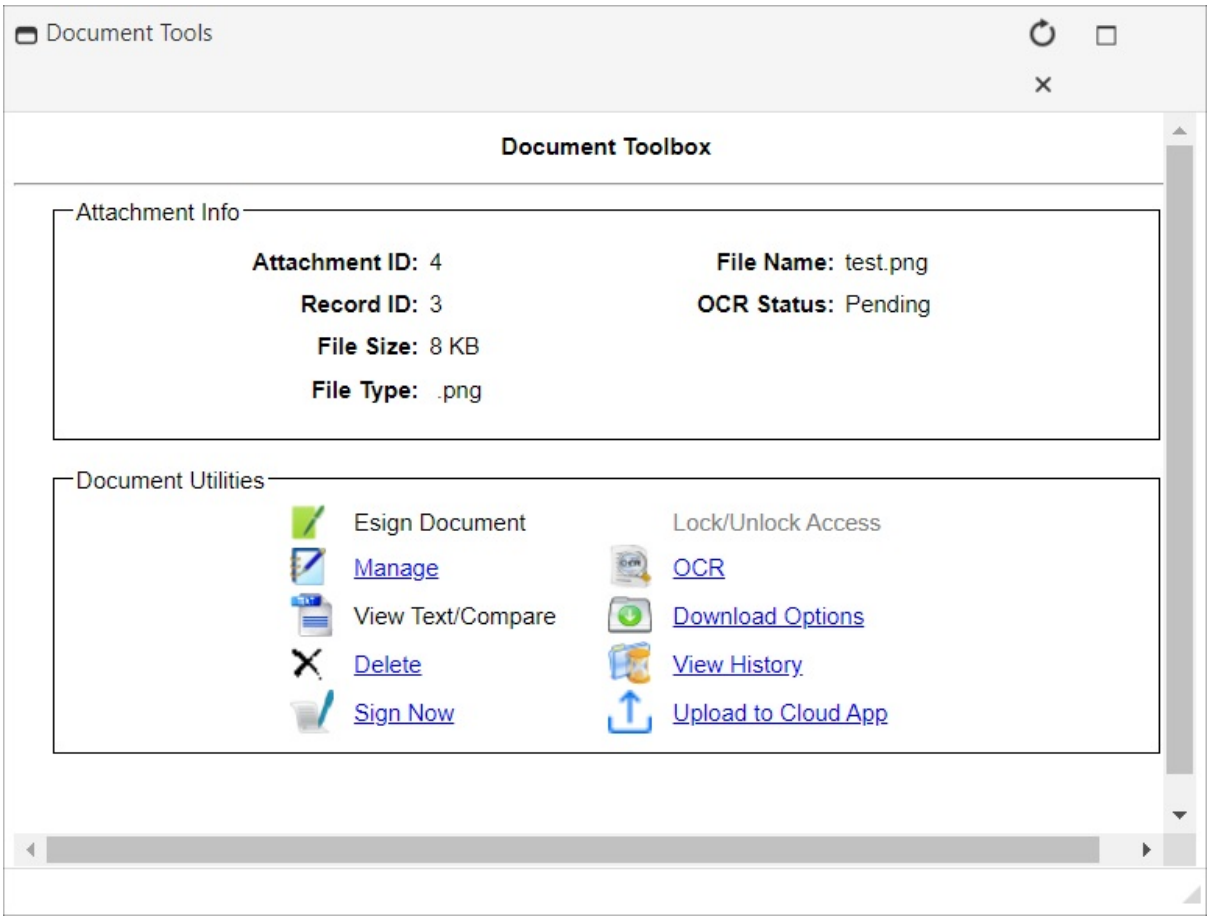


Alternatively, drag and drop the needed files onto the **Blue Box** in the **Files, Documents, Attachments** area labeled **Drop Files Here**.

Each attached document/file will be displayed in a chronologically sequenced repository grid immediately below in the **File Link** column. Each attached document/file in the repository grid will also be annotated with a date stamp, any notes that were added with the file, and the **Collaboration Type** (Internal, Public, or Gateway).

To view an attached file/document, click the file name in the **File Link** column and select whether you would like to **Open** or **Save** the file/document.

To manage and/or delete a specified attachment, click the **Red Document Toolbox** icon to the left of the file link.

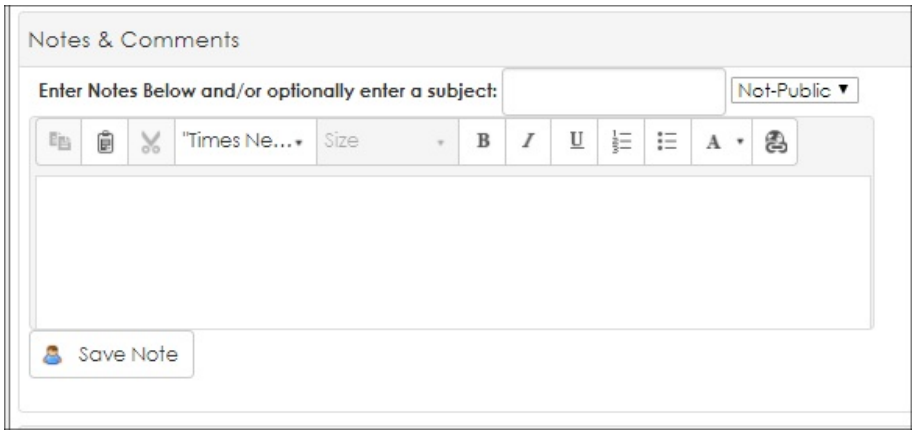


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File Notes & Comments

You may enter an unlimited number for **Diary Notes** for the Contract Request in the **Enter Notes** by keying/entering your comments, observations, and/or notes about your activities associated with the Contract Request. **Diary Notes** are keyed/entered into the provided text editor. You may optionally format your **Diary Notes** entries by using the text editor icons displayed across the top of the text editor box.

Click **Save Note**.



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Companies Overview

Companies Overview

Adding a Vendor/Company: Companies Overview

The **Companies** portion of Contract Insight is a relationship management tool that allows you to maintain business relationships no matter what the relationship type may be.

Contract Insight features contact management functionality to keep track of external contacts (**Companies**). The term **Company** is a generalized term that refers to vendors/suppliers/providers, customers/clients/partners, respondents/awardees, and/or any other people or entities with which you or your organization has a contractual business relationship.

The **Companies** portion of Contract Insight also provides users with the ability to manage and organize your business relationship contacts even if you have many different types of business relationships within your organization.

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Add a Vendor/Company

Add a Vendor/Company

Adding a Vendor/Company

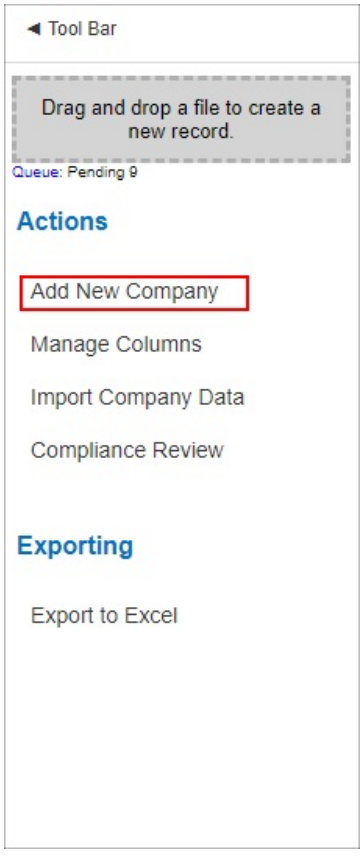
In order to add a company/vendor to Contract Insight, please note that you must have the appropriate permissions.

To Add a Company

1. Navigate to **Companies** > **Add Company**.

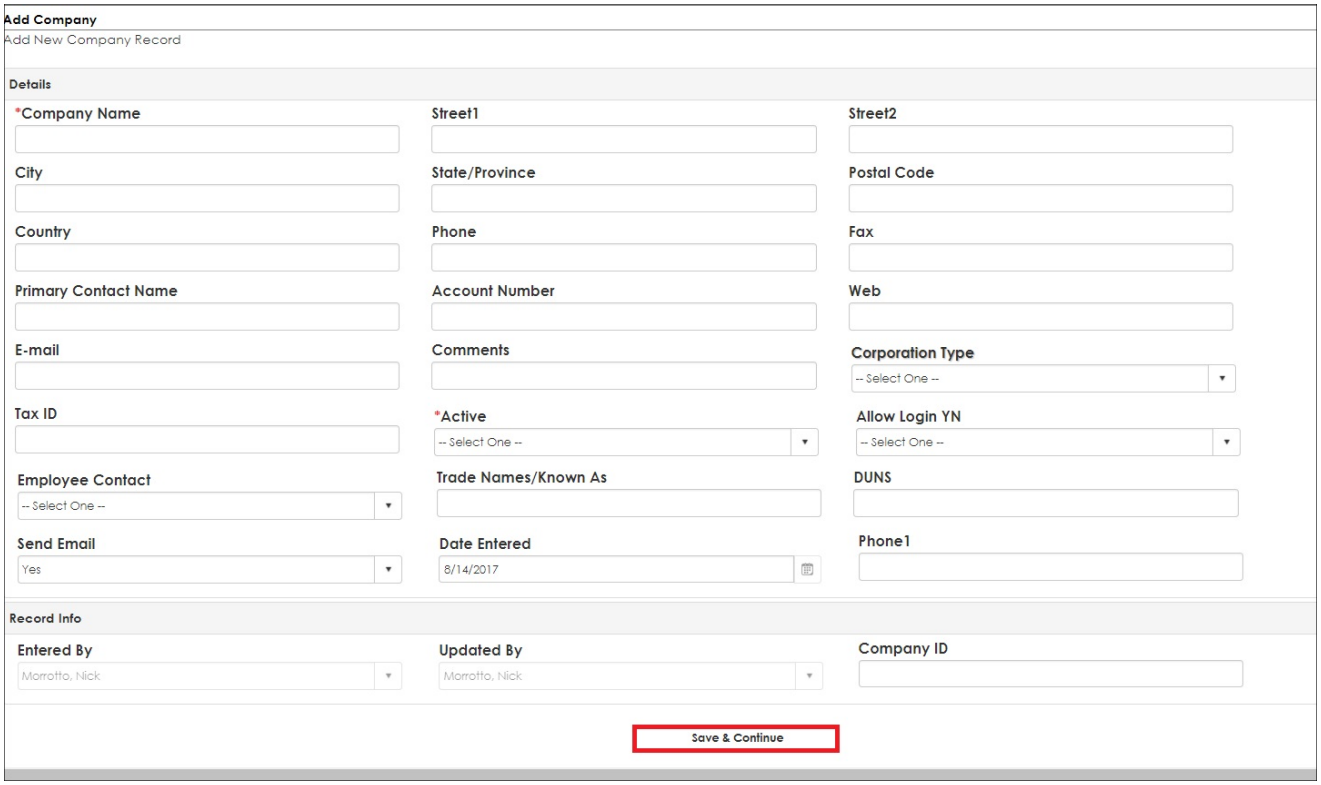
Note: An alternative method of adding a new vendor/company record is to go to navigate to **Companies** > **Company List**. On the **Vendor & Customer List** screen, click **Add Company** on the side menu.





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2. The **Add Company** screen displays.

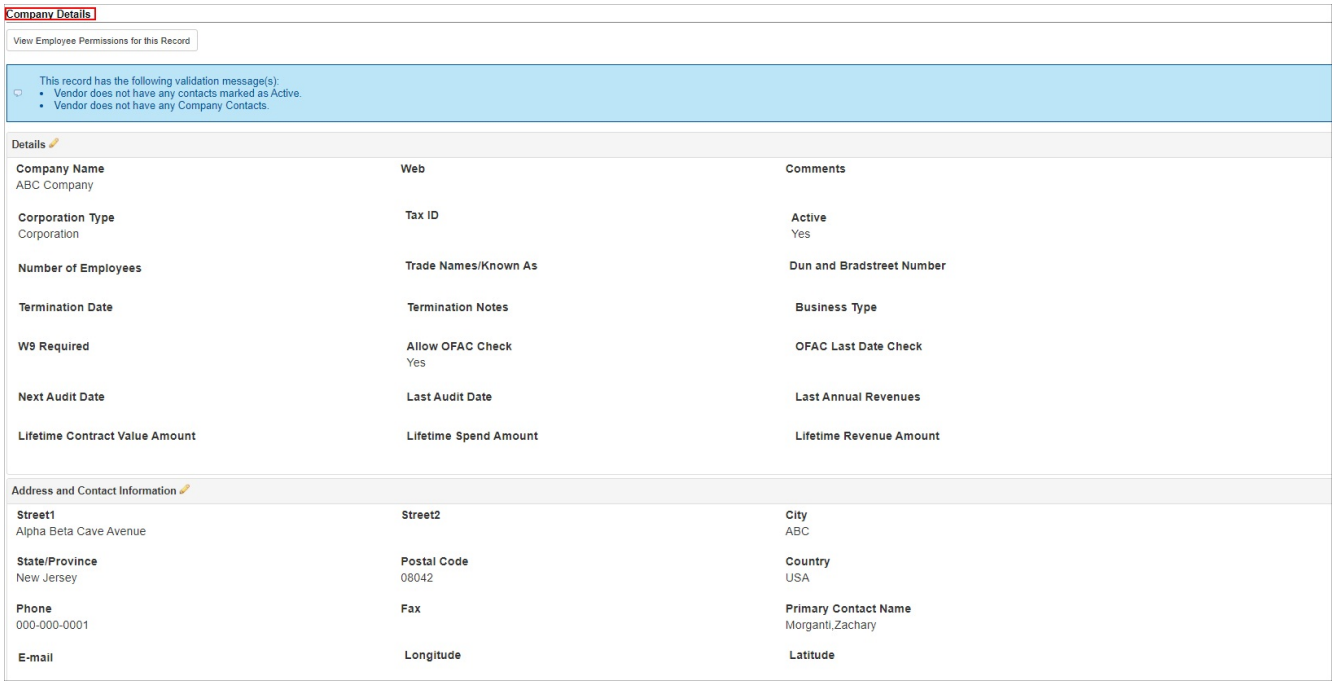


3. Complete the **Add Company** form. Be sure to enter all necessary information and required fields (marked with a red asterisk) and click **Continue**.

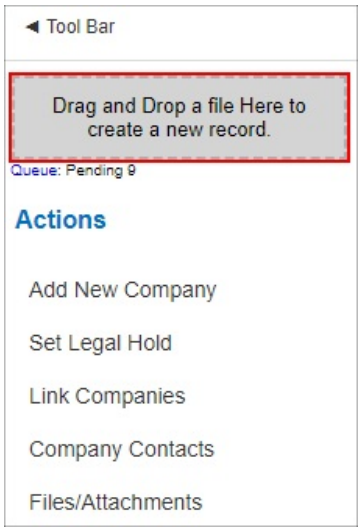
Note: The **Active** drop-down field on the **Add Company** and **Company Details** screens denotes whether or not a Vendor/Customer is shown in the drop down list on the **Contract Add** screen.

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4. The new **Vendor/Company's Company Details** screen displays.

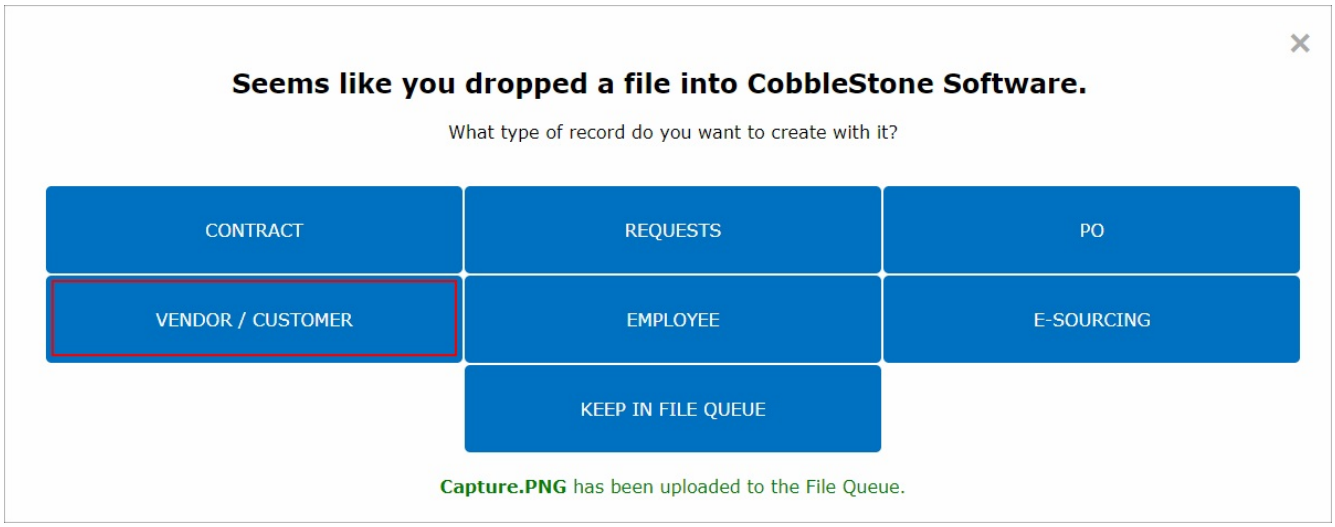


You are also able to add a company record from a file on any screen with the grey Drag and Drop box in the side menu by dragging and dropping a file onto the page.



Then you will be prompted to choose what kind of record you want to create. For a vendor/customer you will want to click the Vendor/Customer button.

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Afterwards you have the ability to review the file and can fill out all metadata for the record.

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Add Vendor/Company on Contract Add

Add Vendor/Company on Contract Add

Adding a Vendor/Company: On Contract Add

This functionality has been replaced by Add Counterparty In-Line.

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Add Counterparty In-Line

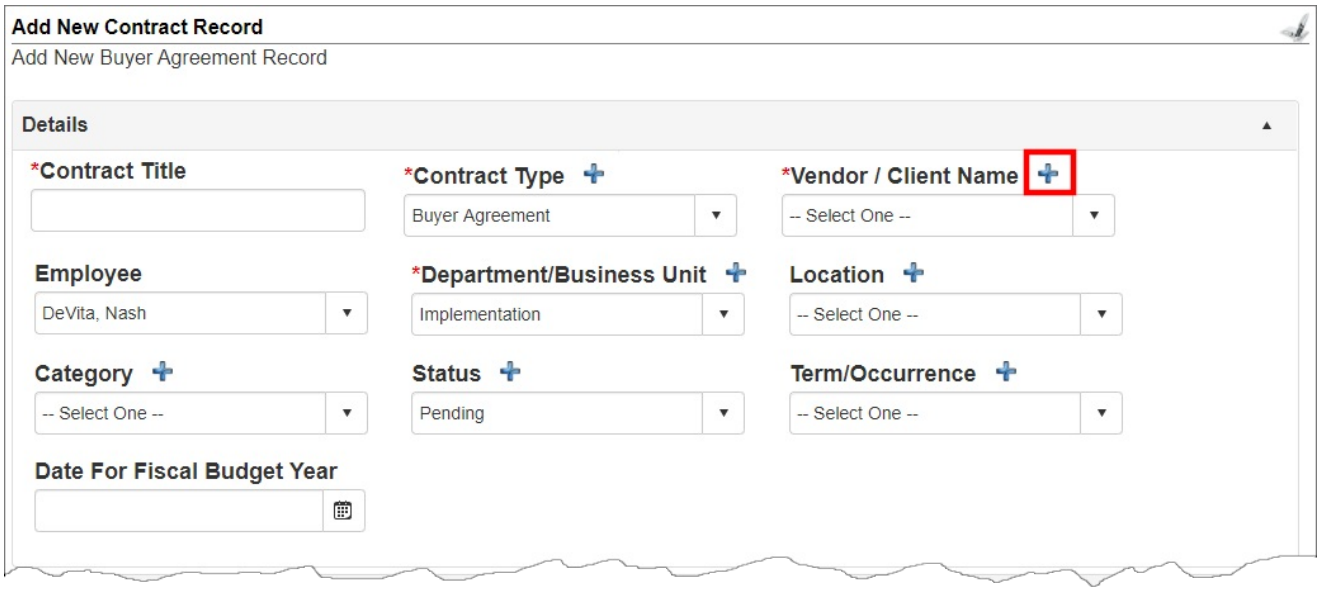
Add Counterparty In-Line

Master Reference Data Management: Vendor/Client

Users who have been granted the permissions to add counterparty/vendor/customer/client records can also add the data in-line when entering a new record such as a contract.

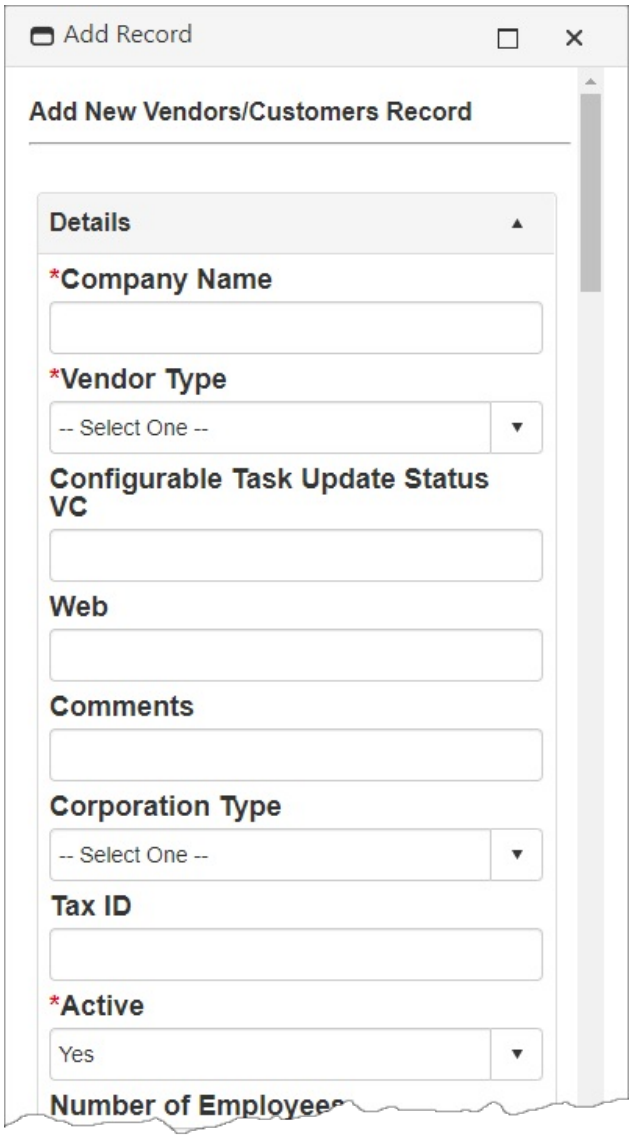
To Add a Counterparty

1. On the add screen for the record in question, click the applicable blue + ( ) icon.



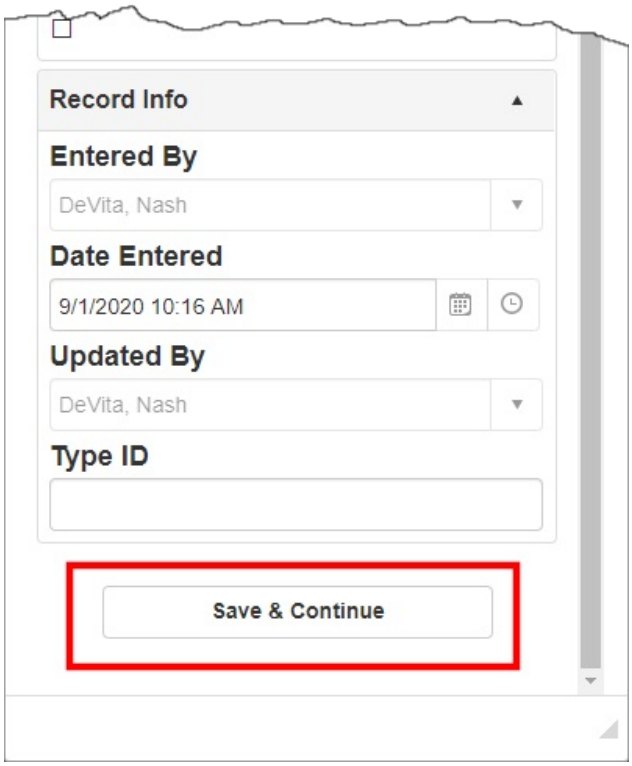
2. A pop-up add screen displays. Complete all required fields.

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3. At the bottom of the pop-up, click **Save and Continue**.

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4. The pop-up window closes and the new newly created company is entered into the Vendor/Client Name field.

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Viewing, Filtering & Sorting Company List

Viewing, Filtering & Sorting the Company List

Vendor/Company List: Viewing, Filtering, and Sorting

Contract Insight enables users to view and edit the company list (provided the user has the appropriate administrative permissions to edit).

1. Navigate to **Companies** > **Company List**.

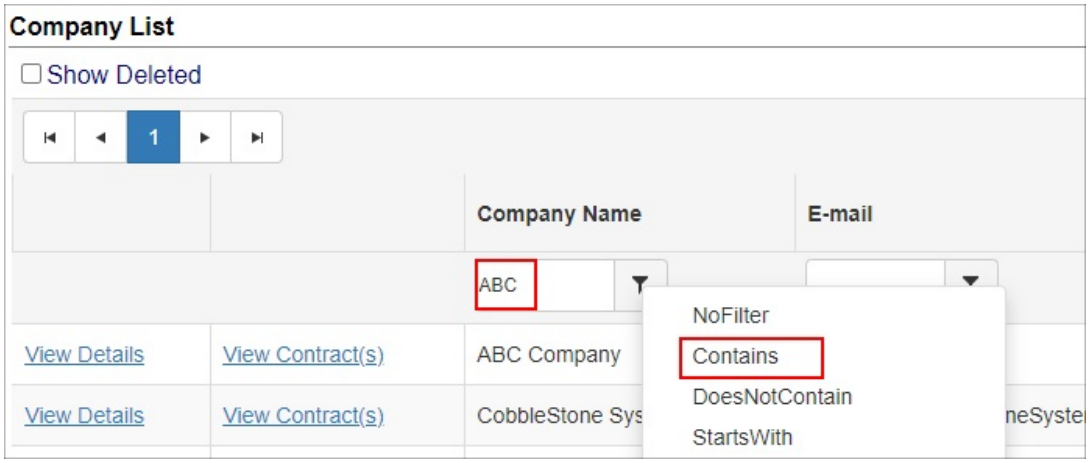


2. The **Vendor & Company List** screen displays a list of all companies in the system.

Filtering the Company List

1. To filter the Company List, enter a keyword(s) into the text-box for the column from which to filter.

2. Click the **filter** icon and select the means of filtering based on the keyword(s) entered.



3. To remove the filter, click the **filter** icon and select the **No Filter** option.

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Sorting the Company List

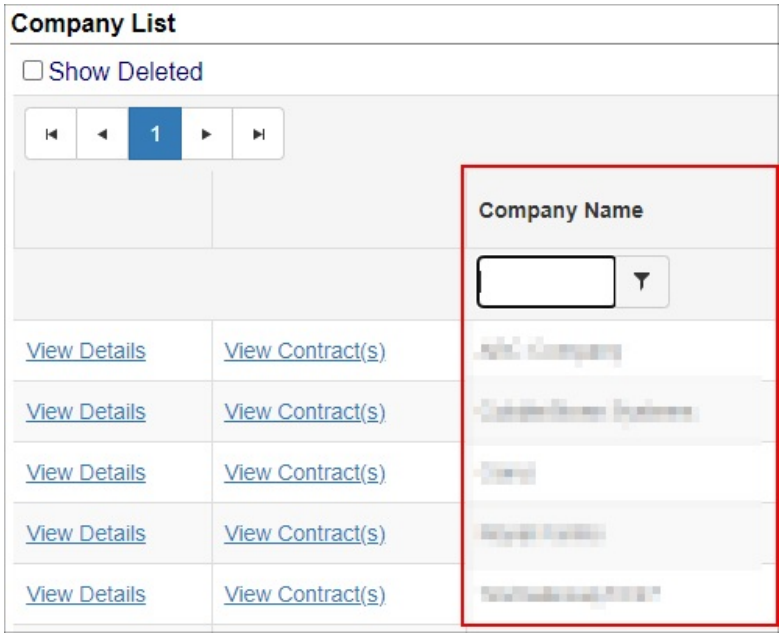
1. Click the **column name** by which to sort by.

a. Click once to sort in ascending sort order.

b. Click a second time to sort in descending sort order.

c. Click a third time to remove the sort order from the Company List.

2. A sort order can be applied to as many columns as needed.



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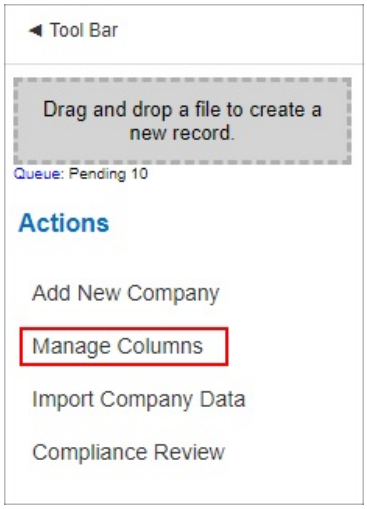
Modifying Columns Displayed on the Company List

Modifying Columns Displayed on the Company List

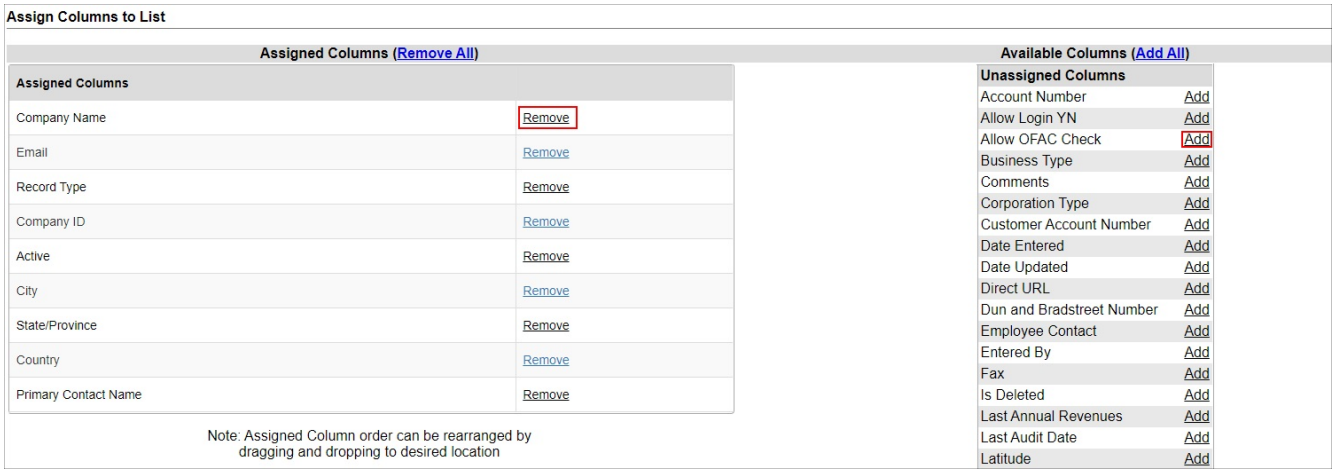
Vendor/Company List: Modifying Columns Displayed

System Administrators can edit what columns are shown in the **Vendor & Customer List**.

1. Click **Manage Columns** on the side menu of the **Company List** screen.



2. The **Assign Columns to List** screen displays.



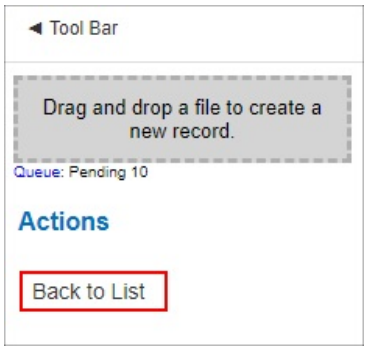
3. To assign a column to the **Company List** table, click the **Remove** button to add the column name to the **Assigned Columns** box.

Note: The default (system required) columns are not shown in the **Assigned Columns** box.

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4. To remove a column from the **Company List** table, click the **Remove** button to remove the column name from the box.

5. Click **Back to List** on the side menu of the **Assign Columns to List** screen to return to the **Company List** screen.



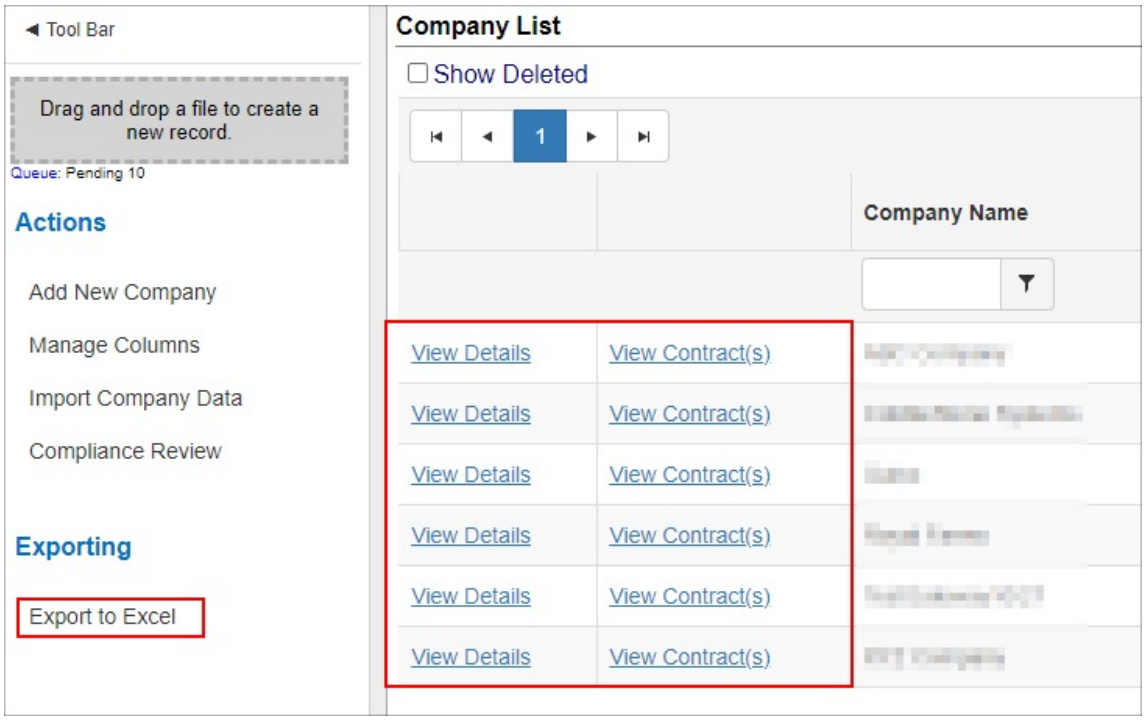
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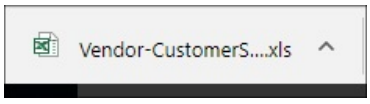
Exporting the Company List

Exporting the Company List

Vendor/Customer List: Exporting the List

Contract Insight enables users to export the Company List to Excel, Word, or PDF files.





	A	B	C
1	Company Name	E-mail	State/Province
2	1687 Foundation, The		
3	243rd District Court		
4	384th District Court		
5	3M Health Information Systems		
6	6070 Gateway East, L.P.		
7	65th Judicial District Court		
8	A.D.A.M., Inc.		
9	Abbott Diabetes Care, Inc.		
10	Abbott Laboratories, Inc.		
11	Abbott Nutrition		
12	Abbott Vascular		
13	ABC		
14	ABC Corp	info@abc.com	NJ
15	ABILITY Network Inc.		
16	Absolute Software, Inc.		
17	Academy of Healthcare Revenue, LLC, The		
18	Access MediQuip		
19	Acosta, Yvonne M.		
20	ACS State Healthcare, LLC		

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Note: When exporting the Company List, the export includes ALL fields on the screen, including the **View Details** and **View Contracts** links (the links will be disabled once exported). It is the user's responsibility to delete these columns from the exported document.

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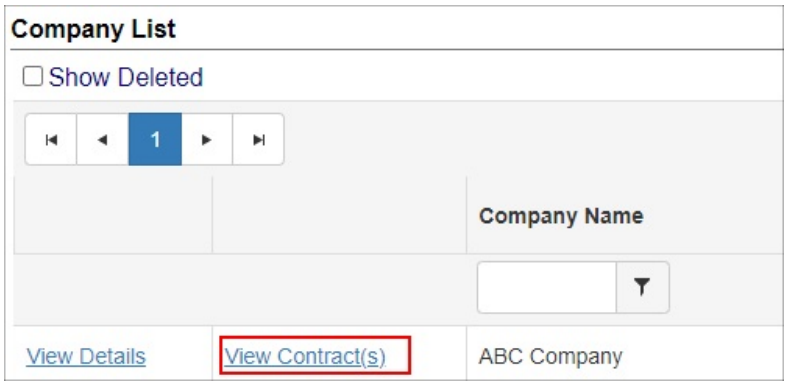
View Company Contracts

View Company Contracts

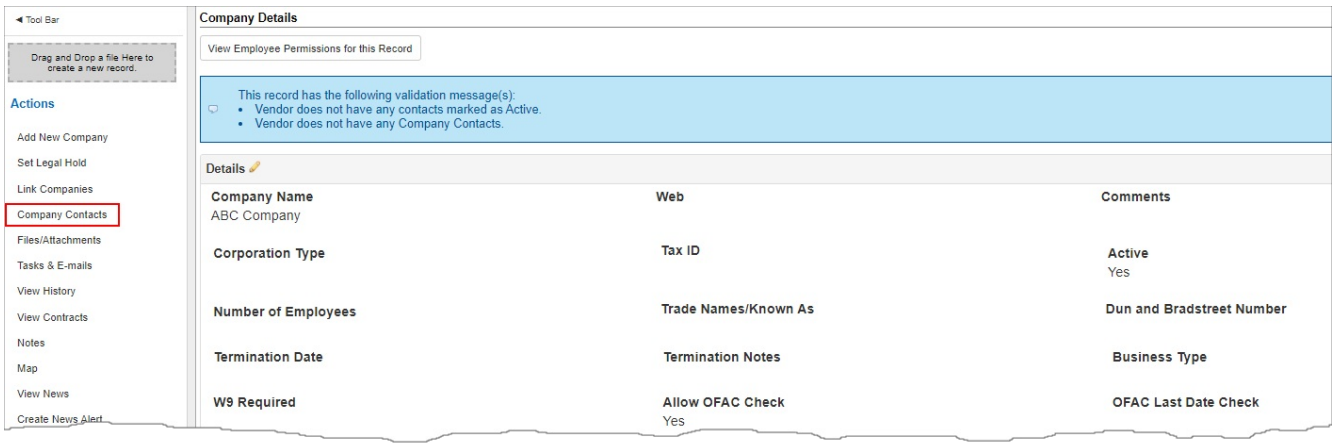
View Company Contracts

A user can view all contracts that their organization has with a particular company by navigating to the **Company List**.

1. Click **View Contract(s)** on the left of the company name line item for which to view all of the contracts.

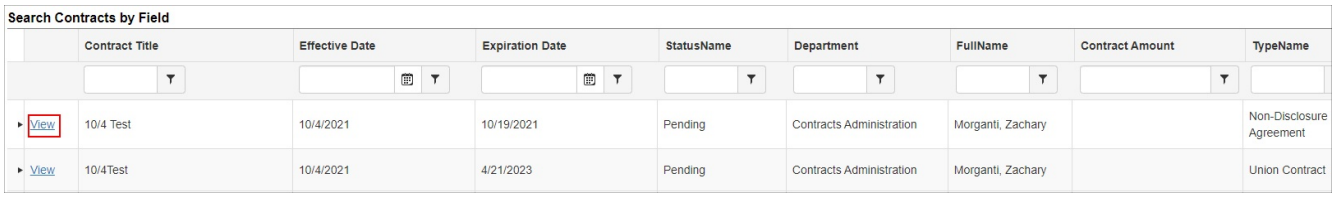


Alternatively, click **View Details** for the company to open the **Company Details** screen and click **Company Contracts** on the side menu.

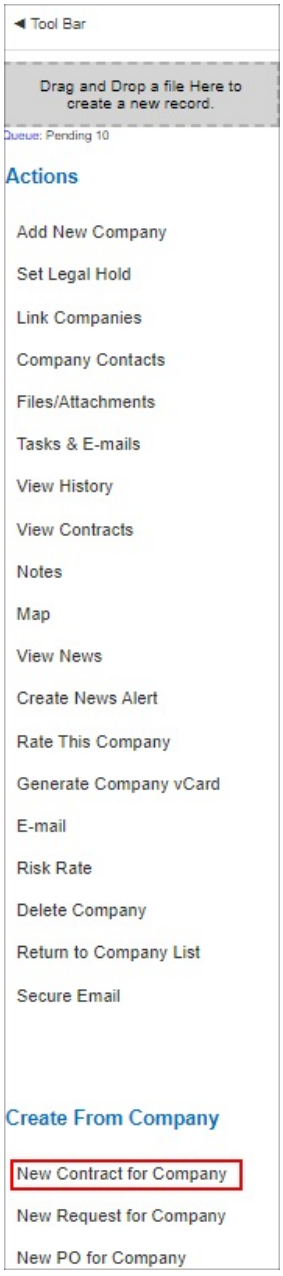


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2. The contracts your organization has with the selected company display.

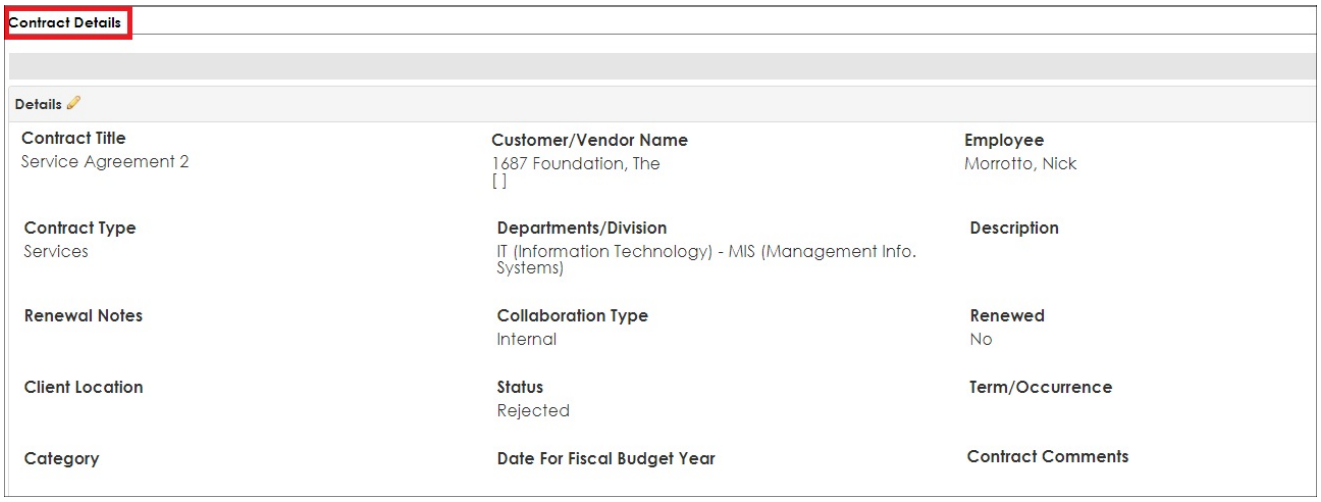


Note: A new Contract with the Company being viewed can be added by clicking on **New Contract for Company** on the side menu.



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3. View the **Contract Details** page for each particular contract record by clicking **View** next to the line item to view (see the View Company Details Wiki page).



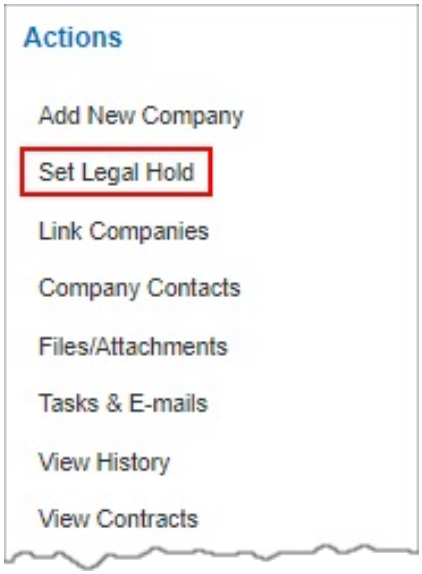
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Legal Hold

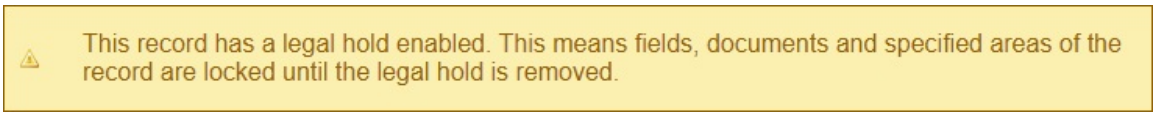
Legal Hold

Vendor/Customer Details: Legal Hold

A System Admin User or any User with the **Setup: Manage Legal Holds** Permission assigned can manage a Company Record's **Legal Hold** Status. To put a record on Legal Hold, click **Set Legal Hold** on the side menu, then confirm via the pop-up.

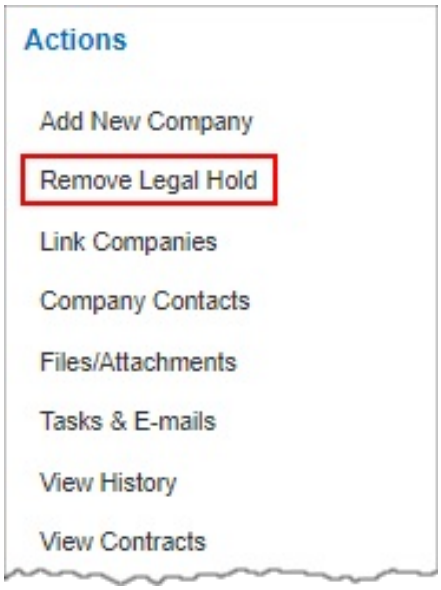


A banner, as seen below, appears along the top of the record. Fields are locked from editing and Attachments can no longer be added or deleted.



To remove the Legal Hold, click **Remove Legal Hold** on the side menu, then confirm via the pop-up.

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To be able to attach new files while a record is on Legal Hold, there is a configuration setting for that. Navigate to:

Manage/Setup > **Application Configuration** > **Config Settings**

Make sure **Security** is selected for the **Select Configuration Group** drop down. Go to **Group: Legal Hold** and adjust the **Disable File Uploads with Legal Hold** setting.

There is also a configuration setting regarding Document Authoring and Document Collaboration processes while on Legal Hold. (Document Collaboration being only relevant if using the Document Collaboration Add-On Module)

Select **Security** for **Select Configuration Group**. Modify **Document Collaboration with Legal Hold** as necessary.

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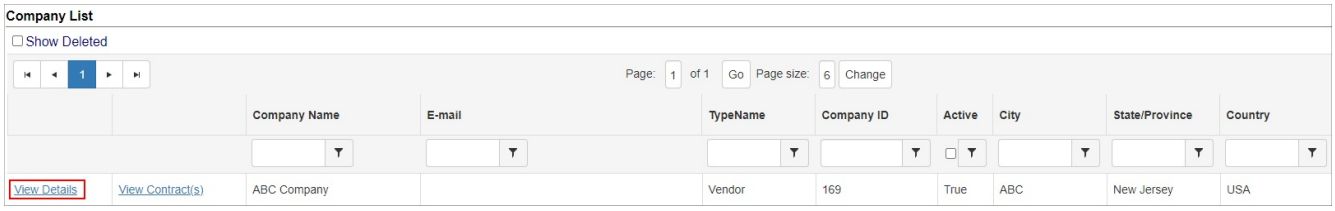
Vendor/Company Contract Requests

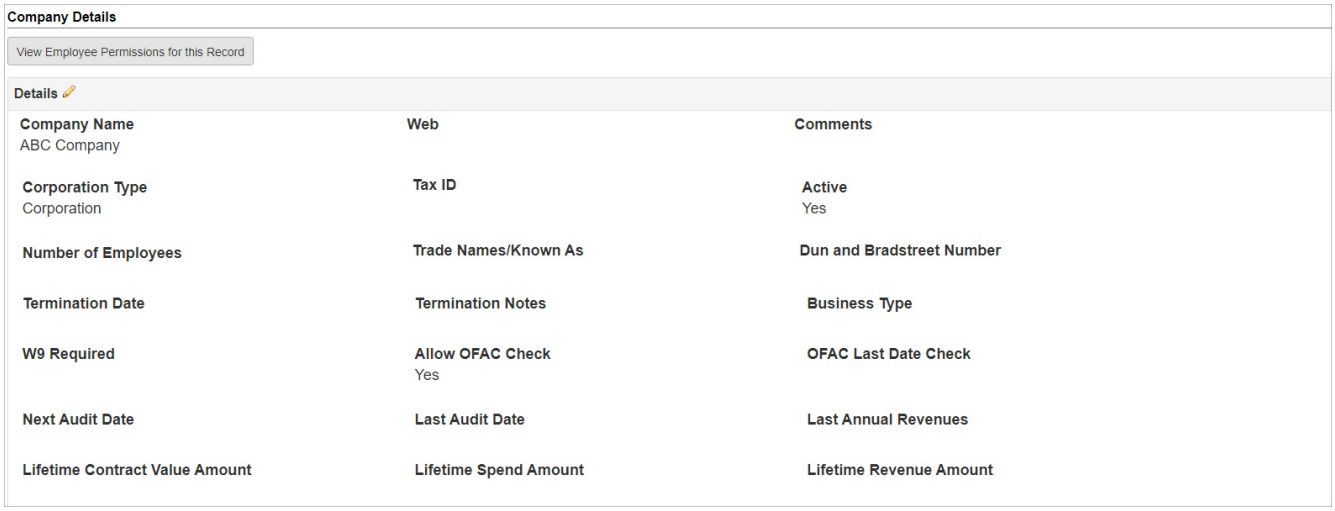
Vendor/Company Contract Requests

Vendor/Company Details: Contract Requests

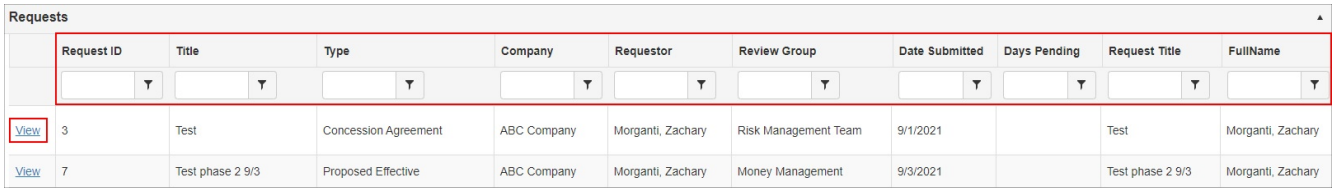
A Contract Request Repository section has been added to the **Company Details** screen for Companies/Vendors that have Contract Requests pending.

1. To view the Contract Requests Repository for a Company, click **View Details** for the Company in the Company List to open the **Company Details** screen.





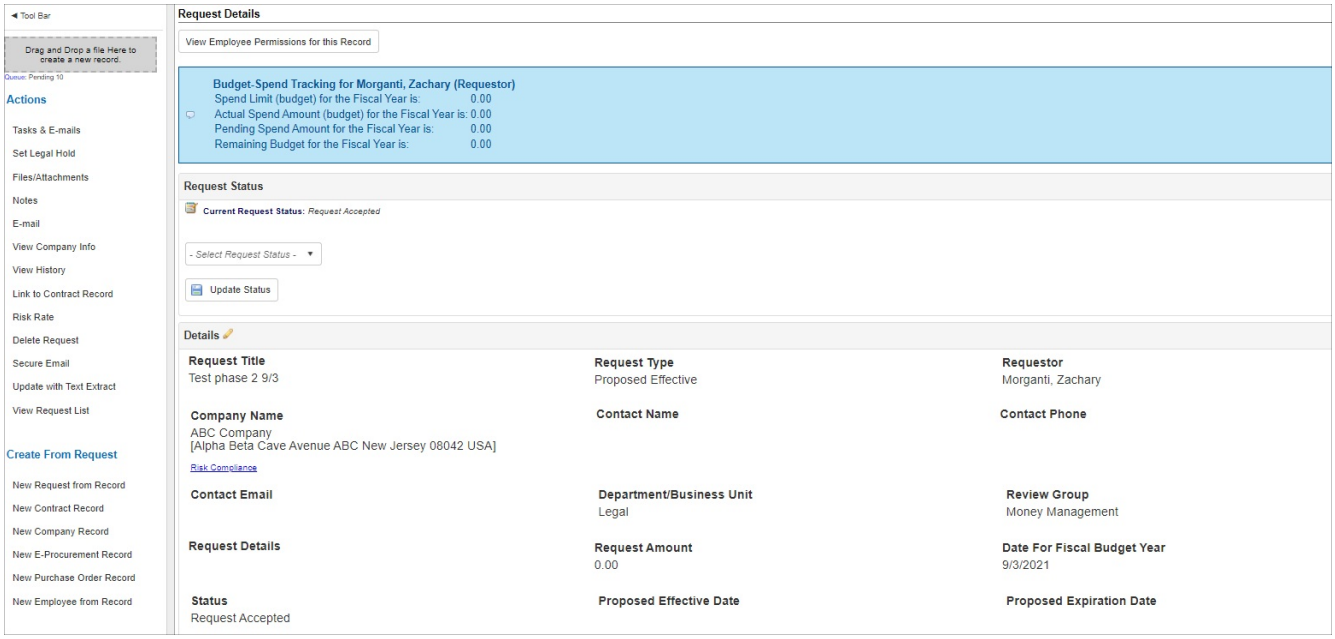
2. On the **Company Details** screen, scroll down the page to the **Contract Requests** section of the screen where a list of any Contract Requests that have been submitted for this Company can be viewed.



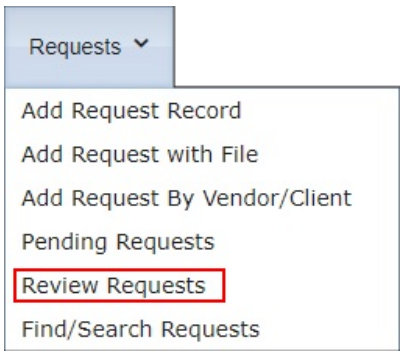
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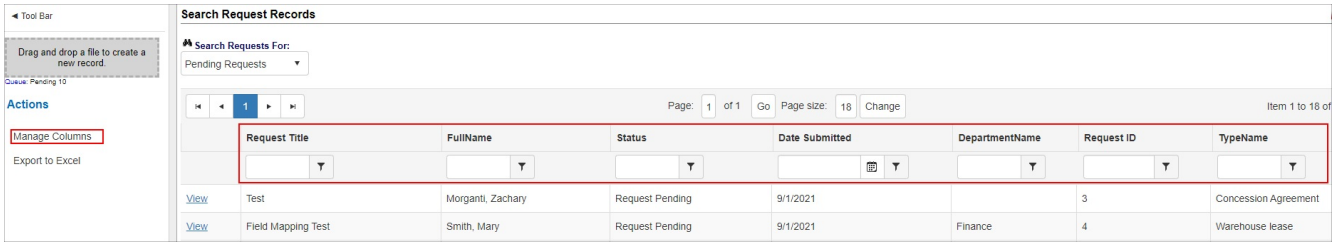
3. In the Requests section, note that users can **Sort** and **Filter** the list the same as they would for any other list screens. To Sort the list, click the column name once for an ascending sort order, a second time for a descending sort order, and a third time to remove the sort order. To Filter the list, enter a Keyword(s) by which to filter the list for and click the **Filter Icon** to select how to filter the list based on the keyword(s) entered.

4. To View the Contract Request Details screen from the Requests section, click **View** for the Request row for which to view the details.



5. On the **Company Details** screen, the columns that show up in the **Requests** section are determined by the columns that have been selected to show on the **Review Requests** and **Pending Requests** screens using **Manage Columns** on the side menu.





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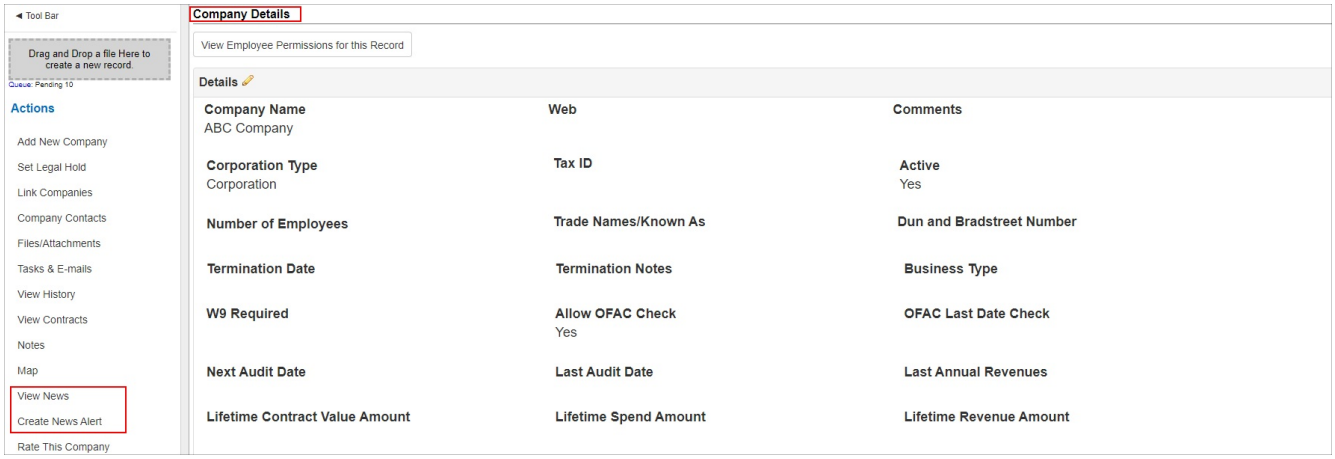
Vendor/Company News Alerts

Vendor/Company News Alerts

Vendor/Company Details: News Alerts

Viewing Company News Alerts

Contract Insight provides users with the ability to view any news about a company by clicking **View News** on the side menu on the **Company Details** screen.

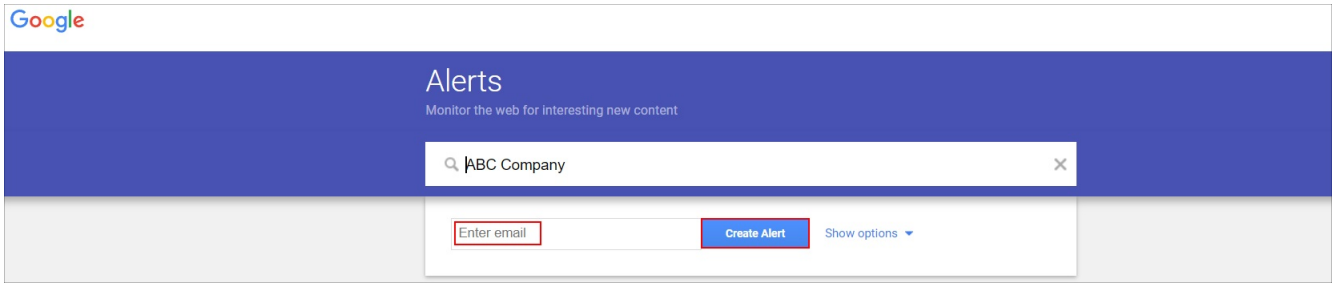


By clicking **View News,** a new screen opens to the Google News website where the search for the company name has already been executed and results are displayed.

Create a News Alert for Company

Administrators may create a news alert for a company by clicking **Create News Alert** on the side menu on the **Company Details** screen.

A new screen where you can create an alert using Google Alerts for any news that occurs concerning the company opens.



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Provide the necessary information and click **Create Alert** to begin receiving alerts when any new information is found for the company.

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Viewing the Vendor/Company Details Screen

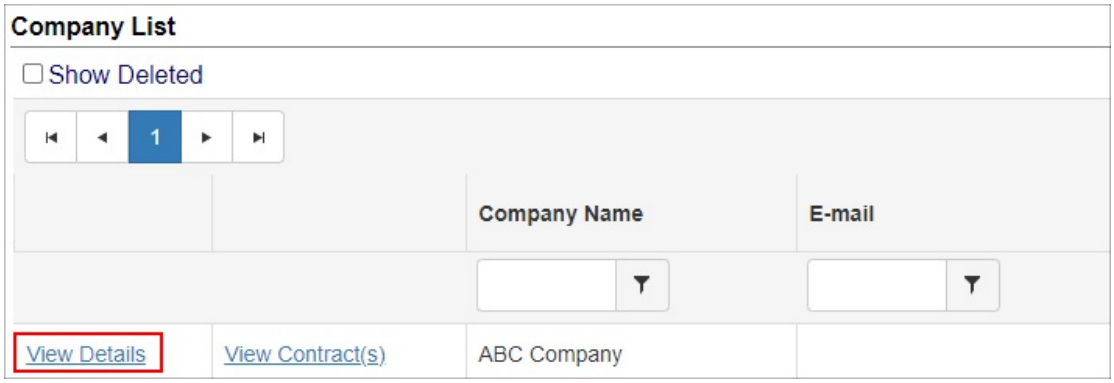
Viewing the Vendor/Company Details Screen

Vendor/Company Details: Viewing the Details Screen

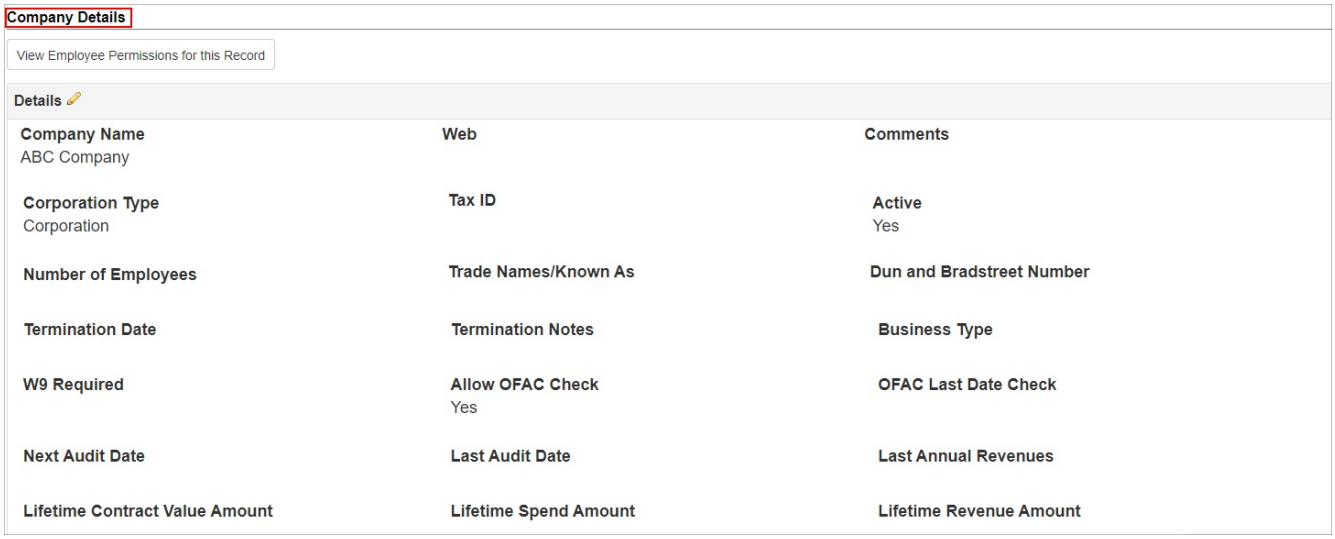
Contract Insight enables users to view a company's details.

1. Navigate to **Companies** > **Company List**.

2. Click **View Details** for the company name line item to view that companies details.

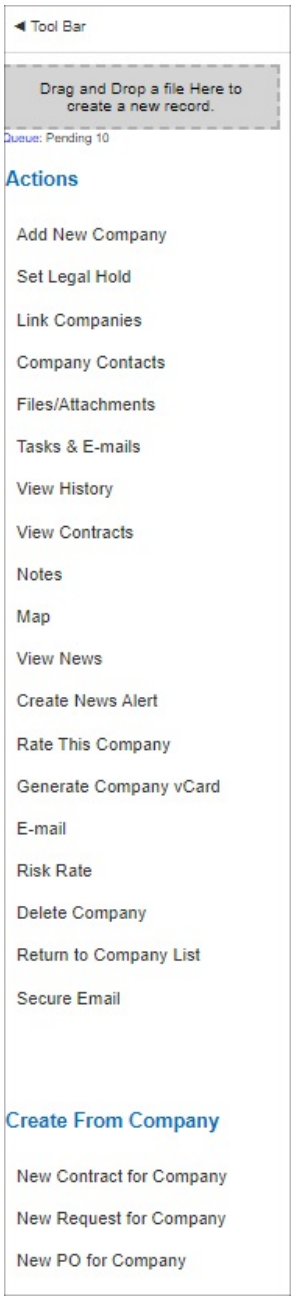


3. The **Company Details** screen for the line item selected displays.



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4. The menu list on the **Company Details** screen provides quick links to manage the Company Details record. Each option is discussed in detail on other pages in this Wiki Section.



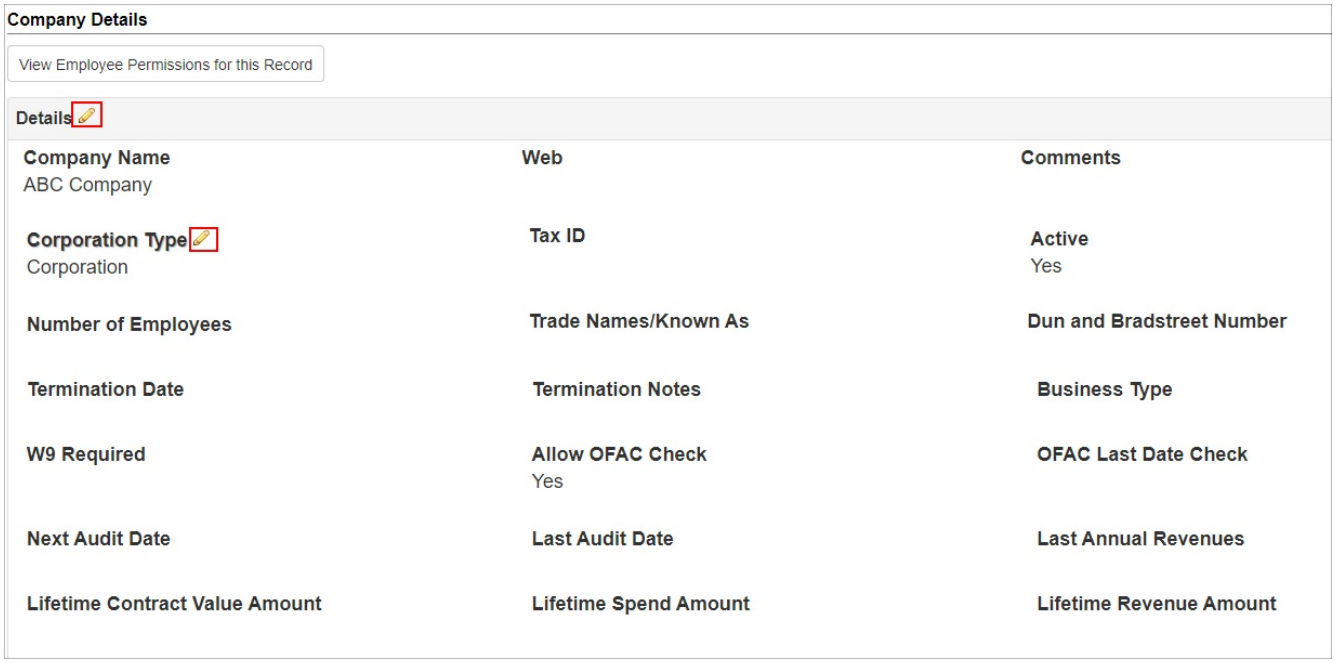
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Manage & Edit The Company Details Screen

Manage & Edit the Company Details Screen

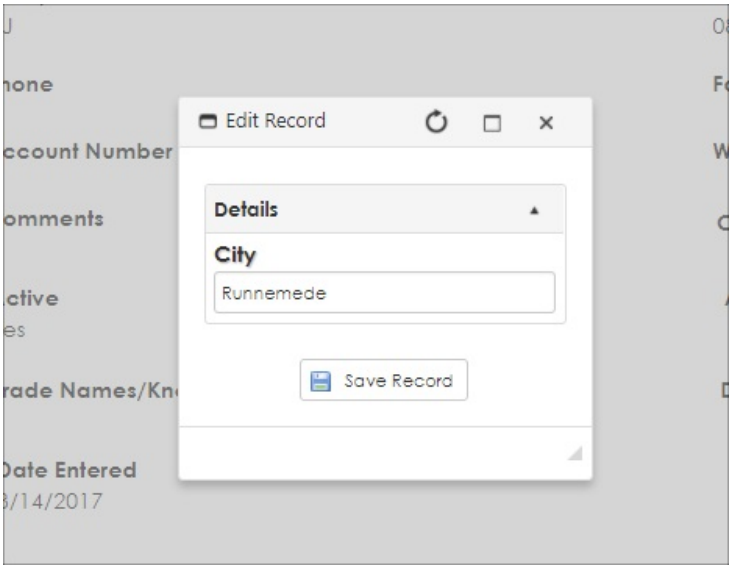
Vendor/Company Details: Managing and Editing the Details Screen

1. To manage and edit a Company's **Company Details** screen, navigate to the appropriate company's Details screen.

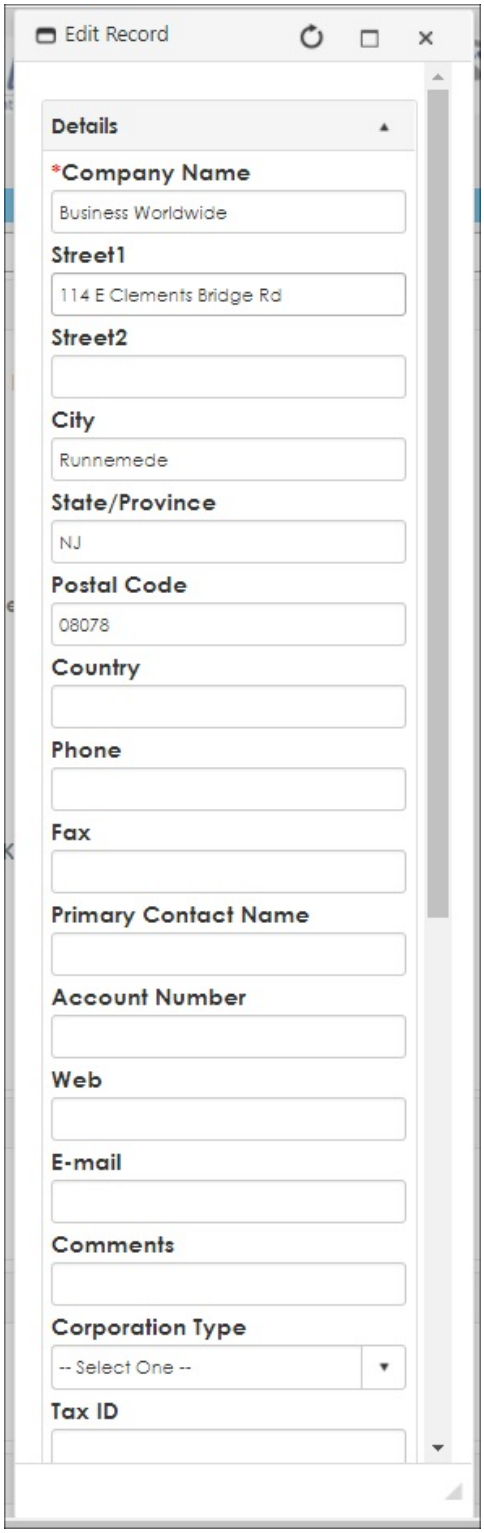


2. When the area to the right of any field is hovered over, a **Pencil Icon** ( ) appears to the right of the field name. It displays so the field can be edited. There is also a **Pencil Icon** ( ) to the right of the **Field Group** (Ex: Details).

3. To edit a field on the **Company Details** screen, click the **Pencil Icon** ( ) for the field to edit/update.



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Alternatively, to update multiple fields at a time, click the **Pencil Icon** ( ) to the right of the **Field Group**.

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4. Enter/select (depending on the field type) the new value and click **Save Record**. Click the **Pencil Icon** ( ) to the right of the field group to edit multiple fields at once. For example, edit two fields and click **Save Record**. Only those two fields are updated.

5. The **Company Details** screen displays.

Note: The **Active** field on the Company Details screen denotes whether the Vendor/Client will show in the **Vendor/Customer** drop down on the **Add New Contract** screen.

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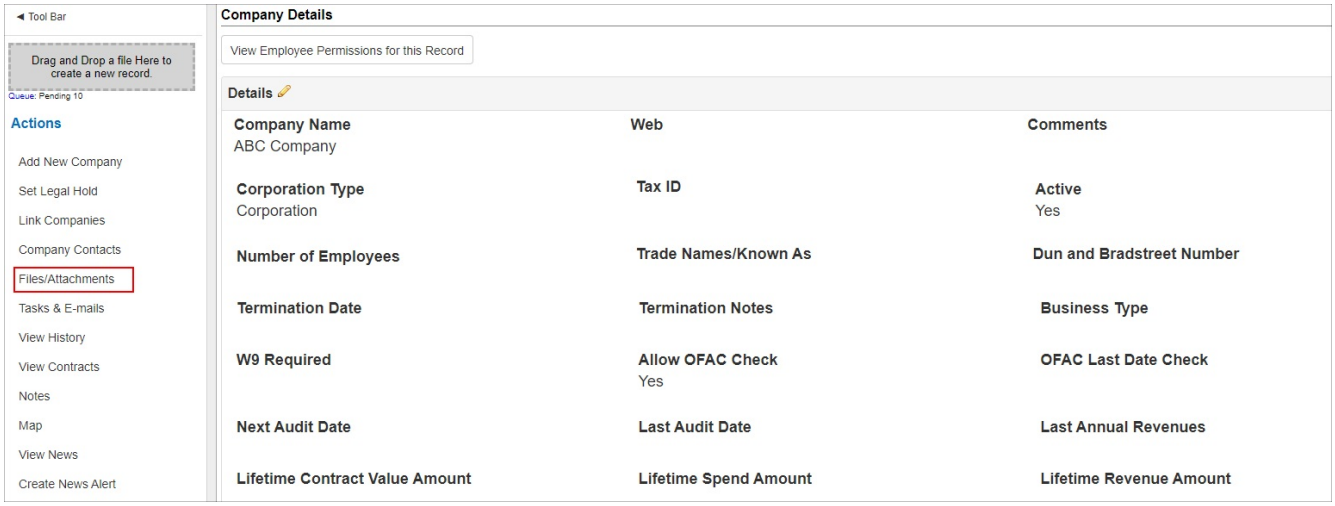
Attach a File to Company Details

Attach a File to Company Details

Vendor/Company Details: Attaching a File

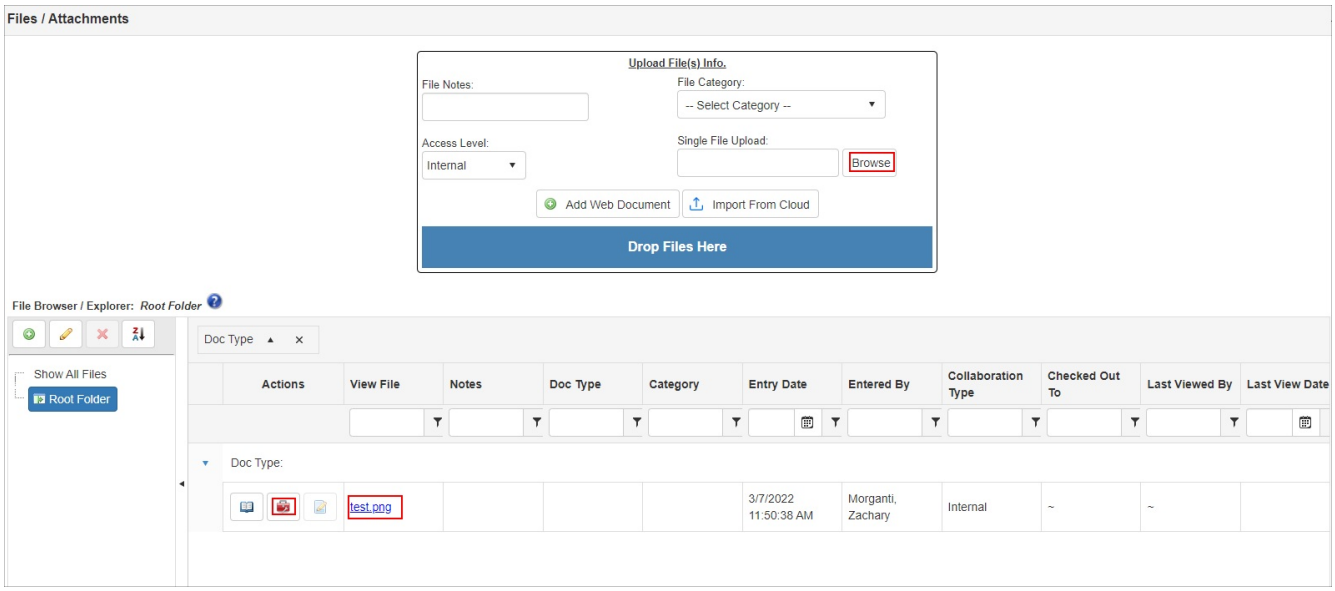
Contract Insight provides users with the ability to attach files, documents, and images to a company record.

1. Access the attachments section of the **Company Details** screen by clicking **Files/Attachments** on the side menu of any **Company Details** screen or scroll down the screen to the **Files/Attachments** area.



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2. Either method goes to the **Files/Attachments** section of the **Company Details** screen.



3. In that section, click **Browse**.

4. Search for the file to attach and select it. Users may also drag and drop files onto the blue **Drop Files Here** bar.

5. Add a description to the attachment in the **File Notes** text box (optional).

6. Save the changes.

7. The file is added to the **Files/Attachments** section of the **Contract Details** screen.

Note: After attaching and saving an attachment, do not click the browser's refresh button. Doing so repeats the last action of attaching the file without warning or notification.

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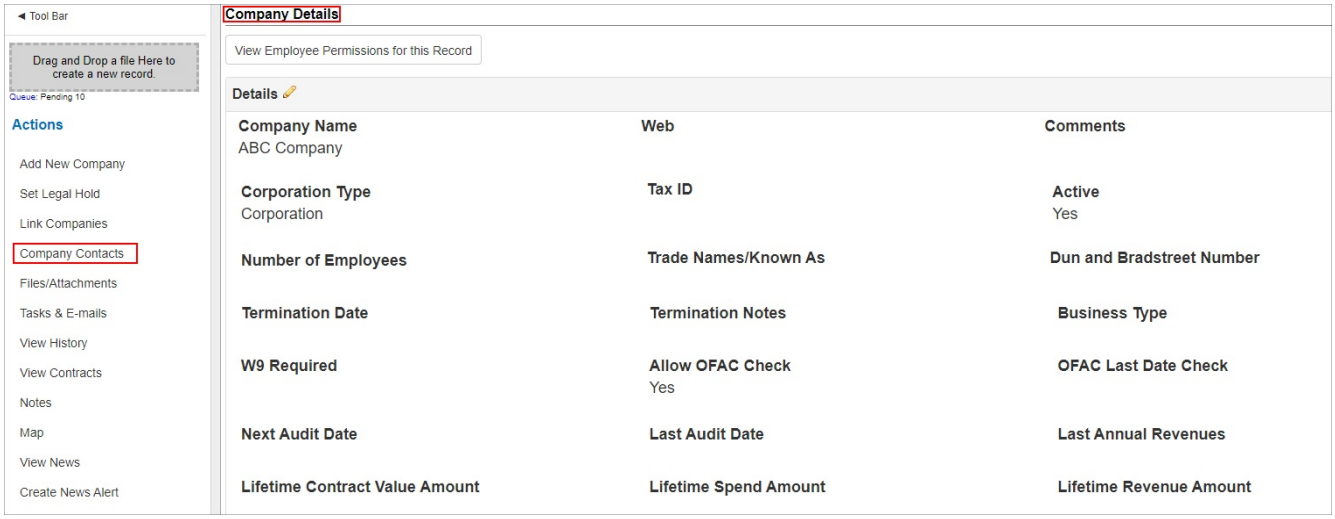
Vendor/Company Contacts

Vendor/Company Contacts

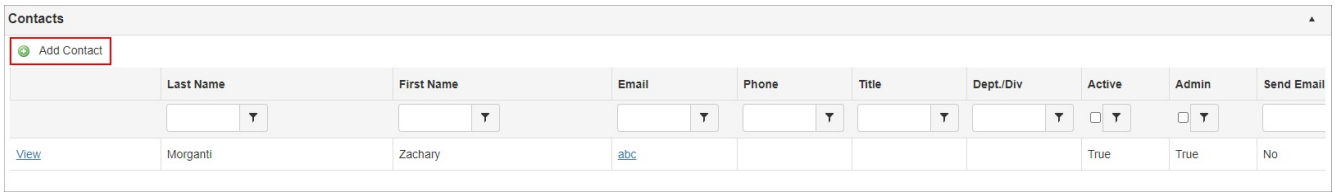
Vendor/Company Details: Adding, Viewing, and Editing Contacts

Contract Insight enables authorized users to add contacts for a company through the **Company Details** screen.

1. Click **Company Contacts** on the side menu of the **Company Details** screen or scroll to the area.



2. Either method goes to the **Contacts** section of the **Company Details** screen.

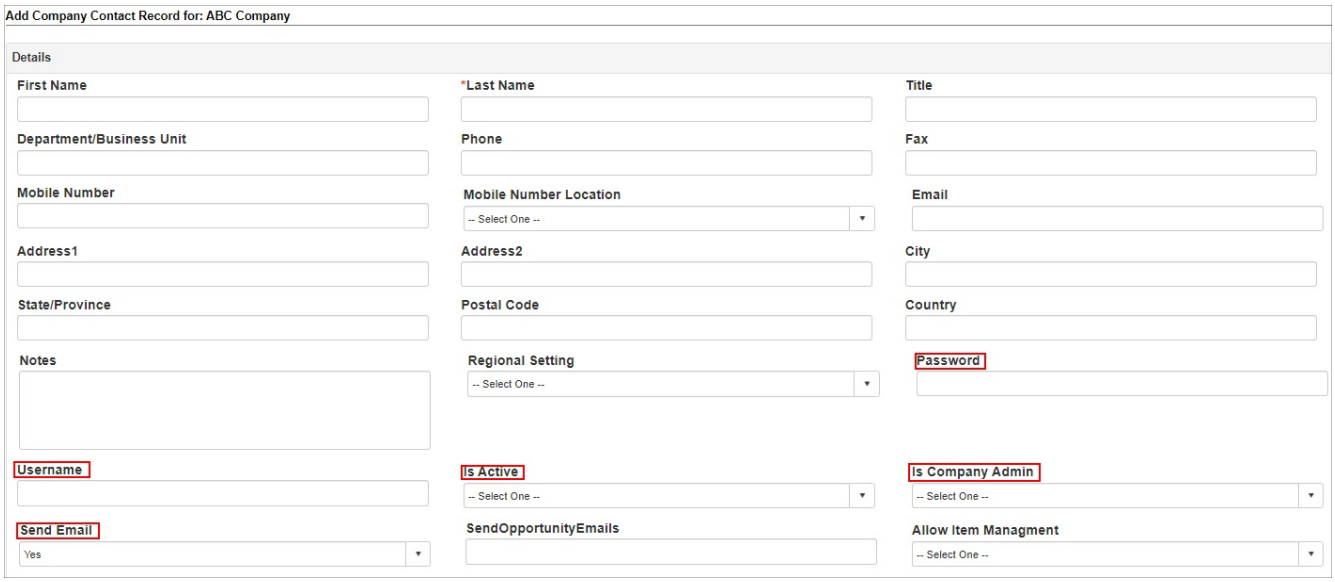


To Add a Contact for the Company

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3. Click **Add Contact** in the **Contacts** section.

4. The **Add Company Contact** screen displays.



Note: The following fields only apply for organizations that have purchase the optional **Vendor/Client Gateway** add-on module:

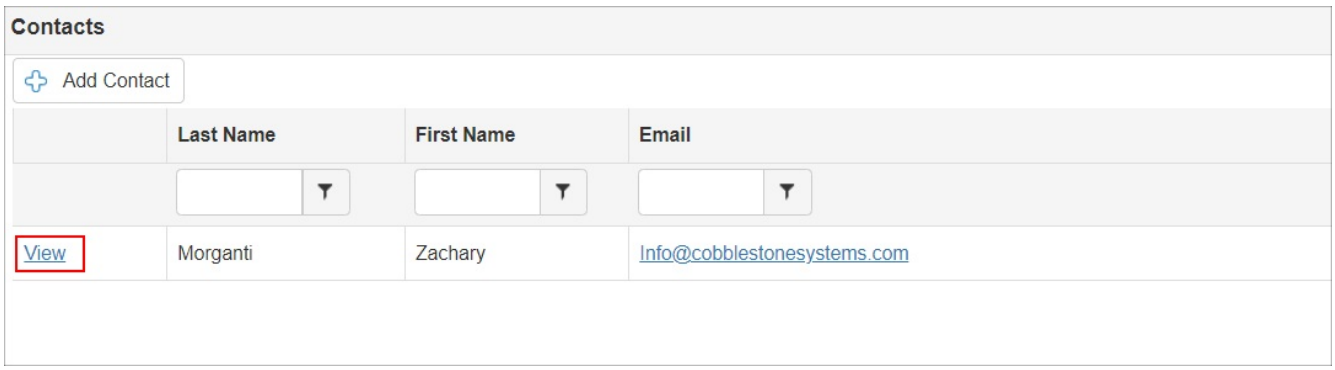
a. **Username & Password**: Each Company Contact will need his or her own **Username** and **Password** to be able to log-in to the Gateway.

b. **Is Active**: If the Company Contact is allowed to log-in to the **Vendor/Client Gateway**, the **Is Active** field needs to be set to **Yes** (in addition to having a username and password set for the contact).

c. **Is Company Admin**: If the Company Contact you are adding is the main point of contact for the Company, the **Is Company Admin** should be set to **Yes**. The Company Admin will be able to log-in to the **Vendor/Client Gateway** and will have the ability to manage (Add, Update, and Delete) additional users within his or her organization.

5. Enter all additional necessary/required information and click **Save & Continue** to save the new contact information (click **Return to Vendor Details** on the side menu to cancel the addition of the new contact).

6. The new contact is added to the **Contacts** section of the **Company Details** screen.

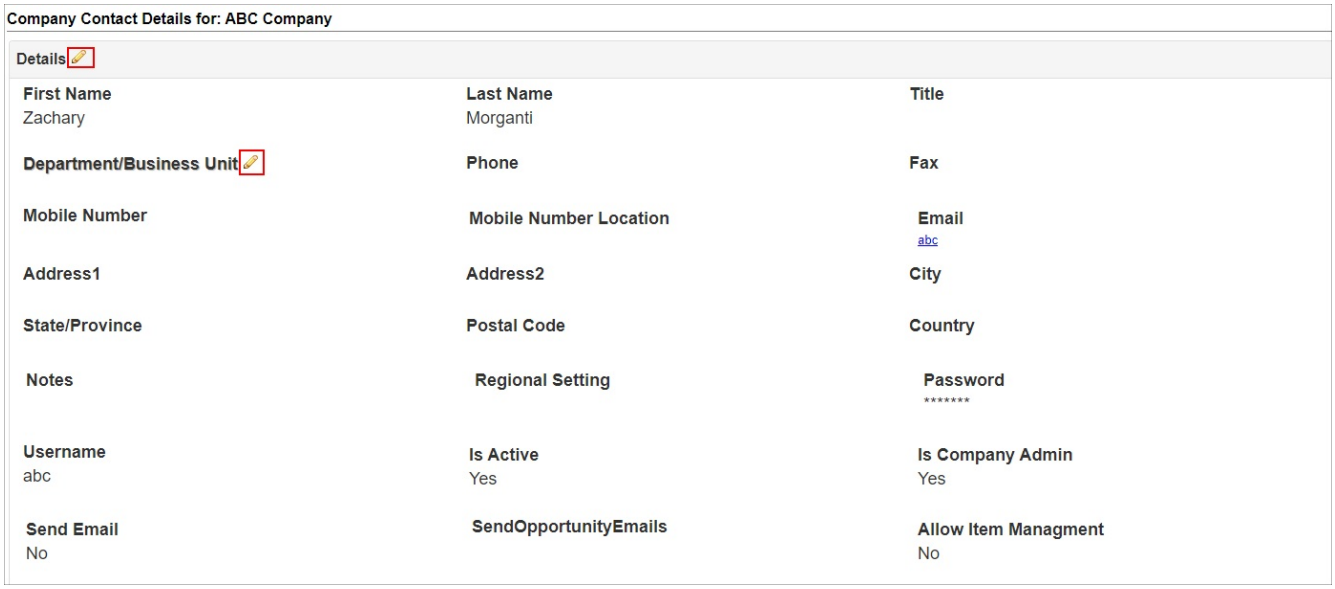


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Edit a Company Contact

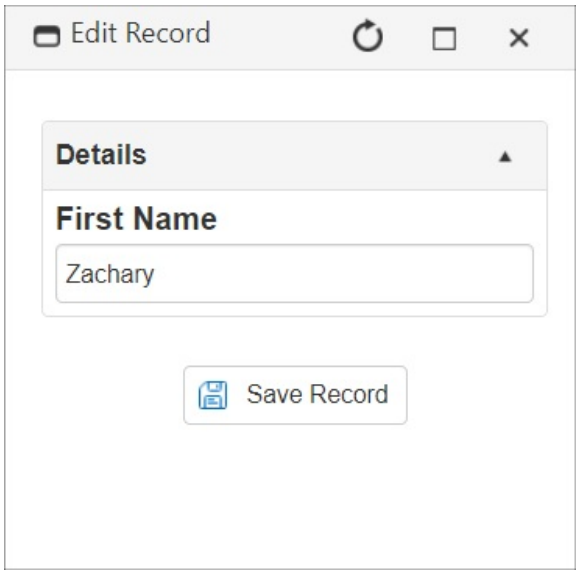
1. Click the **View** for the Company Contact line item to edit.

2. The **Company Contact Details** screen for the Contact displays.

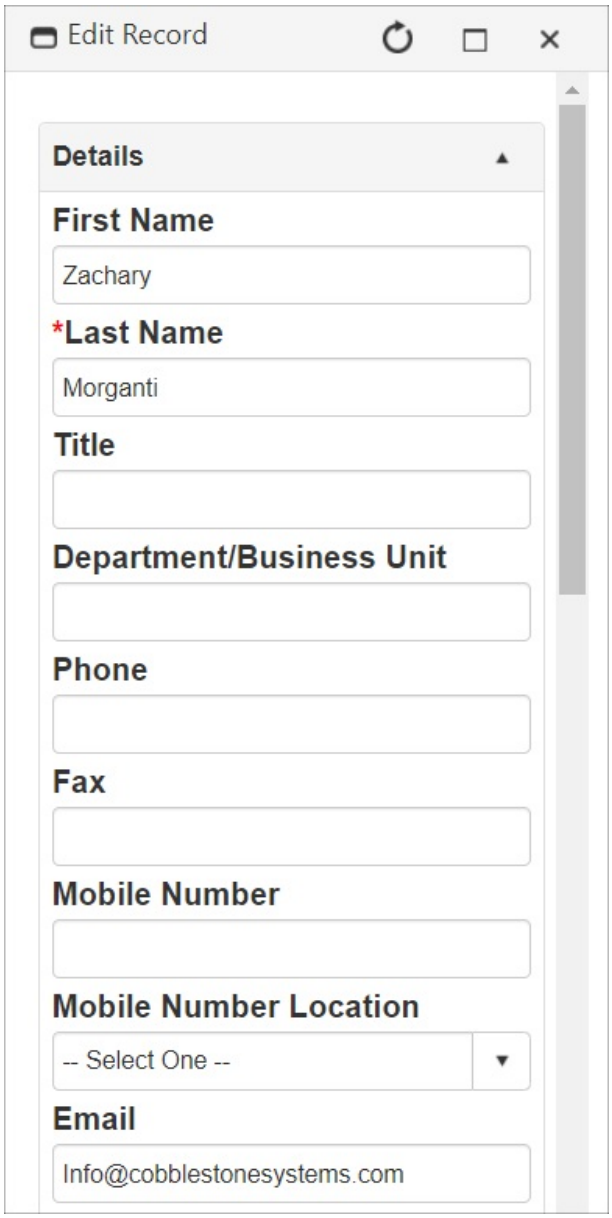


3. Click the **Pencil icon** ( ) that appears to the right of the field name on the Contact. To update multiple fields at one time, click the **Pencil icon** to the right of the **Field Group** name.

4. The **Edit Record** pop up screen displays where you can update the value of the field. When done making changes, click **Save Record** to save the updated value for the field (click the **X** in the upper right corner of the **Edit Record** pop up screen to cancel updating the field value). Click the **Pencil icon** to the right of the field group to edit multiple fields at once. For example, if you edit two fields and click **Save Record**, only those two fields are updated.



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Vendor/Company Details Notes

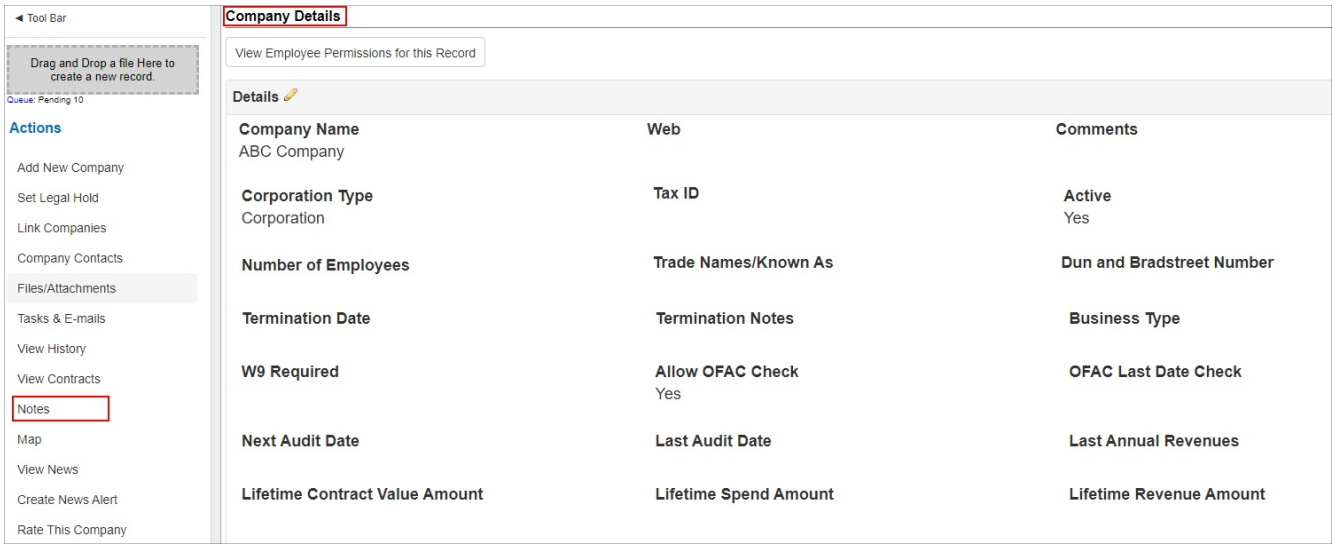
Vendor/Company Details Notes

Vendor/Company Details: Notes

Contract Insight provides users with the ability to add notes and comments for companies on the **Company Details** screen.

Add a Note

1. Access the company's notes section by either clicking **Notes** of the **Company Details** screen, or by scrolling down the page to that section.



2. Either method goes to the **Notes, Comments, Diary Log** section of the **Company Details** screen.



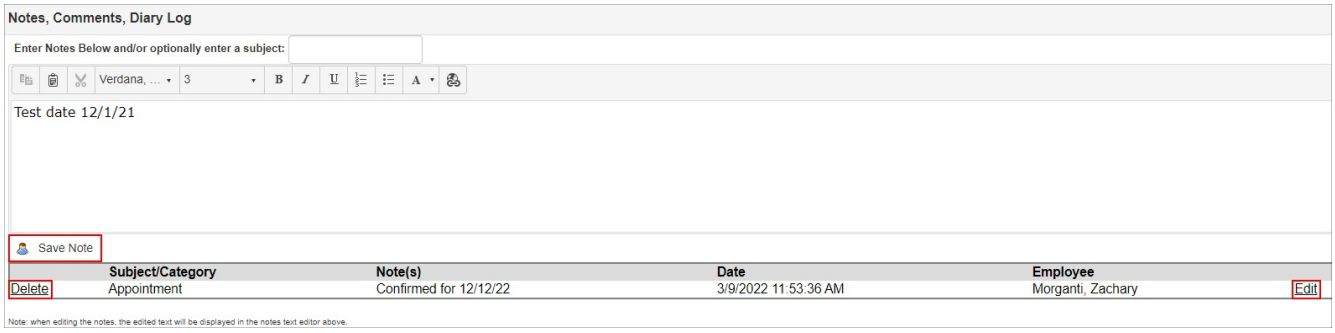
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3. To add a note to the company record, type the note into the Word-like text editor.

4. Click **Save Note**.

5. The note displays below the notes repository.

Edit/Delete a Note



Edit

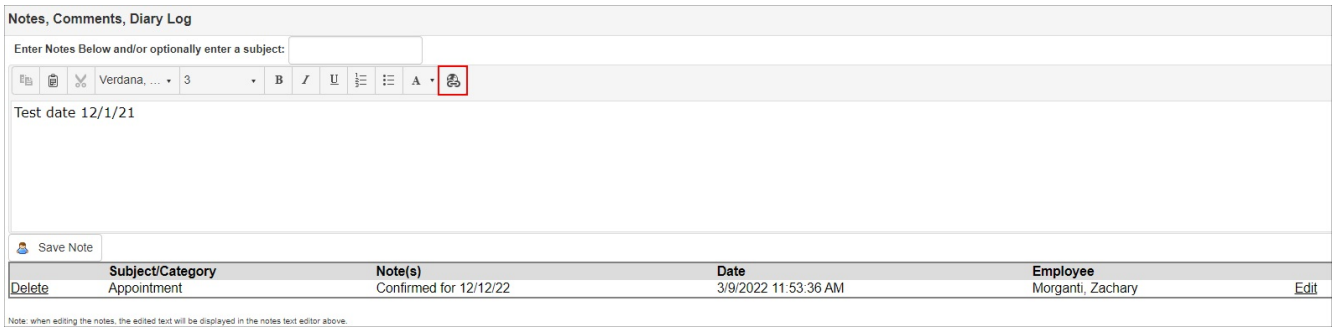
1. Click **Edit** next to the note to modify.
2. Perform any changes.
3. Click **Save Note**.

Delete

1. Click **Delete** for the line item to remove.
2. Confirm the removal.

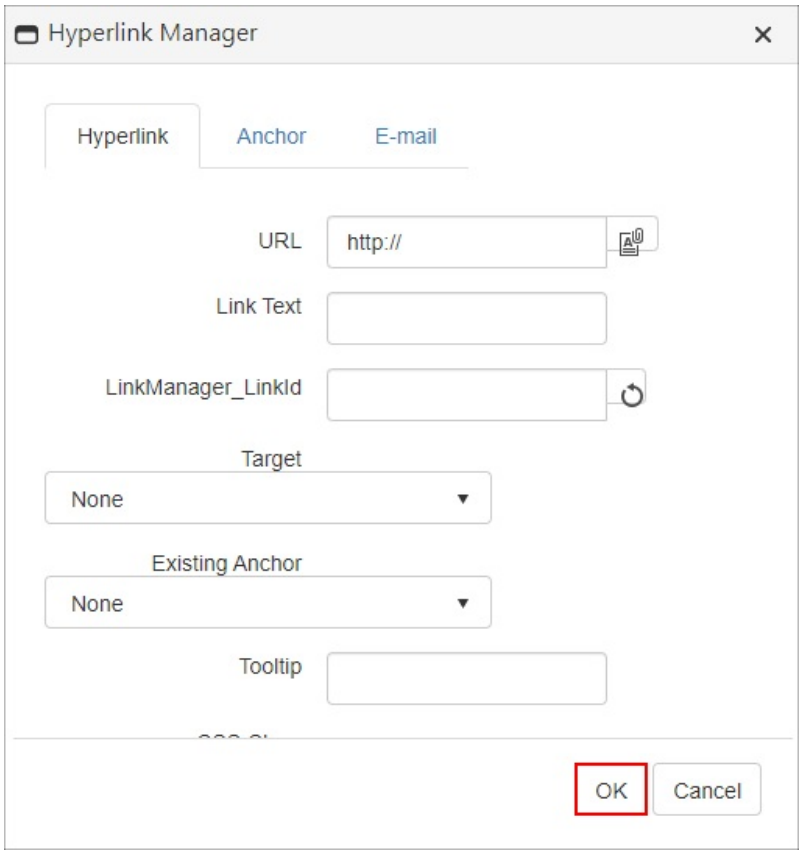
To Add a Hyperlink Note

1. Click the **Hyperlink Manager Icon** on the **Files Notes & Comments** section.

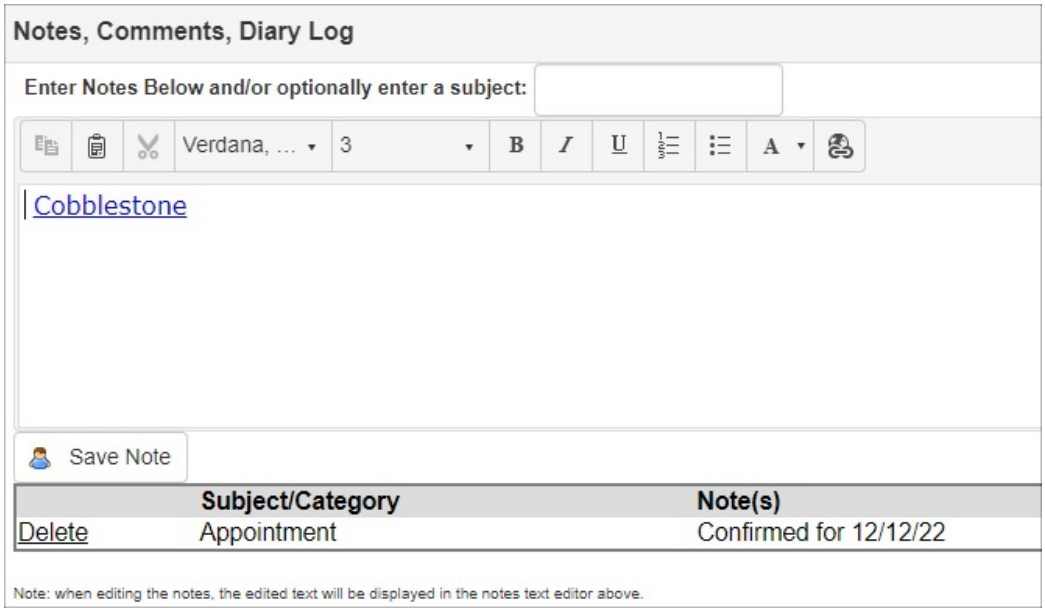


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2. Enter the web address, hyperlink text, and other required data. When finished, click **OK**.



3. The hyperlink text appears in the note. Click **Save Note** to save the hyperlink



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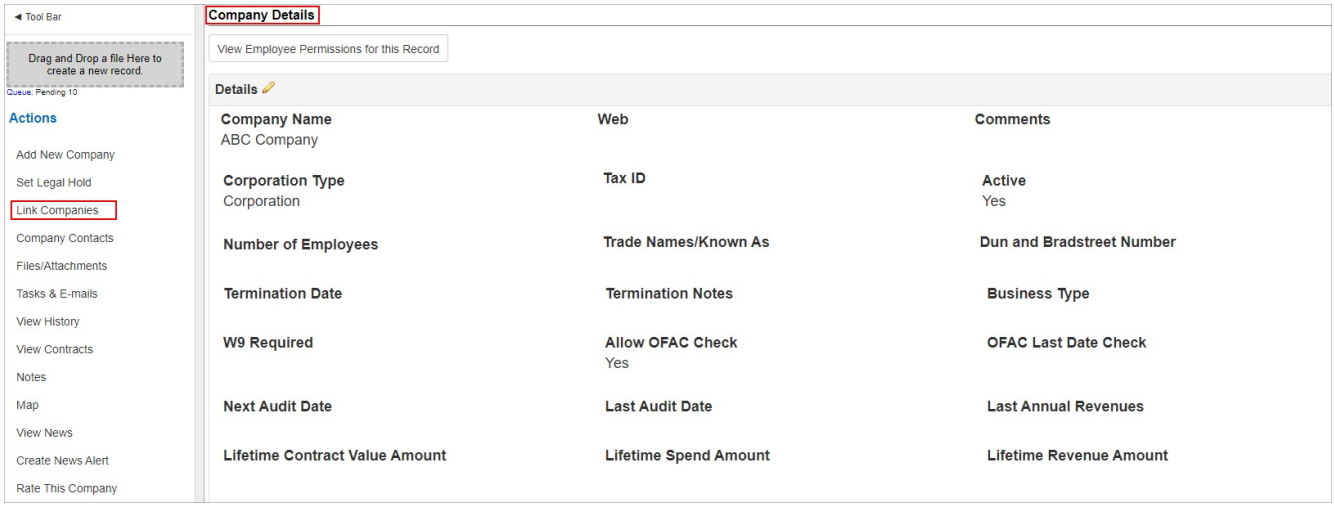
Link Vendor/Company Records

Link Vendor/Company Records

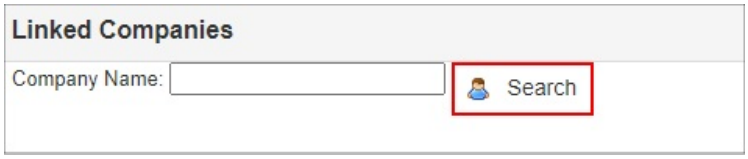
Vendor/Company Details: Link Records

Contract Insight enables authorized users to link companies to one another.

1. Click **Link Companies** on the side menu of the **Company Details** screen or scroll down the page to that area.



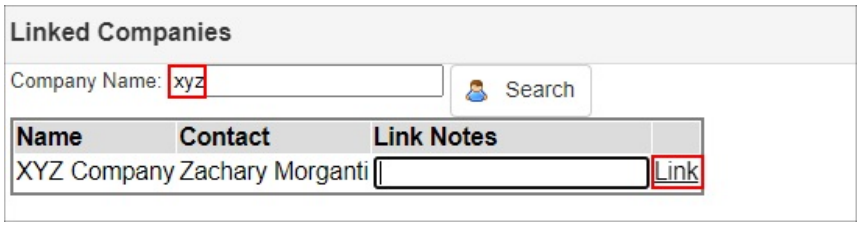
2. Either method goes to the **Linked Companies** section of the **Company Details** screen.



3. To link a company to the company being viewed, in the **Company Name** field, enter the company name to which a link is to be created and click **Search**.

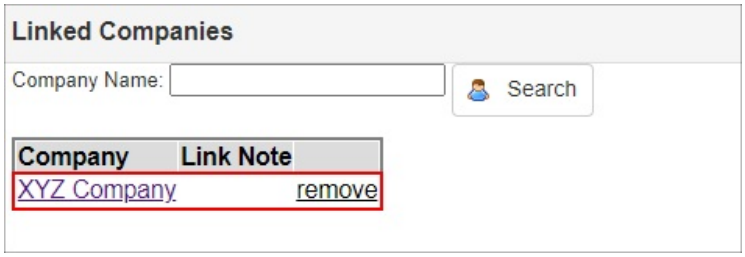
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Enter a keyword(s) in the text box and a list showing the company names related to the keyword opens.

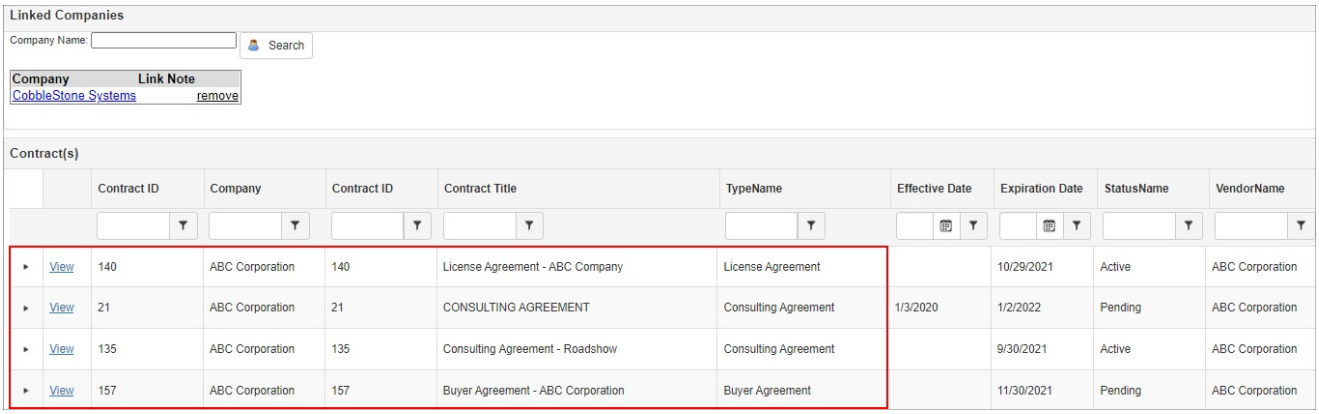


4. Enter any link notes into the text box under the **Link Notes** (optional) column and click **Link** for the company line item to link to the company being viewed.

5. The new company is added to the **Linked Companies** section.



Users may also view contracts associated with the vendor within Contract Insight.



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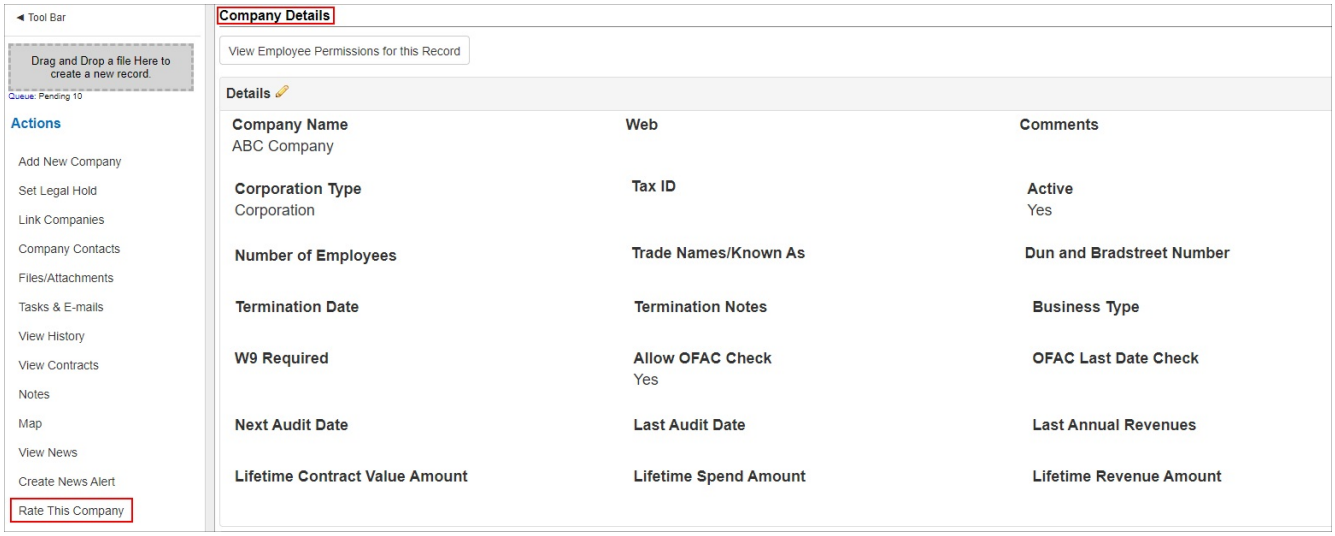
Vendor/Company Ratings & Scorecard

Vendor/Company Ratings & Scorecard

Vendor/Company Details: Ratings & Scorecard

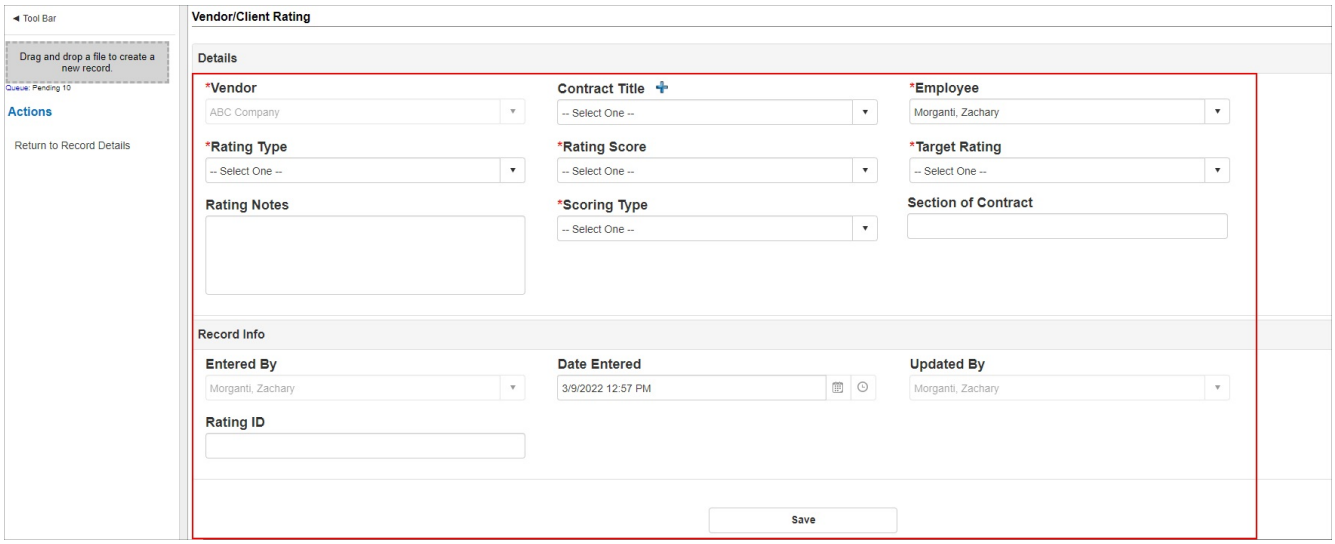
Contract Insight provides users with the ability to rate a company from the **Company Details** screen.

1. Click **Rate This Company** on the side menu under of the **Company Details** screen.



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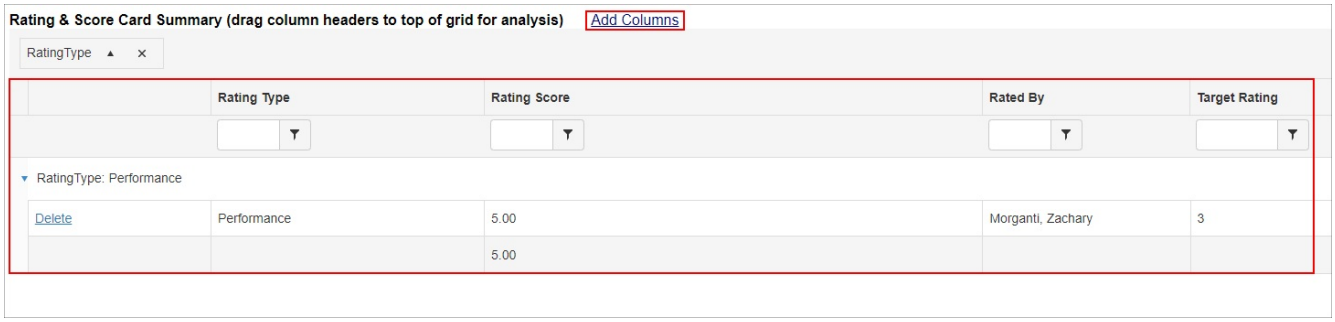
2. The **Vendor Client Rating** screen for the company to rate displays.



3. Enter the necessary information and click **Save**.

4. The **Rating and Score Card Summary** table at the bottom of the screen contains all of the previous ratings for the company - including the one you just saved.

5. Add/remove columns to/from the **Rating and Score Card Summary** table by clicking **Add Columns** at the top of the table.



Note: The values in the **Rating Type** drop down menu can be managed/edited by Application Administrators on the **Manage Fields** screen by selecting the **Vendor Contract Rating** table. Please see the Managing and Editing Fields Wiki page for more detailed information.

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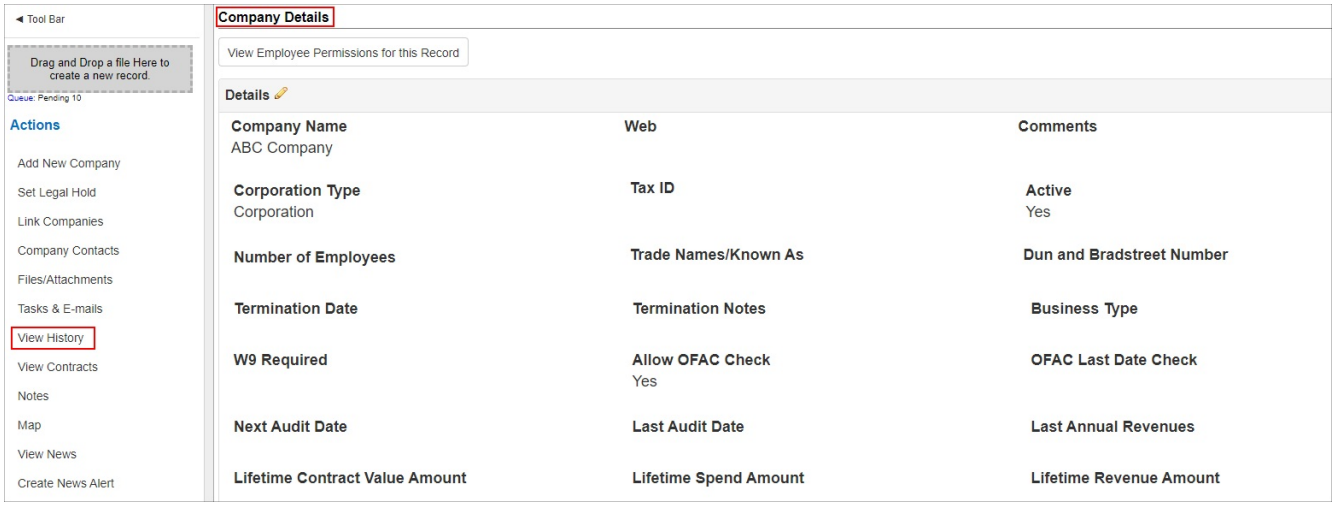
View Vendor/Company Record Activity

View Vendor/Company Record Activity

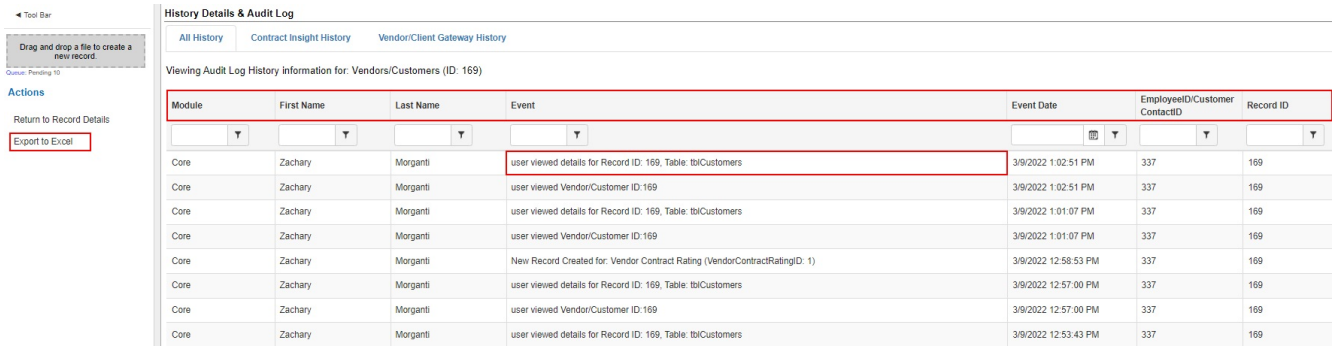
Vendor/Customer Details: View Record Activity

Contract Insight provides users with the ability to view the activity log for the company record.

1. Click **View History** on the side menu of the **Company Details** screen.



2. The company's **History Details & Audit Log** screen displays.



3. The **History Details & Audit Log** screen shows the event log for the company record including the employee's first and last name, the event that took place, the date the event took place, the employee's ID, the record ID, and the name of the table on which the event occurred.

4. The activity log can be exported to an Excel spreadsheet by clicking **Export to Excel** button on the side menu of the **History Details & Audit Log** screen.

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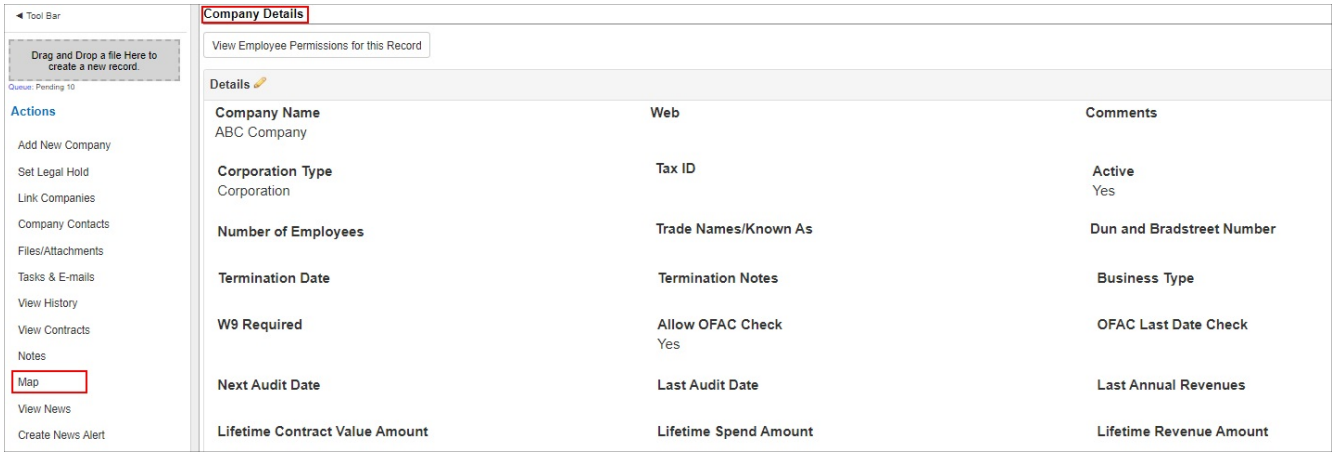
Map Vendor/Company Locations

Map Vendor/Company Location

Vendor/Company Details: Mapping a Location

Contract Insight allows users to view a company's location on a Google Maps screen.

1. Click **Map** on the side menu of the **Company Details** screen.



2. A new screen opens to the Google Maps website showing the location of the company based on the address information provided in Contract Insight.

Note: An address must be provided in the Company Details screen in Contract Insight in order to map the Vendor/Company location.

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Ad Hoc Report Wizard: Overview

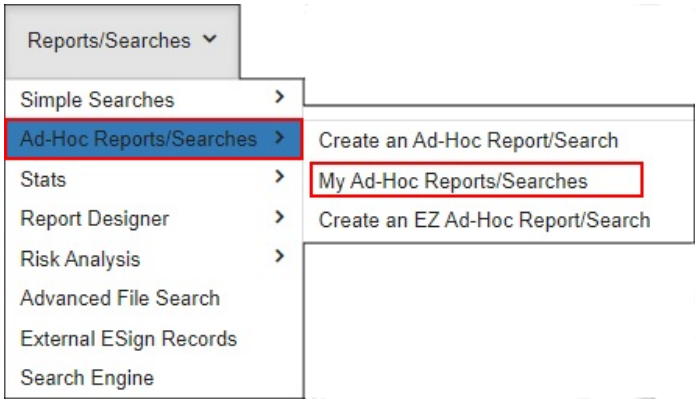
Ad-Hoc Report Wizard: Overview

Ad-Hoc Report Wizard: Overview

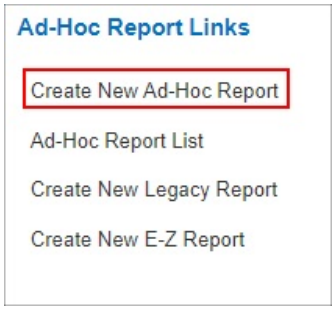
Advanced Ad-Hoc Reporting within Contract Insight is managed through the use of an easy to use on the menu list under **Ad-Hoc Report Wizard** header. Below is a detailed breakdown of the components of this wizard.

Accessing the Ad-Hoc Report Wizard

1. Navigate to **Reports/Searches - Ad-Hoc Reports/Searches - My Ad-Hoc Reports/Searches**.

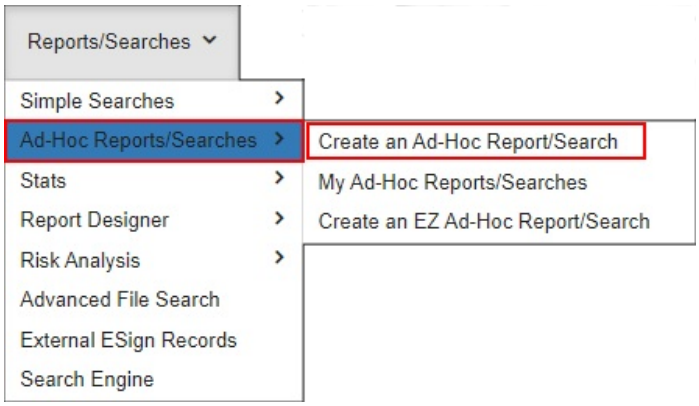


2. **My Ad-Hoc Report List** displays. On the side menu, click **Create New Legacy Report**.

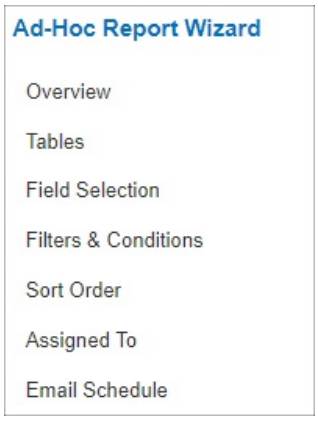


Alternatively, navigate to **Reports/Searches - Create an Ad-Hoc Reports/Search** to advance immediately to the **Overview** screen.

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Ad-Hoc Report Wizard



Building an Ad-hoc Report involved going through the 7-step Ad-hoc Report Wizard. The wizard displays on the side menu. Click each step as necessary (being sure to save all changes before moving on).

1. Overview: The initial page in the creation of an Ad-Hoc Report to provides overview information for the report.

2. **Tables:** The second page is used to select the tables used in the report.

3. Field Selection: The third page is used to specify/select what fields from the table(s) selected in step 2 are to be used for this report.

4. Filters & Conditions: The fourth page provides the ability for granular filtering and conditions to be applied to the report.

5. Sort Order: The fifth page in the wizard allows for one or more fields selected in step 3 to be assigned as a default or starting sort order.

6. Assigned To: The sixth page is used to decide which Employees/Users can be assigned to view/run this report.

7. Email Schedule: The final page in the wizard provides the ability to configure an e-mail schedule for sending out this report to the Employees/Users assigned.

Ad-Hoc Report Links

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Create New Ad Hoc Report: This link opens a blank wizard starting at step 1 - Overview & Tables for the creation of a new Ad-Hoc Report.

Ad Hoc Report List: This link goes back to the list of Ad-Hoc reports (showing those reports the Employee/User Account has access to view).

Create New Legacy Report: This link opens a blank wizard for a Legacy Ad-Hoc Report.

View/Run This Ad Hoc Report: This link opens the page that executes and displays the results of the Ad-Hoc Report currently being viewed.

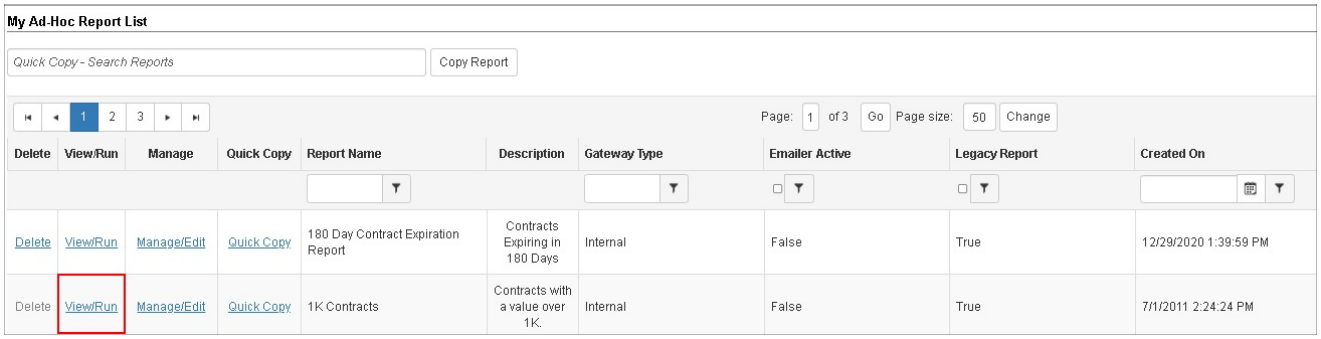
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Exporting Ad-Hoc Reports

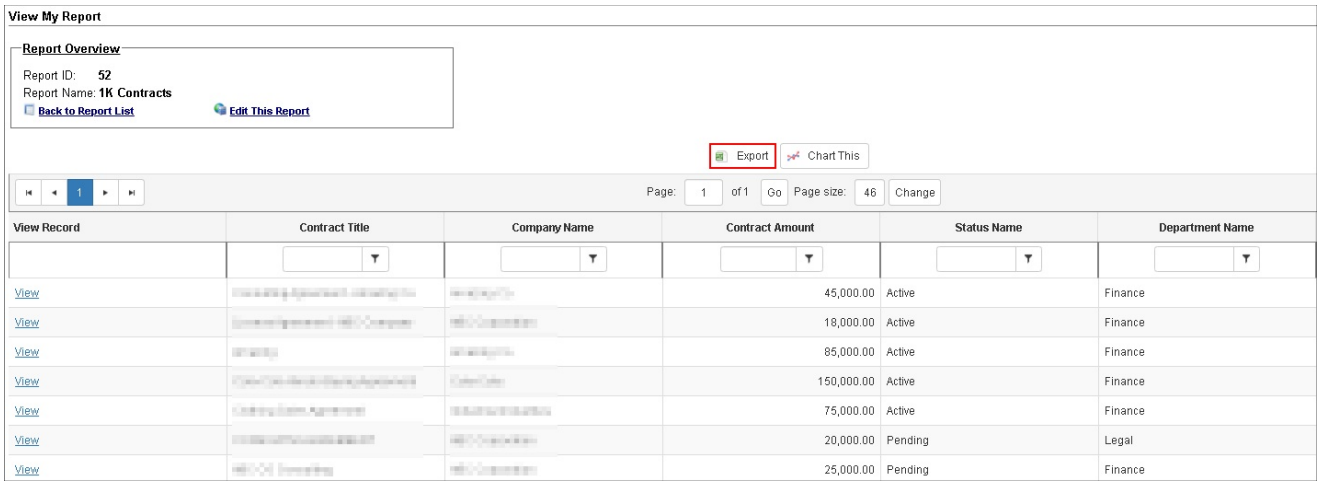
Exporting Ad-Hoc Reports

Ad-Hoc Report Wizard: Exporting Ad-Hoc Reports

To export an Ad-Hoc Report, first navigate to the desired report. Click the **Reports/Searches** dropdown, **Ad-Hoc Reports/Searches**, then **My Ad-Hoc Reports**. From here, click **View/Run** next to the report that is to be exported.



Next, click **Export** to export the results.

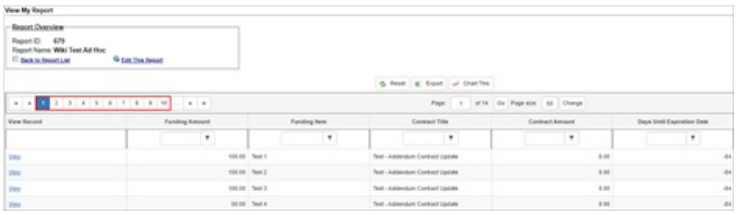


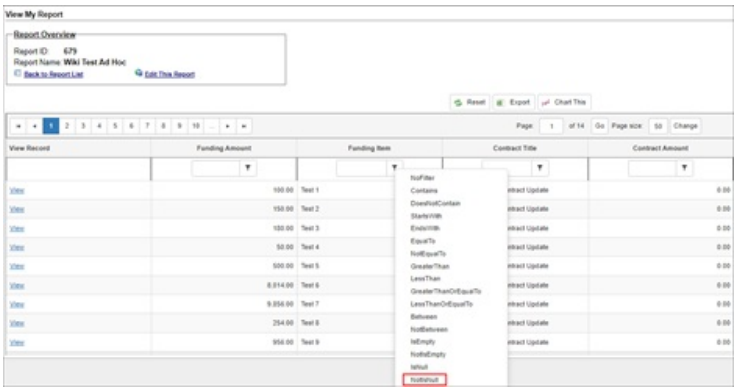
Export Sub-Table Information Only

Users may export Ad-Hoc Reports to show only sub-table information as long as filters are applied.

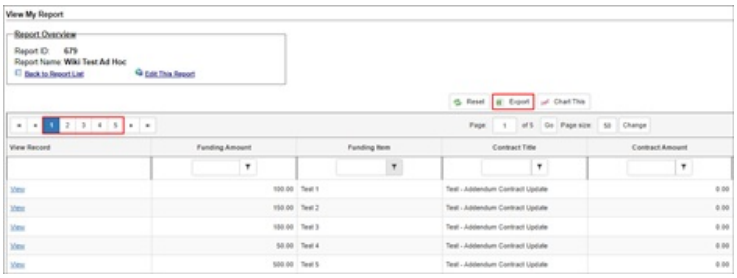
Click **View/Run** next to the desired Ad-Hoc Report. Then, use filters to reveal sub-table information. As shown below, without filters applied, there are 10 pages of Ad-Hoc Report results.

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With a budget sub-table, fields may be brought over in the Field Selection process to reflect a Funding Amount/Funding Item, as per the report above. From here, filters may be applied. For example, in the image above, the user may find where the **Funding Item** IsNotNull. Meaning, where the Funding Item is greater than 0 (when Funding Item information is present).



With filters applied, about half of the total results now appear, where Funding Item(s) exist. Users may now **Export** the search results. Since filters are applied to the sub-tables, only the relevant information will be exported, instead of seeing all results (the 5 pages will export instead of the 10 pages from the initial report's results).

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1. Report Manager: Overview Page

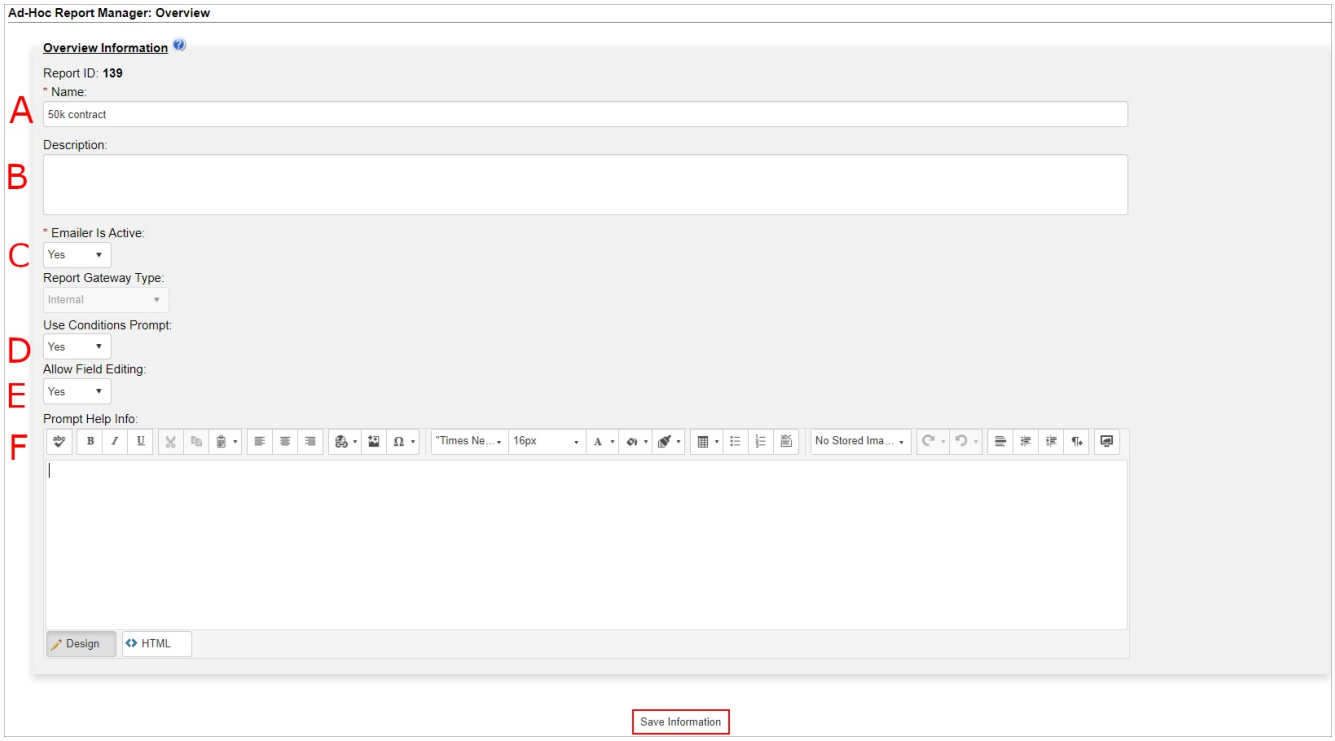
1. Report Manager: Overview Page

Ad-Hoc Report Wizard: Overview

The Overview is the initial page in the creation of an Ad-Hoc Report. It is used to provide overview information and what table(s) are to be used in the report.

Completing the Overview

1.The **Ad-Hoc Report Manager: Overview** screen displays. Enter the overview information for the new report.



A. Provide a **Name** for the report

B. Optionally, enter a **Description** for the report

Then set the following:

C. **Emailer is Active**: If you would like to set the report to send on an email out to certain users, set this to Yes.

D. **Use Conditions Prompt**: Enables a prompt to modify Filters/Conditions every time a report is run. For example, allowing a user to change a reporting looking for contract amounts over $50,000 to instead look for a different amount.

E. **Allow Field Editing**: Enables the ability to directly edit records that appear as results in the report. In the Field Selection step, you will have the option of enabling editing on a field-by-field basis.

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F. Optionally, enter **Prompt Help Info** to accompany your Conditions Prompt if any, then hit Save and Continue to move to the next step.

2. Click **Save and Continue**. If creating a new report, the Table Selection page displays. If editing an existing report, the Overview screen continues to display.

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2. Table Selection

2. Table Selection

Ad-Hoc Report Wizard: Tables

When creating a new Ad-Hoc Report, the first key component that is necessary is to specify the **primary table/area** that the ad-hoc report is using.

Primary Table

1. When creating a new report, the **Ad-Hoc Report Manager: Tables** screen displays immediately after clicking **Save & Continue** on the **Overview** page. If editing an existing report, click **Tables** on the side menu.

2. Select the Primary Table for the report from the pick-list that will be involved in the report.



Additional Sub/Linked Tables

1. To add any of the additional related/sub/linked tables to the ad-hoc report, click **Click to Add**.

2. The **Add Ad-Hoc Sub Table** pop-up window displays. Open the pick-list, select the desired table, and click **Add Sub Table**.

3. Repeat Selection of additional tables as necessary.

4. For each sub/linked table, optionally, click **Choose** to select a colour for the rows with the table's data on the run report.



5. To remove a sub/linked table, click the **red X icon** ( ).

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Once the all of the desired tables have been selected, click **Continue to Field Selection** at the bottom of the page to save all the information and move on to the next in the Ad-Hoc Report Wizard, **Field Selection**. If editing an existing report, click **Field Selection** on the side menu to navigate to that screen.

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3. Field Selection

3. Field Selection

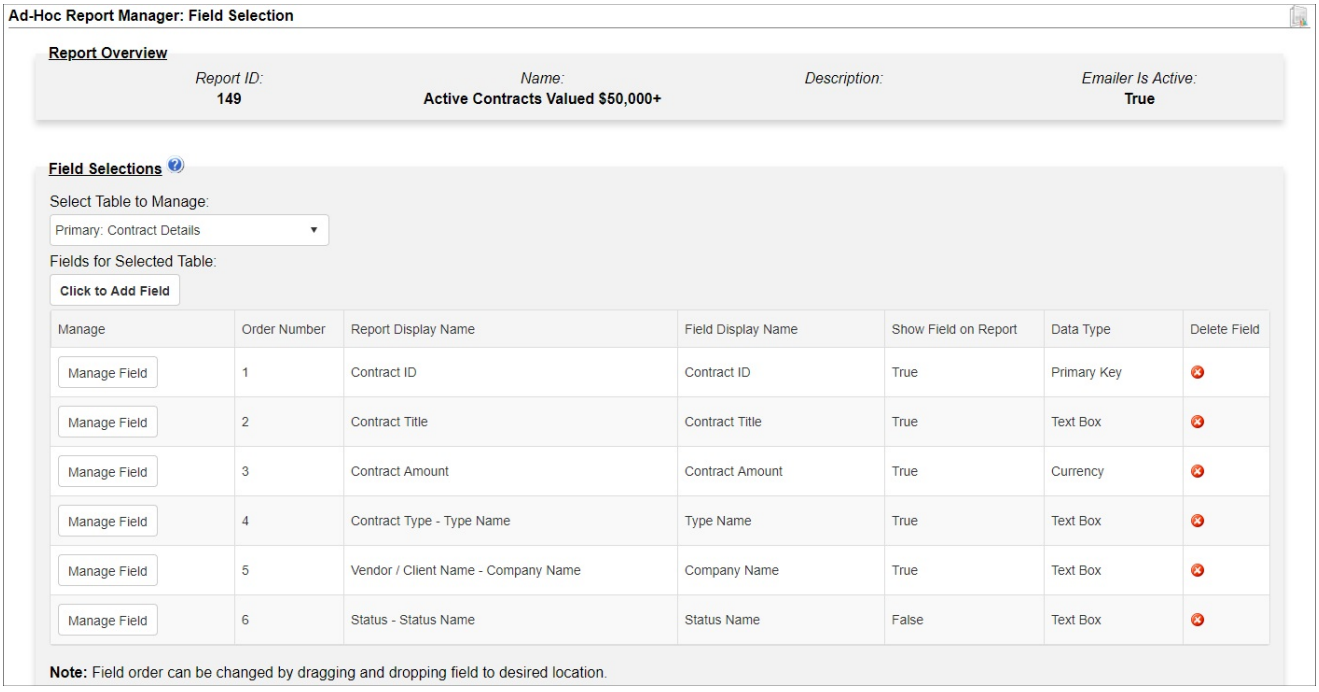
Ad-Hoc Report Wizard: Field Selection

The next step in the wizard is used to specify/select what fields from the table(s) selected in step 2 are used for this report.

Selecting Fields

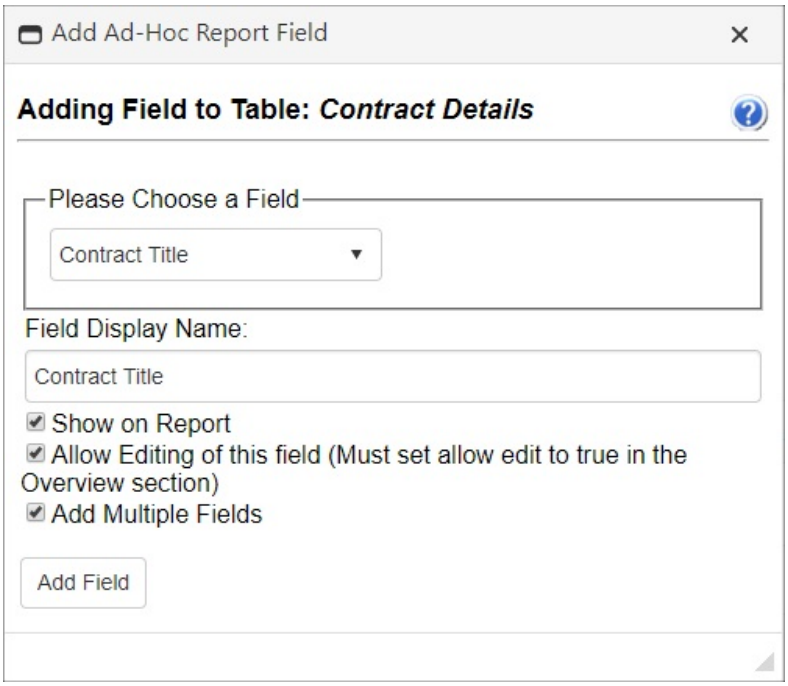
1. If building a new report, the **Ad-Hoc Report Manager: Field Selection** page displays If editing an existing report, on the side menu, Click **Field Selection**.

2. The **Ad-Hoc Report manager: Field Selection** screen displays. First select the table from which to select fields. All tables selected on the **Tables** screen are available. Open the Select Table to Manage pick-list and select a table. From this page, fields are assigned to the report, either to use them as column headers and/or to build a search/filter around them. Click **Click to Add Field** to begin adding fields to the Report.



3. A pop-up window displays. Select the field from the available pick-list. The **Field Display Name** is populated automatically. Edit it as necessary.

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4. Mark or remove the mark for the options as necessary:

Show on Report: If checked off will cause the selected field to be displayed as a Column on the final Report. Can be unchecked to include a field in Filters/Conditions without having it be a Column.

Allow Editing of this field: If **Allow Field Editing** was enabled in Step 1, this will enable editing of the selected field on any Records that appear in the final Report that the User has Edit permissions for.

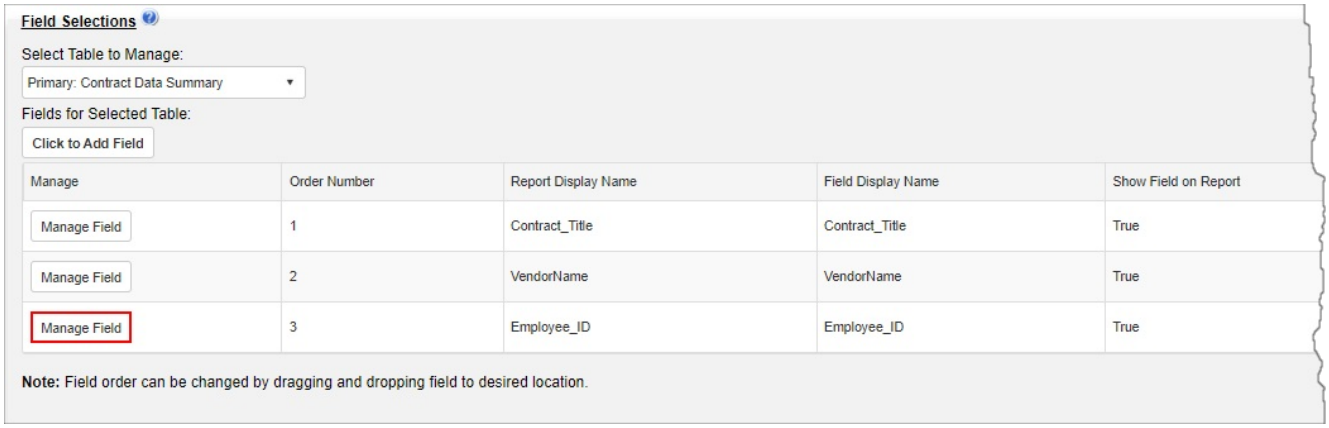
Add Multiple Fields: If marked, the Add Field popup window is stopped from closing after adding a field and allows multiple fields from the same table to be added back to back.

5. Click **Add Field**.

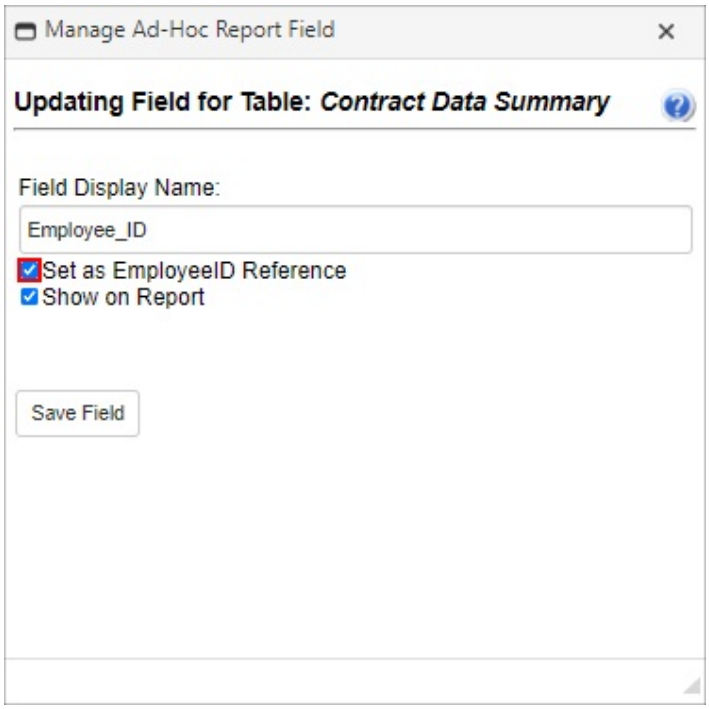
6. Information for fields added to the Report is displayed as each field is added. Click **Manage Field** to adjust settings for each.

7. Select a new table and repeat for fields on other tables.

Note: If working with a DB View as a parent "table", Mark **Set as Reference** for VendorID name or EmployeeID to apply a filter and only show records assigned to that counterparty or employee as applicable.



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4. Filters and Conditions

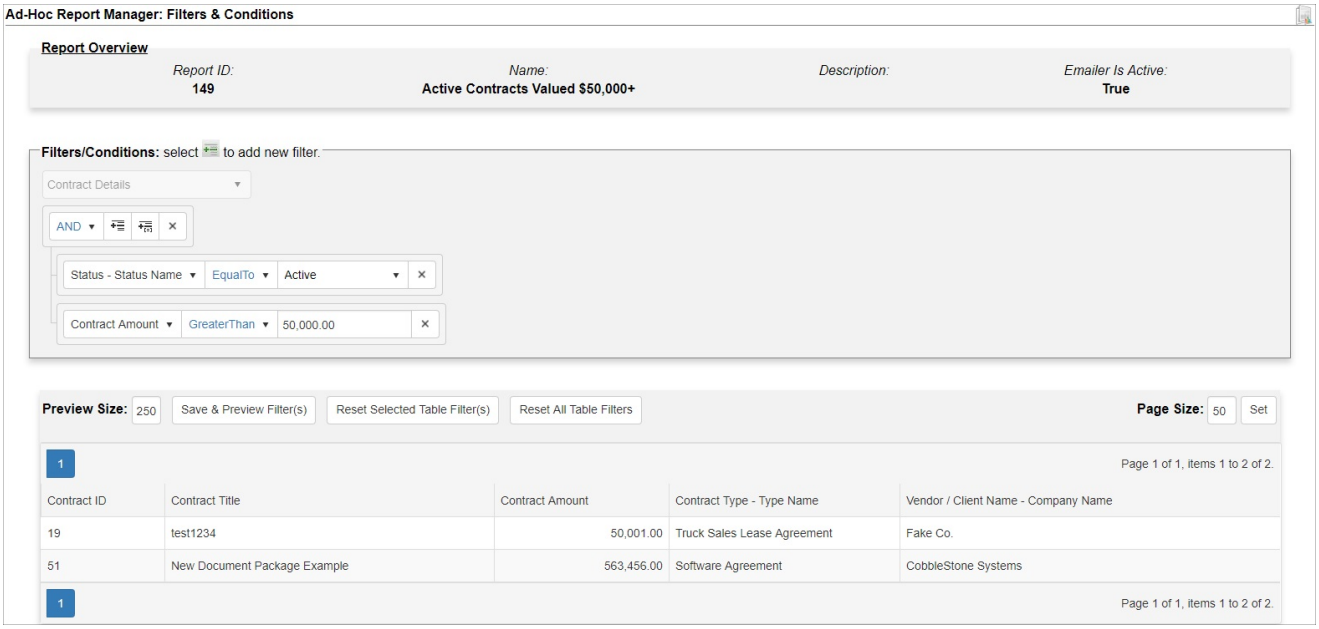
Filters & Conditions

Ad-Hoc Wizard: Filters & Conditions

The third step in the wizard provides the ability for granular filtering and conditions to be applied to the report.

Setting Filters/Conditions

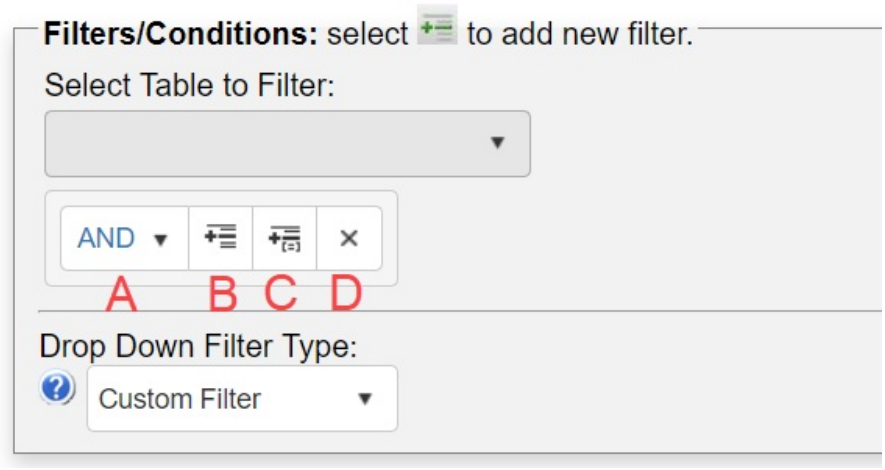
1. On the side menu, click **Filters/Conditions**.



In this step, the Filters/Conditions that comprise your report must be created.

To better understand how to use the filters/conditions functionality, lets breakdown the components. In the picture below each of the components of the filtering control are marked with a letter.

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Filtering Control

A: **And/Or Selector:** Used to determine if a new expression is being added as an **AND** or **OR** condition

B: **Add New Filter Expression:** Adds a new filter expression to the list of conditions (takes into consideration the **And/Or Selector**)

C: **Add Expression Group:** Adds a new sub-grouping of expressions to be used in complex conditions. (takes into consideration the **And/Or Selector** between groups)

D: **Remove Filter Item:** Removes the filter/condition from the list of applied filters and conditions

2. Click the **Add New Expression icon** ( ) to create a new Expression. Each is comprised of three parts:

- A field

- A filter statement such as Contains, Greater Than, Less Than, etc.

- A value against which the field will be compared.

3. If any of your filters/conditions are on a drop down menu, you can select Picklist Filter in the **Drop Down Filter Type** to select from one of the field's drop down values instead of typing it in.

4. Add as many of these Expressions as needed to build the report.

5. Click **Save & Preview**. Records are displayed in the Preview section that meet the requirements of the applied filters.

6. Up to 250 Records will be shown on up to 50 pages. Use **Preview Size** and **Page Size** settings to alter those counts.

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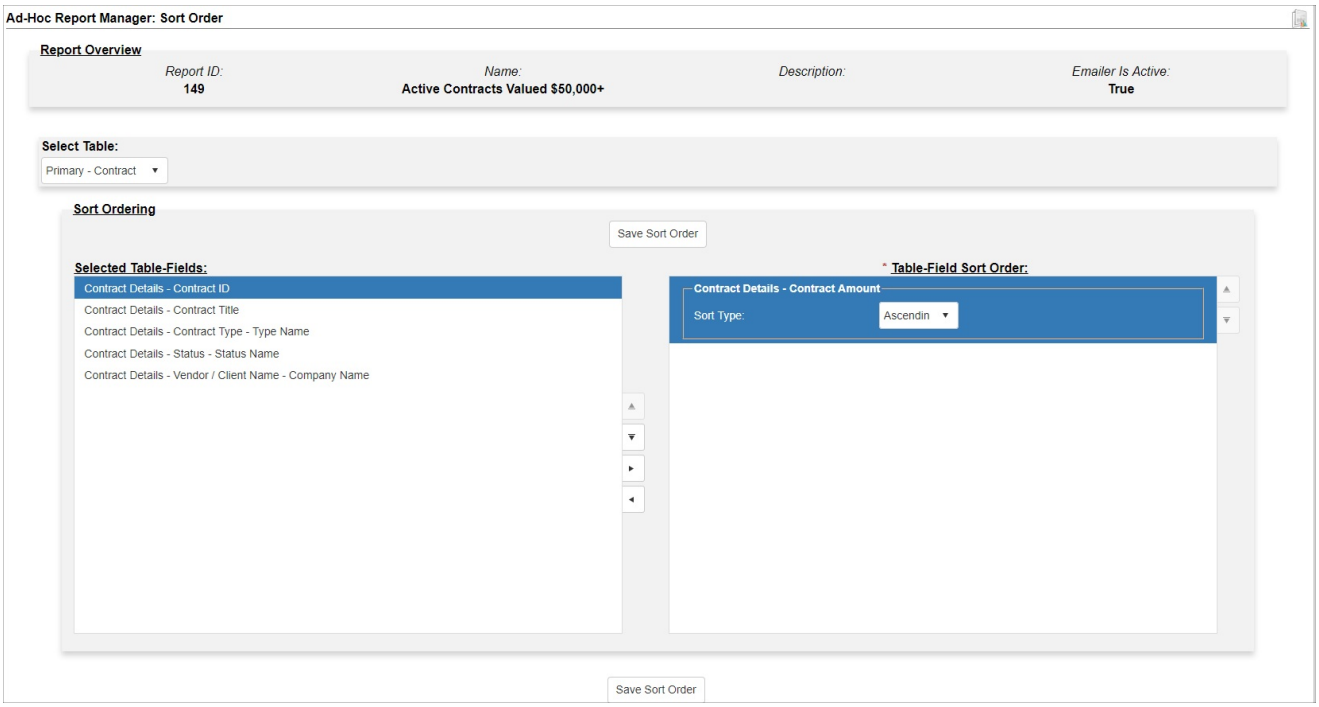
5. Sort Order

Sort Order

Ad-Hoc Report Wizard: Sort Order

The next step, optionally, is setting the field sort order.

1.On the side menu, click **Sort By**. The **Ad-Hoc Report Manager: Sort Order** screen displays.



This page can be used to set the Sort Order for the Report.

2.Select a field from the left column and either drag it to the right column or use the arrows to move it to the right.

3.Select Ascending or Descending order for the Sort.

4.Multiple fields can be assigned to the Sort Order, however, the first one is prioritized.

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6. Assigned To

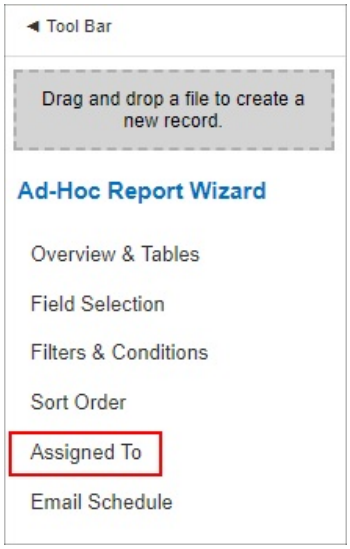
Assigned To

Ad-Hoc Report Wizard: Assigned To

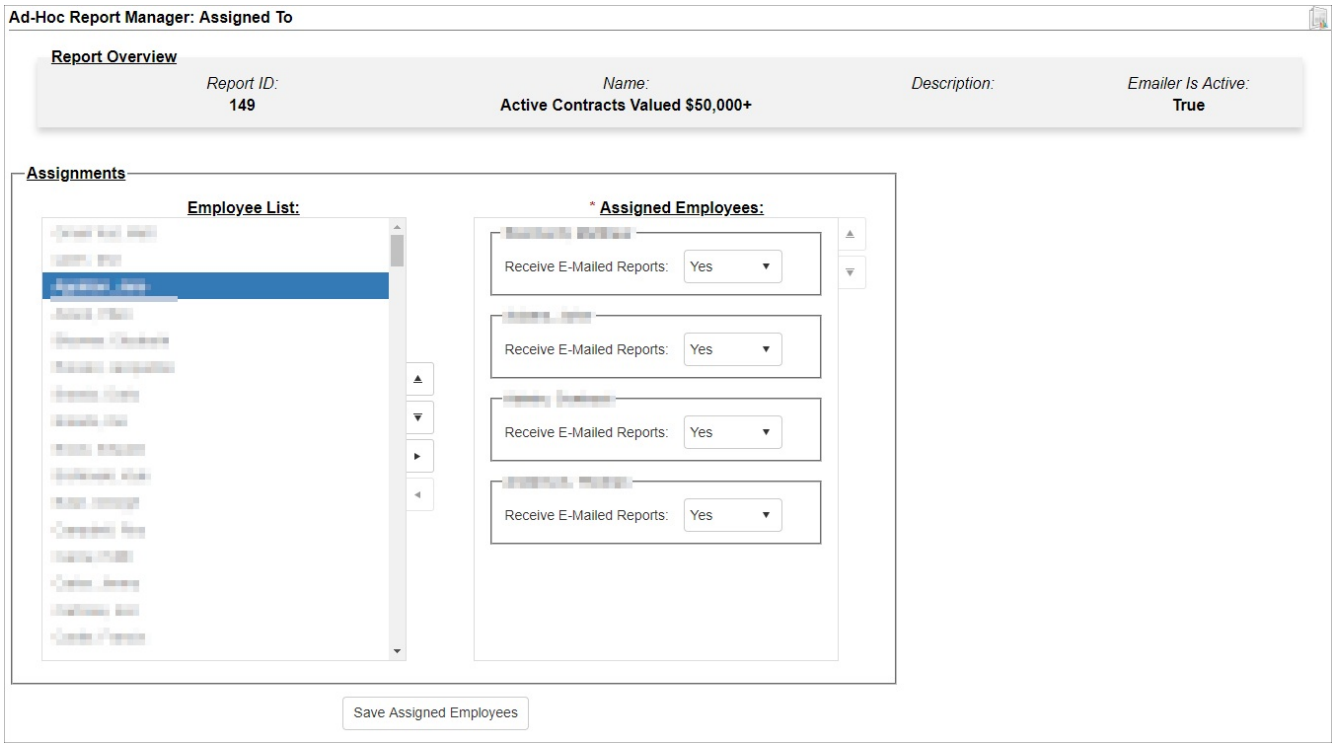
This step in the wizard is used to decide which Employees/Users are assigned to view/run this report.

Employee Assignment Management

1.On the side menu, click **Assigned To**.



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Ad-hoc Reports must be assigned to non-Administrator users for those users to have access to them.

2.Assign the employees who need access to the Report by either dragging and dropping their names to the **Assigned Employee** column or by using the arrows.

3.Each Employee has a **Receive E-Mailed Report** pick-list. All users who have this set to Yes will receive a copy of the emailed report if this feature has been enabled.

Bulk Assigning Ad-Hoc Reports

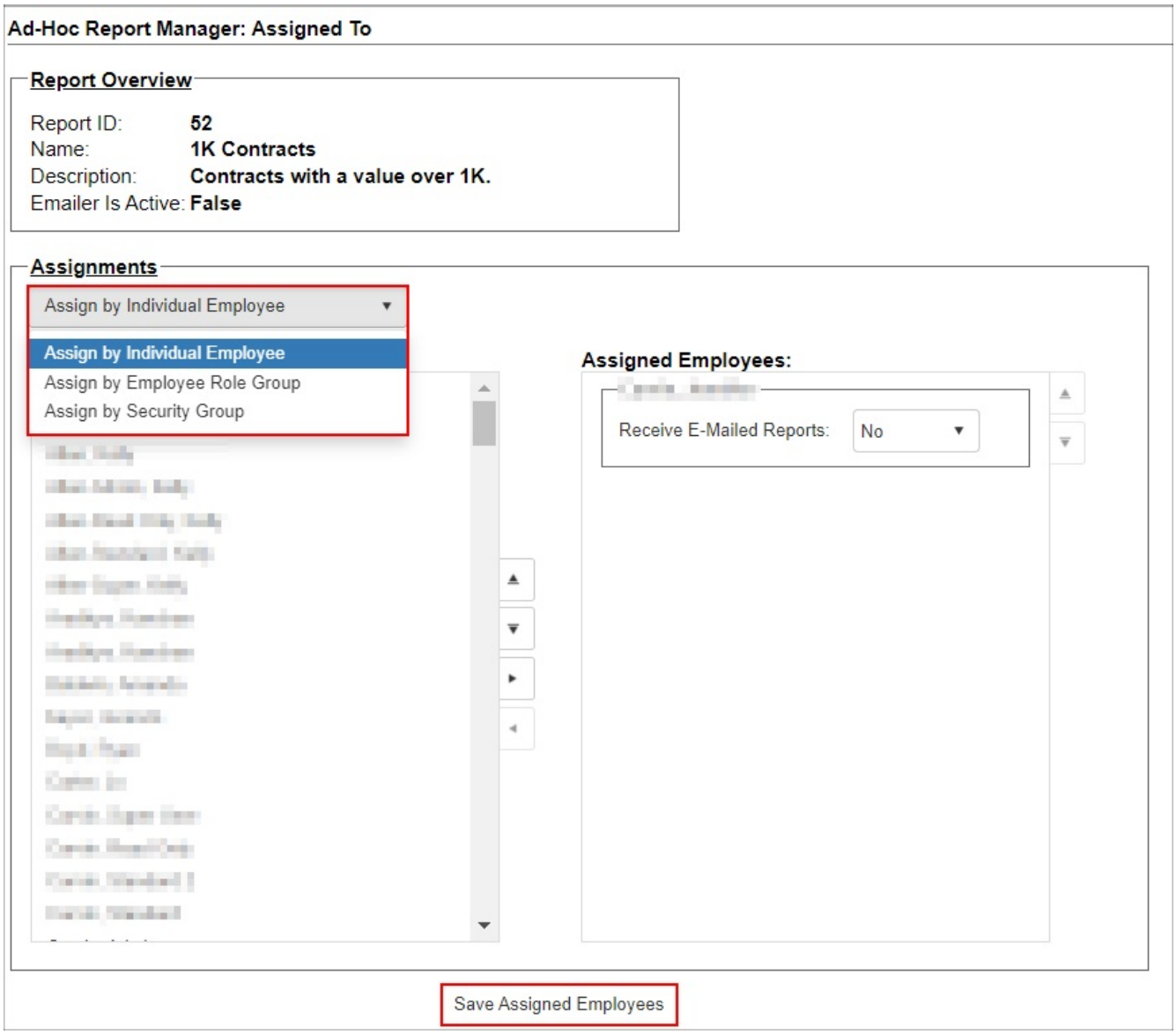
System Administrators have the ability to bulk-assign Ad-hoc reports to an employee directly on the Employee Details page.

1. After an employee has been added, scroll down to the **Assigned Ad Hoc Reports** section.

2. Use the necessary arrows to assign or deselect an Ad-hoc report to/from an employee. If assigning to deselecting in bulk, hold the CTRL key to select multiple Ad-hoc reports and use the necessary arrows to make the desired moves.

3. System Administrators may also assign by Employee Role/Group or Security Group. Select the desired Assign To method, using the arrows to assign/un-assign as necessary.

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7. Email Schedule

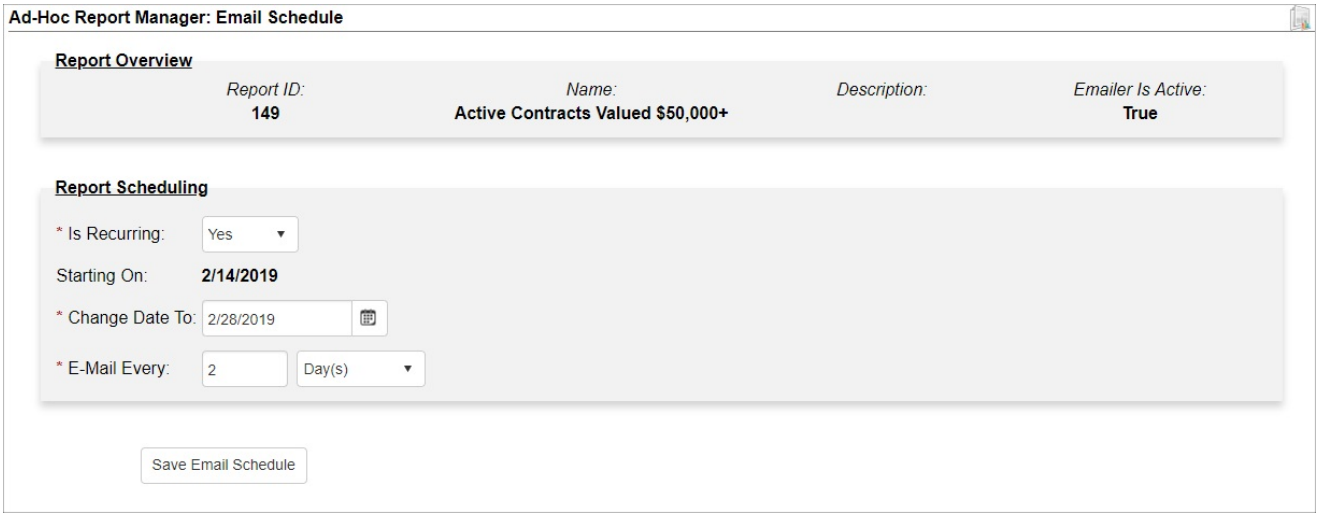
Email Schedule

Ad-Hoc Report Wizard: Email Schedule

The last step in the wizard provides the ability to configure an e-mail schedule for sending out this report to the Employees/Users assigned.

Recurring Email Schedule

1.On the side menu, click **Email Schedule**.



An email schedule can be set for the report from this page, however **Emailer is Active** must have been enabled in the Overview to make use of this feature.

2.Set **Is Recurring** to Yes to have the report email on a recurring basis. Set it to No to have it send only once.

3.Set **the Starting On** date to set the date the Report will begin to be emailed.

4.Set **E-Mail Every** if the Report is recurring. Using the box and pick-list, a schedule of however many Days/Weeks/Months/Years for the email schedule.

5. Click **Save Email Schedule**.

Single/One-Off Email

For one-off emailing of reports, mark Is Recurring as No, enter the date on which the report is to be mailed, and click **Save Email Schedule**.

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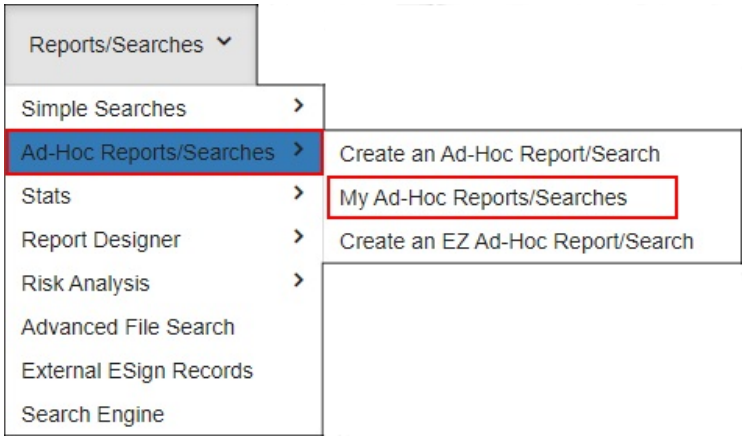
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8. View/Run Ad-Hoc Report

View/Run Ad-Hoc Report

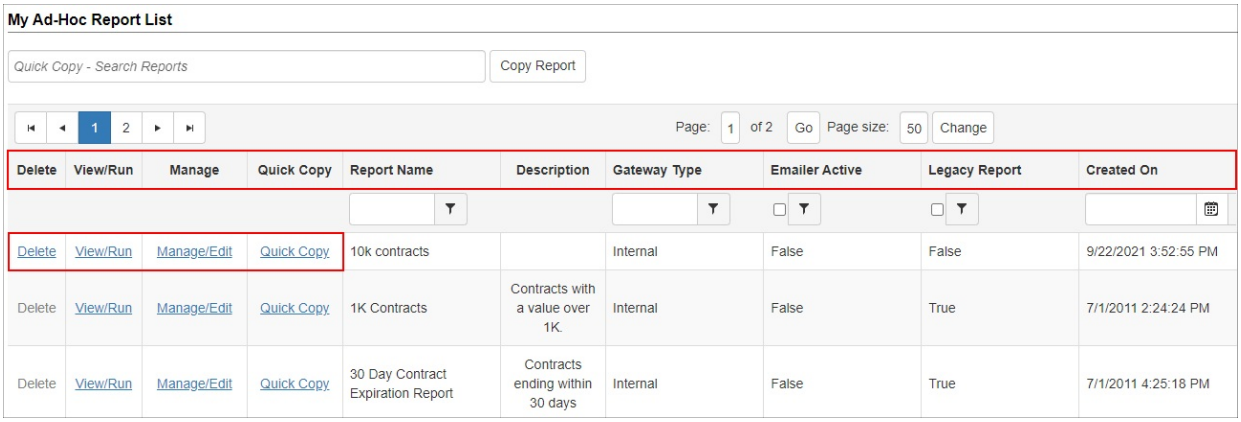
Ad-Hoc Report Wizard: Viewing & Running

To view a list of all Ad-Hoc reports to which you have access, navigate to **Reports/Searches - Ad-Hoc Reports/Searches - My Ad-Hoc Reports/Searches**.



Notes:

- Columns shown on the **My Ad-Hoc Reports List** screen are globally set.
- If more information is desired to be shown on the **My Ad-Hoc Reports List** screen, after creating the report, click **Manage/Edit**, edit the **Report Name,** and edit the report to include the desired additional information. Save any changes.



Ad-Hoc Reports List

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Delete Column: Click this to delete the specified Ad-Hoc Report from Contract Insight. (can only be performed by an admin or the creator of the report)

View Report Column: This option executes the ad-hoc report and display the results in a new page.

Manage Report Column: This option opens the Ad-Hoc Report Wizard for managing the specified Ad-Hoc Report and can only be performed by an admin or the creator of the report.

Report Name Column: Specifies the name of the Ad-Hoc Report.

Emailer Is Active Column: Denotes if the Email Schedule is active and enabled for an Ad-Hoc Report.

Legacy Report: Denotes if the report was built with the Legacy tool (True) or with the Advanced Ad-Hoc Report Builder (False).

Date Created Column: The date the Ad-Hoc Report was created.

Created by Column: The name of the user who created the Ad-Hoc Report.

Report ID Column: The system assigned ID of the Ad-Hoc Report.

In addition to the list of Ad-Hoc Reports, the side menu provides access to:

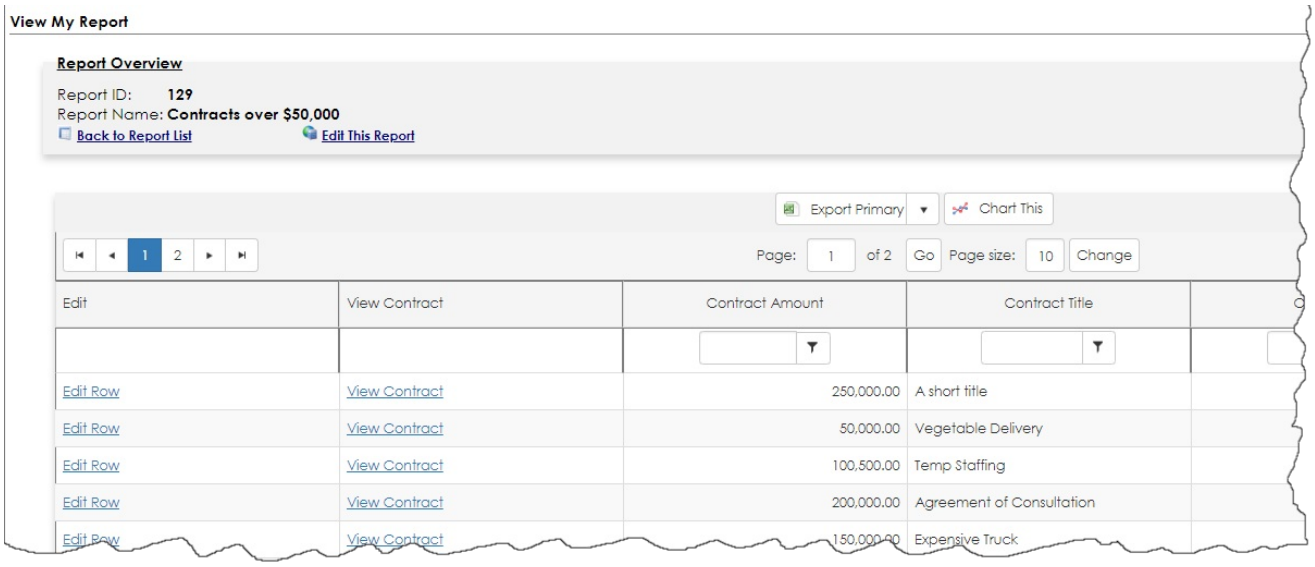
- **Create a new Ad-Hoc Report**.
- The **Ad-Hoc Report List**.
- View the **Legacy Custom Searches** (custom searches from older versions of Contract Insight).
- **Create New Legacy Report** using the legacy report tool.
- Create New E-Z Report (as detailed here)



Running an Ad-Hoc Report

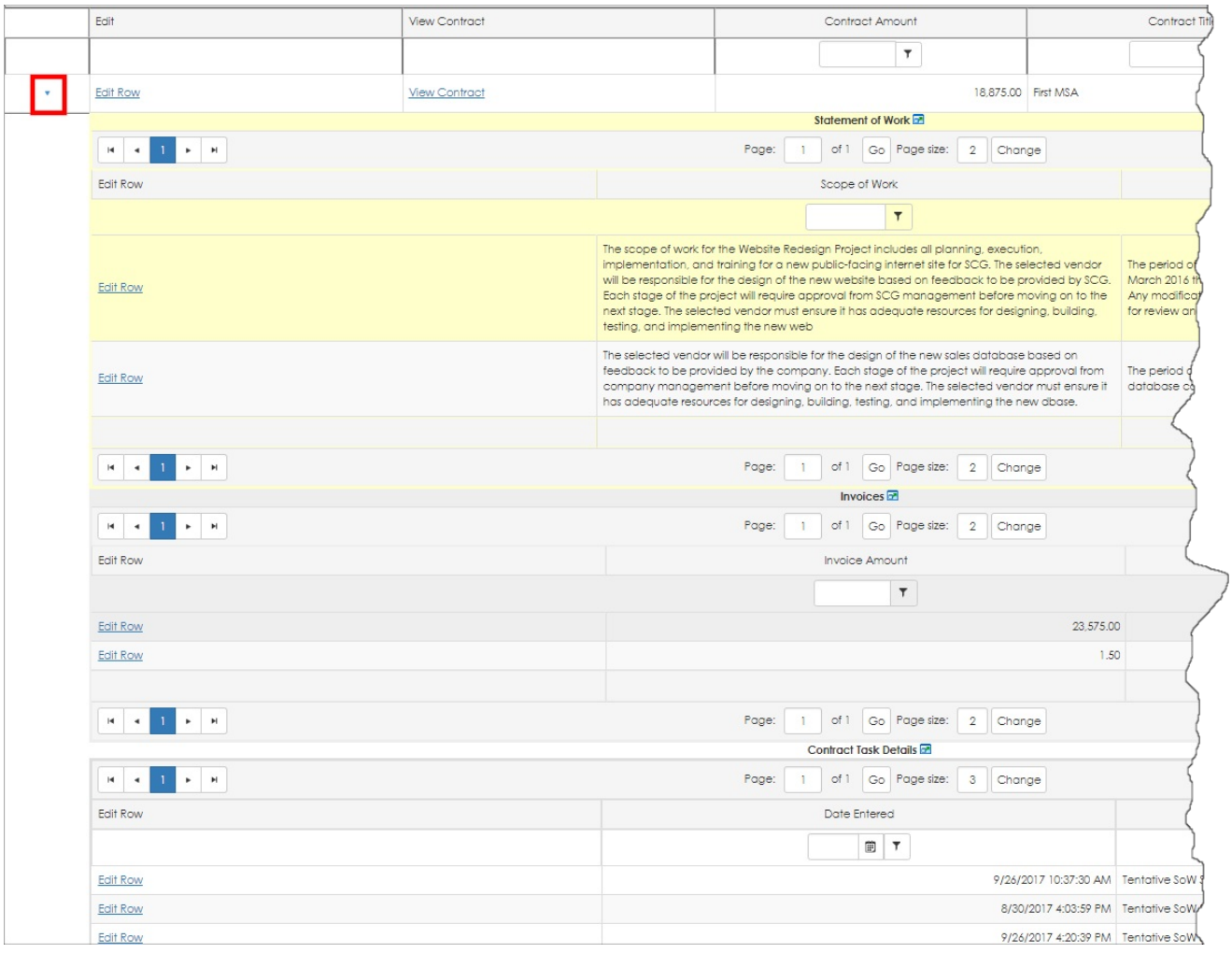
To run/execute an Ad-Hoc Report, click on **View/Run** for the Ad-Hoc Report desired. Contract Insight runs the selected Ad-Hoc Report and displays the results on a new page.

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If enabled, click **Edit Row** to access the in-line field editor for the desired line item. This feature is only available for reports that are **not** legacy.

If working with one or more sub-tables, click the **carat** on the side to view the record's sub-table items. This feature is only available for reports that are **not** legacy.

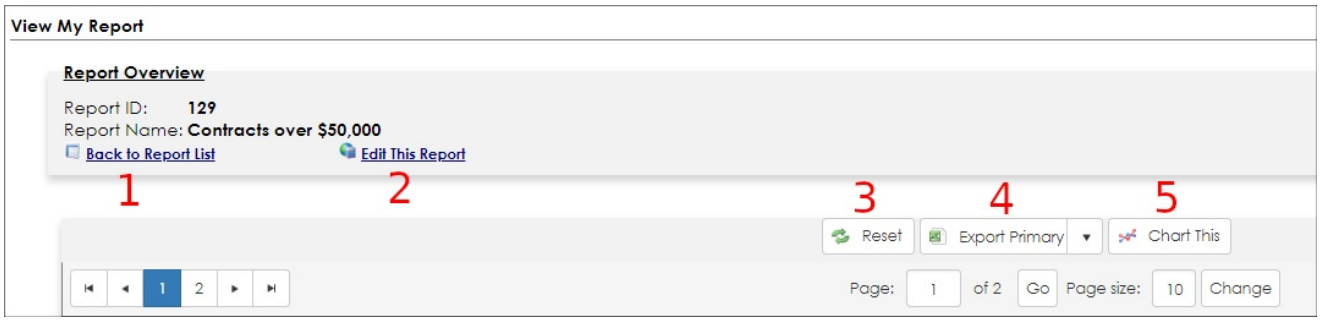


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In the example above, the Scope of Work sub-table is colored yellow but no color was selected for the other sub-tables.

The results grid can be further sorted and filtered as needed using the header rows for each column/field. In addition, the page size can be customized to any desired number, depending on how many records you want displayed on the page at a time.

Additionally, the **Report Overview** provides further management of the executed Ad-Hoc Report.



The following actions can be taken:

1. **Back to Report List**: This options opens the list of Ad-Hoc Reports.

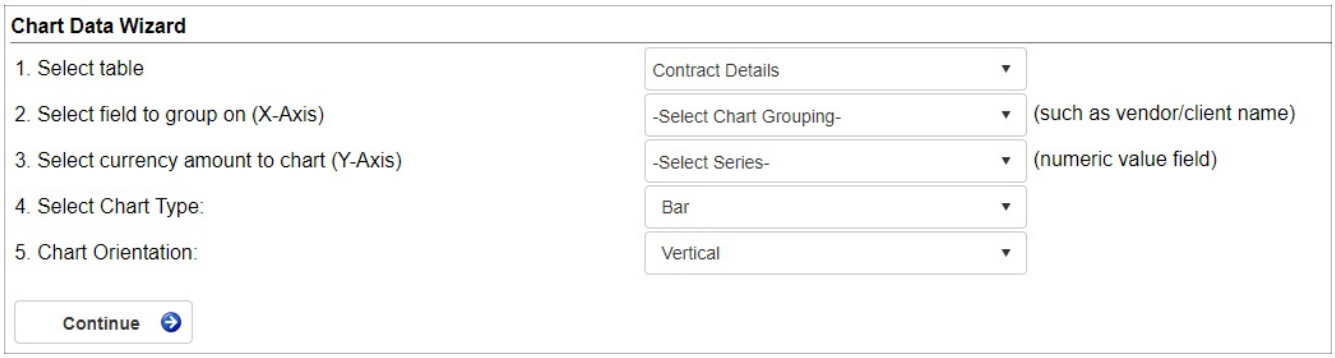
2. **Edit Report** This option opens the Ad-Hoc Report Wizard for managing this executed Ad-Hoc Report and can only be performed by an admin or the creator of the report.

3. **Reset**: This option refreshes the results of the report.

4. **Export the Ad-Hoc Report results**: Export Results or all tables, primary table, or specific sub-table to an Excel format.

Note: Best Practices recommend exporting Ad-Hoc report to Excel and then saving to a PDF format.

5. **Chart This Data:** Charting the results data will require the results to have at least one text-based field and one numeric based field.



To generate a visual chart, provide the following parameters:

1. **Select field to group on**

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- Select one of the text-based fields from the Ad-Hoc Report results.
- The field information on which to group the chart.

2. **Select currency amount to chart**

- Select one of the number-based fields from the Ad-Hoc Report results.
- This determines the second part of the field information on which to group the chart (data plotting).

3. **Select Chart Type**

- Specify what type of visual chart to generate.

4. **Chart Orientation**

- Decide if the chart should be oriented vertically or horizontally.

One-Off Emailing of the Ad-Hoc Report

One-off emailing of reports generated in the **Ad-Hoc Report Manager** is most effectively accomplished as follows:

1. Create desired Ad-Hoc report

2. Test the execution of the report to ensure the results are valid and meaningful and on target.

3. Run/Execute the desired Ad-Hoc Report.

4. Export Ad-Hoc Report results to Excel.

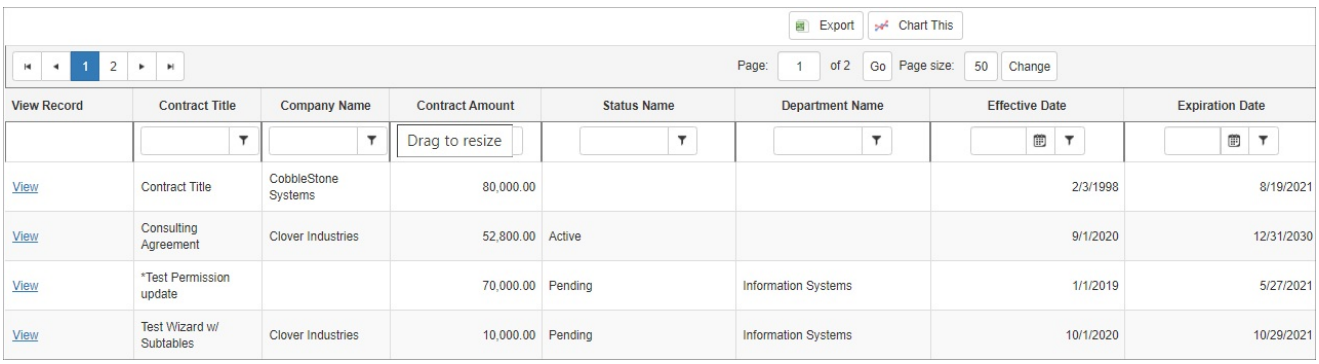
5. Add any desired additional formatting to the Excel extract.

6. Save the Excel file as a .xls or .xlsx file to your computer.

7. Attach saved Excel Report File to the desired email and send the email.

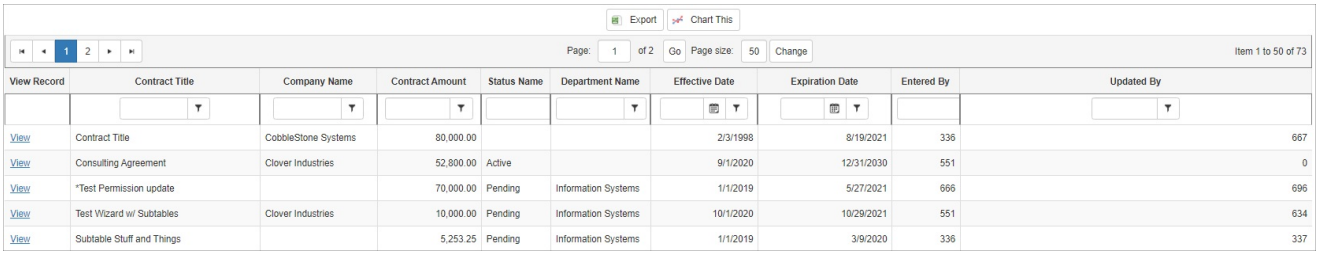
Modifying Ad-Hoc Report Column Sizes

If, after running an Ad-Hoc Report, the user wants to change the widths of the columns, they may do so. Click and drag the **light grey bars** in between columns (such as the light grey bar in between Contract title and company name).



View Record	Contract Title	Company Name	Contract Amount	Status Name	Department Name	Effective Date	Expiration Date
View	Contract Title	CobbleStone Systems	80,000.00			2/3/1998	8/19/2021
View	Consulting Agreement	Clover Industries	52,800.00	Active		9/1/2020	12/31/2030
View	*Test Permission update		70,000.00	Pending	Information Systems	1/1/2019	5/27/2021
View	Test Wizard w/ Subtables	Clover Industries	10,000.00	Pending	Information Systems	10/1/2020	10/29/2021

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View Record	Contract Title	Company Name	Contract Amount	Status Name	Department Name	Effective Date	Expiration Date	Entered By	Updated By
View	Contract Title	CobbleStone Systems	80,000.00			2/3/1998	8/19/2021	336	667
View	Consulting Agreement	Clover Industries	52,800.00	Active		9/1/2020	12/31/2030	551	0
View	*Test Permission update		70,000.00	Pending	Information Systems	1/1/2019	5/27/2021	666	696
View	Test Wizard w/ Subtables	Clover Industries	10,000.00	Pending	Information Systems	10/1/2020	10/29/2021	551	634
View	Subtable Stuff and Things		5,253.25	Pending	Information Systems	1/1/2019	3/9/2020	336	337

NOTE: There are dark grey bars next to the funnel icons. These bars will NOT change the columns widths. This will solely be done using the lighter grey bars.

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Ad Hoc Wizard Overview

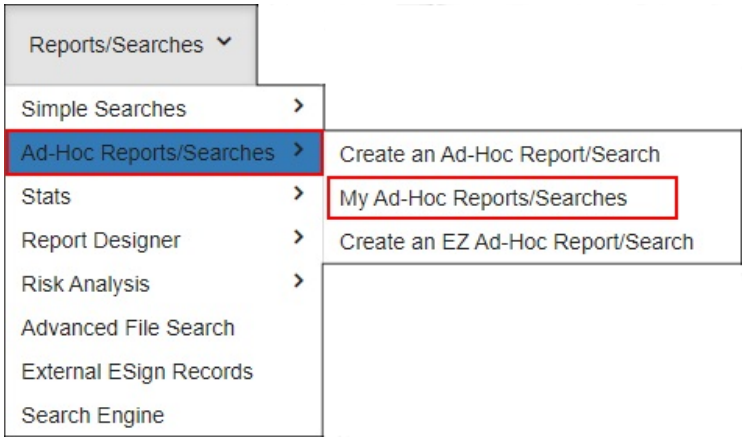
Ad-Hoc Wizard Overview

Ad-Hoc Report Wizard: Overview

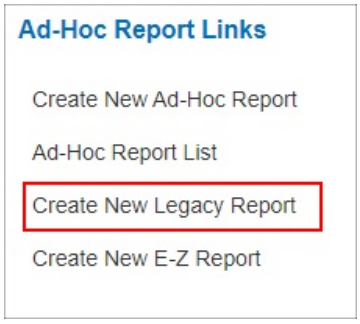
Advanced Ad-Hoc Reporting within Contract Insight is managed through the use of an easy to use on the menu list under **Ad-Hoc Report Wizard** header. Below is a detailed breakdown of the components of this wizard.

Accessing the Legacy Ad-Hoc Report Wizard

1. Navigate to Reports/Searches - Ad-Hoc Reports/Searches - My Ad-Hoc Reports/Searches



2. **My Ad-Hoc Report List** displays. On the side menu, click **Create New Legacy Report**.



Ad-Hoc Report Wizard

1. Overview & Tables: The initial page in the creation of an Ad-Hoc Report to provides overview information and what table(s) are to be used in the report.

2. Field Selection: The second page is used to specify/select what fields from the table(s) selected in step 1 are to be used for this report.

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3. Filters & Conditions: The third page provides the ability for granular filtering and conditions to be applied to the report.

4. Sort Order: The fourth page in the wizard allows for one or more fields selected in step 2 to be assigned as a default or starting sort order.

5. Assigned To: The fifth page is used to decide which Employees/Users can be assigned to view/run this report.

6. Email Schedule: The final page in the wizard provides the ability to configure an e-mail schedule for sending out this report to the Employees/Users assigned.

Ad-Hoc Report Links

Create New Ad Hoc Report: This link opens a blank wizard starting at step 1 - Overview & Tables for the creation of a new Ad-Hoc Report.

Ad Hoc Report List: This link goes back to the list of Ad-Hoc reports (showing those reports the Employee/User Account has access to view)

View/Run This Ad Hoc Report: This link opens the page that executes and displays the results of the Ad-Hoc Report currently being viewed.

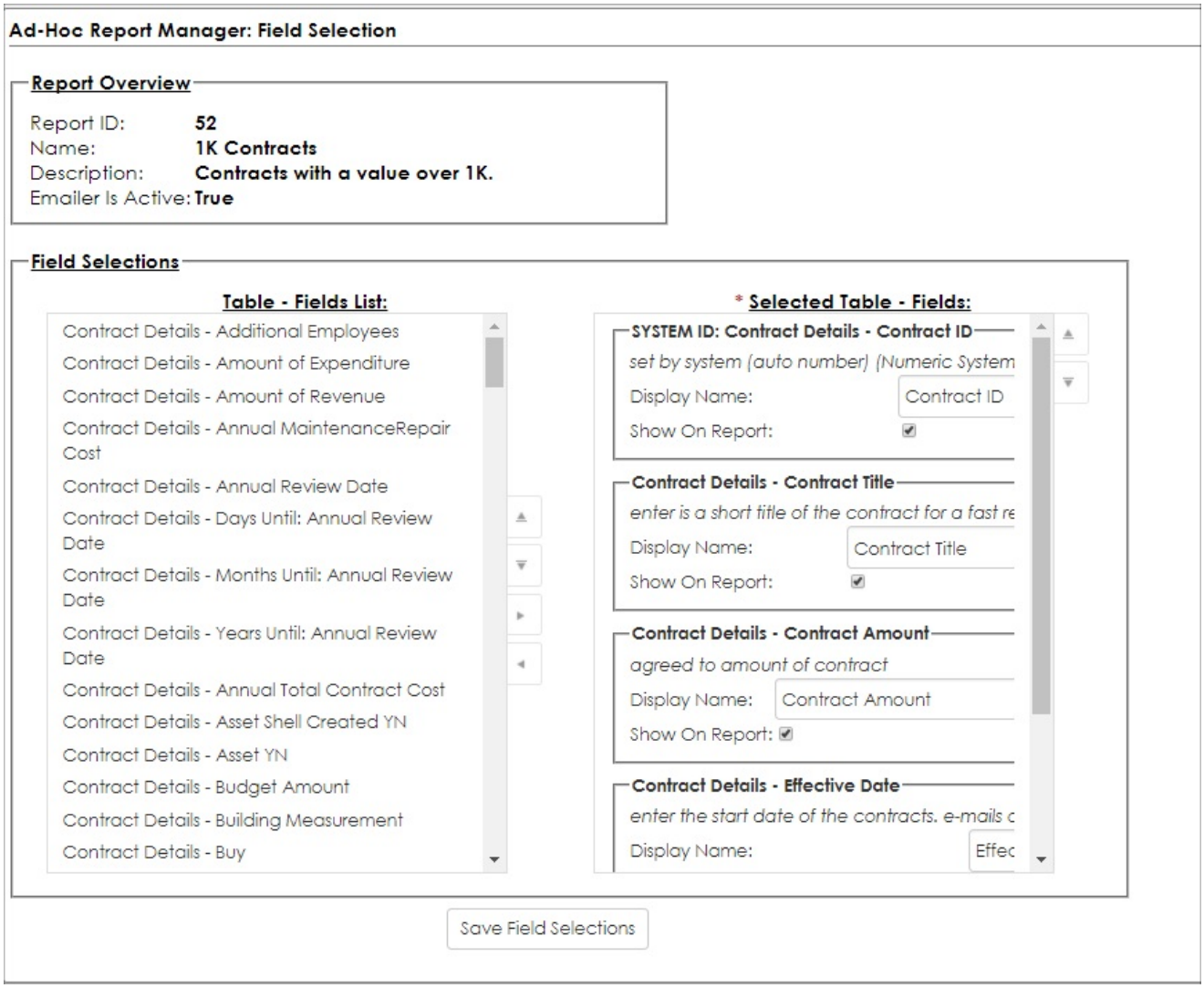
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1. Field Selection

Field Selection

Ad Hoc Report Wizard: Field Selection

The second step in the wizard is used to specify/select what fields from the table(s) selected in step 1 are used for this report.



There are two major components to the field selection process:

1. The list of available fields (left-hand box **Table-Field List**)

2. The list of selected fields (right-hand box **Selected Table - Fields**)

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Table-Field List

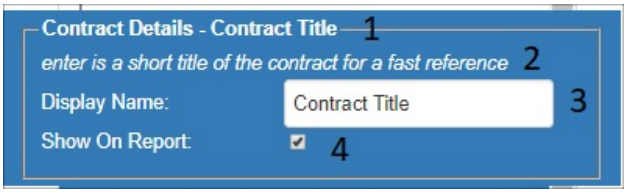
Each item in this list is comprised of two (2) pieces, **TableName** and **FieldName**. For example, the Contract Amount field on the Contract Details screen would appear as: Contract Details - Contract Amount.

By placing the mouse over one of the item in this list, a tool tip pop-up displays the description of the field. A field can be moved over to the **selected** box (the right-hand box) by clicking and dragging the desired field from the left-hand box to the right hand box, or by clicking the desired field in the left-hand box and then clicking the button with the **arrow point to the right**.



Selected Table - Fields

Each item moved into the **selected** box (the right-hand box) displays a cluster of information for that field. The image below is an example of what is be shown when the **Contract Title** field from the **Contract Details** is selected for an Ad-Hoc Report.



Selected Fields

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1. TableName - FieldName: The top part of the select field's box displays both the name of the field and the table to which it belongs.

2. Description: The description of the selected field as set in the field manager.

3. Display Name: The desired display name for the selected field on the Ad-Hoc Report. (This will default to the field's standard display name)

4. Show On Report: A checkbox to determine if the field should be shown on the report or if it is just used for filtering/ conditional purposes.

In addition to the configuration that can be performed on each selected field, the order in which the fields are displayed when the Ad-Hoc report is run can be configured as needed by either clicking a field and dragging it up or down in the right-hand box, or by clicking the desired field in the **Selected Table - Fields** (the right-hand box) and then clicking the buttons with the **up and down arrows** to the right of the **Selected Table - Fields** box (the right-hand box).



System ID Fields Option

For each table selected in the **Overview & Tables** screen, any fields that are system generated (**SYSTEM ID**) are displayed separately at the bottom of the **Table: Fields List** box.

Note: If a **SYSTEM ID** field is selected to be displayed on the Ad-Hoc Report, only the ID value is be displayed.

Upon selecting a **SYSTEM ID** field and adding it to the **Selected Table Fields** list, the field is notated as a SYSTEM ID field.

Item Count Fields

After selecting a **Count** (Linked) table, in order to display the count field on your report, the **ITEM COUNT OF:** field must be added. Included in the possible list of count fields is **Customer/Vendor Attachments**. If reporting on the table, the count of attachments for the vendors/customers is available (e.g., reporting off of customers/vendors with no attachments)

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2. Filers and Conditions

Filters & Conditions

Ad-Hoc Wizard: Filters & Conditions

The third step in the wizard provides the ability for granular filtering and conditions to be applied to the report.



To better understand how to use the filters/conditions functionality, lets breakdown the components. In the picture below each of the components of the filtering control are numbered.



Filtering Control

1: And/Or Selector: Used to determine if a new expression is being added as an **AND** or **OR** condition

2: Add New Filter Expression: Adds a new filter expression to the list of conditions (takes into consideration the **And/Or Selector**)

3: Add Expression Group: Adds a new sub-grouping of expressions to be used in complex conditions. (takes into consideration the **And/Or Selector** between groups)

4: Remove Filter Item: Removes the filter/condition from the list of applied filters and conditions

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Saving and Previewing

Once the filters/conditions have been specified, click **Save & Preview Filter(s)** to save the filters to the Ad-Hoc report and bind the results to the grid on the screen for a preview of what the results would be. If the results need to be modified they can be done so by changing the filters/conditions defined on the screen and clicking **Save & Preview Filter(s)** again.

An example of filtered results is shown below.



Contract ID	Contract Title	Contract Amount
494	Business Agreement	50,000,000.00
497	Business Associate Agreement1	50,000.00
535	Warehouse Lease Agreement	70,000.00
536	Truck Lease Agreement	60,000.00
538	Finance Agreement	70,000.00
539	Consulting Agreement	200,000,000.00
541	Car Leasing Agreement	30,000.00

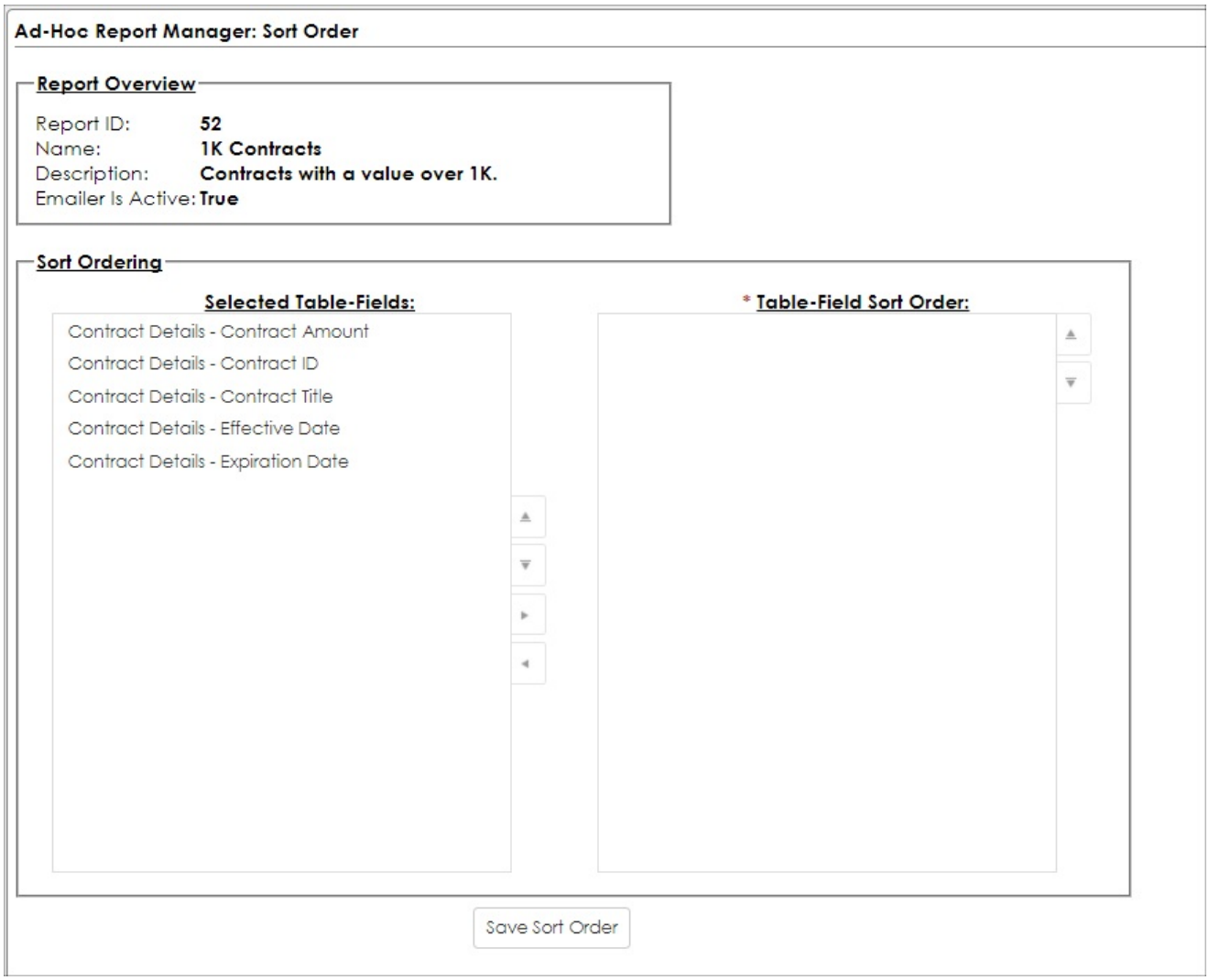
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3. Sort Order

3. Sort Order

Ad-Hoc Report Wizard: Sort Order

The fourth step in the wizard allows for one or more fields selected in step 2 to be assigned as a default or starting sort order.



Sort Order Management

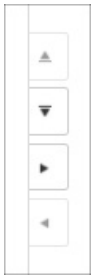
Managing the sort order consists of two multi-select boxes:

1. The **Selected Table-Fields** (the left-hand box). It shows all the fields selected in step 2 for this ad-hoc report.

2. The **Table-Field Sort Order** (the right-hand box). It shows the fields selected for the sort order.

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To use a field in the sort order, the field can either be clicked and dragged from the left-hand box to the right-hand box, or the field can be selected in the left-hand box and moved to the sort order (right-hand box) by clicking the **right arrow button**.



Setting sort order parameters

Once a field is moved to the **Sort Order** (right-hand box), a parameter based area displays.



Each field can be specified as either sorting based on **Ascending** or **Descending** order.

Sort Order Hierarchy

When defining multiple fields to be part of the sort order, you are configuring a sort order hierarchy. Sort Order Hierarchies follow the following logic:

- Sort the results of the report by the first field specified in the sort order
- For any duplicates based on the previous field sort order, sort those duplicates based on the next field in the sort order
- Repeat this step for any additional fields in the sort order (field 3 and up)

With this logic in mind, the last aspect of the sort order functionality is the ordering of fields selected for the sort order. To change the order, click the field in questions and click the **up** or **down arrows** to the right of the **Sort Order** box (right-hand box). This moves the field up or down in the sort order hierarchy.



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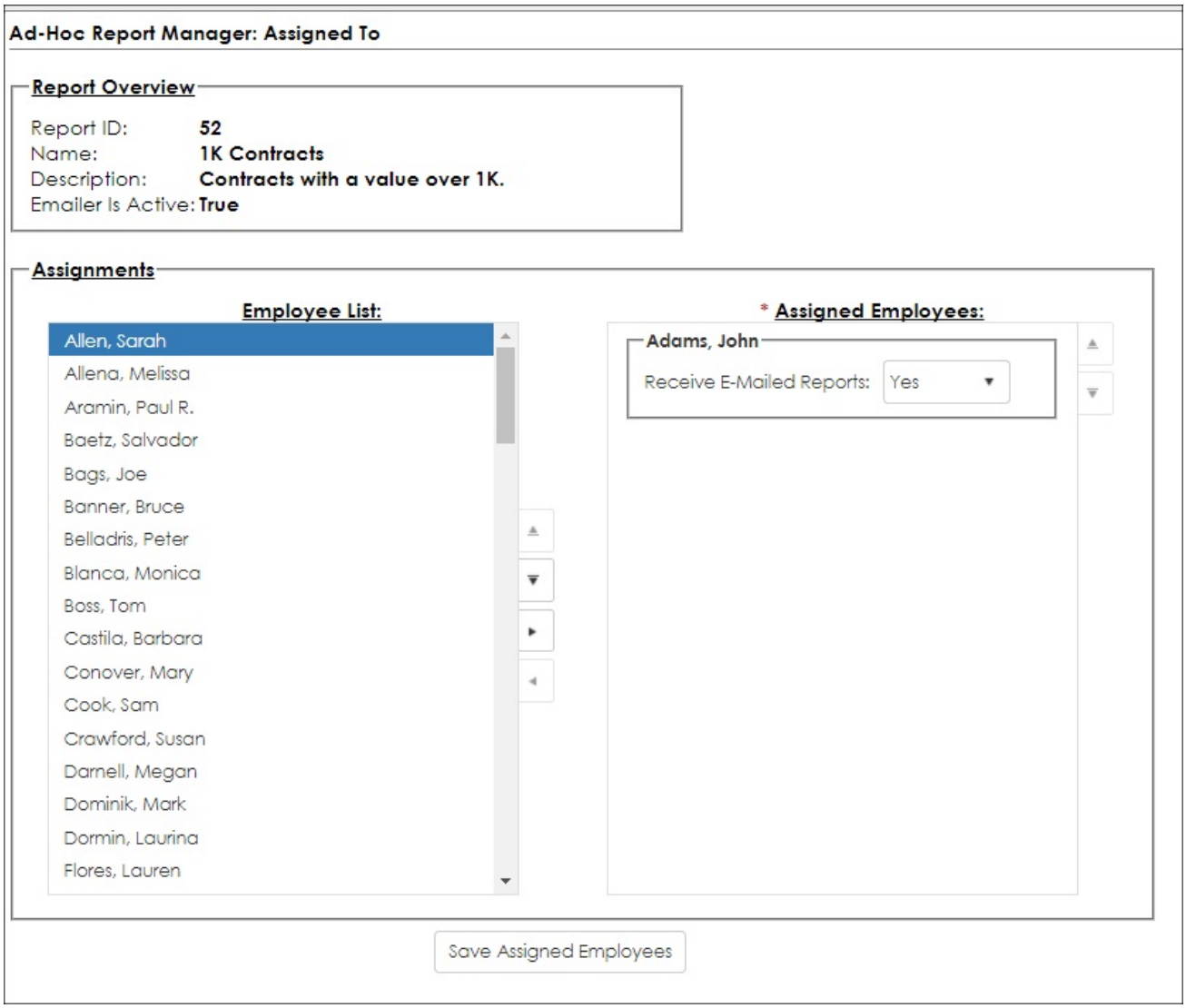
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4. Assigned To

Assigned To

Ad-Hoc Report Wizard: Assigned To

The fifth step in the wizard is used to decide which Employees/Users are assigned to view/run this report.



Employees Assigned Management

Managing the assigned employees consists of two multi-select boxes:

1. **Employees List** (the left-hand box)

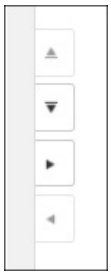
- This box shows all the employees of the application

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2. **Assigned Employees** (the right-hand box)

- This box shows the employees currently assigned to the ad-hoc report

To assign an employee to the ad-hoc report, the employee's name can either be clicked and dragged from the left-hand box to the right hand box, or it can be selected in the left-hand box and moved to the **Assigned Employees** list(right-hand box) by clicking the **right arrow** button.



Setting Assigned Employee Parameters

Once an employee is moved to the **Assigned Employees List** (right-hand box), there is a parameter for each employee to designate is he or she is to **Receive E-Mailed Reports**.



Each employee assigned to the ad-hoc report can be specified as being able to receive e-mailed reports (if there is an email schedule setup for the ad-hoc report).

By default, the only assigned employee for an ad-hoc report will be the employee who created the ad-hoc report.

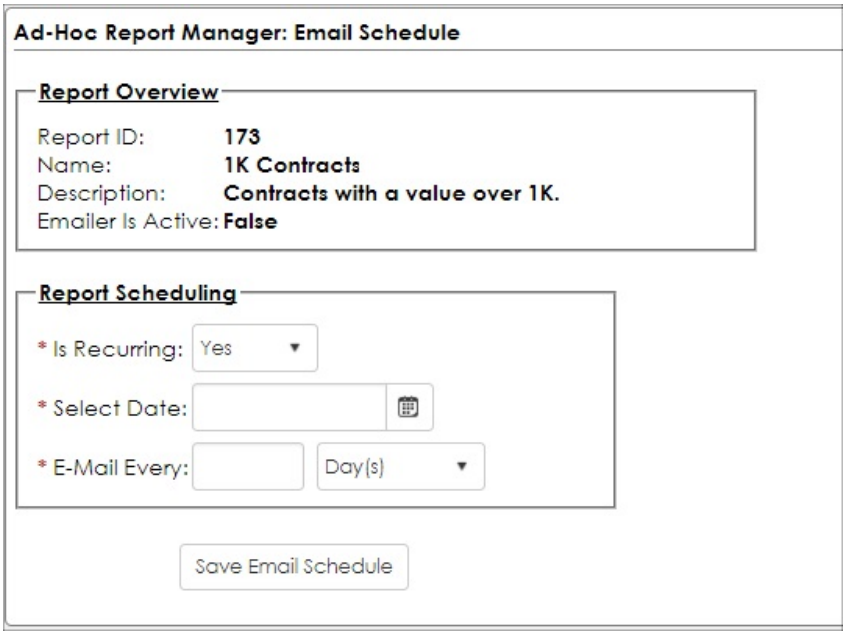
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5. Email Schedule

Email Schedule

Ad-Hoc Report Wizard: Email Schedule

The last step in the wizard provides the ability to configure an e-mail schedule for sending out this report to the Employees/Users assigned.



To specify a schedule for e-mailing an ad-hoc report, the first decision that must be made is if the emailing is recurring or not.

Recurring Email Schedule

If the ad-hoc report emailing is to be recurring, the following parameters must be defined:

1. **Is Recurring**: Select Yes for a recurring Email schedule.

2. **Starting On**: The date on which this recurring Email schedule is to start.

3. **E-Mail Every**: Defines the recurring nature of the schedule in the form of number of [days, weeks, months, quarters, years]



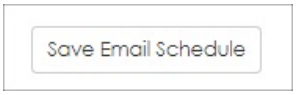
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Single/One-Off Email

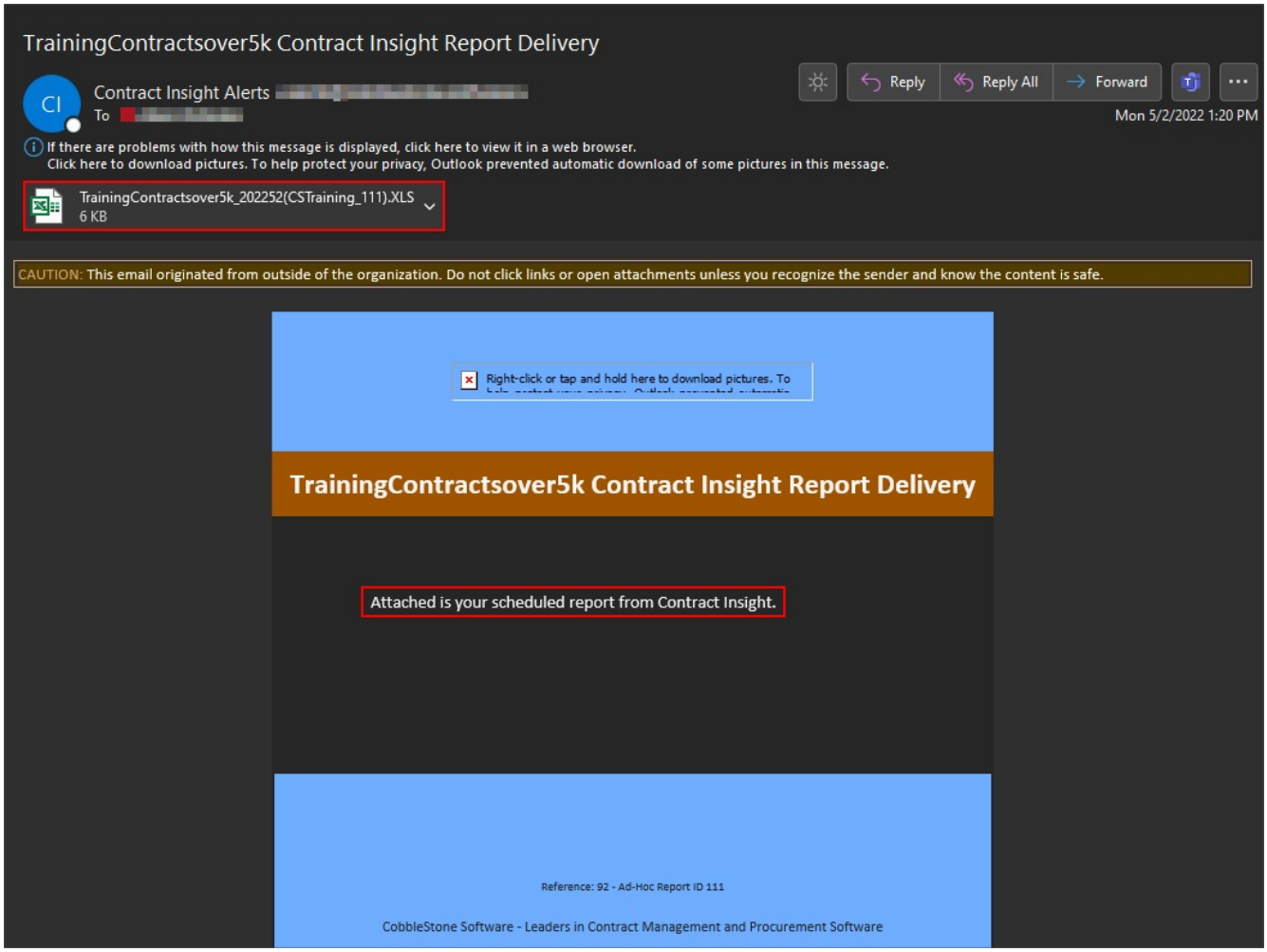
For only a one-off or single email to be sent out for this ad-hoc report, the only parameter that needs to be provided is the date on which the email is to be sent.



Once the information for the E-Mail Schedule is provided, click **Save Email Schedule** to finalize this portion of the ad-hoc report wizard.



When sent, the recipient receives not only the report itself but the description as well.



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6. View/Run This Ad-Hoc Report

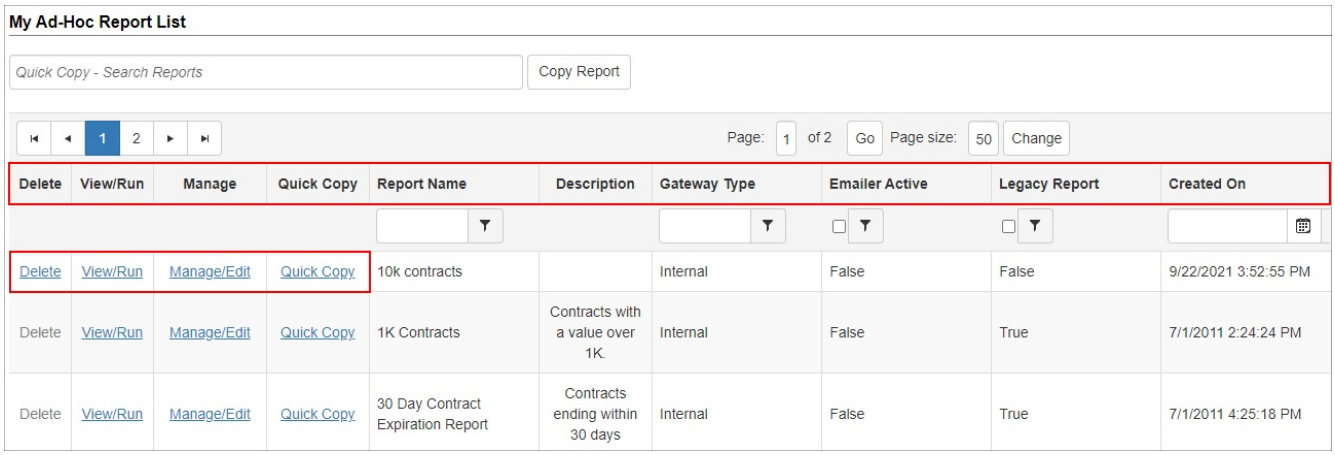
View/Run This Ad-Hoc Report

Ad-Hoc Report Wizard: Viewing & Running

To view a list of all Ad-Hoc reports to which you have access, navigate to **Reports/Searches** > **Ad-Hoc Reports/Searches** > **My Ad-Hoc Reports/Searches**.

Notes:

- Columns shown on the **My Ad-Hoc Reports List** screen are globally set.
- If more information is desired to be shown on the **My Ad-Hoc Reports List** screen, after creating the report, click **Manage/Edit**, edit the **Report Name,** and edit the report to include the desired additional information. Save any changes.



Ad-Hoc Reports List

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Delete Column: Click this to delete the specified Ad-Hoc Report from Contract Insight. (can only be performed by an admin or the creator of the report)

View Report Column: This option executes the ad-hoc report and display the results in a new page.

Manage Report Column: This option opens the Ad-Hoc Report Wizard for managing the specified Ad-Hoc Report and can only be performed by an admin or the creator of the report.

Report Name Column: Specifies the name of the Ad-Hoc Report.

Emailer Is Active Column: Denotes if the Email Schedule is active and enabled for an Ad-Hoc Report.

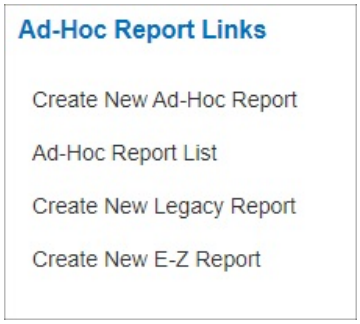
Date Created Column: The date the Ad-Hoc Report was created.

Created by Column: The name of the user who created the Ad-Hoc Report.

Report ID Column: The system assigned ID of the Ad-Hoc Report.

In addition to the list of Ad-Hoc Reports, the side menu provides access to:

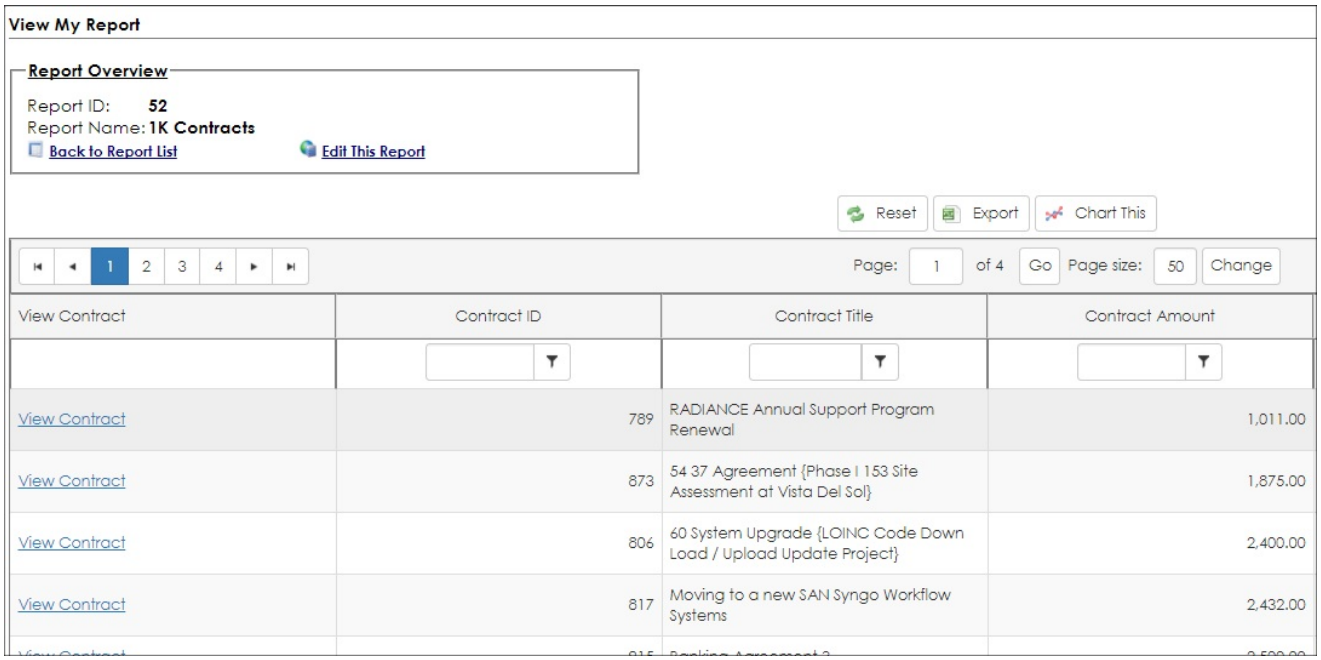
- **Create a new Ad-Hoc Report**.
- View the **Legacy Custom Searches** (custom searches from older versions of Contract Insight).



Running an Ad-Hoc Report

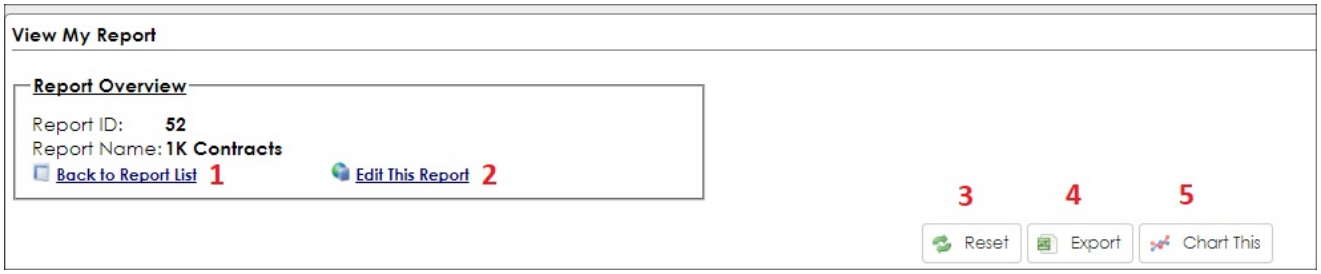
To run/execute an Ad-Hoc Report, click on **View/Run** for the Ad-Hoc Report desired. Contract Insight runs the selected Ad-Hoc Report and displays the results on a new page.

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The results grid can be further sorted and filtered as needed using the header rows for each column/field. In addition, the page size can be customized to any desired number, depending on how many records you want displayed on the page at a time.

Additionally, the side menu provides further management of the executed Ad-Hoc Report.



The following actions can be taken:

1. **Back to Report List**: This options opens the list of Ad-Hoc Reports.

2. **Edit Report** This option opens the Ad-Hoc Report Wizard for managing this executed Ad-Hoc Report and can only be performed by an admin or the creator of the report.

3. **Reset**: This option refreshes the results of the report.

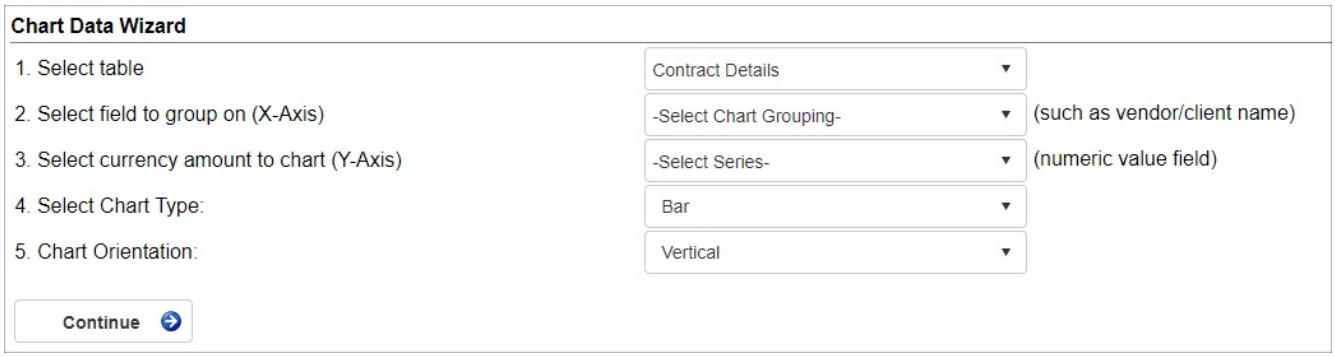
4. **Export the Ad-Hoc Report results**: Export Results to an Excel format.

Note: Best Practices recommend exporting Ad-Hoc report to Excel and then saving to a PDF format.

5. Chart Ad-Hoc Report results data: This option opens the chart data page to visually chart the results provided.

6. Chart This Data: Charting the results data will require the results to have at least one text-based field and one numeric based field.

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To generate a visual chart, provide the following parameters:

1. **Select field to group on**

- Select one of the text-based fields from the Ad-Hoc Report results.
- Which field information on which to group the chart.

2. **Select currency amount to chart**

- Select one of the number-based fields from the Ad-Hoc Report results.
- This will decide the second part of the field information on which to group the chart (data plotting).

3. **Select Chart Type**

- Specify what type of visual chart to generate.

4. **Chart Orientation**

- Decide if the chart should be oriented vertically or horizontally.

One-Off Emailing of the Ad-Hoc Report

One-off emailing of reports generated in the **Ad-Hoc Report Manager** is most effectively accomplished as follows:

1. Create desired Ad-Hoc report

2. Test the execution of the report to ensure the results are valid and meaningful and on target.

3. Run/Execute the desired Ad-Hoc Report.

4. Export Ad-Hoc Report results to Excel.

5. Add any desired additional formatting to the Excel extract.

6. Save the Excel file as a .xls or .xlsx file to your computer.

6. Attach saved Excel Report File to the desired email and send the email.

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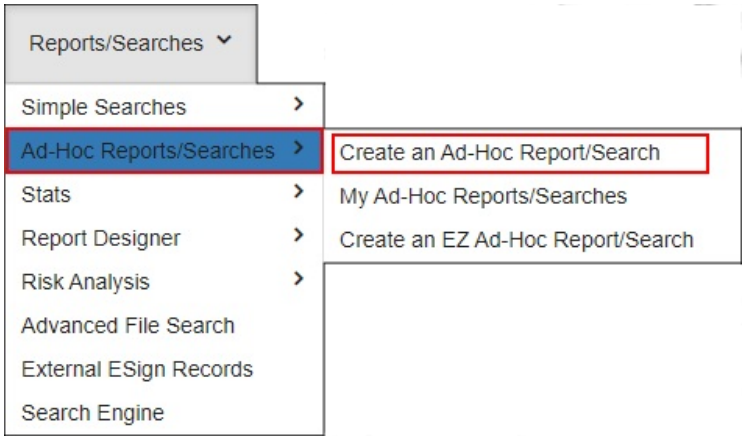
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My Ad-Hoc Reports List Overview

My Ad-Hoc Reports List Overview

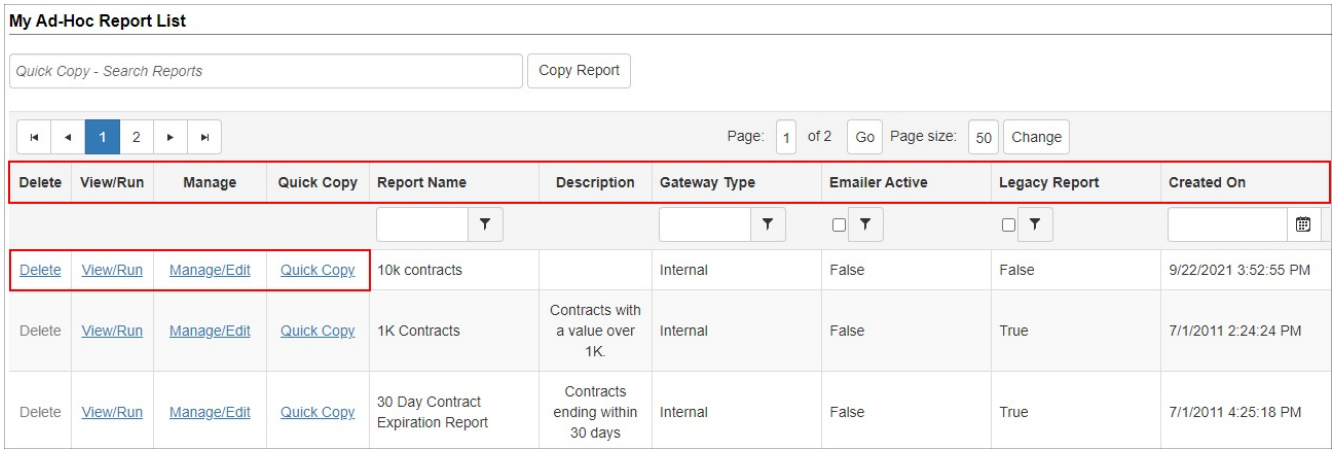
Ad-Hoc Report List: Overview

To view a list of all Ad-Hoc reports to which you have access, navigate to **Reports/Searches** > **Ad-Hoc Reports/Searches** > **My Ad-Hoc Reports/Searches**.



Notes:

- Columns shown on the **My Ad-Hoc Reports List** screen are set globally.
- If more information is desired to be shown on the **My Ad-Hoc Reports List** screen, after creating the report, click **Manage/Edit,** edit the **Report Name,** and include the desired added information.



Ad-Hoc Reports List

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Delete Column: This option deletes the specified Ad-Hoc Report from Contract Insight. (can only be performed by an admin or the creator of the report)

View/Run Column: This option executes the ad-hoc report and display the results in a new page.

Manage/Edit Column: This option goes into the **Ad-Hoc Report Wizard** for managing the specified Ad-Hoc Report. (can only be performed by an admin or the creator of the report)

Report Name Column: Specifies the name of the Ad-Hoc Report.

Emailer Is Active Column: Denotes if the Email Schedule is active and enabled for an Ad-Hoc Report.

Created On Column: The date on which the Ad-Hoc Report was created.

Created By Column: The name of the user who created the Ad-Hoc Report.

Report ID Column: Specifies the system assigned ID of the Ad-Hoc Report.

In addition to the list of Ad-Hoc Reports, the Ad-Hoc Report Links items/menu provides access to:

Create New Ad Hoc Report

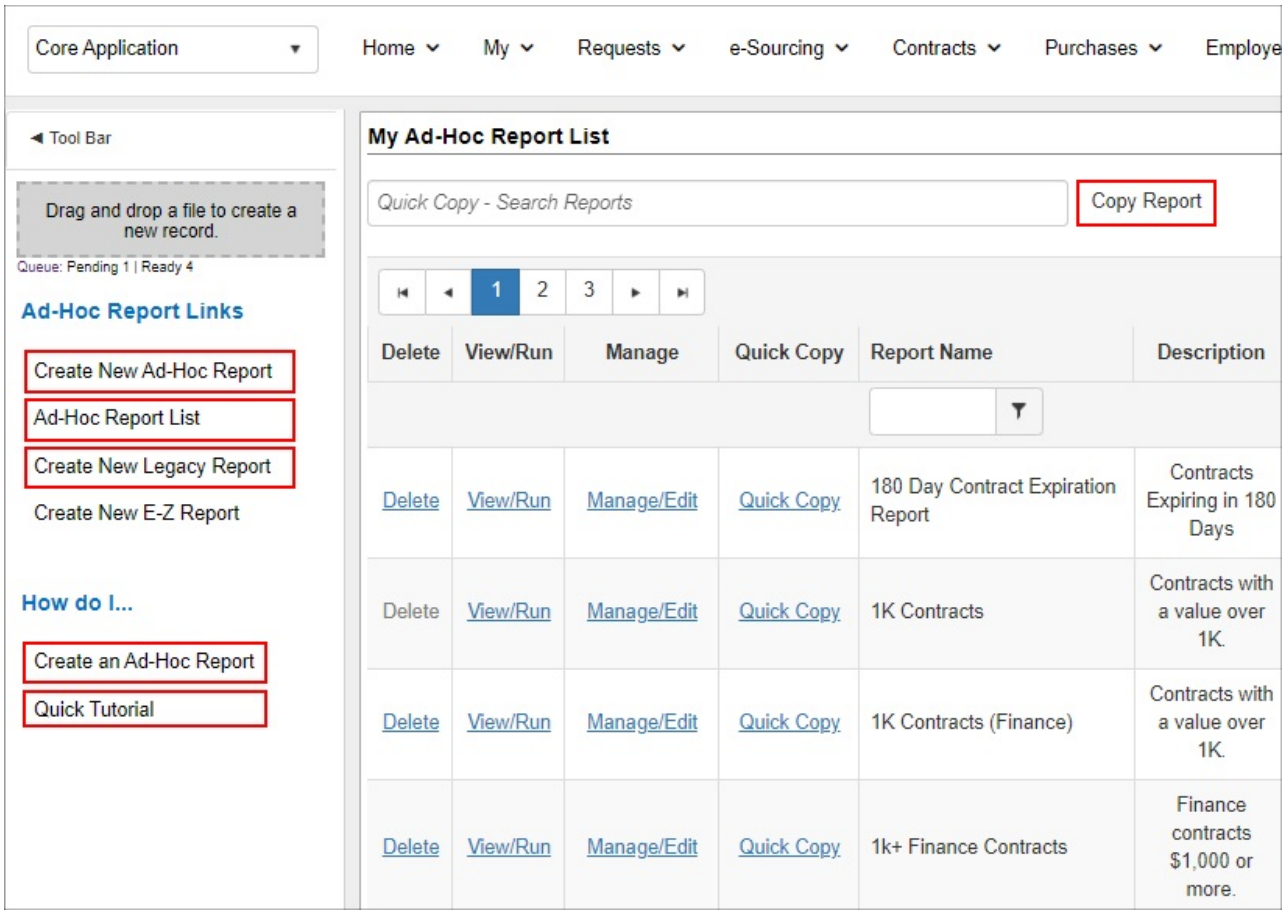
Ad Hoc Report List

Ad-Hoc Quick Copy

Legacy Custom Searches List: Custom searches from previous versions of Contract Insight)

How To: Links to the Documentation Wiki and Tutorial Video

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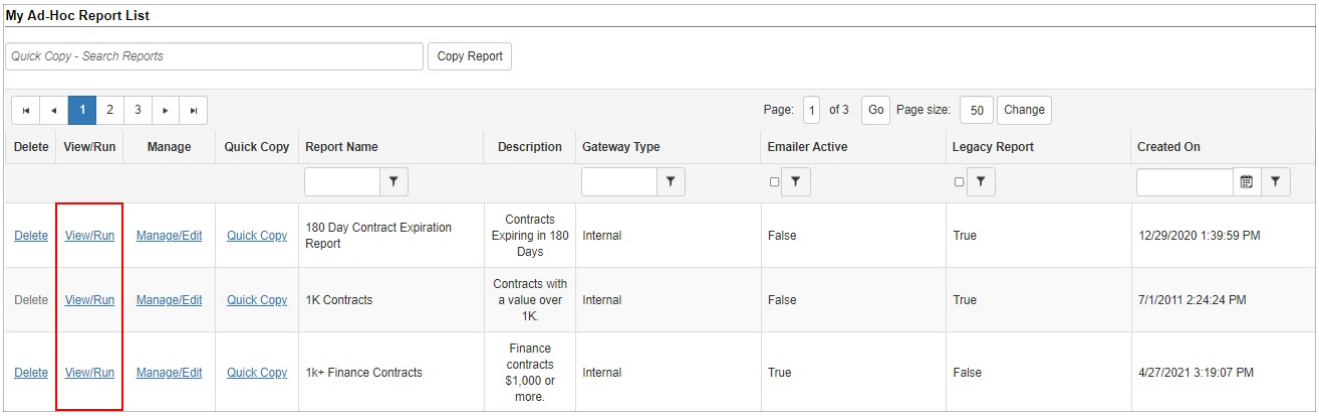
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View/Run Report

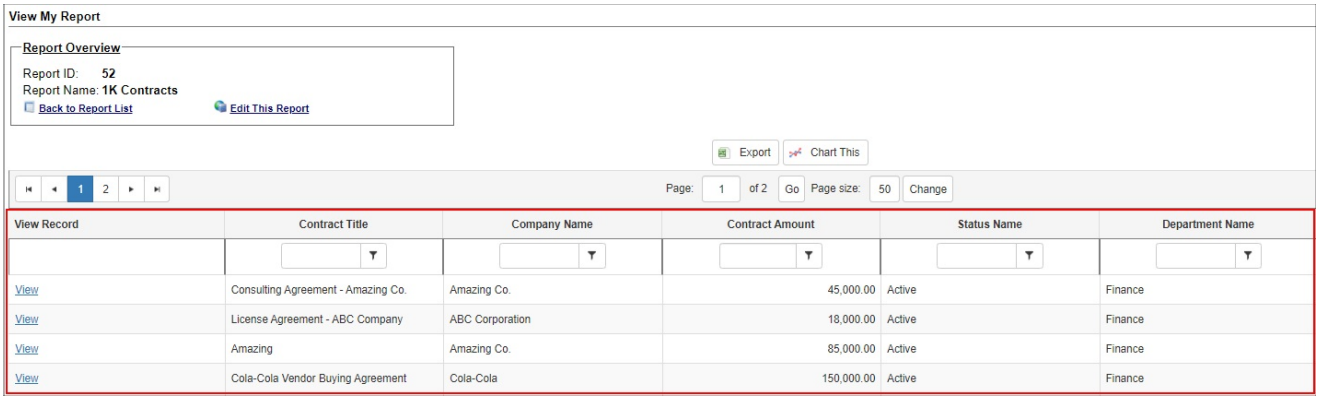
View/Run Report

Ad-Hoc Report List: View/Run a Report

To run/execute an Ad-Hoc Report, click **View/Run** for the Ad-Hoc Report desired.



Contract Insight runs the selected Ad-Hoc Report and displays its results on a new page.



The results grid can be further sorted and filtered as needed using the header rows for each column/field. Additionally, the page size can be customized to any desired number, depending on how many records to be displayed on the page at a time.

In addition to the results grid, numerous options provide further management of the executed Ad-Hoc Report.

A. **Back to Report List**: This will return you to the list of Ad-Hoc Reports

B. **Edit Report**: This link will go into the Ad-Hoc Report Wizard for managing this executed Ad-Hoc Report and can only be performed by an admin or the creator of the report

C. **Export the Ad-Hoc Report results**: Export Results to an Excel format

Note: Best Practices recommend exporting Ad-Hoc report to Excel and then saving to PDF format.

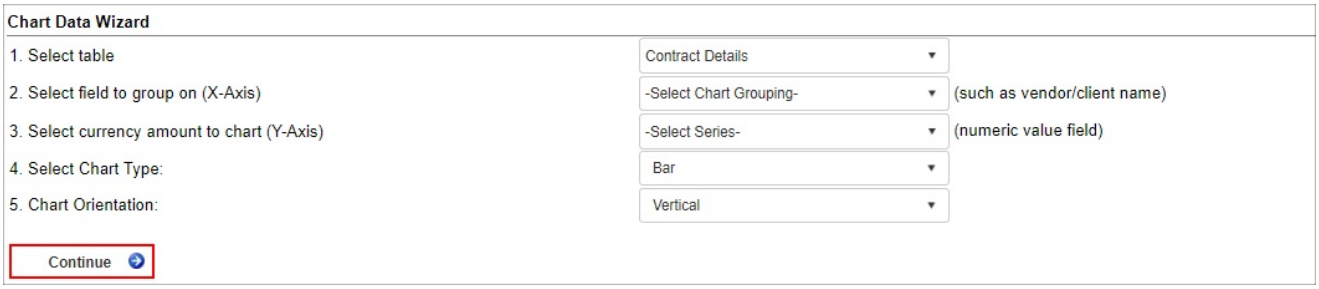
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D. **Chart Ad-Hoc Report results data**: This option opens the chart data page to visually chart the results provided



Chart This Data

Charting the results data will require the results to have at least one text-based field and one numeric based field and can be done by clicking **Chart This Data**.



To generate a visual chart provide the following parameters:

1. **Select field on which to group**

- Select one of the text-based fields from the Ad-Hoc Report results.
- This will decide what field information on which to group the chart.

2. **Select currency amount to chart**

- Select one of the numeric based fields from the Ad-Hoc Report results.
- This will determine the second part of the field information on which to group the chart (data plotting).

3. **Select Chart Type**

- Specify which type of visual chart to generate.

4. **Chart Orientation**

- Decide if the chart should be oriented vertically or horizontally.

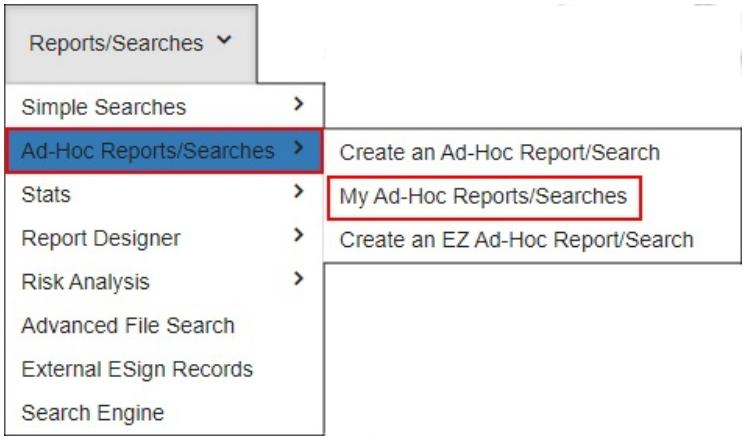
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Manage/Edit & Delete Reports

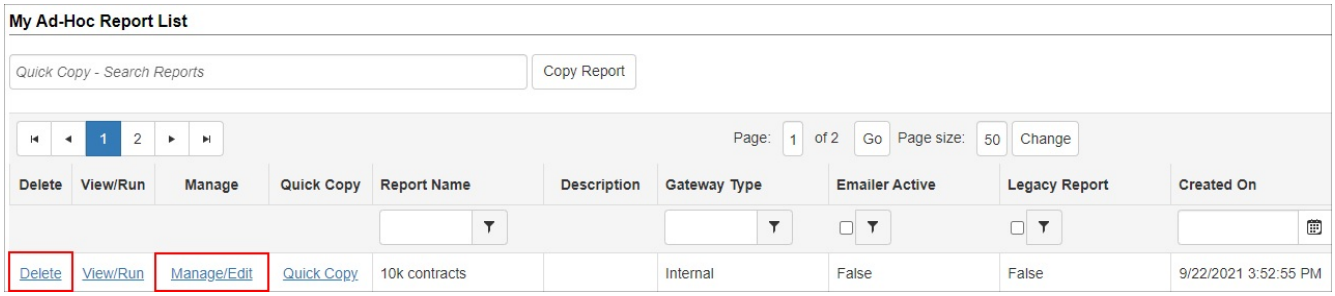
Manage/Edit & Delete Reports

Ad-Hoc Reports List: Manage/Edit & Delete Reports

To manage, edit, or delete an Ad-Hoc Report/Search, navigate to **Reports/Searches** > **Ad-Hoc Reports/Searches** >**My Ad-Hoc Reports/Searches**.



The **Ad-Hoc Reports List** screen displays.



To Manage/Edit an Ad-Hoc Report/Search

1. Click **Manage/Edit** for the report you would like to change.

2. Follow the same steps as if a new report was being creating. Be sure to save all changes made.

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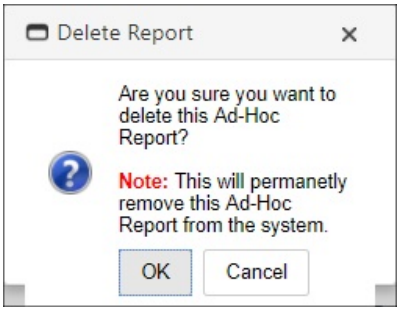
Note: For more information about creating an Ad-Hoc Report/Search, see the following Wiki pages:

1. Overview & Tables
2. Field Selection
3. Filters & Conditions
4. Sort Order
5. Assigned To
6. Email Schedule

To Delete an Ad-Hoc Report/Search

1. Click **Delete** for the Ad-Hoc Report/Search to remove.

2. Confirm the removal of the report by clicking **OK**. Abandon changes by clicking **Cancel**.



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Sorting & Filtering The Ad-Hoc Reports List

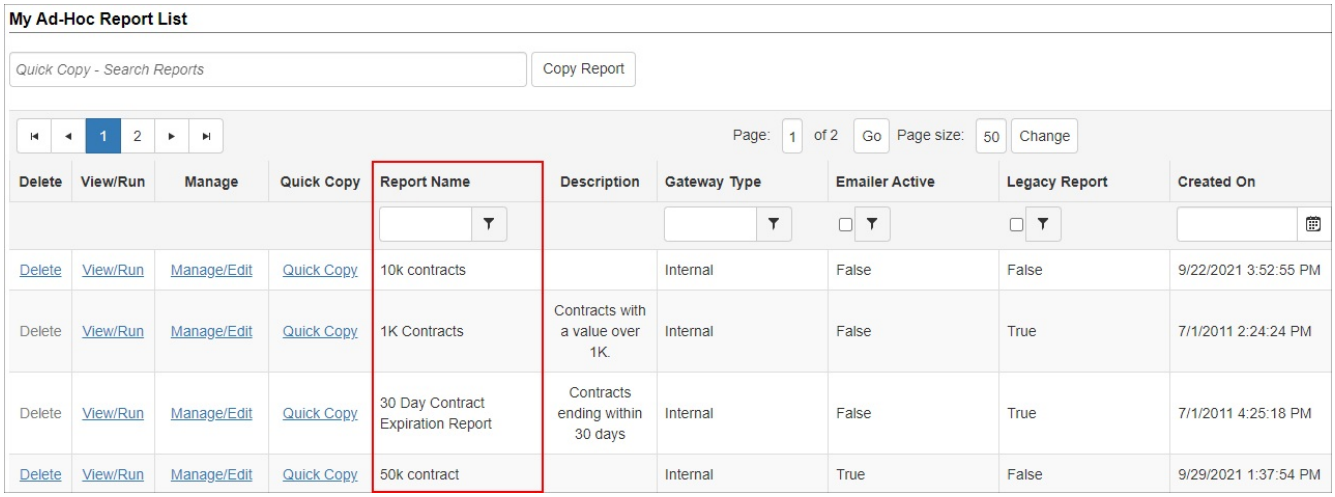
Sorting & Filtering the Ad-Hoc Reports List

Ad-Hoc Reports List: Sorting & Filtering

The **My Ad-Hoc Reports List** screen can be sorted and filtered to assist in searching the Ad-Hoc Reports available.

Sorting the Ad-Hoc Reports List

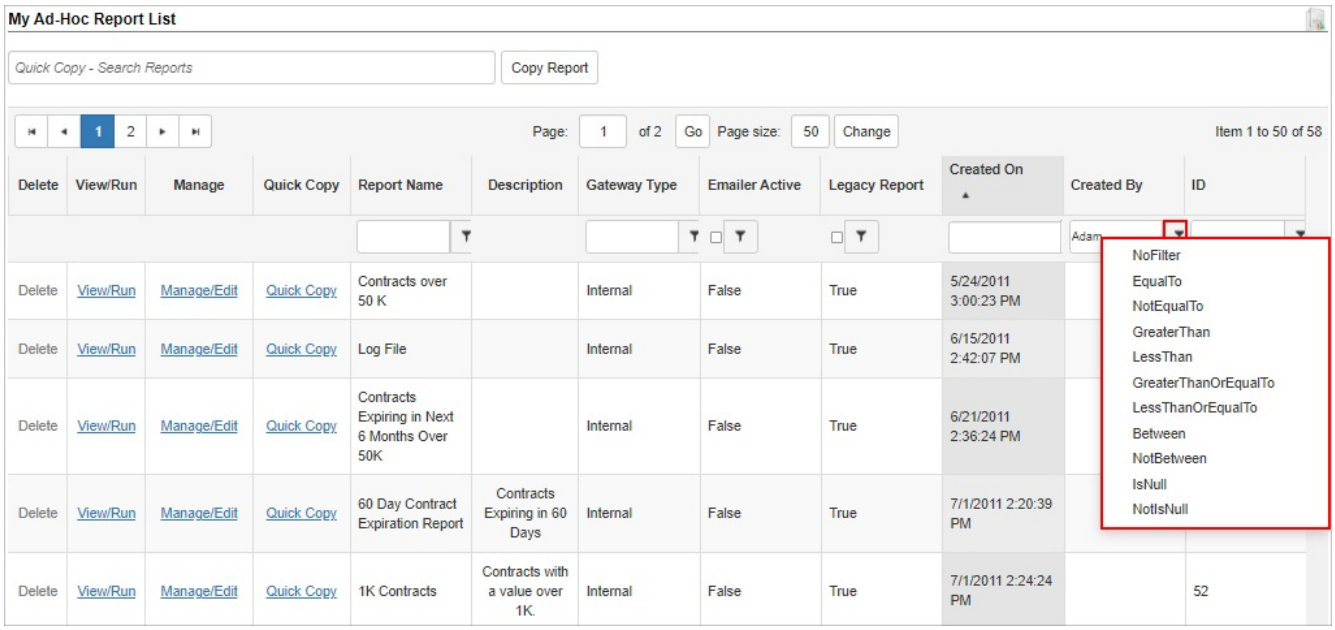
Each column can be sorted as well by clicking on the column name once to sort ascending, a second time for descending, and a third time to return to the original sort order.



Filtering the Ad-Hoc Reports List

The **My Ad-Hoc Report List** screen can be filtered by entering the filter criteria into the appropriate column's text box and then clicking the **filter icon** to designate how the screen will be filtered based on the entered keyword.

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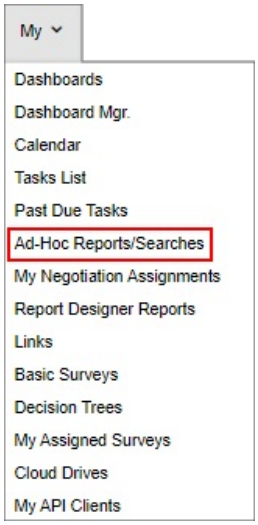
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Legacy Custom Searches

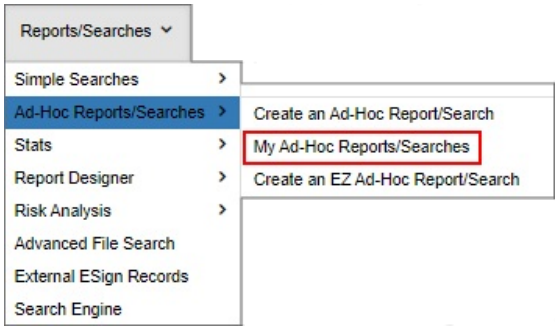
Legacy Custom Searches

Ad-Hoc Report List: Legacy Custom Searches

Reports and Searches created in previous versions of Contract Insight were created in the **Custom Searches** feature. To locate the reports/searches created in Custom Searches, navigate to the **My** or the **Reports/Searches** top menu item to access the **Ad-Hoc Reports/Searches List**.

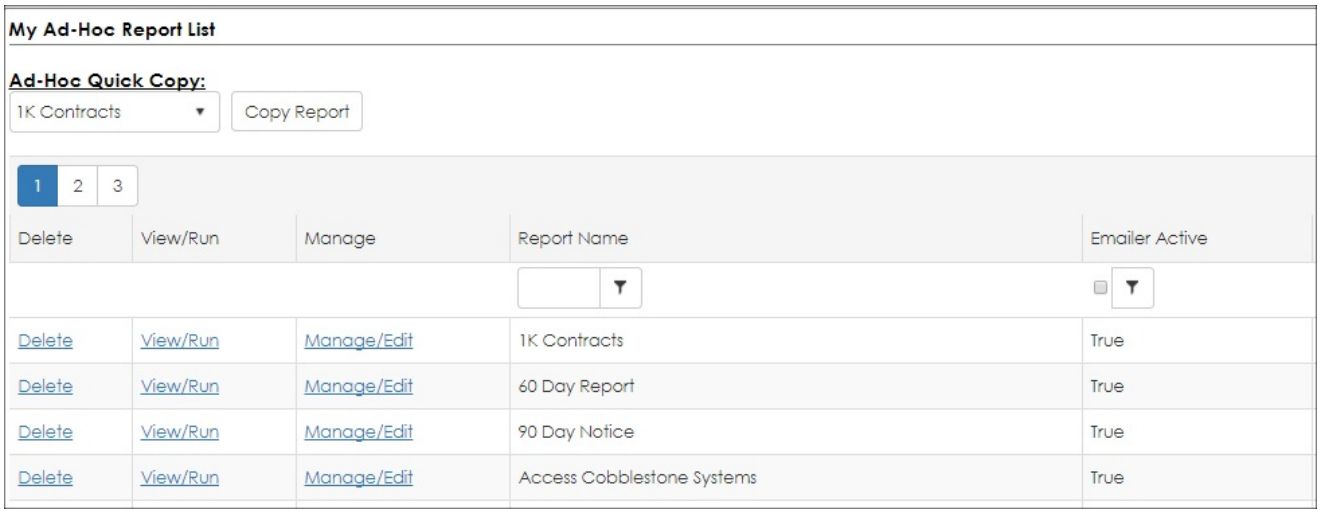


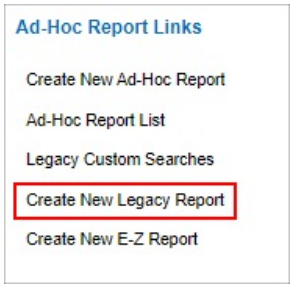
Either of these methods will take you to the **My Ad-Hoc Reports List** screen on which there is a section on the side menu for **Legacy Custom Searches**.



By clicking **Legacy Custom Searches**, a user can access and run all reports/searches created in the Custom Reports reporting tool.

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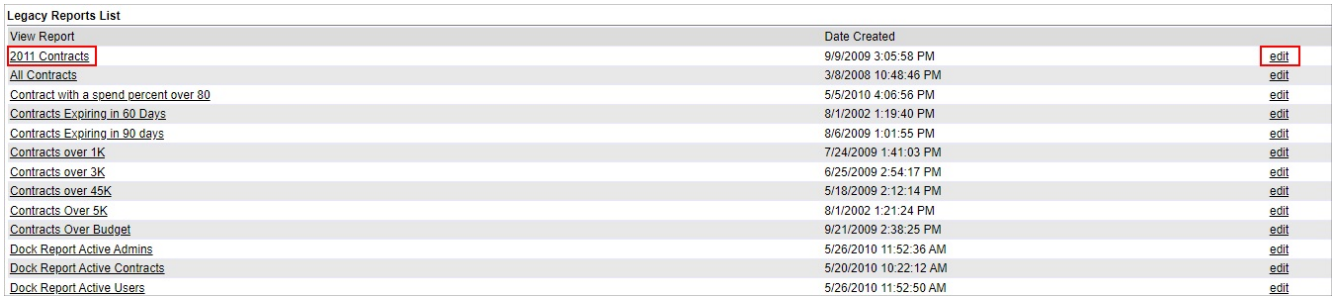




The Custom Reports in this list can be run by clicking the report name. The report still provides the most up-to-date data available.

With upgraded versions of Contract Insight Enterprise Edition, new Reports and Searches can only be created with the new Ad-Hoc Report/Search tool.

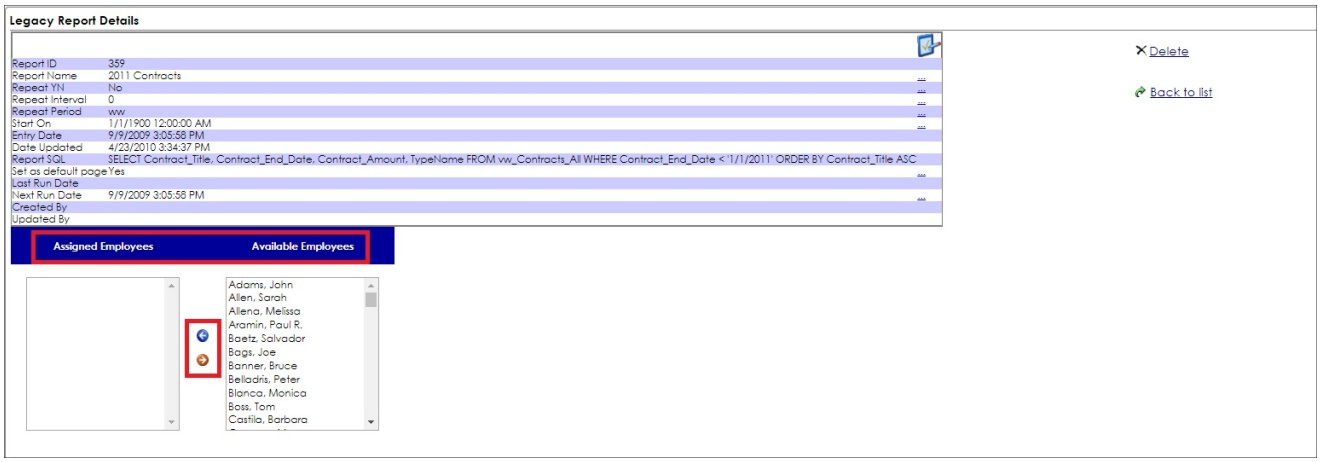
Editing Legacy Custom Reports/Searches is limited to:



1. Editing the **Email Schedule** of the **Legacy Custom Report**.

2. Assigning Employees the permission to view and run this report.

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1. Creating an EZ Report

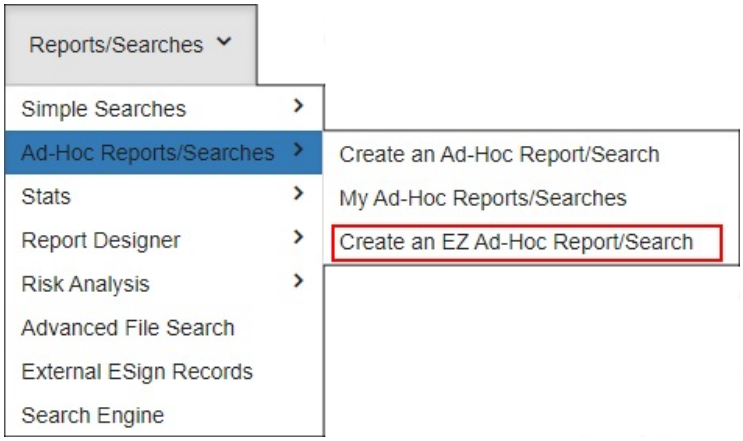
1. Creating an EZ Report

Ad-Hoc Reports: Creating an EZ Report

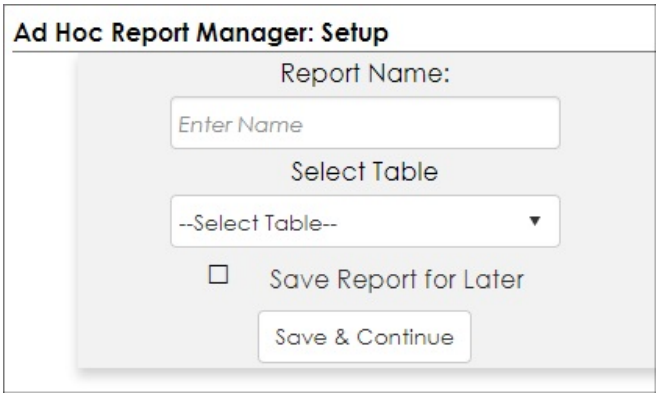
CobbleStone Software provides a quicker solution for generating Ad Hoc Reports on demand with EZ Ad Hoc Reports Field Selection. This will allow for users to quickly generate and view reports using 3 simple steps: **Setup**, **Type Selection**, and **Field Selection**. This report builder is designed to expand on the existing Record Details layout screen by only displaying fields that are associated with whichever type the user selects.

Setup Overview

1. Navigate to **Reports/Searches - Ad-Hoc Reports/Searches - Create an EZ Ad-Hoc Report/Search**. This can also be accessed via the Ad Hoc Report list page by clicking on the side menu item **Create New E-Z Report**.

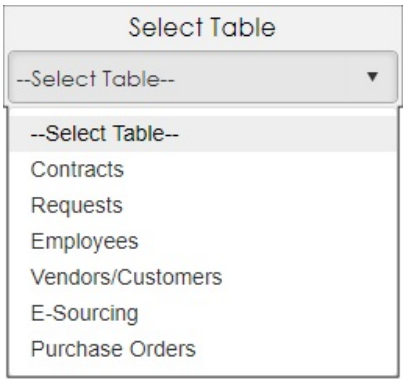


2. Provide a **Report Name**, **Select a Table** against which to report, and decide to **Save the Report for Later** or not.



EZ Reports can be built for the following areas/tables: Contracts, Requests, Employees, Vendors/Customers, E-Sourcing, and Purchase Orders.

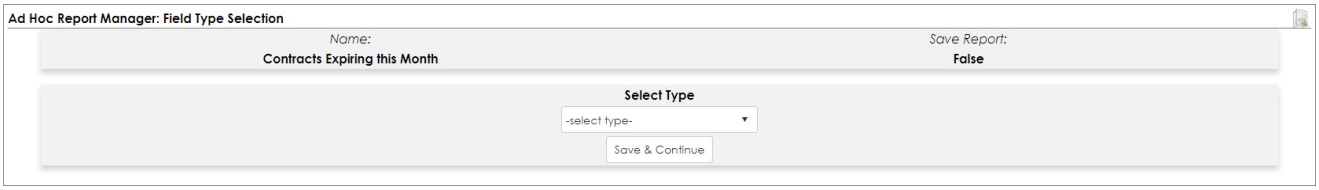
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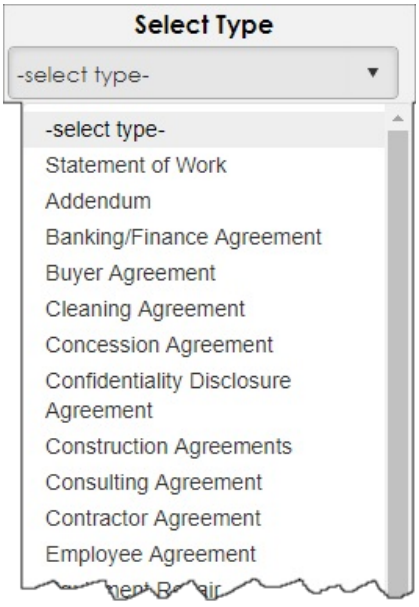


A saved report allows for modification of the report after view/creation and and allows for the report to be customized using all existing report configuration that is available from the **Ad-Hoc Reporting** module. However, a report that is not saved is not be accessible after creation/viewing but does still allow for filters and conditions to be added before viewing and allows for exporting to excel.

3. Click **Save & Continue**.

4. The **Field Type Selection** screen displays. Select which type of record type against which the report is being built.



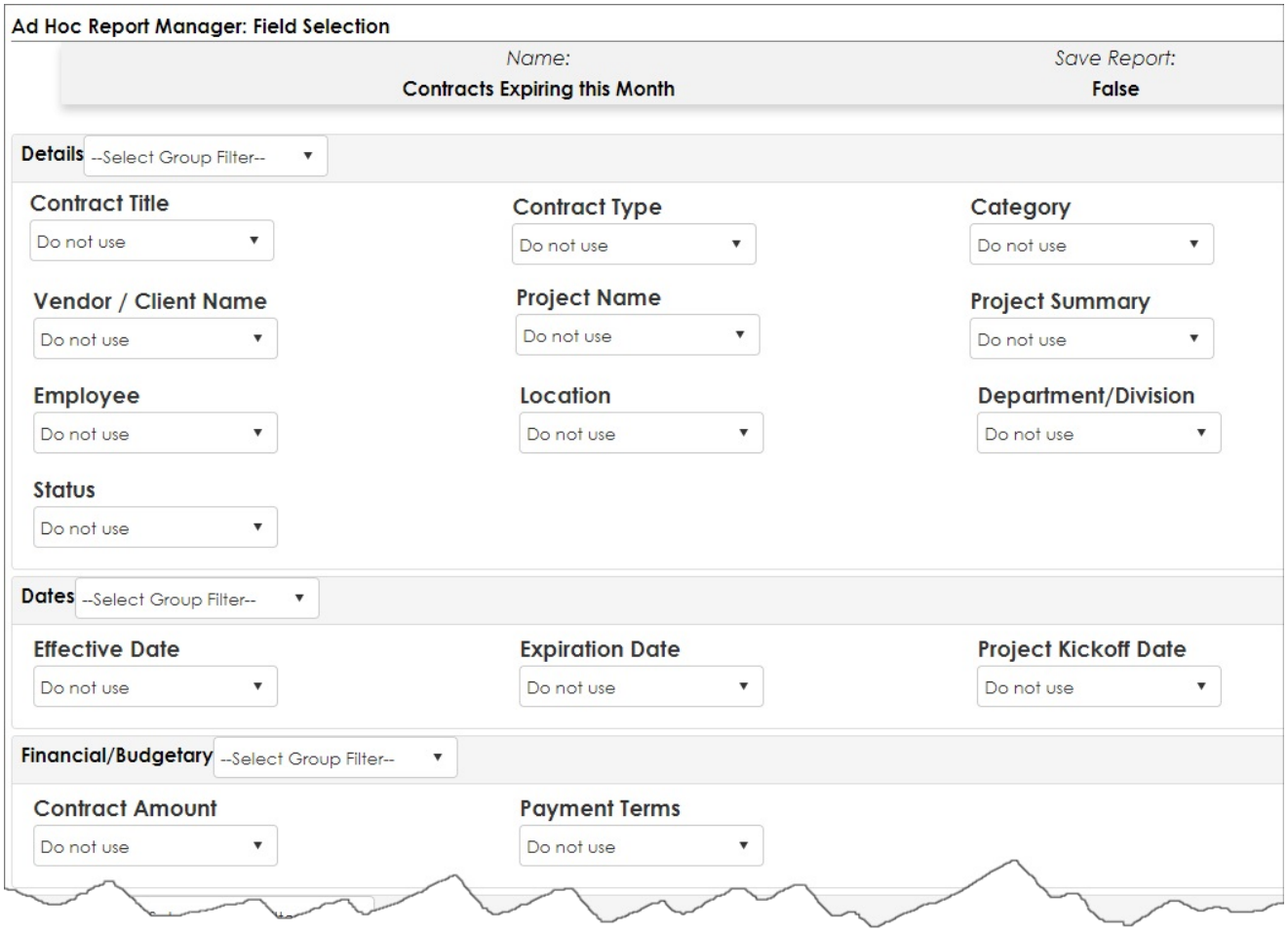


5. Click **Save & Continue**.

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Field Selection

1. The **Field Selection** screen displays.



2. For field groups, select if the group as a whole is to not be used, to be shown on the report, or to be used as a filter for the report.



3. For individual fields, select if the field is to not be used, to be shown on the report, or to be used as a filter for the report.



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4. Click **Add Filters/Conditions** to build rules for the EZ Report. Rules for EZ Reports are built just like those on other Ad-Hoc Reports.



5. When done creating rules, click **View Report** to view the final report.

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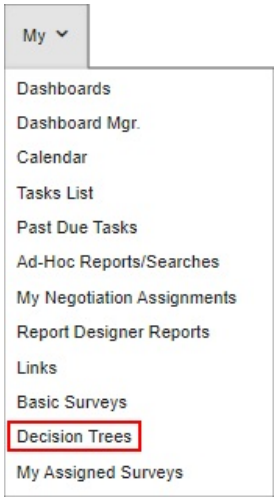
1. Using an Assigned Decision Tree

Using an Assigned Decision Tree

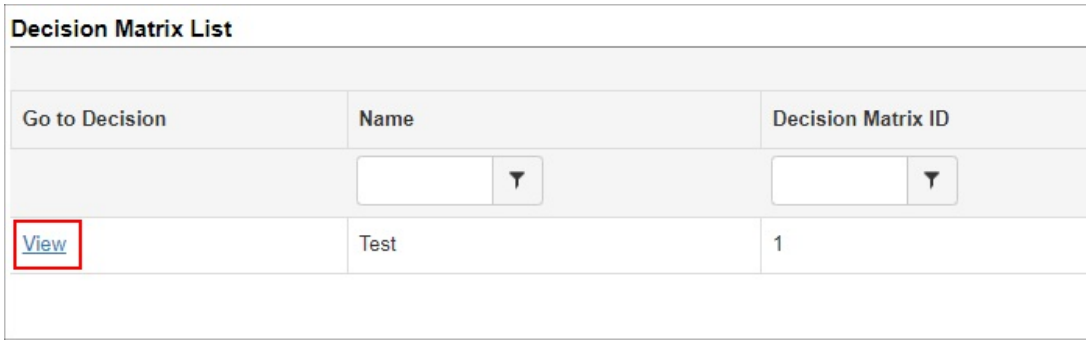
Using and Assigned Decision Tree/Decision Matrix

If assigned a **Decision Tree**, it can be accessed via the **My** menu area.

1. Navigate to all assigned and public Decision Matrices via the top menu: **My - Decision Trees**.

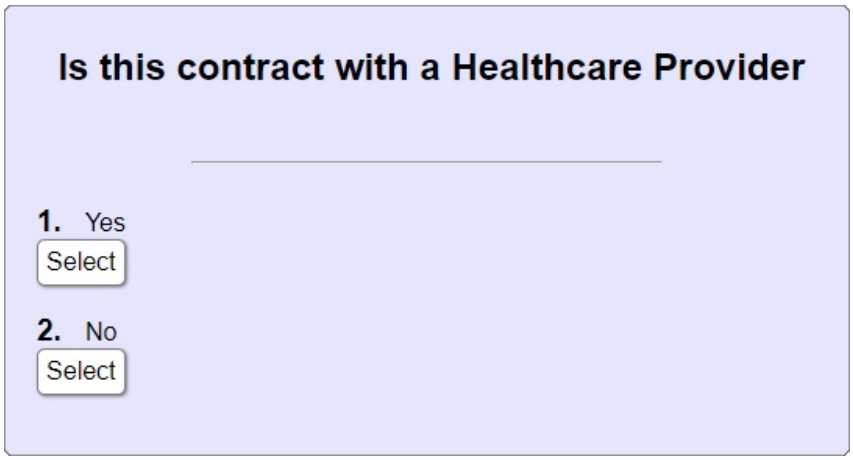


2. All matrices assigned to you display. To run a Decision Matrix, click **View** for the line item.

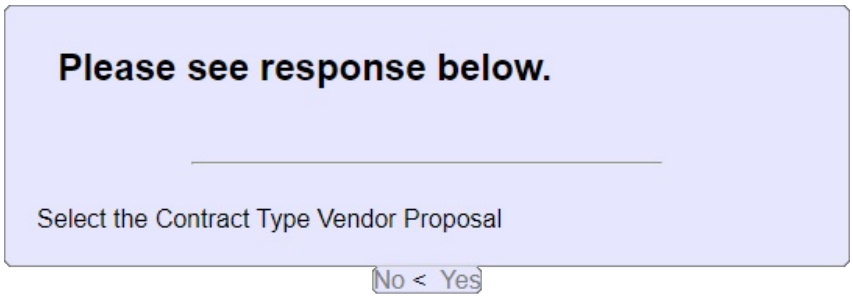


A pop-up on the next screen displays. Select the appropriate answer.

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Follow this process until you get an ending response.



The ending response may contain directions or a URL to follow.

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1. Surveys/Questionnaires: Overview

Surveys/Questionnaires: Overview

Surveys/Questionnaires: Overview

Surveys/Questionnaires allow system administrators to define questions to be used on surveys and questionnaires for Contract, Request, Vendor, Purchase Order, Employee and E-Sourcing Records. These surveys and questionnaires can be made up of as many questions as necessary and include initial question types of radio buttons, check boxes, multi select list, and free text boxes.

Surveys/Questionnaires are built in two primary phases: Question Bank and Survey List. Questions constructed in the bank are populated into surveys in the list.

Created survey templates can be added onto an E-Sourcing record for use with respondents to the E-Sourcing opportunity. The respondents have designated time frames to provide the information and answers to the questions to submit a bid on the opportunity.

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2. Question Bank

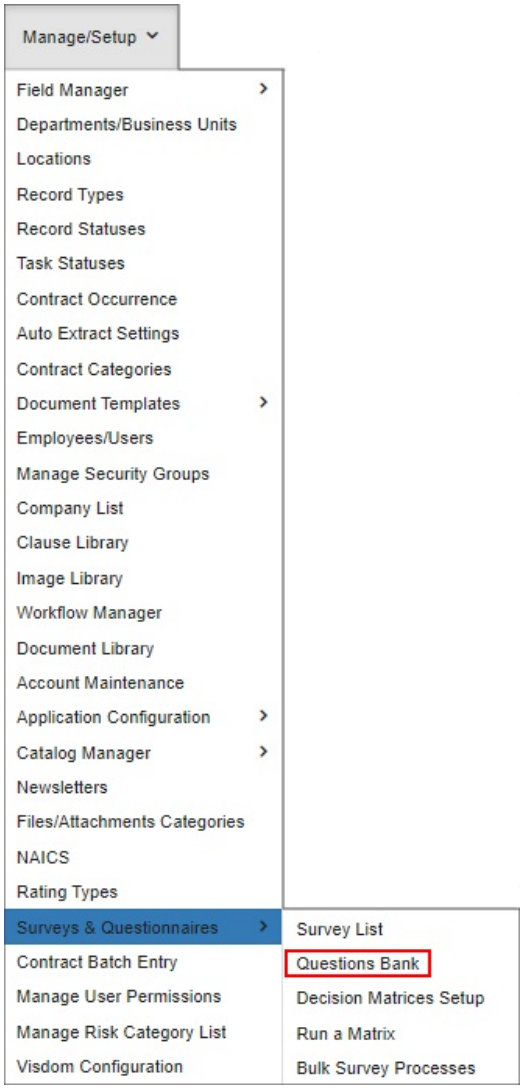
Question Bank

Surveys/Questionnaires: Question Bank

All surveys are built from the questions within the bank. Once created, they can be used to populate a survey.

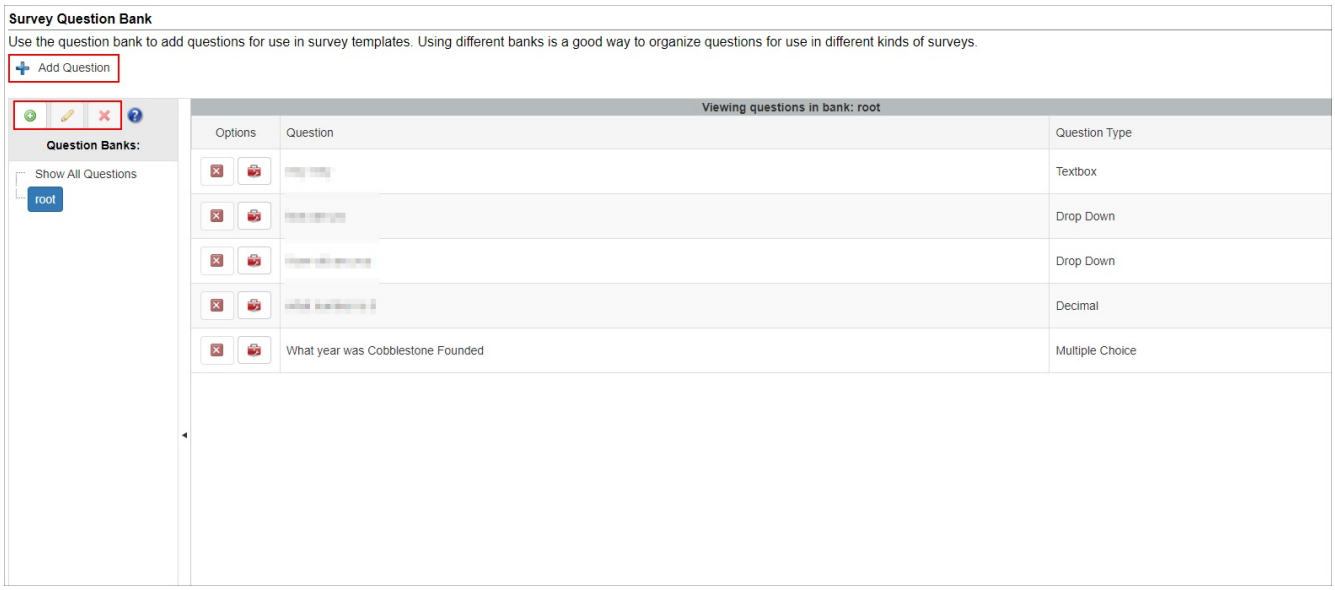
Create Questions

1. To create questions within the Question Bank, navigate to **Manage/Setup** – **Surveys & Questionnaires** – **Questions Bank**.



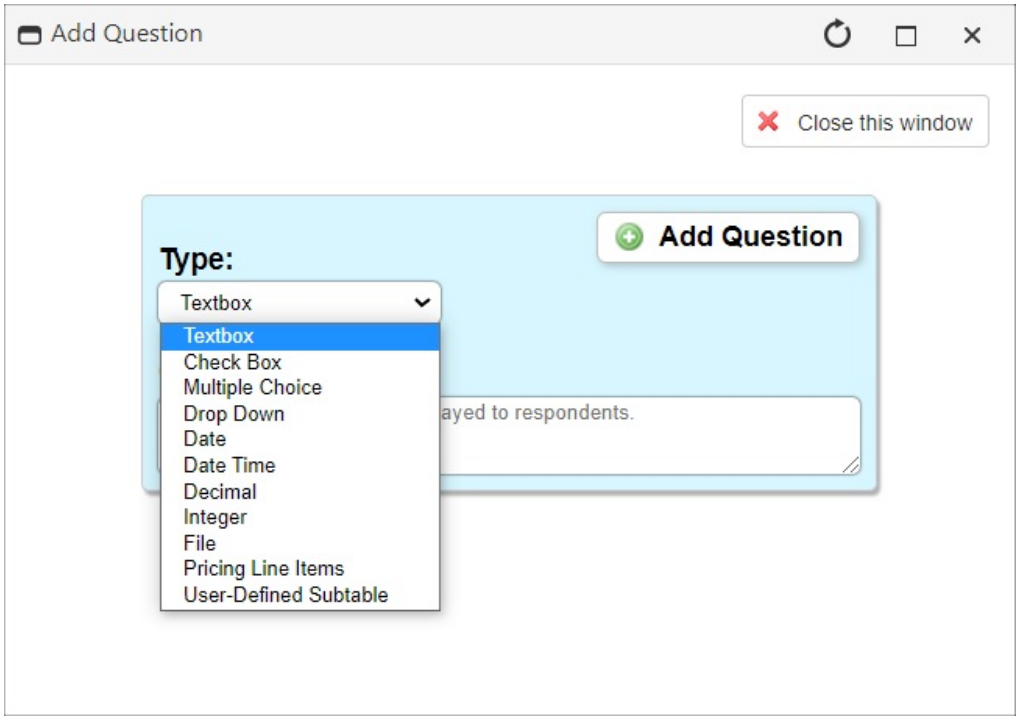
2. Optionally, create a folder for the group of questions.

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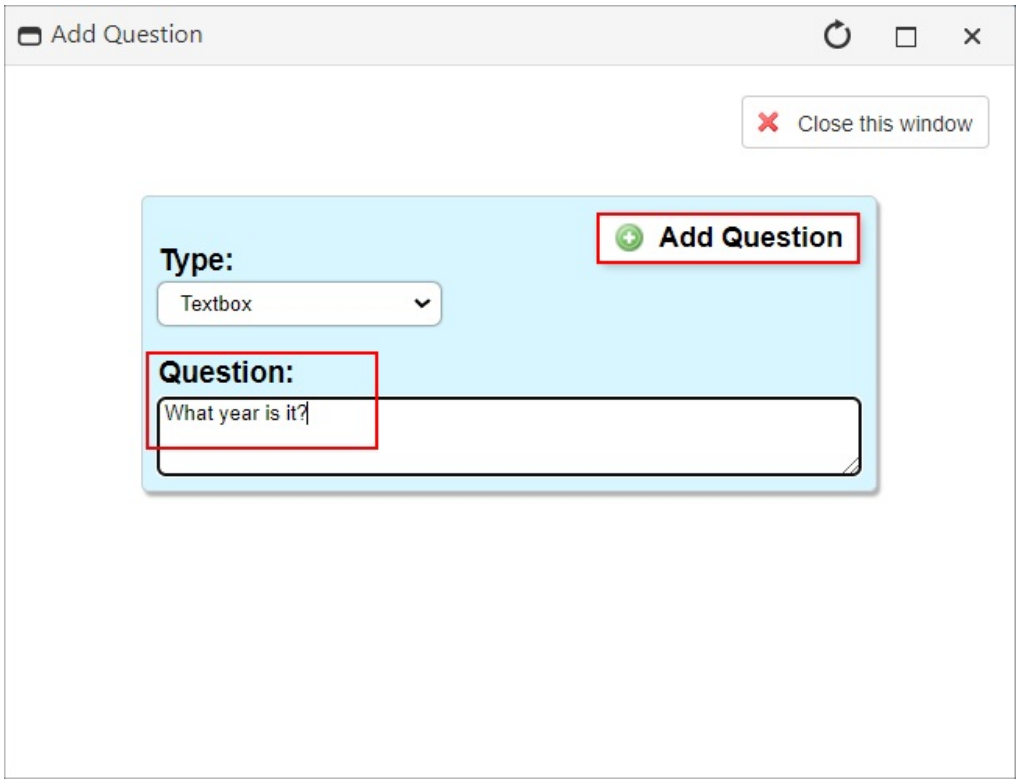
3. Click **Add Question**.

4. A pop-up window displays. From the available pick-list, select the question type (i.e., Text Box, Check Box, Multiple Choice, Drop Down, Date, Date-Time, Decimal, or Integer)



5. Enter the question name and question text.

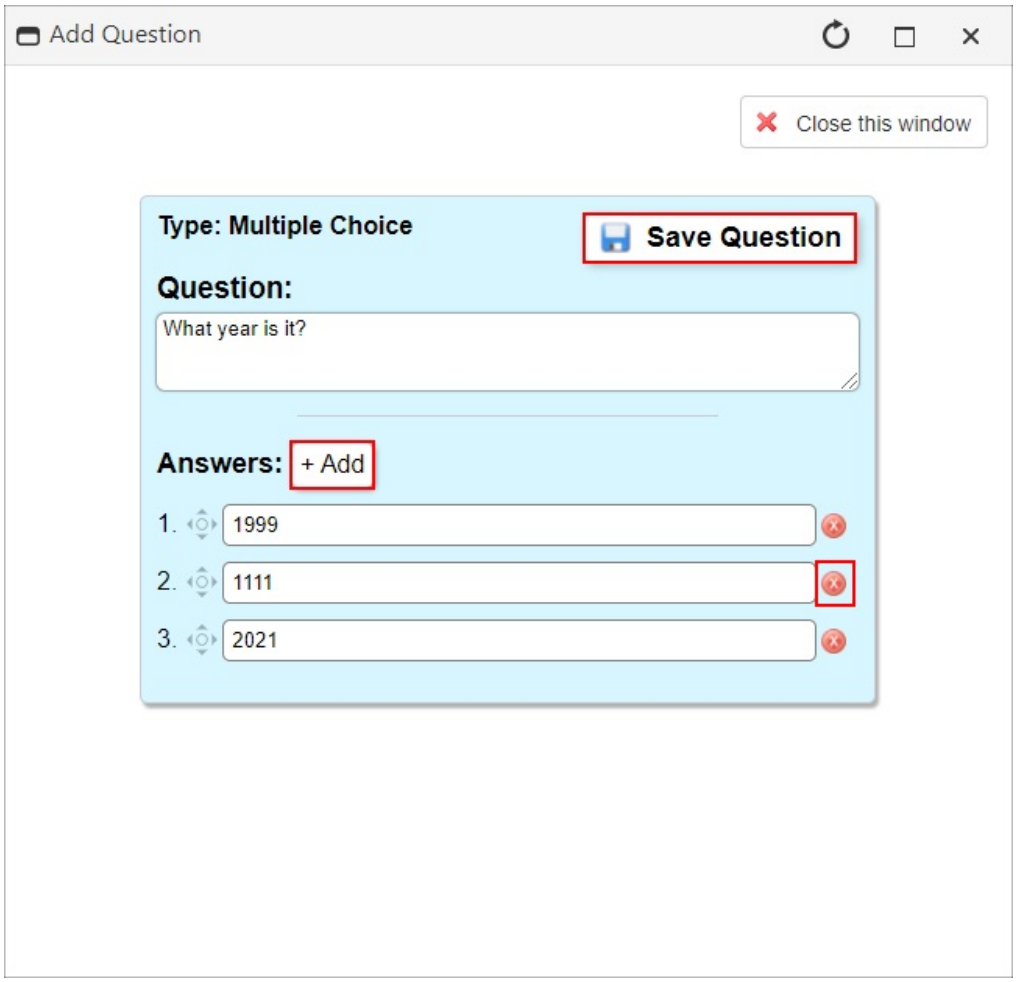
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6. If working with a question type with predetermined selections, click **Add Answer**, enter the answer, and repeat for additional answer selections. Click the **red circular X** icon ( ) to remove an answer.

7. When done entering answers, click **Save Question**.

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8. When completed, close the pop-up window. The question appears in the list.



Edit Questions

Questions and their associated answers can be edited at any time.

1. Click the **red toolbox icon** ( ) for the question line item. A pop-up window displays.

2. Click the **red circular X icon** ( ) to remove an answer.

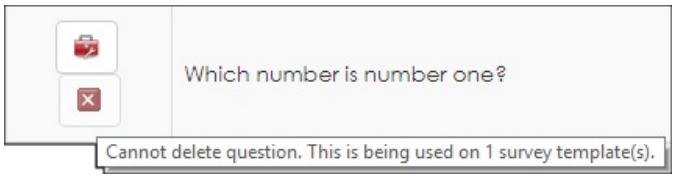
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3. Edit any of the existing items and /or add answers as necessary. Click **Save Question**.

Delete Questions

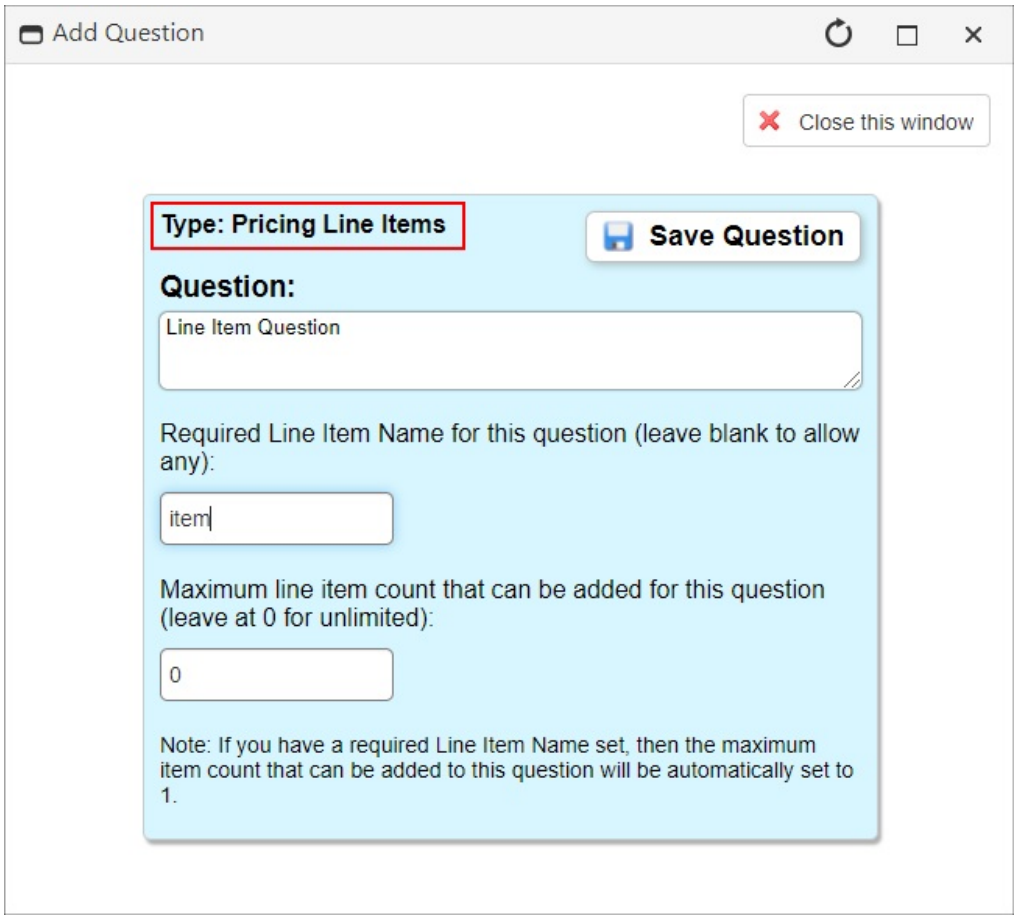
To remove a question from the bank, click the **red square X icon** () for the question line item.

If the question is assigned to a survey, it cannot be removed.



Line Item Questions

CobbleStone has a special question type that allows pricing lines to be defined for a specified line item, the Price Line Item question type.



This question type consists of a numerous items:

A. The text for the question

B. A predefined Item. This can be left blank to allow survey takers to fill in the item themselves.

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C. The maximum number of entries that can be added for the specific question.

Note: For more information on Questions and Surveys, please see the wiki page for Surveys/Questionnaires: Overview.

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3. Survey List

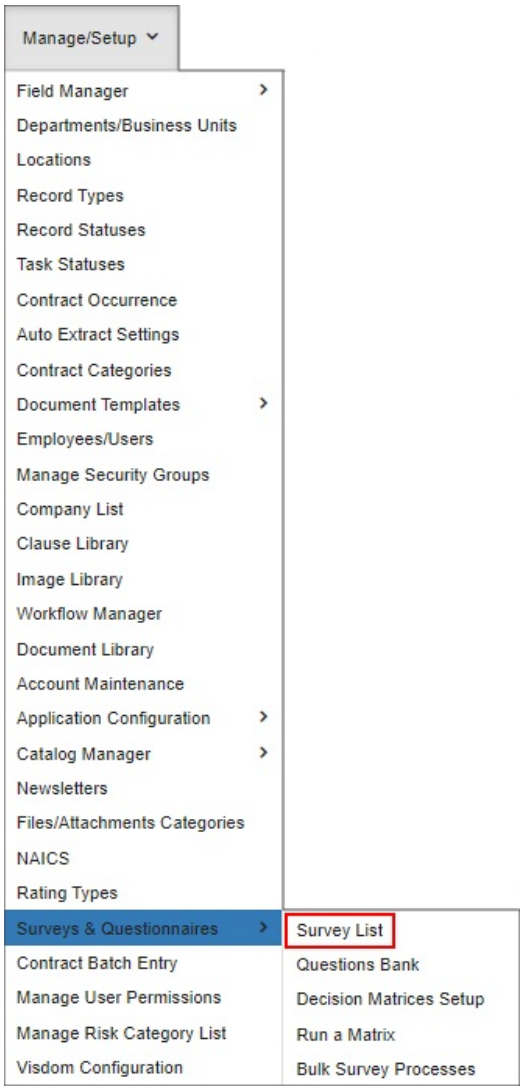
Survey List

Surveys/Questionnaires: Survey List

Surveys/Questionnaires are essentially envelopes for questions. To use the questions, a survey/questionnaire must first be built to house them. The survey itself is then associated with a record.

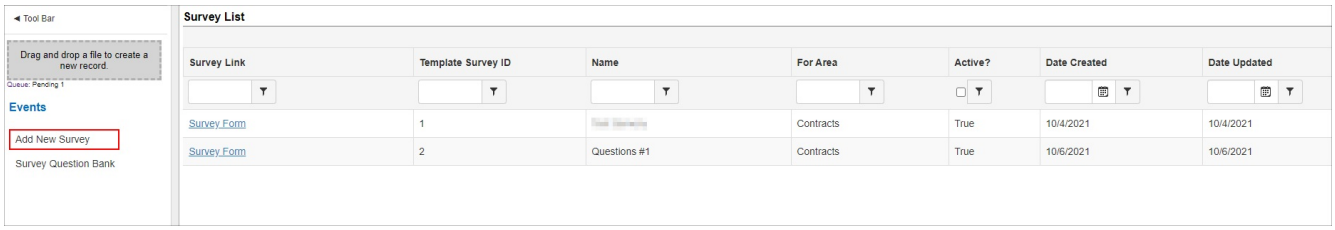
Create Surveys

1. To work with surveys, navigate to **Manage/Setup – Surveys& Questionnaires – Survey List**.

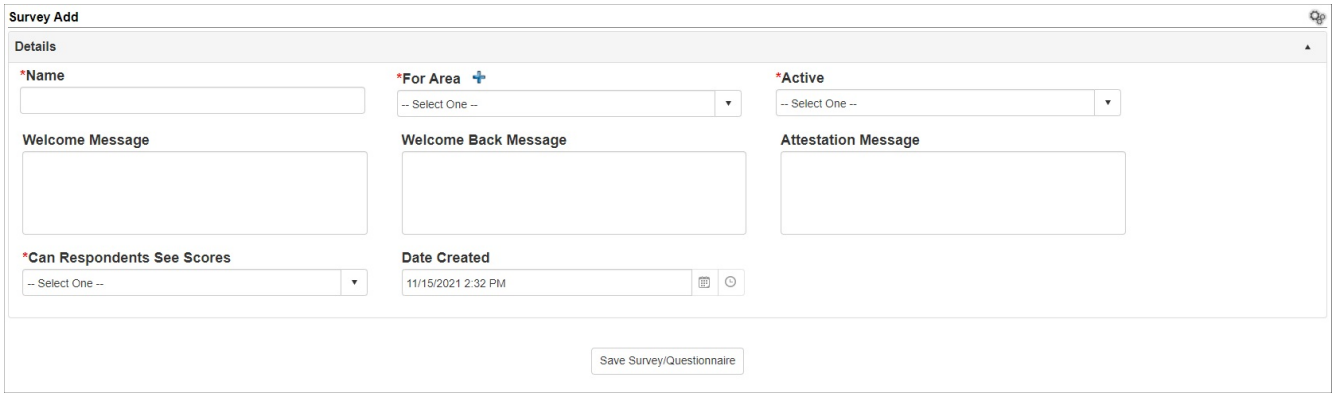


2. On the side menu, click **Add New Survey**.

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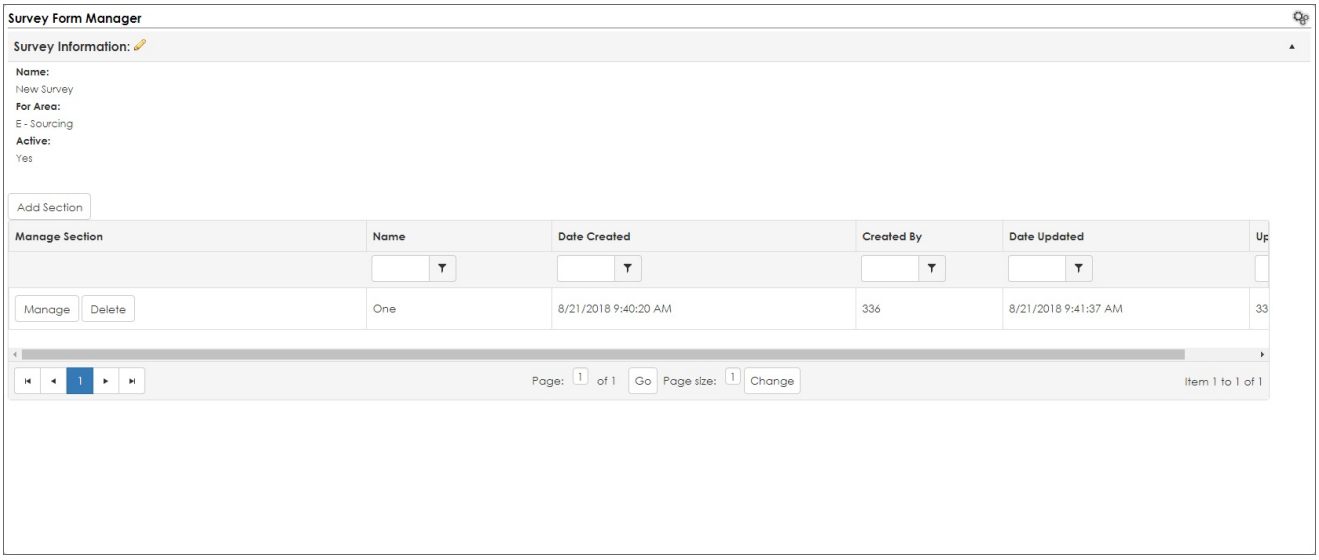
3. Give the survey a **Name**, select the **For Area**, toggle **Can Respondents See Scores**, and mark the survey as **Active**. Optionally, fill out the desired messages. Click **Save Survey/Questionnaire**.



Add Survey Sections

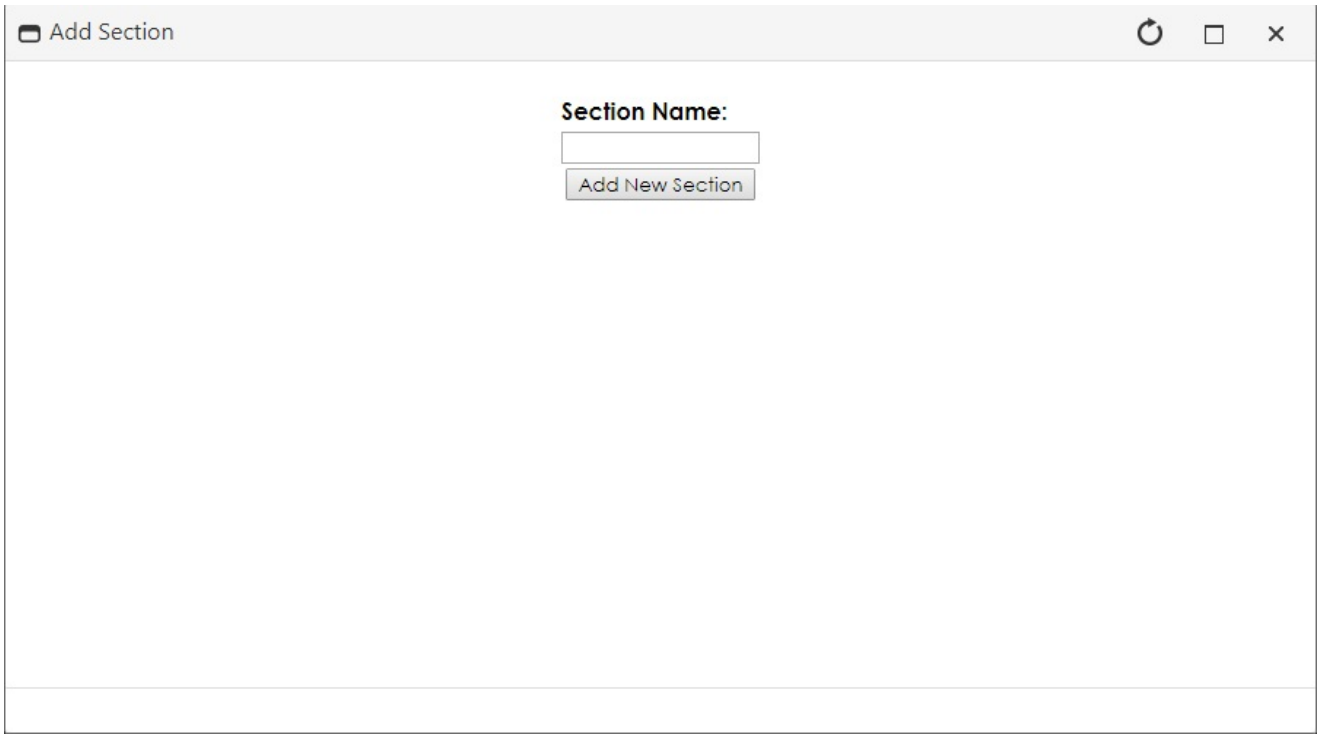
1. Click Add Section a section to the survey/questionnaire. A pop-up window displays.

Note: Each survey/questionnaire must contain at least one section.



2. Give the section a name, click **Add New Section**, then close the pop-up window.

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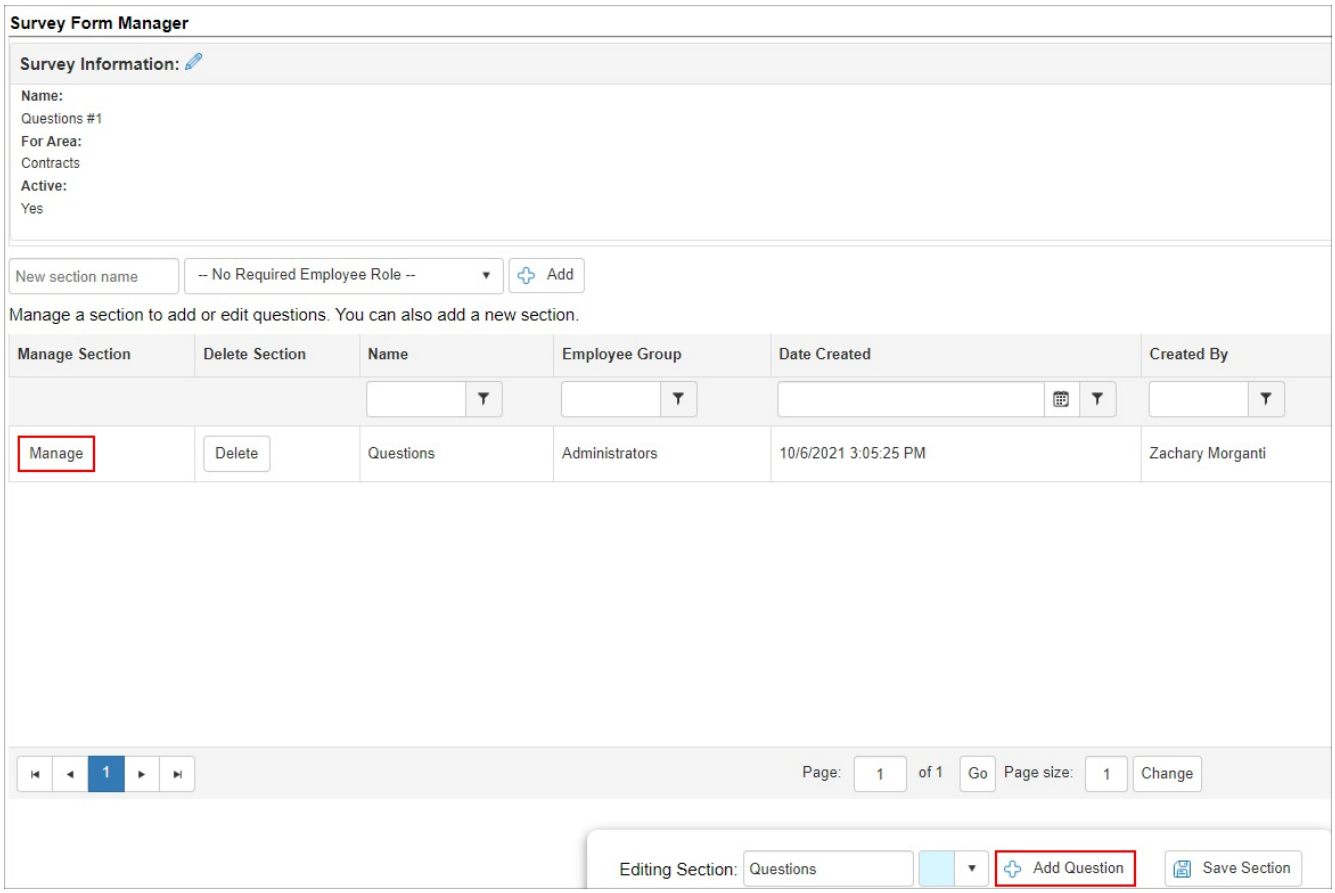


Add/Remove Questions to Survey Sections

1. Click **Manage** for the section to which to add questions. The section displays at the bottom of the screen.

2. Click **Add Question** to open the **Add Question** pop-up window.

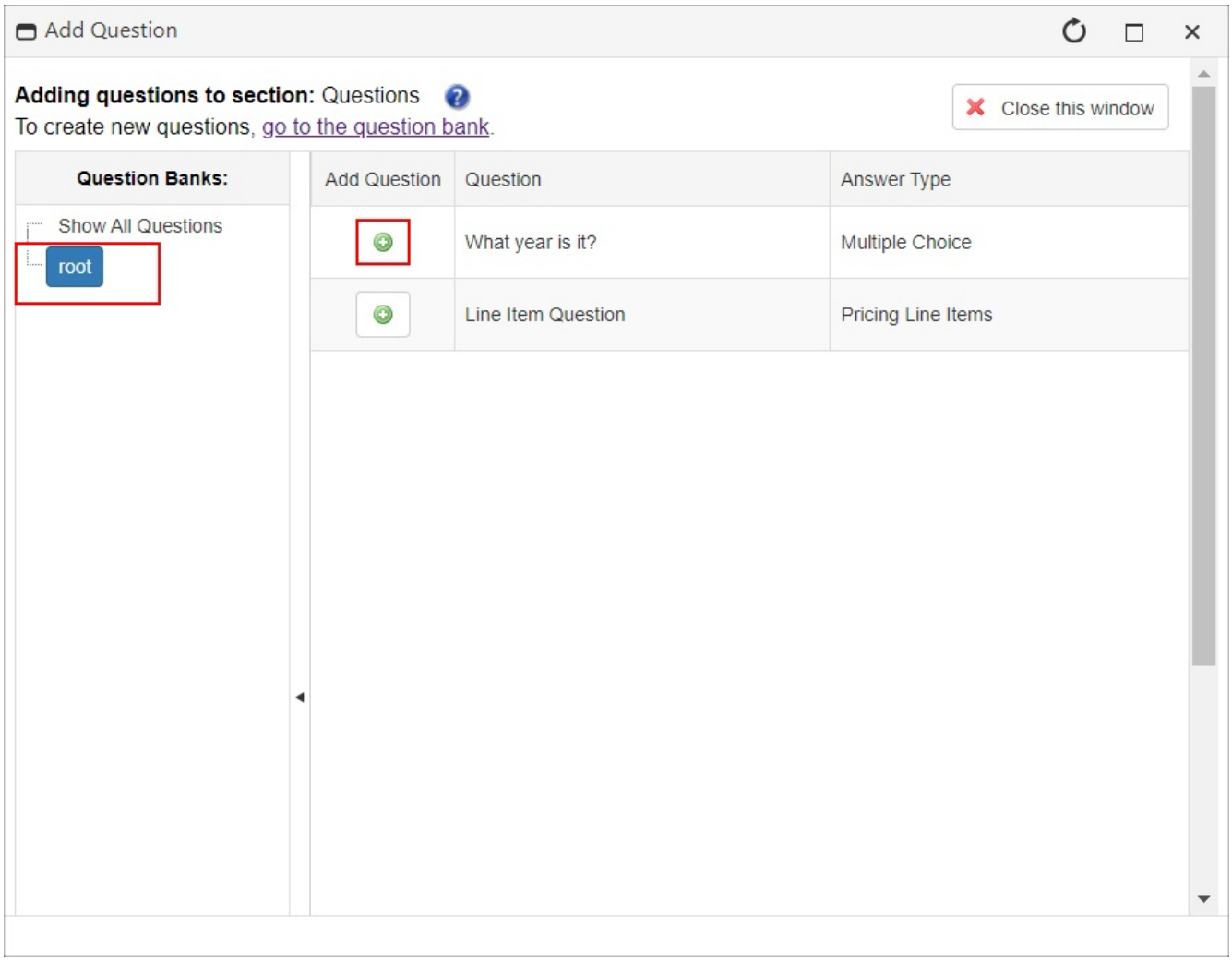
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3. Click the folder containing the question(s) desired.

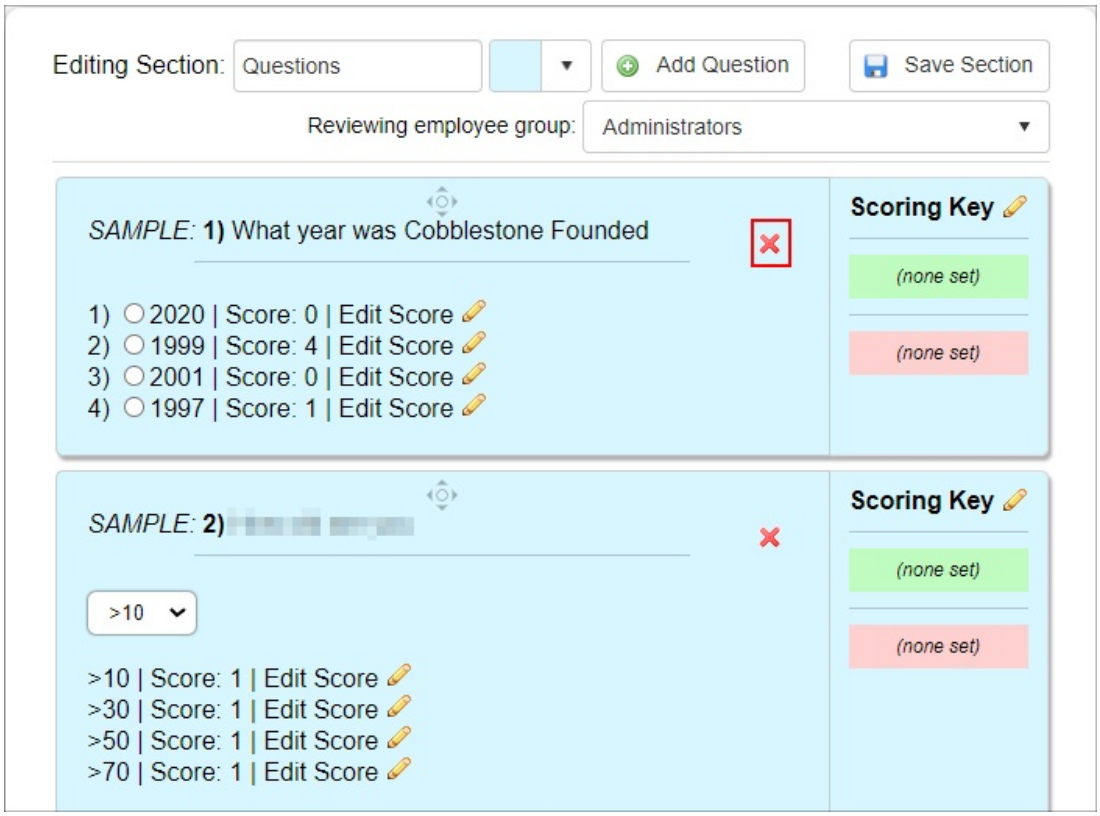
4. Click the **green plus icon** () to add a question.

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5. Remove an existing question by clicking the red X icon in the side of that question.

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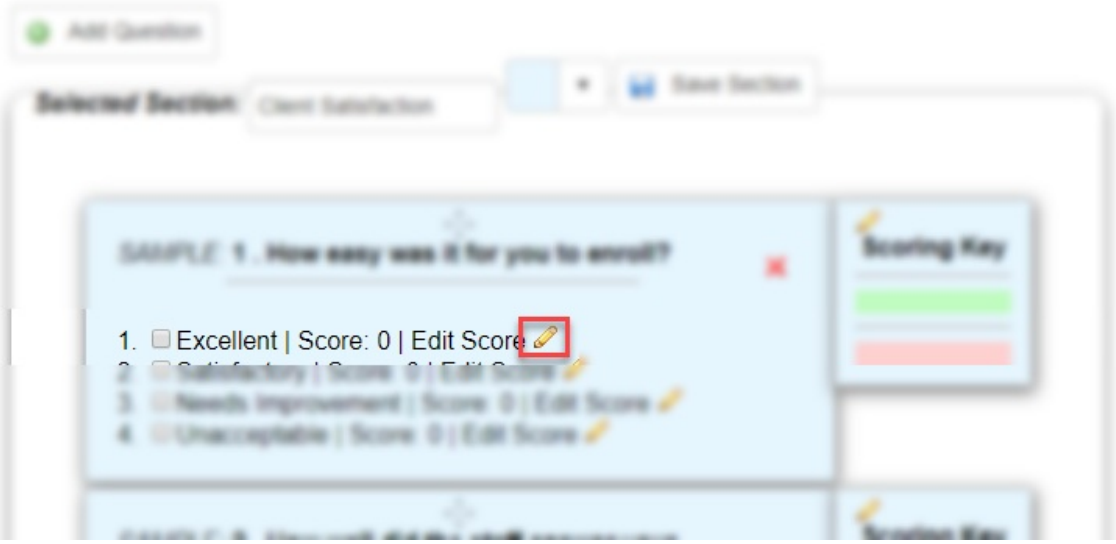


Scoring

Surveys can be scored using the following question types: Drop Down, Checkbox, or Multiple-Choice

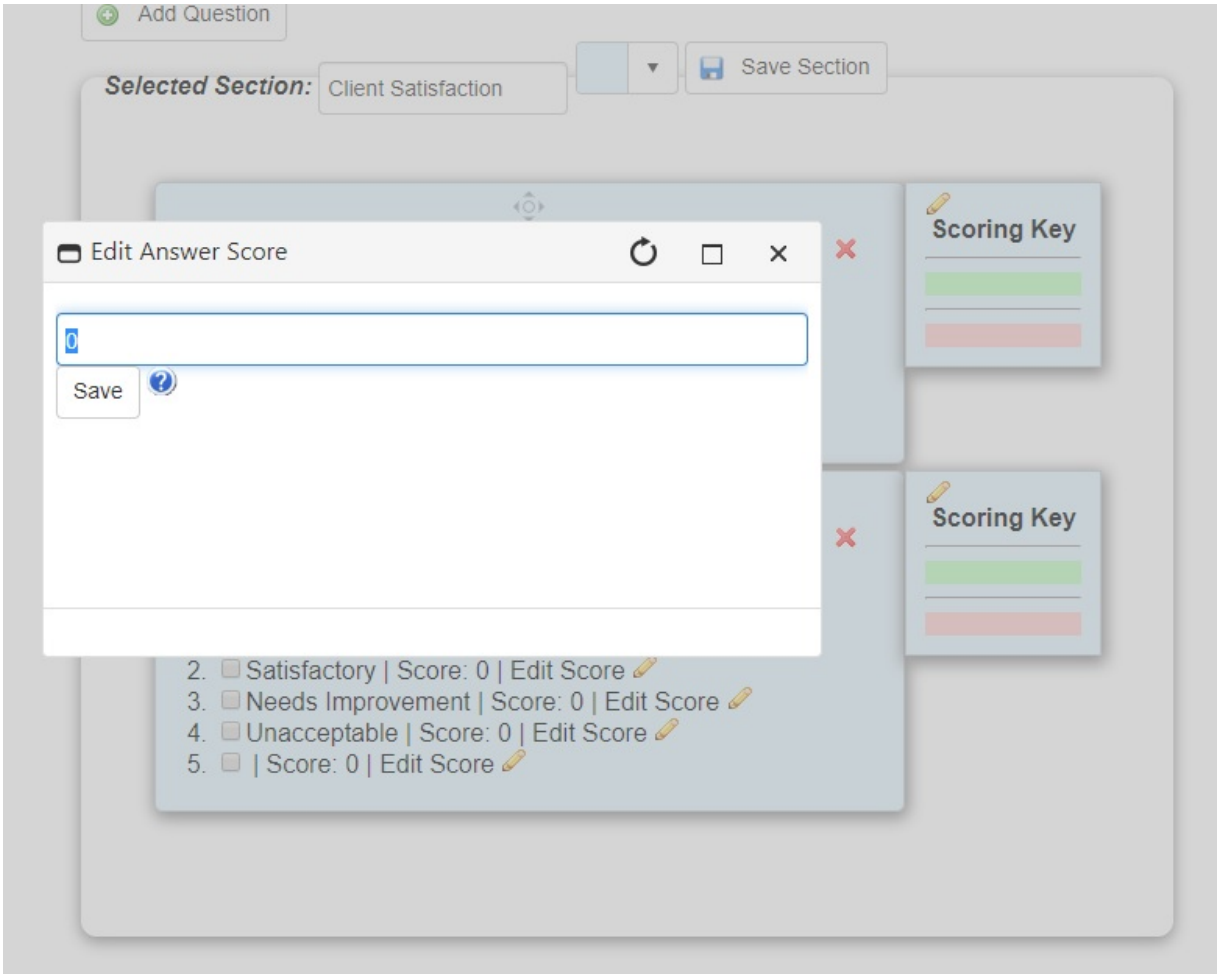
Add Scoring to Survey Question

1. **Click the pencil icon** next to an available response

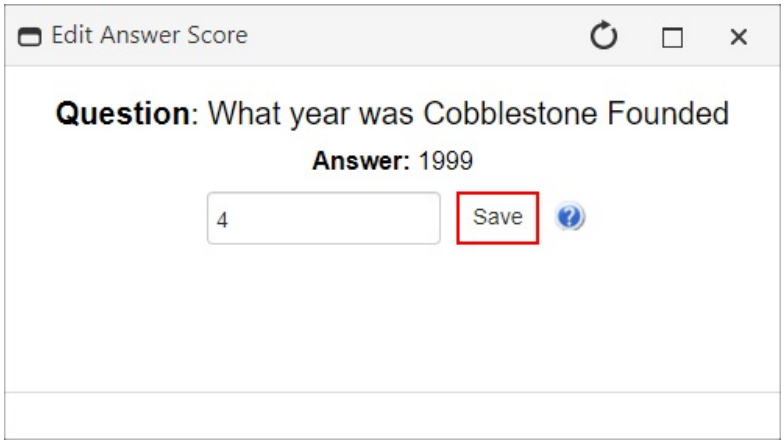


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2. **Enter the numeric value** of the response



3. Click **Save**

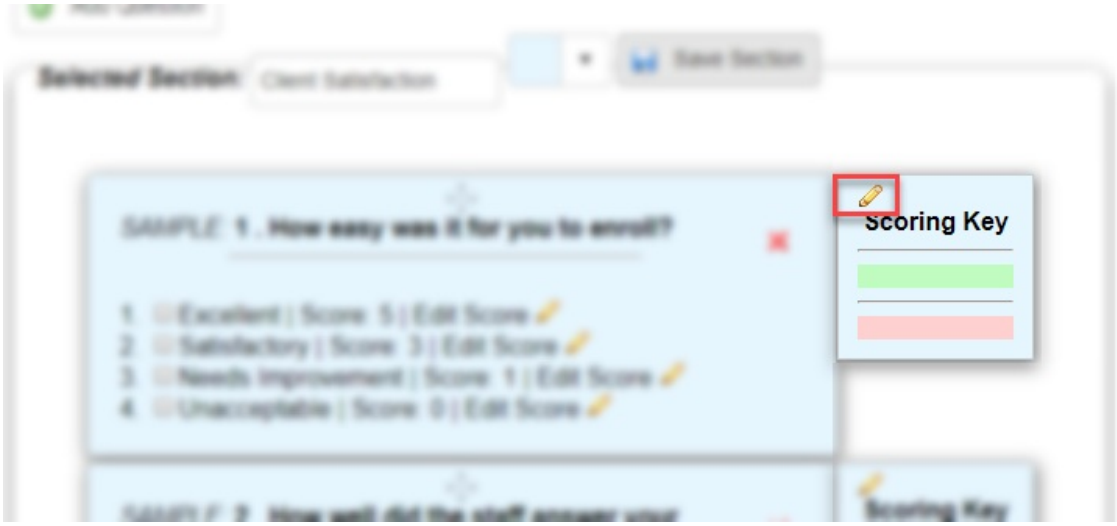


4. **Repeat** for each available response

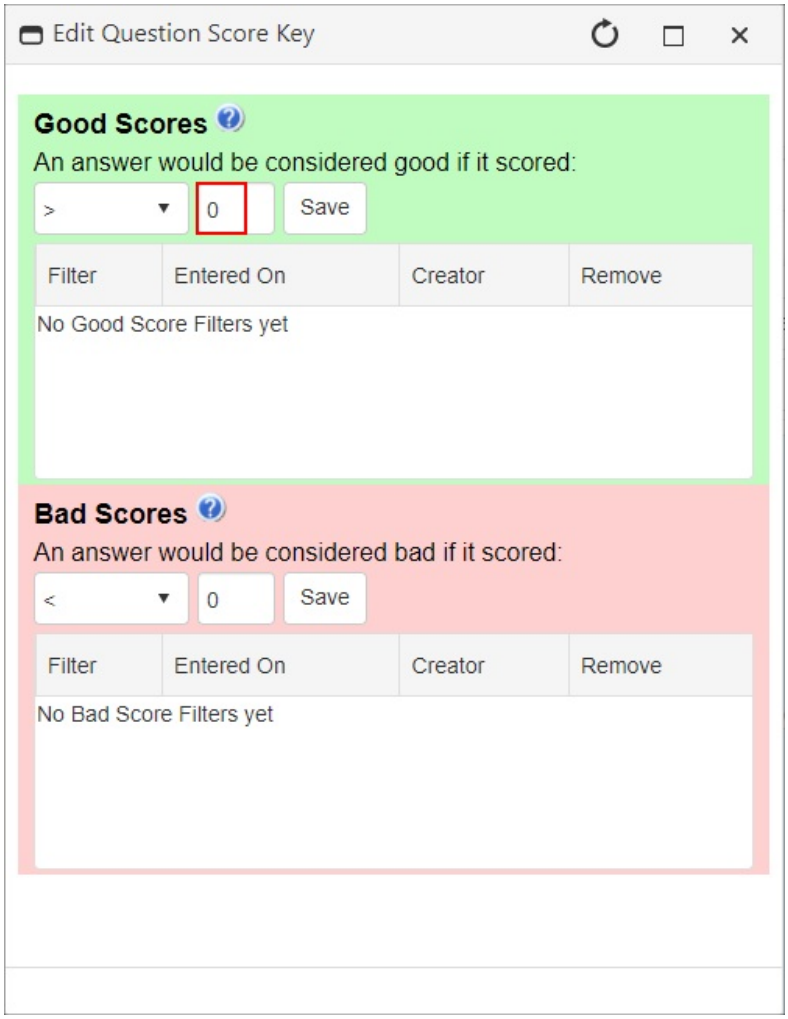
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Setting the Scoring Key

1. Click the **pencil icon** on the question's Scoring Key.

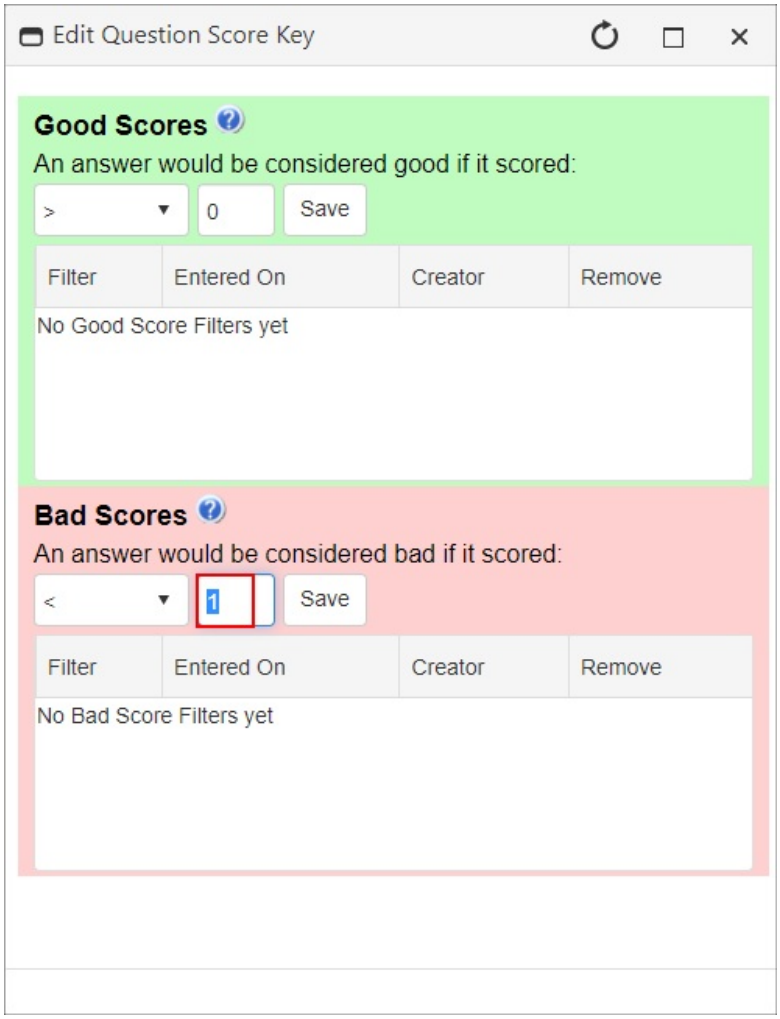


2. **Set the calculation** for the Good Scores and click on **Save**.



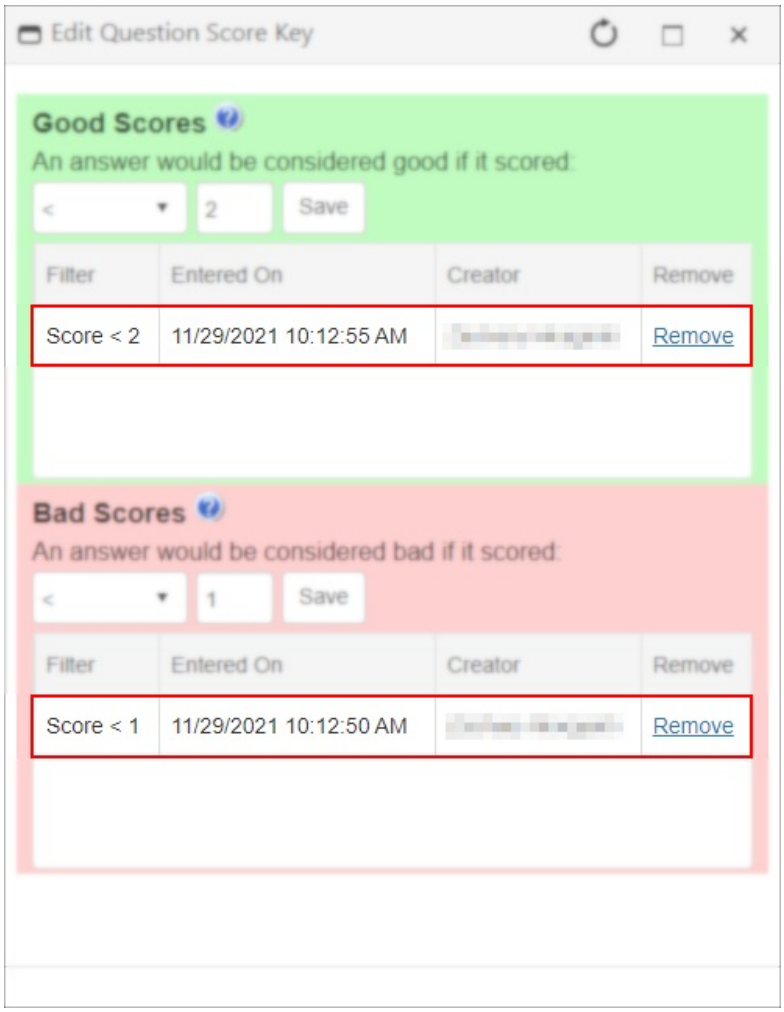
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3. **Set the calculation** for the Bad Scores and click **Save**.

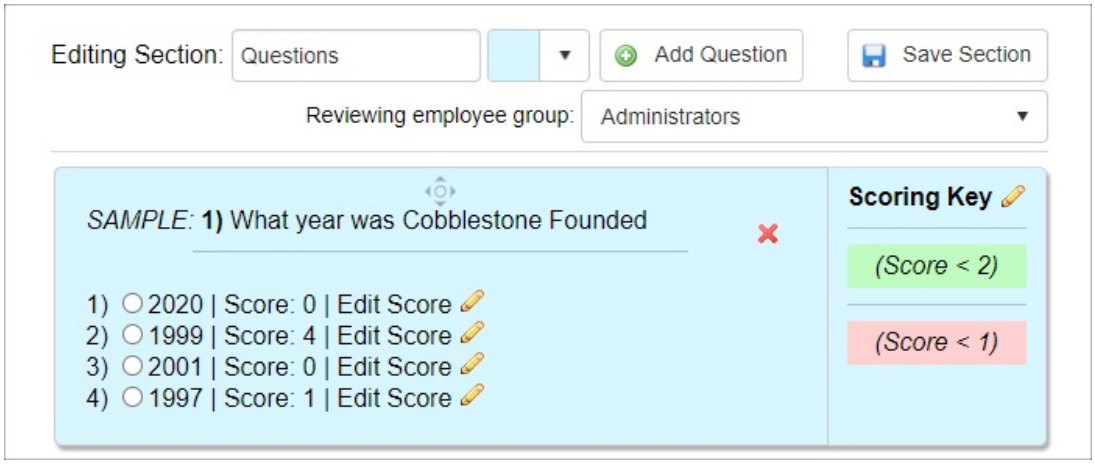


4. **Click the X** in the top right of the pop-up window to close.

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5. The **Scoring Key** will be updated to show what determines a good/bad score for that question.



6. Repeat for each survey question to be scored.

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4. Add/View a Survey on a Record

Add/View a Survey on a Record

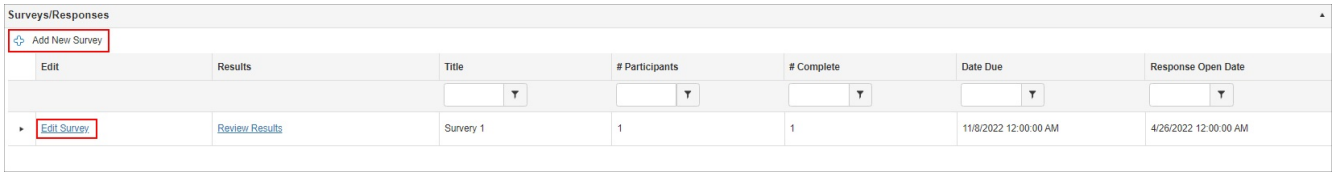
Surveys/Questionnaires: Add/View a Survey on a Record

Once a survey/questionnaire has been created, it needs to be applied to a record for the appropriate parties to complete.

Add/Edit a Survey

1. Navigate to the record in question and scroll down to the **Surveys & Responses** area.

2. Click **Add New Survey** to add a new survey/questionnaire to the record. Click **Edit Survey** for the line item to edit an existing survey/questionnaire.



3. Provide or edit the Respondent Type*, the Survey selected, the Survey Title, the date on which answers are due, and if required by the organization, the date upon which responses are viewable, the Response Open Date, as applicable.

*Note that Respondent Type cannot be changed if the Survey is being added to an Employee record.

4. Click **Add Survey** (if editing, click **Save Survey**).

5. The record's details screen displays with the survey added/edited. An email will automatically be sent to the selected respondents when adding a survey.

View Respondents

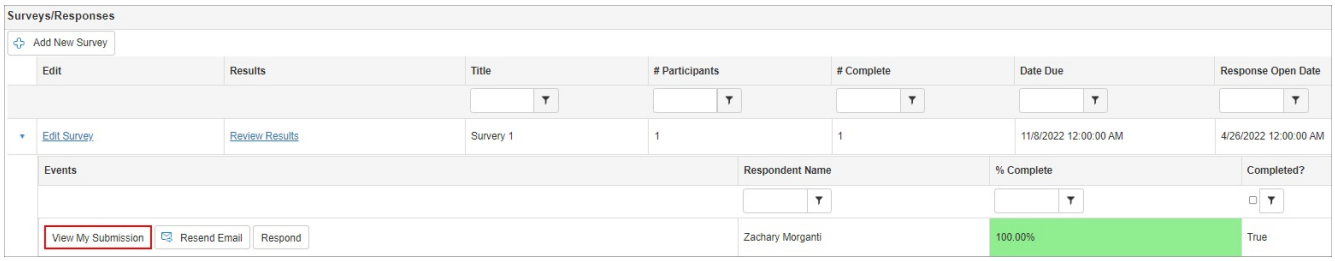
1. To determine who has/has not responded, click the **blue arrow** on the left of the survey line item.



2. A line item for each respondent opens displaying the **vendor name**, the **percentage complete**, and **completed** indicator.

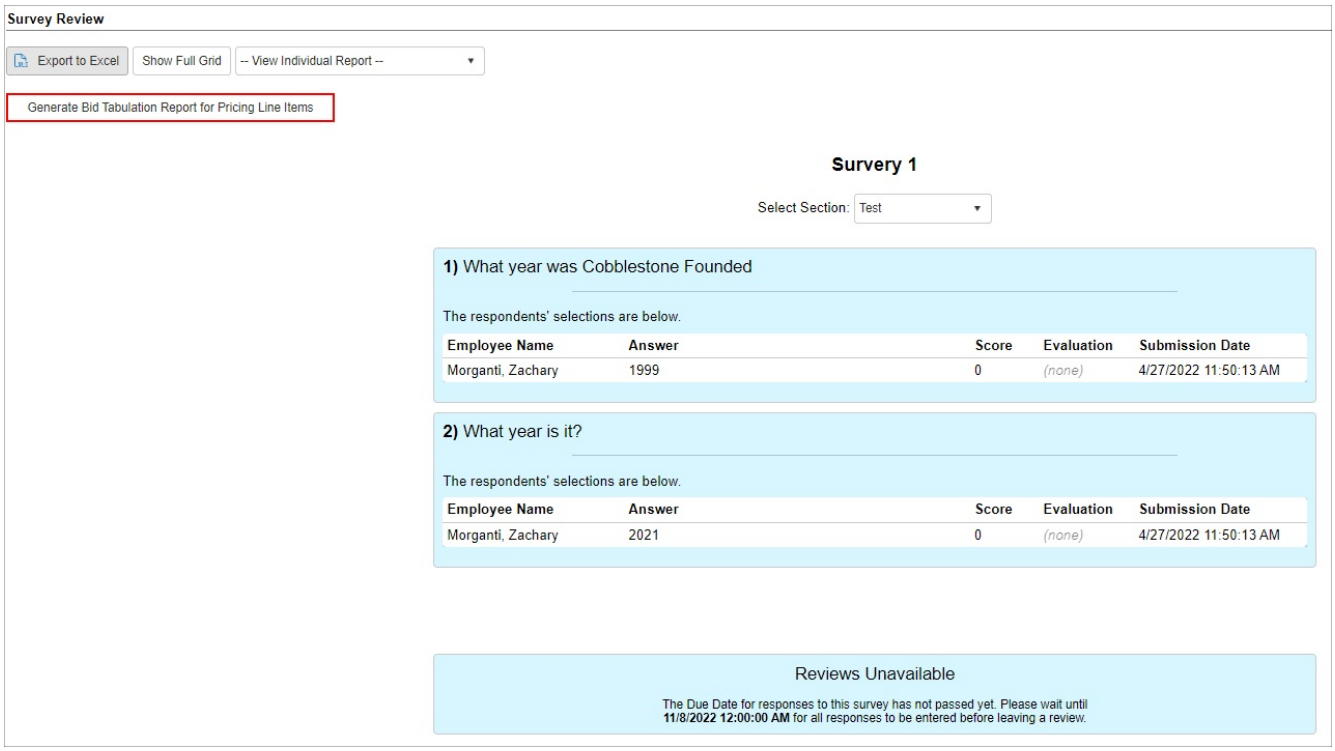
3. Click **View** to review the respondent's answers to the survey/questionnaire questions.

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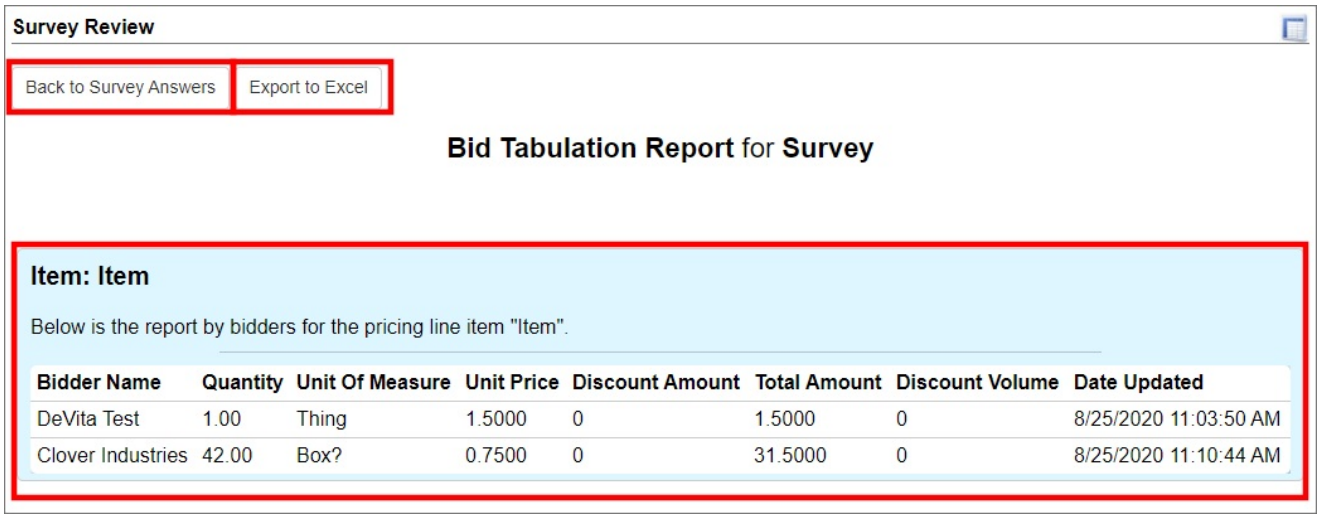
Note: If the survey/questionnaire has not been completed, the answers are not available for that respondent.

Scroll down to view the answers for the selected section.



Click **Generate Bid Tabulation Report for Pricing Line Items** to generate a report specifically for line item questions.

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The line items display.

Click **Back to Survey** answers to return to the fill list of questions and answers.

Click **Export to Excel** to export the results into an Excel file.

Note: The example above has only one line item question, so only one section displays. If more line item questions are a part of the survey, additional sections display.

Add Survey Section Rating/Comment

Users may scroll to the bottom of a given survey and leave ratings and comments on each survey section. The ratings have simple permission systems to remove any chance at bias within reviews. The user reviewing cannot see other section's reviews until they have submitted their own. Once a review is submitted, it cannot be edited or altered.

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5. Assign/Un-Assign Users to a Survey

5. Assign Users to a Survey

Users may be assigned to surveys on contract records, vendor records, etc. If assigning a survey to an individual's employee record, they will automatically be assigned. However, the user must assign others to a survey on more general records, like contracts and/or vendors.

While creating the survey, the user must select a *Respondent Type.* **Assigned Vendor** (the counterparty record that the survey is being assigned on) or **Internal Employees** may be selected.



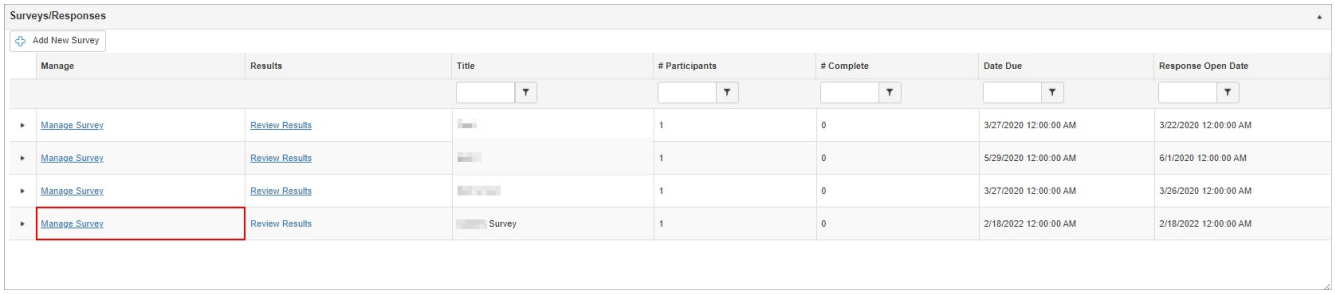
If selecting **Internal Employees**, the user must pick from an additional set of options. Users will choose from one of, or a combination of **Employee Assigned** (the person in the Employee field on the record), **Additionally Assigned Employees**, **Employees Assigned to Record's Department(s)**, and/or **Pick Specific**. If picking specific employees, an employee list will populate for users to assign the applicable employees.



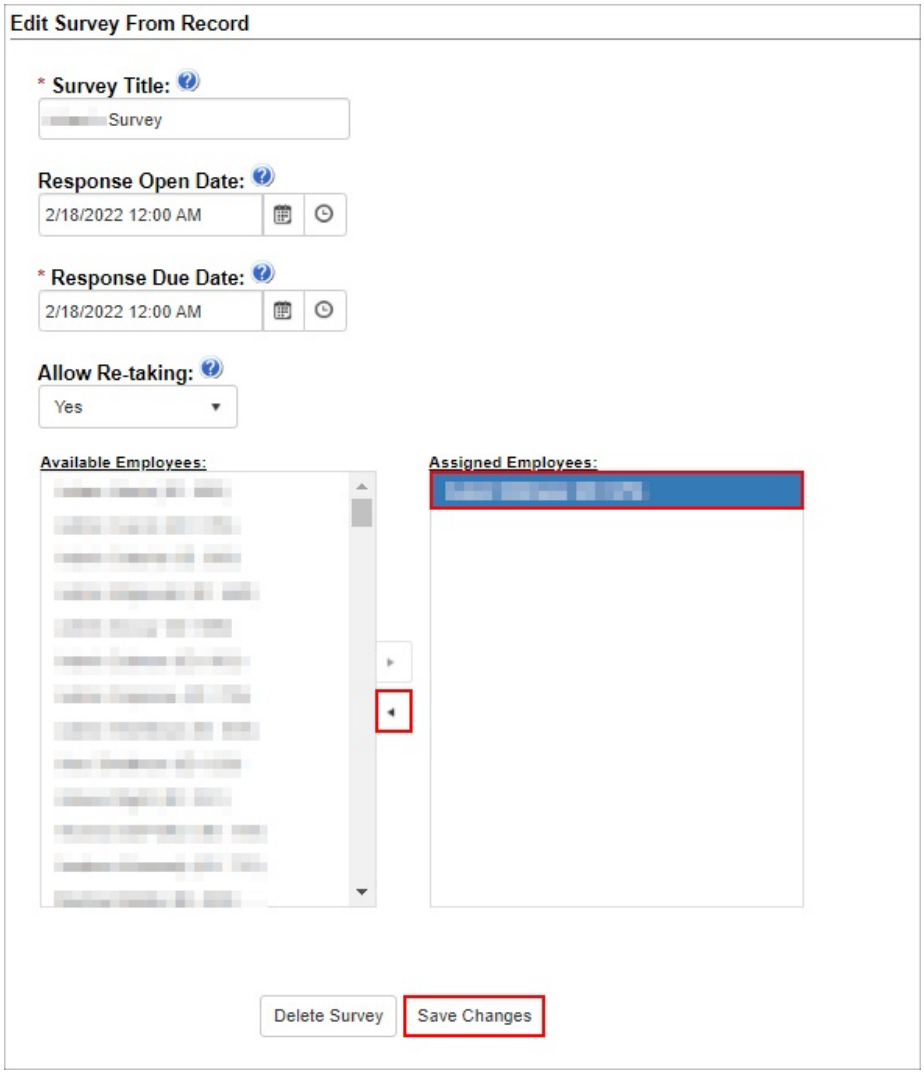
If the survey has been created in the past, users may still add employees, while maintaining the previously selected *Respondent Type*.

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On the record, navigate to the **Surveys/Responses** sub-table. On the survey to which must be assigned to others, click **Manage Survey**.



If the assignment selection upon survey creation was set to **Pick Specific**, an employee list will show. Assigned employees will show in the right-hand table, titled *Assigned Employees*. To **assign** users to the survey, click their name in the *Available Employees* table. Once their names are highlighted, click the arrow pointing to the neighboring table. To **un-assign** users from the survey, click their name under the *Assigned Employees* table, and click the arrow pointing to the neighboring table. **Employees may only be unassigned from a survey if they have not yet began responding to the survey.** Once the desired changes are made, click **Save Changes** at the bottom of the page.



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Hiding Surveys

Hiding Surveys

Enabling App Config

Navigate to **Manage/Setup** > **Application Configuration** > **Config Settings** > **Area: General System** > **Group: Surveys**

There is a setting named **Hide Surveys/Responses Panels Conditionally** if set to true, will hide the surveys section on the Vendor/Client Gateway if the vendor does not have any surveys. It will also hide the surveys section in the core system if the user does not have permission to add a survey to a record. Otherwise, when set to false, will show the surveys section on the V/C Gateway and in the core system to everyone at all times.

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Document Templates Overview

Document Templates Overview

Document Templates: Overview

The Document Authoring Module allows administrative and authorized users with the proper permissions to add and manage document templates that can be generated onto contracts and committals, purchase orders, requests, solicitations and procurement, vendors/customers, and employees/users.

Contract Insight offers the ability to use **Internal** and **Third-Party** Templates.

Defining the Two Types

The files and documents that are created and managed by your organization are termed **Internal** or **standard** document package templates.

The files and documents that are sent or provided to you by your vendors, customers, providers, suppliers, etc. are termed **Third Party Paper**< document package templates.

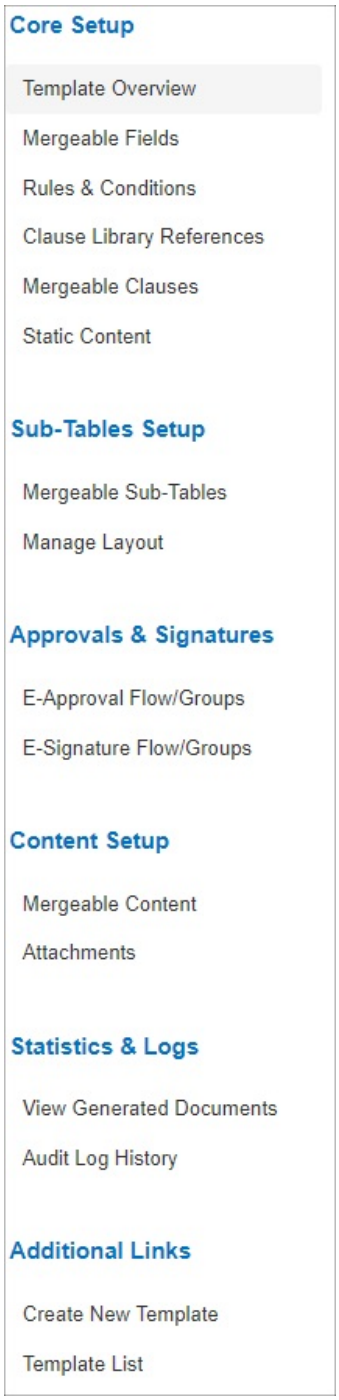
The major difference within Document Authoring between **Standard** and **Third-Party Paper** document package templates has to do with the setting up and management of attachments/files on the template.

Explaining the Difference

However, the same standard process cannot be used when the documents are being sent to you by one of your vendors, customers, providers, suppliers, etc. This is because the documents being sent to you are in fact being managed by the third party. This is where **Third Party Paper** document package templates come in.

For **Third Party Paper** document package templates, we are relegated to only setting up a template with **Rules & Conditions** as well as **Electronic Approval Groups** and **Electronic Signature Groups**.

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After a **Third-Party Paper** document package template is generated onto a record (for example a Contract Record), files and attachments can be uploaded to the generated document package. This is when users add in the documents and files provided by your vendor, customer, supplier, provider, etc. Once the necessary documents and files have been uploaded, the processing of approvals and/or signatures can continue on as they normally would within a **Standard** generated document package. The menu links are only a subset of items as compared to the menu for **Standard** document package templates. Since we are only setting up conditions, approval groups and signature groups in our **Third-Party Paper** document package templates, this means that all of our "content" for these document packages will be provided after the template is generated onto our record.

Note: Any type of file can be uploaded and used from your third party be it word, excel, pdf, etc.

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Note: The processing of approvals and signatures can also include contacts from your third-party provided they are assigned to the record you generated the template from.

Each Template can have an unlimited number of sections added to it.

Note: Each section has a limit of 8000 characters.

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Mergeable Content & Attachments

Mergeable Content & Attachments

Content Setup: Mergeable Content & Attachments

The next step is looking at mergeable content. This is where users can copy the placeholders and put them into the template.



Document Template: Mergeable Content Overview

Overview Information

Template ID:	**45**
Title:	**_Training_Collaborative_Sales Agreement**
Description:	
Template Area:	**Contracts & Committals**
Template Table:	**Contract Details**
Template Type:	**Document Package**
Is Active Template:	**True**

Mergeable Fields

Field Name	Merge Placeholder
Company Name	{---Company Name---}
Contract Type	{---Contract Type---}
Primary Contact Name	{---Primary Contact Name---}
State/Province	{---State/Province---}
Vendor / Client Name	{---Vendor / Client Name---}

Clause Library References

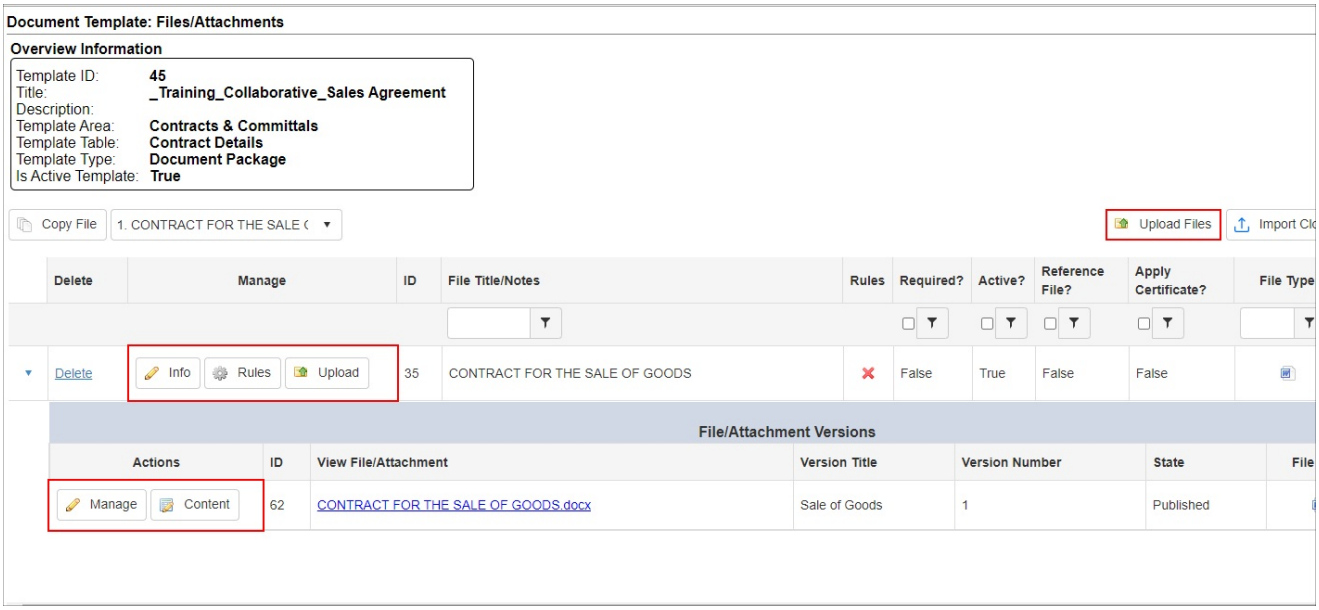
Clause Library Name	Merge Placeholder
Governing Law - DE	{--rcl--Governing Law - DE--rcl--}
Governing Law - MA	{--rcl--Governing Law - MA--rcl--}
Governing Law -NJ	{--rcl--Governing Law -NJ--rcl--}

Note: when pasting templates be sure to past them in the same formatting as the rest of your document. Also, treat the place holders as a word putting a space before and after just like you would normally. Ex -This {---Company Name---} is….

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When finished copying, go to the attachments section.

Attachments

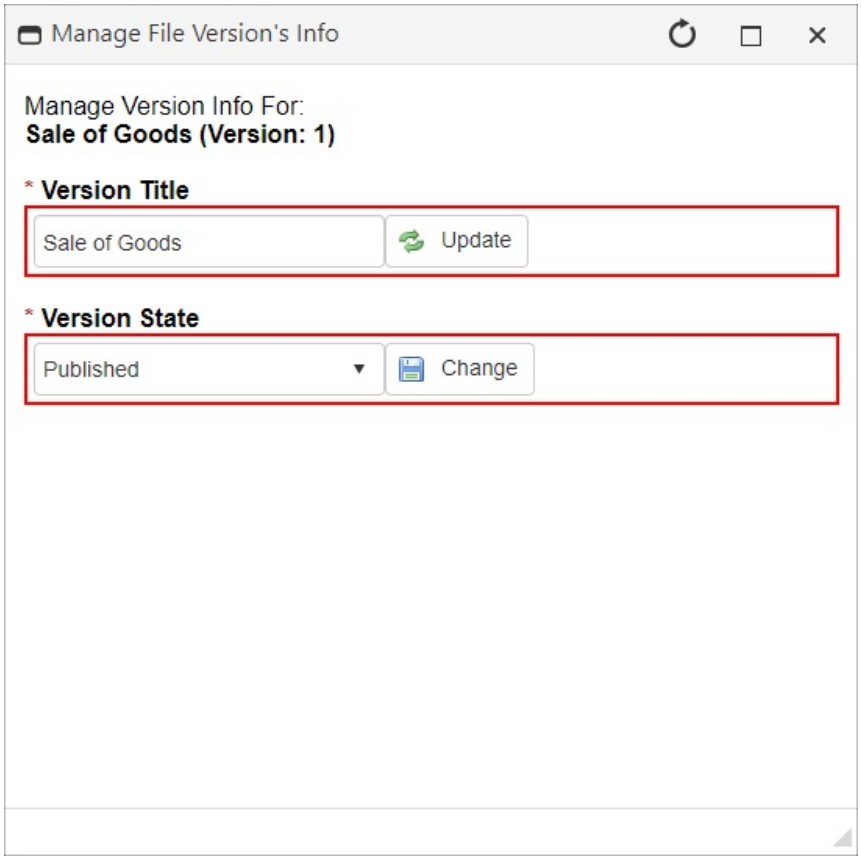


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Load the template in this area. Once, uploaded the file shows in files section of the screen. Admin users can set rules around it and update the info of the file.

Click **Manage** to change certain properties of the document.

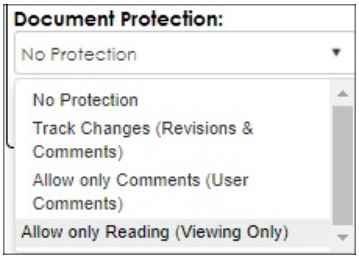


NOTE: if you have the **Doc Authoring Module** this is where, by clicking **Content**, that a user can protect the document with a password as well as set the track change settings for the template as well.

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The options for tracking changes are:



- **Document Protection:**
  - Specify the protection level of the file after it has been merged or generated.

There are four (4) types of protection levels that can be specified.

Document Protection Levels:

1. **Allow Only Comments (User Comments)**
    1. Only comments can be added to the document.
2. **Allow Only Reading (Viewing Only**
    1. All management is disabled.
3. **Track Changes (Revisions & Comments)**
    1. Enables management of document but only with red line track changes.
4. **No Protection**
    1. There is not protection applied to the document.

When using the password and protection level options together, users can setup a document that could force red line track changes for any editing of the document as well as password protecting the document so that track changes cannot be disabled.

Select the option and click **Save**.

Once this has been saved, a user can Generate Documents.

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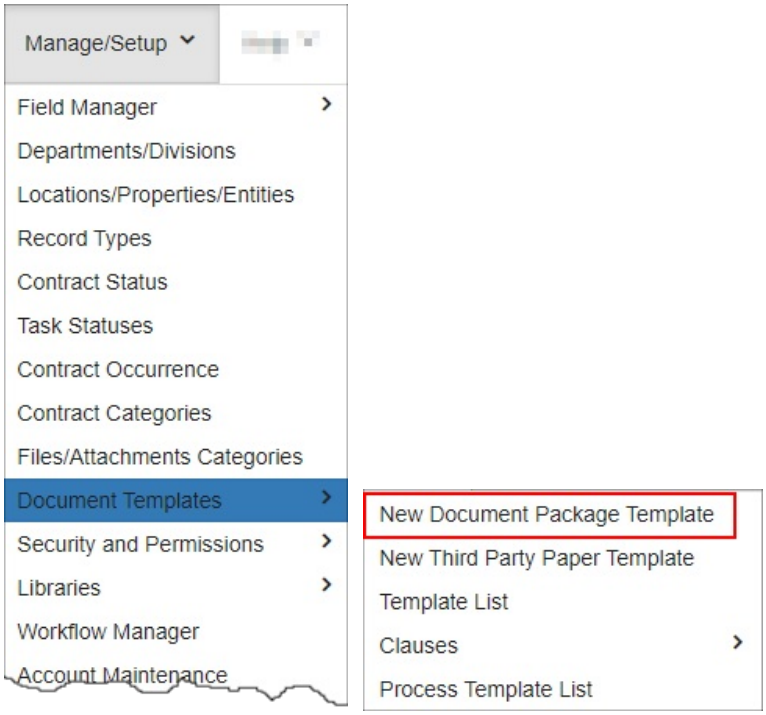
Template Overview

Template Overview

Manage Document Package Templates: Adding a New Template

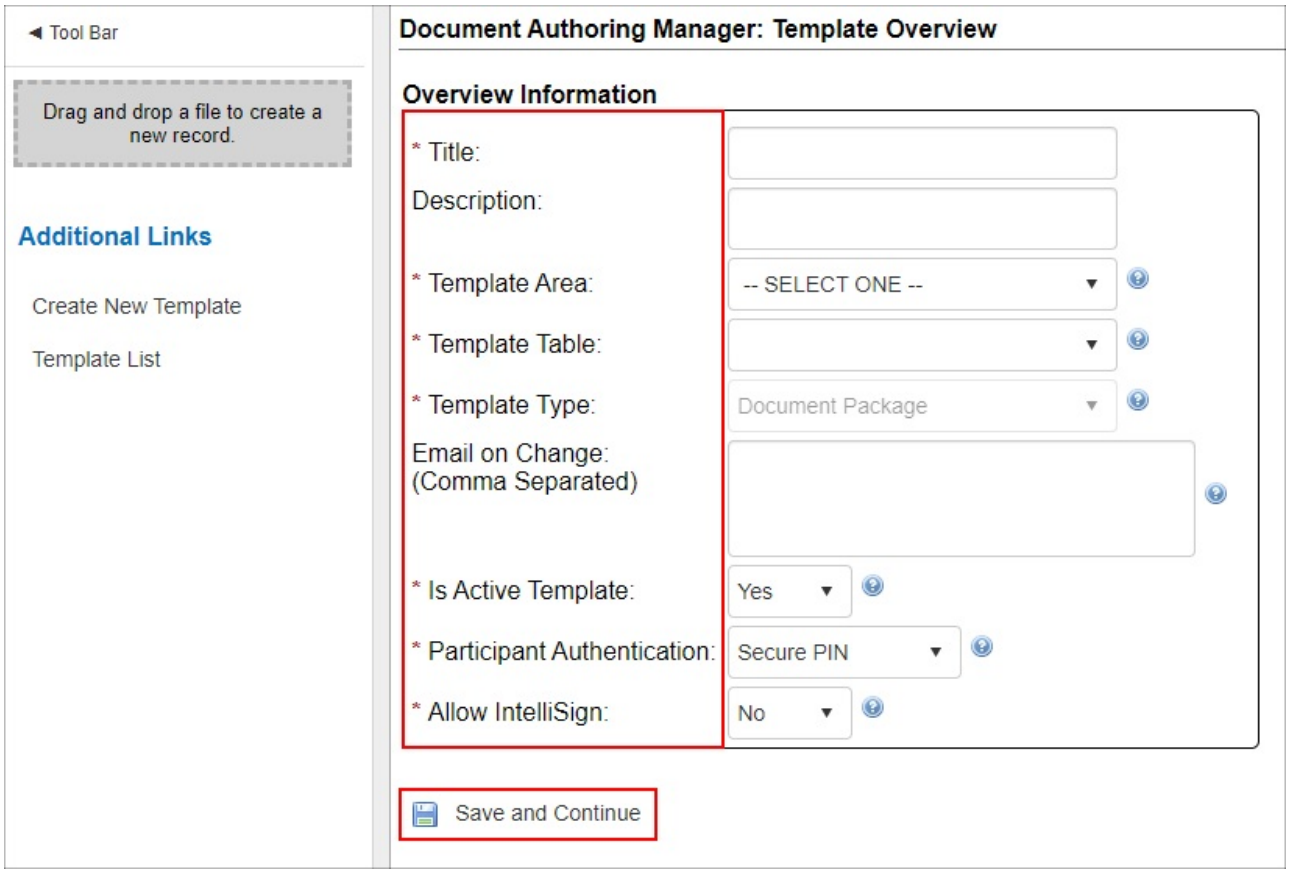
Note: Only authorized or licensed users may have access to this functionality.

1. To begin the Document Template Process, navigate to **Manage/Setup** > **Document Templates** > **New Document Package Template**.

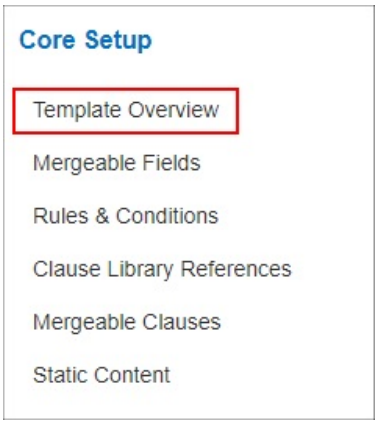


The **Document Authoring Manager Template Overview** screen displays.

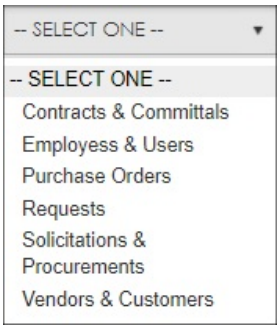
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1. **Title:** Create a friendly name for the template
2. **Description:** Create a brief description for the template (Optional)
3. **Template Area:** Select the area of the system you will be using the template for (e.g. Contracts & Committals). The document Authoring module can be used for different areas of the system.



4. **Email on Change:** Input an email address to be emailed if the template is changed. Do not populate this field until initial template creation is complete.
5. **Is Active Template:** Can this template be used right now in the system?
6. **Participant Authentication** (**For Doc Authoring Module**): How will participants sign in to make modifications or sign the document using the eApproval and/or eSignature processes?
7. **Allow IntelliSigning**(**For Doc Authoring Module**): Can IntelliSign be used for this template?

Click **Save and Continue** to open the **Mergeable Fields** screen.

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Select Mergeable Fields

Select Mergeable Fields

Manage Document Package Template: Selecting Mergeable Fields

Note: Only authorized or licensed users may have access to this functionality.

After completing the overview, the **Mergeable Fields** page displays. Mergeable fields can be selected from all associated tables & fields (based on the template's area). As fields are selected, the names of the fields are shown with a boxed area containing the description of the field (if any) as well as a line to provide a **Display Name** for each field. The display name is used specifically for this document package template and is part of the placeholder that is used for the mergeable field.



The list also shows if any of these fields are used within any of the areas for rules and conditions within the template. These areas are:

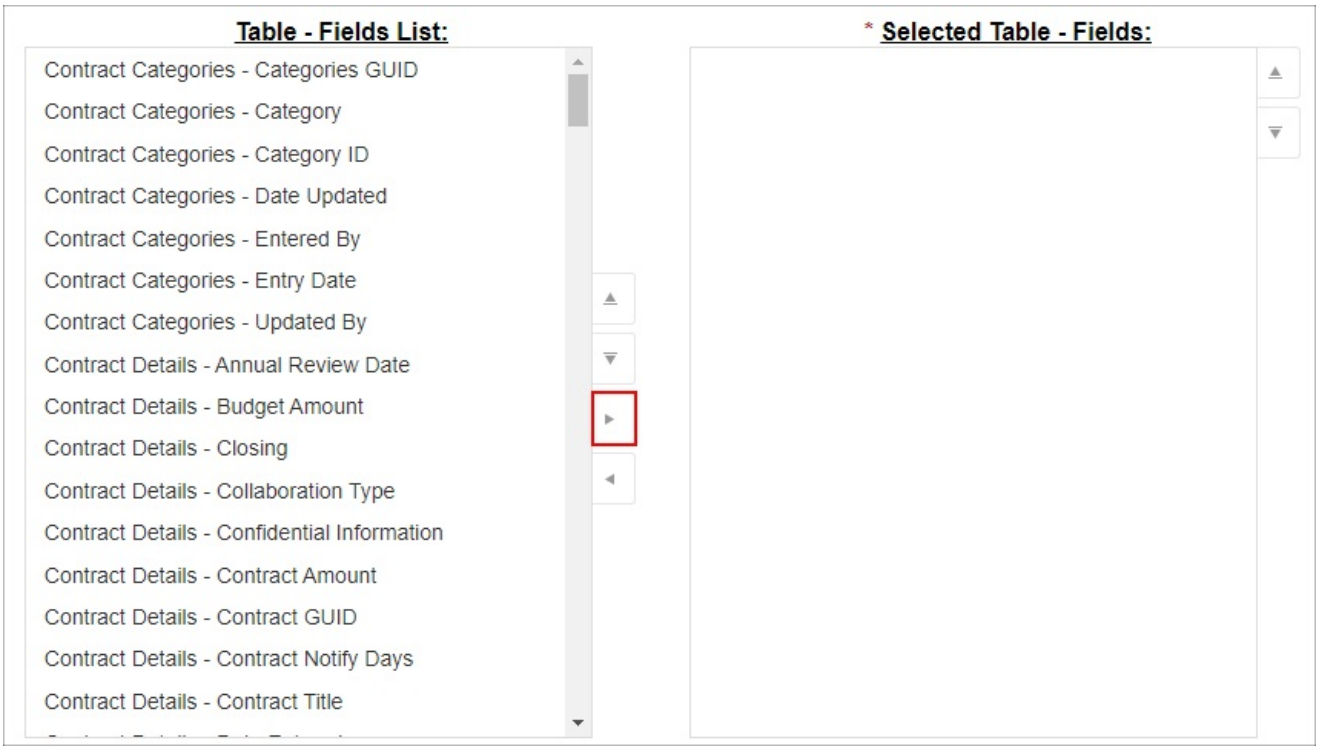
- **Template Availability conditions**
  - Set on the **Rules & Conditions** page.
- **Approval and/or Signature Group conditions**
  - Set within the two areas for **Approvals & Signatures**
- **Attached Files**
  - Set by clicking **Attachments**.
- **Mergeable Clauses**
  - Set by clicking **Mergeable Clauses**.

To Add a Field to the Selected Table-Fields right-hand list

1. Click/Highlight the field to add from the **Table-Fields List** left-hand box. Select multiple fields by using CTRL+Click.

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2. Next, click the **right arrow** to add the selected field(s) to the **Selected Table-Fields** box or drag-and-drop the field(s) to the box.



To Remove a Field from the Select Table-Fields list

1. Click/Highlight the field you would like to remove. Select multiple fields by using CTRL+Click.

2. Click the **left arrow** to remove the selected field(s) from the **Selected Table-Fields** box or drag the fields from the right column to the left column

Note: If a field is merged into a template, it will not be removable from the "Selected Table-Fields" box. Also, if you plan to have certain rules and conditions around this template (i.e. – This template can only for a certain Contract Type but you will not need the Contract Type merged) you will still need to drag that field over to make an available mergeable field.

Once finished selecting the Mergeable fields, click **Save Mergeable Fields**. If fields are successfully saved, the following text will be shown:



To start the creating of the new document template, click **Create New Template** on the side menu.

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Rules & Conditions

Rules & Conditions

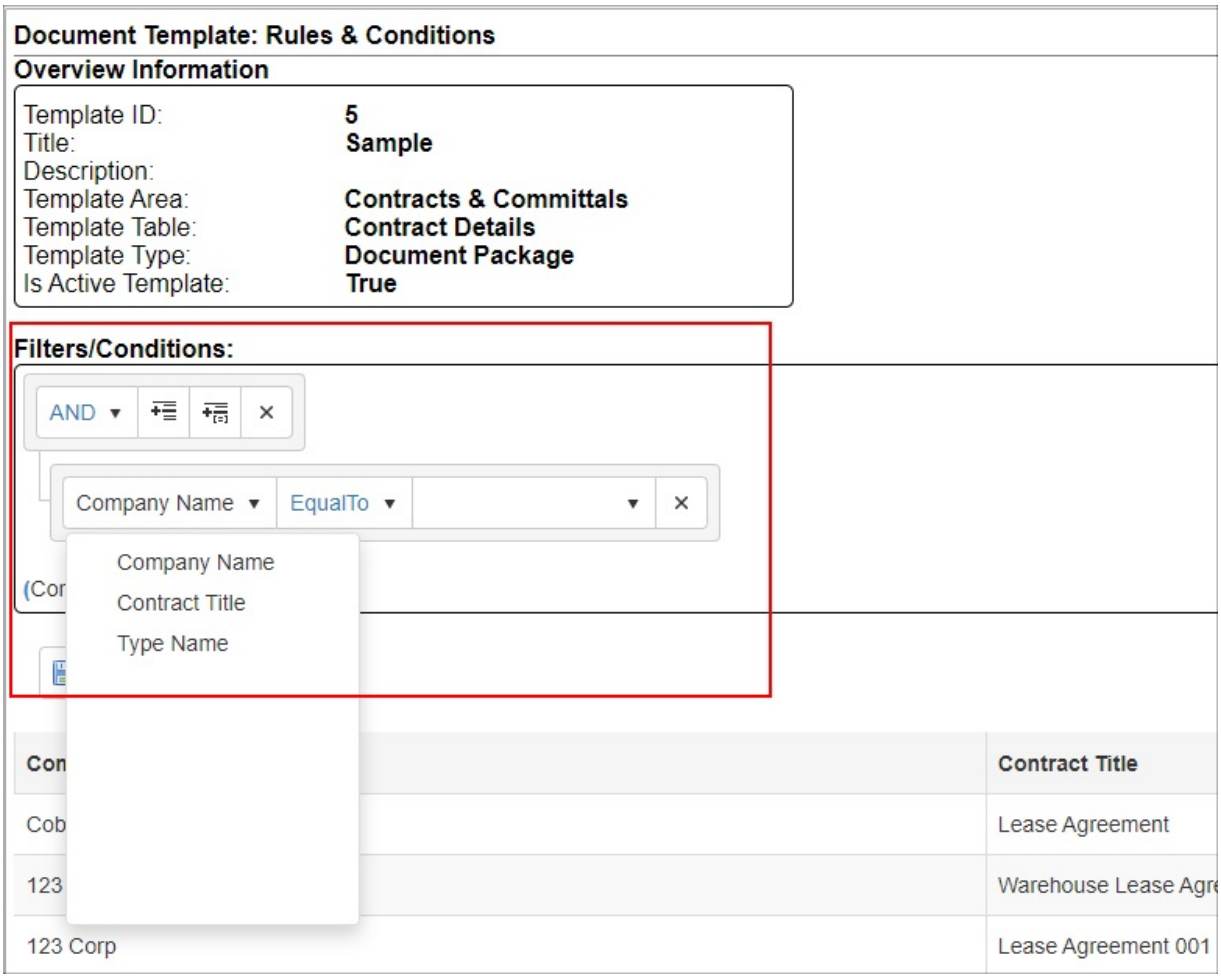
Manage Document Package Template: Rules & Conditions

Next, the **Rules and Conditions** page displays on which rules and conditions around the template are established. The filters/conditions determine when the template is available to the end user.

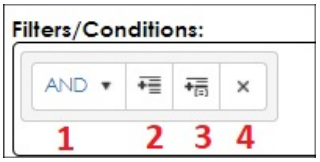
Note: In the **Mergeable Fields** section, ensure selection of any fields needed to enable these rules and conditions has occurred.



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To better understand how to use the filters/conditions functionality, lets breakdown the components. In the picture below each of the components of the filtering control are numbered:



Filtering Control

1. **And/Or Selector**: Used to determine if a new expression is being added as an 'AND' or 'OR' condition

2. **Add New Filter Expression**

Adds a new filter expression to the list of conditions (takes into consideration the 'And/Or Selector')

3. **Add Expression Group**

Adds a new sub-grouping of expressions to be used in complex conditions. (takes into consideration the 'And/Or Selector' between groups)

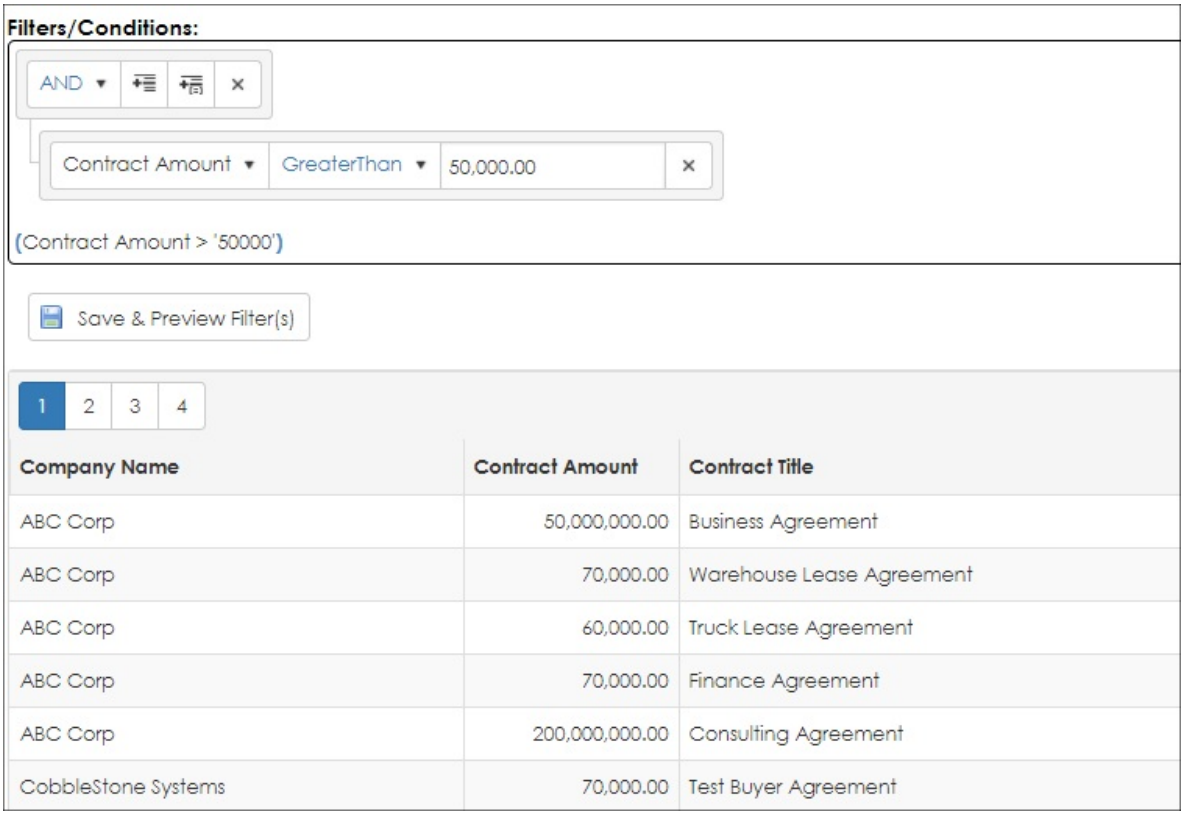
4. **Remove Filter Item**

Removes the filter/condition from the list of applied filters and conditions.

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Saving and Previewing

Once the filters/conditions have been specified, click **Save & Preview Filter(s)**. This will save the filters to the template and bind the results to the grid on the screen for a preview the contract records that meet the filters/conditions. Please note that only authorized users will be able to use templates that match the filters/conditions criteria for each contract record.



If the filters/conditions need to be modified, they can be changed so by changing the filters/conditions defined on the screen and clicking **Save & Preview Filter(s)** again.

Note: If no fields were selected in the previous step and the Rules page is accessed, the application displays a warning.

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Document Template: Rules & Conditions

Mergeable Fields must be set up before Rules can be added for a Mergeable Clause.
To set up mergeable fields, click here.

Overview Information

Template ID:	**23**
Title:	**Chris Testing**
Description:	
Template Area:	**Contracts & Committals**
Template Table:	**Contract Details**
Template Type:	**Document Package**
Is Active Template:	**False**

Filters/Conditions:

Save & Preview Filter(s)

Page Size: 25 Set

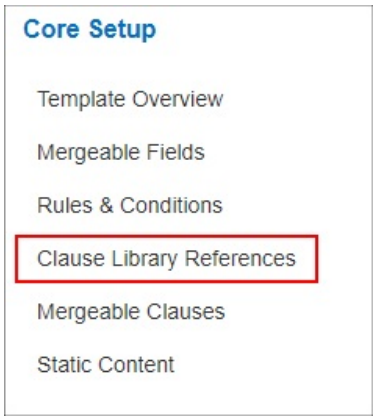
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Referenced Clauses

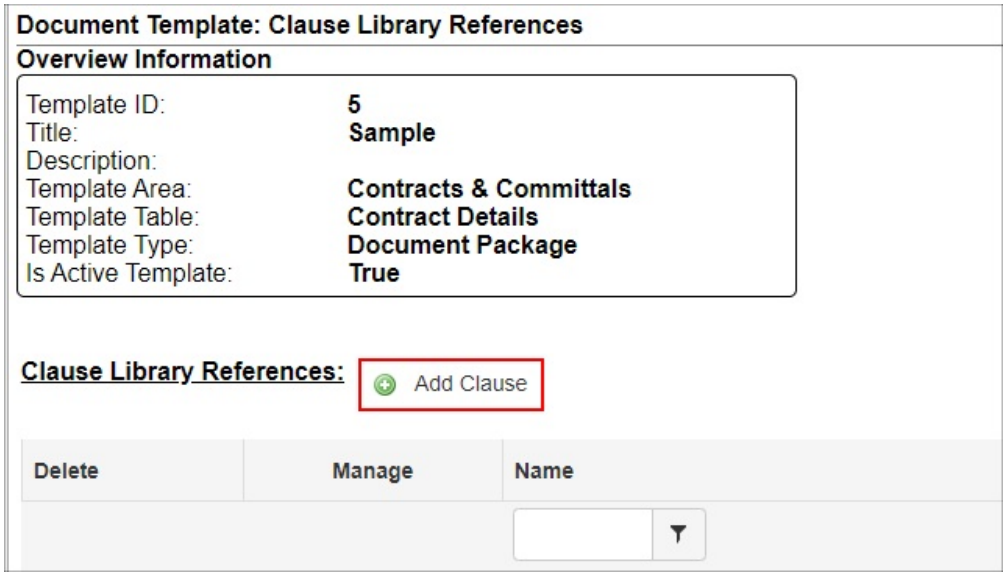
Referenced Clauses

Manage Document Package Templates: Referenced Clauses

Templates allow users to use place holders based on the **Clause Library** in the system.

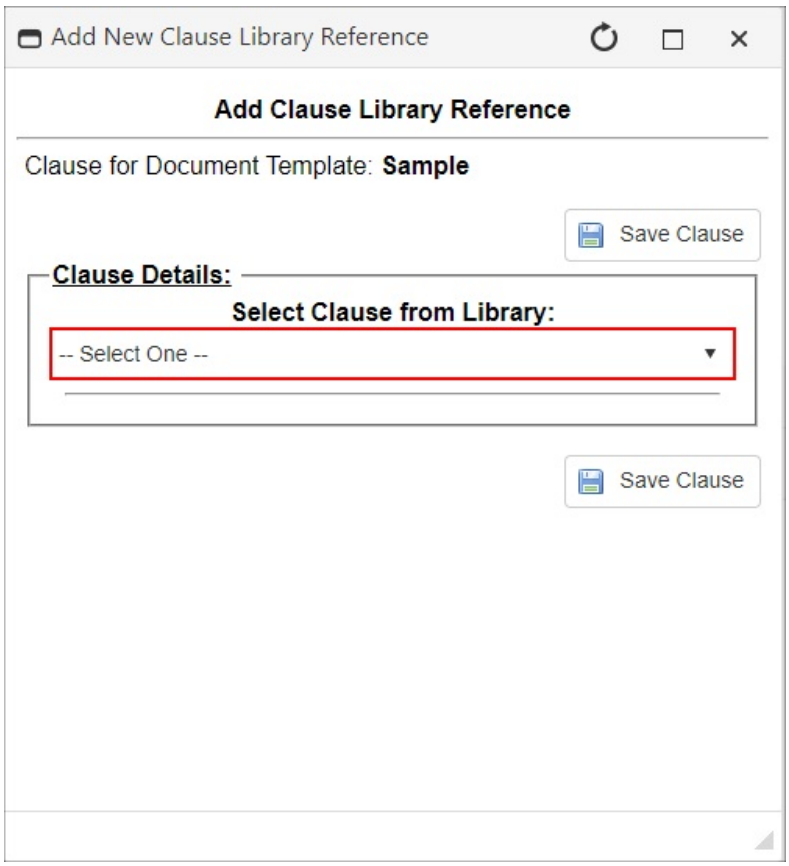


Click **Add Clause** to pull the clause(s) to be merged into your document.



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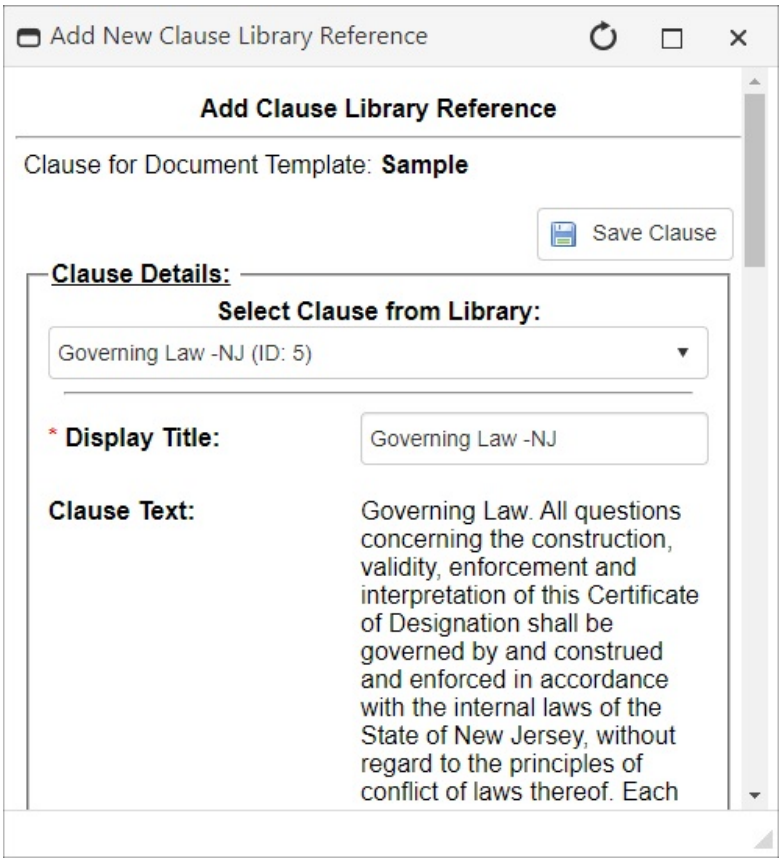
A pop-up window displays.



The drop-down box displays all clauses stored in the Clause Library (access the clause library from the **Manage/Setup** menu).

After selecting the clause, the clause text and clause name appear. If desired, rename the clause for the specified template by editing the **Display Title** information.

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Click **Save Clause** to add the new referenced clause to the template. After saving the Clause, set rules around use of the clause by clicking **Rules**.

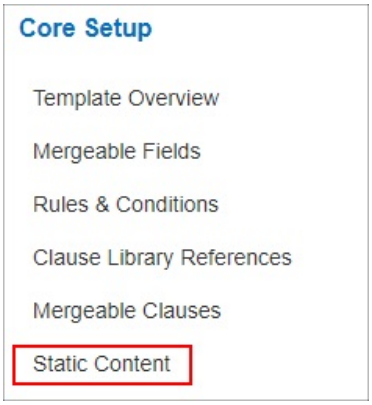
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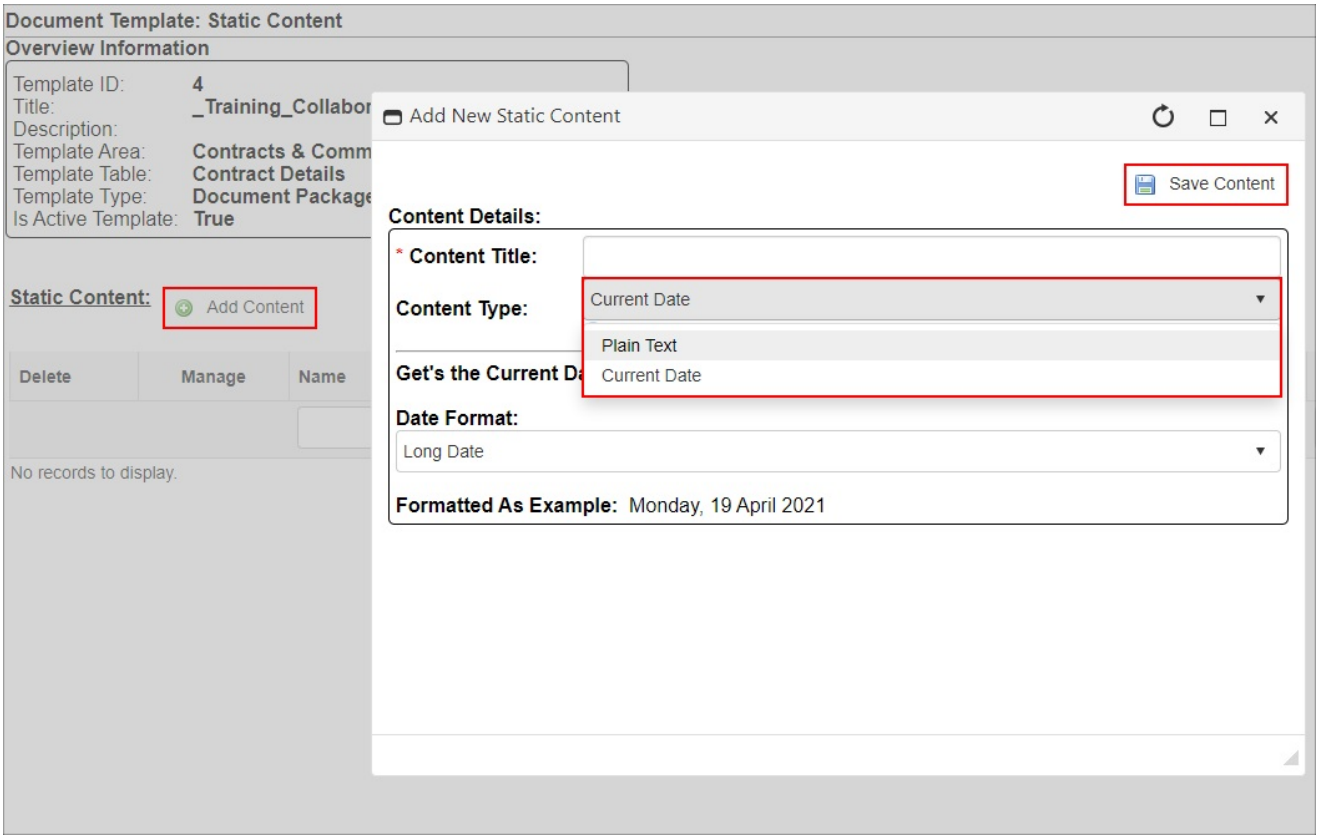
Static Content

Static Content

Manage Document Package Template: Static Content

While building a template, users have the option to select static content for the document.





Admin users can create text (i.e. – Confidentiality message for a header or footer) or a place holder for the current date. Once the content has been selected/entered, click **Save Content**.

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Static Content Types

There are two types of Static Content:

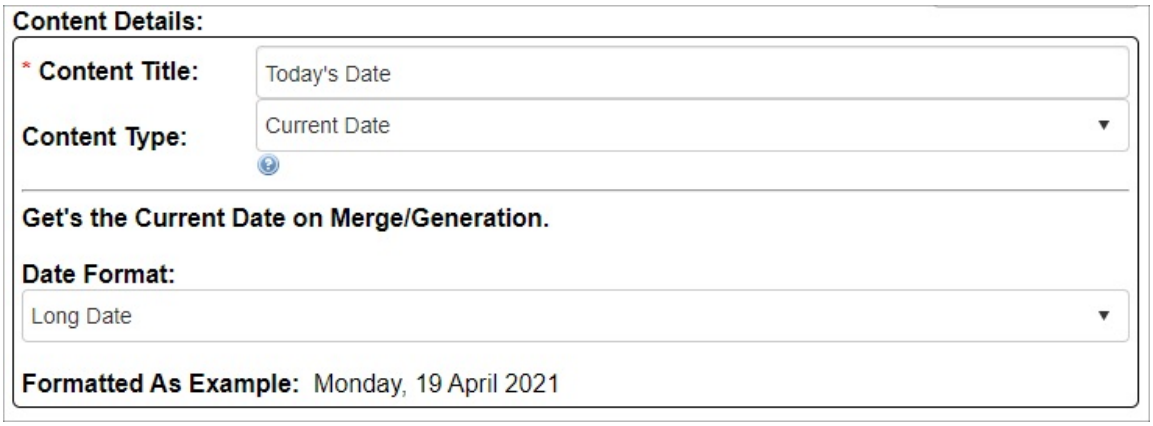
Plain Text

Plain Text is mergable text with no formatting or placeholders. It can be merged onto pdf, pdf additional sections, doc, docx, xls, xlsx and CobbleStone Document Builder Sections files (cdbs).



Current Date

Current Date merges [today's date] onto the file at the time of generation. It is mergeable onto pdf, pdf additional sections, doc, docx, xls, xlsx and CobbleStone Document Builder Sections files (cdbs).

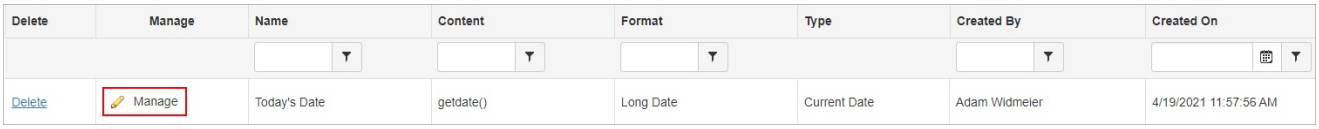


Current Date Formats:

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- Long Date
    - Sunday, 20 August 2017
- Long Date & Time
    - Sunday, 20 August 2017 09:17 PM
- Month Day, Year
    - August 20, 2017
- Month/Day/Year
    - 8/20/2017
- Month/Day/Year with Time
    - 8/20/2017 09:19 PM
- Year/Month/Day
    - 2017/08/20
- Year/Month/Day with Time
    - 2017/08/20 09:21 PM

Click **Save Content** to add the new Static Content to the template and generate a placeholder for it.



After saving the Static Content, manage/edit the content by clicking **Manage**.

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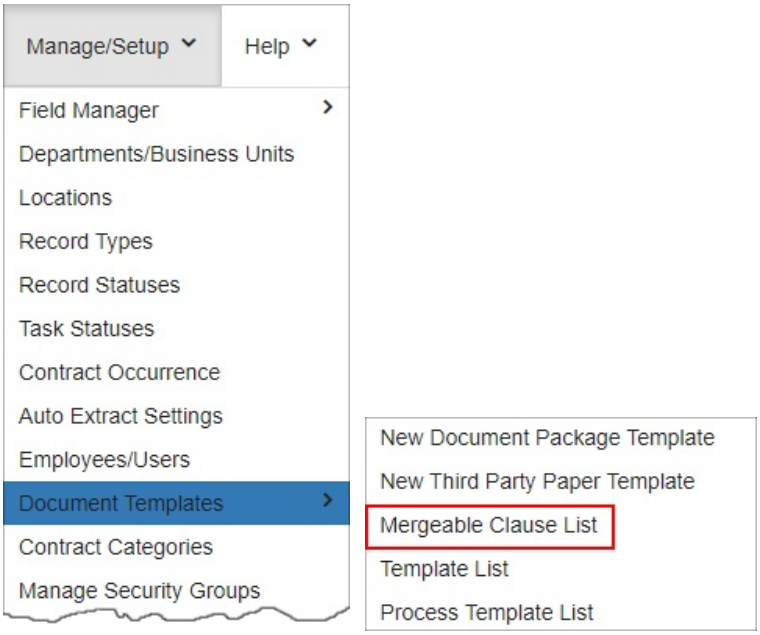
Mergeable Clause List

Mergeable Clause List

Content Setup: Mergeable Clause List

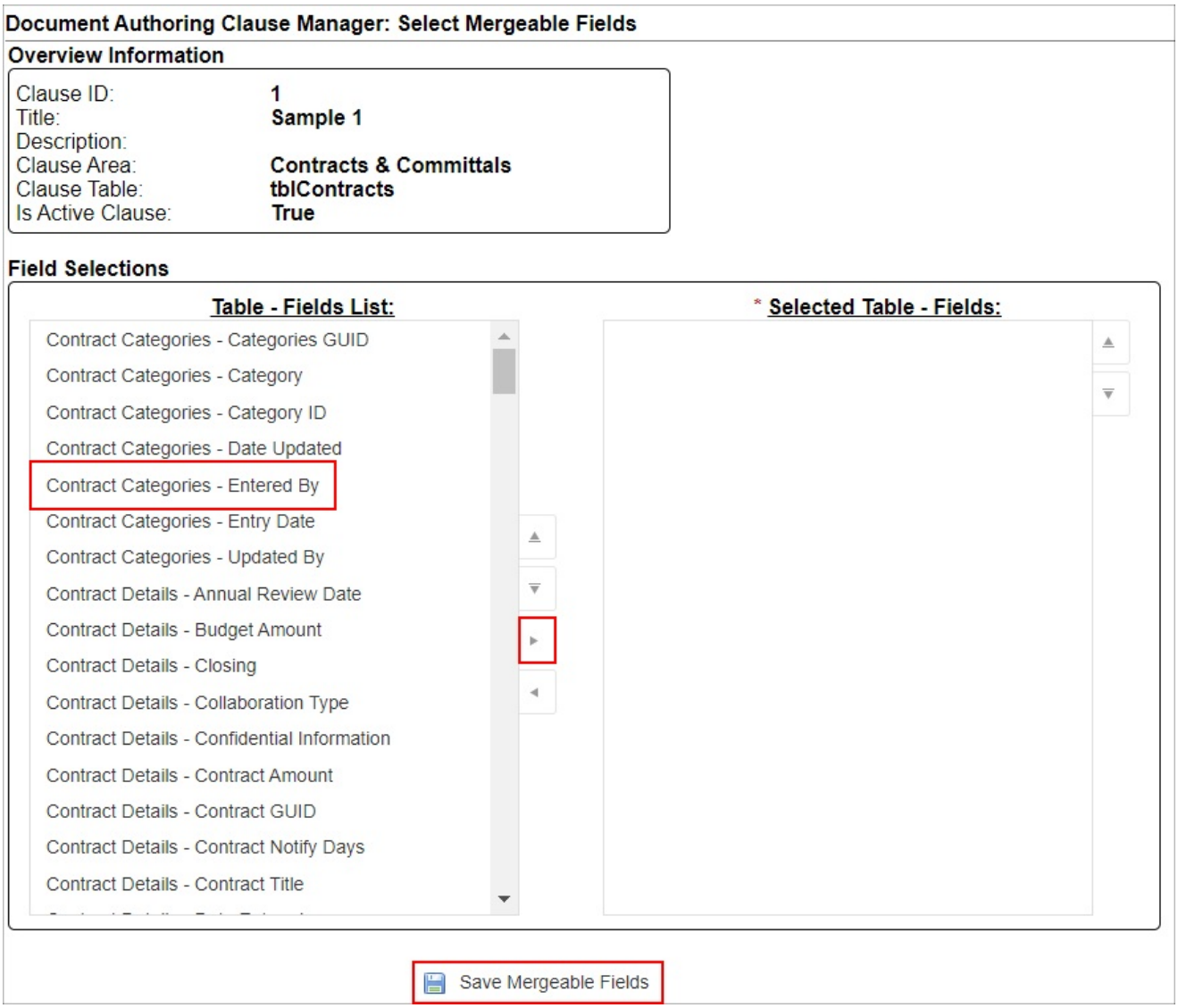
Add New Mergeable Clause

1. Open the Mergeable Clause List



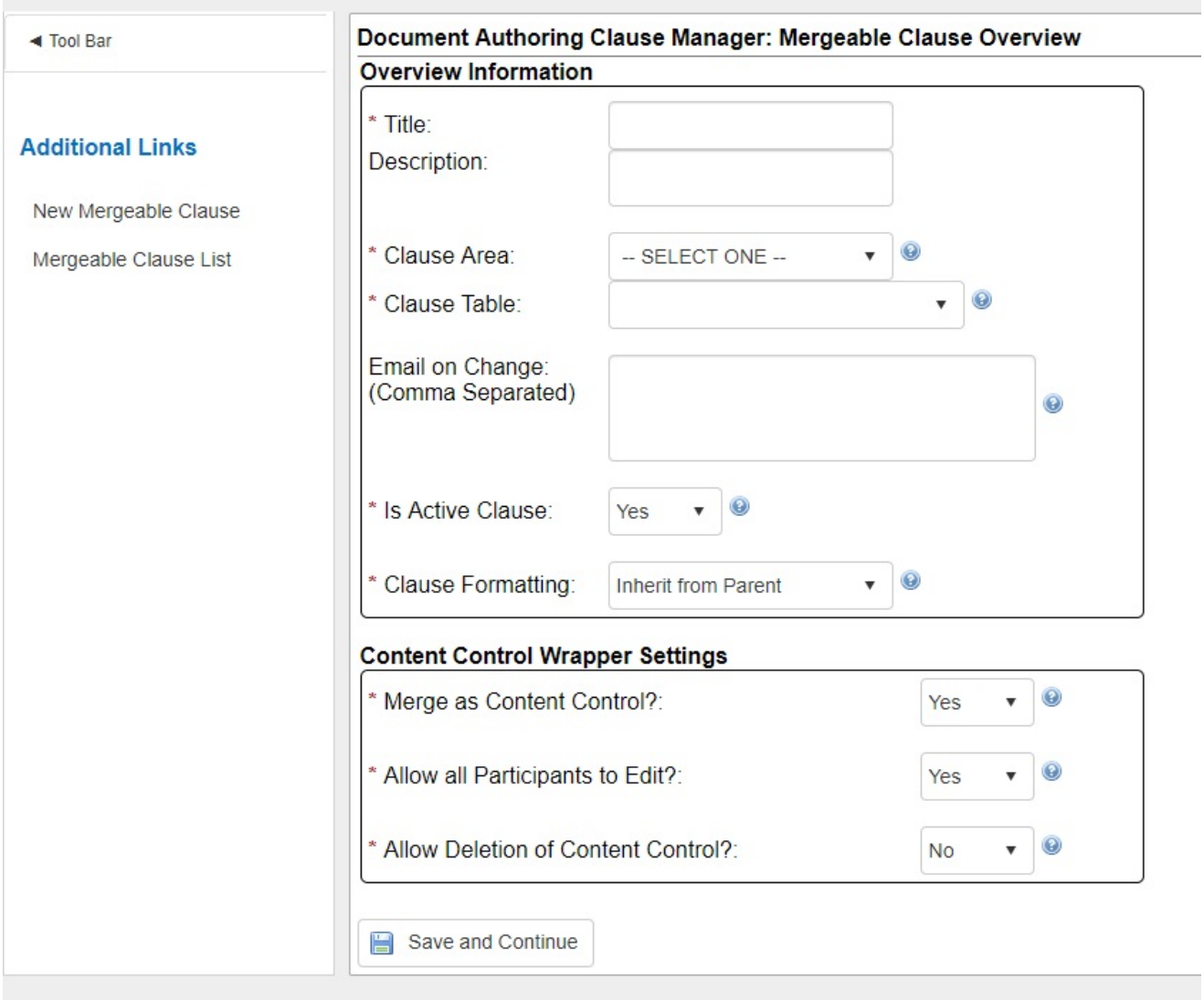
2. Select **New Mergeable Clause** in the side menu

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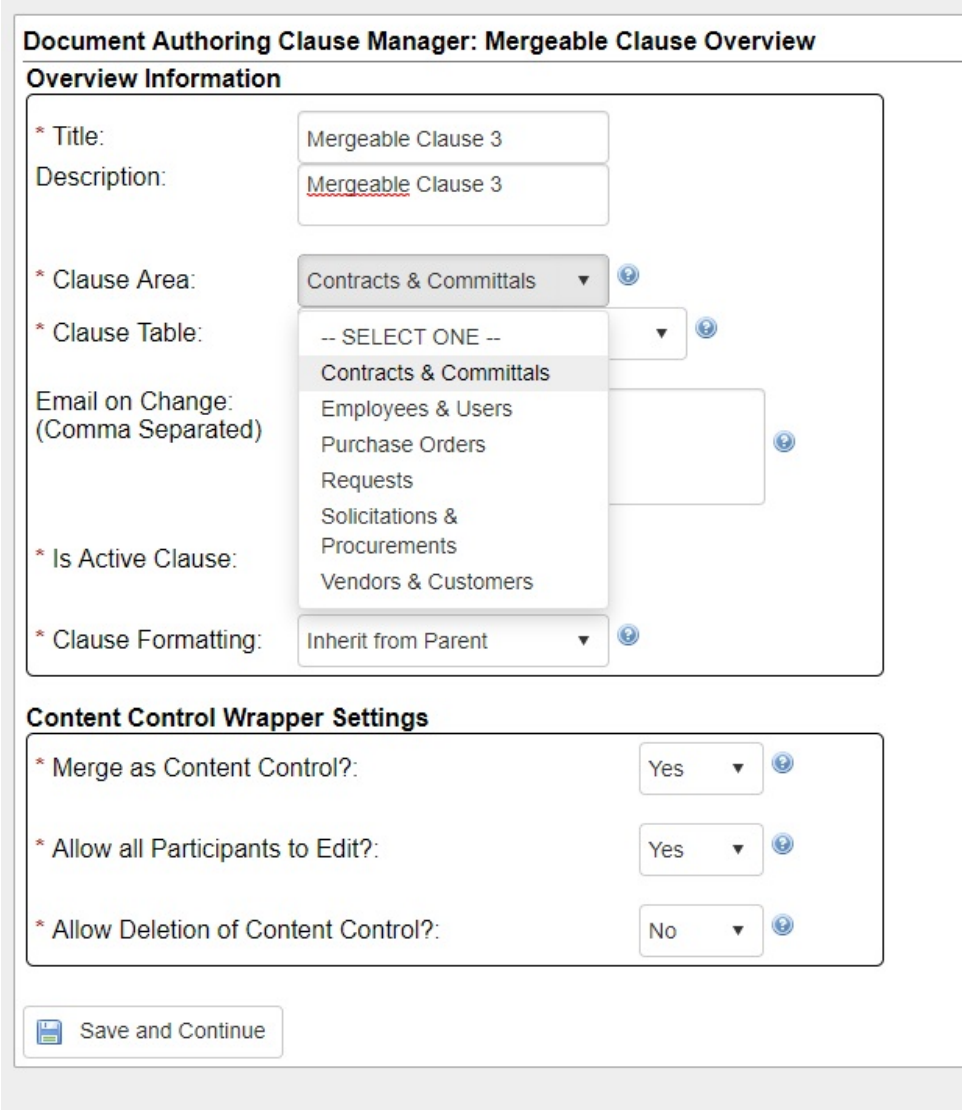
3. Give the new mergeable clause a **Title** (Required) and a **Description** (Optional)

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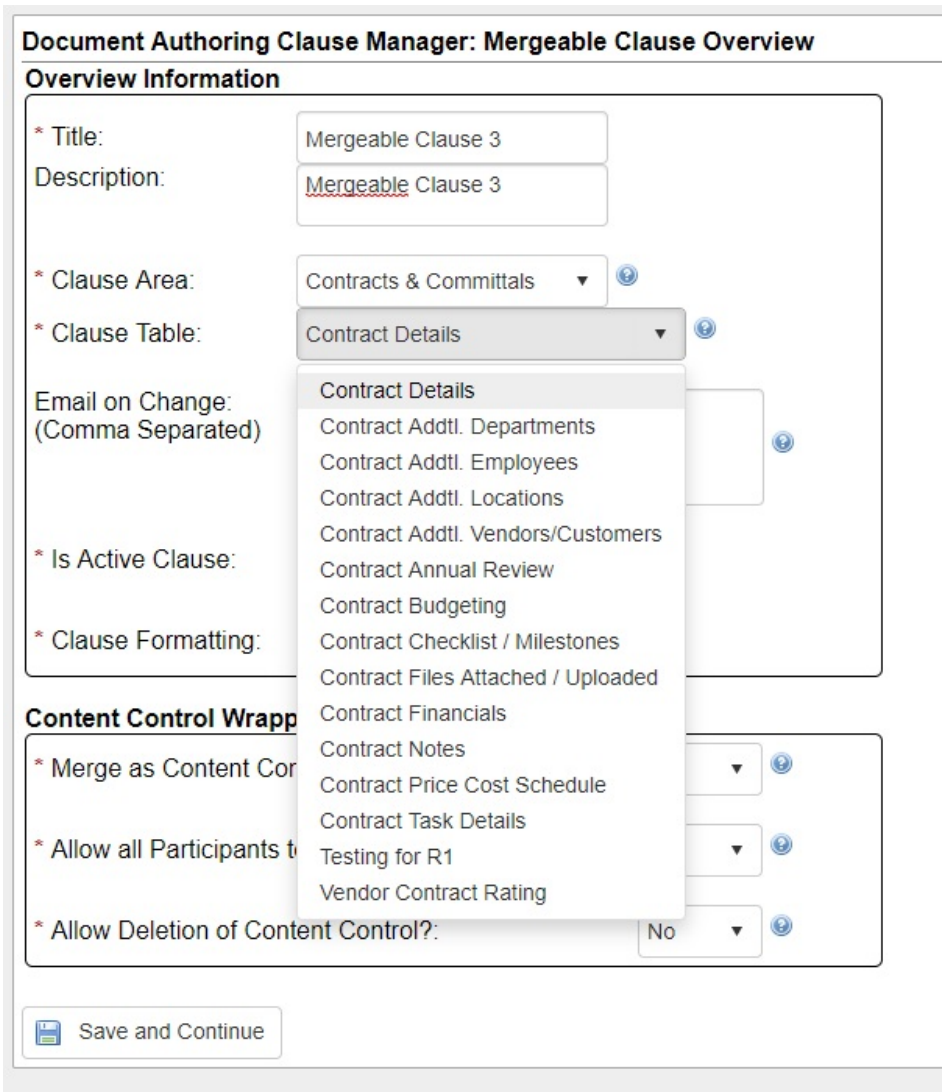
4. Choose a **Clause Area** from the drop down list.

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5. Choose the **Clause Table** from the drop down (populated based on the selected Clause Area).

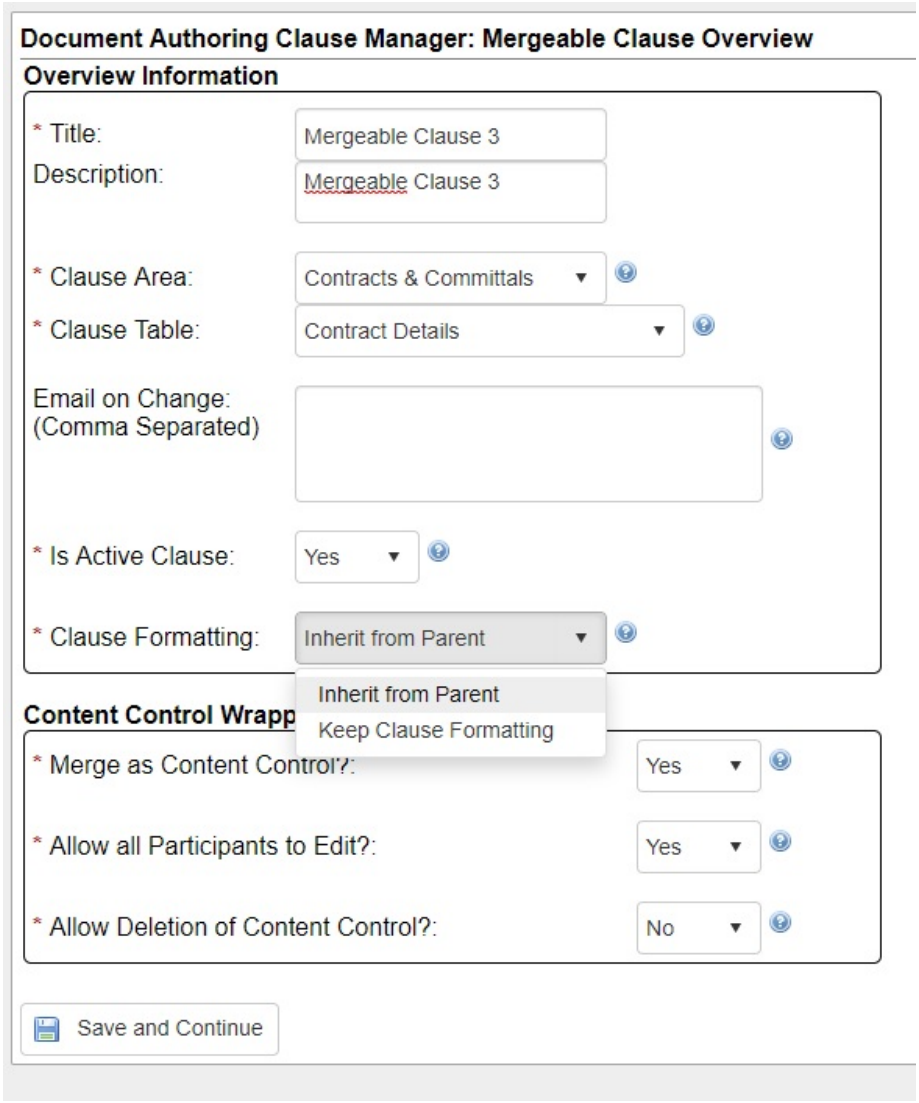
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6. Select whether the clause is active

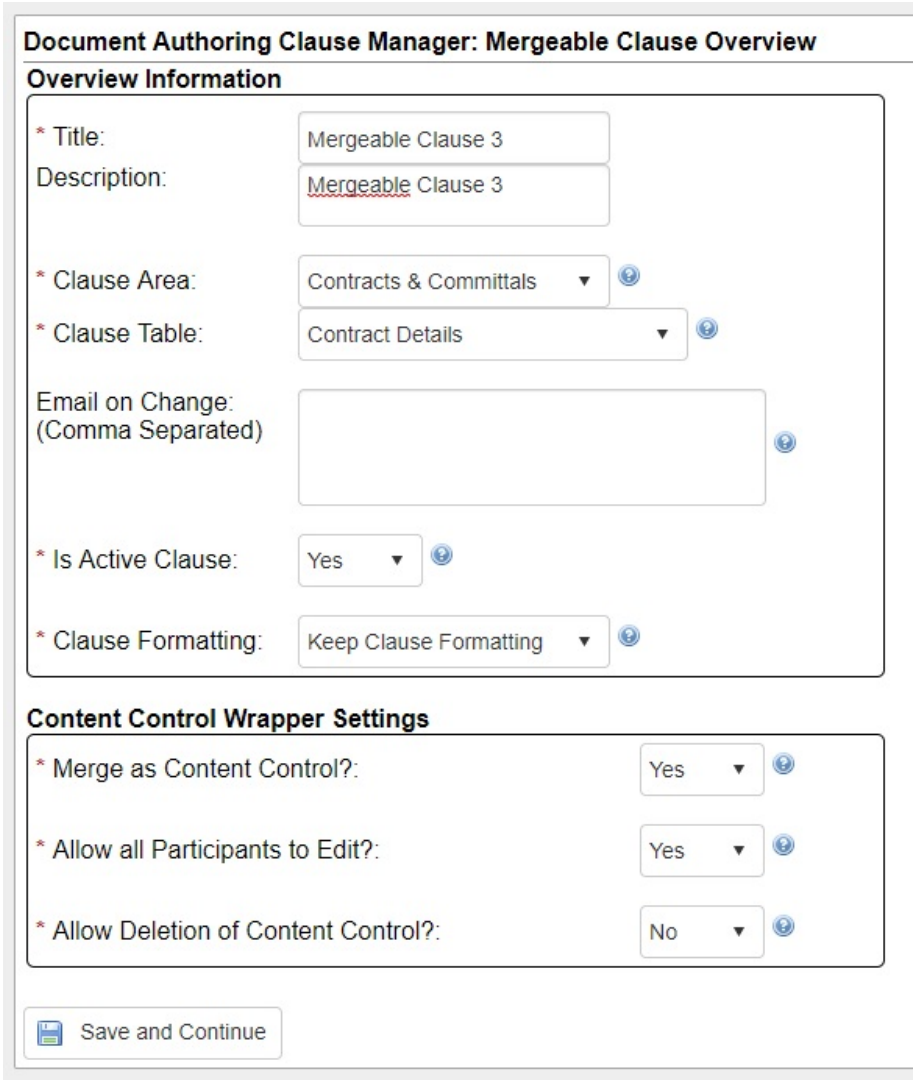
7. Choose the Clause Formatting. When the clause is merged, it can either inherit the formatting from the parent or can keep it's original formatting.

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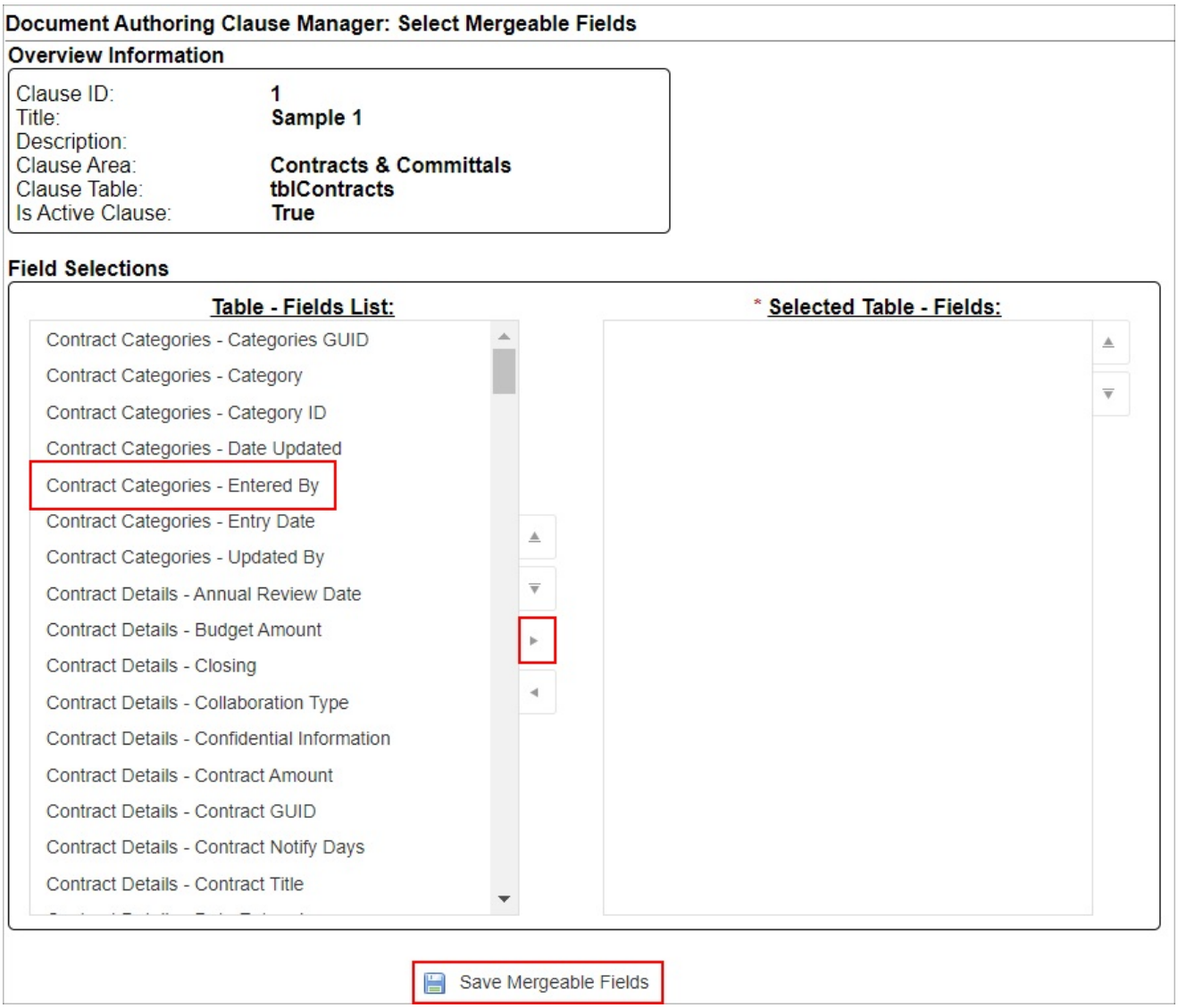
8. Complete the **Content Control** selections then click on **Save and Continue**.

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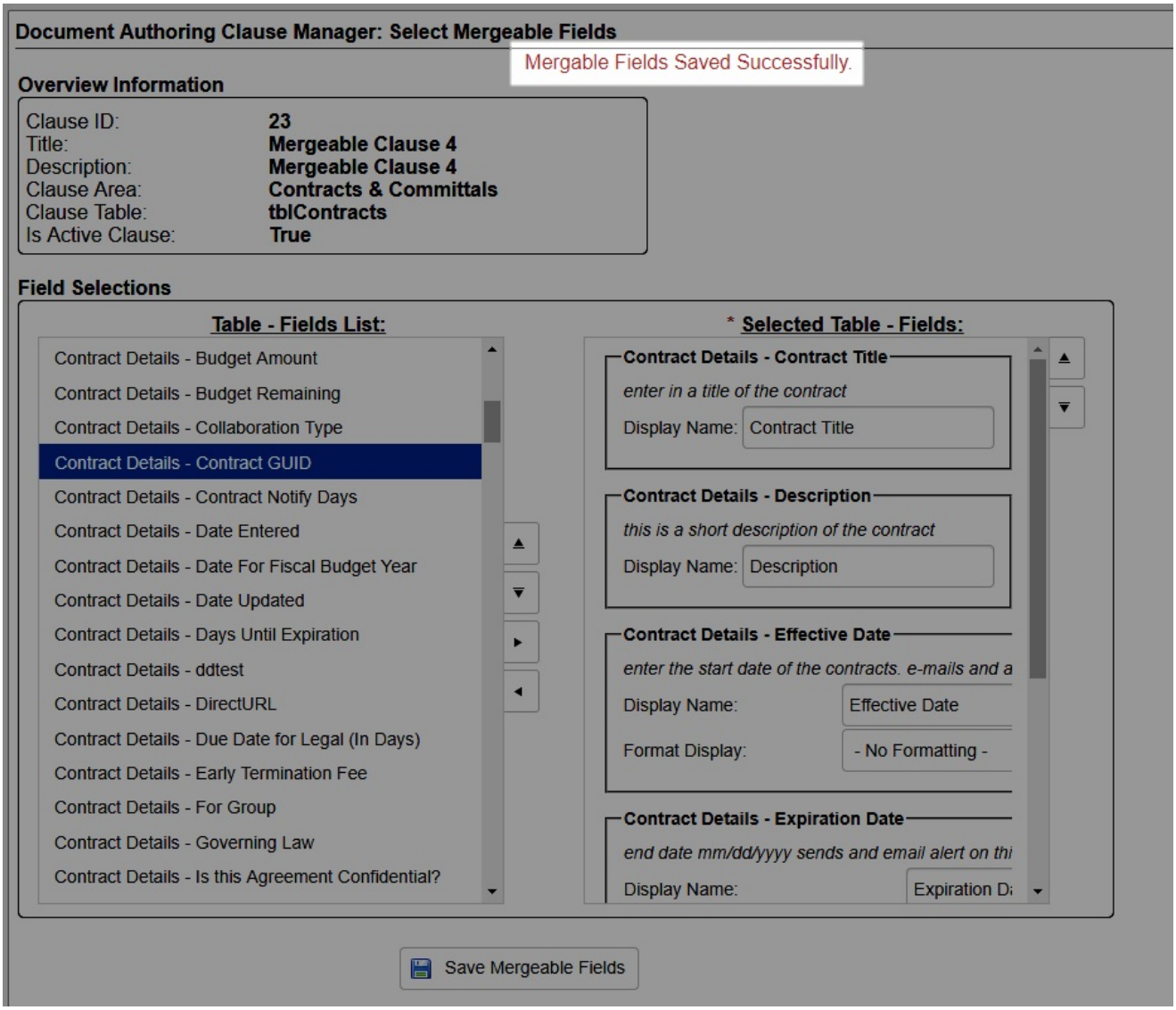
9. After clicking **Save and Continue**, the Select Mergeable Fields window will open. Select the mergeable from the **Table - Fields List** column on the left then click the right arrow to move it to the **Selected Table - Fields** column. Repeat as necessary until all of the fields needed have been moved to the **Selected Table - Fields** column. Click on **Save and Continue**.

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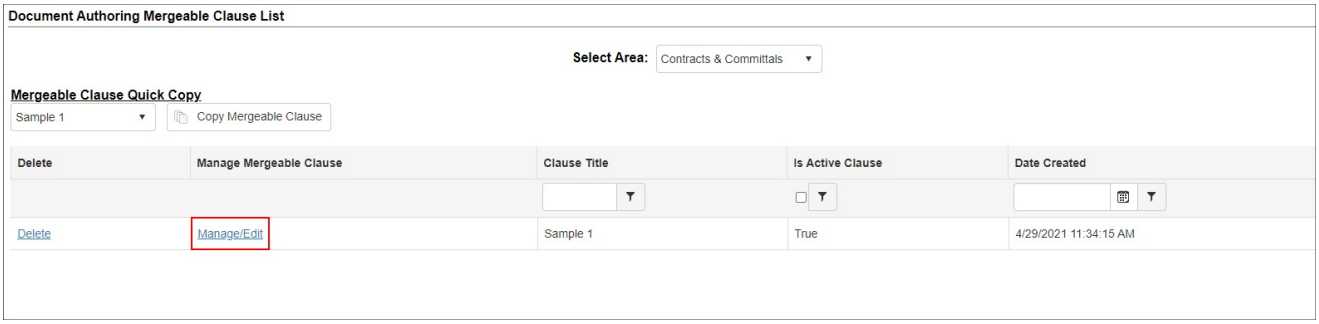
10. A message will show at the top of the screen stating the Mergeable Fields were successfully saved.

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Manage a Mergeable Clause

1. To manage a mergeable clause, click the Manage/Edit link next to the Clause to be edited.

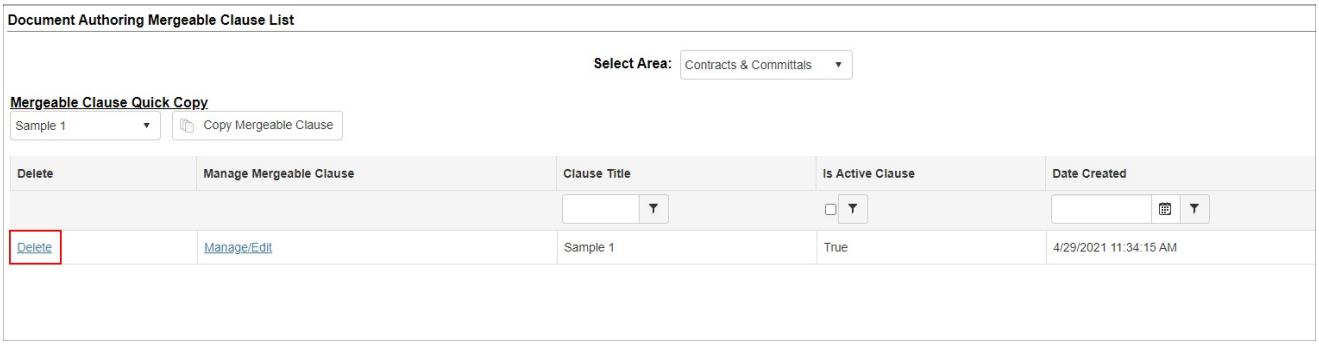


2. Make the necessary changes and click **Save and Continue** to finish.

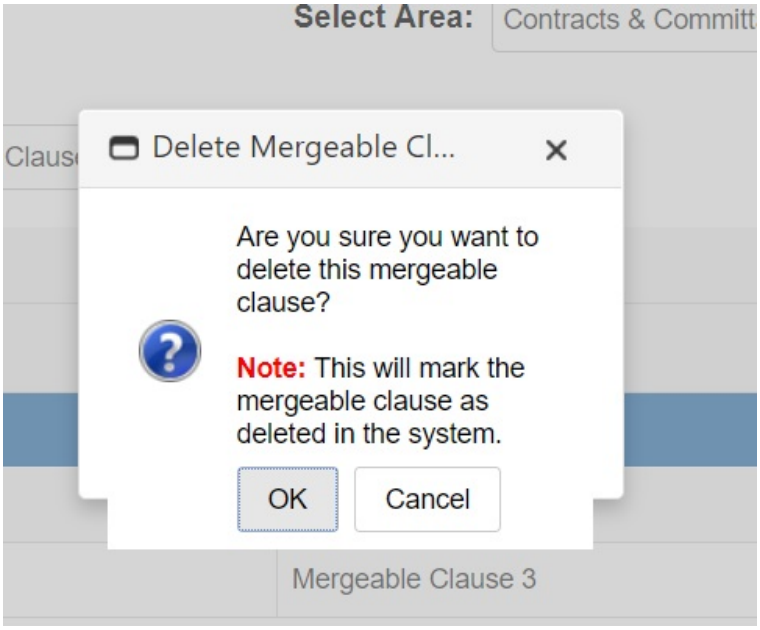
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Delete a Mergeable Clause

1. To delete a mergeable clause, click the **Delete** link next to the Clause you would like to delete.



2. Confirm you would like to delete the mergeable clause.



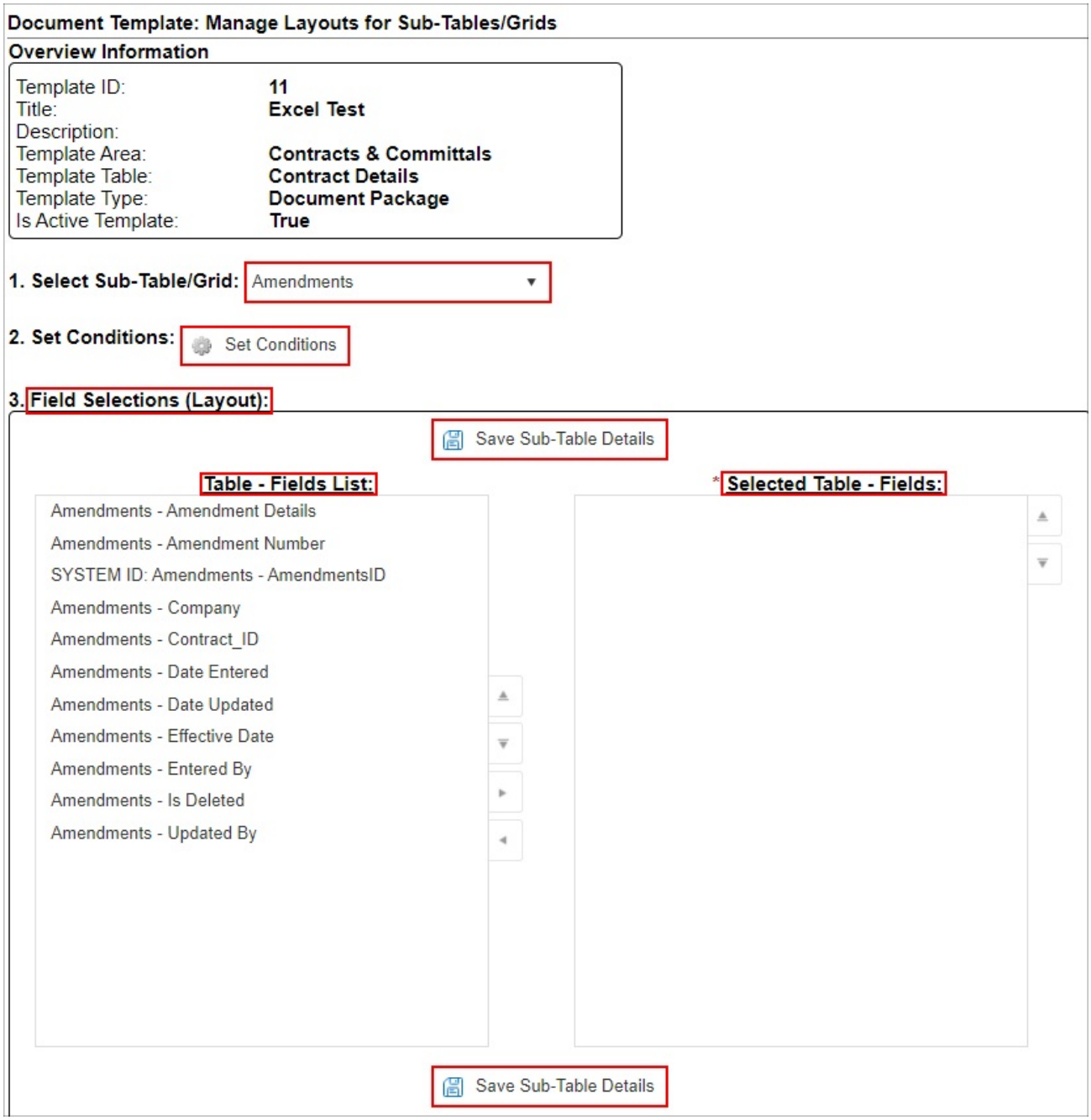
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Mergeable Subtables - Manage Layout

Mergeable Subtables - Manage Layout

Manage Document Package Template: Managing Layout (sub-tables)

The Manage Layout(s) screen allows users to specify the layout of fields for the sub table grid/table to be displayed on the document.



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This screen has three major components:

1. **Drop Down Sub Table Selection**: The drop-down list of Sub-Tables/Grids
2. **Table-Fields List**: The List of all fields associated with the table selected from the drop-down list
3. **Selected Table-Fields**: The list of fields selected to be used on this sub table.

Drop Down Sub Table Selection

This drop-down list populates the two list boxes based on the sub table selected.

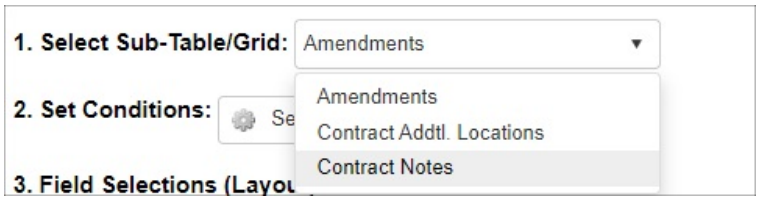
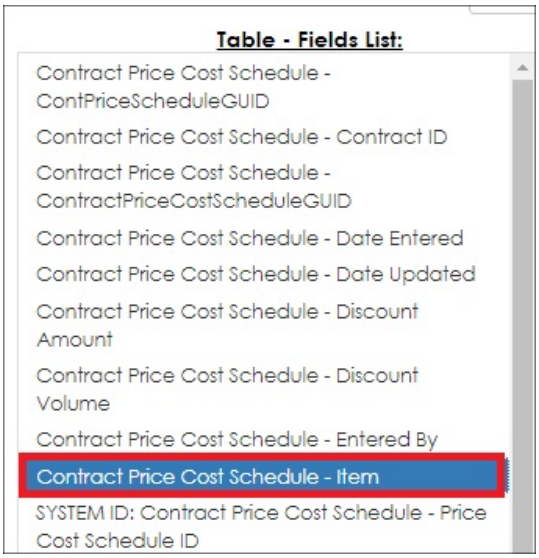


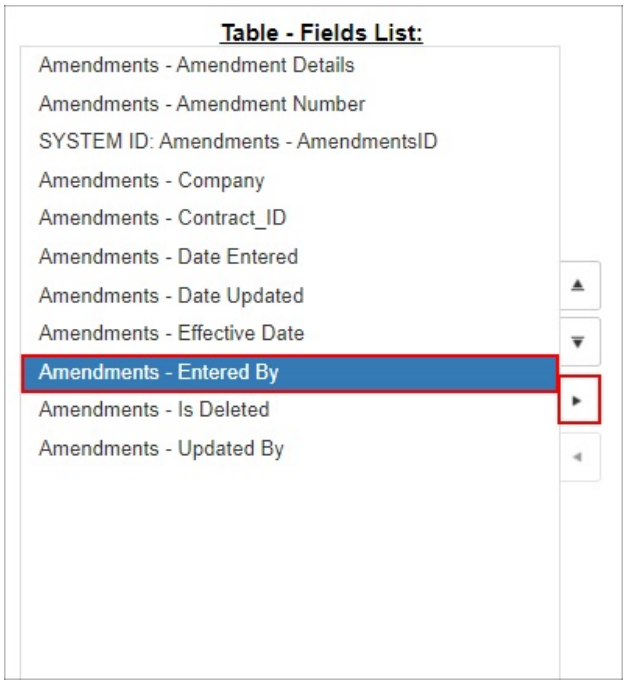
Table-Fields List (Available to be Selected)

This list shows all the remaining fields associated with the sub table selected that can be selected or used.



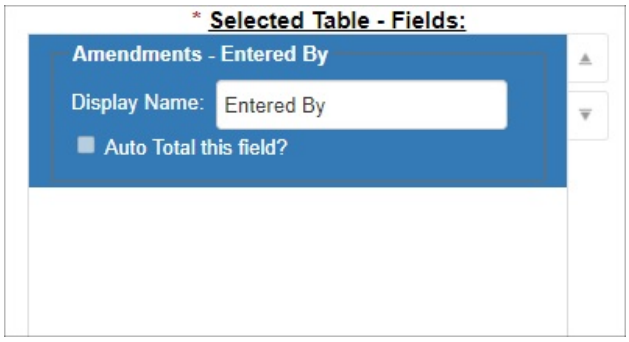
To select a field for use in the template, click the field's name (it will highlight in blue) and either drag it to the **Selected Table-Fields** list or click the **right arrow** (pointing towards the **Selected Table-Fields** list).

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Selected Table-Fields

This list shows the assigned fields for the sub table. To begin managing a field from this list, click the field (it will highlight in blue).



The selected field can now be managed, re-ordered, or removed from the list.

- **Reordering:** To re-order the fields either click and drag the field to the position desired, or click the up and down arrows to the right of the list.

Note: The order of fields from top to bottom corresponds to the layout of the fields (from left to right) in the grid when the content is merged.

- **Removing:** To remove a field once it has been selected, click on the arrow pointing to the left in between the two lists.

Note: This will remove the field from the list of selected and place it back in the list of available fields (the left list).

- **Managing:** Once a field has been selected, it can be managed. Managing a field consists of two components, the Display Name and Auto Totaling.
- **Display Name:** This is the text that will appear at the top of this column in the table when it is merged onto a document.

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Note: This text initially defaults to the **Display Name** of the Field.

- **Auto Totaling:** This check box denotes if the column should be auto totaled and have this total placed at the bottom of this column in the table when it is merged onto a document.

Note: This check box is only available for integer, decimal and currency field types.

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Third Party Paper

Third Party Paper

Manage Document Package Template: Third-Party Paper

Contract Insight's **Document Authoring** Module provides functionality to create manage and process template document packages for files and documents that are created and managed by your organization as well as sent to you by your vendors/customers/providers/suppliers/etc.

Defining the Two Types

The files and documents that are created and managed by your organization are termed **internal** or **standard document package** templates.

The files and documents that are sent or provided to you by your vendors, customers, providers, suppliers, etc. are termed **Third Party Paper** document package templates.

The major difference within Document Authoring between **Standard** and **Third-Party Paper** document package templates has to do with the setting up and management of attachments/files on the template.

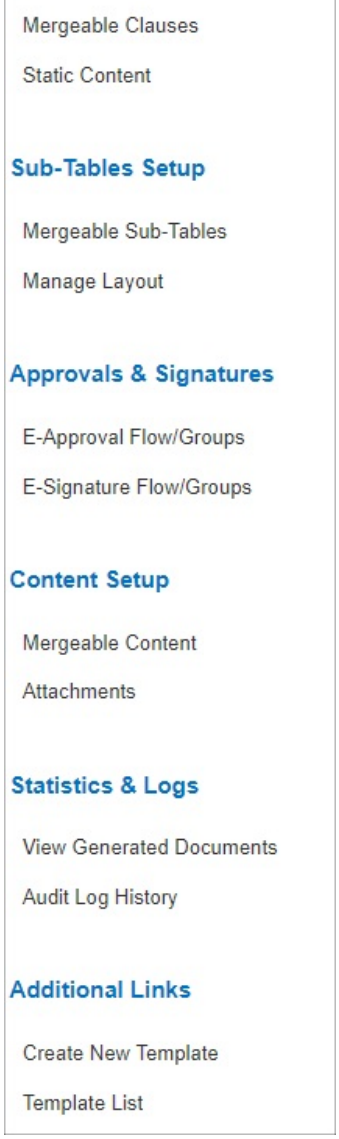
Explaining the Difference

For **Standard** document package templates, users are creating and managing the documents so they can provide the documents on the template with the mergeable placeholders and reuse as needed (generating the document package template onto your records and merging in the content). This is called **Standard** because this is the standard functionality within Document Authoring.

However, the same standard process cannot be used when the documents are being sent to you by a vendor, customer, provider, supplier, etc. This is because the documents being sent to you are in fact being managed by the third party. This is where **Third Party Paper** document package templates come in.

For **Third Party Paper** document package templates, we are thus relegated to only setting up a template with Rules & Conditions as well as Electronic Approval Groups and Electronic Signature Groups.

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The menu links are only a subset of items as compared to the menu for **Standard** document package templates. Since we are only setting up conditions, approval groups and signature groups in our **Third-Party Paper** document package templates, this means that all of the content for these document packages will be provided after the template is generated onto our record.

After a **Third-Party Paper** document package template is generated onto a record (for example, a Contract Record), files and attachments can be uploaded to the generated document package. This is when we can add in the documents and files provided by your vendor, customer, supplier, provider, etc. Once the necessary documents and files have been uploaded, the processing of approvals and/or signatures can continue on as they normally would within a **Standard** generated document package.

Notes:

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- Any type of file can be uploaded and used from your third party be it word, excel, pdf, etc.
- The processing of approvals and signatures can also include contacts from your third party provided they are assigned to the record you generated the template from.

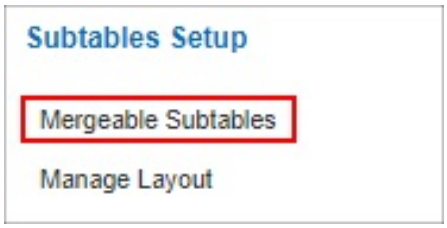
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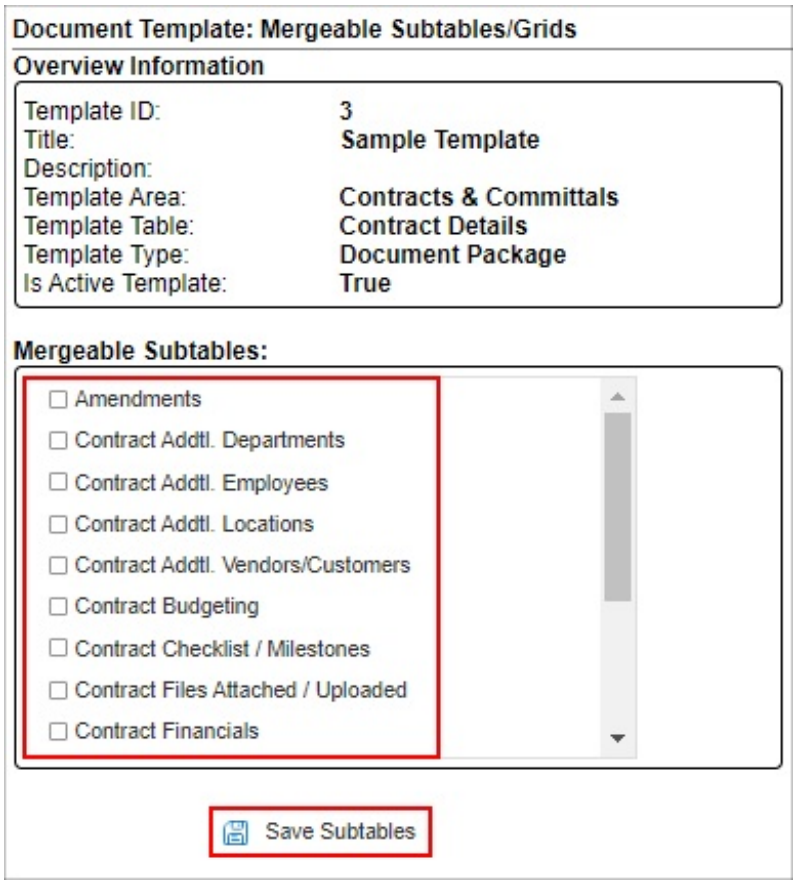
Mergeable Sub-Tables

Mergeable Sub-Tables

Sub-Tables: Mergeable Sub-Tables

In addition to individual fields, sub-tables from the record details screen can be merged onto templates as well. The **Mergeable Sub-Tables** screen allows users to select one or more of the sub girds/sub tables for the area the template is for (i.e. Template for Contracts). These selected sub tables can be used as placeholders for mergeable content in word type files (doc, docx).





The image above shows one of the selected sub tables grayed out and the other one as active (meaning a user can remove the sub table). The difference between these two is that the grayed out selected sub table has display fields assigned to it (done through the **Manage Layout** on the side menu).

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When a selected sub table has fields assigned from it to the template, it cannot be deleted until those fields are removed. Once they are all removed, the sub table can be unchecked from this list.

When finished selecting the sub tables available on this template, click **Save Sub Tables** to save and associate the selected sub tables with the template. The next step is to setup the layout of each of these sub tables. Click **Manage Layout** on the side menu.

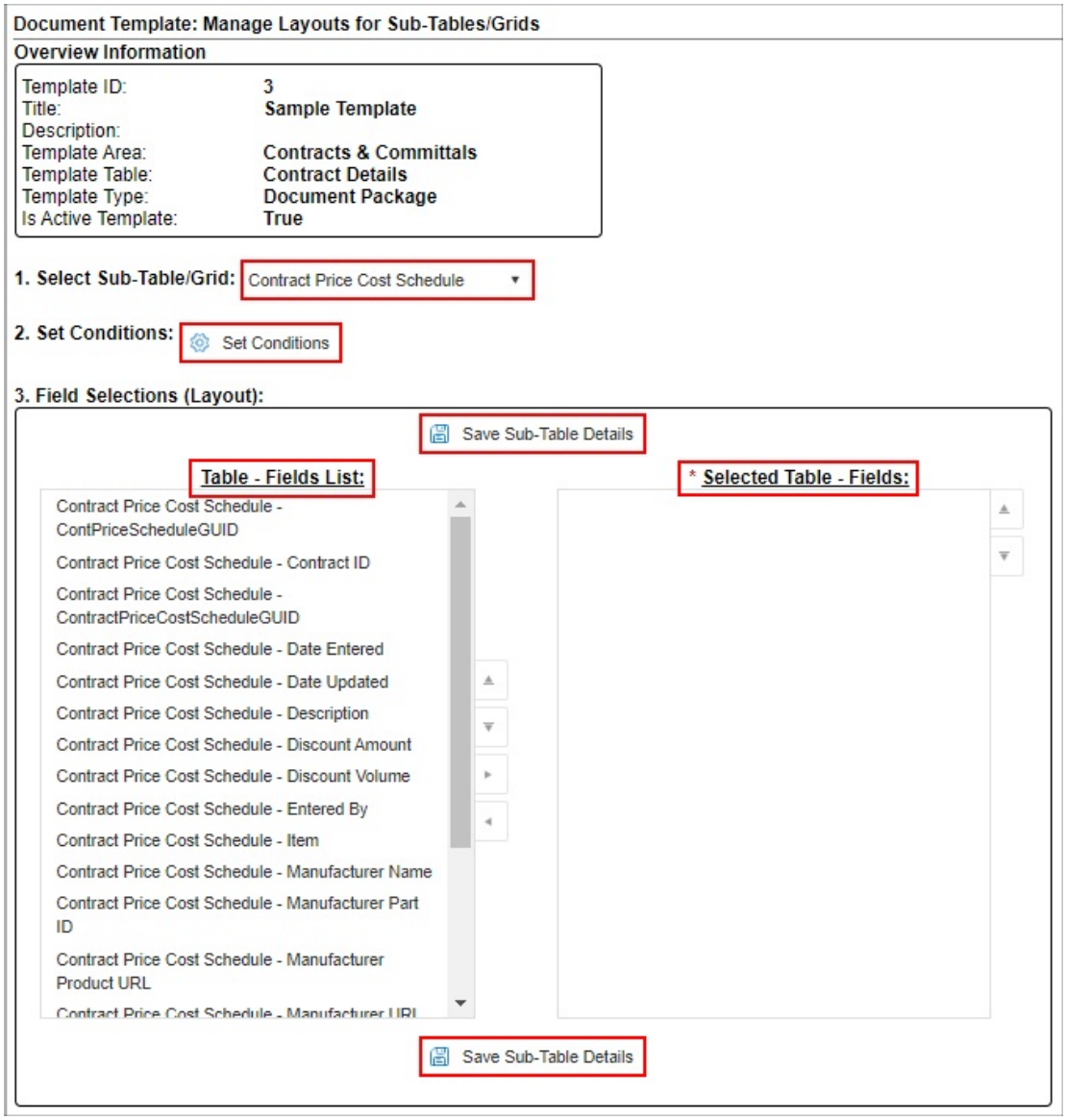
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Mergeable Subtables - Manage Layout

Mergeable Subtables - Manage Layout

Manage Document Package Template: Managing Layout (sub-tables)

The Manage Layout(s) screen allows users to specify the layout of fields for the sub table grid/table to be displayed on the document.



This screen has three major components:

1. **Drop Down Sub Table Selection**: The drop-down list of Sub-Tables/Grids
2. **Table-Fields List**: The List of all fields associated with the table selected from the drop-down list
3. **Selected Table-Fields**: The list of fields selected to be used on this sub table.

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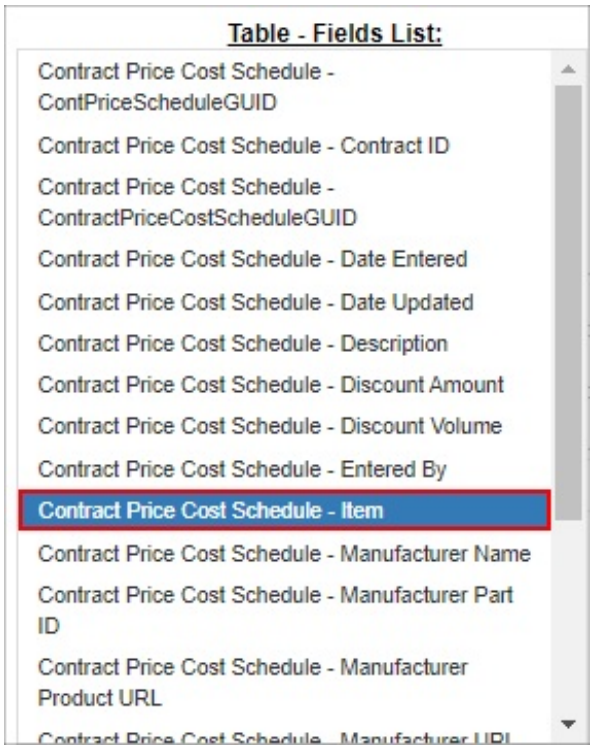
Drop Down Sub Table Selection

This drop-down list populates the two list boxes based on the sub table selected.



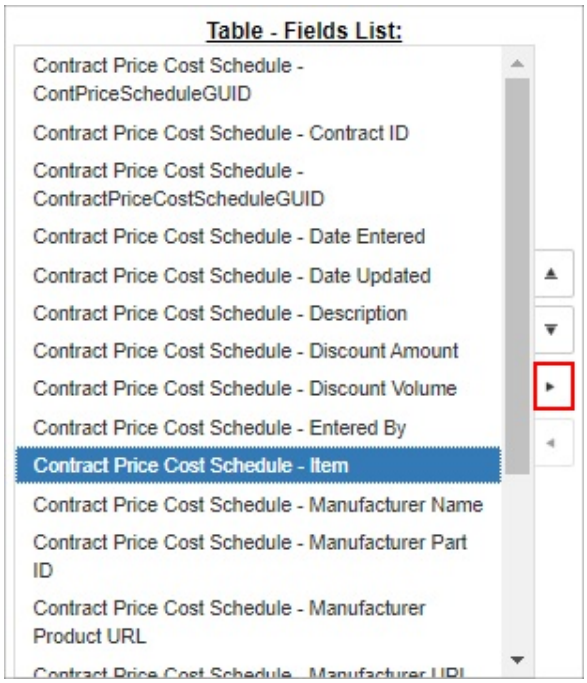
Table-Fields List (Available to be Selected)

This list shows all the remaining fields associated with the sub table selected that can be selected or used.



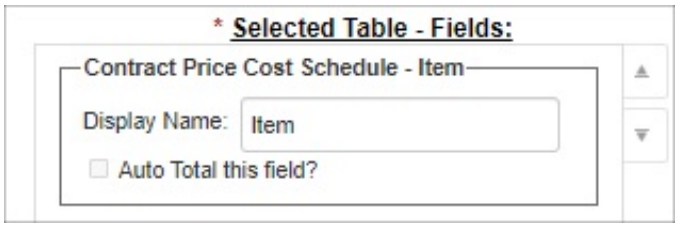
To select a field for use in the template, click the field's name (it will highlight in blue) and either drag it to the **Selected Table-Fields** list or click the **right arrow** (pointing towards the **Selected Table-Fields** list).

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Selected Table-Fields

This list shows the assigned fields for the sub table. To begin managing a field from this list, click the field (it will highlight in blue).



The selected field can now be managed, re-ordered, or removed from the list.

- **Reordering:** To re-order the fields either click and drag the field to the position desired, or click the up and down arrows to the right of the list.

Note: The order of fields from top to bottom corresponds to the layout of the fields (from left to right) in the grid when the content is merged.

- **Removing:** To remove a field once it has been selected, click on the arrow pointing to the left in between the two lists.

Note: This will remove the field from the list of selected and place it back in the list of available fields (the left list).

- **Managing:** Once a field has been selected, it can be managed. Managing a field consists of two components, the Display Name and Auto Totaling.
- **Display Name:** This is the text that will appear at the top of this column in the table when it is merged onto a document.

Note: This text initially defaults to the **Display Name** of the Field.

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- **Auto Totaling:** This check box denotes if the column should be auto totaled and have this total placed at the bottom of this column in the table when it is merged onto a document.

Note: This check box is only available for integer, decimal and currency field types.

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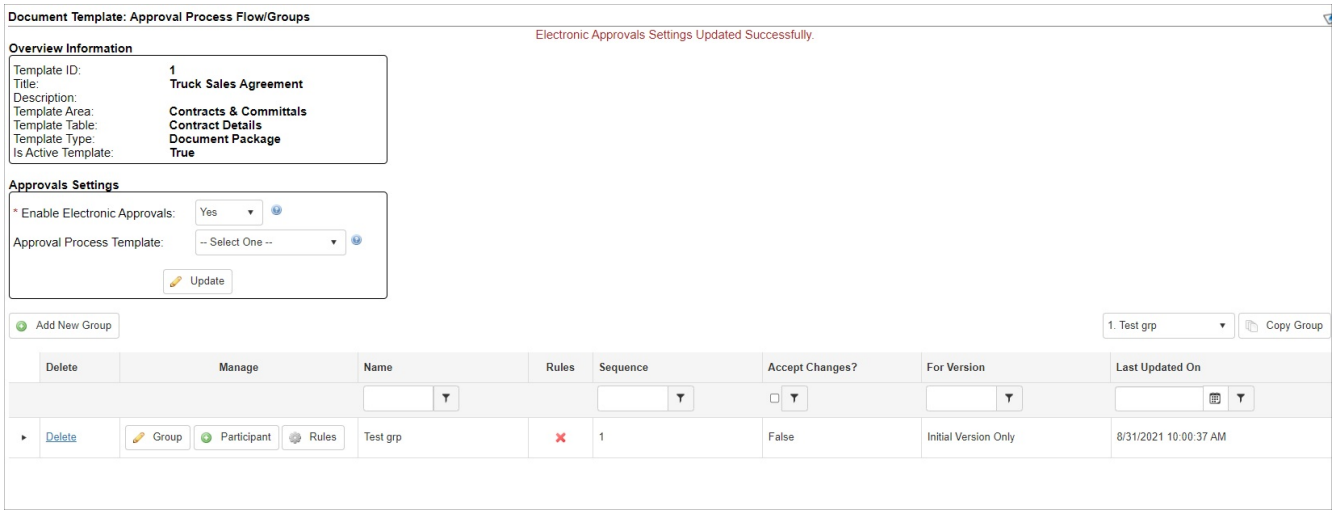
1. Managing E-Approval Flow/Groups

Managing E-Approval Flow/Groups

E-Approval Flow/Groups: Managing

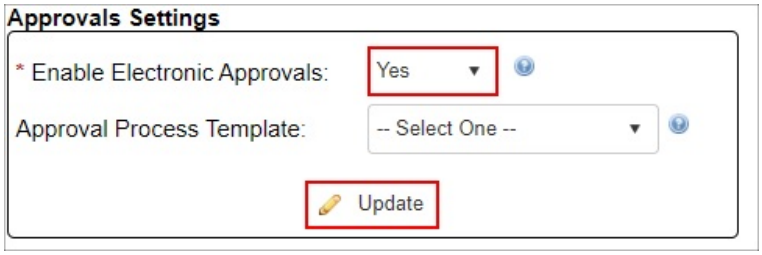
The E-Approval Flow/Groups Management page is where the processing of approvals can be defined. Approvals are broken down into Approval Groups and their assigned Participants. The Approval Groups manage the structure of the processing of approvals in a top-down sequential order (Group 1 goes, then Group 2, etc.).

Note: The setup for E-Approval Flow/Group applies only to organizations with the **Document Authoring** add-on module.



Approval Settings

The first item to be configured on this screen is the **Approvals Settings** box.



For **Electronic Approvals**, the only setting to configure is if electronic approvals are enabled or disabled for this template document package. If set to Yes, all document packages generated based off of this template will have the electronic approvals section enabled. If set to No, all document packages generated based off of this template will have the electronic approvals section disabled.

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Notes:

Modifying this setting will only affect document packages generated in the future. Document Packages generated in the past will remain how they were.

If this setting is enabled (set to Yes), there must be at least one (1) **Approval Group** created and one (1) **Participant** assigned to that group in order for this template document package to be available to be generated.

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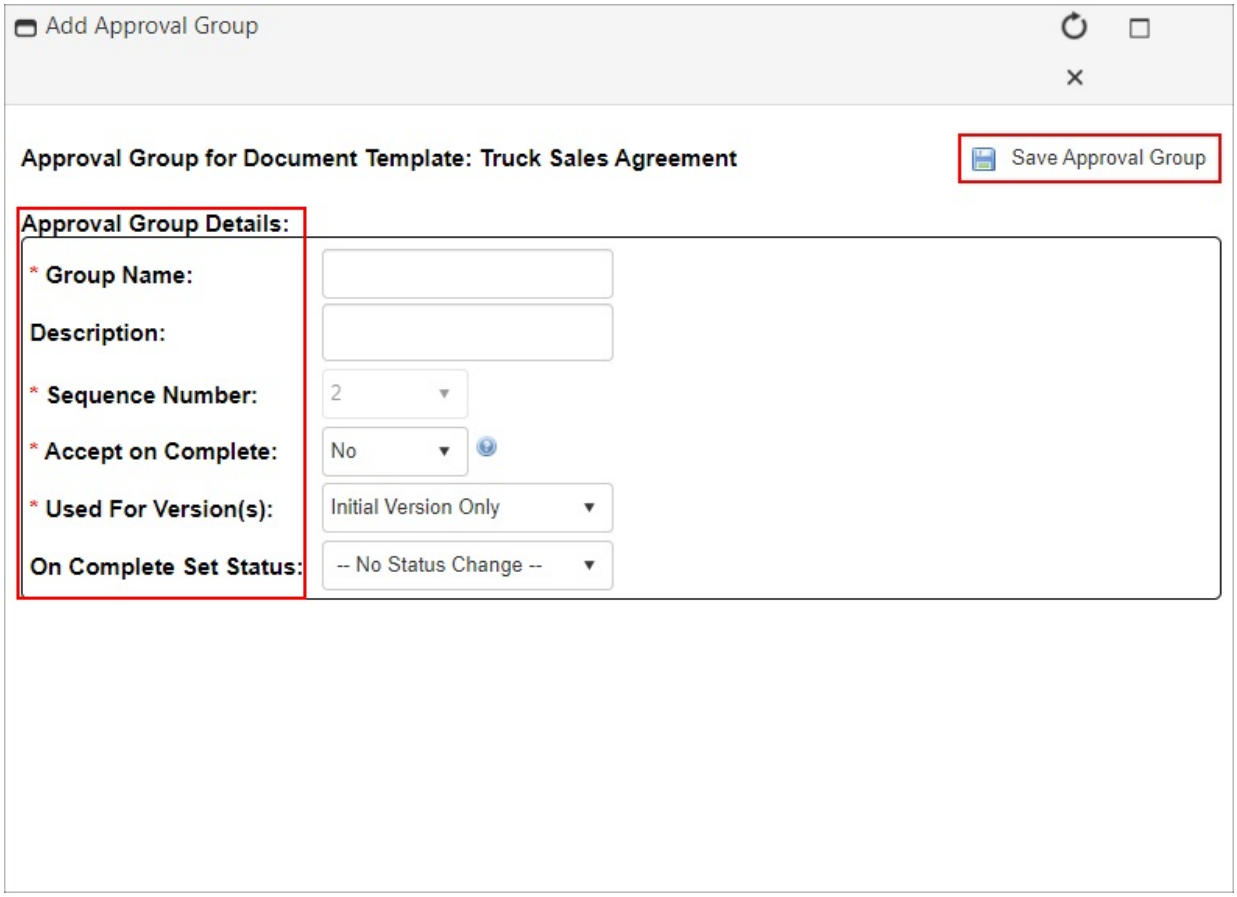
2. Adding An Approval Group

Adding An Approval Group

E-Approval Flow/Group: Adding a New Approval Group

To add a new Approval Group, click **Add New Group** - located just above the Approval Groups Grid.

Note: The setup for **E-Approval Flow/Group** applies only to organizations who have the **Document Authoring** add-on module.



Each new group requires the **Name**, **Sequence Number**, **Accept on Complete**, and **Used for Version(s)** fields to be populated prior to being created.

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1. **Group Name:** Provide the text of the name for this approval group
2. **Sequence Number:** This is automatically derived on creation (placed as the last approval group in the sequence). After creation, this can be modified.
3. **Accept on Complete:** Should all Track Changes on word documents (.doc & .docx) be accepted on completion of this approval group during an approval process?
4. **Used for Version(s):** For what version(s) is the approval group valid? (Initial Version Only, Additional/Modified Versions, or All Versions)

When a template is initially generated, all the attachments/documents are generated as the initial version (or version 1). These generated documents can then be downloaded and modified as needed by those internal employees who have manage/edit access to the parent record of the generated document (the Contract, Solicitation, Employee, Purchase Orders, Requests, or Vendor) Any modifications to these documents will be uploaded as new versions to the document (thus creating additional/modified versions). This is how the system determines if the processing of approvals is following the initial version only, or the additional/modified versions.

Once all the information is provided, click **Save Approval Group**.

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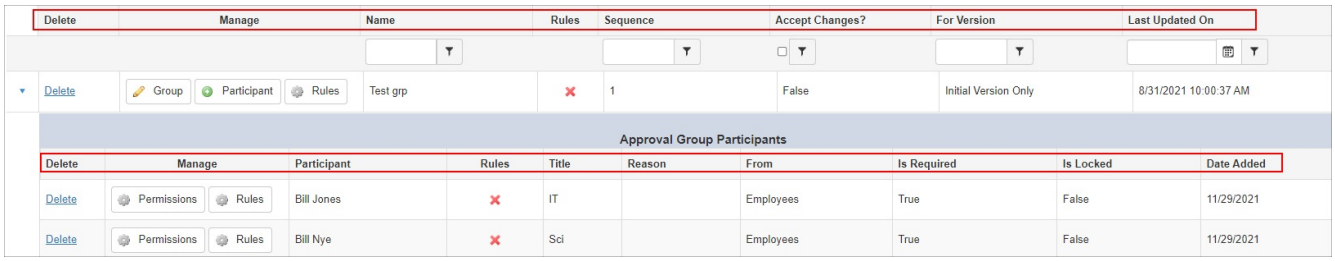
3. Approval Groups Grid

Approval Groups Grid

E-Approval Flow/Group: Approval Groups Grid

This grid displays all of the approval groups created for the template (shown in sequential order) along with the participants assigned to each group.

Note: The setup for **E-Approval Flow/Group** applies only to organizations who have the **Document Authoring** add-on module.



The **Approval Groups** area is broken down into two grids, the primary group grid and then sub/details participants grid for each group. To view the participants assigned to a group, click the caret next to each group.

The primary grid for approval groups provides the following information and columns:

• **Delete Group**: Delete/remove the group and all of its participants.

• **Manage Group:** Has three (3) buttons:
- Manage Group Information
- Add a Participant
- Manage Rules & Conditions for Group

• **Name:** The Name of the Approval Group

• **Rules:** Displays a **red X** if there are no rules/conditions for the group or a **green check mark** if there are.

• **Sequence:** The Sequence Number of the group

• **Accept Changes:** Displays if the approval group forces all word document track changes to be accepted when the approval group is competed (prior to moving to the next approval group)

• **For Version:** Displays the version of the document(s) for which the group is used

•**Last Updated On:** Displays when the approval group was last updated

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The sub/details grid for each approval group's participants provides the following information and columns:

• **Delete Participant:** Delete/remove the participant from the approval group

• **Participant Name:** The display name of the participant selected

• **Participant Title:** The title provided for this participant (used to uniquely identify this participant to this template document package)

• **Reason:** The details/information on why the participant is associated with the approval group. (if any)

• **From:** Denotes where the participant is from. Participants can be from:
- **Internal Employees**
- **External Customer Contacts**
- **Employee Roles & Groups**

• **Is Required:** This setting determines if a person must be a participant in the process
- **True** – This person must be a part of the approval process. They must be able to make and approve changes within the process.
- **False** – This person is optional in the process. If no changes are made and the document is accepted within that participant's group, the participant will not be notified. If changes are made, the participant will be notified and will have to accept the changes to the document as well.

• **Is Locked:** Denotes if the participant can be removed on a generated document package from this template

• **Date Added:** The date the participant was added to the approval group.

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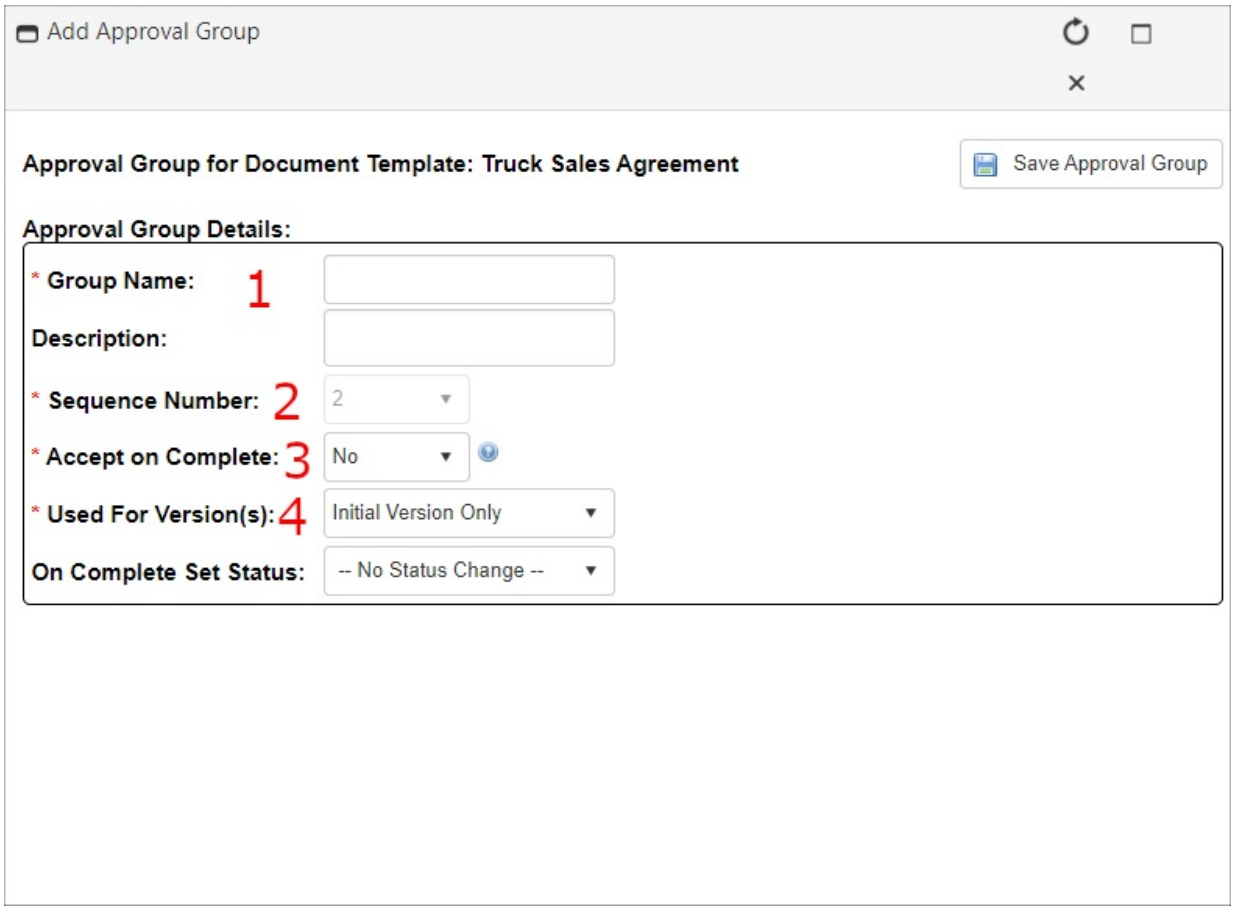
4. Adding a Participant to an Approval Group

Adding A Participant to an Approval Group

E-Approval Flow/Group: Adding a New Approval Group and Participant

Note: The setup for E-Approval Flow/Group applies only to organizations with the **Document Authoring** add-on module.

To add a new Approval Group, click **Add New Group** above the Approval Groups Grid. A pop-up window displays.



Each new group requires the **Name**, **Sequence Number**, **Accept on Complete**, and **Used For Version(s)** fields to be populated prior to being created.

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1. **Group Name:** Provide the text of the name for this approval group

2. **Sequence Number:** This is automatically derived on creation (placed as the last approval group in the sequence). After creation, this can be modified.

3. **Accept on Complete:** Should all Track Changes on word documents (.doc & .docx) be accepted on completion of this approval group during an approval process?

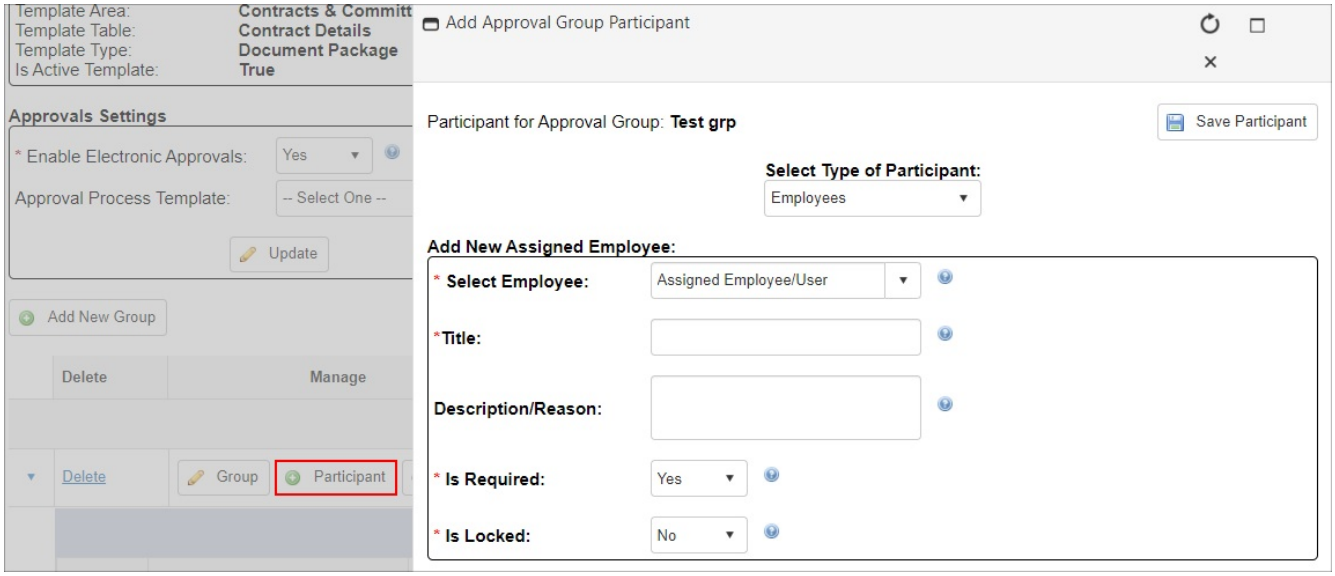
4. **Used for Version(s):** For what version(s) of the document is the approval group valid? (Initial Version Only, Additional/Modified Versions, or All Versions)

Note: When a template is initially generated, all the attachments/documents are generated as the initial version (or version 1). These generated documents can then be downloaded and modified as needed by those internal employees who have manage/edit access to the parent record of the generated document (the Contract, Solicitation, Employee, Purchase Orders, Requests, or Vendor) Any modifications to these documents will be uploaded as new versions to the document (thus creating additional/modified versions). This is how the system determines if the processing of approvals is following the initial version only or for the additional/modified versions.

Once all the information is provided, click **Save Approval Group**.

Adding a Participant to an Approval Group

To add a participant to an approval group, click **Participant** for the approval group in the approval group grid.



There are three (3) distinct types of participants that can be added to an **Approval Group**:

- **Internal Employees**
- **External Company Contacts**
- **Employee Roles & Groups**

For **Internal Employees** and **Employee Roles & Groups**, selection of the Employee or Group being used for this participant is required

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Employee Roles & Groups provides a list of all roles and groups defined through the employee management area of Contract Insight.

The Internal Employees will provide a list of all employees defined through the employee management area including two additional items:

1. **Assigned Employee/User:** This dynamically assigns the primary employee assigned to the contract or solicitation to this participant when the template document package is generated for a contract or solicitation.

2. **Assigned Employee/User's Manager:** This dynamically assigns the manager of the primary employee assigned to the contract or solicitation to this participant when the template document package is generated for a contract or solicitation.

Note: **External Company Contacts** cannot be specifically selected at this point, because we are only setting up a template, and therefore do not know what vendors/customers are going to be assigned to the contract and/or solicitation. These participant entries get saved as saying [Assign on Merge] for the name of the participant.

All three types of participants must have a title provided as well as specifying if the participant is locked. **Is Locked** specifies if the participant can be removed on a generated document from this template.

Once all the information is provided, click **Save Participant**.

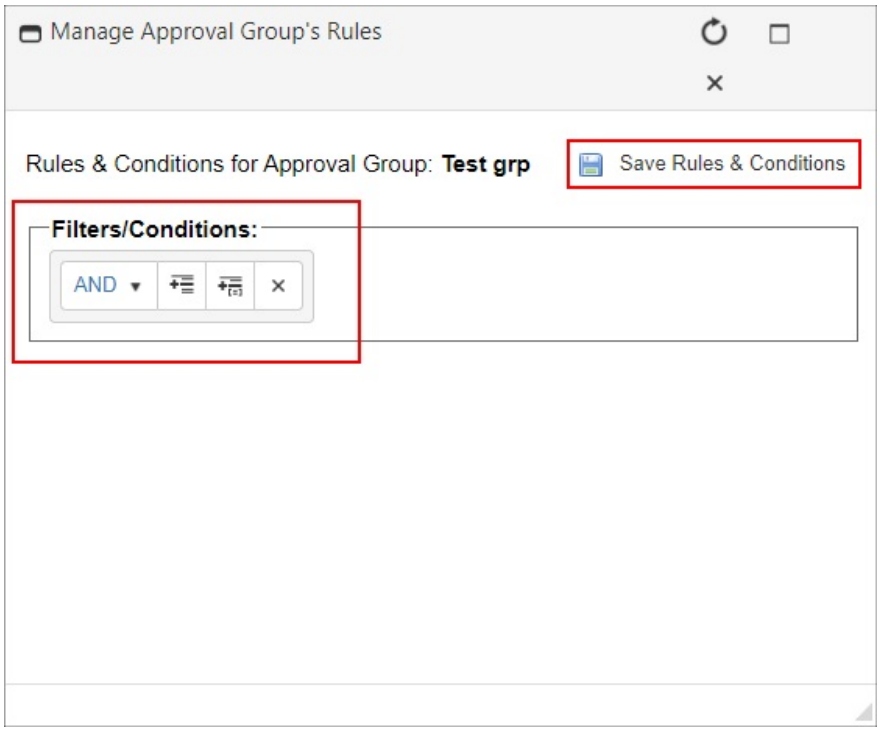
Approval Group Rules & Conditions

Each approval group can have specific rules and conditions defined to determine when the group actually gets rolled onto a generated document package. To begin working with the rules & conditions for an approval group, click **Rules** for that group's entry in the approval groups' grid.

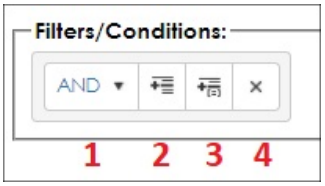


A pop-up window for managing rules & conditions displays.

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To better understand how to use the filters/conditions functionality, lets breakdown the components. In the picture below each component of the filtering control is numbered:



1. **And/Or Selector**: Used to determine if a new expression is being added as an AND or OR condition

2. **Add New Filter Expression**: Adds a new filter expression to the list of conditions (takes into consideration the **And/Or Selector**)

3. **Add Expression Group**: Adds a new sub-grouping of expressions to be used in complex conditions (takes into consideration the **And/Or Selector** between groups)

4. **Remove Filter Item**: Removes the filter/condition from the list of applied filters and conditions

Once the necessary conditions have been defined, click **Save Rules & Conditions**.

Note: The rules and conditions at the approval group level are a second-tier condition. This means that these rules and conditions are only checked/verified if the first-tier conditions are validated. The first-tier conditions are specified in the **Rules & Conditions** area (That page is for specifying the rules and conditions for when a template is available to be generated).

Quick Copy of an Approval Group

To quickly copy the setup of an approval group, locate the drop-down box click **Copy Group** (just above the **Approval Groups** Grid).

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To copy a group, select that group from the drop-down list and click **Copy Group**. This will create a duplicate of the selected group for this template. The copied group will initially appear as the last group in the sequence and its name has - Copied appended to it. Once the group is copied, it can be managed just like any other group.

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Approval and Signature Process Templates

Approval and Signature Process Templates

Approval and eSignature Flows/Groups: Process Templates

If a set of approvers and/or signers are going to be applied to multiple templates and the option Document Collaboration add-on module is in use, a system administrator can define **Process Templates** for easy application of those pre-defined flows/groups for approval and signature respectively.

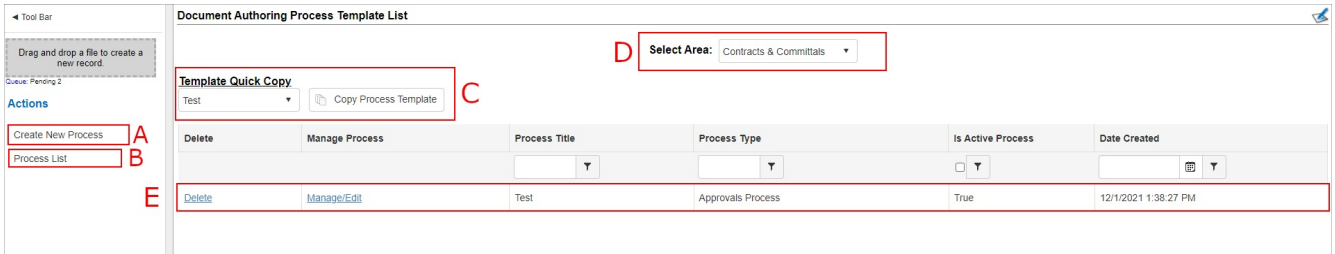
Navigate to Process Templates

Navigate to the Document Authoring Process Template List via **Manage/Setup - Document Templates - Process Template List**.



Process Template List

The process template list contains numerous options and data:



A. **Create New Process**: Navigate to a page to define a new process template

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B. **Process List**: Return to the Document Authoring Process Template List page

C. **Copy Process Template**: Quick copy the selected process template (useful if only needing to make a few changes)

D. **Select Area:** Module/Area selection for process templates (just like those for advanced document templates)

E. **Line Item Details**: Each process template for the selected area/module displays. System admin users can **delete** and **manage/edit** the process template and preview the details relevant to it.

Applying a Process Template - eApproval

Applying an approval process template is a swift process.

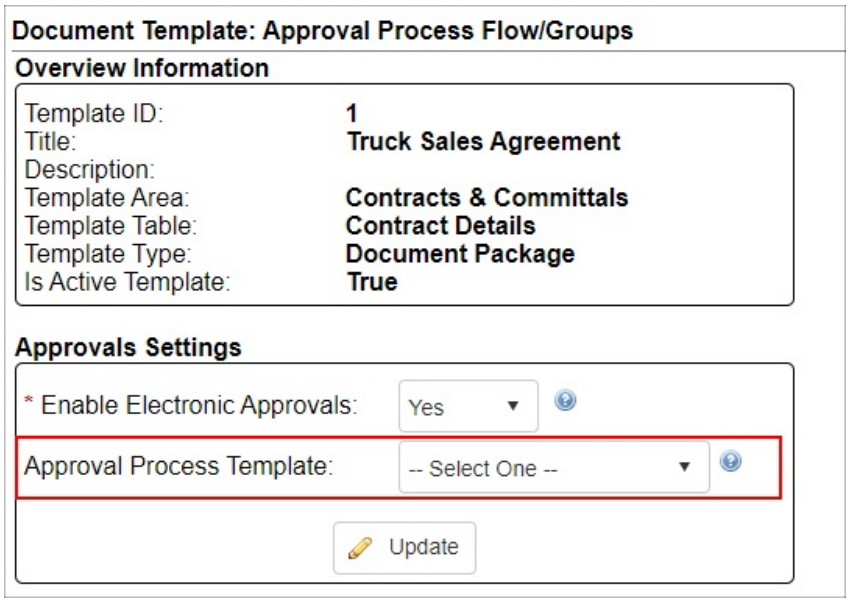
1. Navigate to the document template for the which the approval process is to be applied.

2. Click **eApproval Flows/Groups**.



3. The **Document Template: Approval Process Flows/Groups** page displays. If a template process is to be used for the document, in the **Approval Process Template** field, select the applicable template process.

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4. Click **Update**. The process template is applied.

Note: If using a process template, individually defined groups cannot be defined additionally.

Applying a Process Template - eSignature

Applying an approval process template is a swift process.

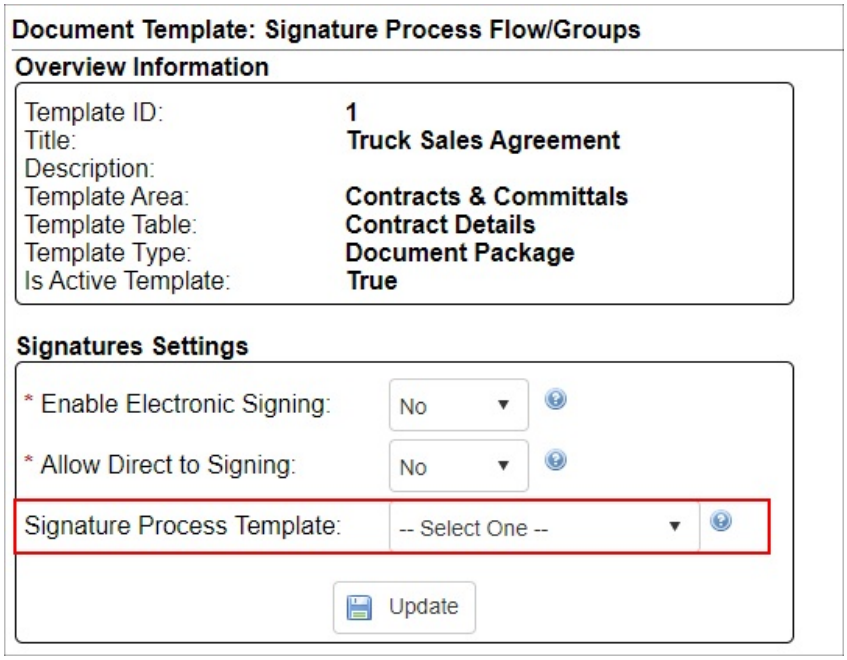
1. Navigate to the document template for the which the signature process is to be applied.

2. Click **eSignature Flows/Groups**.

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3. The **Document Template: Signature Process Flows/Groups** page displays. If a template process is to be used for the document, in the **Signature Process Template** field, select the applicable template process.



4. Click **Update**. The process template is applied.

Note: If using a process template, individually defined groups cannot be defined additionally.

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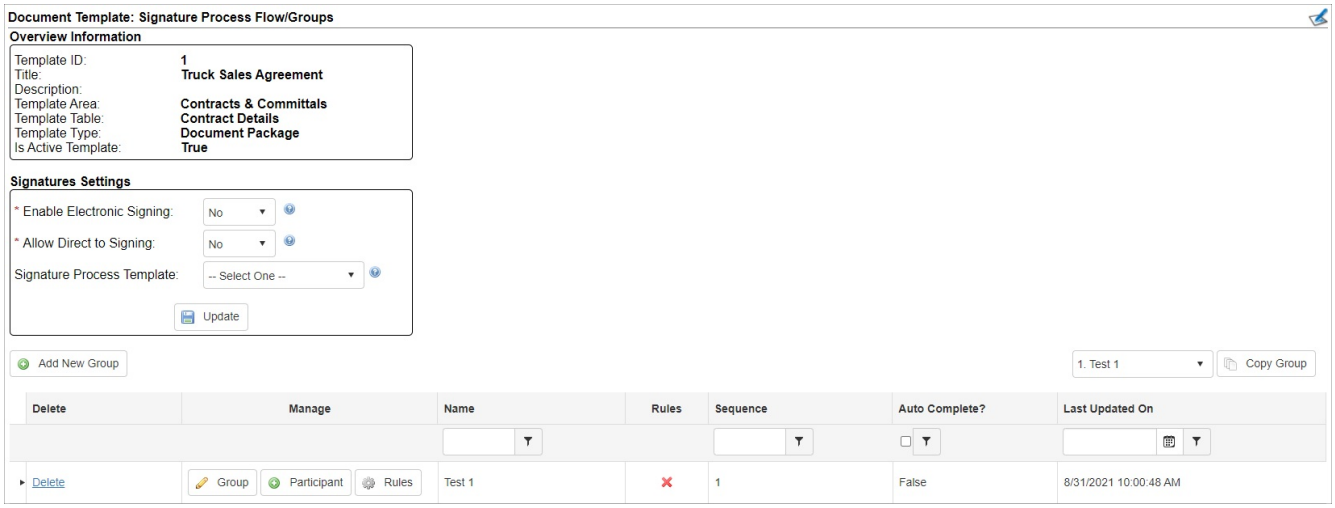
E-Signature Flow/Groups Overview

E-Signature Flow/Groups Overview

E-Signature Flow/Groups: Overview

The **E-Signature Flow/Groups Management** page is where the processing of signatures can be defined. Signatures are broken down into **Signatures Groups** and their assigned **Participants**. The Signature Groups manage the structure of the processing of signatures in a top-down sequential order (Group 1 goes, then Group 2, etc.).

Note: The setup for **E-Approval Flow/Group** applies only to organizations with the **Document Authoring** add-on module.



Signatures Settings

The first item to be configured on this screen is the **Signatures Settings** box.



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For **Electronic Signatures**, there are two settings that must be configured.

1. Enable Electronic Signing

a. Denotes if electronic signatures are enabled or disabled for this template document package.

b. If set to Yes, all document packages generated based off of this template have the electronic signatures section enabled. If set to No, then all document packages generated based off of this template have the electronic signatures section disabled.

2. Allow Direct to Signing

a. Denotes if an Electronic Signature Processes can be started without a completed **Approval Process**.

b. If set to Yes, then when a document package is generated from this template, the processing of electronic signatures is automatically opened to the generated documents. If set to No, processing of electronic signatures are not allowed except from a completed approval process for the generated document package.

c. This setting helps to ensure that if a specific template needs to go through approvals prior to signatures, then the system will ensure that it follows that route.

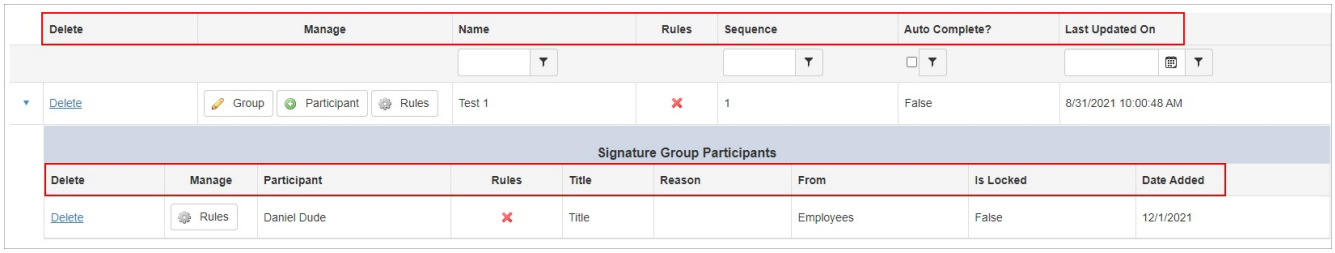
Notes:

Modifying these settings only affects document packages generated in the future. Document Packages generated in the past remain how they were.

If the **Enable Electronic Signing** setting is enabled (set to Yes), there must be at least one (1) **signature group** created and one (1) **participant** assigned to that group in order for this template document package to be available to be generated.

Signature Groups Grid

This grid displays all of the signature groups created for this template (shown in sequential order) along with the participants assigned to each group.



The signature groups' area is broken down into two grids, the primary group grid and then sub/details participants grid for each group. To view the participants assigned to a group, click the caret next to each group.

The primary grid for signature groups provides the following information and columns:

• **Delete Group**: This button will delete/remove the group and all of its participants.

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- **Manage Group**: Has three (3) options:
  1. Manage Group Information
  2. Add a Participant
  3. Manage Rules & Conditions for Group

- **Name**: Displays the Name of this Signature Group

- **Rules**: Shows a **red X** if there are no rules & conditions for the group or a **green check mark** if there are

- **Sequence**: Displays the Sequence Number of the group

- **Auto Complete**: This field is currently not used within Document Authoring

- **Last Updated On**: Displays when this signature group was last updated

The sub/details grid for each signature group's participants provides the following information and columns:

- **Delete Participant**: Delete/remove the participant from the signature group.

- **Participant Name**: The display name of the participant selected

- **Participant Title**: The title provided for this participant (used to uniquely identify this participant to this template document package)

- **Reason**: Details/information on why the participant is associated with the signature group (if any)

- **From**: Denotes where the participant is from. Participants can be from:
  a. **Internal Employees**
  b. **External Customer Contacts**
  c. **Employee Roles & Groups**

- **Is Locked**: Denotes if the participant can be removed on a generated document package from the template

- **Date Added**: The date the participant was added to the signature group.

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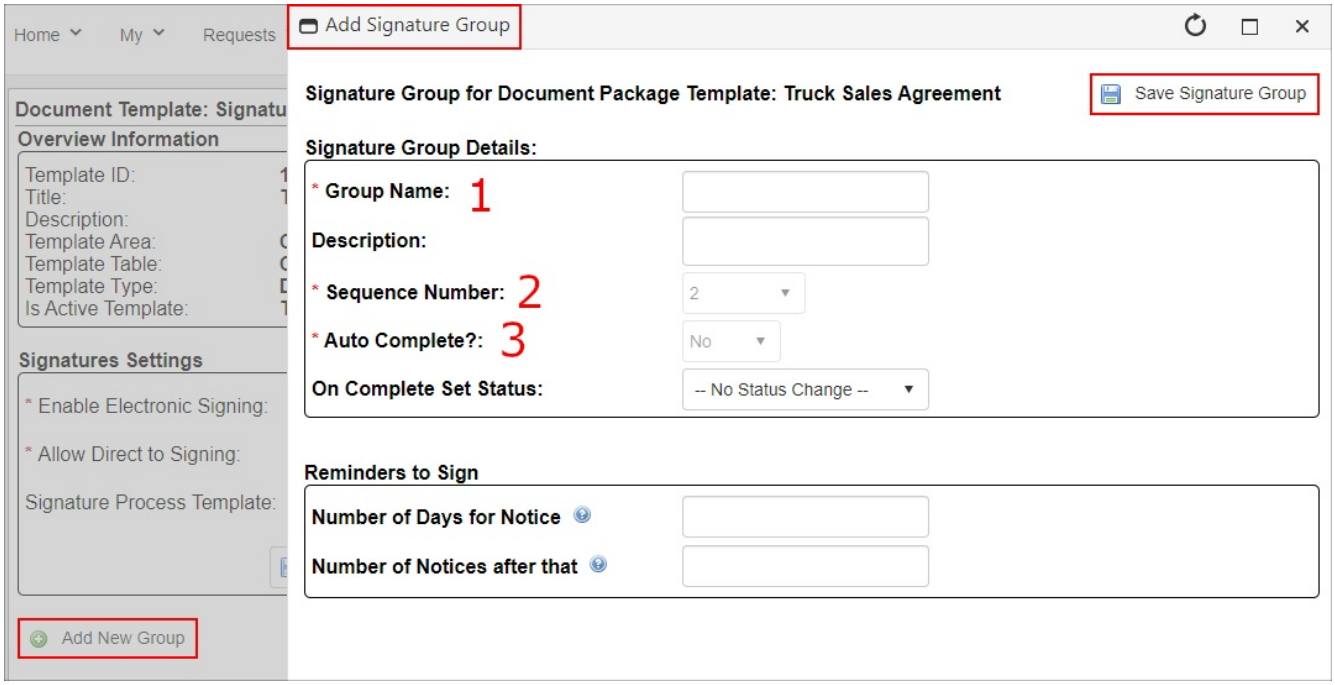
Adding a Signature Group

Adding a Signature Group

E-Signature Flow/Groups: Adding a New Signature Group

Note: The setup for E-Approval Flow/Group applies only to organizations who have the **Document Authoring** add-on module.

To add a new **Signature Group**, click **Add New Group** - located just above the **Signature Groups Grid**. A pop-up window displays.



Each new group requires the Name, Sequence Number, Auto Complete? fields to be populated prior to being created.

1. **Group Name**: Provide the text of the name for this signature group

2. **Sequence Number**: This will be automatically derived on creation (placed as the last signature group in the sequence). After creation, this can be modified.

3. **Auto Complete**: This field is currently not used by Document Authoring.

Once all the information is provided, click **Save Signature Group**.

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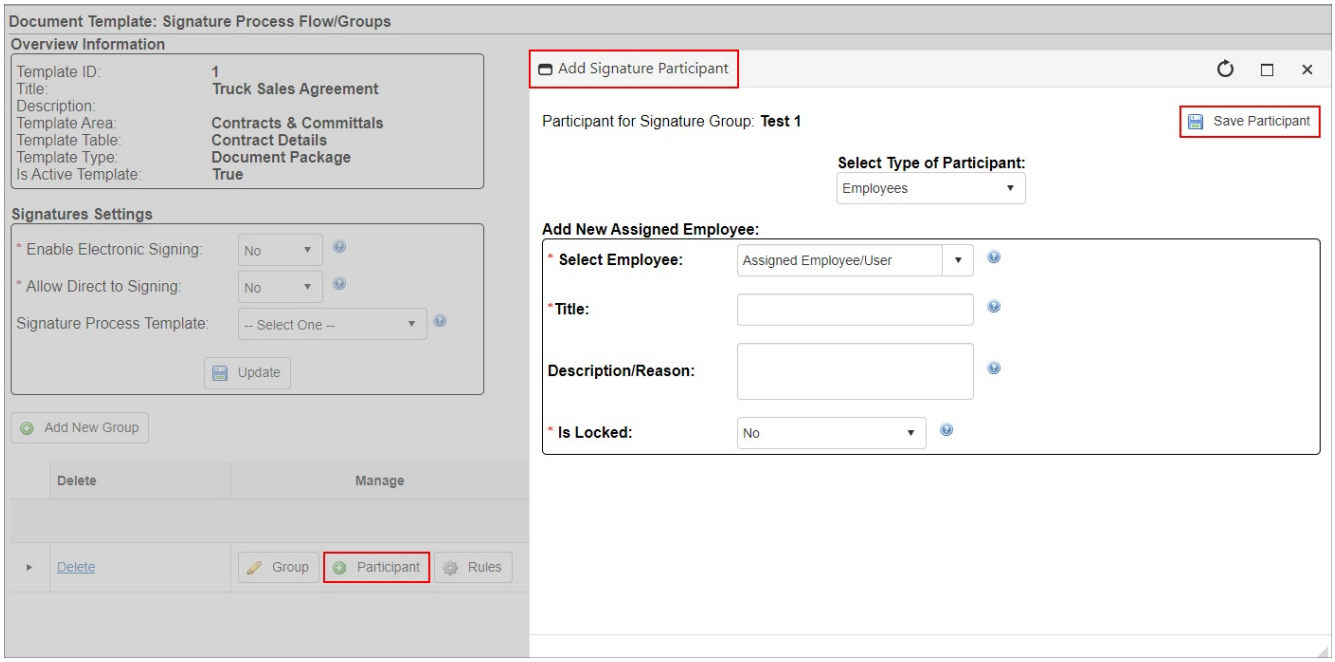
Adding a Participant to a Signature Group

Adding a Participant to a Signature Group

E-Signature Flow/Groups: Adding a Participant to a Signature Group

Note: The setup for E-Approval Flow/Group applies only to organizations who have the Document Authoring add-on module.

To add a participant to a signature group, click **Participant** for the signature group in the signature group grid.



There are three (3) different types of participants that can be added to a Signature Group:

1. **Internal Employees**
2. **External Company Contacts**
3. **Employee Roles & Groups**

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For Internal Employees as well as Employee Roles & Groups, you will be required to select the Employee or Group that is being used for this participant.

The Employee Roles & Groups provides a list of all roles and groups defined through the employee management area of Contract Insight.

The Internal Employees provides a list of all employees defined through the employee management area including two additional items:

1. **Assigned Employee/User**
   a. This will dynamically assign the primary employee assigned to the contract or solicitation to this participant when the template document package is generated for a contract or solicitation.

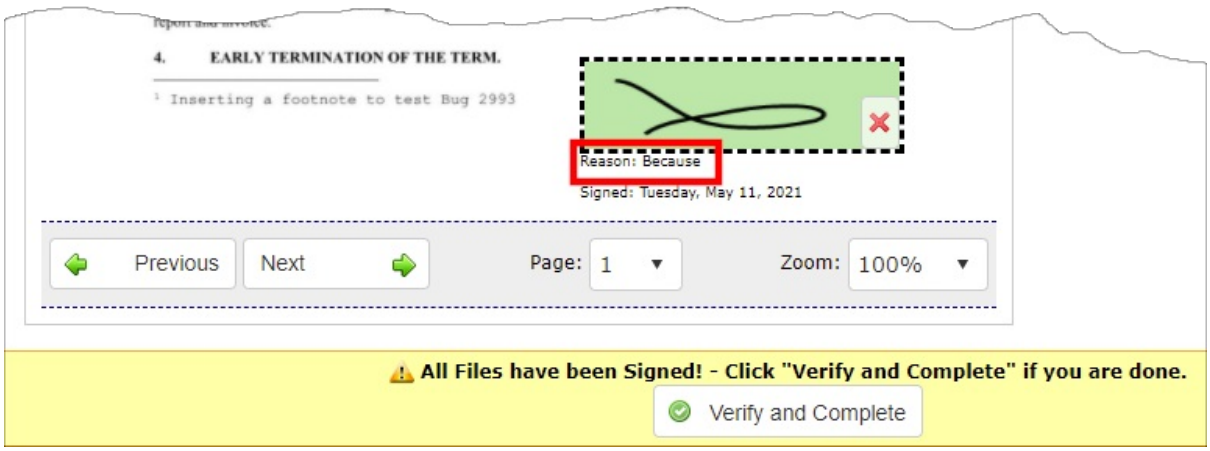
2. **Assigned Employee/User's Manager**
   a. This will dynamically assign the manager of the primary employee assigned to the contract or solicitation to this participant when the template document package is generated for a contract or solicitation.

Note: External Company Contacts cannot be specifically selected at this point, because we are only setting up a template, and therefore do not know what vendors/customers are going to be assigned to the contract and/or solicitation. These participant entries get saved as saying [Assign on Merge] for the name of the participant.

All three types of participants must have a title provided as well as specifying if the participant is locked. Is Locked specifies if the participant can be removed on a generated document from this template.

Note: If adding a reason, that reason displays on the signing portal.





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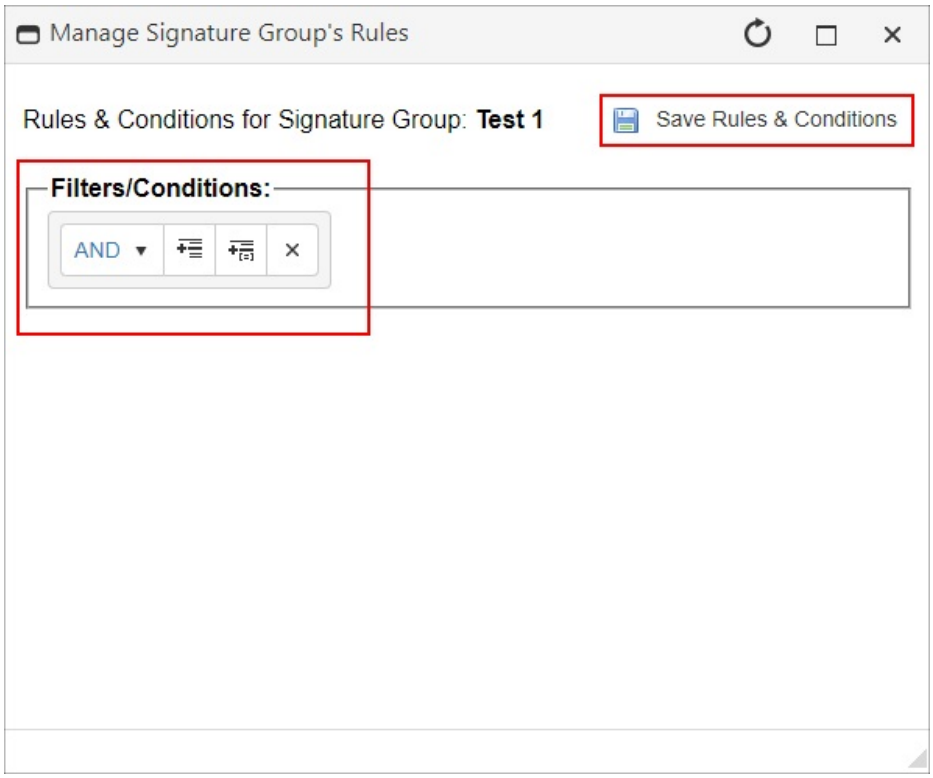
Once all the information is provided, click **Save Participant**.

Signature Group Rules & Conditions

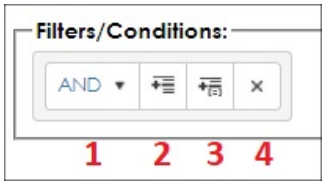
Each signature group can have specific rules and conditions defined to determine when the group actually gets rolled onto a generated document package. To begin working with the rules & conditions for a signature group, click **Rules** from that group's entry in the signature groups' grid.



Clicking **Rules** pops-up a window for managing rules & conditions for a signature group.



To better understand how to use the filters/conditions functionality, lets breakdown the components. In the picture below each of the components of the filtering control are numbered:



1. And/Or Selector: Used to determine if a new expression is being added as an AND or OR condition

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2. Add New Filter Expression: Adds a new filter expression to the list of conditions (takes into consideration the **And/Or Selector**)

3. Add Expression Group: Adds a new sub-grouping of expressions to be used in complex conditions (takes into consideration the 'And/Or Selector' between groups)

4. Remove Filter Item: Removes the filter/condition from the list of applied filters and conditions

Once the necessary conditions have been defined, click **Save Rules & Conditions**.

Note: The rules and conditions at the signature group level are a second-tier condition. This means that these rules and conditions are only checked or verified if the first-tier conditions are validated. The first-tier conditions are specified in the **Rules & Conditions** button the menu (That page is for specifying the rules and conditions for when a template is available to be generated).

Quick Copy of a Signature Group

To quickly copy the setup of a signature group locate the drop-down box and **Copy Group** just above the **Signature Groups Grid**.



To copy a group, select that group from the drop-down list and click **Copy Group**. This will create a duplicate of the selected group for this template. The copied group will initially appear as the last group in the sequence and its name will append - Copied to it. Once the group is copied, it can be managed just like any other group.

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Approval and Signature Process Templates

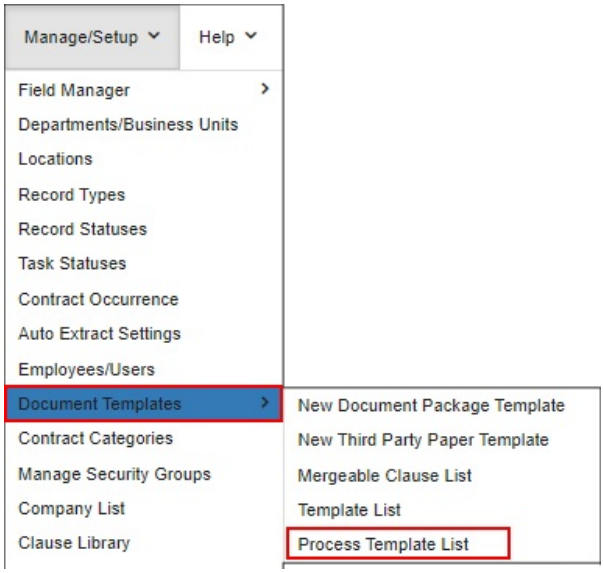
Approval and Signature Process Templates

Approval and eSignature Flows/Groups: Process Templates

If a set of approvers and/or signers are going to be applied to multiple templates and the option Document Collaboration add-on module is in use, a system administrator can define **Process Templates** for easy application of those pre-defined flows/groups for approval and signature respectively.

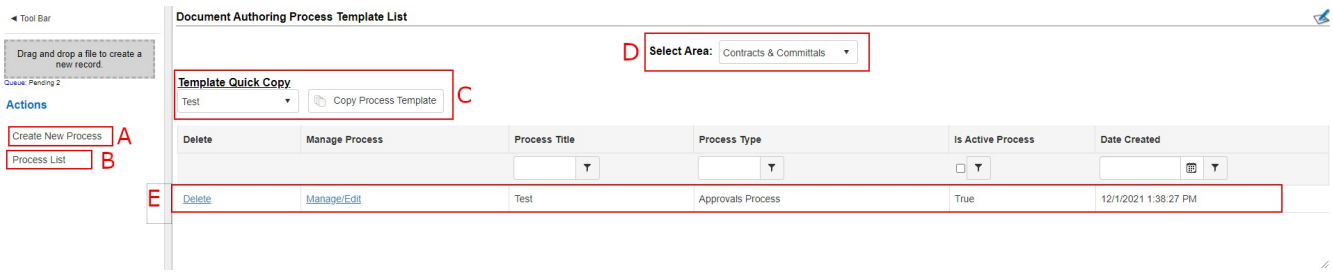
Navigate to Process Templates

Navigate to the Document Authoring Process Template List via **Manage/Setup - Document Templates - Process Template List**.



Process Template List

The process template list contains numerous options and data:



A. **Create New Process**: Navigate to a page to define a new process template

B. **Process List**: Return to the Document Authoring Process Template List page

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C. **Copy Process Template**: Quick copy the selected process template (useful if only needing to make a few changes)

D. **Select Area:** Module/Area selection for process templates (just like those for advanced document templates)

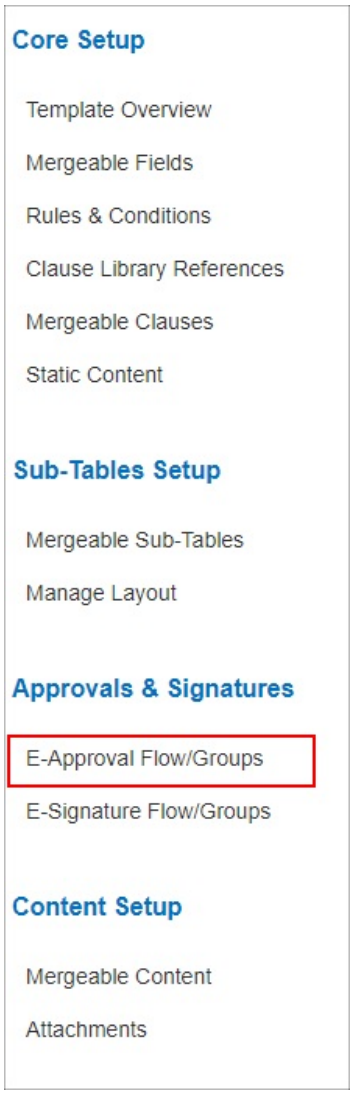
E. **Line Item Details**: Each process template for the selected area/module displays. System admin users can **delete** and **manage/edit** the process template and preview the details relevant to it.

Applying a Process Template - eApproval

Applying an approval process template is a swift process.

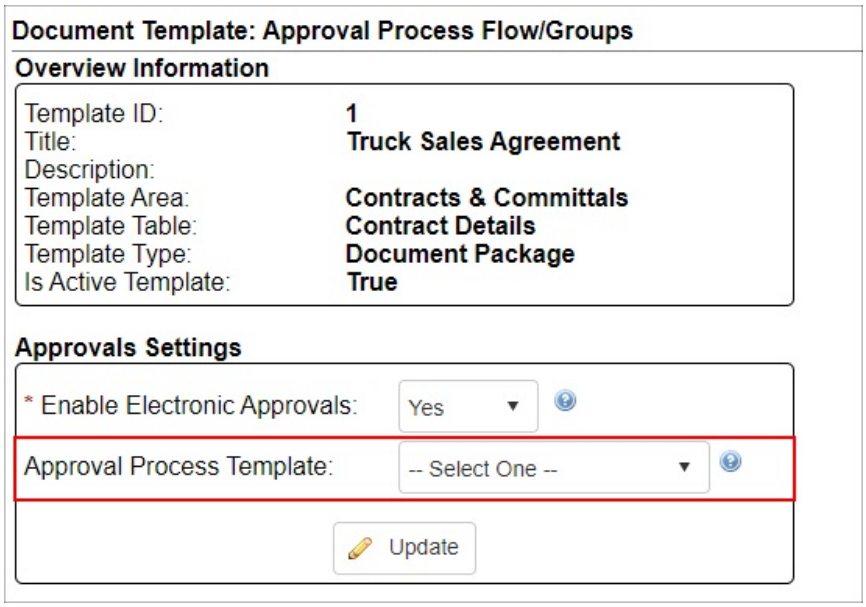
1. Navigate to the document template for the which the approval process is to be applied.

2. Click **eApproval Flows/Groups**.



3. The **Document Template: Approval Process Flows/Groups** page displays. If a template process is to be used for the document, in the **Approval Process Template** field, select the applicable template process.

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4. Click **Update**. The process template is applied.

Note: If using a process template, individually defined groups cannot be defined additionally.

Applying a Process Template - eSignature

Applying an approval process template is a swift process.

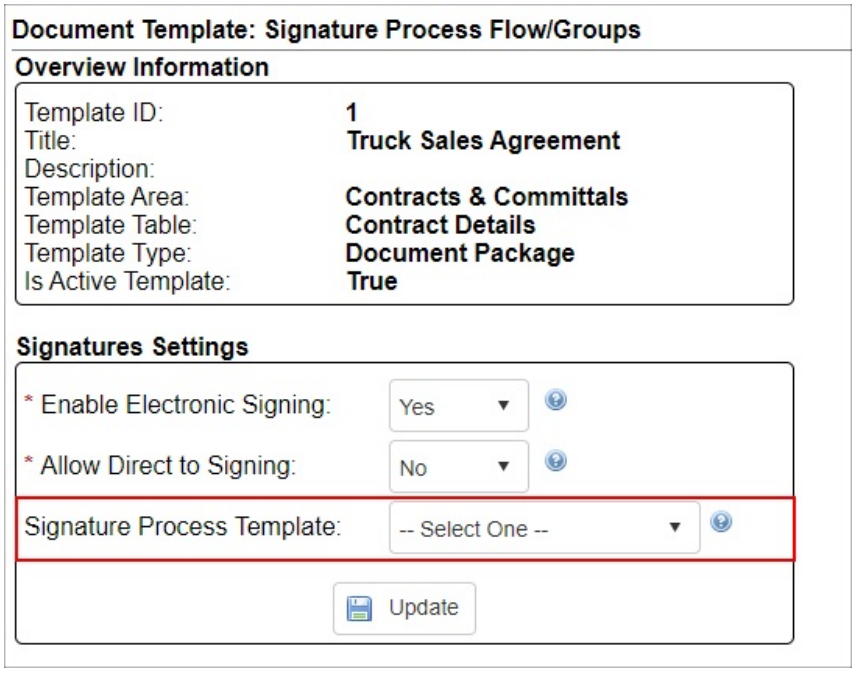
1. Navigate to the document template for the which the signature process is to be applied.

2. Click **eSignature Flows/Groups**.

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3. The **Document Template: Signature Process Flows/Groups** page displays. If a template process is to be used for the document, in the **Signature Process Template** field, select the applicable template process.



4. Click **Update**. The process template is applied.

Note: If using a process template, individually defined groups cannot be defined additionally.

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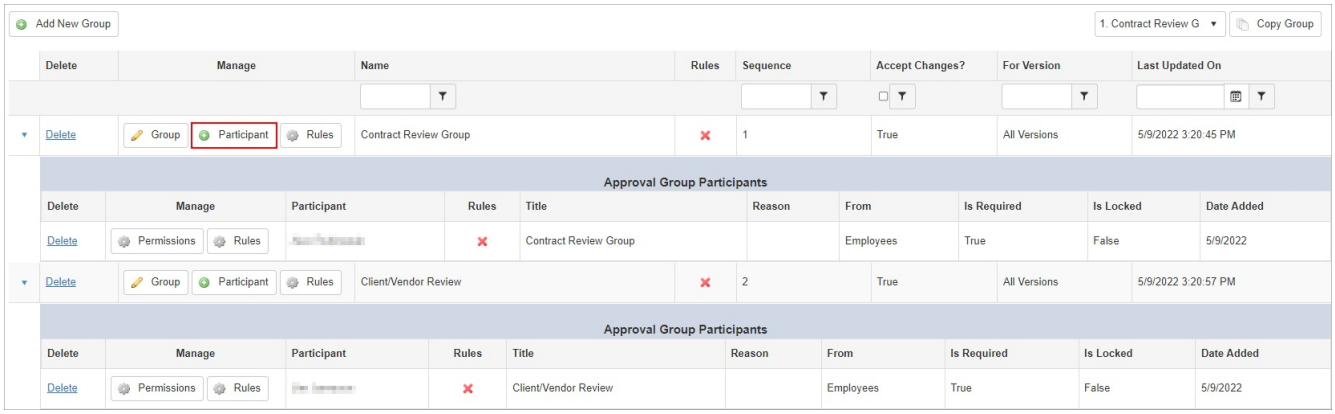
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E-Approvals Flow/Groups

E-Approvals Flow/Groups

Managing Generated Documents: E-Approval Flows & Groups

Authorized users can manage the E-Approval Process and its participants that have already been defined on the template side. Authorized Users can add new participants to the already-defined E-Approval Flow Steps and/or edit the participants who had previously been assigned.



From this page, users can perform the following actions:

1. Add Participant: Authorized Users are able to add a participant to a flow step that has already been created. Users cannot create or add a new flow step to a generated Document Package; however, they are able to assign additional employees, roles & groups or client/vendor contacts as participants in one.

Next, click the E-Approval Processing link.

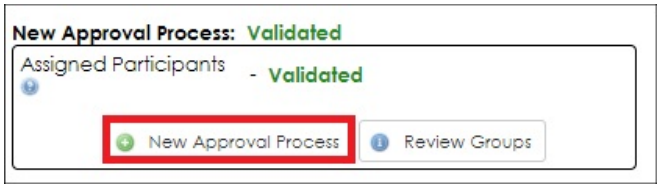
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E-Approvals Processing

E-Approvals Processing

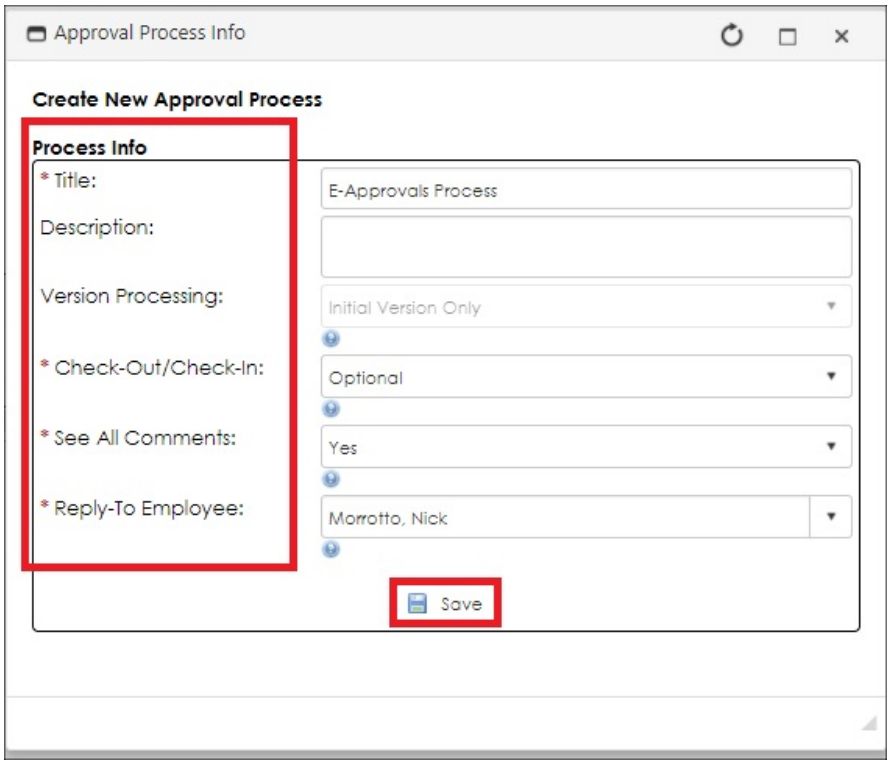
Managing Generated Documents: E-Approval Processing

The **E-Approvals** section is where authorized users will be able to create and manage new E-Approval Processes for the generated Document Package defined in the previous step.



From this page, users can perform the following actions:

1. Add New Approval Process



Authorized Users can add/setup a current **Approval Process** by clicking **New Approval Process**. After the Approval Process has been added, **Info** contains this same information that is getting keyed in. Users are prompted with the following fields:

a. Title: Title of the entire Approval Process

b. Description: General description of the Approval Process

c. Version Processing: Choice between the Initial Version Process or Additional Versions Process

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d. Checked-Out/Check-In: Determines if Participant Downloading and uploading of Files will force Check-Out and Check-In or of if it is optional.

e. See All Comments: Ability for participants to see all comments throughout the process

f. Reply-To Employee: E-mail address that will be used as the reply-to for all E-mail notifications

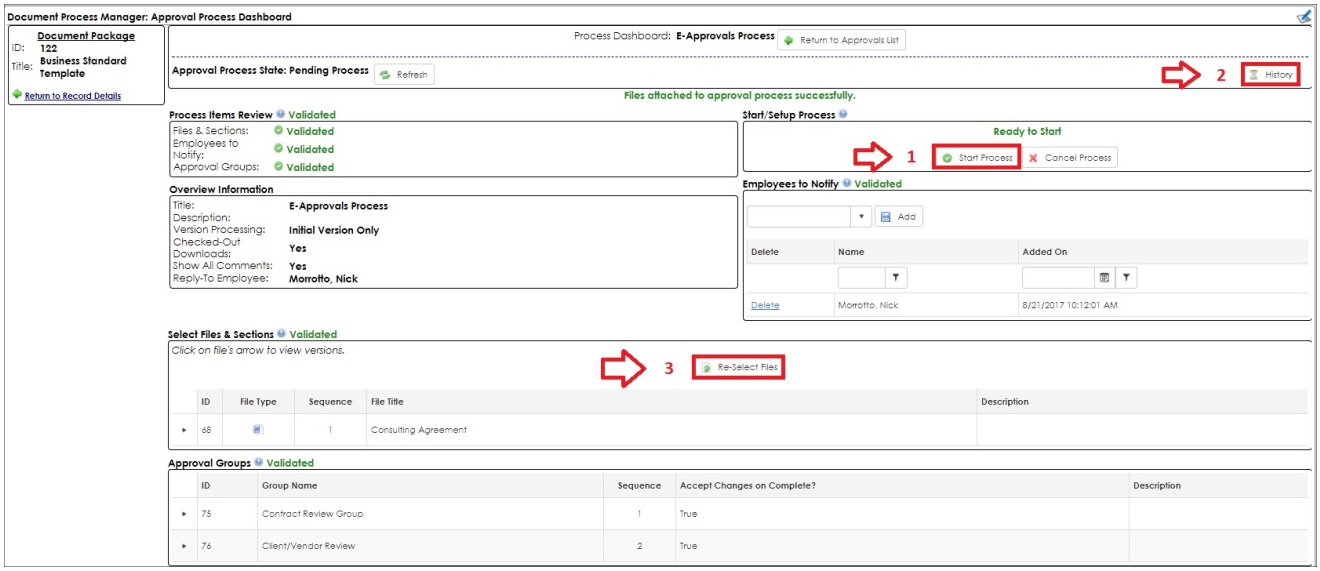


2. View History

1. A full audit log or history for the Approval Process that is currently being managed. Audit logs include the Logged Action, Logged For (Employee Name) and Logged On (Date & Time) information.

3. View the Dashboard

The Dashboard is essentially the Home Page for any E-Approval Process that an authorized user wishes to start and/or manage/monitor. The Dashboard provides a central hub for authorized users where they can start/cancel an E-Approval Process, monitor progress and assign additional employees as Reply-To.



From this screen, users can perform the following actions:

1. Start Process

1. When the user is ready to begin the E-Approval Process, click **Start Process** and the system will automatically send out notifications to the assigned participants inviting them to review and E-Approve the Document Package.
2. If any of the sections on this Dashboard are not marked as Validated with a check-mark, the system will not allow users to start a process. This means that the user is missing essential information or missed a step in setting up the generated Document Package and E-Approval Process. The section that is missing something will be marked, so users can retrace their steps back to the proper section and rectify the issue. Think of it like a Stop Light. Red means Stop, and green means Go.

2. View History

1. A full audit log of the E-Approval Process that has been selected and started. The audit log includes Logged Action, Logged For(Employee) and Logged On (Date & Time) information.

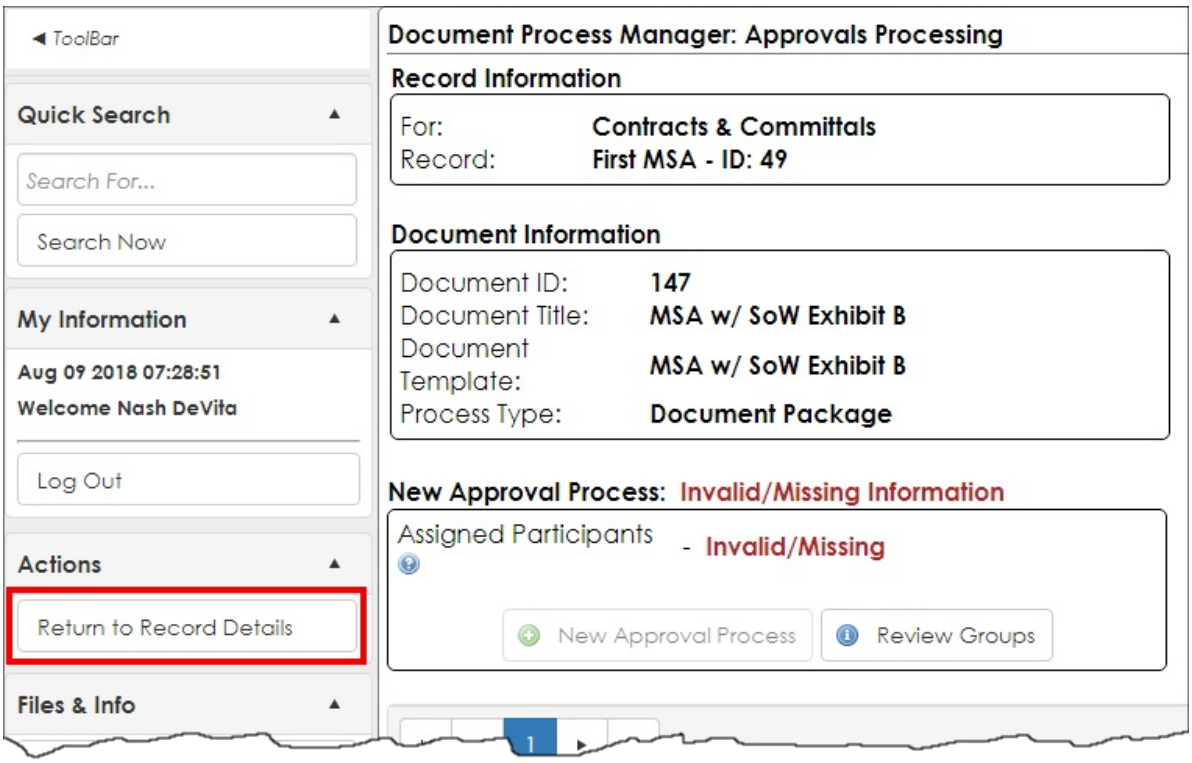
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3. Re-select Files

1. Authorized users can specify the files and/or content sections that will be used for the Approval Process.

Note: Only published versions are available.

On the side menu, click **Return to Record Details** to return to the record's details screen.



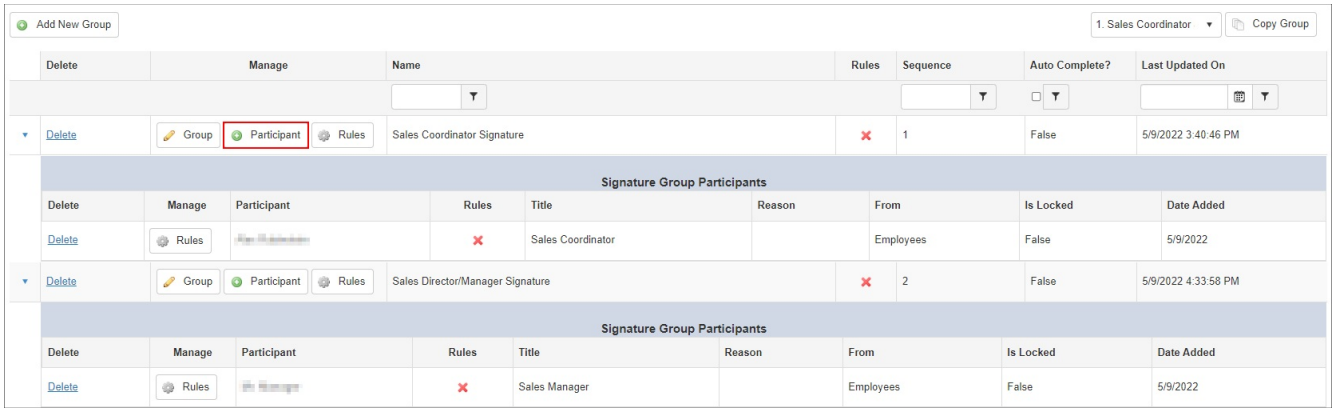
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E-Signature Flow/Groups

E-Signature Flow/Groups

Managing Generated Documents: E-Signature Flow/Groups

The next screen falls under the **E-Signature** section of the **Document Wizard** and allows authorized users to set and/or add participants to E-Signature Processes that were defined on the template side.



From this screen, users can perform the following actions:

1. **Add Participant:** Authorized users can add participants to an E-Signature Process Step that has already been created. Participants can be individual internal users, roles & groups and/or client/vendor contacts.

Note: Users cannot create new E-Signature Process Step on a generated Document Package. That is handled on the template side.

Next head to E-Signature Processing.

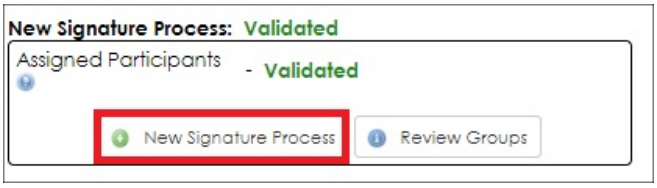
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E-Signature Processing

E-Signature Processing

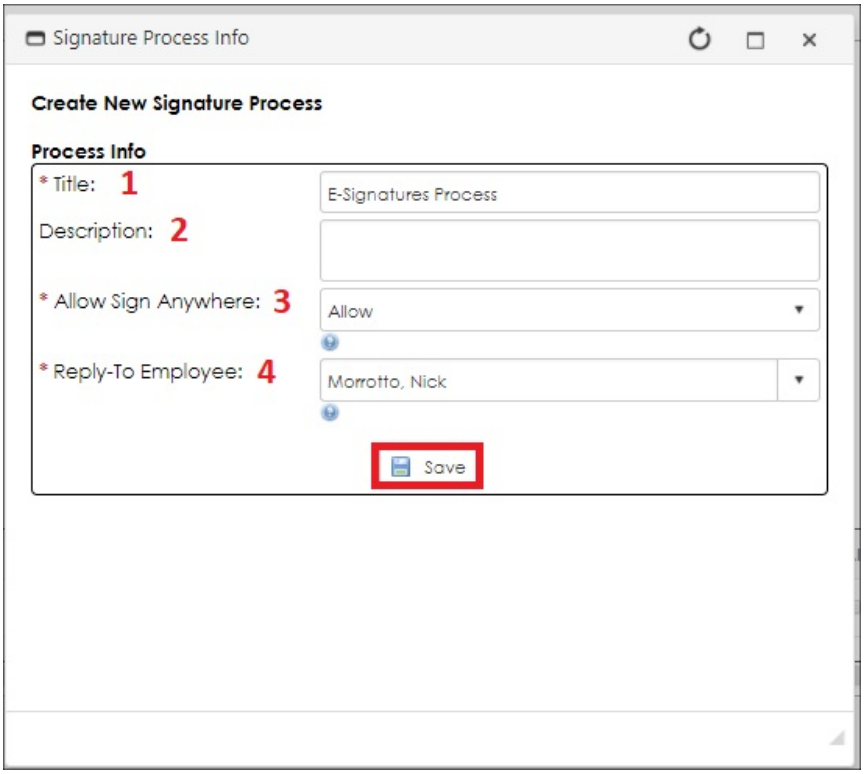
Managing Generated Documents: E-Signature Processing

The **E-Signature Processing** section is where authorized users can create and manage new E-Signature Processes for the generated **Document Package** defined on the previous step.



From this page, users can perform the following actions:

1. New Signature Process



Authorized Users can add/setup a current E-Signature Process by clicking **New Signature Process**. After the E-Signature Process has been added, the Info button contains this same information that is getting keyed in. Users are prompted with the following fields:

1. **Title:** Name of the E-Signature Process
2. **Description:** General description of the E-Signature Process
3. **Allow Sign Anywhere:** Controls if signers can sign anywhere on the document or in a specified area only
4. **Reply-To Employee:** E-mail address that will be used as the reply-to for all E-mail notifications

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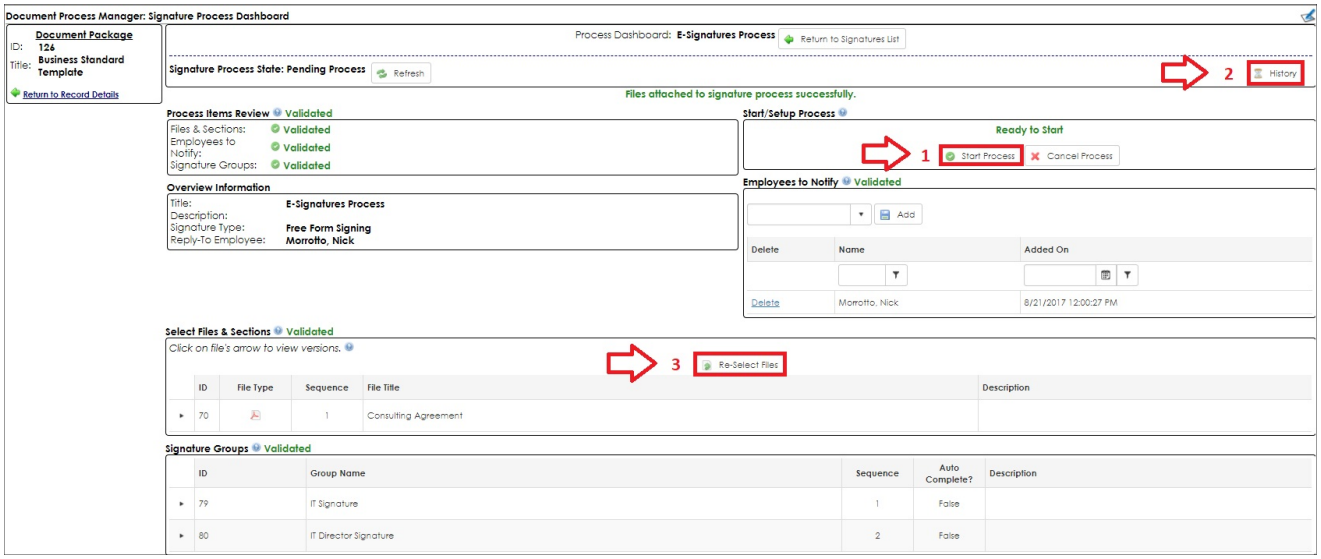


2. View History

a. A full audit log or history for the E-Signature Process that is currently being managed. Audit logs include the Logged Action, Logged For (Employee Name) and Logged On (Date & Time) information.

3. Dashboard

The Dashboard is essentially the Home Page for any E-Signature Process that an authorized user wishes to start and/or manage/monitor. The Dashboard provides a central hub for authorized users where they can start/cancel an E-Signature Process, monitor progress and assign additional employees as Reply-To.



From this screen, users can perform the following actions:

1. Start Process

a. When the user is ready to begin the E-Signature Process, simply click **Start Process** and the system will automatically send out notifications to the assigned participants inviting them to E-Sign the Document Package.

b. If any of the sections on this Dashboard are not marked as Validated with a check-mark, the system will not allow users to start a process. This means that the user is missing essential information or missed a step in setting up the generated Document Package and E-Signature Process. The section that is missing something will be marked, so users can retrace their step back to the proper section and rectify the issue. Think of it like a Stop Light. Red means Stop, and green means Go.

2. View History

a. A full audit log of the E-Signature Process that has been selected and started. The audit log includes Logged Action, Logged For (Employee) and Logged On (Date & Time) information.

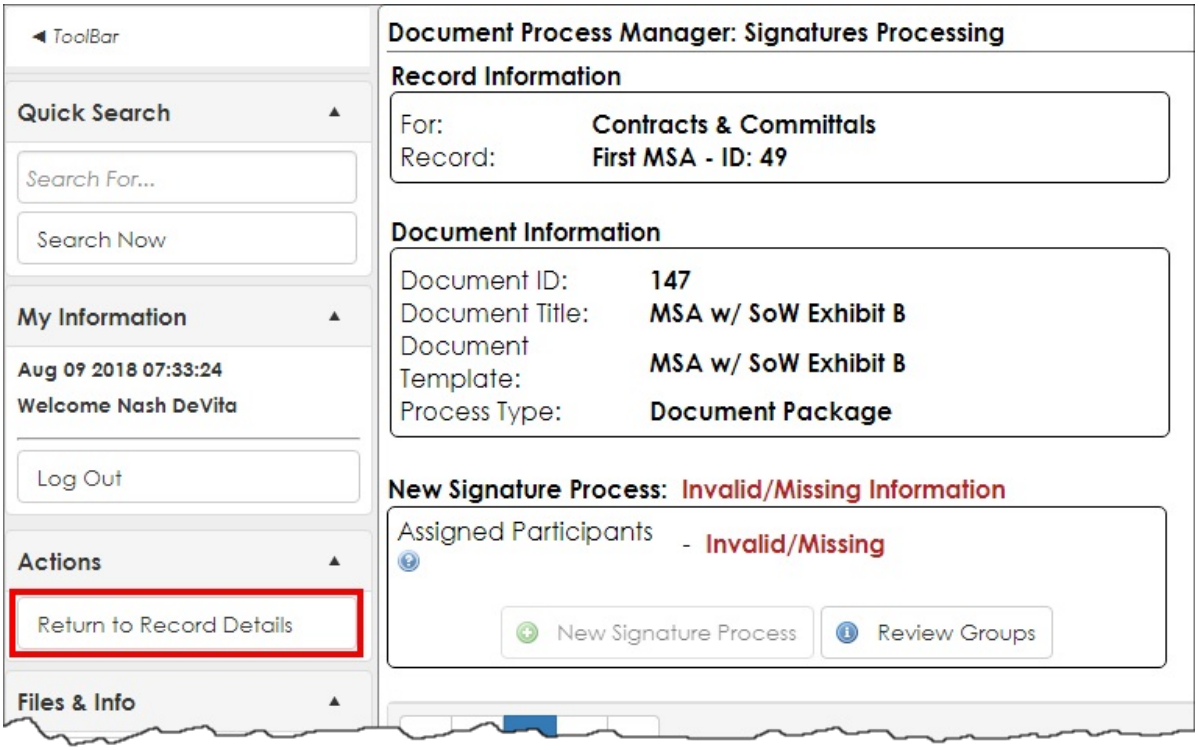
3. Re-select Files

a. Authorized users can specify the files and/or content sections that will be used for the E-Signature Process.

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Note: Only published versions are available

On the side menu, click **Return to Record Details** to return to the record's details page.



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Generated Document Packages

Generated Document Packages

Generated Document Packages

Document packages can be generated or merged for any of the four following areas:

1. Contracts

2. Requests

3. Employees

4. Vendors/Customers

5. Solicitations (with license of the eSourcing module)

6. Purchase Orders (with license of the Purchase Order module)

Each of the details pages for these areas contain menu items on the side menu for managing the Document Processing for that record.

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Generate New Document Package

Generate New Document Package

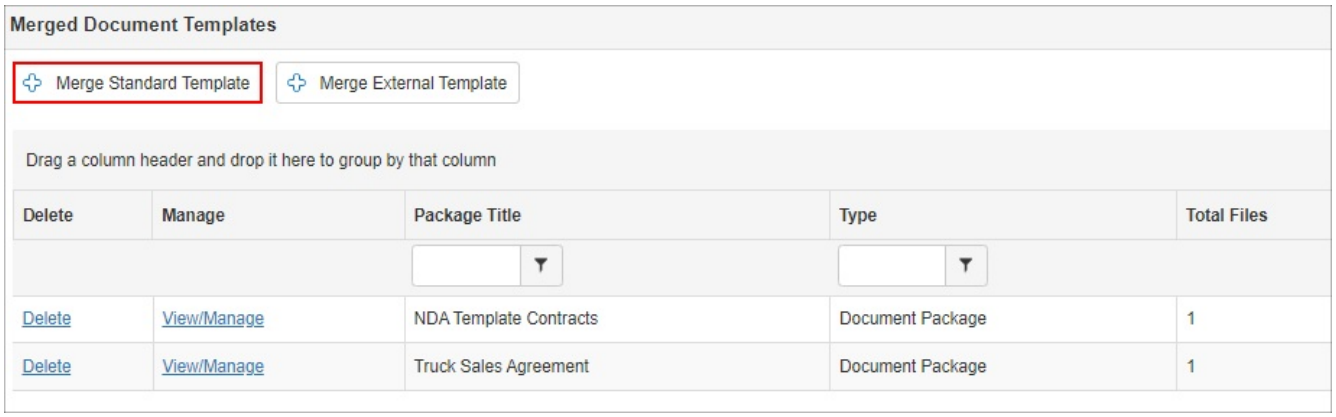
Generated Document Packages: Generate New Document Packages

Generating a new **Document Package** consists of several steps beginning on the **Contract Details** page. In order to generate a new Document Package, an authorized user must select the appropriate contract in the system for which they want to generate the Document Package. Once the contract has been selected, the authorized user will see the header **Document Processing** on the menu. Click **Merged Templates** on the side menu.

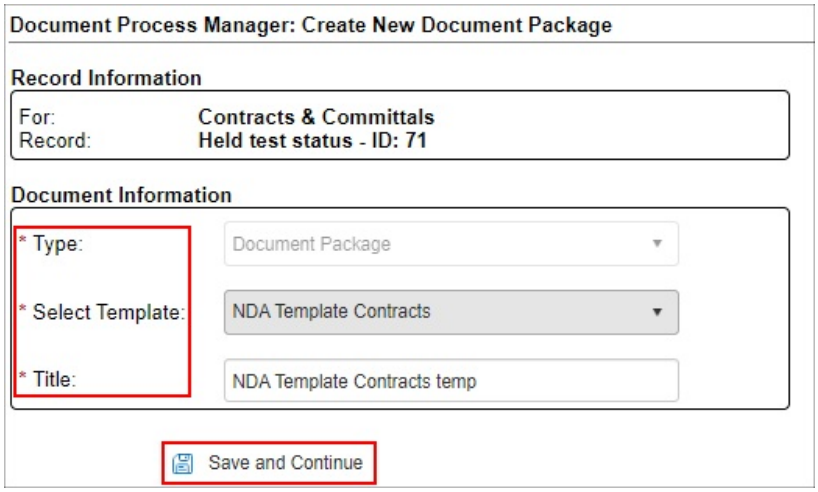
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The following page will detail all of the **Document Packages** that have been generated for the selected contract. This page is where authorized users will be able to manage, edit or delete generated Document Packages as well. Click **Merge Standard Template** on the side menu.



The next screen prompts users to key in general information about the New Document Package including the **Title**, **Type** (System-controlled field), and **Template**. The Templates available for a New Document Package are based on what Templates users have created in the Template Library and any rules associated with Templates that may restrict access to them. Once all Document Information has been selected/keyed-in, click **Save and Continue**.



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Manage Generated Document Package

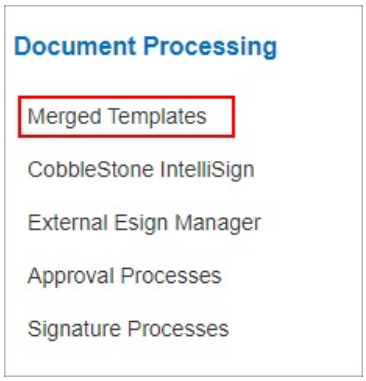
Manage Generated Document Package

Generated Document Packages: Manage a Package

Once a **Standard Template** has been generated, users can manage the document.

Navigate to Merged Documents

On the side menu of the record, click **Merged Templates**.

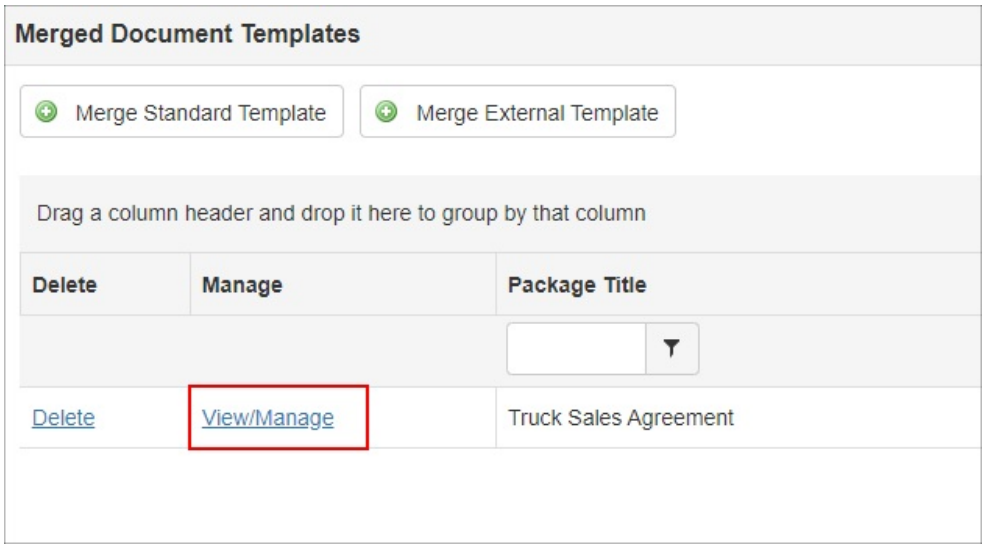


Alternatively, scroll down the page to the **Merged Document Templates** area.

Manage the File

1. Click **View/Manage** for the appropriate file.

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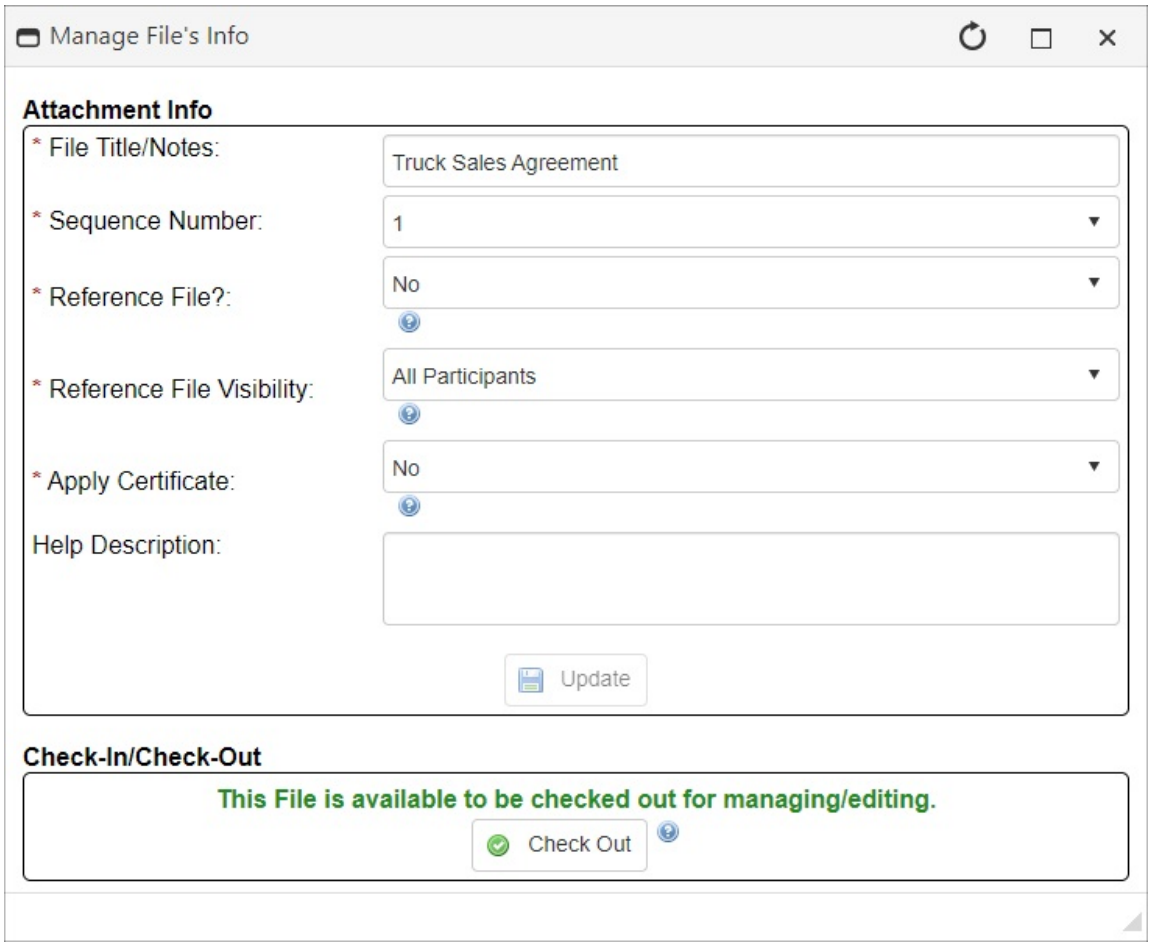


3. The Document Process Manager: Manage Files/Attachment page displays. Click **Manage** for the document.

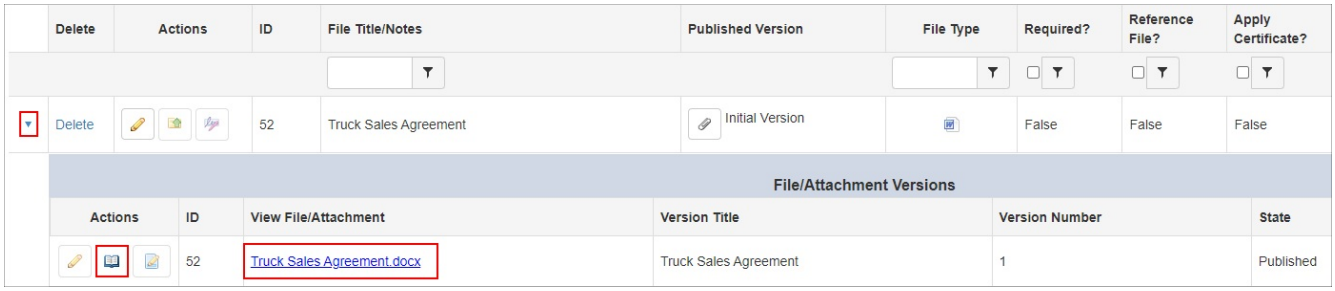


4. A pop-up window displays. Click Check Out.

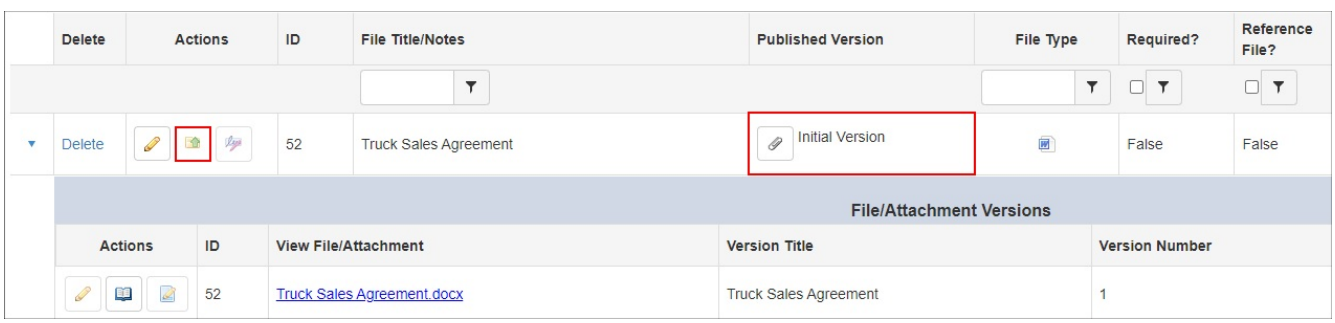
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5. The pop-up window closes. Click the carat.



6. Preview or download the document. If downloading, make any changes necessary and click Upload to upload the updated document version.



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7. Click **Attach**. A pop-up window displays. Click OK and close the pop-up.

8. Click Manage. A pop-up window displays. Click **Check In**.

9. On the side menu, click **Return to Record Details**.

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E-Approval Flow/Groups- Document Generation

E-Approval Flow/Groups - Document Generation

E-Approval - Document Generation: Flow/Groups

The next screen is where authorized users are able to manage the **E-Approval Process** and its participants that have already been defined on the template side. Authorized Users can add new participants to the already-defined E-Approval Flow Steps and/or edit the participants who had previously been assigned.



From this page, users can perform the following actions:

1. **Add Participant:** Authorized Users are able to add a participant to a flow step that has already been created. Users cannot create or add a new flow step to a generated Document Package; however, they are able to assign additional employees, roles & groups or client/vendor contacts as participants in one.

2. **Set Participant**: Authorized users are able to set a new or change a participant for a flow stop. Participants that can be assigned include individual employees, roles & groups, and client/vendor contacts.

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E-Approvals Processing

E-Approvals Processing

E-Approvals - Document Generation: Processing

The next screen under the **E-Approvals** section is where authorized users will be able to create and manage new E-Approval Processes for the generated **Document Package** that were defined on the previous step. From this page, users can perform the following actions:

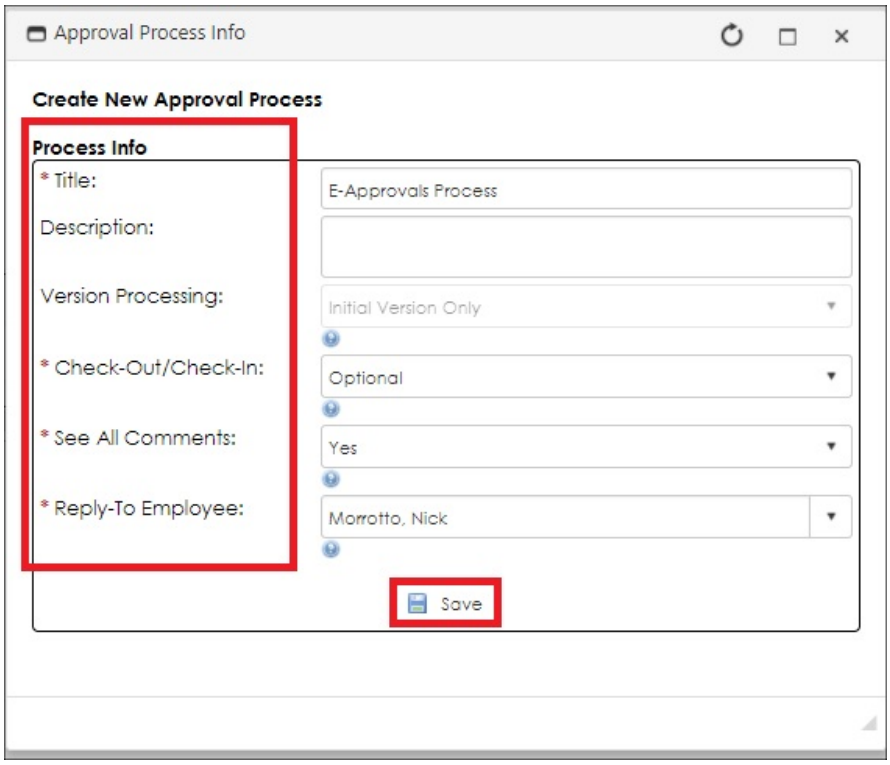
1. **Add New Approval Process**



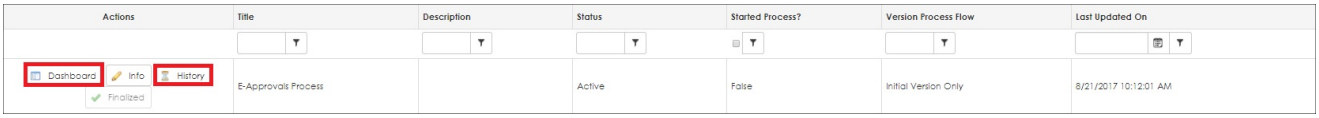
Authorized Users can add/setup a current Approval Process by clicking **New Approval Process**. After the Approval Process has been added, the **Info** contains the same information that is getting keyed in. Users will be prompted with the following fields:

Title: Title of the entire Approval Process
Description: General description of the Approval Process
Version Processing: Choice between the Initial Version Process or Additional Versions Process
Checked-Out Downloading: Allowing/Not allowing participants to check-out documents when editing
See All Comments: Ability for participants to see all comments throughout the process
Reply-To Employee: E-mail address that will be used as the reply-to for all E-mail notifications

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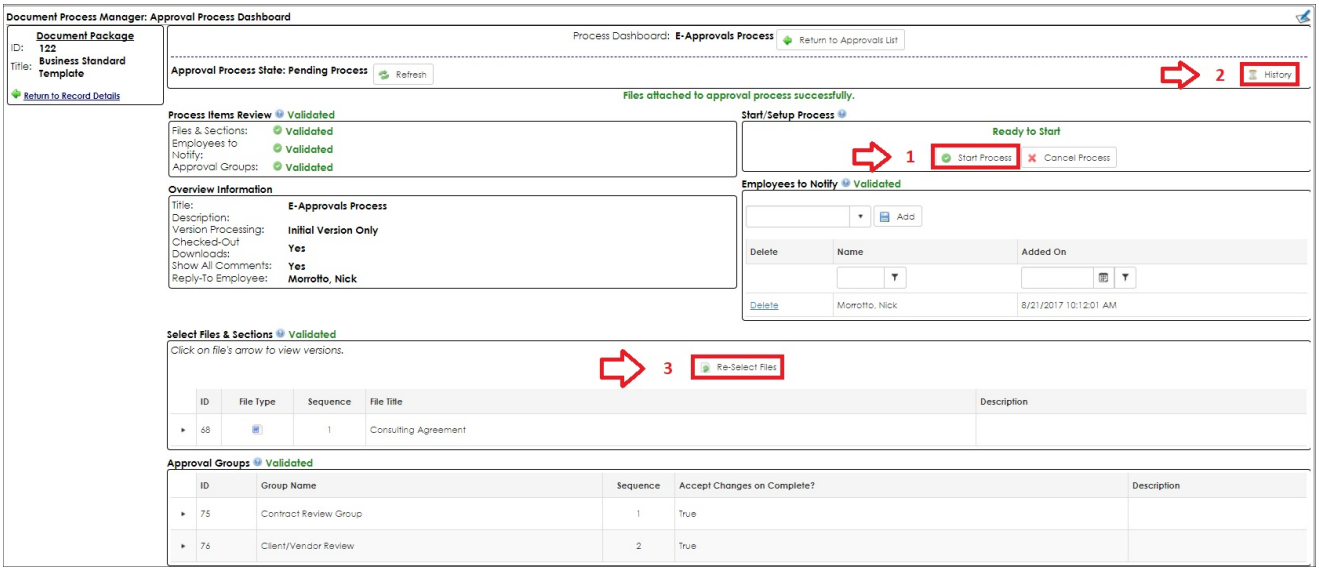


2. **View History**: A full audit log or history for the Approval Process that is currently being managed. Audit logs include the **Logged Action**, **Logged For** (Employee Name), and **Logged On** (Date & Time) information.



3. **Dashboard**

The Dashboard is essentially the Home Page for any E-Approval Process that an authorized user wishes to start and/or manage/monitor. The Dashboard provides a central hub for authorized users where they can start/cancel an E-Approval Process, monitor progress and assign additional employees as Reply-To.



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From this screen, users can perform the following actions:

1. **Start Process**: When the user is ready to begin the E-Approval Process, simply click **Start Process** and the system automatically sends out notifications to the assigned participants inviting them to review and E-Approve the Document Package.

If any of the sections on this Dashboard are not marked as Validated with a check-mark, the system does not allow users to start a process. This means that the user is missing essential information or missed a step in setting up the generated Document Package and E-Approval Process. The section that is missing something is marked, so users can retrace their step back to the proper section and rectify the issue. Think of it like a traffic light: red means Stop, and green means Go.

2. **View History**: A full audit log of the E-Approval Process that has been selected and started. The audit log includes **Logged Action**, **Logged For** (Employee), and **Logged On** (Date & Time) information.

3. **Re-select Files**: Authorized users can specify the files and/or content sections that will be used for the Approval Process.

Note: Only published versions are available.

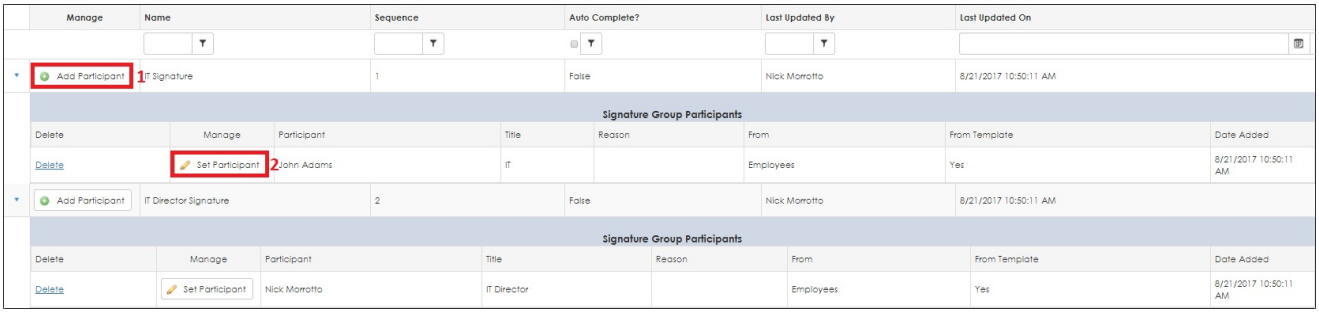
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E-Signature Flow/Groups- Document Generation

E-Signature Flow/Groups - Document Generation

E-Signature - Document Generation: Flow/Groups

The next screen falls under the **E-Signature** section on the menu and allows authorized users to set and/or add participants to **E-Signature Processes** that were defined on the template side.



From this screen, users can perform the following actions:

1. **Add Participant**: Authorized users can add participants to an E-Signature Process Step that has already been created. Participants can be individual internal users, roles & groups and/or client/vendor contacts.

Users cannot create new E-Signature Process Step on a generated Document Package. That is handled on the template side.

2. **Set Participant**: Authorized users can alter or set participants to an already existing E-Signature Process Step. Participants can be individual internal users, roles & groups and/or client/vendor contacts.

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Creating a New Third Party Paper Template

Creating a New Third Party Paper Template

E-Signature - Document Generation: New Third-Party Templates

Third-party templates operate in a similar fashion to other templates. They are useful for documents that do not require having data merged onto them but do require signature.

Once created, the template can be processed like any other for E-Signature Processing. Visit the E-Signature Processing wiki page for more details.

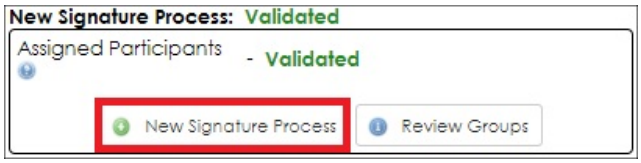
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E- Signature Processing

Signature Processing

E-Signature - Document Generation: Processing

The next screen under the **E-Signature** section is where authorized users are able to create and manage new **E-Signature Processes** for the generated **Document Package** that were defined on the previous step.



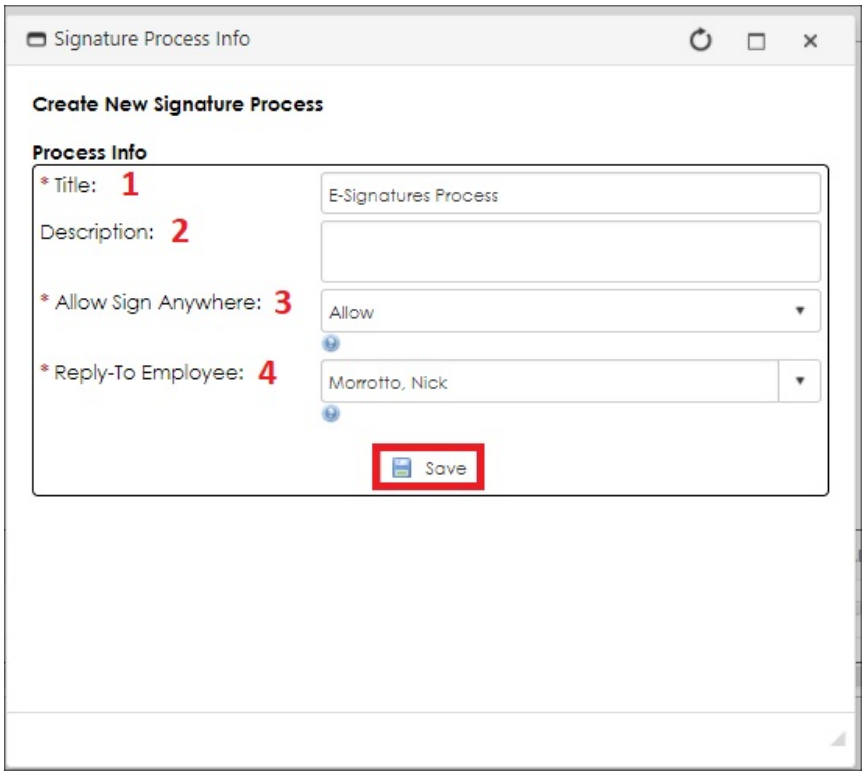
From this page, users can perform the following actions:

1. New Signature Process

Authorized Users can add/setup a current E-Signature Process by clicking **New Signature Process**. After the E-Signature Process has been added, **Info** contains the same information that is getting keyed in. Users are prompted with the following fields:

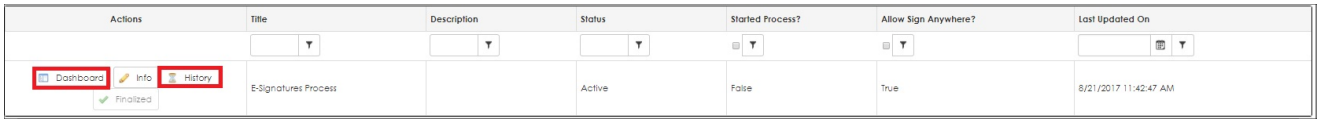
1. **Title:** Name of the E-Signature Process
2. **Description:** General description of the E-Signature Process
3. **Allow Sign Anywhere:** Controls if signers can sign anywhere on the document or in a specified area only
4. **Reply-To Employee:** E-mail address used as the reply-to for all E-mail notifications

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2. View History

A full audit log or history for the E-Signature Process that is currently being managed. Audit logs include the **Logged Action**, **Logged For** (Employee Name), and **Logged On** (Date & Time) information.



3. Dashboard

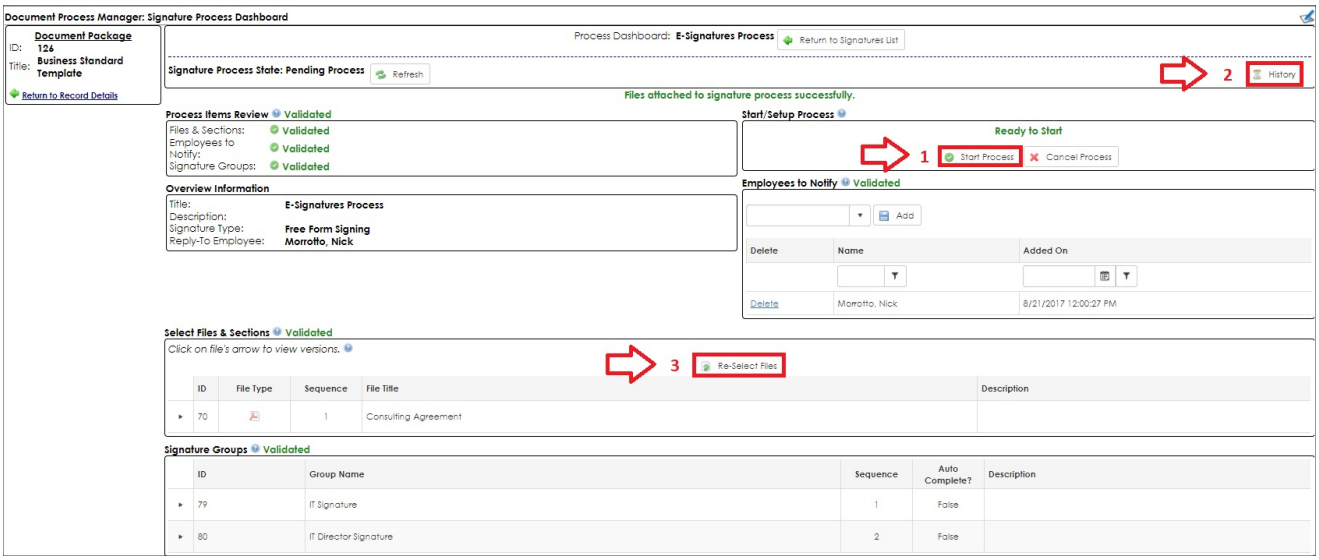
The Dashboard is essentially the Home Page for any E-Signature Process that an authorized user wishes to start and/or manage/monitor. The Dashboard provides a central hub for authorized users where they can start/cancel an E-Signature Process, monitor progress, and assign additional employees as Reply-To.

From the dashboard, users can perform the following actions:

1. **Start Process**: When the user is ready to begin the E-Signature Process, simply click **Start Process** and the system will automatically send out notifications to the assigned participants inviting them to E-Sign the Document Package.

If any of the sections on this Dashboard are not marked as Validated with a check-mark, the system does not allow users to start a process. This means that the user is missing essential information or missed a step in setting up the generated Document Package and E-Signature Process. The section missing something is marked, so users can retrace their steps back to the proper section and rectify the issue. Think of it like a traffic light: red means Stop and green means Go.

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2. **View History**: Action, Logged For (Employee), and Logged On (Date & Time) information.

3. **Re-select Files**: Authorized users can specify the files and/or content sections that will be used for the E-Signature Process.

Note: Only published versions are available.

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Setting Signature Place Holders - E-Signatures

Setting Signature Place Holders - E-Signatures

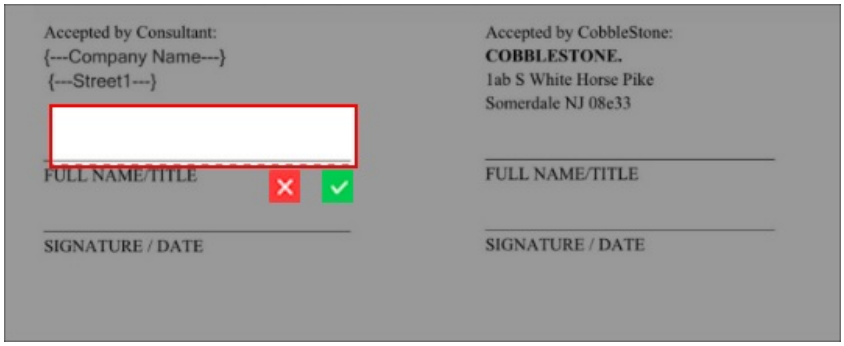
Setting Signature Place Holders

By clicking **Signatures**, the user is directed to the **Document Collaboration Gateway**.



Once in the gateway, navigate to the position on the document at which the place holders should be set. Use the top of the pointing finger to determine where the signature box is wanted.

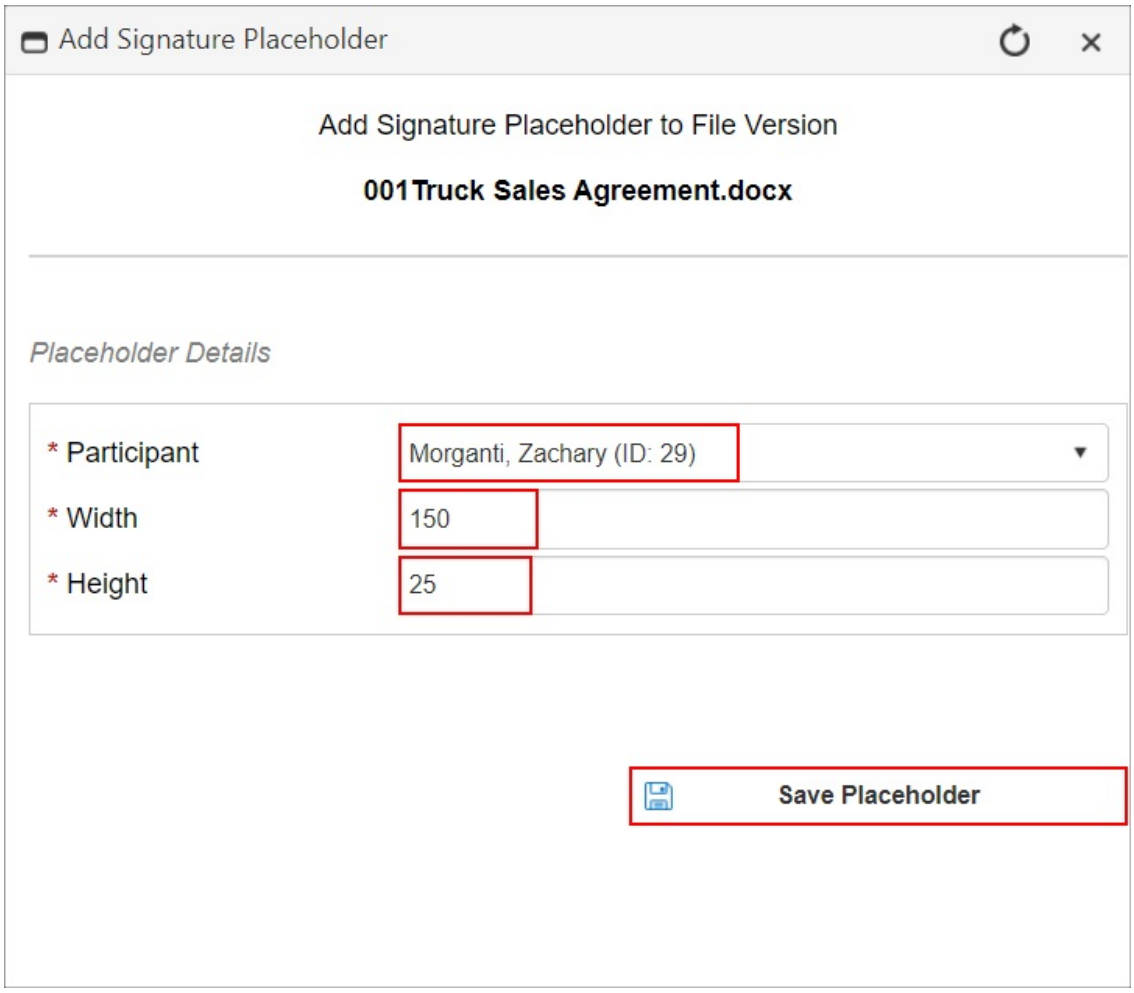
Once clicked, a pop-up window displays.



On this screen, the participant to use this placeholder is determined. Available signers are from the list of signers specified before the IntelliSign Process or E-Signature Process was started. Also, the width and height of the placeholder can be set.

Note: The recommended settings for the width and the height of the signature box is 150W x 25H.

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Once the placeholder is set, click **Return** to navigate to the dashboard and begin the signature process if all other criteria are completed.



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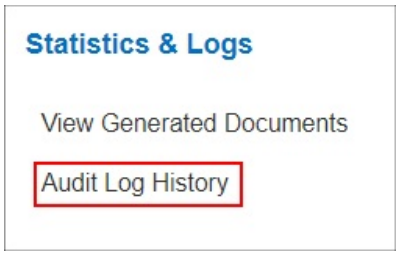
Audit Log History & Merged Content

Audit Log History & Merged Content

Audit Log History & Merged Content

The Audit Log History is a complete audit trail of the Document Package that tracks every action from creation to archival. The Audit Log History keeps the history for **Logged Action**, **Logged For** (Employee), and **Logged On** (Date & Time).

To view the audit log, click **Audit Log History** under the *Statistics & Logs* side menu.





Logged Action	Logged For	Logged On
Email(s) for Notification on Template Change attempted to send but failed.	[redacted]	8/4/2021 3:08:04 PM
Email could not be sent. Missing one of the following: To, Subject, Body, From Address, SMTP Server	[redacted]	8/4/2021 3:08:04 PM
Attached File: Truck Sales Agreement (ID:4) removed from template document package.	[redacted]	8/4/2021 3:08:04 PM
Email(s) for Notification on Template Change attempted to send but failed.	[redacted]	8/4/2021 3:07:59 PM
Email could not be sent. Missing one of the following: To, Subject, Body, From Address, SMTP Server	[redacted]	8/4/2021 3:07:59 PM

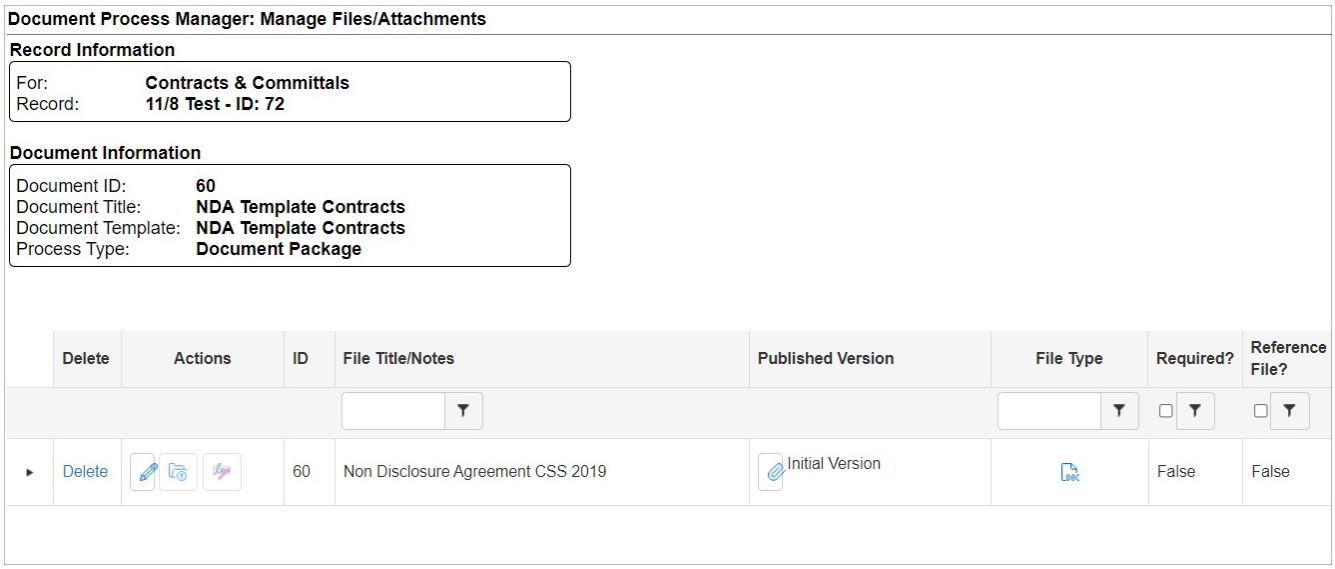
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Document Packages Without E-Approvals/Signatures

Document Packages Without E-Approvals/E-Signatures

Generated Document Packages without E-Approvals and E-Signatures

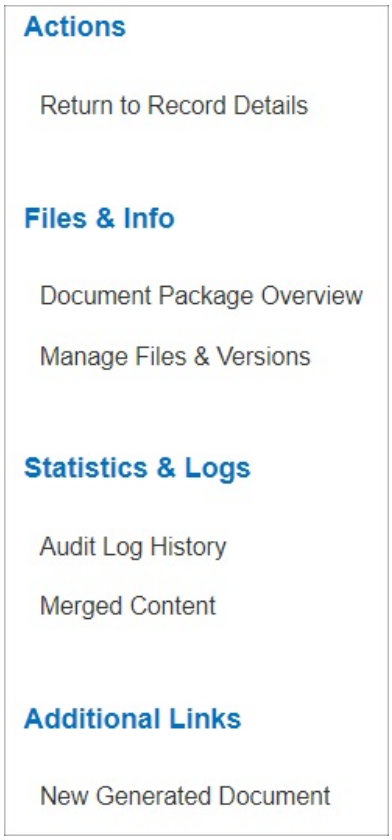
Document Packages generated from templates that do not have **E-Approvals** and **E-Signatures** enabled offer slightly different functionality that those with one or both enabled. When accessing a generated document package that has neither E-Approvals nor E-Signatures enabled, the following screen initially displays:



At first glance, this looks to be exactly the same as other generated document packages, however there are two (2) key differences.

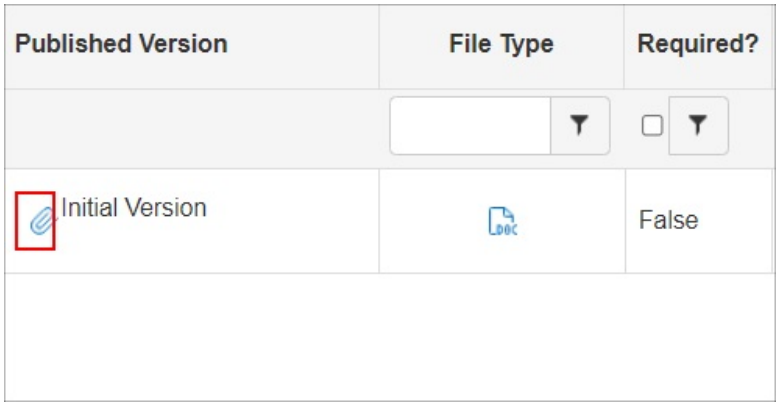
This first difference is that the options for **E-Approvals** and **E-Signature**s on the side menu are not available.

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These links are hidden for this generated document package because it came from a template that does not allow for (did not enable) **E-Approvals** and **E-Signatures**.

The second difference deals with an additional option available for each file in the grid/table:

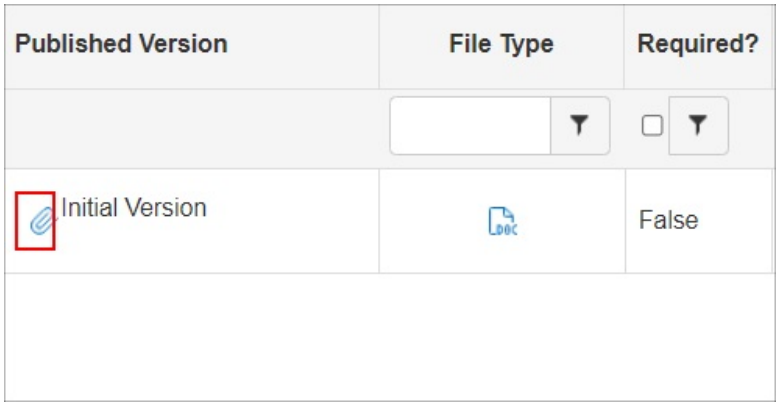


This new item is **Attach** which is used to attach the published version of the specified file to the record with which the generated document package is associated (e.g.: the Contract Record).
Initially, **Attach** is grayed out for every file (this means the option is disabled). It is disabled is because the **Checked Out By** column does not show that the file is checked out to the user. To manage/work with one of the files, it must be checked out.

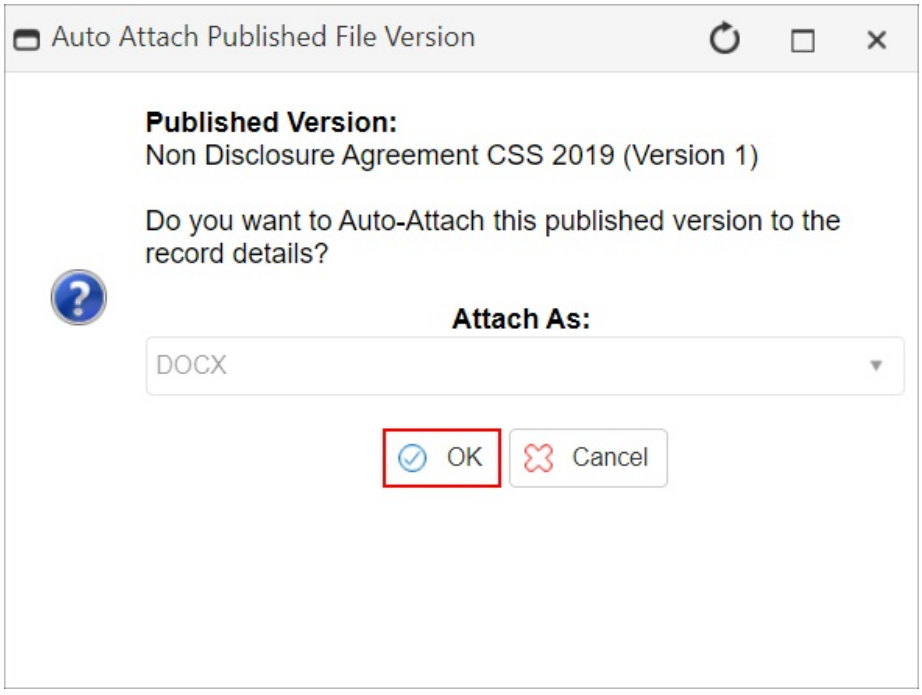
Note: To check out a file, click **Manage** for the file and click **Check Out** from the pop-up window.

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Once a file is checked out to the user, **Attach** is enabled for use.



To attach the published version of the file to the associated record, click **Attach**.



Click **OK** to attach the published version of the file to the record. **Cancel** closes the window without doing anything.

In addition to the standard buttons, the window also features **Attach As**. This drop-down box is disabled when auto-attaching all file types (defaulted to the type of file it is) except for auto-attaching CobbleStone Document Builder files (.cdbs). When auto-attaching this specific file type, the user be prompted to indicate the type of file to attach the Document Builder file as. The available options are: Word Document (.doc & .docx) and PDF (.pdf).

Auto-attaching a file from the generated document package to the associated record allows for the use of external processing of approvals and/or signatures that your organization may utilize. This includes using CobbleStone's optional integration with DocuSign and/or Adobe Sign.

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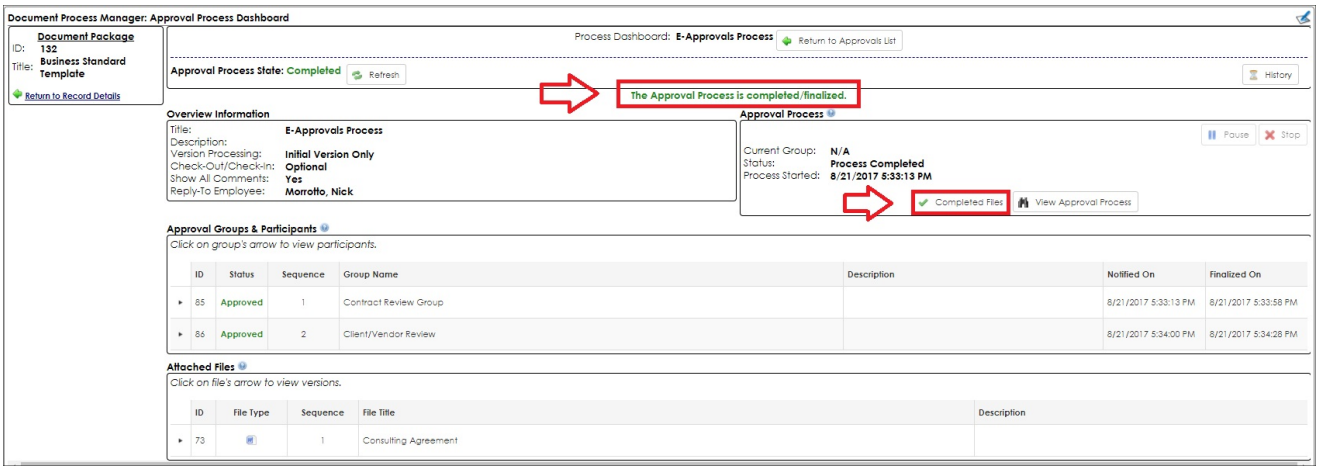
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Completed Approval Processes

Completed Approval Processes

Completed E-Approval Process

When an Approvals Process has been fully completed, the dashboard will look similar to this:



A completed approval process can now only be viewed, however an additional button, **Completed Files**, is available within the **Approval Process**.

By clicking **Completed Files**, a pop-up window appears showing the fully approved version of each file associated with the approval process.



Each of these files can be downloaded by the **File's Final Version** name or directly auto-attached to the primary record by clicking **Auto Attach**.

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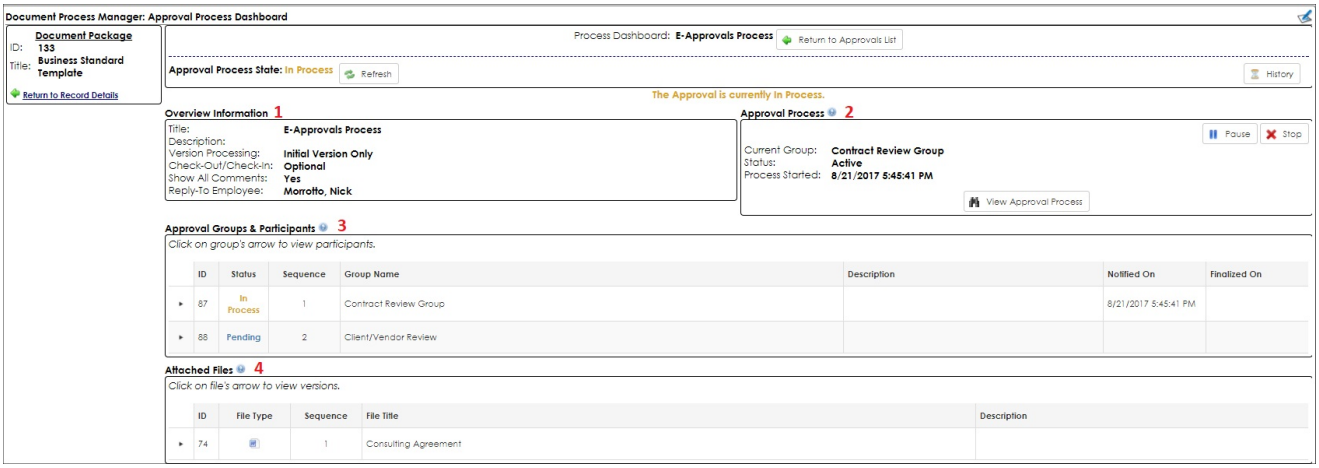
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Managing Electronic Approval Groups, Participants & Attachments

Managing Electronic Approval Groups, Participants & Attachments

Manage Electronic Approvals Process

Managing an electronic approvals process can all be done from within the Approval Dashboard page. When an approval process is created and started, the following screen is accessible:



This dashboard page provides all the pertinent or necessary information about the approvals process. There are four (4) areas to this page:

1. **Overview Information**
2. **Approval Process Status**
3. **Approval Groups & Participants**
4. **Attached Files**

1. Overview Information

Overview Information shows the high-level information about the approvals process such as the **title**, **description**, and **version processing**. All of this information can be managed by managing the approvals process information.

2. Approval Process Status

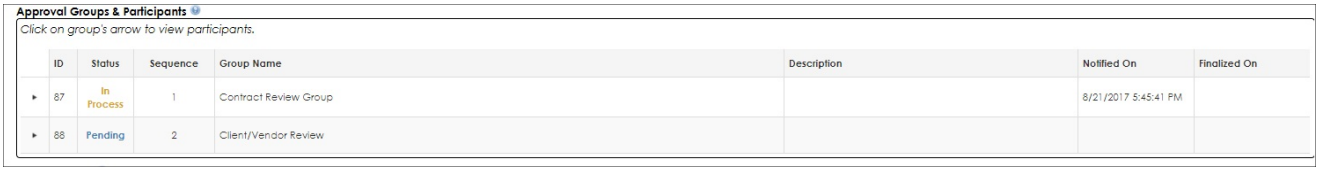
This area shows a quick view of when the process was started, its status, and which group/step it is currently on. In addition, this area is where a user that has permission to can **pause** and/or **stop** (cancel) the approval process. By performing either of these actions, e-mails is sent out to all participants of the process.

The other action that can be performed in this area is a direct link to take the user to the **Document Collaboration Gateway** for this approval process. The user accesses the approval process in a View-Only mode, meaning they see everything that the participant(s) see when accessing the approval process but perform any actions.

3. Approval Groups & Participants

The **Approval Groups and Participants** area shows a complete breakdown of where the process is currently.

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This grid has two (2) layers to it. The primary layer shows all of the approval groups (in order of their sequence), while the sub/details layer for each group shows its participants.

Approval Groups

The primary layer shows each of the **approval groups** (in order of their sequence). In addition, each group shows the date on which it was notified (if not yet notified, the date is blank) as well as the date on which it was finalized (if not yet finalized, the date is blank).

Note: For a group to be finalized, all of the group's participants have to **complete/approve**.

The other key piece of information is the **status**. This will show the current status of each approval group. Statuses are color coded and broken down as such:

Approved: All participants in the group completed their approvals.

Rejected: At least one participant in the group rejected the approval process (this will end the process).

In Process: This is the current/active approval group in the process.

Pending: A group the process has not yet reached.

Voided: Any group not approved gets set to this status if the process is cancelled by the employees/users managing the process.

Participants:

The sub/details layer of this grid shows each participant for the given approval group. Each participant's row shows the date on which they were notified (if not yet notified, the date is blank) and the date on which they were finalized (if not yet finalized, the date is blank).

Note: For a participant to be finalized, they will need to **approve** each file associated with the approval process and then **complete** their action.

The other key piece of information is the **status**. This will show the current status of each participant. Statuses are color coded and broken down as such:

Approved: The participant has approved each file and completed their part of the process.

Rejected: This participant rejected the approval process.

In Process: This participant has been notified and is currently in the process of reviewing and approving.

Pending: A participant the process has not yet reached.

Optional: This participant is and optional participant. Optional participants will only be included if a new version of any of the files is uploaded by another participant in their group. These optional participants do not get e-mail notifications to join the process unless this occurs.

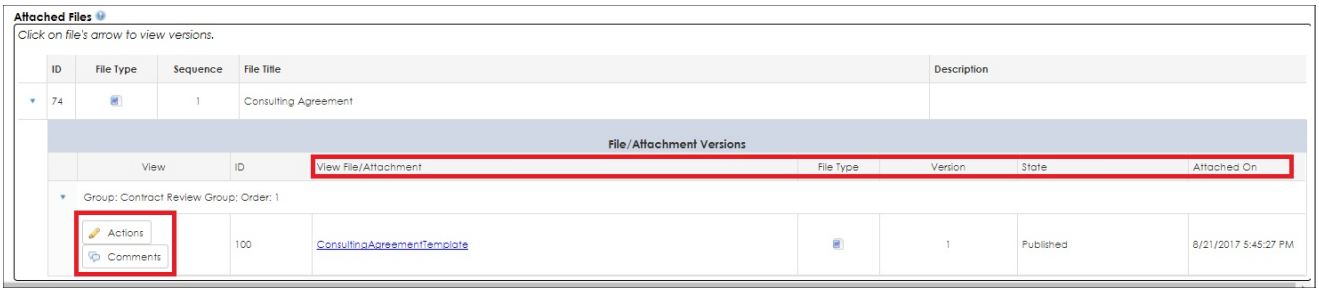
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Ignored: An optional participant that was not needed to be a part of the process.

Voided: Any participant not approved gets set to this status if the process is cancelled by the employees/users managing the process.

4. Attached Files

The **Attached Files** area shows a complete breakdown of every file out for approvals, all versions for each file, and when/by whom they were uploaded.



This grid has two (2) layers to it. The primary layer shows all of the files associated with the process (in order of their sequence), while the sub/details layer for each file shows all of its versions.

Associated Files

The primary layer shows each of the files associated with the process (in order of their sequence). In addition, each file shows what type of file it is and any additional description.

File/Attachment Versions

The sub/details layer of this grid shows each version for the given file/attachment. Versions are broken down into the approval group for which they are applicable. (Which group it was that uploaded, viewed, or worked with that version). A version is only applicable for one (1) approval group within the approval process.

Each version will show the following information:

File Type: What type of file the version is.

Version: The Version's number.

State: the state of that version.

- **Published** means the current published version being approved by the group.
- **Archived** means a prior uploaded version.

Attached On: The date the version was attached/uploaded

In addition to this information, each version has two buttons associated with it (Actions & Comments). **Actions** shows a pop-up window of the actions taken by participants on this version (such as initial upload and approving of). **Comments** shows a pop-up window of all additional comments posted by participants for this file's version.

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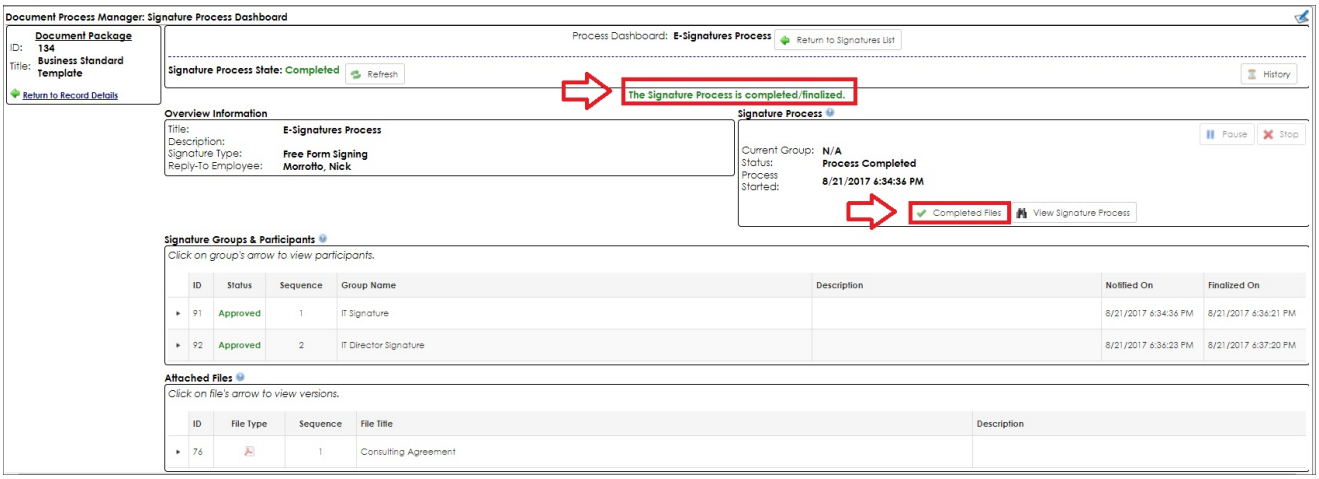
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Completed Signature Processes

Completed Signature Processes

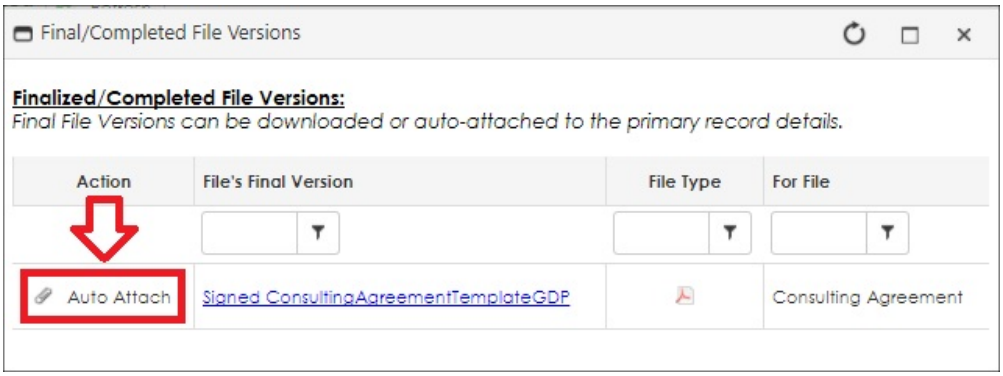
Completed E-Signature Process

When a Signature Process has been fully completed, the dashboard will look to the one pictured below.



A completed signature process can now only be viewed, however there is an additional button, **Completed Files**, available from within the dashboard area **Signature Process**.

By clicking **Completed Files**, a pop-up window appears showing the fully signed version of each file associated with the signature process.



Each of these files can either be downloaded by clicking on their name or can be directly auto-attached back onto the primary record's file attachments by clicking **Auto Attach**.

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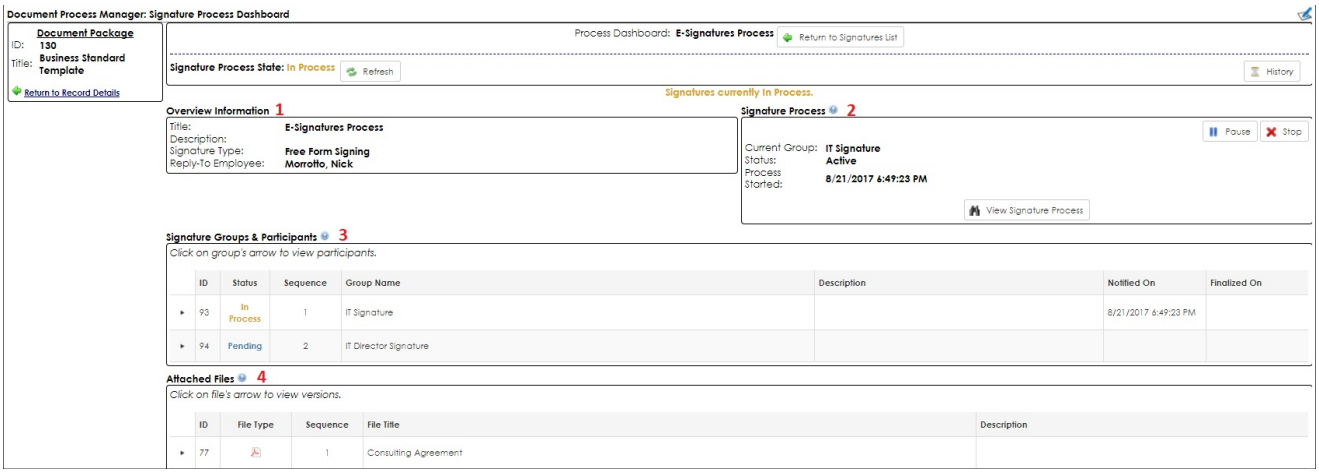
Managing Electronic Signature Groups, Participants & Attachments

Managing Electronic Signature Groups, Participants & Attachments

Manage Electronic Signatures Process

Managing an electronic signature process can all be done from within the **Signature Dashboard** page. When a signature process is initiated, the following screen is accessible:

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This dashboard page provides all the pertinent or necessary information about the signature process. There are four (4) areas to this page:

1. **Overview Information**
2. **Signature Process Status**
3. **Signature Groups & Participants**
4. **Attached Files**

1. Overview Information

The overview information shows the high-level information about the signature process such as the title, description, and signature type. All of this information can be managed by managing the signature process information.

2. Signature Process Status

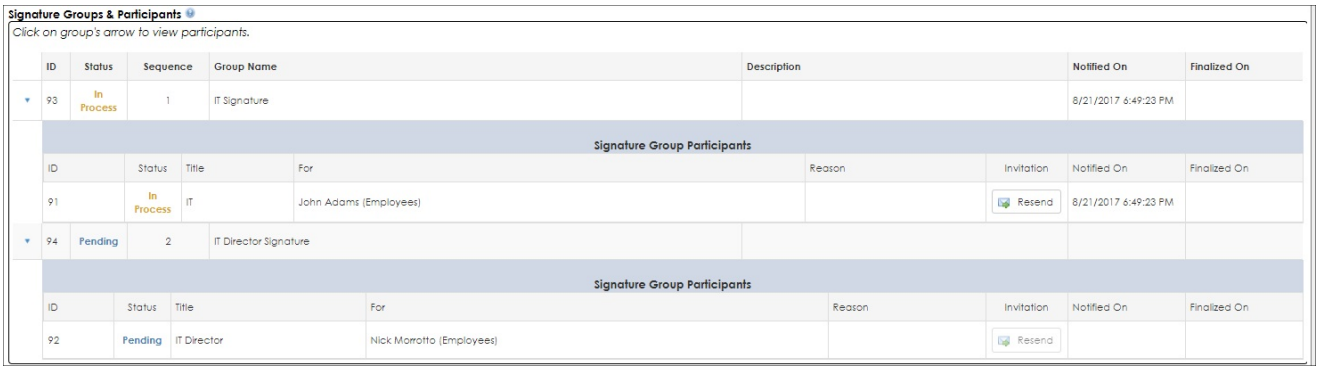
This area will show a quick view of when the process was started, its status and what group/step it is currently on. In addition, this area is where a user that has the appropriate permissions can pause and/or stop (cancel) the signature process. By performing either of these actions, e-mails will be sent out to all participants of the process.

The other action that can be performed in this area is a direct link to take the user out to the **Document Collaboration Gateway** for this signature process to view the signature process in a View-Only mode, meaning the user will see everything that the participant(s) see when they access the signature process; however, they cannot perform any actions.

3. Signature Groups & Participants

The Signature Groups and Participants area will show a complete breakdown of where the process is currently.

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This grid has two (2) layers to it. The primary layer will show all of the signature groups (in order of their sequence), while the sub/details layer for each group will show its participants.

Signature Groups

The primary layer shows each of the signature groups (in order of their sequence). In addition, each group will show the date that it was notified on (if not yet notified it will be blank) as well as the date that it was finalized on (if not yet finalized it will be blank).

Note: For a group to be finalized, all of the group's participants have to sign the document(s) and complete.

The other key piece of information is the status. It shows the current status of each signature group. Statuses are color coded and broken down as such:

Approved: All participants in the group completed their signatures.

Rejected: At least one participant in the group rejected the signature process (this will end the process).

In Process: This is the current/active signature group in the process.

Pending: A group the process has not yet reached.

Voided: Any group not fully approved (signed) gets set to this status if the process is cancelled by the employees/users managing the process.

Participants:

The sub/details layer of this grid shows each participant for the given signature group. Each participant's row shows the date on which each was notified (if not yet notified it will be blank) as well as the date on which they were finalized (if not yet finalized it will be blank).

Note: For a participant to be finalized, he or she needs to sign each file (or each file they are required to sign through placeholders) associated with the signature process and then **complete** the action.

The other key piece of information is the status. This shows the current status of each participant. Statuses are color coded and broken down as such:

Approved: The participant has signed each file (or signed where required) and completed their part of the process.

Rejected: This participant rejected the signature process.

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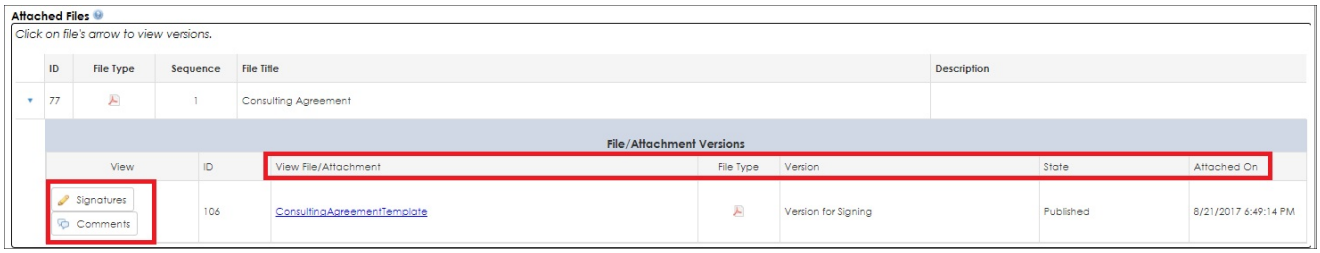
In Process: This participant has been notified and is currently in the process of reviewing and signing.

Pending: A participant the process has not yet reached.

Voided: Any participant not fully approved (signing completed) gets set to this status if the process is cancelled by the employees/users managing the process.

4. Attached Files

The Attached Files area shows a complete breakdown of every file out for signatures. Below is an image of the grid provided:



This grid has two (2) layers to it. The primary layer shows all of the files associated with the process (in order of their sequence), while the sub/details layer for each file shows information associated with the version sent out for signatures.

Associated Files

The primary layer shows each of the files associated with the process (in order of their sequence). In addition, each file shows what type of file it is and any additional description.

File/Attachment Version for Signing

The sub/details layer of this grid shows information associated with the version of the file/attachment sent out for signatures. Each file has one (1) version shown (this will be the published version of that file sent out for signatures from the participants).

The version shows the following information:

File Type: The type of the file

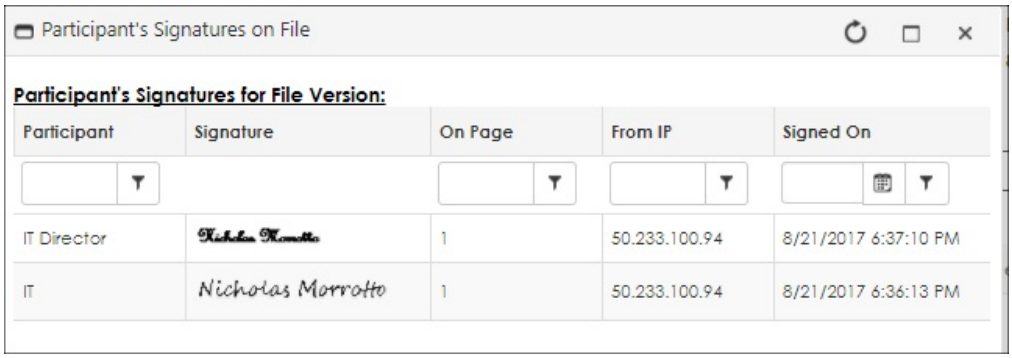
Version: The Version's number

State: The state of that version (This should always be published)

Attached On: The date the version was attached/uploaded

In addition to this information, the version has two buttons associated with it (**Signatures & Comments**). The signatures button shows a pop-up of the actual signatures from the participants. Below is a screenshot showing a sample of this pop-up window:

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The grid on this window shows each participant's name, their signature (as they signed it on the document/file), what page the signature is on, and when they signed there. In addition, the grid also tracks the IP Address from which the person signed (this is captured and tracked for monitoring and audit logging purposes).

Clicking **Comments** shows a pop-up window of all the additional comments posted by participants for this file's version.

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Data Aggregator Overview

Data Aggregator Overview

Data Aggregator Service: Overview

Experience intelligent national sanction compliance checks and risk analysis snapshots at a glance with CobbleStone's OFAC data feed integration!

About Data Aggregator

CobbleStone's OFAC (Office of Foreign Assets Control) data feed integration optional, add-on allows your organization to run checks on vendors against OFAC's Sanctions Lists.

The SDN (Specially Designated Nationals) list includes organizations and individuals that have been flagged under one or more of the US treasury's sanction programs and is critical for vendor/customer management and employee audit compliance.Contract Insight administrators can run scheduled, comprehensive OFAC checks and integrate them with record details pages for centralized vendor and company risk analysis consumption.

What can you do?

- configure which available areas within the software they want to be checked.
- determine whether to include searches for Also Known As (AKA) entries that check for possible aliases or other names for companies and vendors within the OFAC database.
- customize what is considered a match between company/vendor data and OFAC data based upon a set percentage (for example, a similarity percentage of 70% or more is considered a match).

Aggregation Integration and a Consolidated System

Contract Insight offers an initial and ongoing scheduled check for selected company and employee records so you can remain aware with consistent vendor/customer and employee audits! Furthermore, a link on a record page can be hovered over to present an eye-catching graph that maps the percentage of data matched between OFAC and Contract Insight.

Integrate Contract Insight with OFAC data for improved visibility of vendor, customer, partner, and employee compliance data and risk analysis.

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Configure the Integration

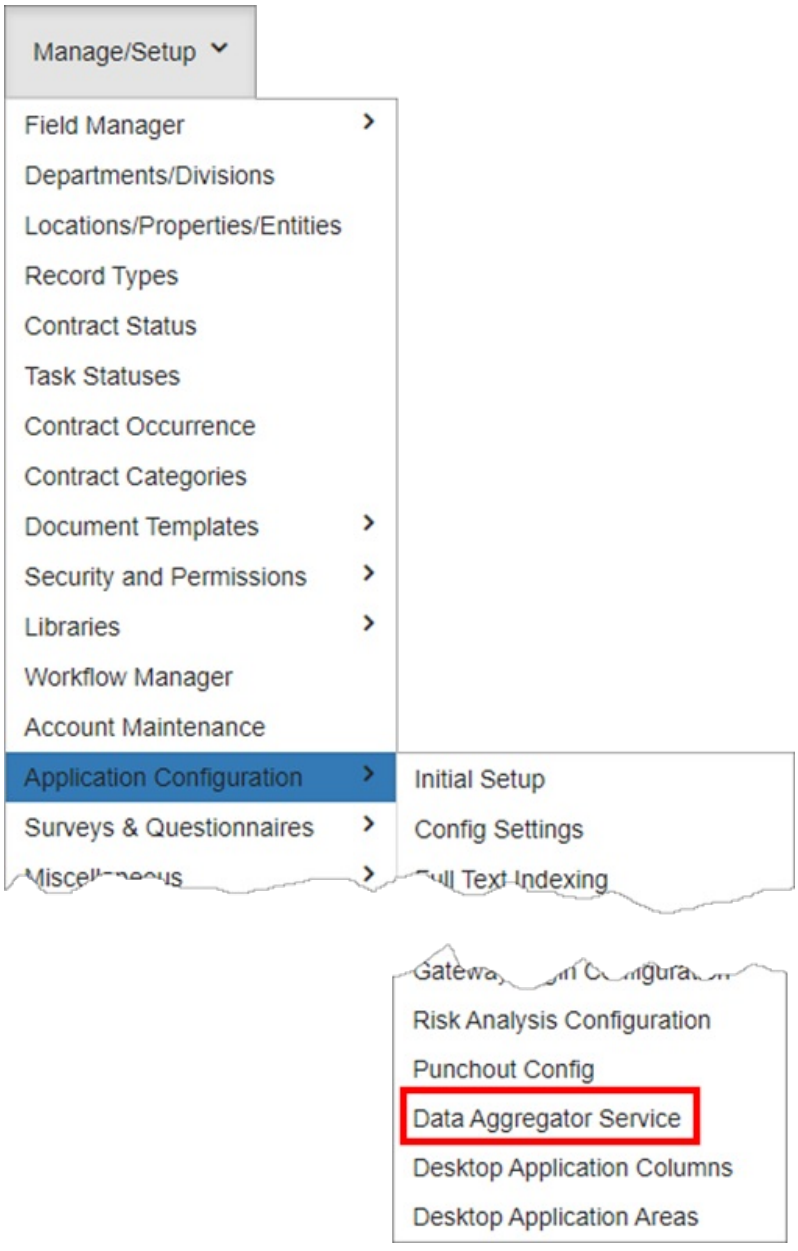
Configure the Integration

Data Aggregator Service: Configuration

Once licensed, configuration of the Data Aggregation Service/OFAC Integration is straight forward.

The Configuration Page

To access the Data Aggregation Service configuration area,via the top menu, navigate to **Manage/Setup - Application Configuration - Data Aggregator Service**.



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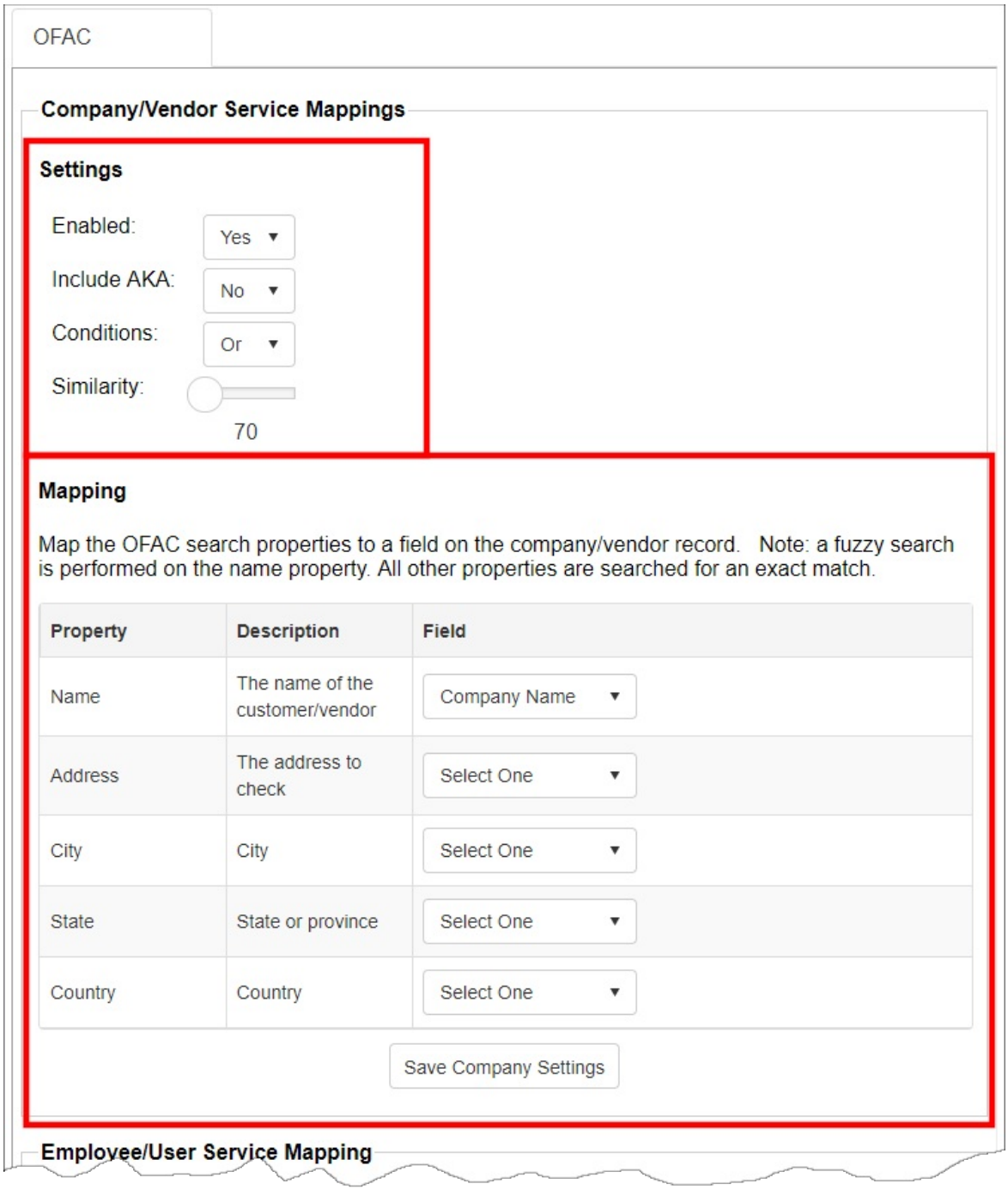
2. If setting up the aggregator service for the first time, a login prompt displays. Enter your credentials for the service. When done, click **Authorize**.



3. The **Configuration Management: Data Aggregator Service** page displays. On the service's tab, numerous options are available. For ease of use, they are broken into multiple areas:

A. **Company/Service Vendor Mapping**

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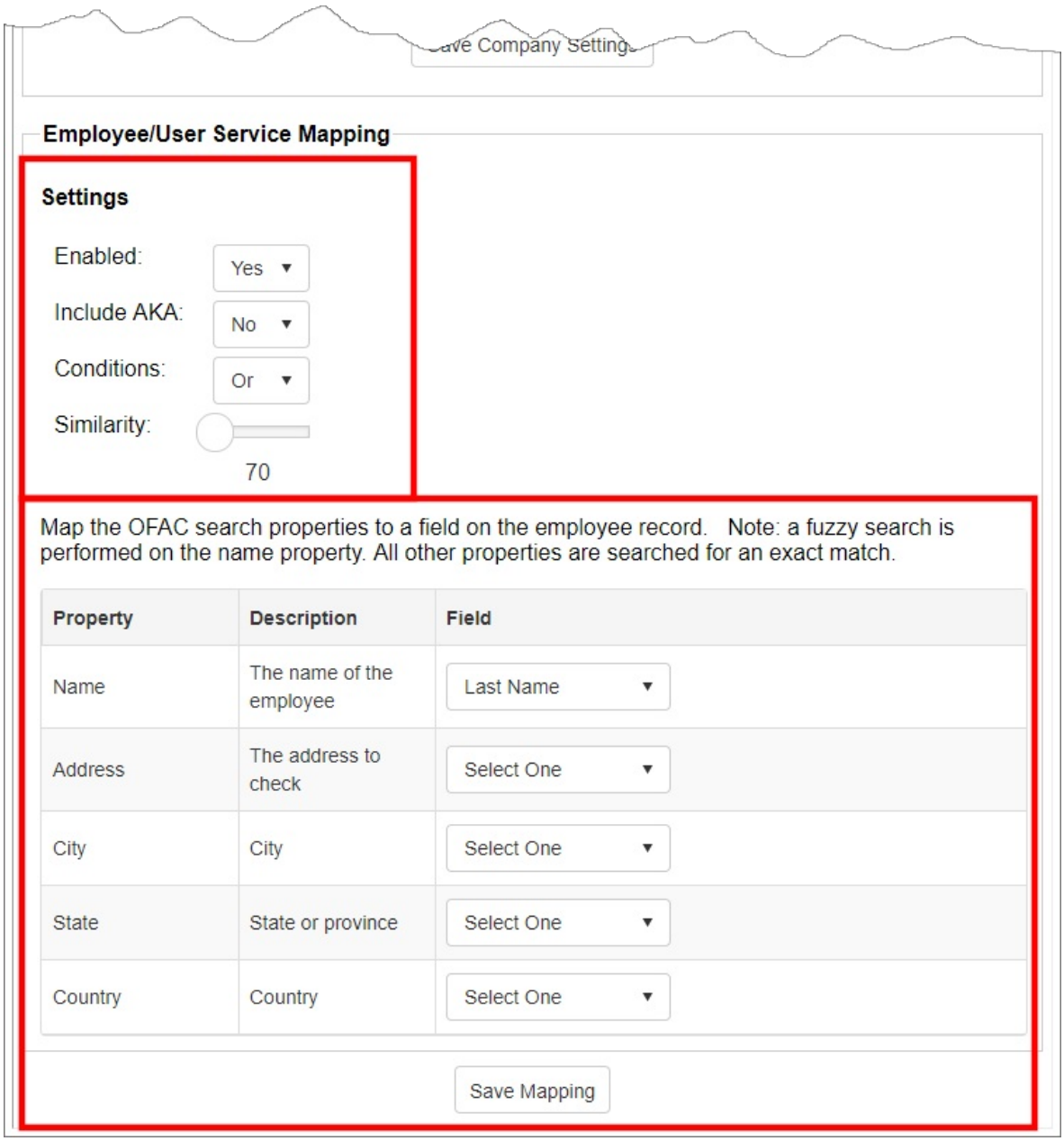


In this area, establish the general settings for the integration and indicate the fields in CobbleStone the data is checked against.

Click **Save Company Settings** when done with this area.

B. **Employee/User Service Mapping**

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In this area, establish the general settings for the integration and indicate the fields in CobbleStone the data is checked against.

Click **Save Mapping** when done.

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Reading Results

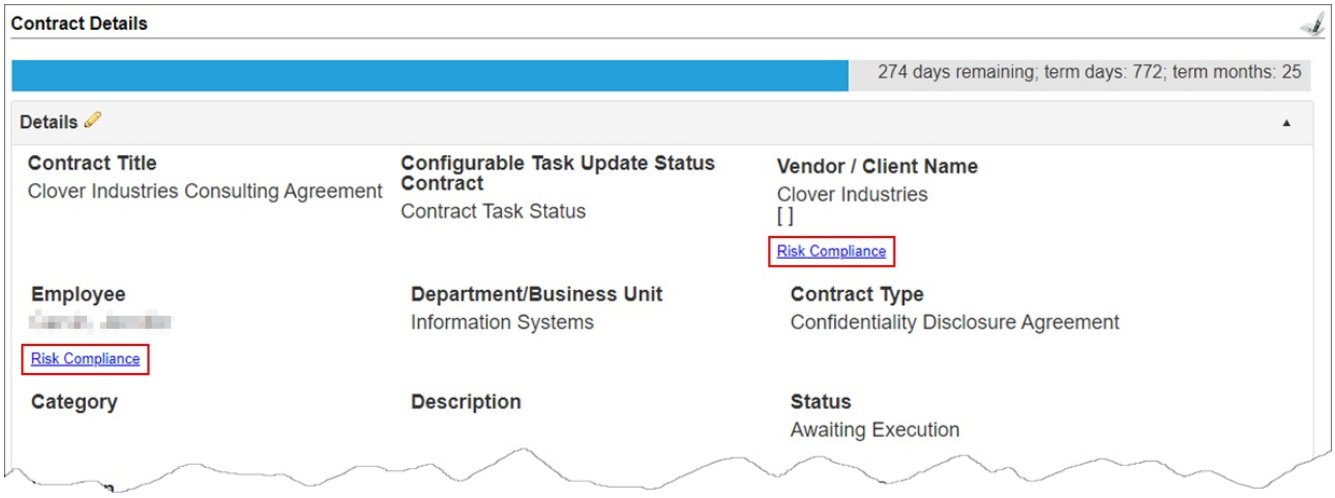
Reading Results

Data Aggregator Service: Reading Results

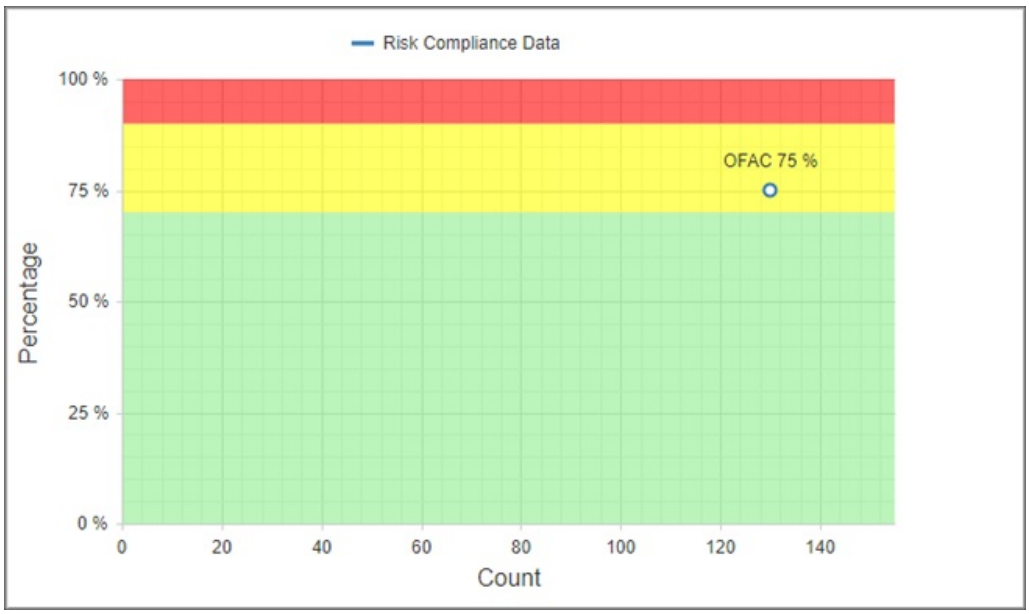
Once configured, results from OFAC can be read on the record itself. For the example below, we shall be reviewing a contract, but the data can be obtained on its applicable record type.

The Record's Details Page

When accessing a record, links to Risk Compliance are available.

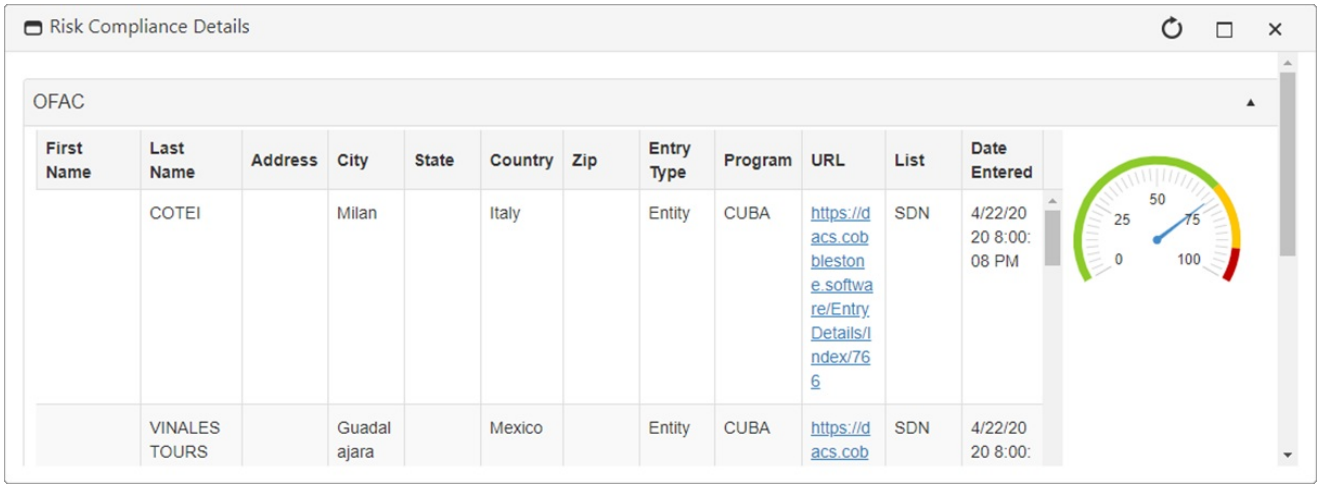


Hold your mouse over the Risk Compliance like to view a pop-up with a broad view of the risk. It displays the number of possible hits and the percentage of matched data.



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Click the link to review the individual line items to evaluate the rough rating.



The example results above are based on a 70% match - as defined in the configuration area.

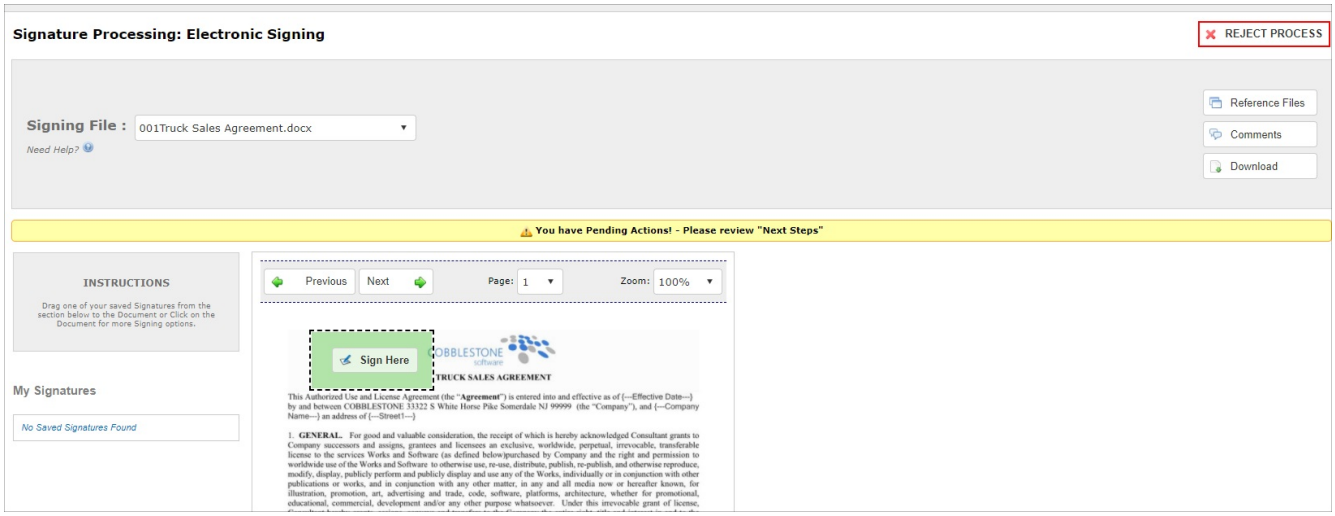
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Signing Documents - E-Signatures

Signing Documents - E-Signatures

Document Collaboration Gateway E-Approvals & E-Signatures: Signing Documents

Once the link to the Document Collaboration Portal is clicked, on the next screen, a participant can click **Reject Document(s)/Process** to cancel the entire process. Clicking this button rejects the entire signature process. The participant is first be asked to submit a reason why the process is being rejected. Anyone who has already taken action on the document will be alerted as well as the employee assigned to oversee the process. This button should only be used if the participant no longer wants the process to continue. If the process is rejected, a new process has to be started if necessary.



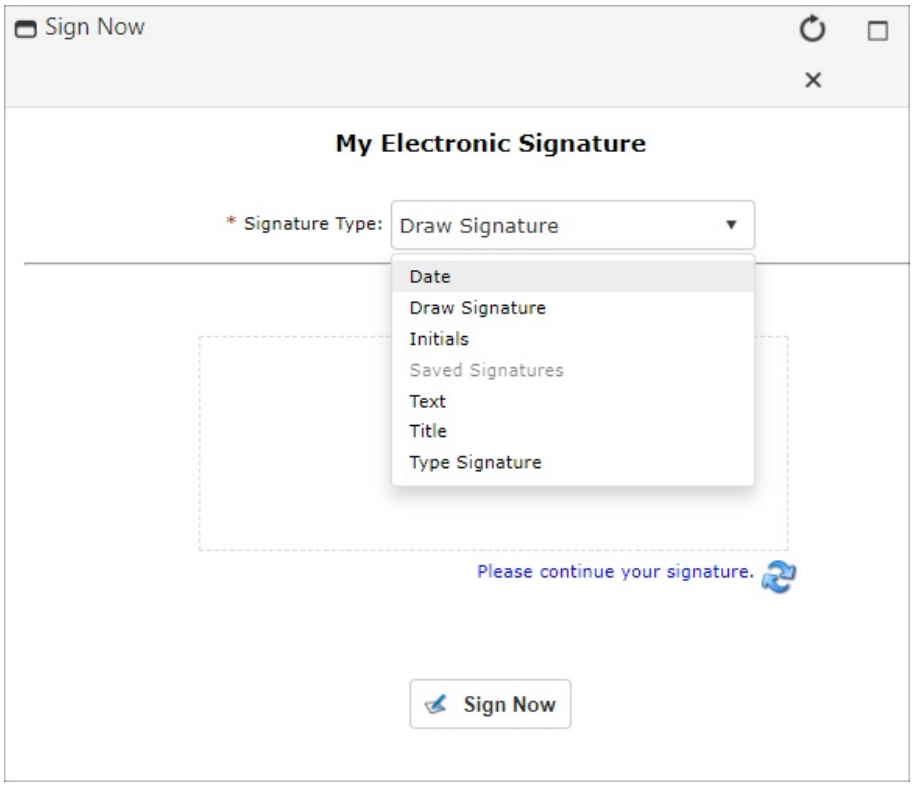
If **Allow Sign Anywhere** is enabled, the user gets to the screen below. There is no specified place for them to sign. They are able to reject the document/process on this screen.

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Once the participant clicks where he or she want to sign, that participant is prompted to sign the document. A participant can **Draw**, **Type**, or use a **saved signature** (if applicable).

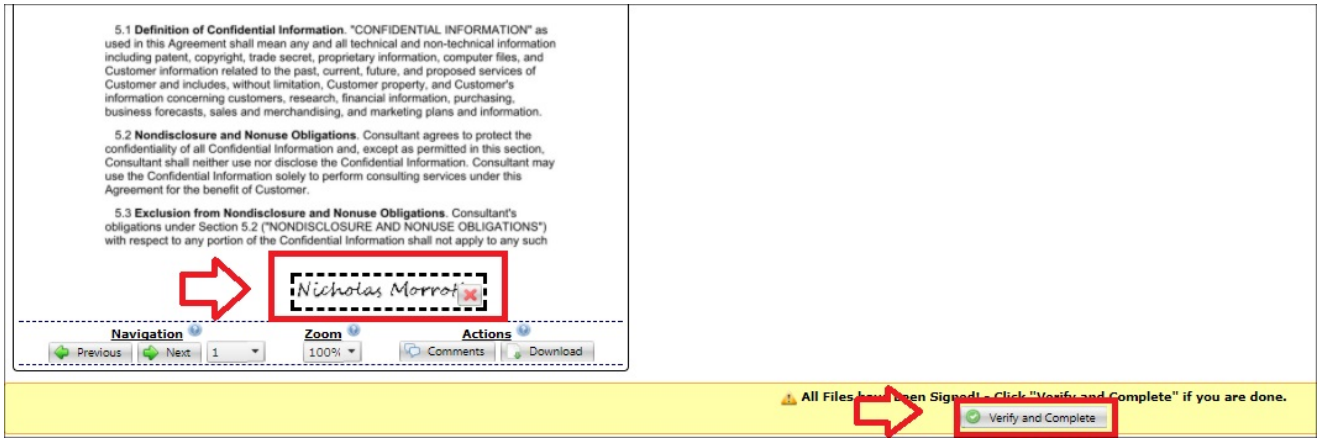
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Once the participant accepts their signature, it is applied to the document as specified.

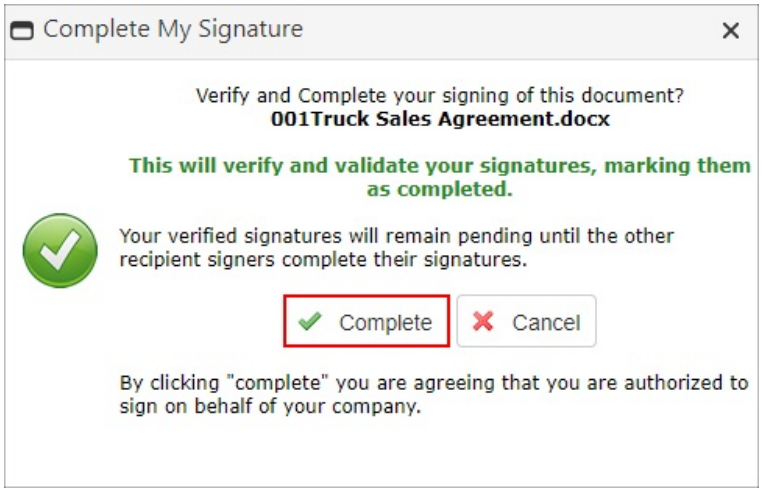


Once the document is signed, the participant can click **Verify and Complete** either in the top or bottom yellow bar.



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A pop-up window displays. The participant verifies the signing by clicking **Complete** to finish the process.

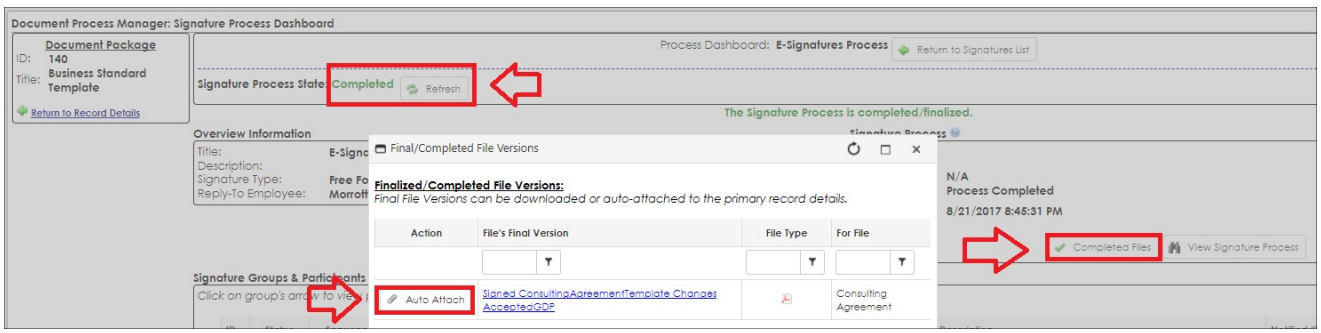


Once completed, the **Signature Processing** screen shows the status of the action required for the assigned participant.



Once the entire process is complete, the user who began the process can see if the process has been completed in its entirety. Any participants are able to download a copy of the signed document from this screen by clicking **Download**.

After the process is complete, on the dashboard for the process, the user assigned to it is able to take further action. By clicking **Completed Files**, the pop-up window gives the user the option to attach the signed document to the record. The file is saved under the **Files/Attachments** section of the record.



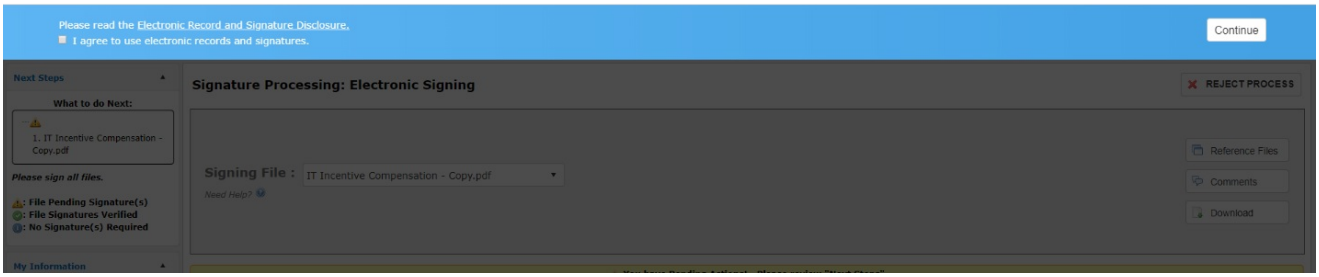
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External eSigning

As an alternative to CobbleStone's signing gateway, the External eSign is available for license. The External eSign Manager can connect to Adobe Sign or DocuSign. If connecting to DocuSign, CobbleStone's connector works with OAuth for clients utilizing a single sign-on system.

Prompt Before Signing / Approving

This is a new feature to CobbleStone that enables companies to add their own Terms and Conditions, which the Signer must accept before they can sign the document. The Admin of the system can Enable or disable this feature, as well as edit the Terms and Conditions section. Only once the signer accepts the Terms and conditions, will they be allowed to sign the document. The system will log the date and time when the Signer accepted the Terms and conditions. If the Signer had previously opened the same document and agreed to the Terms and Conditions, they will not be asked to accept the Terms and Conditions again for that document as the signer already accepted it previously.



CONFIGURATION

Admins may choose to Disable / Enable this feature in their system. To do so, go to :

Manage Setup > Application Configuration > Config Settings

In the drop down box to select Configuration Group, choose Document Authoring.

You'll see 2 App Config settings associated with this feature :

1) **Terms and Conditions**: Enabling this will make the Signer first agree to the Terms and Conditions before he / she can sign the document.

2) **Terms and Conditions Content**: The Terms and Conditions content to show the Signer.

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Types of Authentication

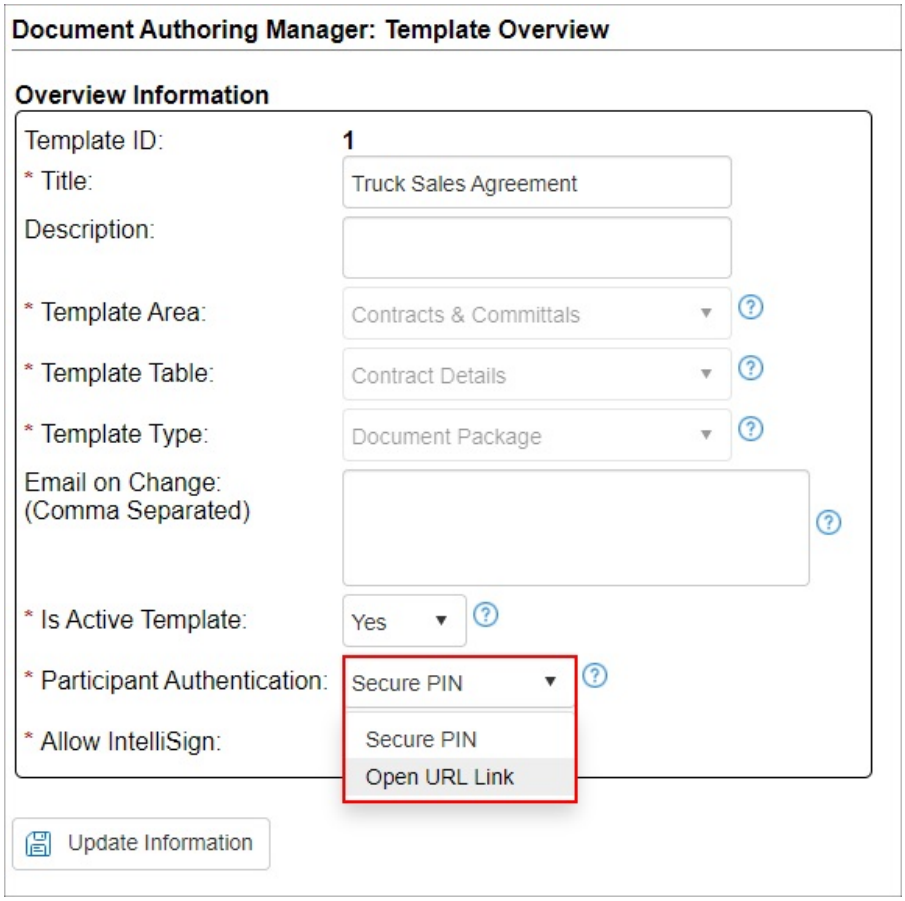
Types of Authentication

Document Collaboration Gateway E-Approvals & E-Signatures: Types of Authentication

There are two distinct types of authentication that can be used for the E-Processes:

1. **Secure PIN** – This requires users to select a password for the collaboration portal. If they have not previously used the portal, the user is asked to create a PIN (This PIN does not have to be numeric). If it is not his or her first time, the user needs to use the PIN already created.

2. **Open URL Link** – This option gives a link to the E-Process and takes users directly to the portal without requiring authentication. Users can view and complete their process.



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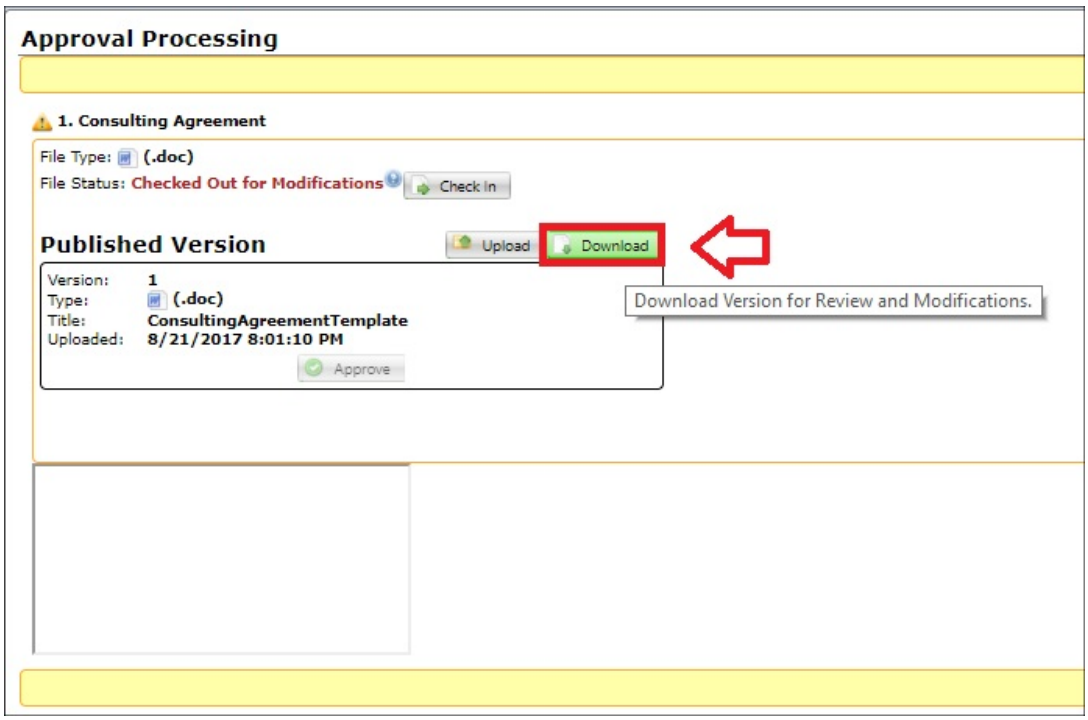
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Approving & Reviewing Documents - E-Approvals

Approving & Reviewing Documents - E-Approvals

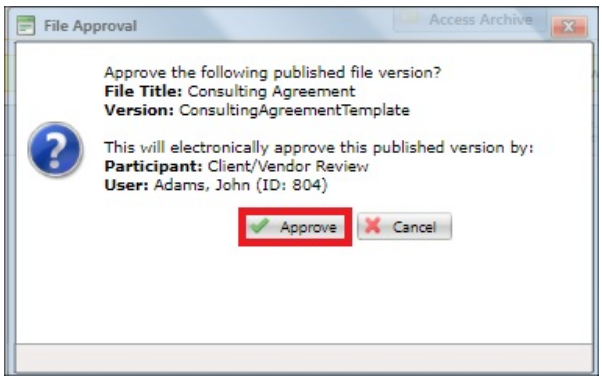
Document Collaboration Gateway E-Approvals & E-Signatures: Approving Documents

When the invitation email is received (Invitation in the subject line), click the link within to navigate to the **E-Approval process** (seen in Notifications & Email Alerts) in the **Document Collaboration Gateway**. Once the file is downloaded and the user makes changes necessary, save the document under a new name and upload a new file with a new version name. If no changes are made, check the document back in (if necessary) and click **Approve**.

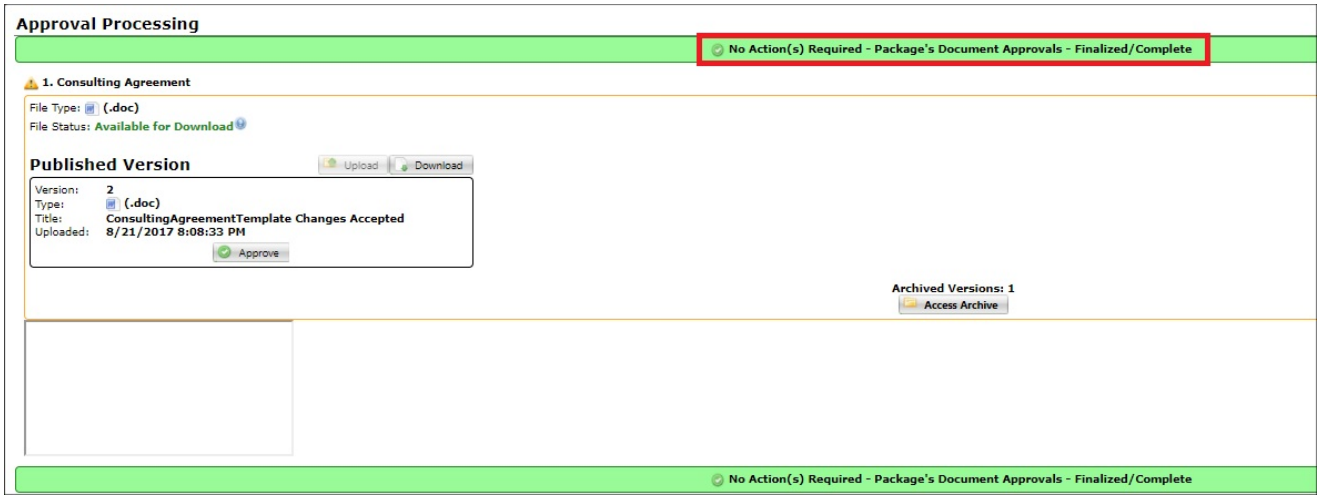


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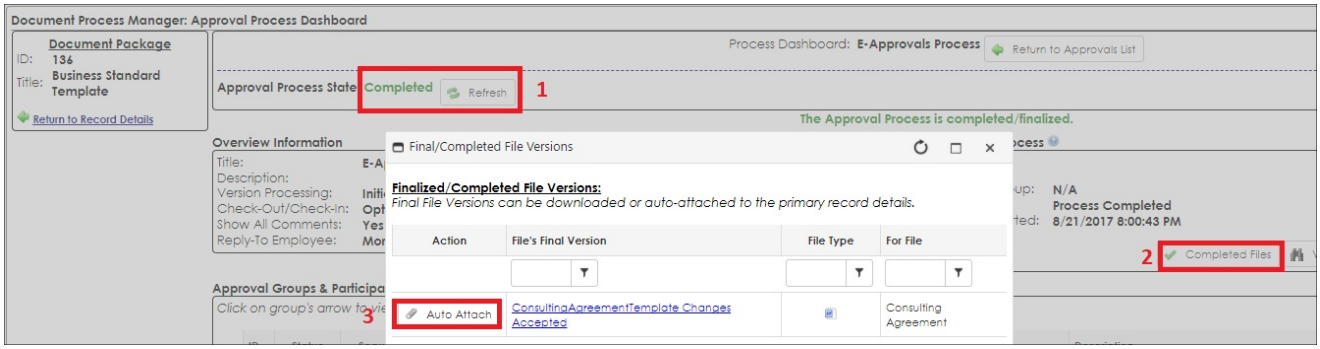
A pop-up window displays. Click **Approve** to verify that the document is approved.



Once the approval has been completed, the user is presented with a prompt indication that no additional action(s) are required. The user will know when the process is complete as well from the text in the now green section towards the top and bottom of the gateway.



The user managing the process in Contract Insight can view the completion once all parties have finished. This is all done through the Dashboard for the process.



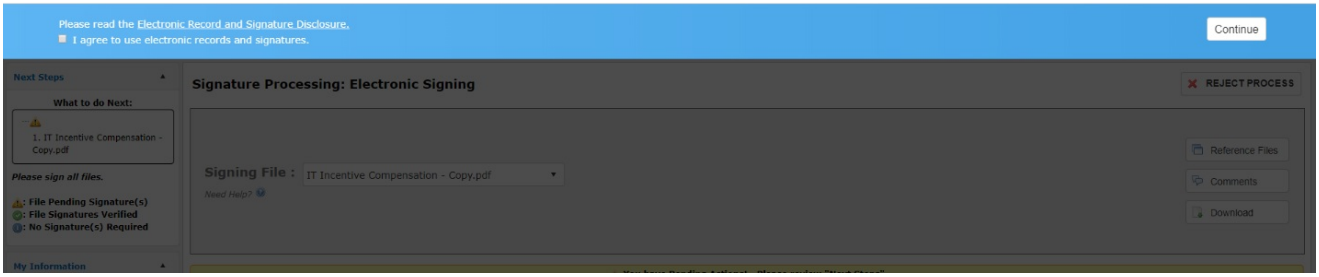
A number of options are available:

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1. View the process' current state, **In Process** or **Completed**.
2. View and manage the completed file.
3. In the pop-up window, download the file to view as well as **auto-attach** it to the **Record Details** screen. The file displays in the **Files/Attachments** section of the record.

Prompt Before Signing / Approving

This is a new feature to CobbleStone that enables companies to add their own Terms and Conditions, which the Signer must accept before they can sign the document. The Admin of the system can Enable or disable this feature, as well as edit the Terms and Conditions section. Only once the signer accepts the Terms and conditions, will they be allowed to sign the document. The system will log the date and time when the Signer accepted the Terms and conditions. If the Signer had previously opened the same document and agreed to the Terms and Conditions, they will not be asked to accept the Terms and Conditions again for that document as the signer already accepted it previously.



CONFIGURATION

Admins may choose to Disable / Enable this feature in their system. To do so, go to :

Manage Setup > Application Configuration > Config Settings

In the combo box to select Configuration Group, choose Document Authoring.

You'll see 2 App Config settings associated with this feature :

1) Terms and Conditions : Enabling this will make the Signer first agree to the Terms and Conditions before he / she can sign the document.

2) Terms and Conditions Content : The Terms and Conditions content to show the Signer.

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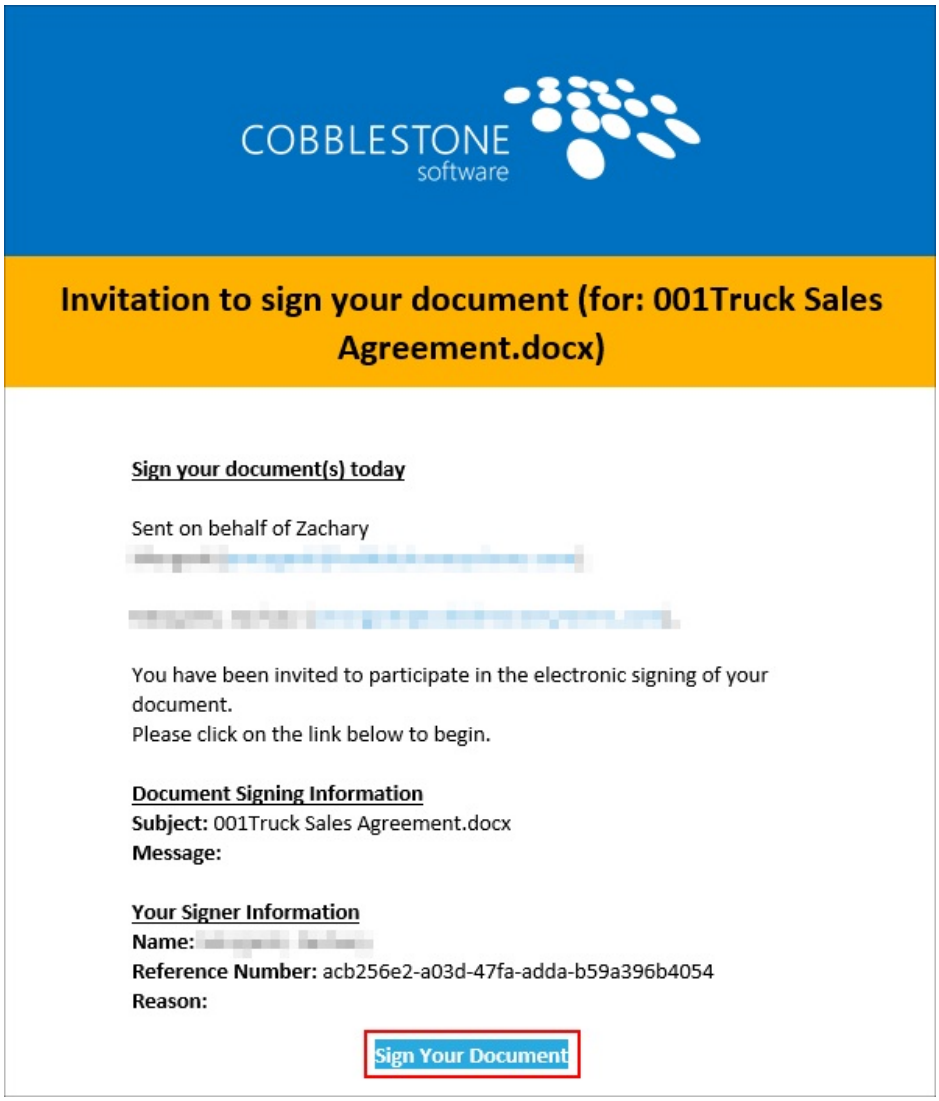
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Notifications & Email Alerts - E-Approvals

Notifications & Email Alerts - E-Approvals

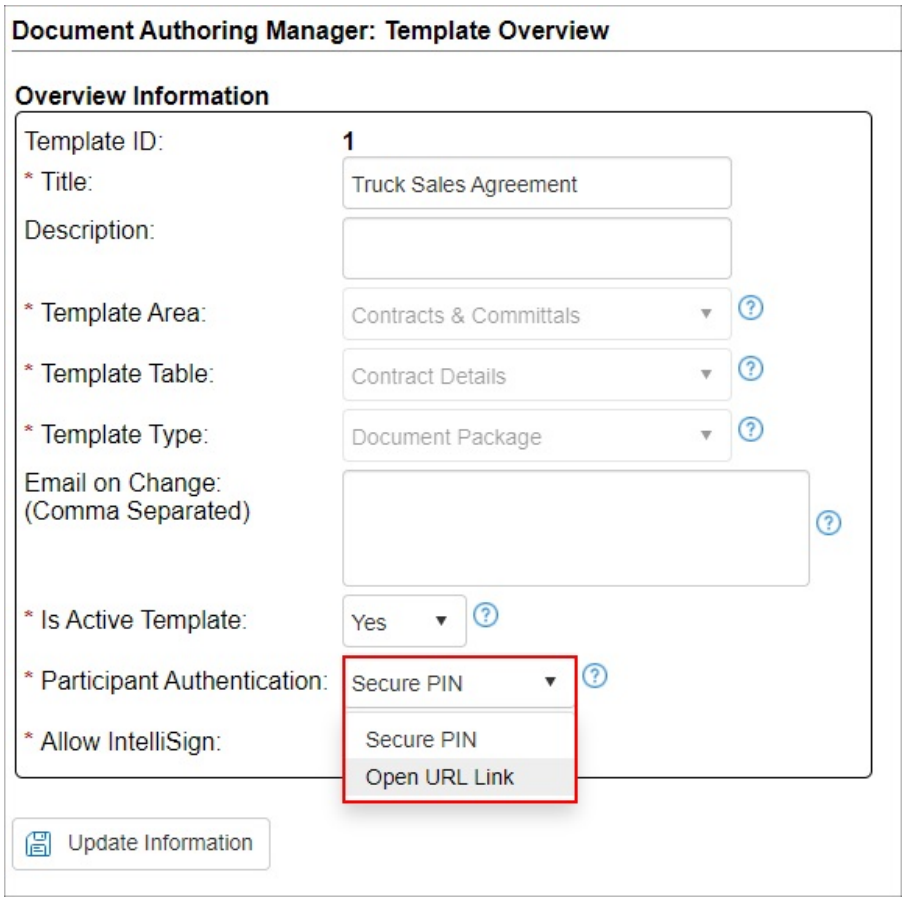
Document Collaboration Gateway E-Approvals & E-Signatures: Document Notifications & E-Mail Alerts for E-Approvals

An email with Invitation to in the subject line is sent to the participant(s). It is the email from which action is required. The participant(s) sees that they have been invited to E-Approve or E-Sign and, by clicking the link at the bottom of the email, is taken to the **Document Collaboration Portal**.



If the process requires a **Secure PIN**, each participant is required to provide or create one. If, however, the process was created for a **Direct URL Link**, no authentication is required.

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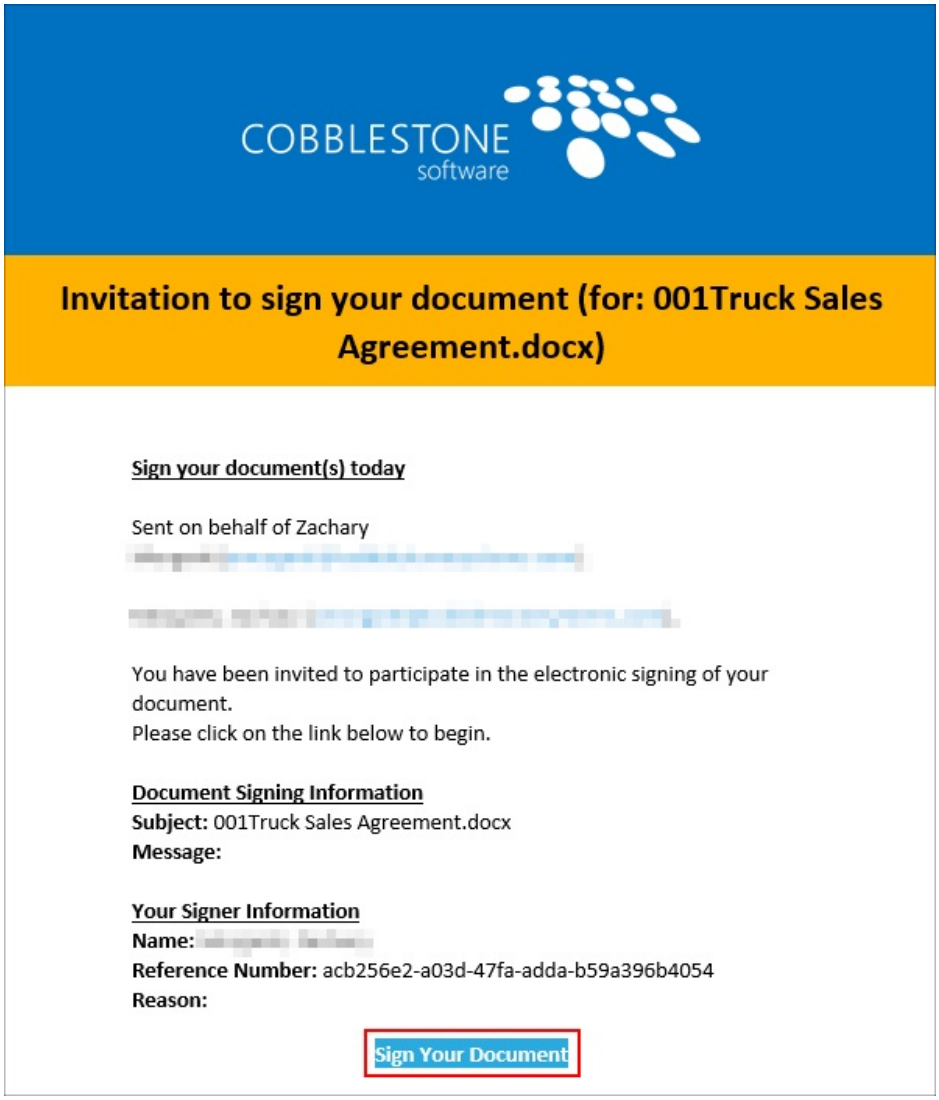
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Notifications & Email Alerts - E-Signature

Notifications & Email Alerts - E-Signature

Document Collaboration Gateway E-Approvals & E-Signatures: Document Notifications & E-Mail Alerts for E-Signature

An email with Invitation to in the subject line is sent. Once received click the **Sign Document(s)** link.

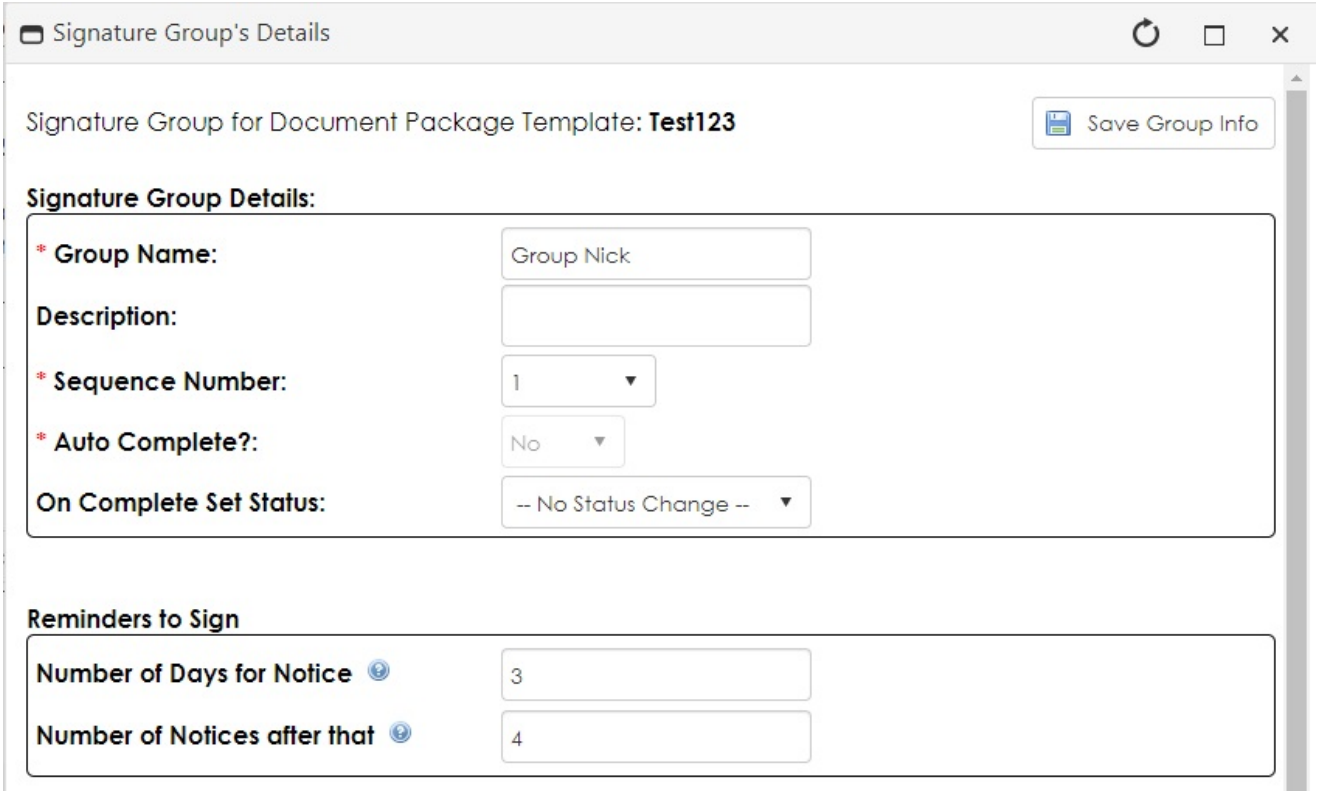


When the link is clicked, the participant is then taken to the **Document Collaboration Gateway** to Sign the Document. Within, the participant clicks **sign here** to d**raw**,**type**, or use a **saved signature** (if the participant is a Contract Insight User or a user of the Vendor Client Gateway).

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E-Sign Reminders to Sign

This is a handy feature addition to CobbleStone as it helps the Participants of an E-Signature Flow / Groups get reminder Emails if anyone in the group hasn't signed yet. While creating the Signature Group, the user can specify the Number of Days for the first notice to go out as well as the Number of notices to send after that.



For example, if you specify the Number of Days for Notice as 3, and the Number of Notices after that as 4, then Emails will be sent on the 3rd day from the process start, then on the 6th, 9th, 12th and 15th days.

CONFIGURATION

Admins may choose to Disable / Enable this feature in their system. To do so, go to :

Manage Setup > Application Configuration > Config Settings

In the combo box to select Configuration Group, choose Document Authoring.

You'll see 1 App Config settings associated with this feature :

1) Reminder Emails to Sign: Enabling this will send Reminder Emails if any participant hasn't signed the document.

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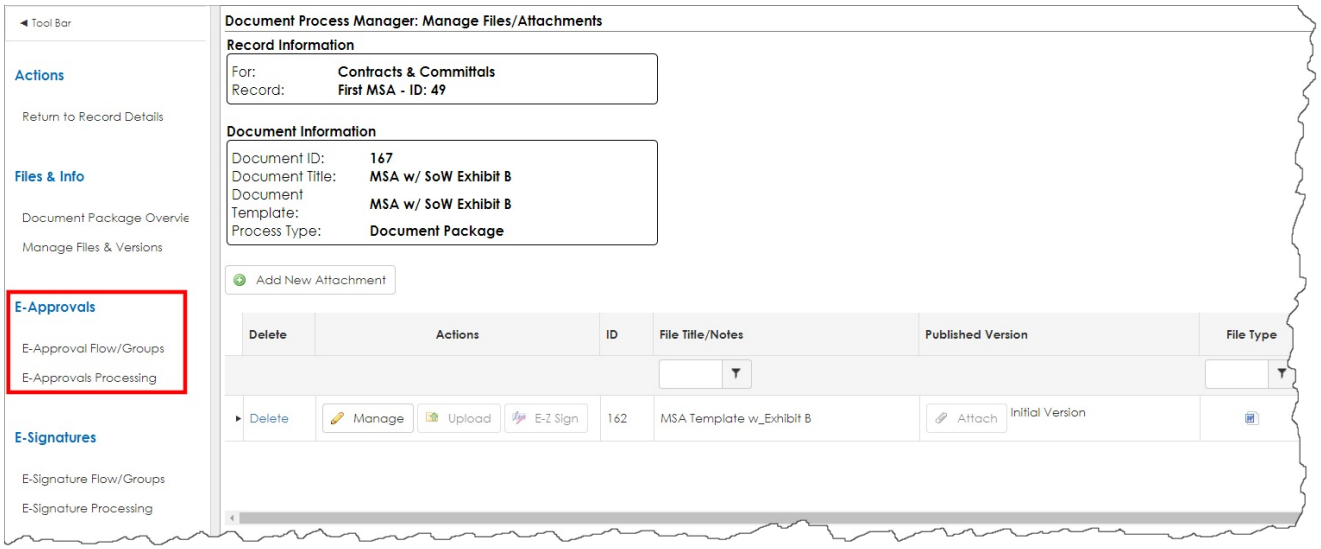
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Initiating an eApproval

Initiating an eApproval

Initiating an eApproval Process

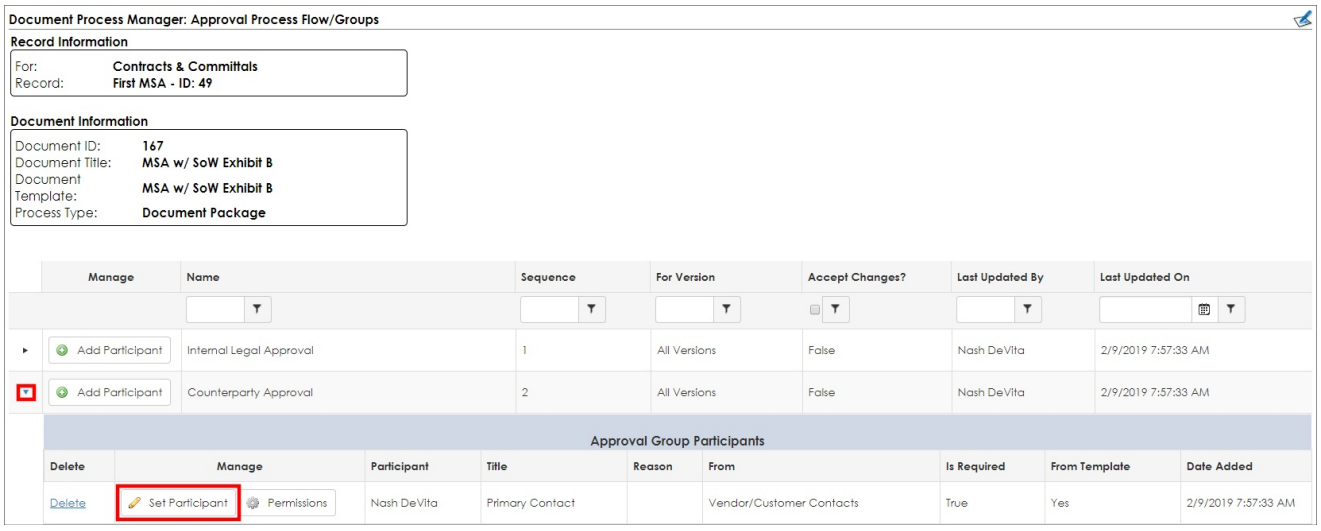
Once a template has an eApproval flow configured, the participants can be finalized and the process can be initiated from the created document package.



Confirm the E-Approval Flow/Group

1. Click **E-Approval Flow/Group**.

2. Click the **Carat** for the desired group.



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3. Click **Set Participant**.

4. From the **Select Participant** pick-list, select the desired participant.



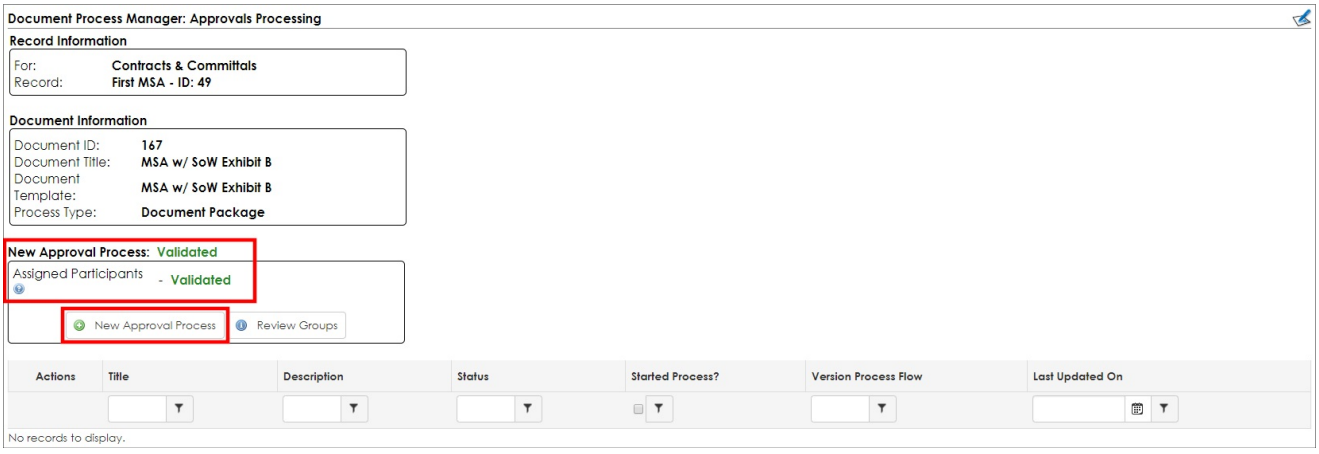
5. Click **Alter Participant**.

6. Repeat as necessary for other Approval Groups.

Starting the E-Approval Process

1. On the side menu, click **E-Approvals Processing**.

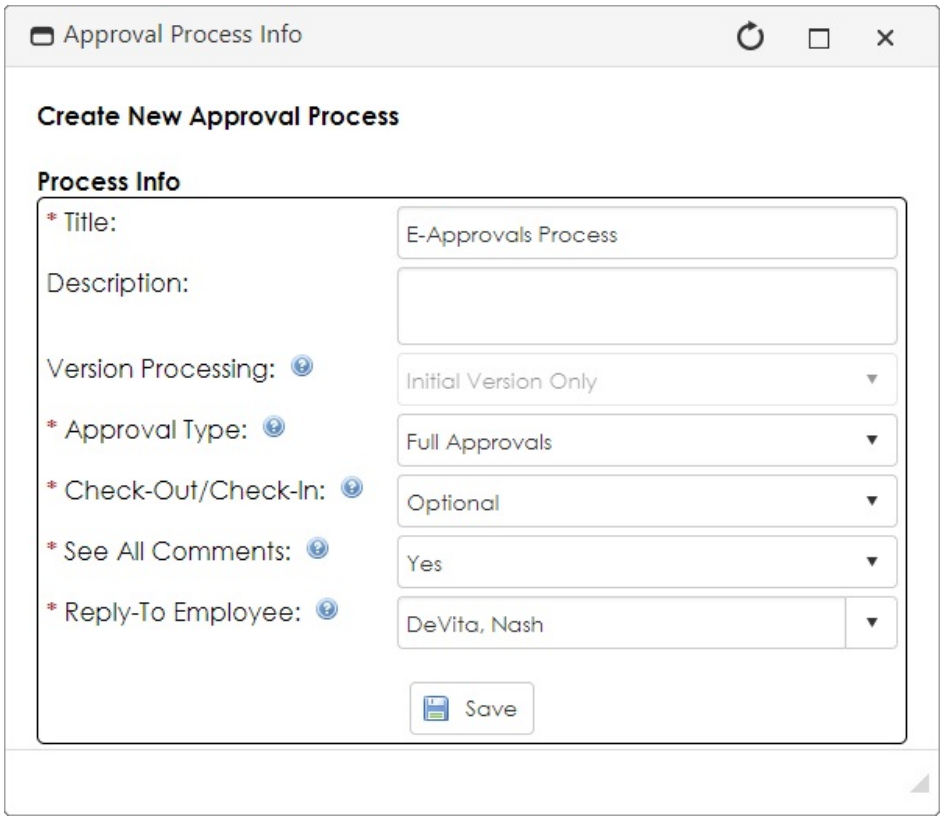
2. The Process Manager screen displays.



3. If all participants have been set, **New Approval Process** and **Assigned Participants** will both display as Validated. If they are not Validated, check the assigned participants.

4. Click **New Approval Process**.

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5. Set all options - paying special attention to the **Approval Type**.



Approval Type has two options:

Acknowledge Only: Only receipt of the document is required

Full Approvals: The document must be reviewed and then attested to for approval of the document.

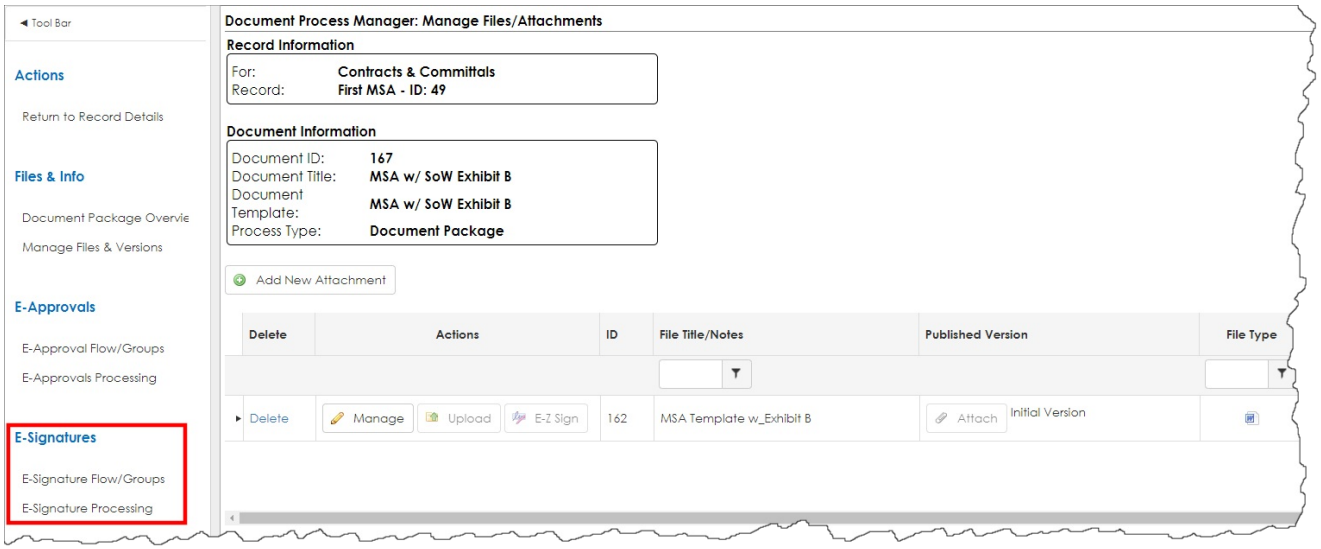
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Initiating an eSignature Process

Initiating an eSignature Process

Initiating an eSignature Process

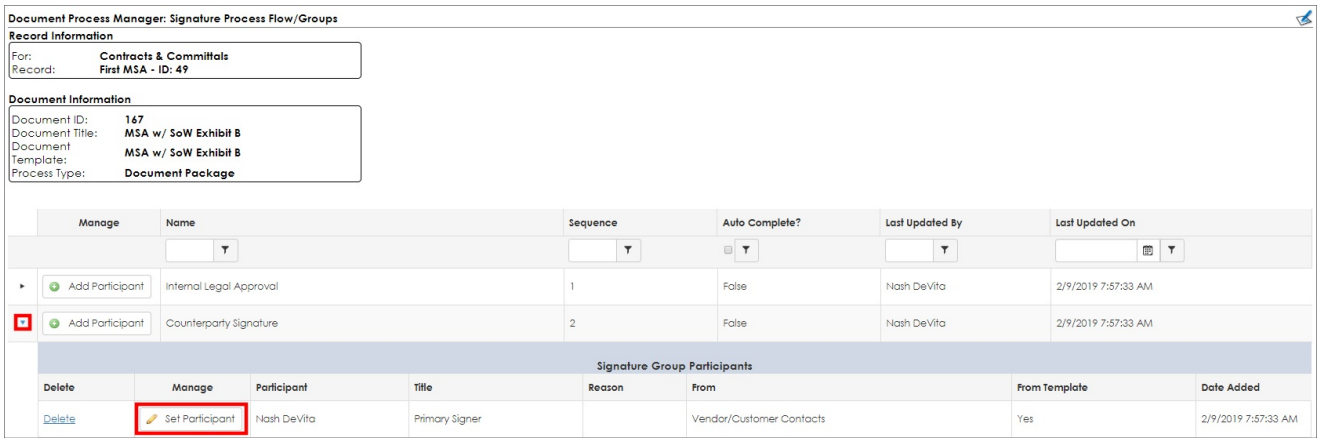
Once a template has an eSignature flow configured, the participants can be finalized and the process can be initiated from the created document package.



Confirm the E-Signature Flow/Group

1. Click **E-Signature Flow/Group**.

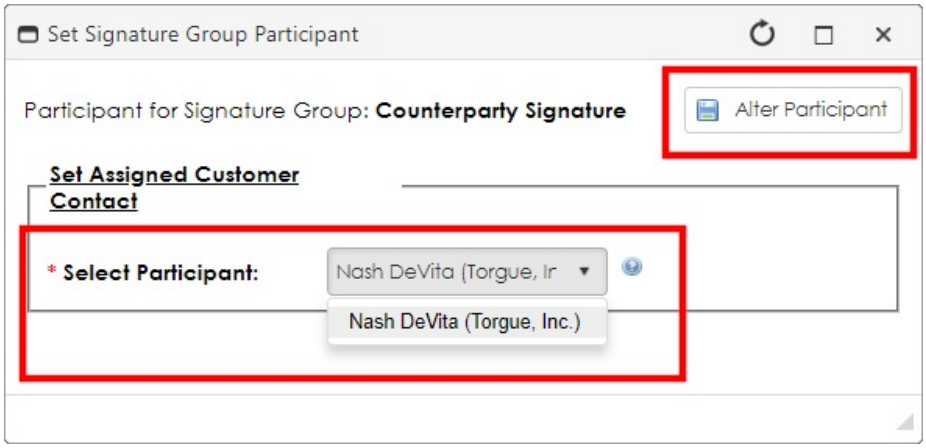
2. Click the **Carat** for the desired group.



3. Click **Set Participant**.

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4. From the **Select Participant** pick-list, select the desired participant.



5. Click **Alter Participant**.

6. Repeat as necessary for other Signature Groups.

Starting the E-Signature Process

1. On the side menu, click **E-Signature Processing**.

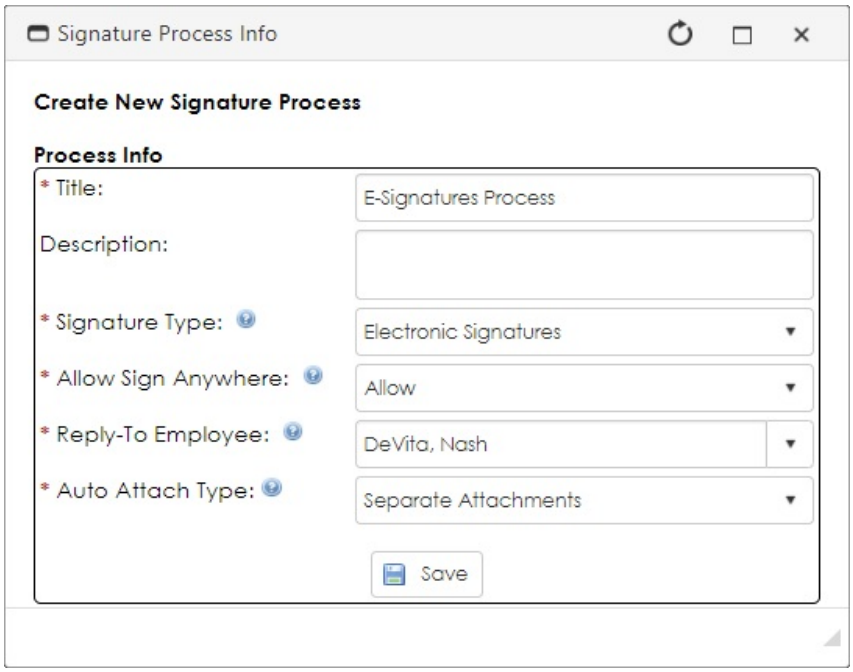
2. The Process Manager screen displays.



3. If all participants have been set, **New Signature Process** and **Assigned Participants** will both display as Validated. If they are not Validated, check the assigned participants.

4. Click **New Signature Process**.

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5. Set all options - paying special attention to the **Auto Attach Type**.



Auto Attach Type has two options:

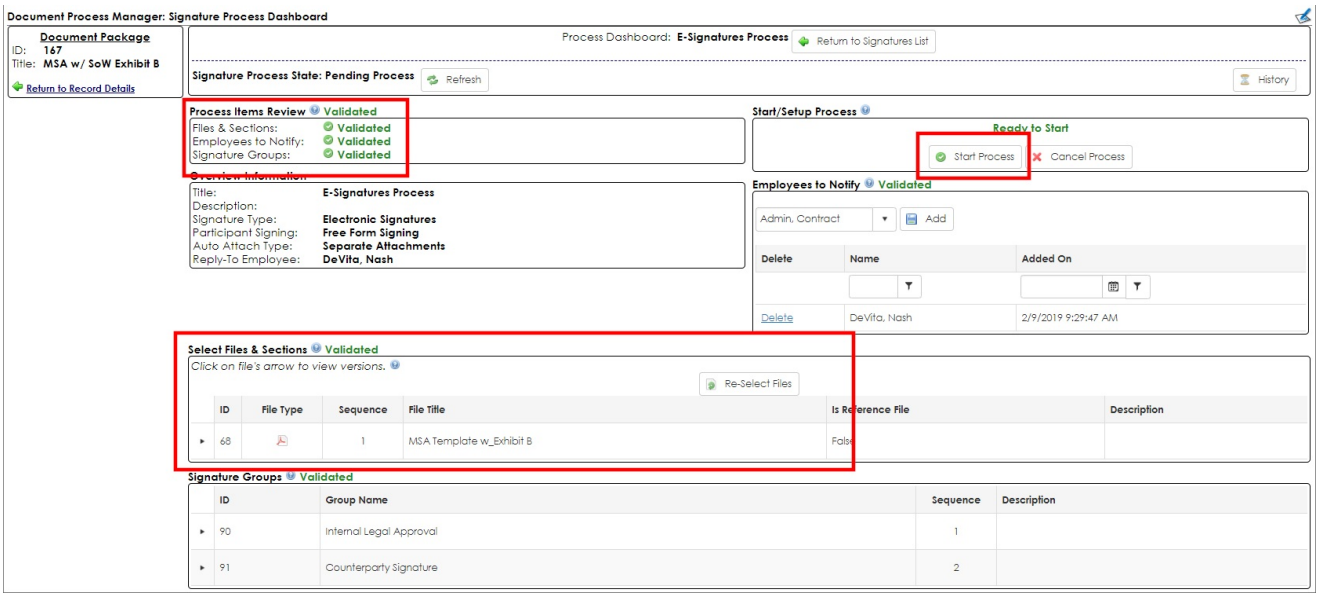
Separate Attachments: Each document must be signed individually.

Single PDF: All documents selected are merged into a single document for signing.

6. Once all options have been set, click **Save**.

7. Select all documents for signature.

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8. Once all participants and documents for processing have been selected, verify that all **Process Items** are listed as Verified.

9. Click **Start Process** to launch the signature process to send alerts to the appropriate participants.

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CobbleStone Electronic Signatures Overview

CobbleStone Electronic Signatures Overview

CobbleStone Electronic Signatures

Electronic document processing combined with electronic signatures is an effective method of doing business. Below is useful information about CobbleStone Document Processing and electronic signature offerings:

CobbleStone Document Processing: CobbleStone document processing, licensed under the CobbleStone Document Collaboration Module enables organizations to leverage templates, standard text, merging field data, merging text, merging clauses, rules, storage, version tracking, permissions, workflow approvals, and document versioning to speed document processing for Requisition documents, Contract documents, Purchasing documents, Vendor/Customer documents, Sourcing documents and Employee documents. When combined with electronic signatures, document processing becomes more valuable.

CobbleStone Electronic Signatures: CobbleStone Electronic Signature Module is a good add-on to an organization’s document processing activities as it relates to Requisition documents, Contract documents, Purchasing documents, Vendor/Customer documents, Sourcing documents and Employee documents. CobbleStone's electronic signatures offer simple (basic) electronic signatures that include placing images of signature on documents and general acknowledgement confirming the signature by the signor. In general, the CobbleStone electronic signed documents have basic validation and are tracible based on e-mail, signed image, and the signor's IP address and is stored on the server log for traceable. CobbleStone Document Collaboration with E-Sign license option to has an option to enable PIN plus e-mail authentication for Signors for better traceability and security. As with any electronic signing option, be sure to have an attorney from your organization confirm the validity of each signed document based on the applicable governing law.

Advanced and Digital Signing: Digital Signing differs from electronic signatures as digital signing offers an enhanced digital certificate to validate the signor and signor process. For more advanced signing and Digital Signing, CobbleStone offers integration with Adobe Sign and DocuSign.

Adobe Sign Integration Option: CobbleStone offers a plug-in integration as an add-on license with Adobe Sign document signing. This process provides both the benefit of the CobbleStone document processing features, plus the advanced signing capabilities of Adobe Sign. It helps with the document assembly, field merging, workflow approvals, version tracking and easy hand off to Adobe Sign for advanced signing [once fully signed the document is returned to CobbleStone for further processing and storage]. Adobe Sign is a licensed by Adobe, subject to its License, and requires a separate license with Adobe As with any electronic signing option, be sure to have an attorney from your organization confirm the validity of each signed document based on the applicable governing law.

DocuSign Integration Option: CobbleStone offers a plug-in integration as an add-on license with DocuSign document signing. This process provides both the benefit of the CobbleStone document processing features, plus the advanced signing capabilities of DocuSign. Combined together, It helps with the document assembly, field merging, workflow approvals, version tracking and easy hand off to DocuSign for advanced signing [once fully signed the document is returned to CobbleStone for further processing and storage]. DocuSign is a licensed by DocuSign, subject to its License, and requires a separate license with DocuSign. As with any electronic signing option, be sure to have an attorney from your organization confirm the validity of each signed document based on the applicable governing law.

Please contact your CobbleStone and third-party eSign representatives to ensure your licensed product/edition supports the integration

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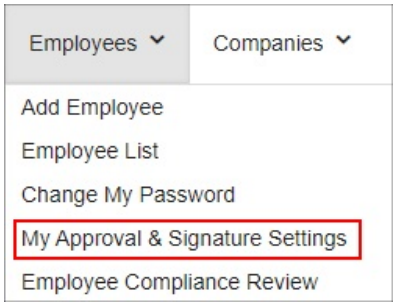
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Managing E-Signature & PIN

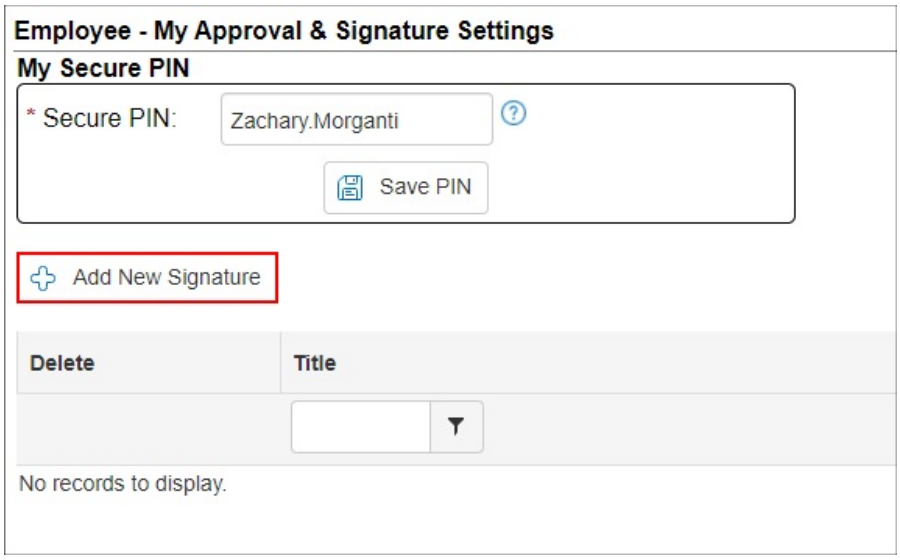
Managing E-Signature & PIN

Document Collaboration Gateway Settings & Functionality: Manage E-Signatures and PIN

Users can manage their **E-Signature** and **PIN** by going to **Employees** > **My Approval & Signature Settings**.

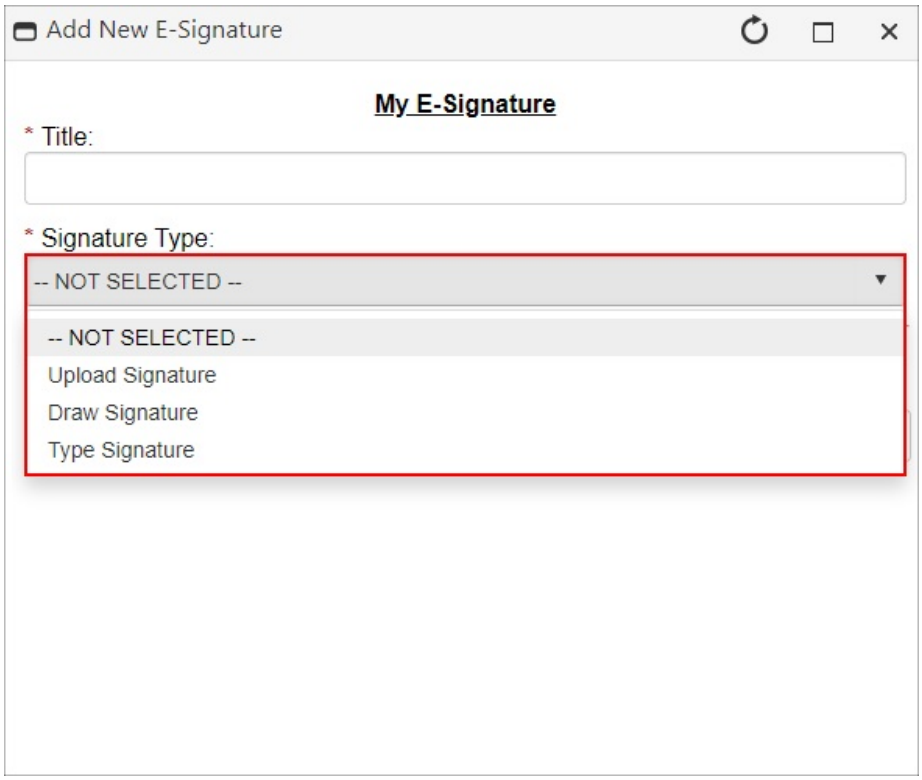


On the next screen, the user can to see their **Secure PIN** for the **E-Approval and E-Signature** processes as well as upload a signature to be used for the E-Signature process.

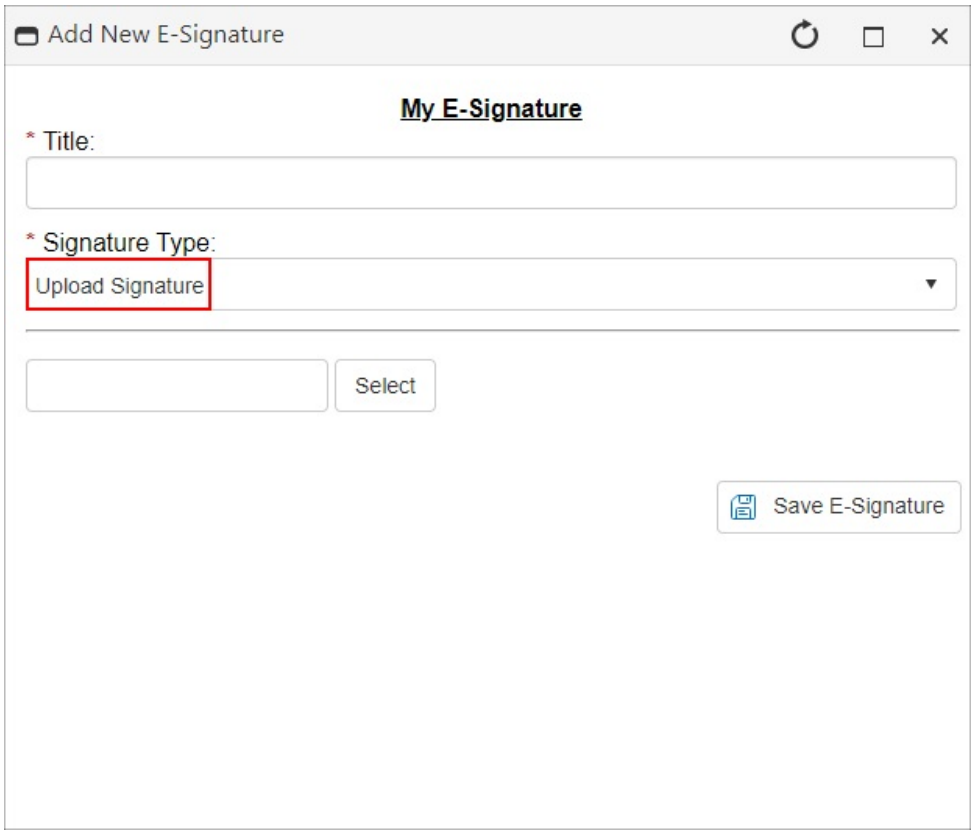


There are 3 options for the **E-Signature**:

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1. **Upload Signature** – Upload a signature that is saved to a local/network drive.

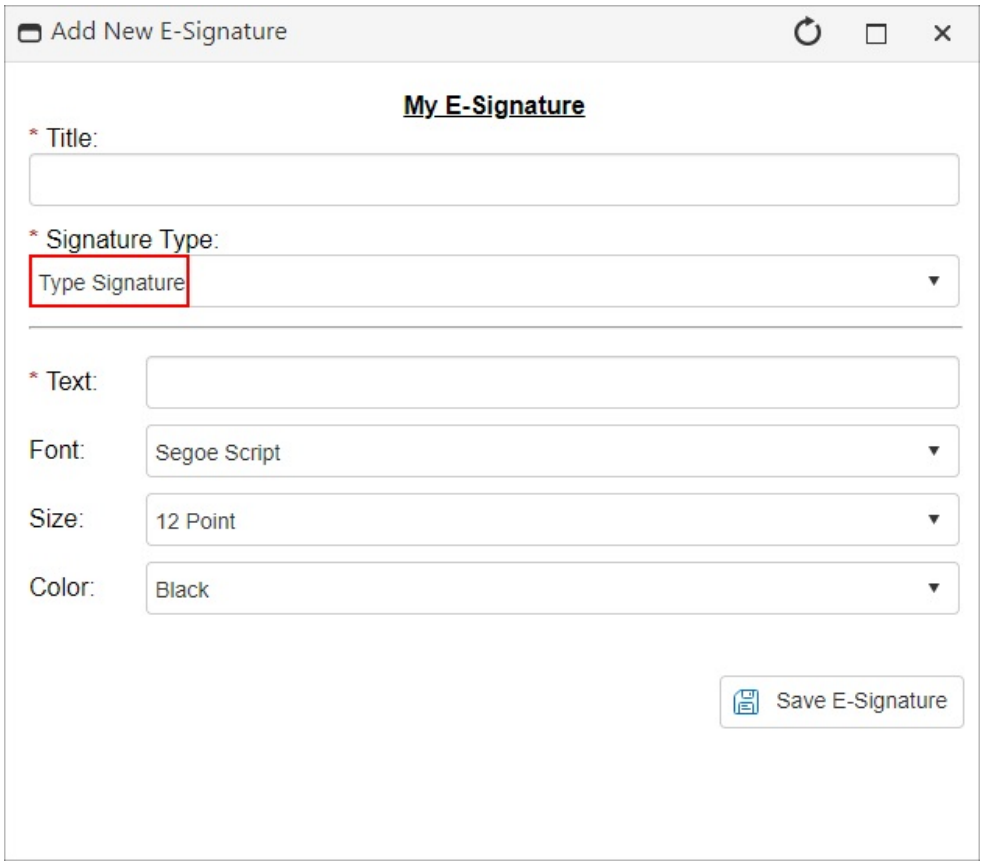


2. **Draw Signature** – Use the included tool to draw a signature and then save it.

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3. **Type Signature** – Use the available fonts in the system to type the signature.



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Access E-Approval/Signature Processes Assigned

Access E- Approval/Signature Processes Assigned

Document Collaboration Gateway Setting & Functionality: Access Processes Assigned To

Users can access the approval processes to which they are assigned by navigating to **Negotiations** > **My Assignments**. (If you are not a System Administrator or do not have the permission to Manage Approval or Signature Processes, you will not see the other two items under the negotiations menu item)

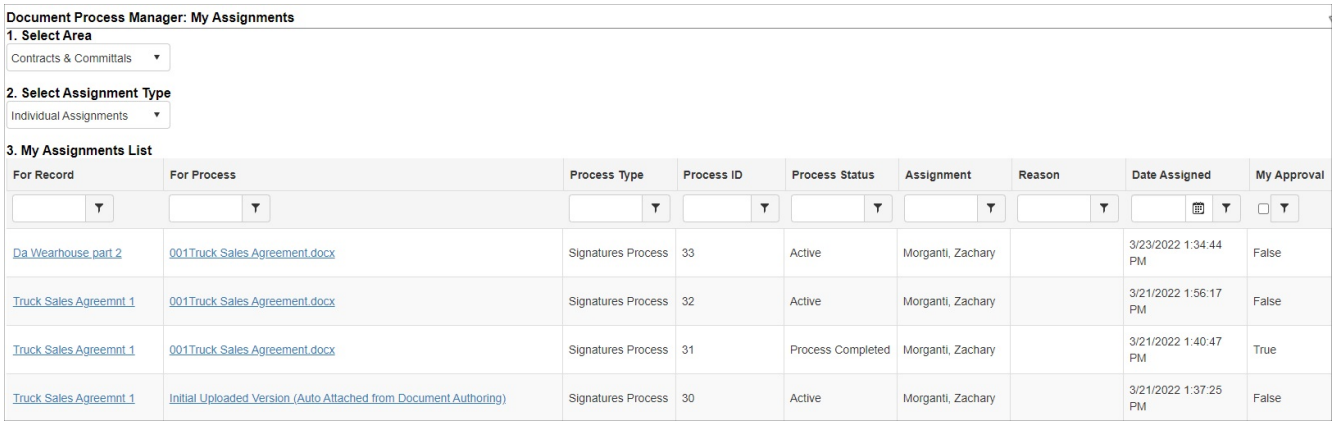


On the next screen users can see the approval or signature processes to which they are assigned as either an individual or as part of an Employee Role/Group.

1. Select the area of the system for which the process applies.
2. Select the assignment type. (Individual Assignments or Group Assignments)
3. My Assignments List will show you the assignments based on the criteria from numbers 1 and 2.

By clicking the link under **For Process**, the user is taken to the **Document Collaboration Portal** where he or she can view what action is required or what action(s) he or she has taken in the process. The other columns on the **My Assignments** page provide more information about the process (e.g. Process Status, Date Assigned, etc.).

Note: The link on the left goes to the record details page with which the Document Process is associated.



For Record	For Process	Process Type	Process ID	Process Status	Assignment	Reason	Date Assigned	My Approval
Da Wearhouse part 2	001Truck Sales Agreement.docx	Signatures Process	33	Active	Morganti, Zachary		3/23/2022 1:34:44 PM	False
Truck Sales Agreemnt 1	001Truck Sales Agreement.docx	Signatures Process	32	Active	Morganti, Zachary		3/21/2022 1:56:17 PM	False
Truck Sales Agreemnt 1	001Truck Sales Agreement.docx	Signatures Process	31	Process Completed	Morganti, Zachary		3/21/2022 1:40:47 PM	True
Truck Sales Agreemnt 1	Initial Uploaded Version (Auto Attached from Document Authoring)	Signatures Process	30	Active	Morganti, Zachary		3/21/2022 1:37:25 PM	False

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Manage E-Approval/Signature Processes

Manage E-Approval/E-Signature Processes

Document Collaboration Gateway E-Approvals & E-Signatures: Manage Processes

For System Administrators and Users with the permission to manage the **Document Collaboration processes**, clicking **Manage Approval Processes**, **Manage Signature Processes**, or **Manage IntelliSign Processes** takes the user to the screen to manage these processes.



Manage Approval Processes Screen

On the screen for Approval Processes admin users will see the following information.

1. Select the area of the system the process is for

2. The process list (See Column Explanations below)

    a. **For Record** – this link goes to the record the process is for

    b. **Process Title** – this link goes to the Document Process Dashboard

    c. **Process ID** – the unique ID assigned to the process

    d. **Status** – the status of the process

    e. **Is Started?** – has the process begun?

    f. **Show All Comments?** – if set to true all participants can see comments posted by clicking **Comments**. If set to No, participants can only see comments from other participants in their group

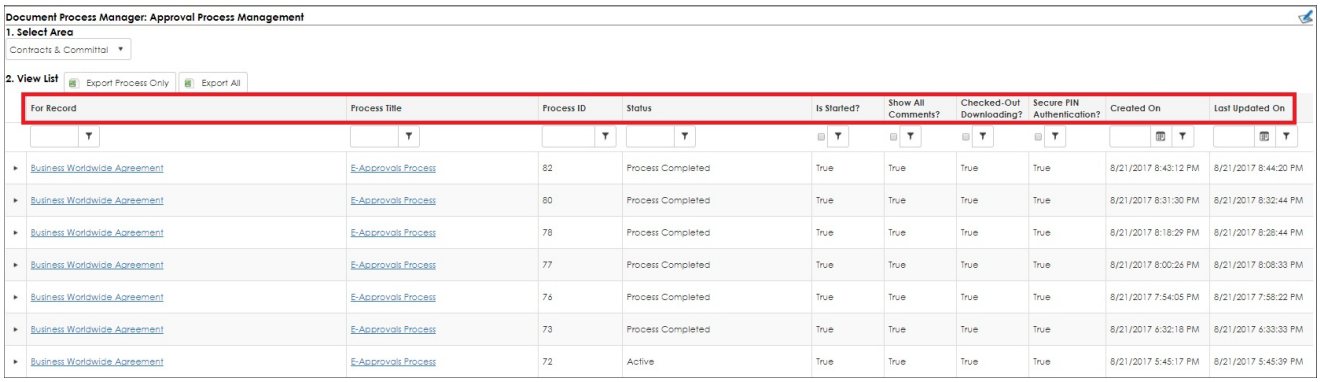
    g. **Checked-Out Downloading** – Is Checking Out of document forced?

    h. **Secure PIN Authentication** – is secure PIN required for this process?

    i. **Created On** – when the process was created

    j. **Last Updated On** – when the process was last updated

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Manage Signature Processes Screen

1. Select the area of the system the process is for
2. The process list (See Column Explanations below)

a. **For Record** – this link goes to the record related to this process

b. **Process Title** – this link goes to the Document Process Dashboard

c. **Process ID** – the unique ID assigned to the process

d.**Status** – the status of the process

e. **Is Started?** – has the process begun?

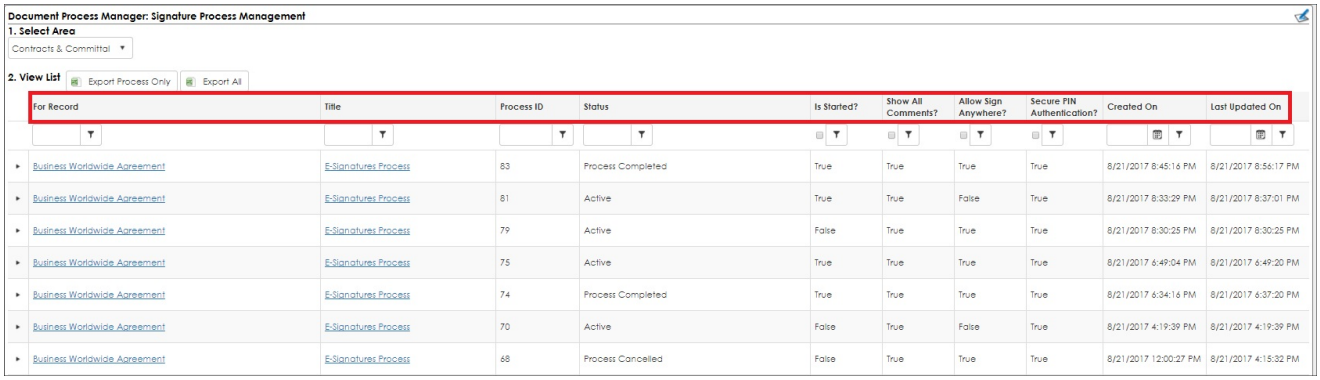
f. **Show All Comments?** – if set to true, all participants can see comments posted by clicking **Comments**. If set to No, participants can only see comments from other participants in their group

g. **Allow Sign Anywhere?** – can participants decide where they want to sign or will place holders be specified?

h. **Secure PIN Authentication** – is secure PIN required for this process?

i. **Created On** – when process was created

j. **Last Updated On** – when the process was last updated



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To Return to the Record

To view the record's details, click **Return to Record**.

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Contract Status Update

Contract Status Update

Contract Status Updates

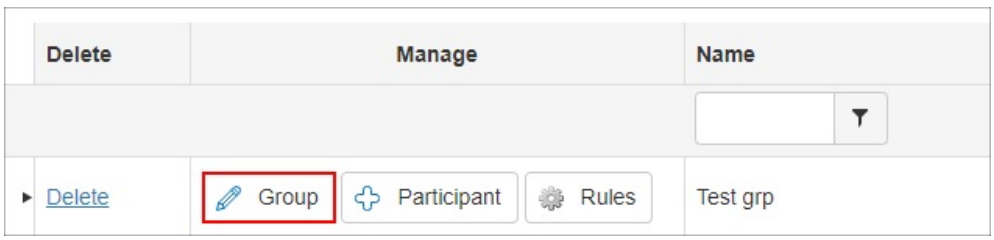
When establishing a flow/group for eApproval and/or eSignature, an admin can set a status value update for the document's associated contract record to be set when the group has completed its task(s). A status update can help drive internal workflow or simply operate as an indicator of approval/signature status for the record.

Establishing Status Updates

1. From the template's side menu, click **E-Approval Flow/Group** or **E-Signature Flow/Group** as applicable.

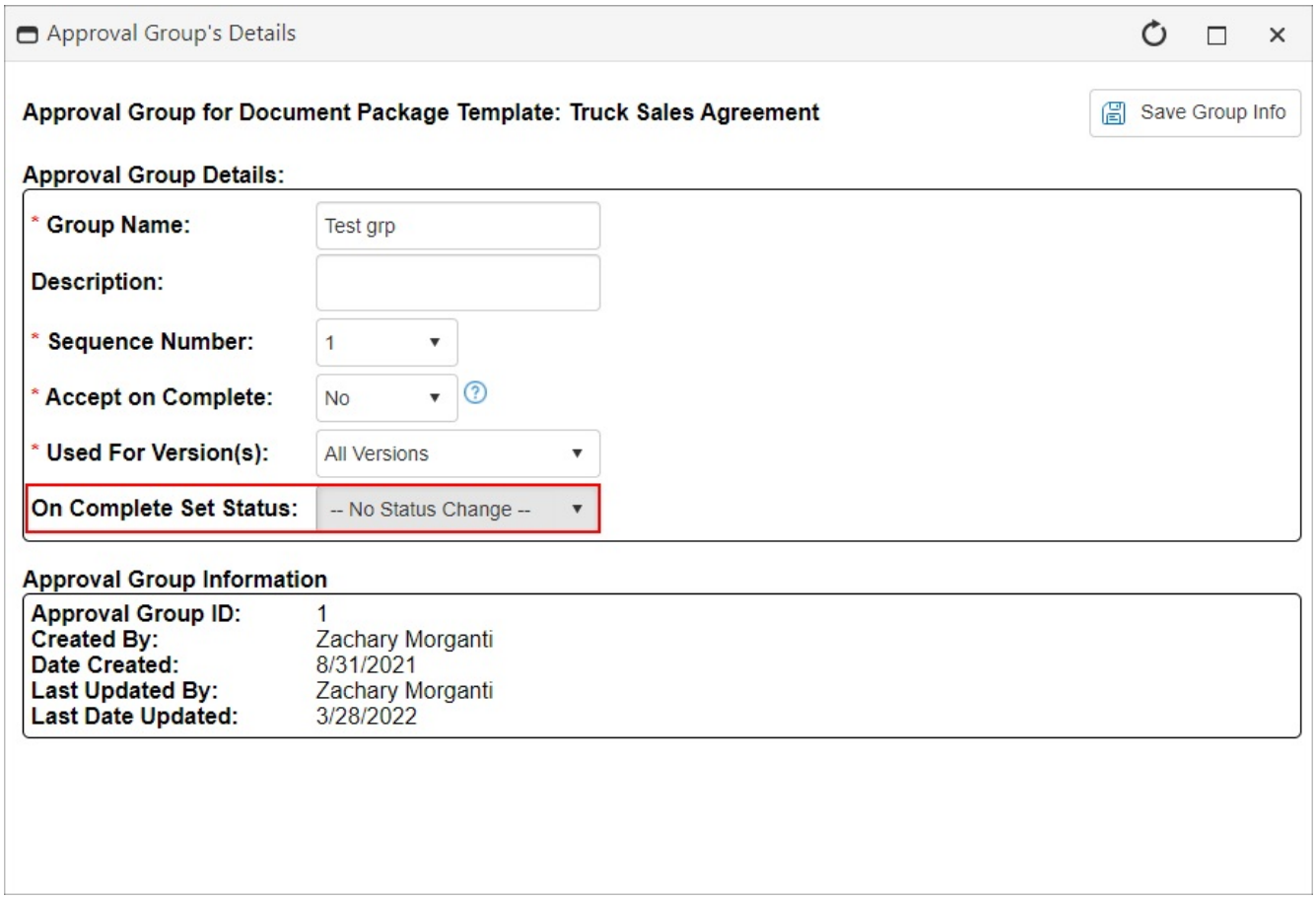


2. For the appropriate approval/signing group, click **Group** to access the details window for that group.



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3. The Group Details pop-up window displays. Open the **On Complete Set Status** pick-list and select the desired status to be set upon group completion.



4. Click **Save Group Info**.

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Manage E-Approval Clause Restrictions

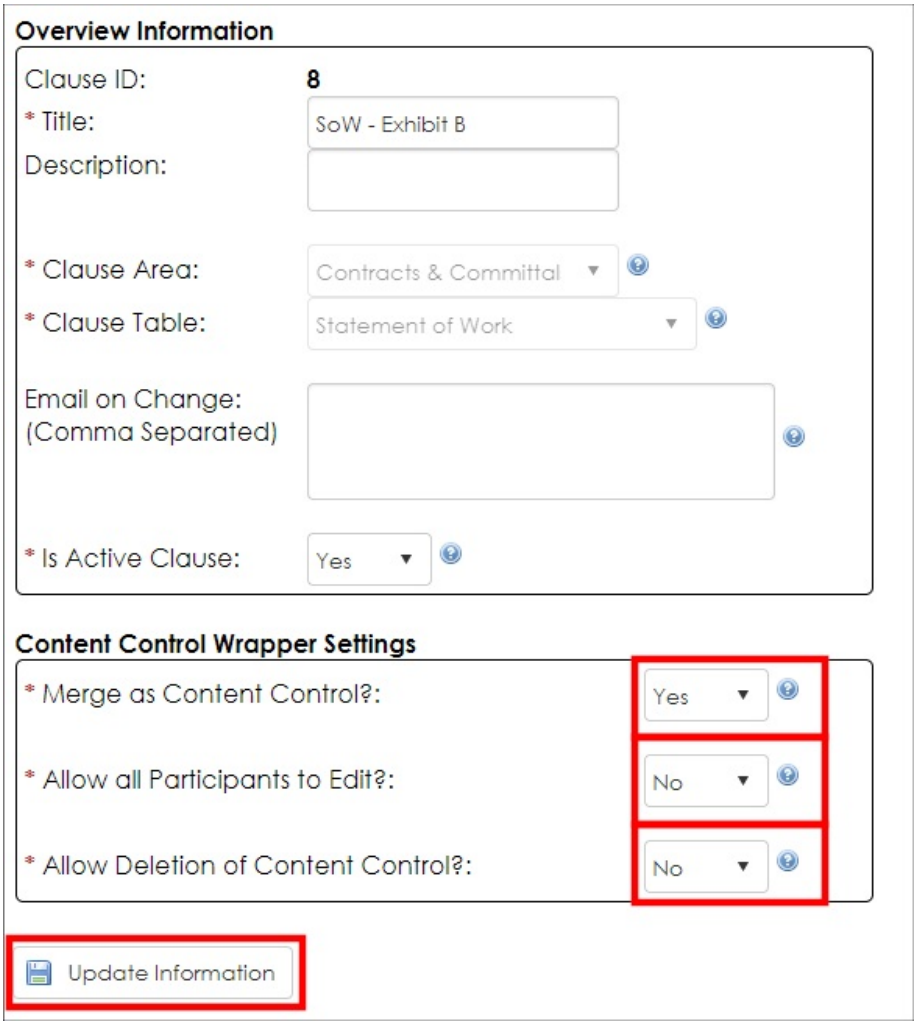
Manage E-Approval Clause Restrictions

Manage eApproval Clause Restrictions

Document Templates can use rules-driven **Mergeable Clauses**. These clauses may require alteration or replacement with a different clause. **Clause Restrictions** allow specified users to make limited or extreme changes to specified clauses.

Setting Clause Restriction Rules

1. An administrator can access the **Clause Restriction** rules by navigating to the mergeable clause overview.



2. If there are to be controls, set **Merge as Content Control** to Yes. Configure the other fields as necessary.

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- **Merge as Content Control?** Specifies if this mergeable clause rolls onto templates within a content control.
- **Allow all Participants to Edit?** If Merge as Content Control is selected above, is editing allowed for all participants?
- **Allow Deletion of Content Control?** If Merge as Content Control is selected above, can the entire content control be deleted?

3. Click **Update Information** if any changes are made.

Setting Permissions on the eApproval

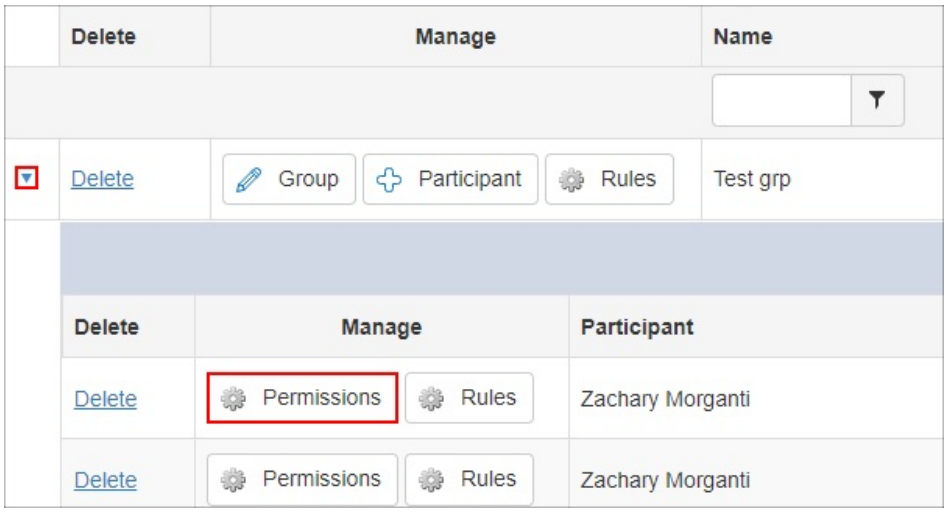
1. Navigate to the desired generated document package.

2. Click **E-Approval Flow/Groups**.



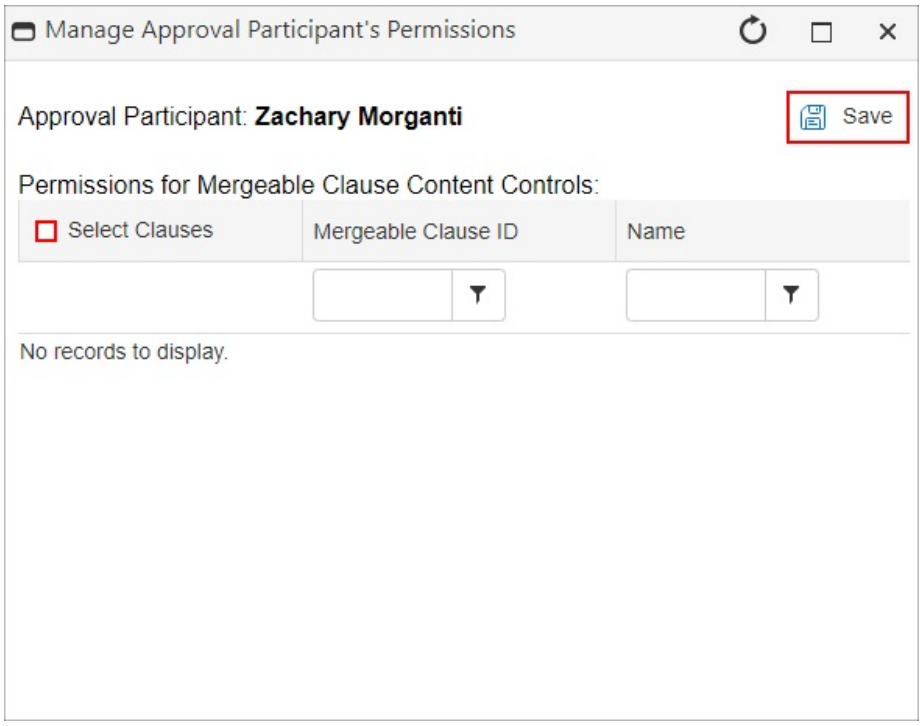
3. Click the carat for the group and participant to be configured.

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4. Click **Permissions** for the participant's line item.

5. Mark the tick-box(s) the clause(s) necessary or all clauses.



6. Click **Save** to save the clause edit/restriction permissions for that participant in the approval process.

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Manage E-Signatures and PIN

Manage E-Signatures and PIN

Document Collaboration Gateway Settings & Functionality: Manage E-Signatures and PIN

Users who have access to the Vendor/Client Gateway are able to manage their **PINs** and **Signatures** from the Gateway. Under the **Electronic Document** menu item (This can be renamed) select **My Approval & Signature Settings**. Users have the same three (3) options as seen in the **Manage E-Signature & PIN** page.



E-Processes users have to remember their PIN. The only option to **manage your pin** for external users is to reset the PIN. The user's Secure PIN will appear. If it is to be changes, click in the box and change the pin. Click **Save E-Signature** when complete.

Note: System administrators cannot reset PINs for users.



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Access E-Approval Signature Processes Assigned

Access E- Approval/Signature Processes Assigned

Document Collaboration Gateway Settings & Functionality: Access Processes Assigned To

In the **Vendor Client Gateway** users can access the E-Processes to which they are assigned via the top menu.



On the next screen users will be able to see the approval or signature processes they are assigned to as either an individual or as part of an Employee Role/Group.

1. Select the area of the system for which the process is to be applied.
2. Select the assignment type. (Individual Assignments or Group Assignments)
3. **My Assignments List** displays the assignments based on the criteria from numbers 1 and 2
4. Columns

a. **For Process** – This link goes to the **Document Process Dashboard**

b. **Process Type** – What kind of process is this, Approval or Signature?

c. **Process ID** – The unique ID assigned to the process

d. **Process Status** – The status of the process

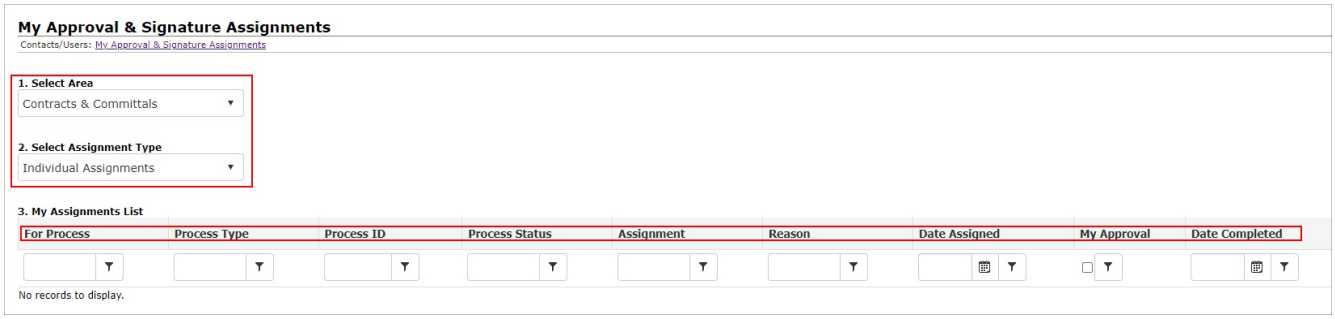
e. **Assignment** – What is the user's assignment as a participant

f. **Reason** – The reason an individual is assigned to the process

g. **Date Assigned** – When the process was assigned

h. **My Approval** – Has the singed in user completed the assigned?

i. **Date Completed** – When the process was completed



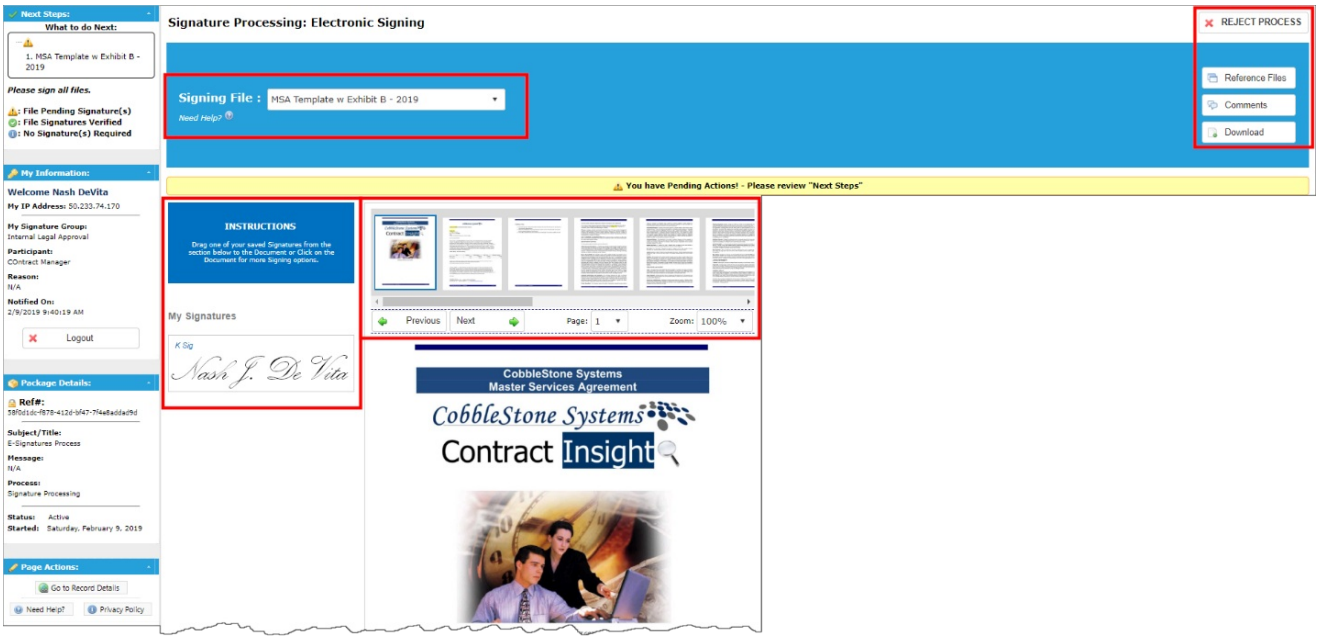
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Signing a Document

Signing a Document

eSigning a Document

Once logged into the Document Collaboration Gateway, the document to sign displays along with a number of options.

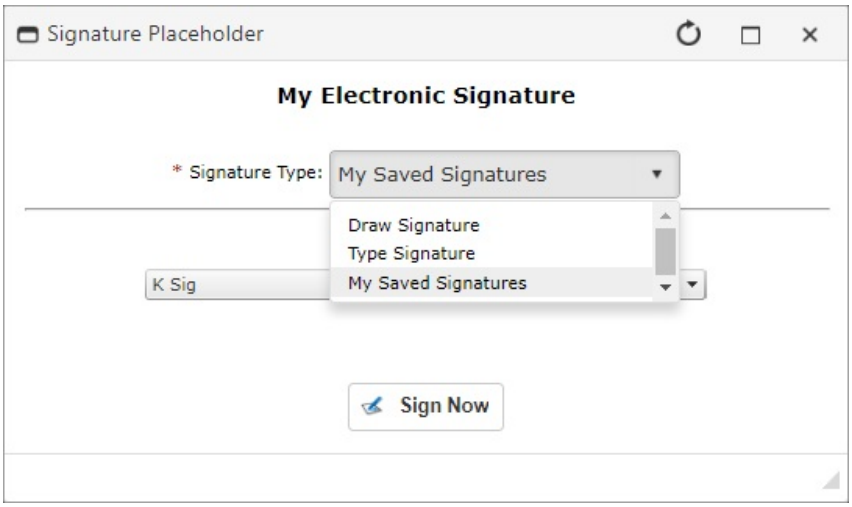


1. Navigate through the document by clicking a thumbnail image, forward/back buttons, and/or page selection .

2. Find the position, if specified, to apply a signature.

3. If available, drag a saved signature into position.

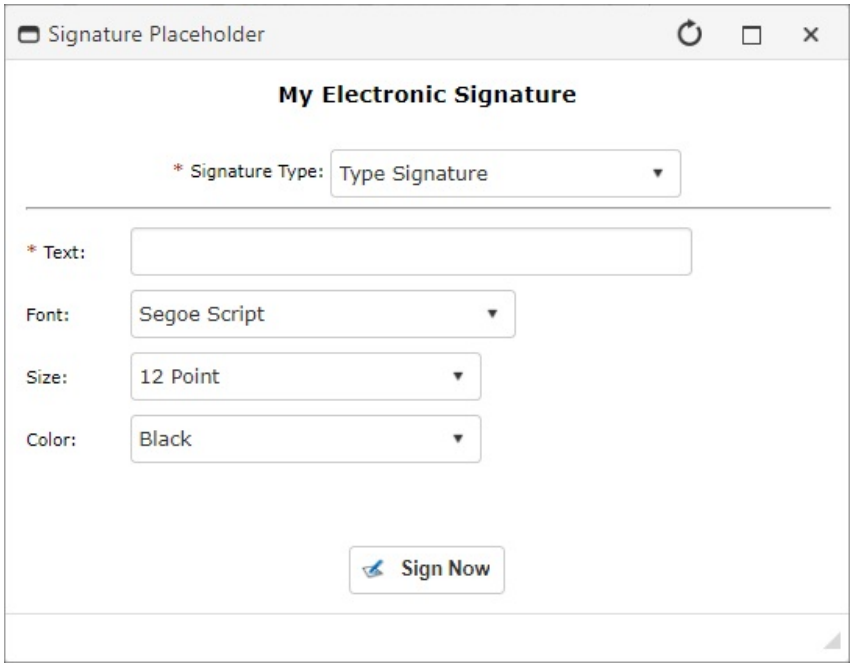
Alternatively, click an existing placeholder, or click to create placeholder for the signature. A pop-up window displays.



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If working without a saved signature, draw or type your signature in the pop-up window.





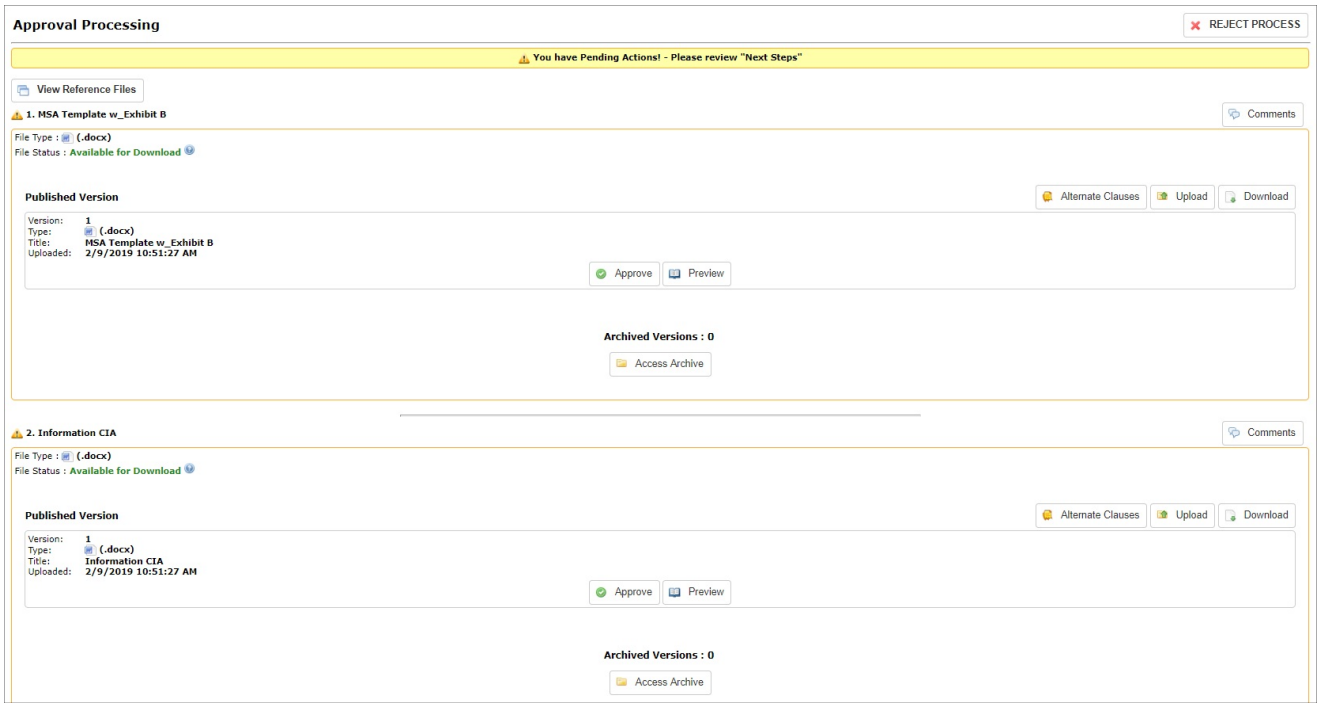
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Approving a Document

Approving a Document

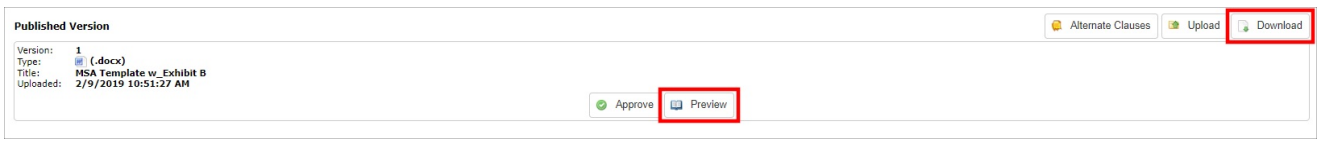
Approving a Document

Once logged into the Document Collaboration Gateway, a number of options are available to an approval participant.



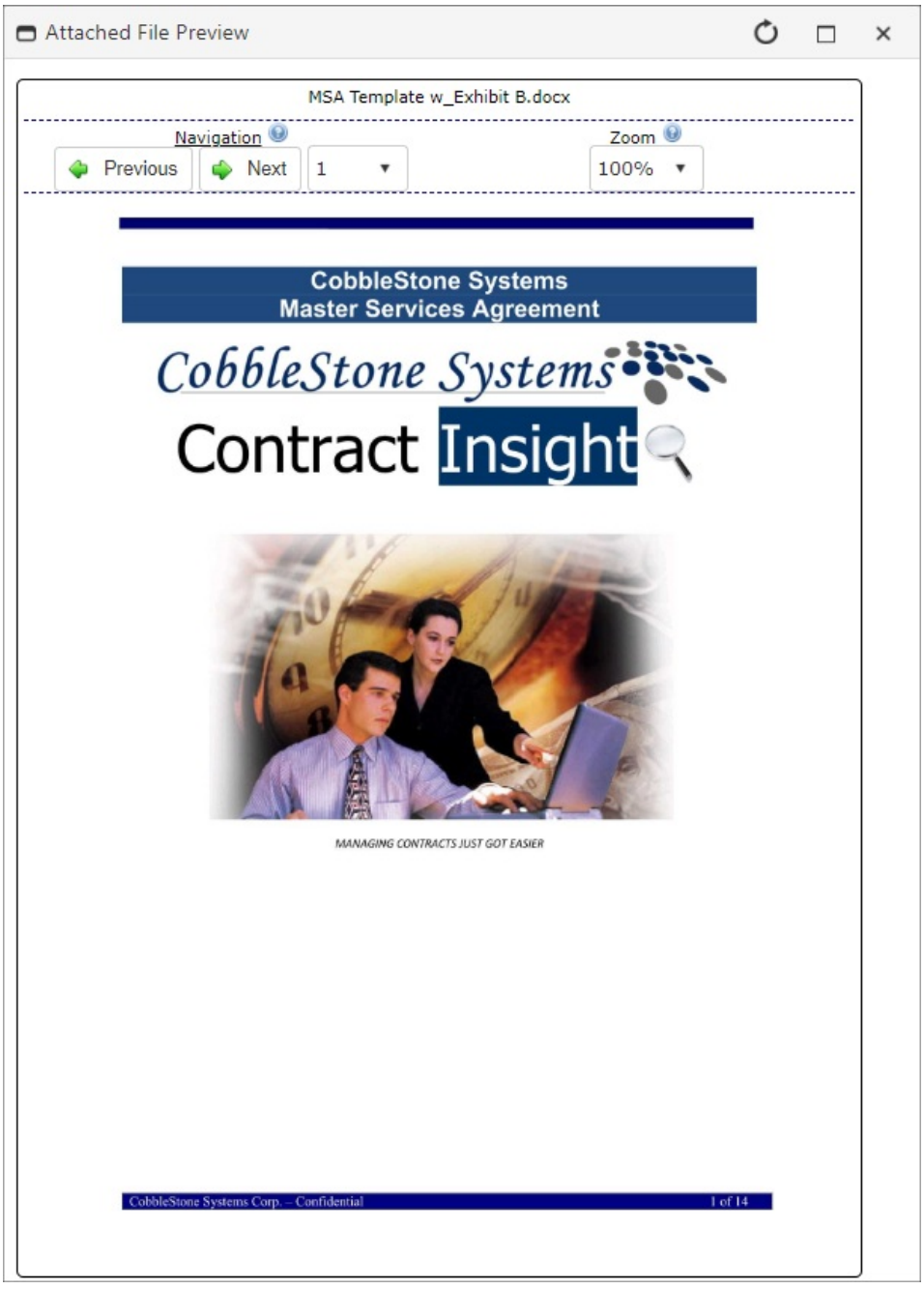
Review the Document(s)

1. For the desired document, click **Preview** or **Download** the file.

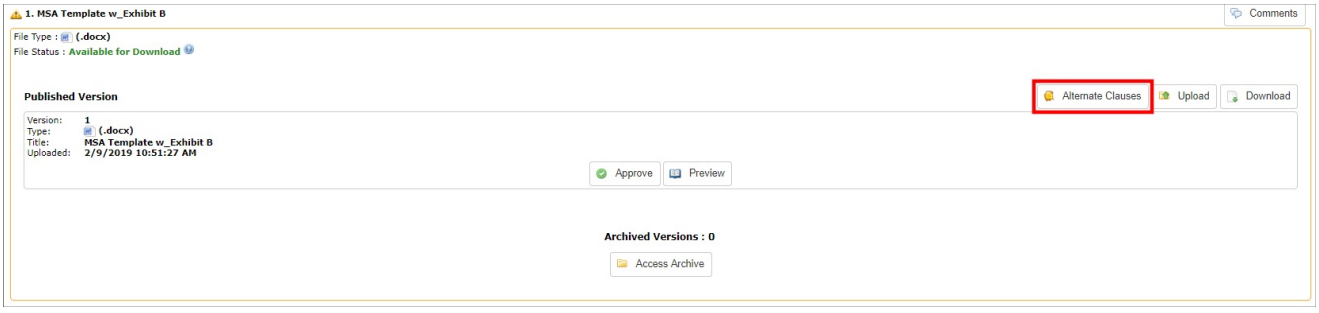


2. If previewing, pop-up window containing the document appears.

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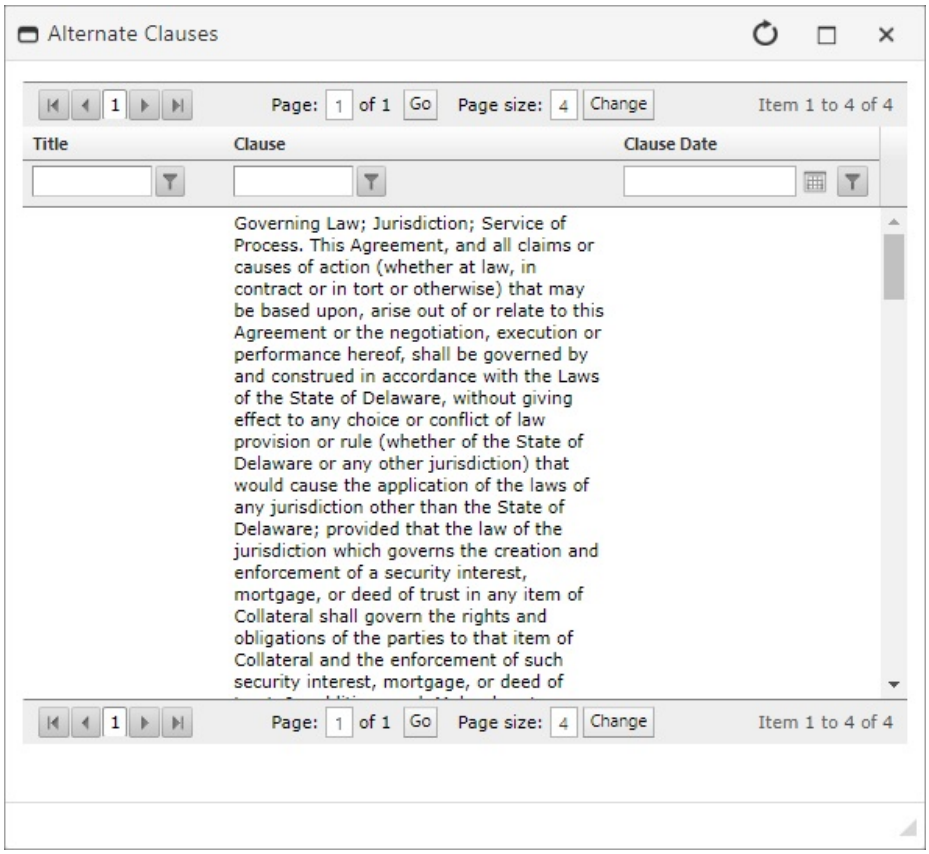


3. Review any **alternate clauses** if they have been assigned.

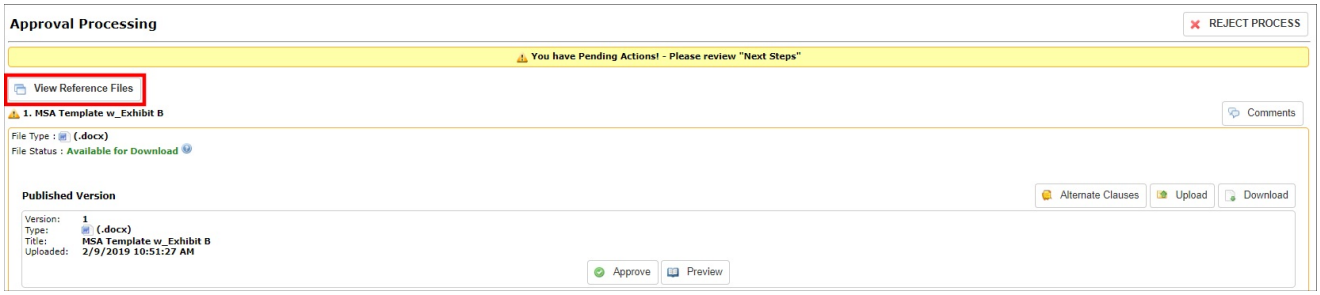


4. A pop-up window for the clause(s) displays.

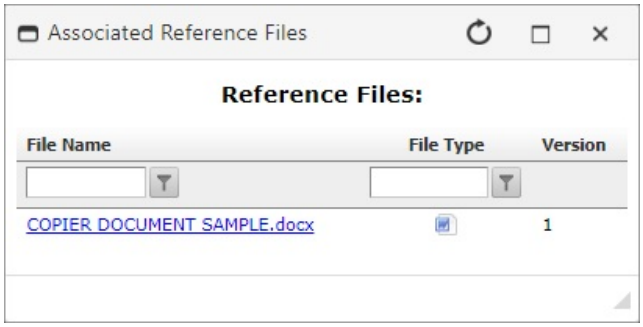
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5. Click **View Reference Files** if any files have been associated with the document in review and have been marked as reference files



6. A pop-up window with all reference files displays.

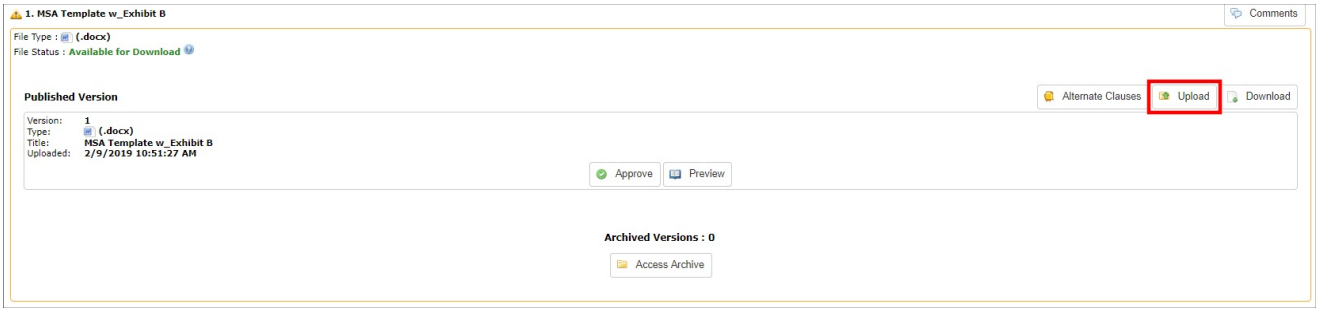


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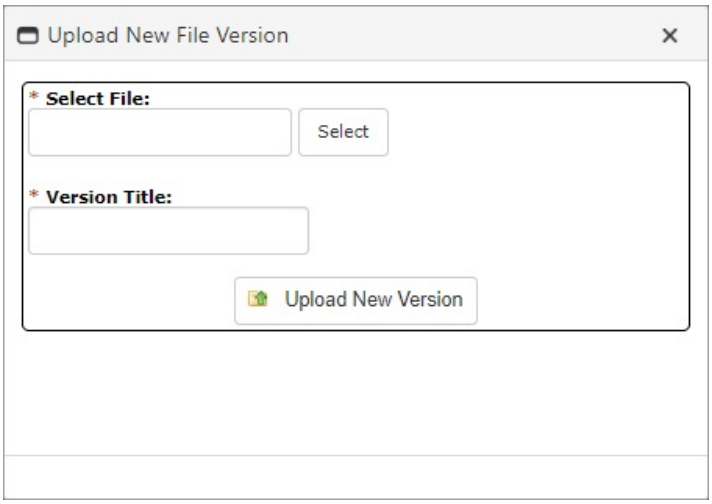
7. Click the document file name to download the reference file.

New Versions

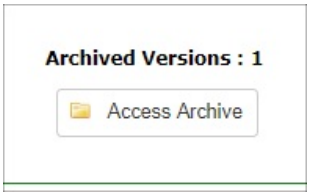
1. If changes are required, **upload** a new version of the document.



2. A pop-up window for selection of the new version displays.



3. Click **Access Archive** to review any older versions of the document.



4. A list of all previous versions displays.

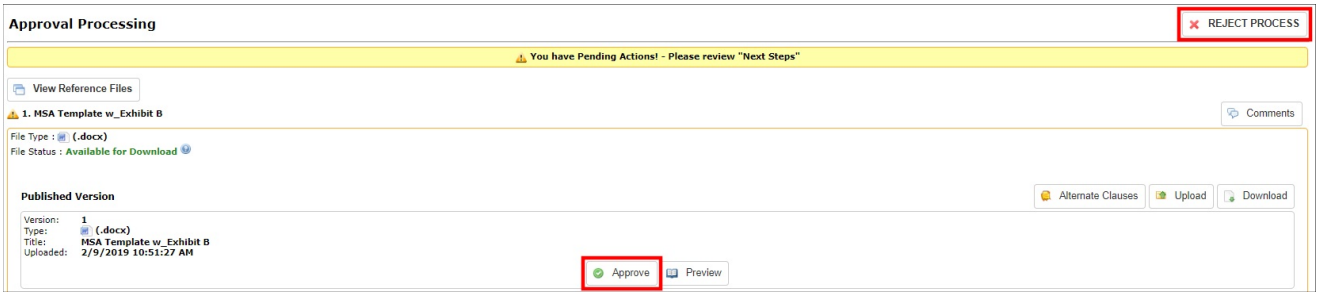
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5. Click the file name to download the archived version.

Approve or Reject

1. Click **Approve** to approve the document



2. Alternatively, click **Reject Process** to reject the process in whole.

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IntelliSign Overview

IntelliSign Overview

CobbleStone IntelliSign: Overview

The **Document Authoring Module** with Contract Insight also offers another way of electronically signing documents. This is our IntelliSign Process. This process does not require setting up signers the way the E-Signature Process does. In the following pages, we will look at managing and processing **Cobblestone IntelliSign**.

Note: When creating a document template, specify if the document created from the template is allowed to be IntelliSigned. This step takes place when Managing the Document Template to be merged.

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IntelliSign Process from Document Toolbox

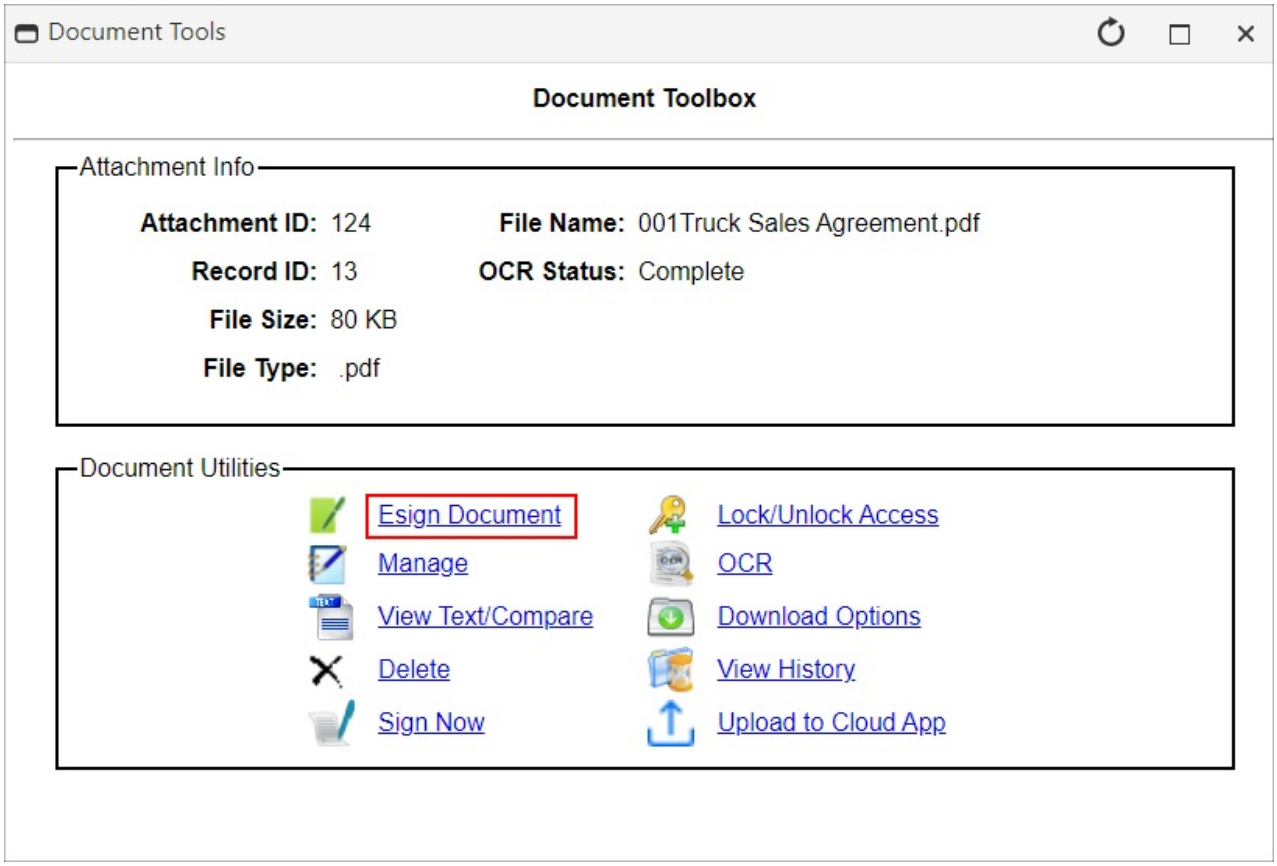
IntelliSign Process from Document Toolbox

CobbleStone IntelliSign: from Document Toolbox

From the **Contract/Request Details** screen, under the **Files/Attachments** section, a red toolbox next to each file is presented.



Click the **toolbox** icon. The option to **Esign the document** is present.



After clicking the link, the option to use the CobbleStone IntelliSign tool displays.

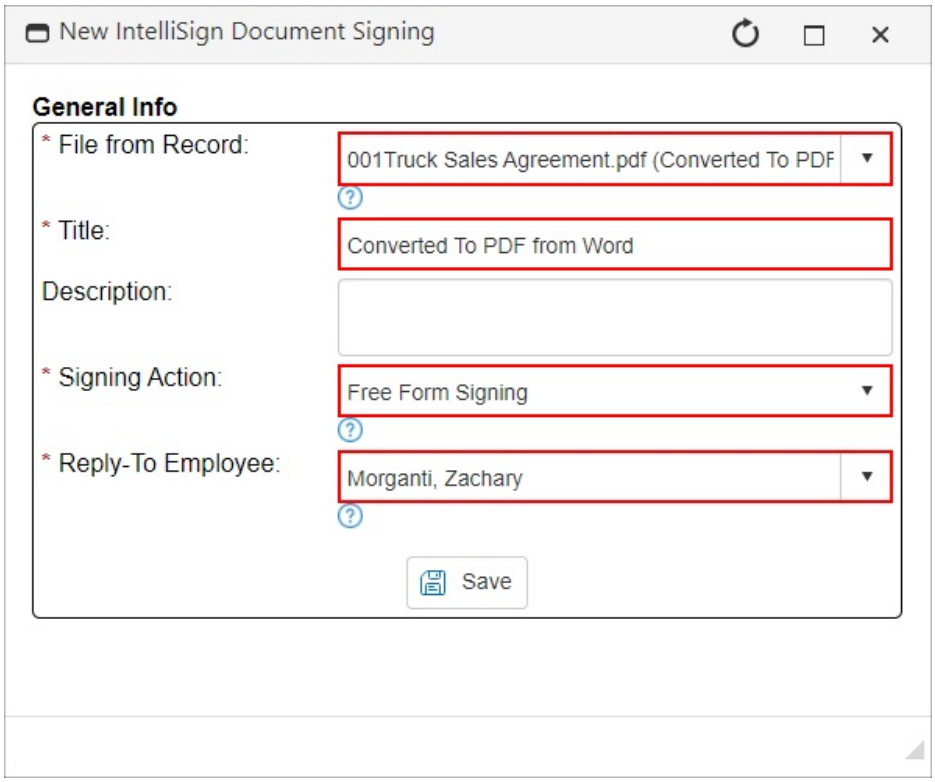
Note: An option for Adobe Sign and/or DocuSign is here as well. In order for this to function, a **Contract Insight Connection** module has to be purchased and then set up in the **Application Configuration** settings.

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Click **CobbleStone IntelliSign** to proceed.



Next, a pop-up window on which the option to select from among all files associated with the record displays. Select a file, title the process, indicate if signatures will be allowed anywhere on the document or if the signature areas will be specified. Lastly, designate the employee to oversee the process.



1. **File from Record** - determine which file will be electronically signed in this process.

Note: This will default to the file for which the **toolbox** icon was clicked.

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2. **Title -** title for this IntelliSign process

3. **Description -** brief description of the process (optional)

4. **Allow Sign Anywhere -** if signature placeholders will be set up for signers or if they can select where to sign

5. **Reply-To Employee -** the employee notified throughout the signature process for each action taken. (This will default to the user initiating the process. More employees/users can be assigned to be notified before beginning the process)

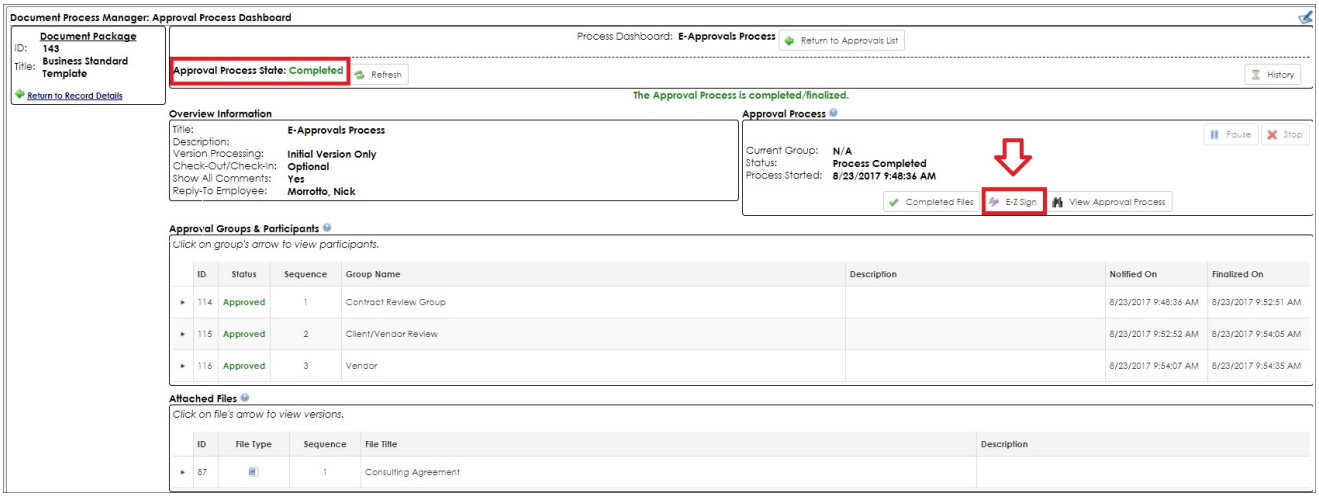
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IntelliSign Process from E-Approvals

IntelliSign Process from E-Approvals

CobbleStone IntelliSign: After E-Approval

Users can begin the **IntelliSign Process** from the **Completed E-Approval** Screen by clicking **IntelliSign**.



The user is given only one option of a file from which to choose. A title for the process must be supplied. A user must also indicate if signatures will be allowed anywhere on the document or if the signature areas will be specified. Lastly, a user must designate the employee to oversee the process.



1. **Select File** - determine the file to be electronically signed with the IntelliSign Process.

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Note: This should default to the file that has been approved in the approval process.

2. **Title** - a title for this IntelliSign process

3. **Description** - A brief description of the process (optional)

4. **Allow Sign Anywhere** - This determines if signature placeholders will be set up for signers or if they can select where to sign.

5. **Reply-To Employee** - This employee who will be notified throughout the signature process for each action taken. (This will default to the user initiating the process. More employees/users can be assigned to be notified before beginning the process)

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IntelliSign Process from Record Details

IntelliSign Process from Record Details

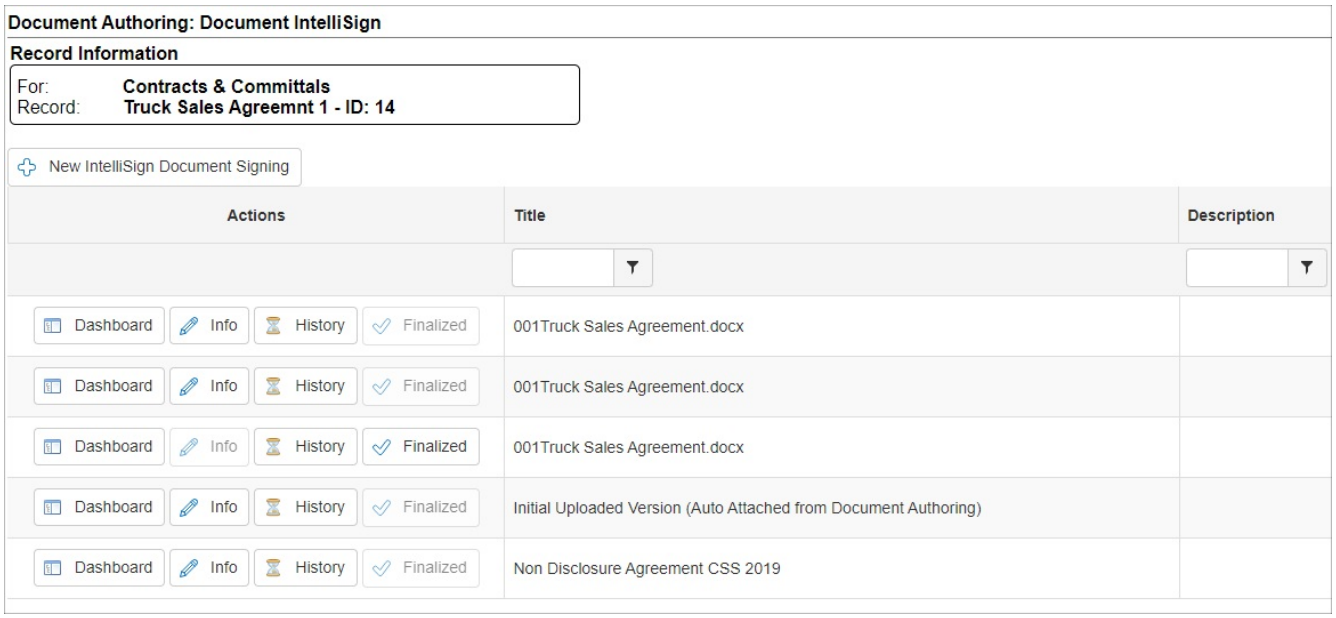
Cobblestone IntelliSign: from Record Details

Click **CobbleStone IntelliSign** on the side menu of the **Record Details screen** to open the **IntelliSign portal**.

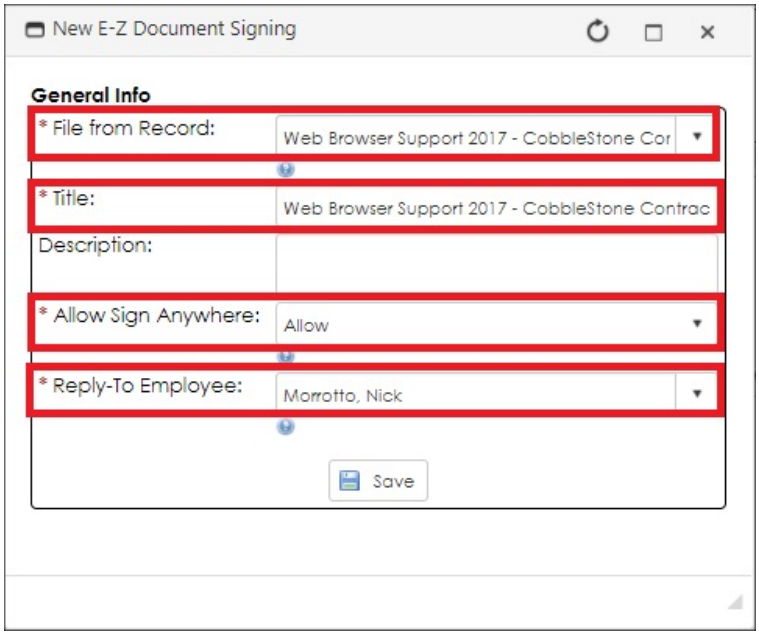


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Begin a New **IntelliSign Process** by clicking **New IntelliSign Document Signing**.



A pop-up window displays and options of all the files associated with the record display. Select a file, title the process, and determine if signatures will be allowed anywhere on the document or if the signature areas will be specified. Finally, indicate the employee to oversee the process.



1. **File from Record -** This is where you users determine what file will be electronically signed with the IntelliSign Process.

Note: Select the file to sign electronically from the available files on the record details screen.

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2. **Title -** title for this IntelliSign process

3. **Description -** brief description of the process (optional)

4. **Allow Sign Anywhere -** if signature placeholders will be set up for signers or if the signers can select where to sign.

5. **Reply-To Employee -** the employee notified throughout the signature process for each action taken. (This defaults to the user initiating the process. More employees/users can be assigned to be notified before beginning the process)

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IntelliSign Process from Standard Packages

IntelliSign Process from Standard Packages

Cobblestone IntelliSign Process: from Standard Packages

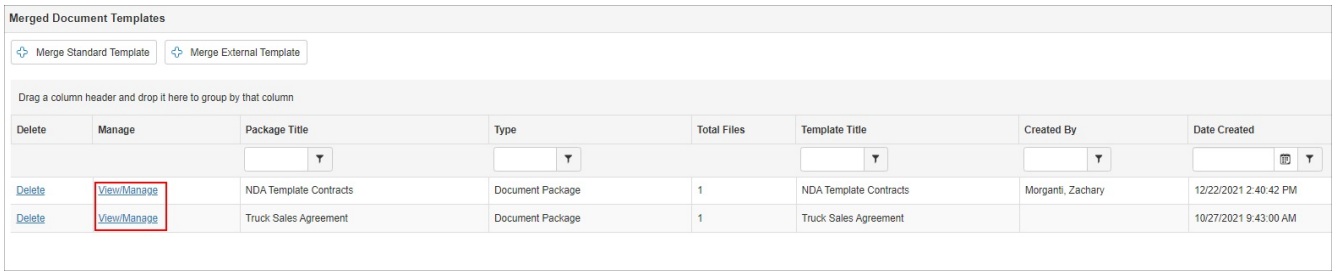
On the side menu of the of the **record details** screen, click **Standard Templates**.



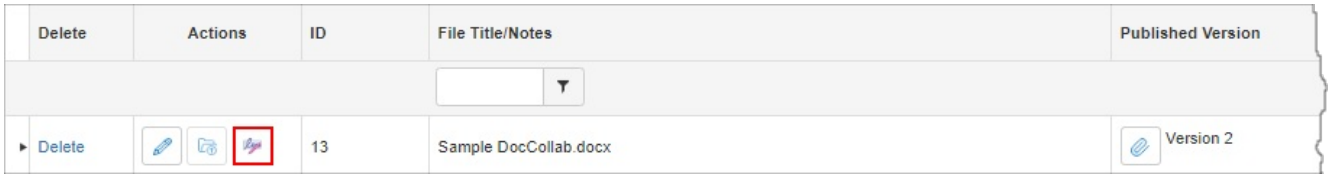
The user is taken to a list of the document packages created for the record. Click **View/Manage** for the document packages

Note: IntelliSign has to be allowed for the document package to sign the document using IntelliSign.

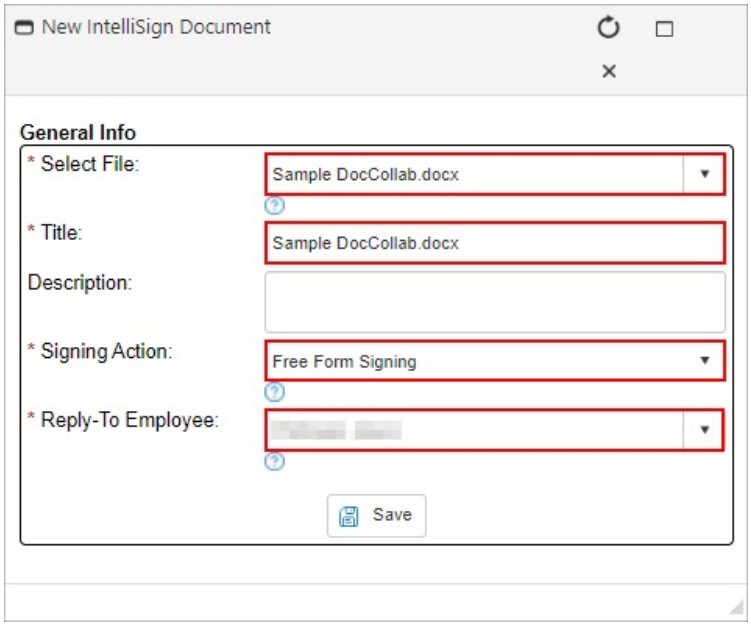
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The next screen presents an option to **IntelliSign** a document from that document package.



Title the Process and designate if signatures are allowed anywhere on the document or if the signature areas will be specified. Lastly, indicate the employee to oversee the process.



1. **Select File -** determine what file will be electronically signed with the IntelliSign Process.

Note: The file defaults to the file the user is currently accessing with the generated document package.

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2. **Title -** title for this IntelliSign process

3. **Description -** brief description of the process (optional)

4. **Allow Sign Anywhere -** if signature placeholders will be set up for signers or if they can select where to sign

5. **Reply-To Employee -** the employee notified throughout the signature process for each action taken. (This defaults to the user initiating the process. More employees/users can be assigned to be notified before beginning the process)

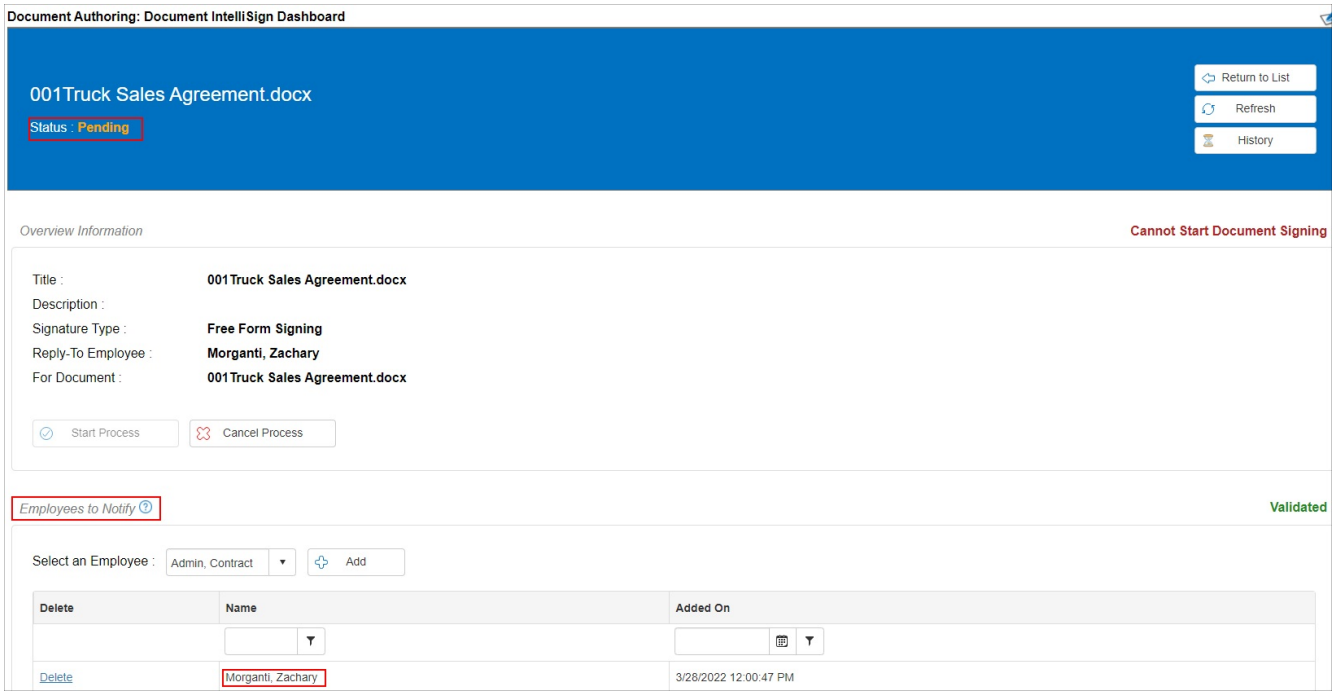
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Starting an IntelliSign Process

Starting an IntelliSign Process

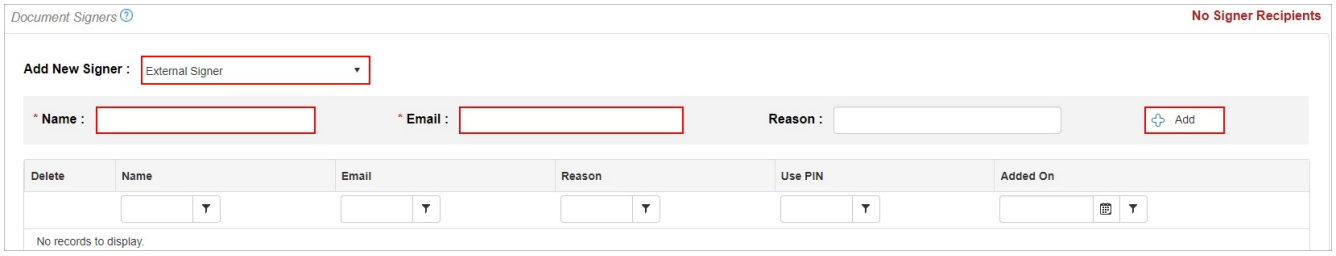
Processing a Cobblestone IntelliSign Process

With all four of the previous options of how to begin an **IntelliSign Process** covered (From a E-Approvals, Record Details, Document Toolbox and Standard Packages), the next step follows the picture below.

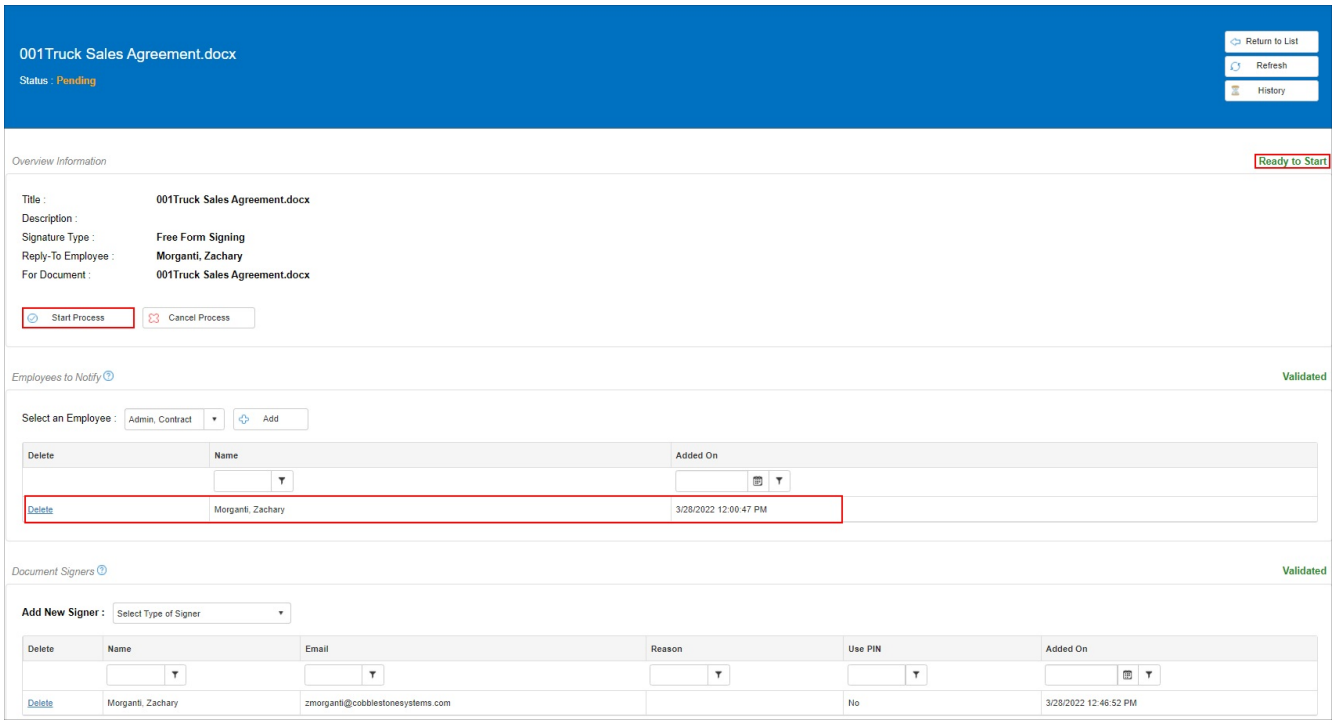


The process cannot be started until certain actions are performed. The signers for the document need to be specified (name and email address of the participant(s)). The reason is optional.

After adding all of the participants, signature placeholders need to be set.



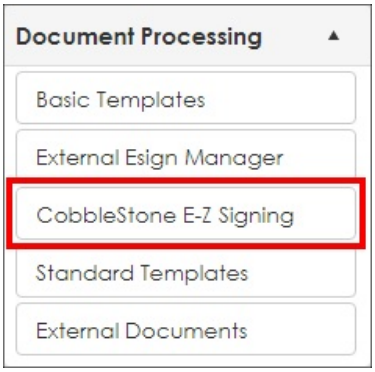
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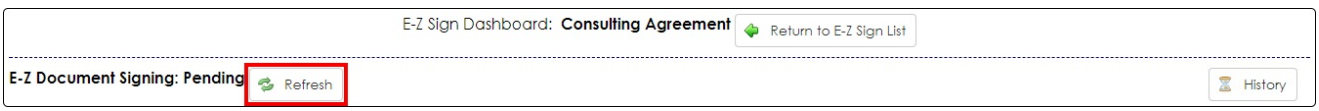
Once all of the steps are validated, the process follows the steps of Accessing Document Collaboration Gateway and Signing Documents.

To Return to the Dashboard

After initiating the signing process, return to the signing dashboard by clicking **CobbleStone IntelliSigning** on the document's side menu.



To view updates while the dashboard is open, click **Refresh**.

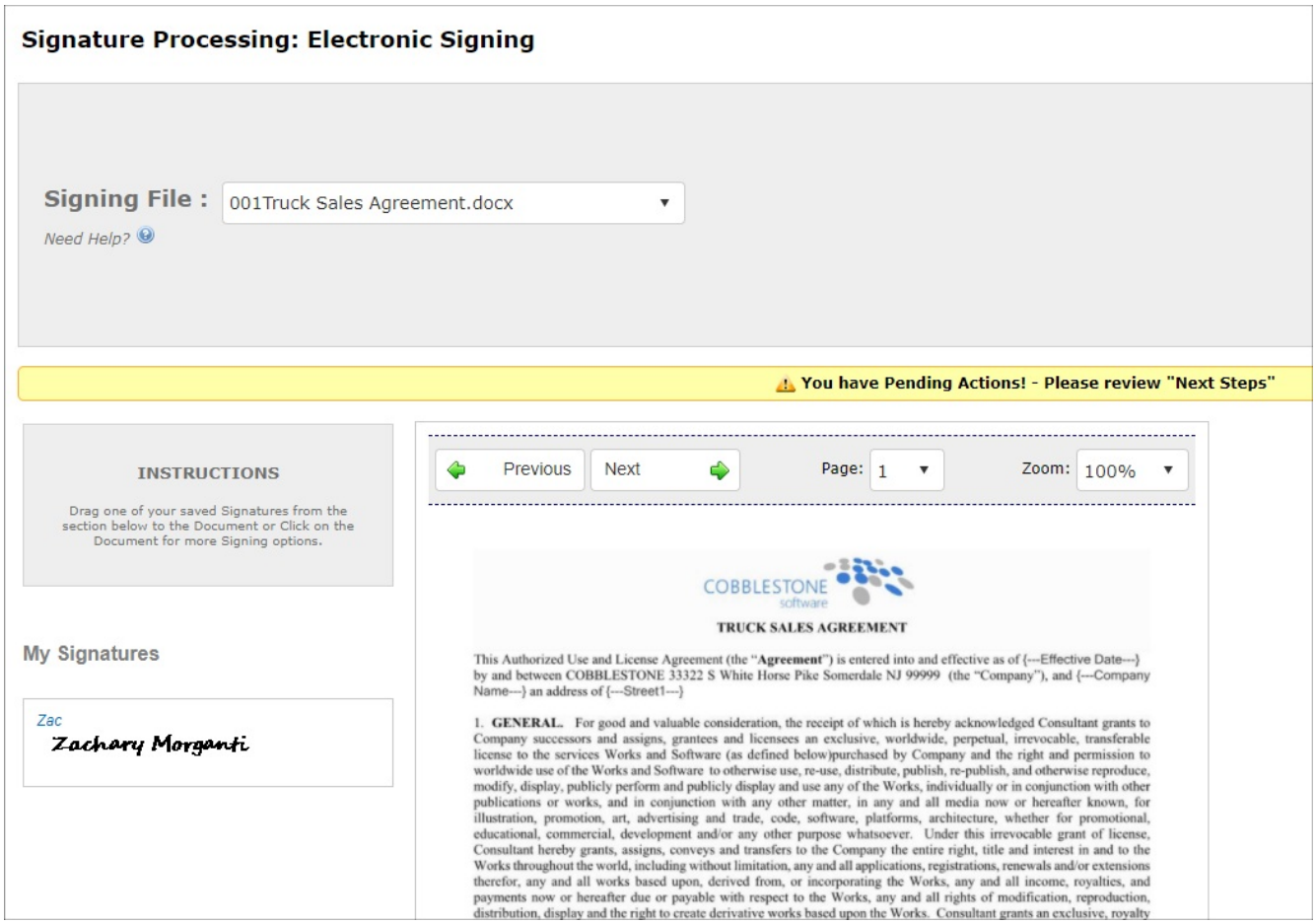


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INTERNAL SIGNING COBBLESTONE QUICK-E-SIGN

This is a very useful feature for users who want to sign a document quickly. Users can now sign a document right from the Contract Document Toolbox. If the system has the IntelliSign module installed, then you can sign any PDF attachment right from the Document Toolbox.

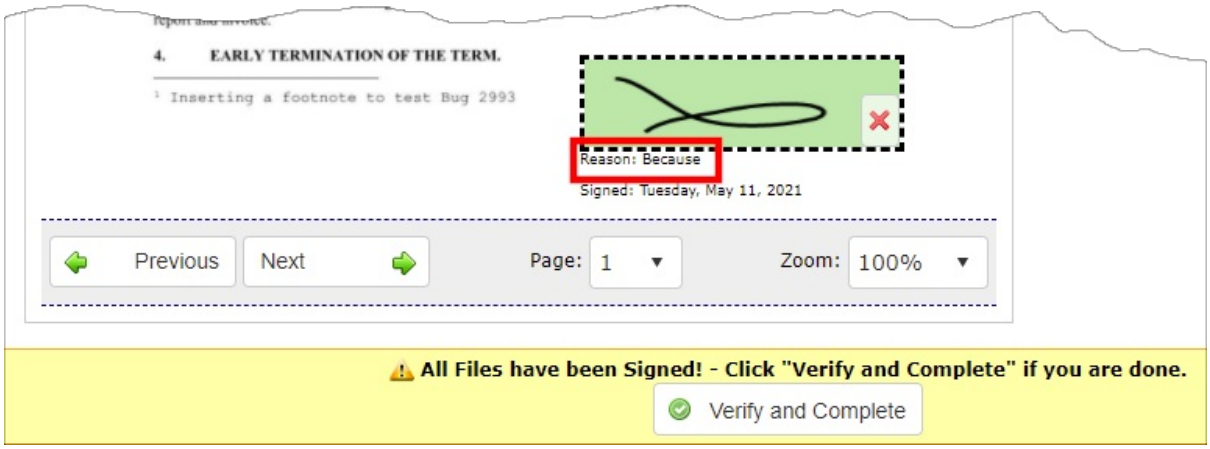
To use this feature, go to any Contract record, click on the Toolbox icon near any attached file and click on the Sign Now link. This will open up the Quick-E-Sign Portal right inside Contract Insight and users can sign the Document. If the user has any saved signatures, it will show up on the left side where the user can then drag and drop the signature into the document. Or the User can click on the location where they want to sign and choose one of the 5 Signature placeholder types (Saved Signatures, Draw new Signature, Type a Signature, Initials, and Date). After you are done signing, click on the Save and Attach button to save the new signed document as a PDF and attach it to the Contract Record.



Note: If adding a reason, that reason displays on the signing portal.



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Setting Signature Place Holders

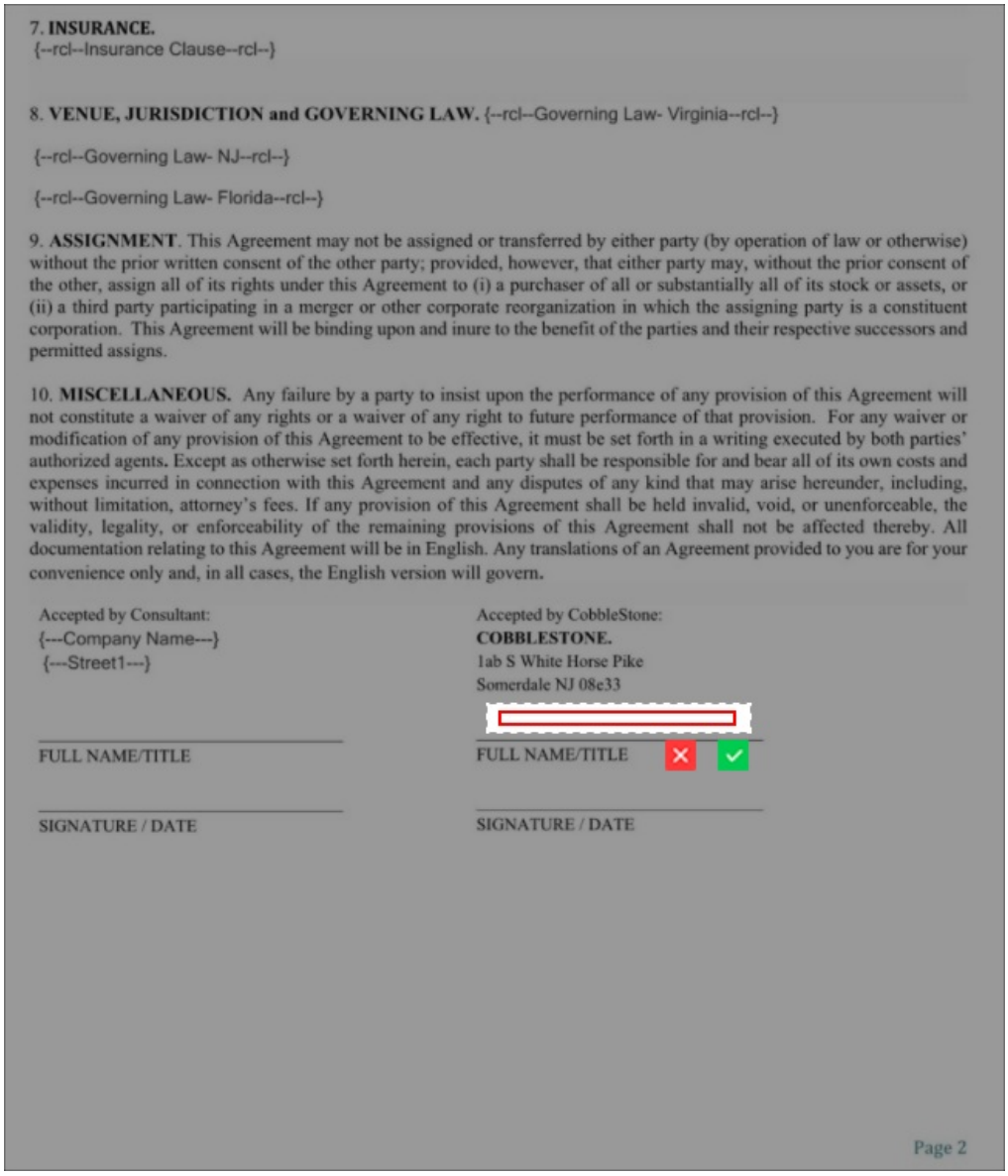
Setting Signature Place Holders

CobbleStone IntelliSign: Setting Signature Place Holders

Click **Set eSignature Locations** to open the **Document Collaboration Gateway**.

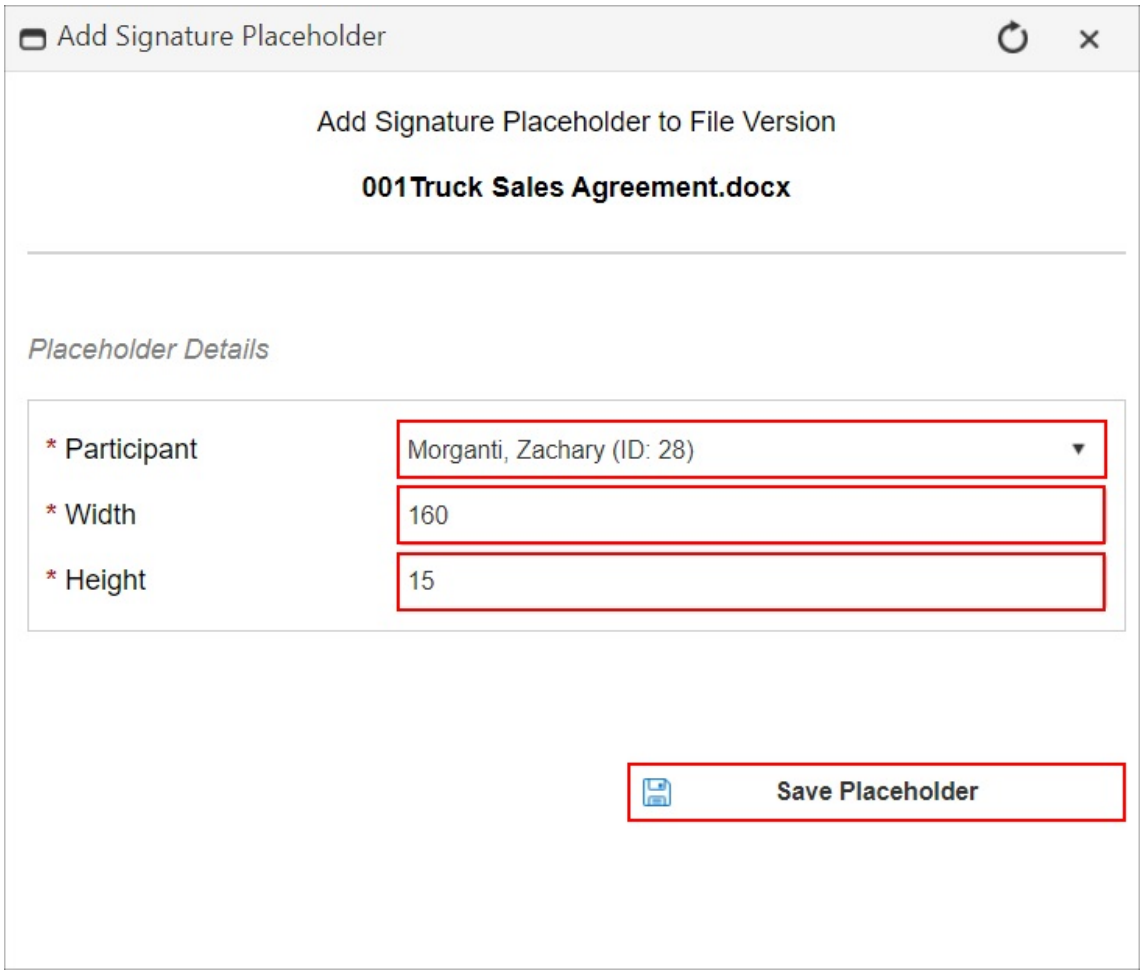


Once in the gateway, navigate to the position where the place holders should be set. Use the top of the pointing finger to determine where the signature box is to be placed.



Once a click is made, a pop-up window displays.

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On this screen, determine the participant who will use this placeholder. The options are from the list of signers specified before the IntelliSign Process or E-Signature Process was started. Optionally, users can set the width and height of the placeholder can be set.

Note: The recommended settings for the width and the height of the signature box are **150W x 25H**.

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7. **INSURANCE.**
{--rcl--Insurance Clause--rcl--}

8. **VENUE, JURISDICTION and GOVERNING LAW.** {--rcl--Governing Law- Virginia--rcl--}

{--rcl--Governing Law- NJ--rcl--}

{--rcl--Governing Law- Florida--rcl--}

9. **ASSIGNMENT**. This Agreement may not be assigned or transferred by either party (by operation of law or otherwise) without the prior written consent of the other party; provided, however, that either party may, without the prior consent of the other, assign all of its rights under this Agreement to (i) a purchaser of all or substantially all of its stock or assets, or (ii) a third party participating in a merger or other corporate reorganization in which the assigning party is a constituent corporation. This Agreement will be binding upon and inure to the benefit of the parties and their respective successors and permitted assigns.

10. **MISCELLANEOUS.** Any failure by a party to insist upon the performance of any provision of this Agreement will not constitute a waiver of any rights or a waiver of any right to future performance of that provision. For any waiver or modification of any provision of this Agreement to be effective, it must be set forth in a writing executed by both parties' authorized agents. Except as otherwise set forth herein, each party shall be responsible for and bear all of its own costs and expenses incurred in connection with this Agreement and any disputes of any kind that may arise hereunder, including, without limitation, attorney's fees. If any provision of this Agreement shall be held invalid, void, or unenforceable, the validity, legality, or enforceability of the remaining provisions of this Agreement shall not be affected thereby. All documentation relating to this Agreement will be in English. Any translations of an Agreement provided to you are for your convenience only and, in all cases, the English version will govern.

Accepted by Consultant:
{---Company Name---}
{---Street1---}

FULL NAME/TITLE

SIGNATURE / DATE

Accepted by CobbleStone:
COBBLESTONE.
1ab S White Horse Pike
Somerdale NJ 08e33

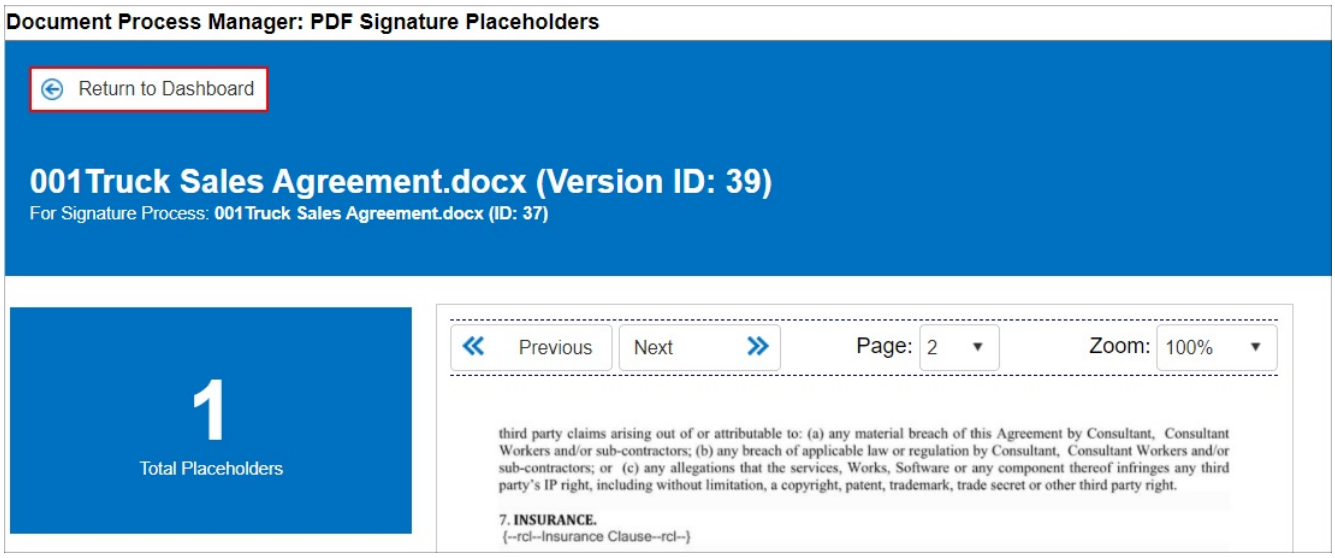
1 AME/TITLE

SIGNATURE / DATE

Page 2

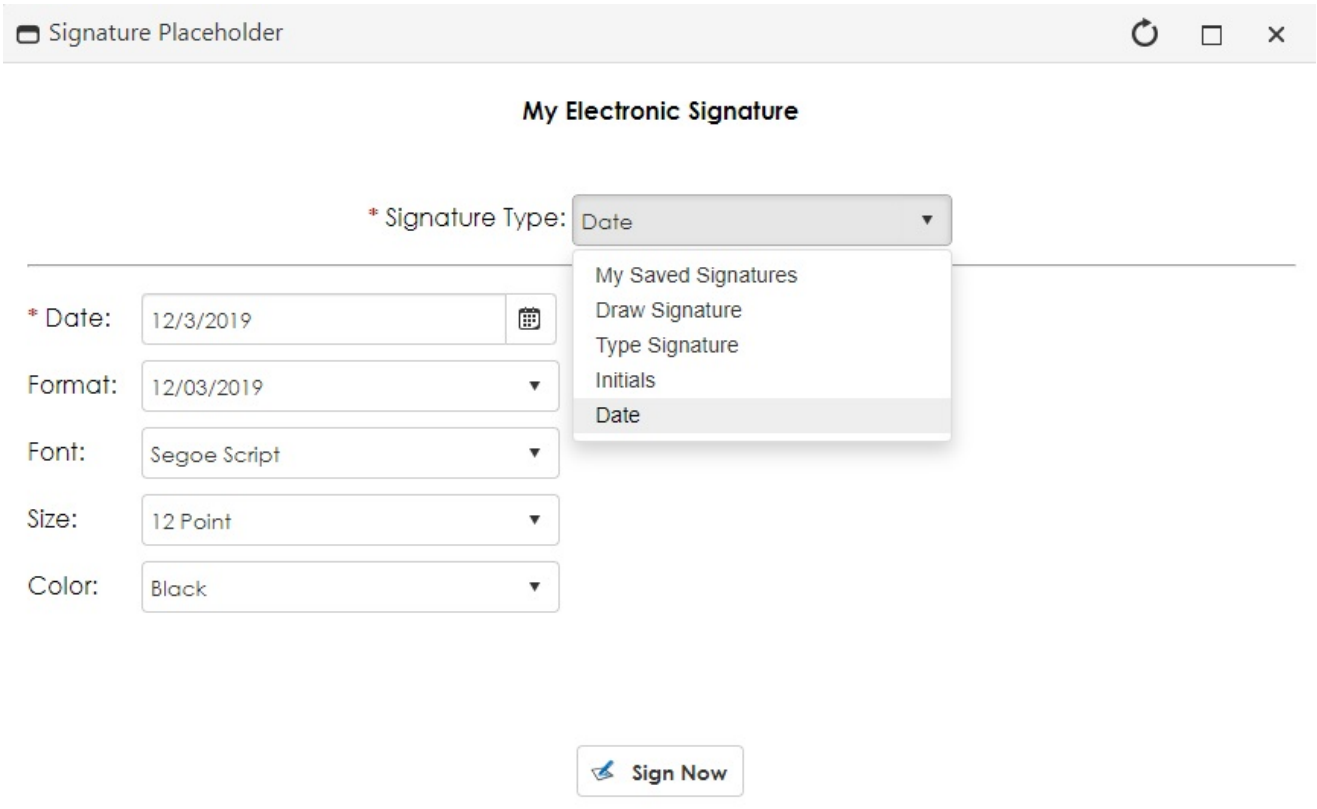
Once the placeholder is set, click **Return** to get back to the dashboard and then begin the signature process if all other criteria are completed as well.

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ADDITIONAL PLACEHOLDER TYPES FOR E-SIGNING

1) My Saved Signatures : Previously saved signatures by a system user.
2) Draw Signature : Draw a new signature.
3) Type Signature : Type in text as a signature.
4) Initials : Type in your Initials (limited to 3 characters max).
5) Date : Insert a Date signature (has multiple format options).



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Purchase Orders Overview

Purchase Orders Overview

Purchase Orders: Overview

CobbleStone Systems Corp. offers a Purchase Order Management Software (POMS) Module As an optional add-on module. Below is a general overview of the Purchase Order Management Software features.

About Purchase Orders

Typically, a purchase order (PO) is a commercial document issued by a buyer to a seller, indicating items of the agreed-to order with item details, quantities, and agreed prices for products or services. Sending a purchase order to a supplier constitutes a legal offer to buy products or services and for the buyer to pay for such items ordered. Acceptance of a purchase order by a seller usually forms an agreement between the two parties and may be further substantiated by a contract between the buyer and seller. POs are used to control the purchasing of products and services of supplies for most organizations. With CobbleStone Software offerings, organizations can now more easily control Purchase Orders, Solicitation & Procurement, Contract Processing, and Vendor Ratings. This helps organizations with compliance, better management of assets & resources, and a more consolidated method of managing business processes.

Why use a purchase order system?

With a consolidated system that manages the procurement process of solicitations and offerings, contracts, and purchase orders, an organization can easily automate a typically laborious process. The CobbleStone Purchase Order Management Software will enable organizations to easily create and manage Purchase Orders, allow buyers to create and manage PO line items, related contracts & documents, communicate via email and traditional forms the PO document, collaborate with employees on purchase requests, and track related activities. CobbleStone's Purchase Order Management Software helps purchasing agents to manage incoming orders and pending orders as well as easily report on items.

Electronic Purchase Orders and a Consolidated System

As business trends continue to move forward, many purchase orders are no longer paper-based, but rather are electronic and communicated via e-mail and over the Internet. With CobbleStone, procurement managers can issue electronic purchase orders (and traditional documents) as required by the organization. In addition, Purchase Orders can be issued as a standalone order or linked to the supporting contracts. This enables users to better track the total amount of Purchase Orders issued against one or many contracts. This improves the financial management process of an organization.

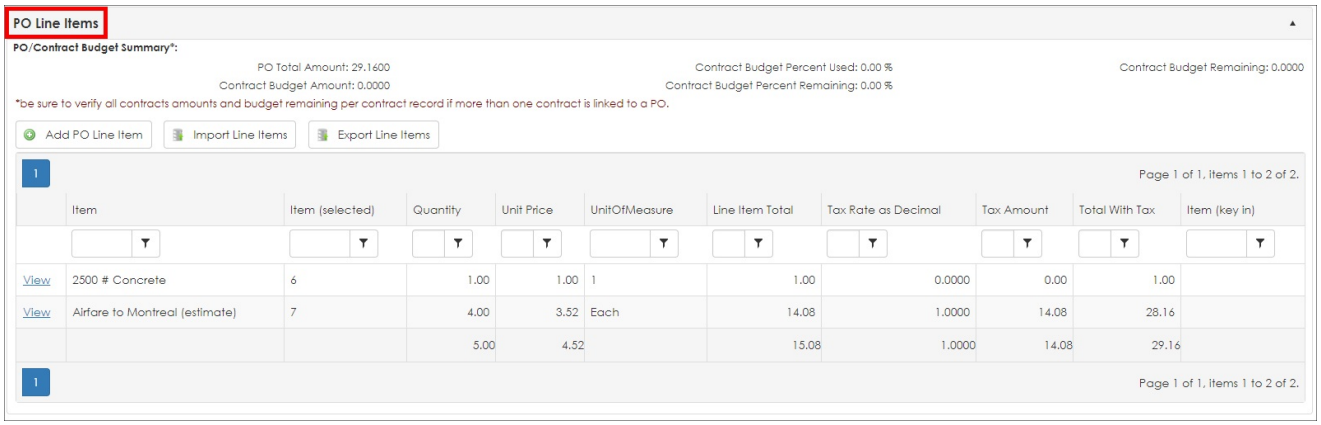
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Manage PO Fields (PO Details Screen)

Manage PO Fields (PO Line Item Screen)

Purchase Orders: Manage Line Item Fields

Contract Insight allows System Administrators as well as users with the proper permissions to manage the fields for the Purchase Order Line Items section, the same as they would for a grid such as the **Price/Cost Schedule** on the **Contract Details** screen.



To manage the fields displayed for the Purchase Order Line Items section

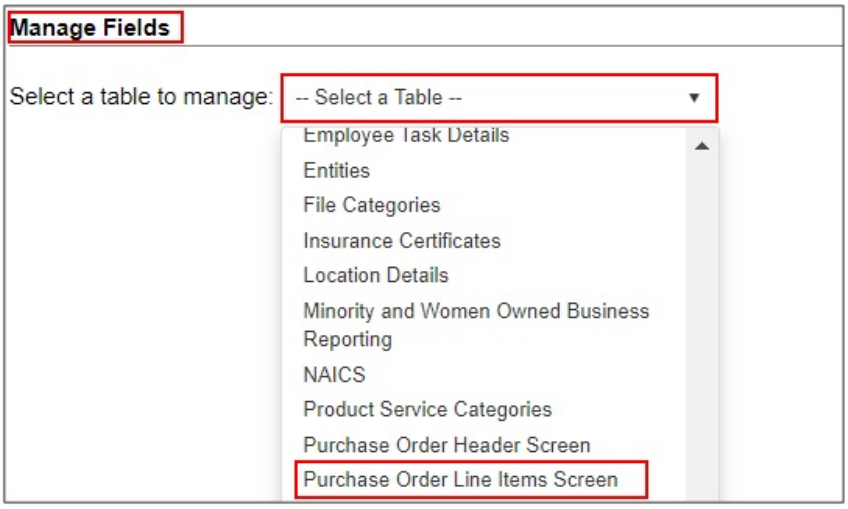
Navigate to **Manage/Setup** > **Field Manager** > **Manage Fields**.

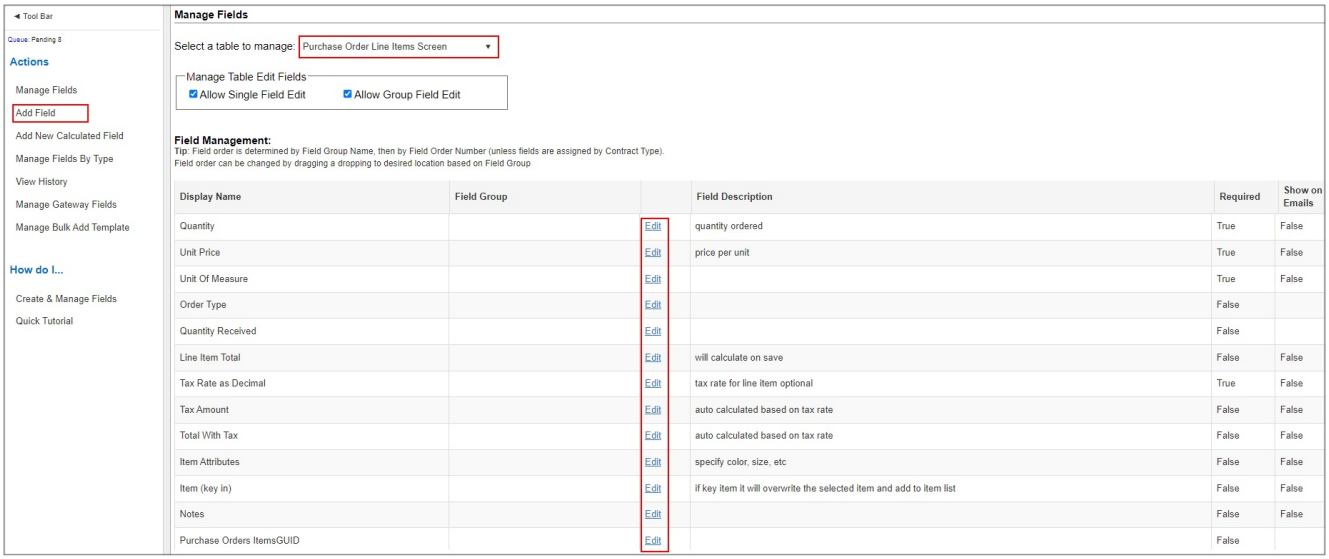
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Select the **Purchase Order Line Items Screen** option from the drop-down menu to display a list of all fields on the Purchase Order Line Items screen.

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Please see the Create User-Defined/Custom Fields Wiki page for more information on how to create new **User-defined fields**.

Please see the Managing and Editing Fields Wiki page for more information on how to manage and edit fields for a screen.

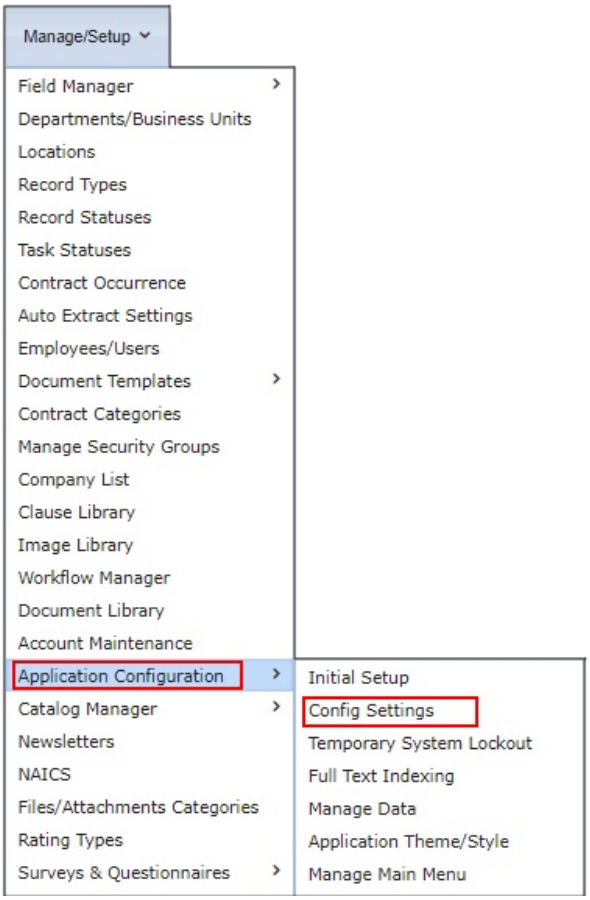
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App Config: Purchase Orders

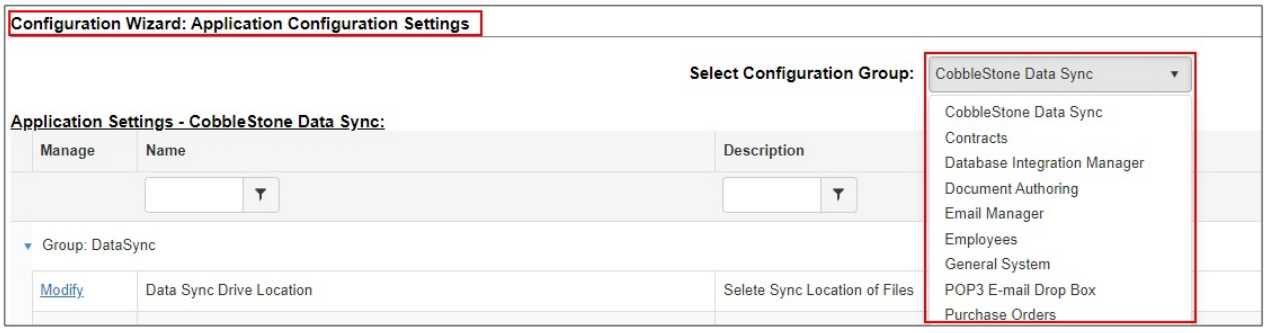
App Config: Purchase Orders

Purchase Orders: Application Configuration Group

To access the Application Settings for Purchase Orders, log in to Contract Insight as a System Administrator and navigate to **Manage/Setup - Application Configuration - App Config**. The **Configuration Wizard: Application Configuration** screen displays.

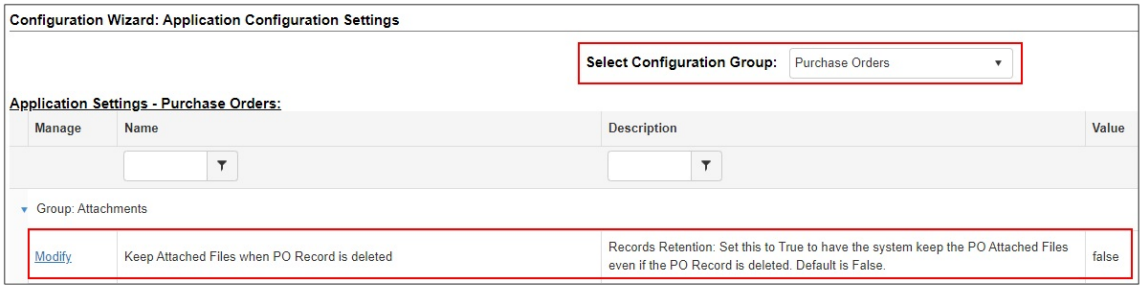


Select the **Purchase Orders** Configuration Group from the drop-down menu provided.



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The Application Setting for whether to keep the attached files for a Purchase Order if the Purchase Order Record is deleted should be set to True to retain the files for a PO if the PO is deleted.



Note: The default setting is False and should be changed if you wish to keep the files/attachments for deleted Purchase Orders.

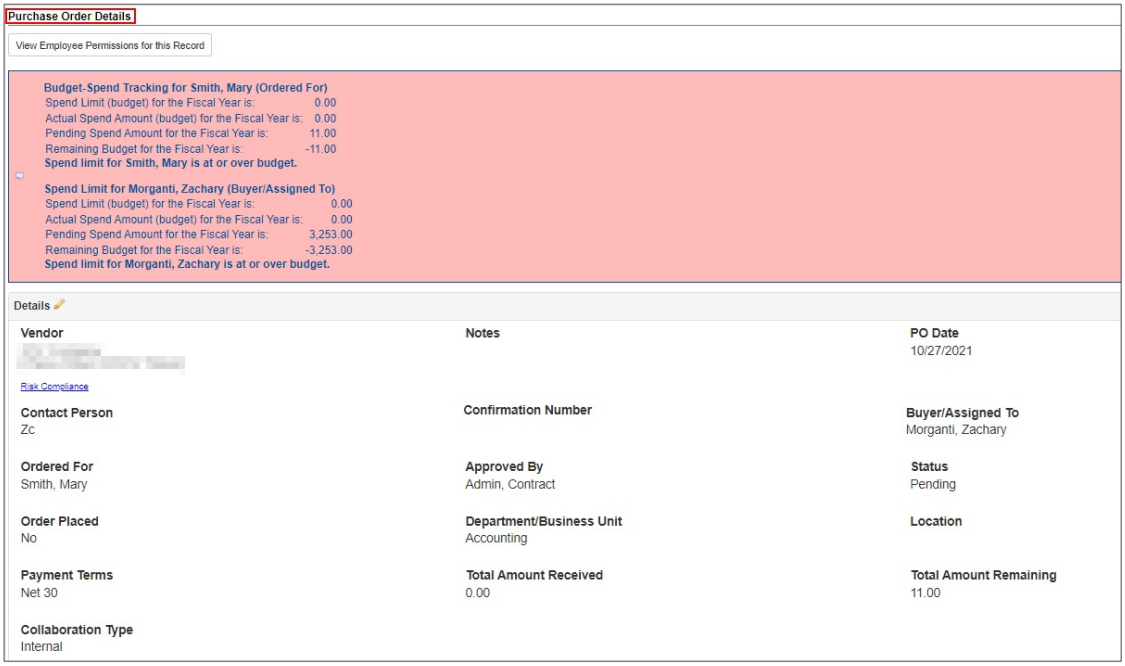
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Manage PO Fields (PO Line Item Screen)

Manage PO Fields (PO Details Screen)

Purchase Orders: Manage Fields

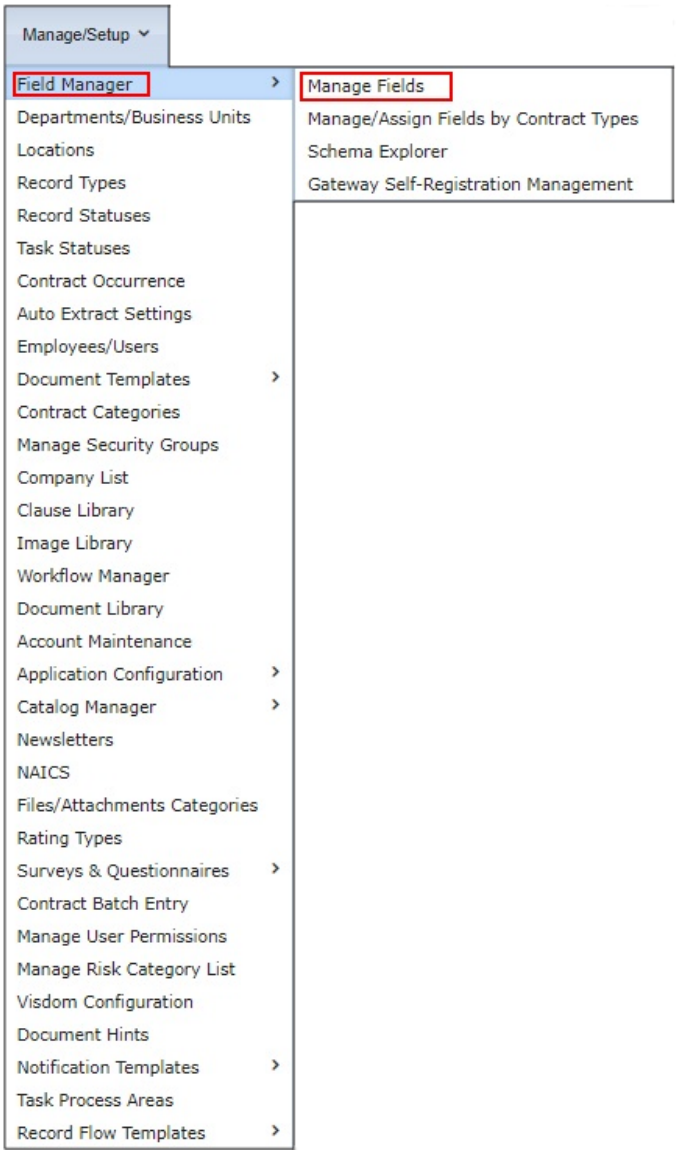
Contract Insight allows System Administrators as well as users with the proper permissions to manage the fields for the **Purchase Order Details** screen (also called the **Header Screen**), the same as they would for a screen such as the **Contract Details** screen.



To manage the fields displayed on the Purchase Order Details screen

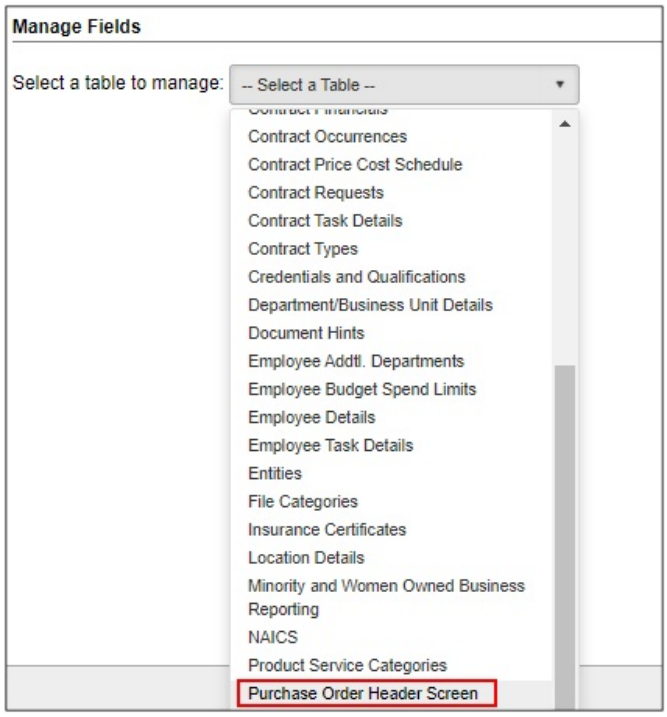
Navigate to **Manage/Setup > Field Manager > Manage Fields**.

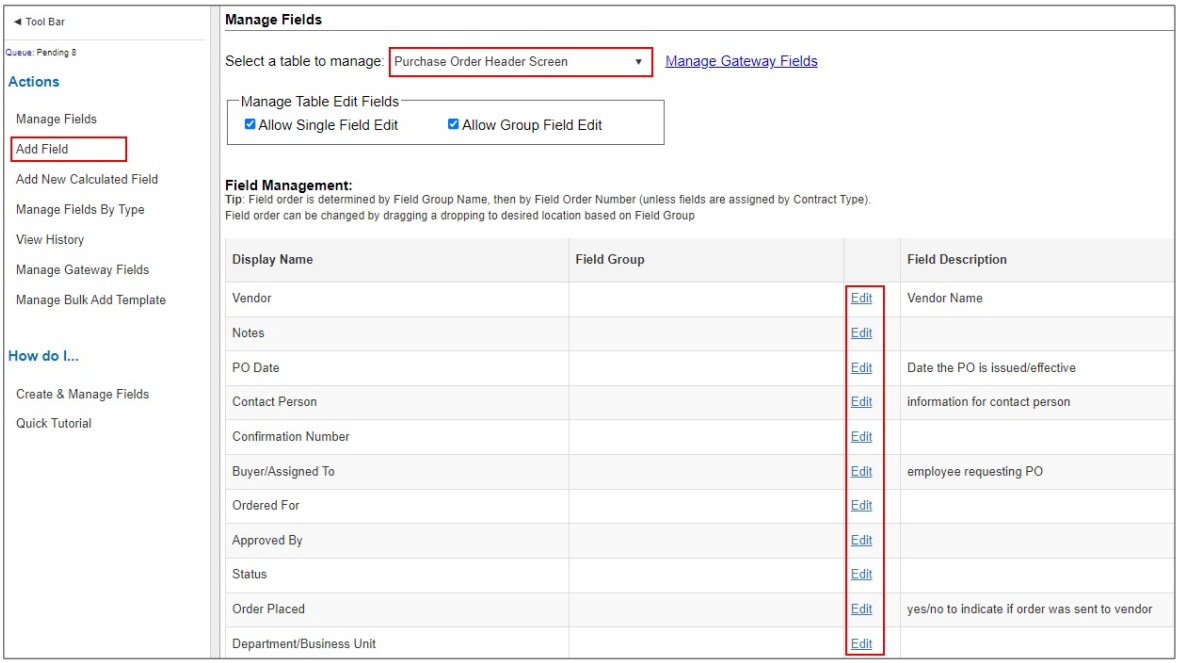
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Next, select the **Purchase Order Header Screen** option from the drop-down menu to display a list of all fields on the **Purchase Order Details** screen.

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Please see the Create User-Defined/Custom Fields Wiki page for more information on how to create new **User-defined fields**.

Please see the Managing and Editing Fields Wiki page for more information on how to manage and edit fields for a screen.

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Manage PO Template

Manage PO Template

Purchase Orders: Template Management

This functionality has been replaced by the Advanced Template Management module. See the Document Template Management: Overview Wiki page and/or the Document Templates: Generated Document Packages Wiki page.

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Find/Search Purchase Orders

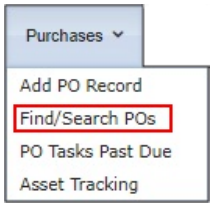
Find/Search Purchase Orders

Purchase Orders: Find/Search

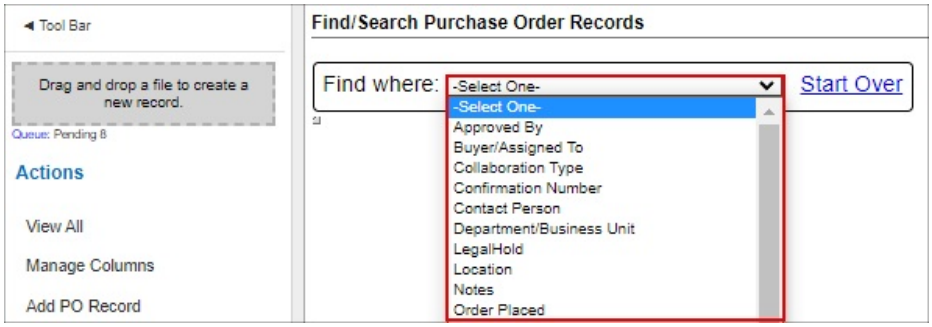
The **Find/Search POs** feature allows users to perform field-level searching and reporting for Purchase Orders in your Contract Insight application. This search option is helpful when searching for something such as all POs to which an employee is assigned.

To Navigate to the Find/Search POs Screen

Navigate to **Purchase Orders** > **Find/Search POs**.

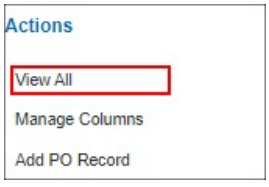


The **Find/Search** screen for Purchase Orders displays where users can either view all Purchase Orders in the system or perform a field-level search for a specific value populated in a PO field.

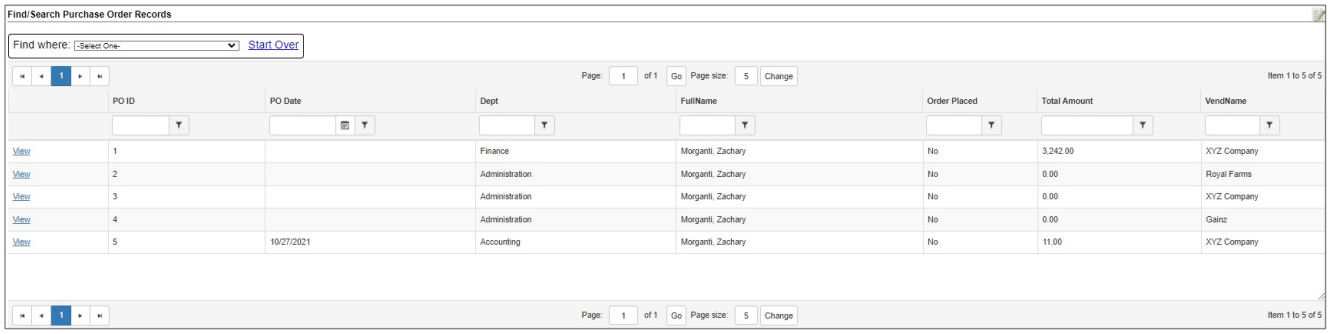


To View All Purchase Orders in your CobbleStone Application

On the side menu of the **Find/Search** screen, click **View All** link to have a grid display listing all Purchase Orders in the Contract Insight application.

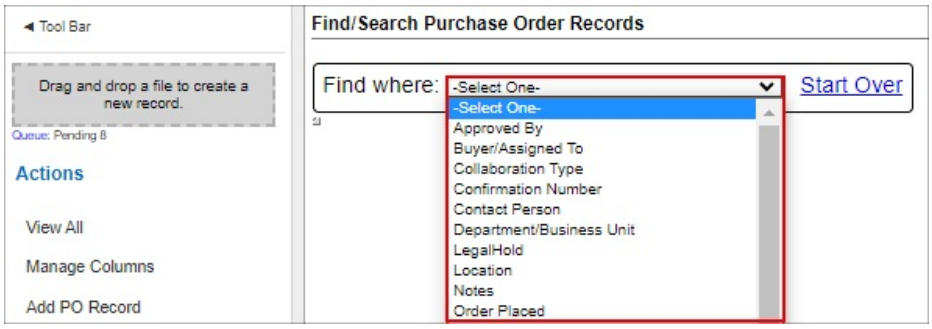


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Field-Level Searching

To perform a field-level search on the **Find/Search** screen for Purchase Orders, click the **Find Where** drop-down and select the field on the Purchase Order Details screen by which to search.



Depending on the selected field's field type, different options display:

- **For Drop Down Fields:** a second drop down will show to select the value you would like to search where the field equals a value.



- **For Text Entered Fields** (such as Text Box, Currency, Integer, Decimal Field Types): you will be asked to enter text into a text box where you can find where the selected field **Is Like**

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- **For Date fields:** enter/select (using the calendar icon) two dates within to search via **Date is Between**.



NOTE: If a **Find Where** field is selected, **View All** is not available; click **Start Over** before clicking **View All**.

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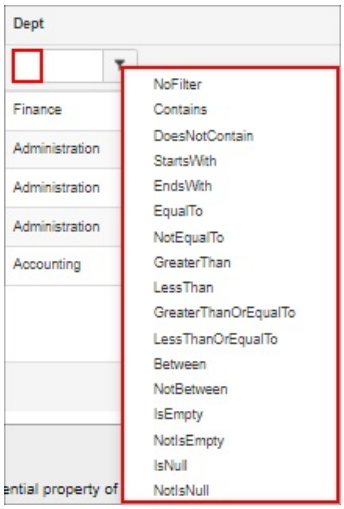
Filtering & Sorting Find/Search POs List

Filtering & Sorting Find/Search POs List

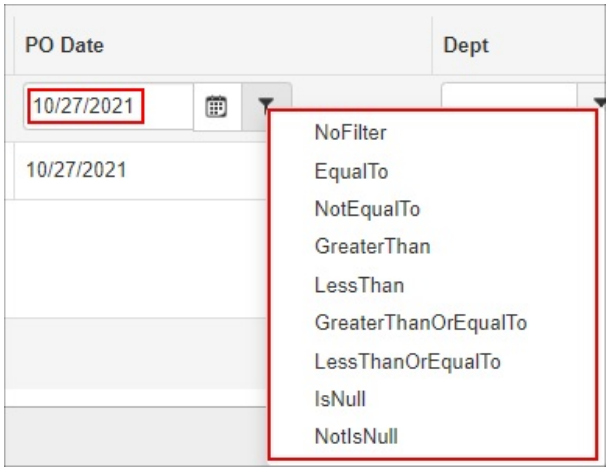
Purchase Orders: Filtering & Sorting the Find/Search POs Screen

The **Find/Search POs** screen can be filtered by entering the filter criteria into the appropriate column's text box and then clicking on the filter icon to determine how the screen will be filtered off the entered keyword.

To Filter Off of a Text Column



To Filter Off of a Date Column

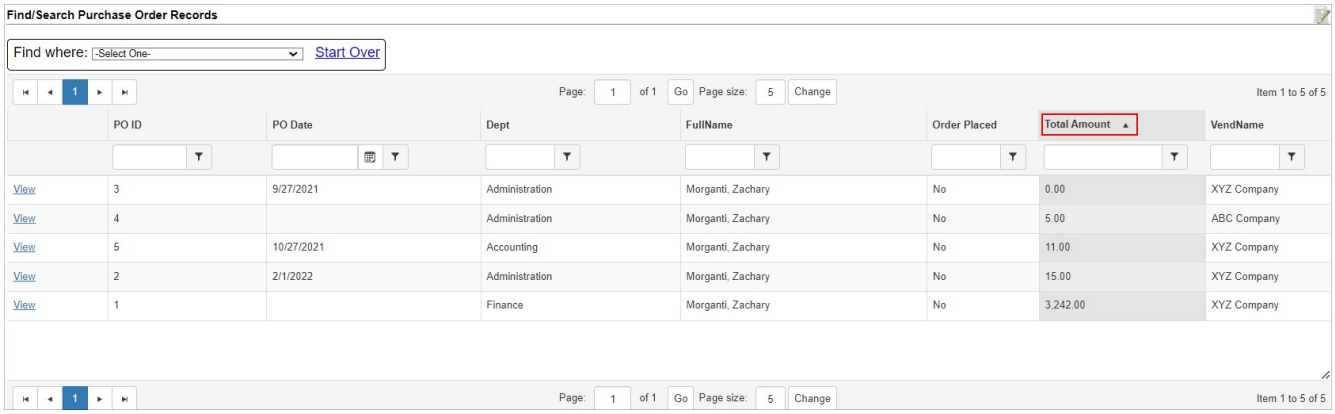


To remove the filter, click the filter icon and select the No Filter option.

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To Sort the Results Grid

Click the column name once to sort the column in ascending order, a second time to sort the column in descending order, and a third time to remove the sort order from the results grid.



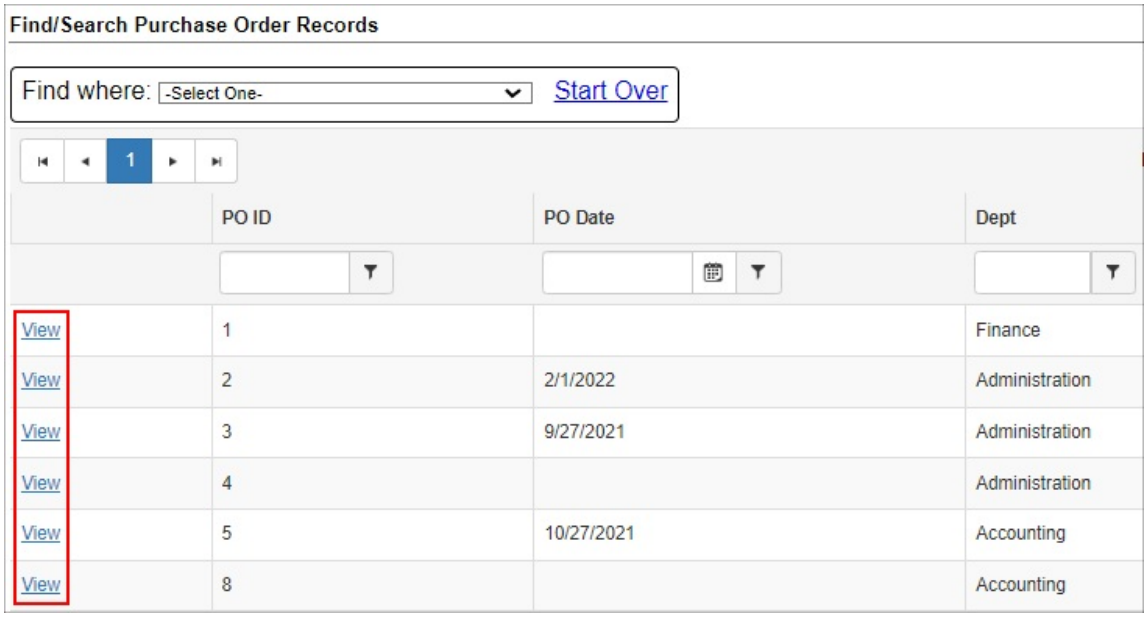
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View Purchase Order Details from Search

View Purchase Order Details from Search

Purchase Orders: View Details from the Search Results List

To view a Purchase Order's **Purchase Order Details** screen from the **Find/Search Purchase Orders search** results list, click **View** for the Purchase Order line item desired.



The **Purchase Order Details** screen for the PO Record selected displays.

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Purchase Order Details

View Employee Permissions for this Record

Budget-Spend Tracking for (Ordered For)

Spend Limit (budget) for the Fiscal Year is:	0.00
Actual Spend Amount (budget) for the Fiscal Year is:	0.00
Pending Spend Amount for the Fiscal Year is:	0.00
Remaining Budget for the Fiscal Year is:	0.00

Spend Limit for Smith, Mary (Buyer/Assigned To)

Spend Limit (budget) for the Fiscal Year is:	0.00
Actual Spend Amount (budget) for the Fiscal Year is:	0.00
Pending Spend Amount for the Fiscal Year is:	0.00
Remaining Budget for the Fiscal Year is:	0.00

Details

Vendor
ABC Company
[Alpha Beta Cave Avenue ABC New Jersey 08042 USA]

Risk Compliance

Notes
Vendor #1

PO Date

Contact Person
Zachary Morganti

Confirmation Number

Buyer/Assigned To
Smith, Mary

Ordered For

Approved By

Status
Pending

Order Placed
No

Department/Business Unit
Finance

Location

Payment Terms
Net 45

Total Amount Received
0.00

Total Amount Remaining
0.00

Collaboration Type
Internal

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Modifying Find/Search PO Columns Displayed

Modifying Find/Search PO Columns Displayed

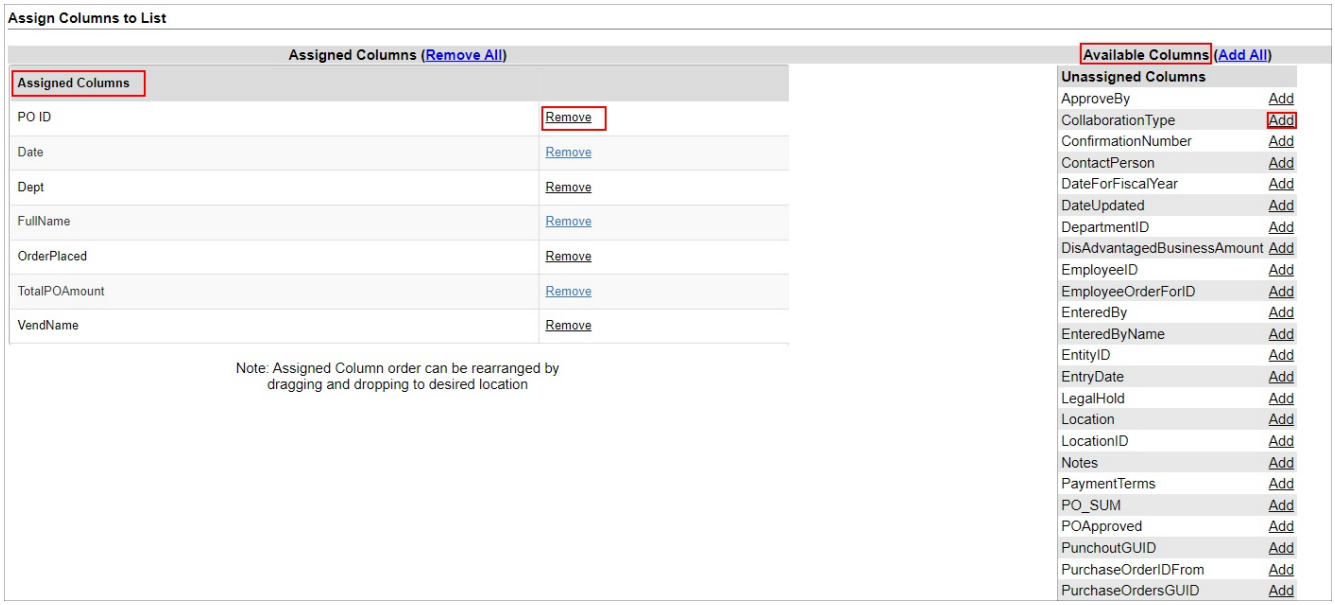
Purchase Orders: Modifying Columns Displayed in the Find/Search Screen

1. To modify the table columns that are returned upon searching Purchase Orders, click **Manage Columns** on the side menu of the **Find/Search** screen.



2. The **Assign Columns to List** screen displays.

3. To add a column to the table, from the **Available Columns** box, click the **Add** button.



Note: The column names in the **Assigned Columns** box do not include the default columns already assigned.

4. To remove a column from the **table**, in the **Assigned Columns** box, click the **Red** button.

5. When finished adding/removing columns, click **Back to List** on the side menu of the **Assign Columns to List** screen to return to the **Find/Search** screen.

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Exporting Search Results for Purchase Orders

Exporting Search Results for Purchase Orders

Purchase Orders: Exporting the Find/Search Screen

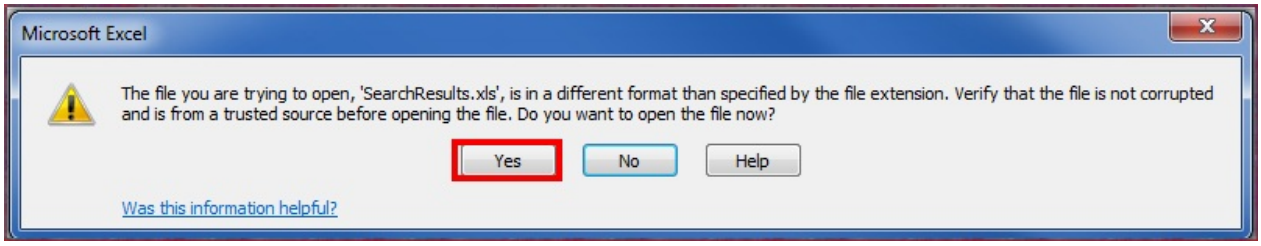
The **Find/Search Purchase Orders** screen can be exported to Excel, Word, or PDF files using the links in the side menu. When the **Find/Search Purchase Orders** screen is exported, the export will include ALL fields shown on the screen.



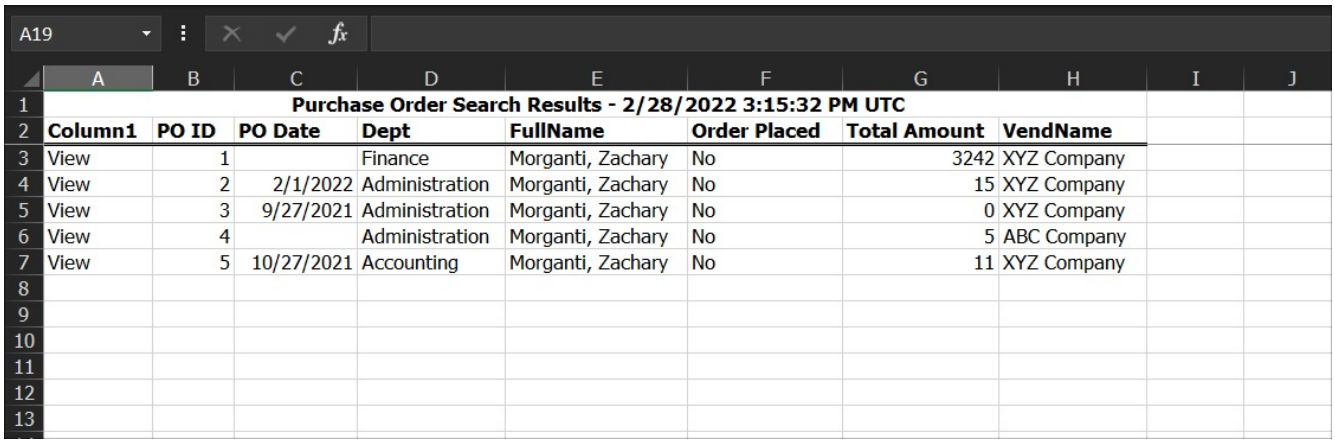
Once export is selected, to **Open** or **Save** the exported document.

It is recommended to first export to Excel, modifications/customization to the grid can be made. When modifications are complete, save the file as a PDF.

When exporting to Excel, be sure to click **Yes** to open the spreadsheet even though the format has a different extension. The spreadsheet has a different file extension because the it is being opened from a Web Browser.



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	A	B	C	D	E	F	G	H	I	J
1	Purchase Order Search Results - 2/28/2022 3:15:32 PM UTC									
2	**Column1**	**PO ID**	**PO Date**	**Dept**	**FullName**	**Order Placed**	**Total Amount**	**VendName**		
3	View	1		Finance	Morganti, Zachary	No	3242	XYZ Company		
4	View	2	2/1/2022	Administration	Morganti, Zachary	No	15	XYZ Company		
5	View	3	9/27/2021	Administration	Morganti, Zachary	No	0	XYZ Company		
6	View	4		Administration	Morganti, Zachary	No	5	ABC Company		
7	View	5	10/27/2021	Accounting	Morganti, Zachary	No	11	XYZ Company		
8										
9										
10										
11										
12										
13										

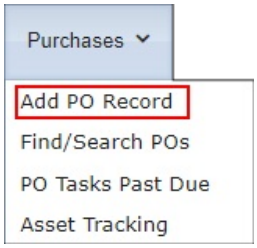
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Adding a Purchase Order

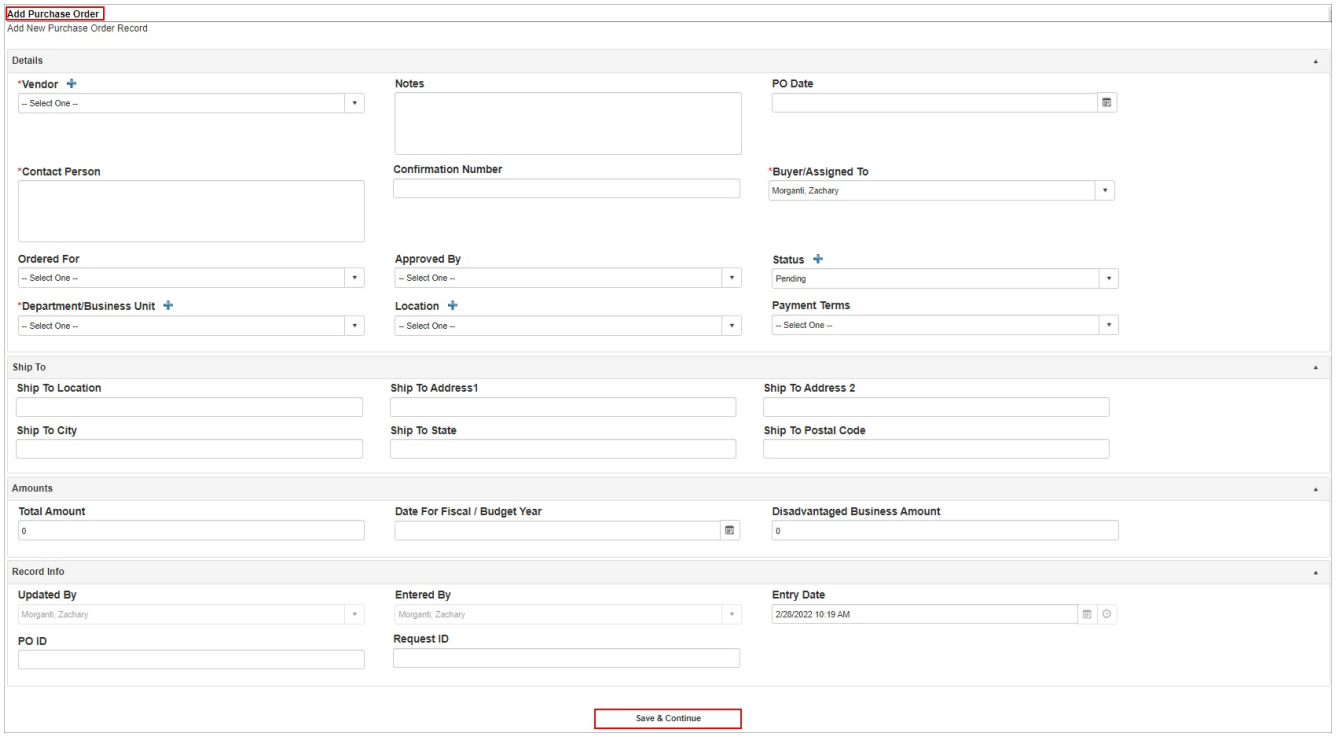
Adding a Purchase Order

Purchase Orders: Adding POs

To add a Purchase Order to your CobbleStone application, navigate to **Purchases** > **Add PO Record**.



The **Add Purchase Order** screen displays on which all required and necessary information for the Purchase Order is completed.



- All fields that have a **red asterisk** (*****) next to the field name means that population of the field is required before the record can be committed to the system.
- To add a new Company to the Company list, provided the proper permissions assigned, click **Add Company** at the top of the page to quickly add a new Company name for it to show up in the **Vendor/Customer** drop-down to be selected for this PO.
- To have the record appear on the Vendor/Client Gateway as a public record, change the value of **Collaboration Type** to Public.

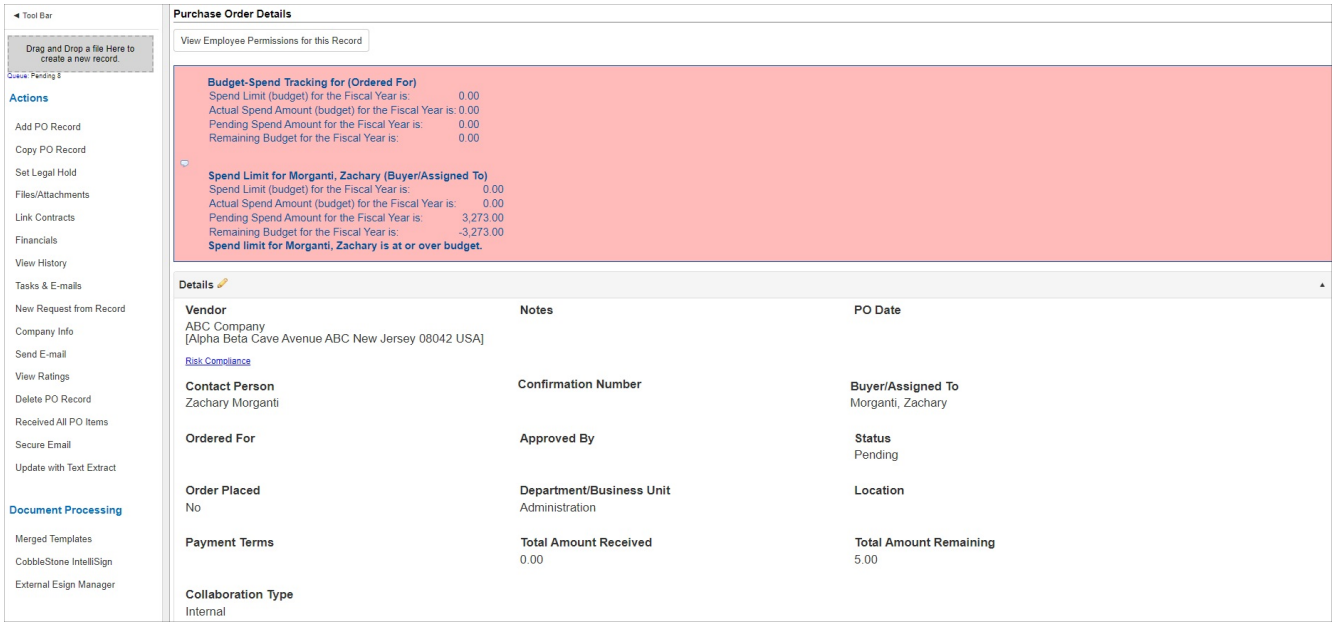
Notes:

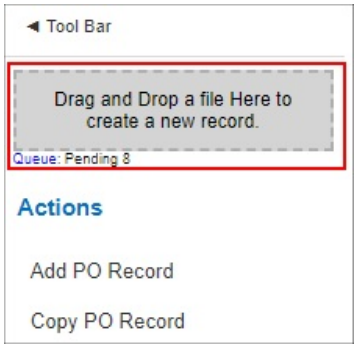
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Once a company added via the **Add Company** button but after the PO has been added, go to the new Company's **Company Details** screen to fill out any additional information about the Company that should be recorded. Please see the View and Edit Company/Vendor Wiki page for more information about navigating to and editing the Company Details screen.

The fields displayed on the **Add Purchase Order** screen can be added to and modified by a System Administrator or an Administrator with the proper permissions. Please see the Manage PO Fields (PO Details Screen Wiki page for more information about managing fields on the PO Details screen.

Once all required and necessary information is entered, click **Save & Continue** to save the new PO. The **PO Details screen** displays on which a user can view the details of the PO and make any necessary modifications.

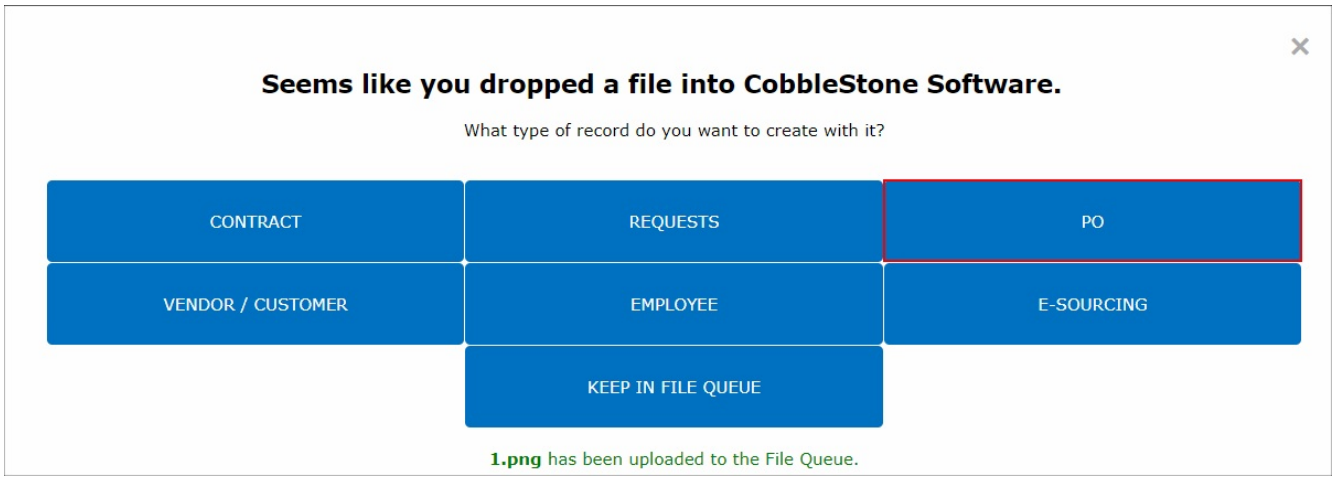




You are also able to add a Purchase Order from a file on any page with the grey Drag and Drop box in the side menu.

After dragging and dropping the file onto the page you will be prompted with a selection of what record type you wish to create. To create a purchase order record you will need to click the **PO** button.

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Then you are brought to a screen to review the file and enter all necessary metadata for the record.

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Employee Budget

Employee Budget

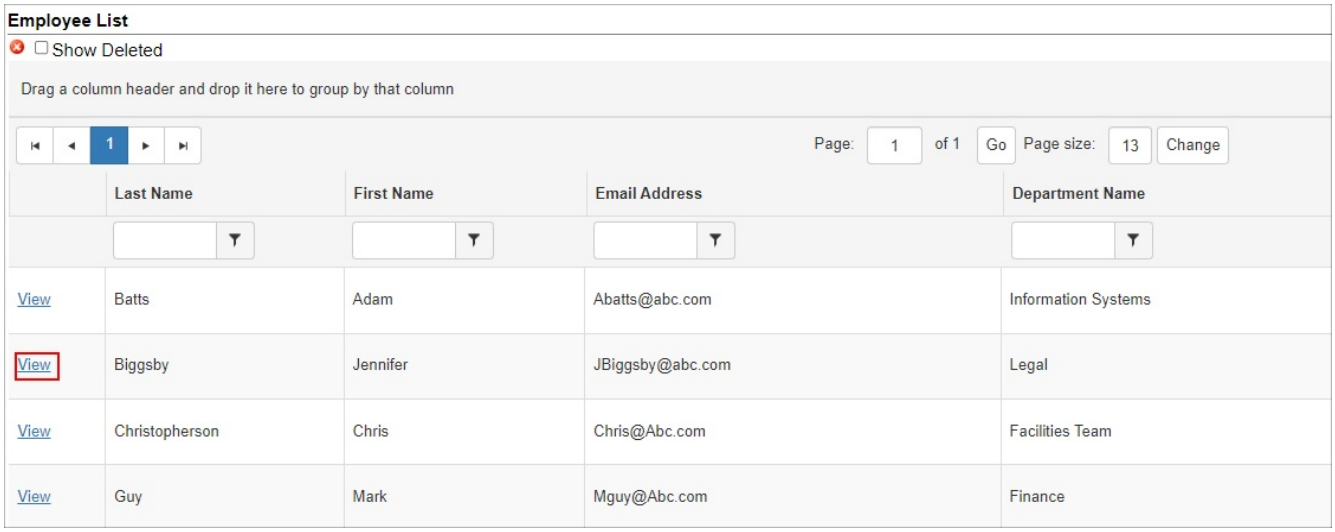
Purchase Orders: Employee Spend Limits

Contract Insight supports the ability to give the employee/user a spending limit for the fiscal budget year.

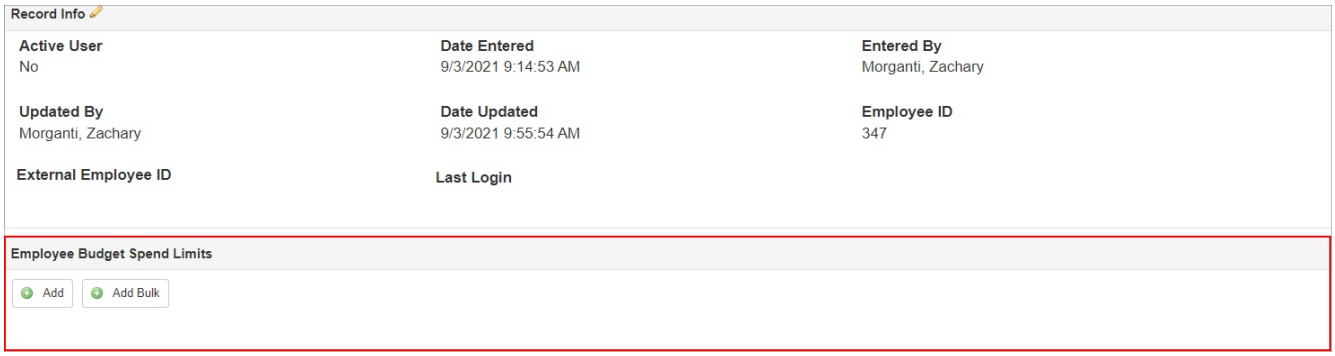
To give the employee a spending limit, navigate to **Employees** > **Employee List**.



Once on the Employee List screen, click **View** to the left of the employee's **Last Name**.



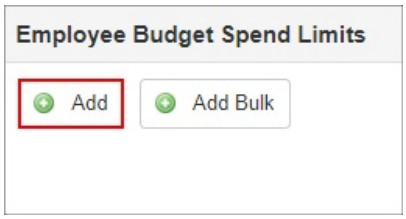
On the **Employee Details** screen, scroll down to the **Employee Budget Spend Limits** sub-table.



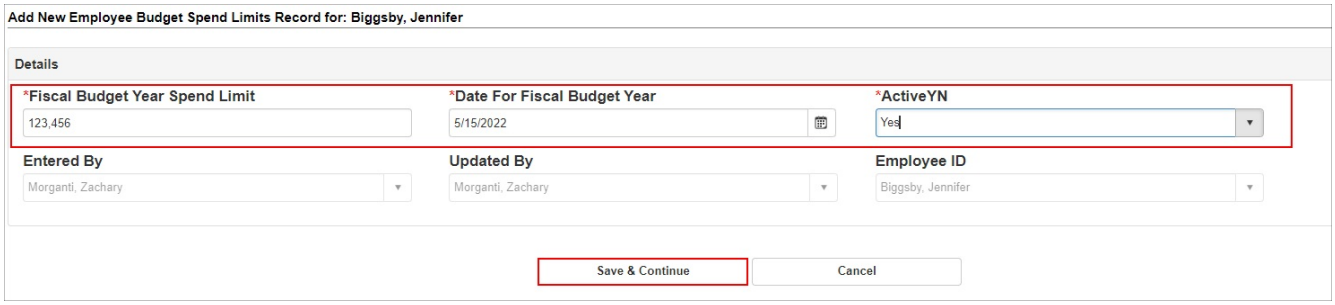
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Adding Employee Budget Spend Limit(s)

To add **Employee Budget Spend Limit(s)**, click **Add**.

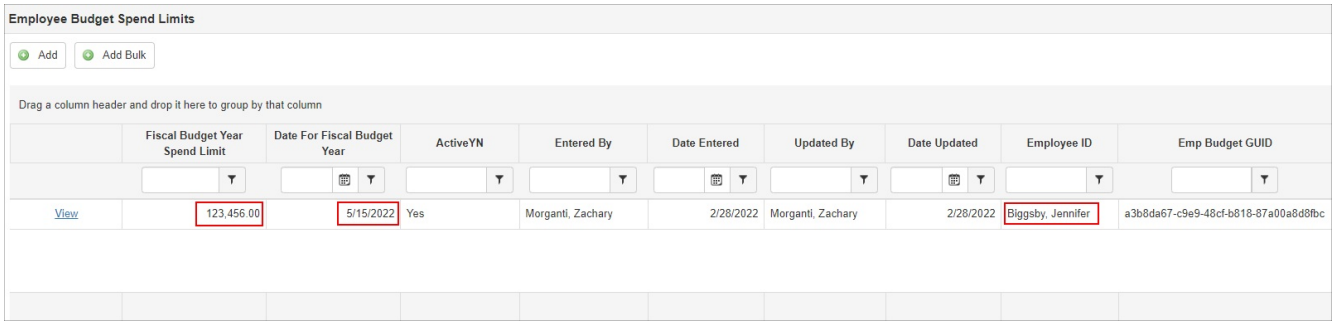


On the **Add** screen enter in the **Fiscal Budget**, **Date for Fiscal Budget Year**, and is the record **Active**. When the required fields are completed, click **Save & Continue** to add the spend limit for the employee.



Viewing and Managing the Spending Limit:

To view an employee budget spending limit from the sub-table, click **View**. The **Record Details: Employee Budget Spend Limits** screen displays.



The Side Menu

Copy Record – the employee can copy the budget spend limit by clicking **Copy Record**.

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Return – Clicking **Return** will bring the user to the **Employee Details** screen.

View History – To view the **History Details & Audit Log** screen for this record, click **View History**.

Delete Record - If clicked, a prompt displays: Are you sure you want to delete this record?. Click **Yes, delete it** to remove the record.

Spend/Budget Alert

On a **Purchase Order**, when a **PO Line Item** or **Line Item** for **Requests** is added from the **Catalog** to which the employee is assigned to the calculations in the **Budget-Spend** alert atop the screen start to calculate. This alert that shows atop the screen on **Purchase Orders** and **Requests** within the system. This alert shows the **Budget-Spend Tracking** for the **Employee Ordered For** and the **Buyer/Assigned to**. Also, it lets the employee know what their **Spend Limit (budget)** for the Fiscal Year is, their **Actual Spend Amount (budget)** for the Fiscal Year is, their **Pending Spend Amount** for the Fiscal Year is, and then calculates the **Remaining Budget** for the Fiscal Year.

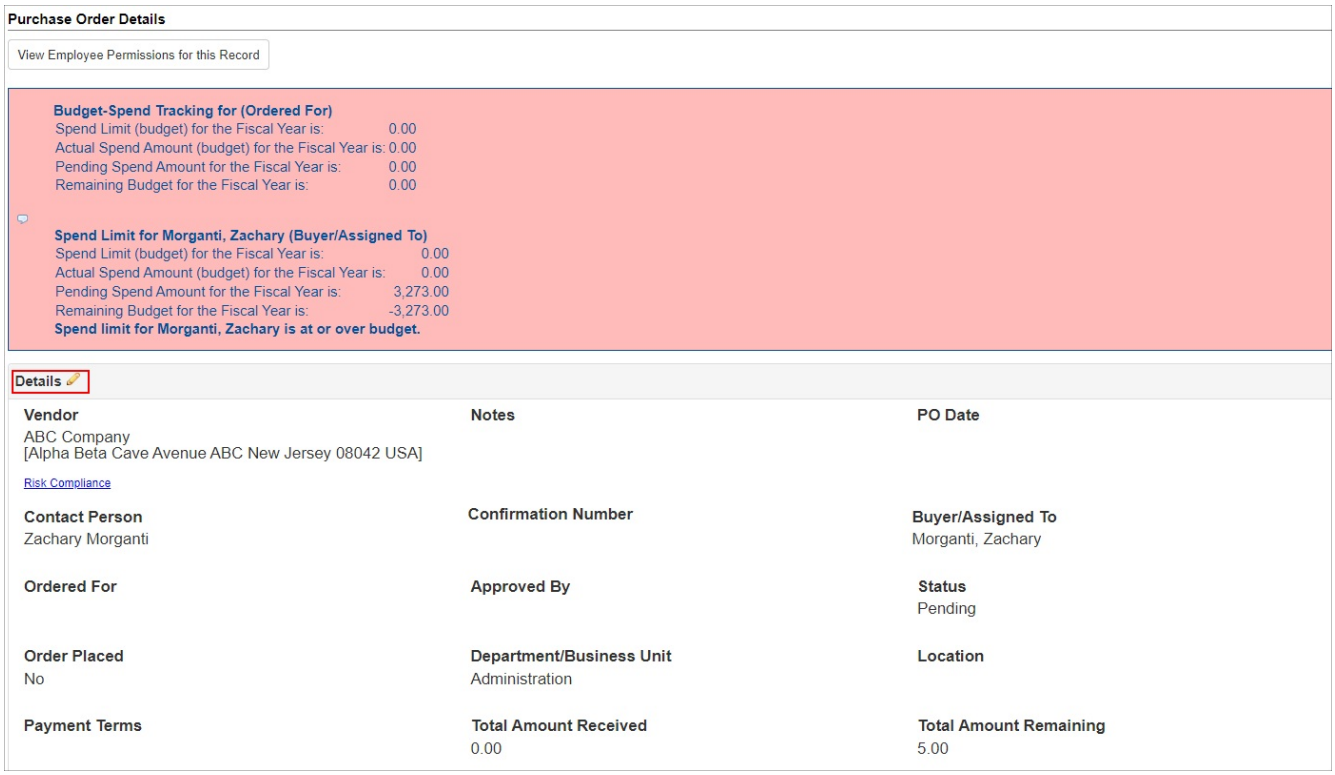
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Manage/Edit a PO

Manage/Edit a PO

Purchase Orders: Manage/Edit

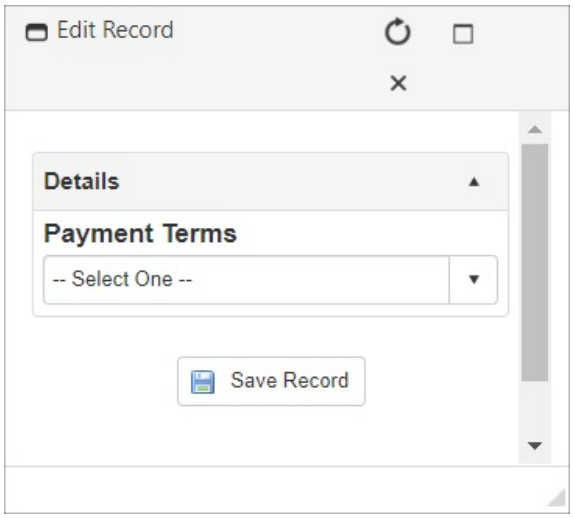
To Manage/Edit an existing Purchase Order, navigate to the PO's **Purchase Order Details** screen.



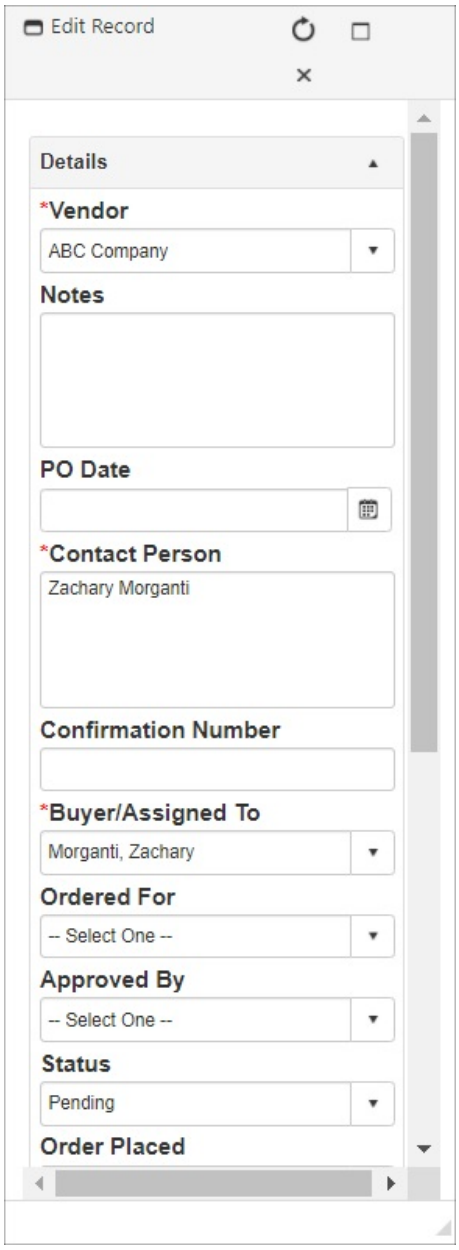
Hover the mouse pointer over the field name/group. A **pencil icon** ( ) appears.

To edit a Purchase Order Details screen field, click the pencil **icon** for a pop-up window for the field. Enter or select (depending on the type of field) a new value.

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To edit multiple fields in a Field Group at once, click the **pencil icon** next to the Field Group's name.



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Once the field's value has been updated, click **Save Record** to save the new value for the field and return to the **Purchase Order Details**.

To cancel updating the field's value, click the **X** in the upper-right corner of the edit window.

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Add/Search/Delete Attachments for PO

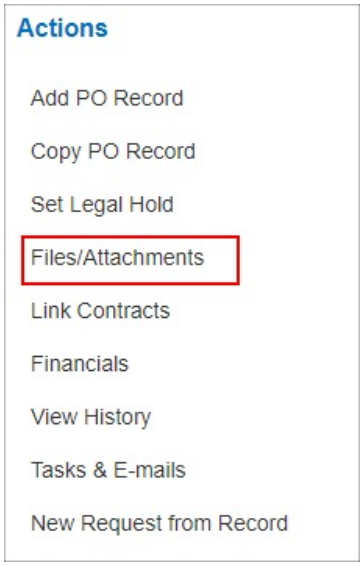
Add/Search/Delete Attachments for PO

Purchase Orders: Attachments

CobbleStone allows users with the proper permissions to add an unlimited number of attachments/files to be uploaded to each Purchase Order.

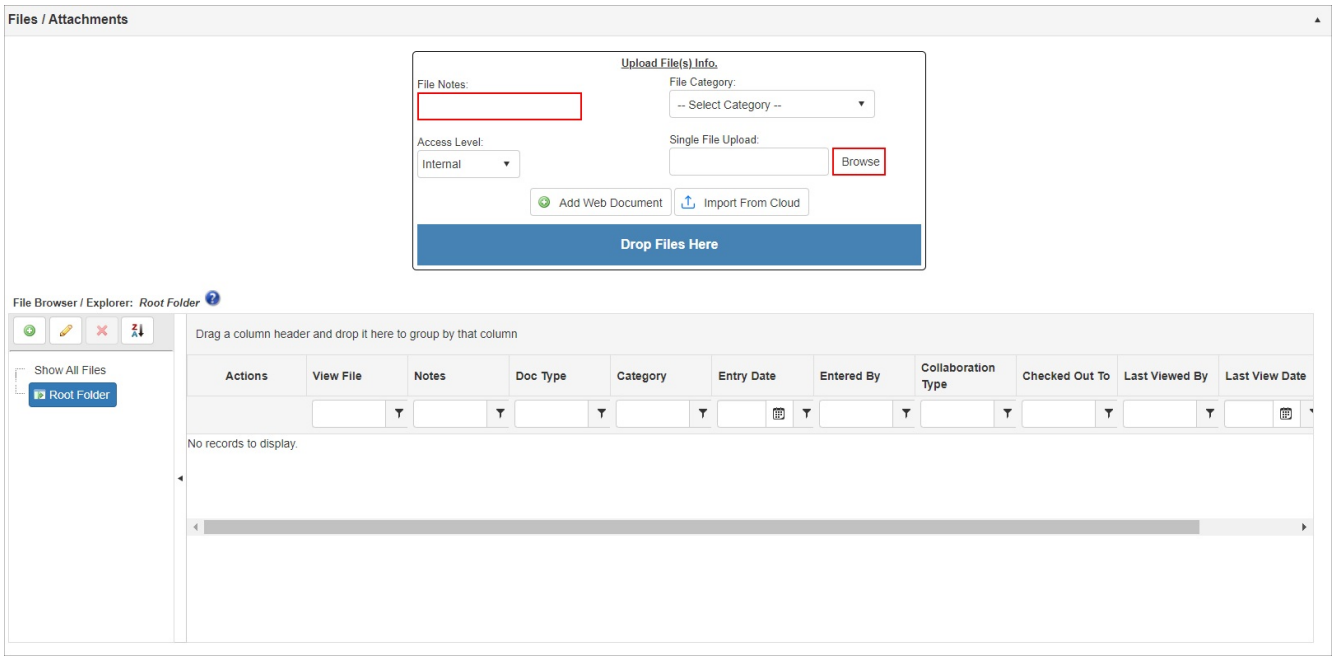
To Add a PO File/Attachment

1. Navigate to the Details screen of the Purchase Order which to add an attachment. Click **Files/Attachments** on the side menu or scroll down the details screen to the **Files/Attachments** section of the page.

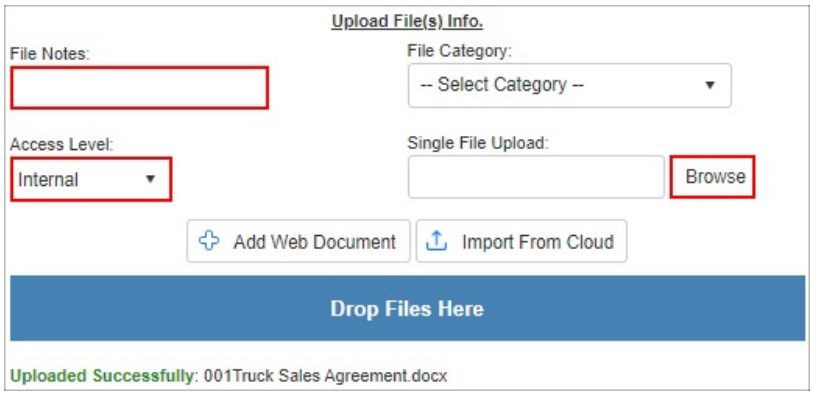


2. Click **Choose File** to navigate to and select the file to upload/attach to the Purchase Order. The file name appears to the right of **Choose File**.

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3. Optionally, add a note in the **Notes** text box, and then select whether the attachment should be Internal, Public, or Gateway.





a. The Internal option means that, if your organization has purchased the Optional Add-On Module for the **Vendor/Client Gateway**, that the attachment is viewable internally by users of your organization of the CobbleStone application. If your organization has not purchased the Optional Add-On for the Vendor/Client Gateway, it does not affect the attachment's viewing capabilities.

b. The **Public** option means that, if your organization has purchased the Optional Add-On Module for the **Vendor/Client Gateway**, the attachment is viewable on to the public on the Public portion of the Vendor/Client Gateway (meaning the Vendors will not need to log in to the Gateway to view the attachment).

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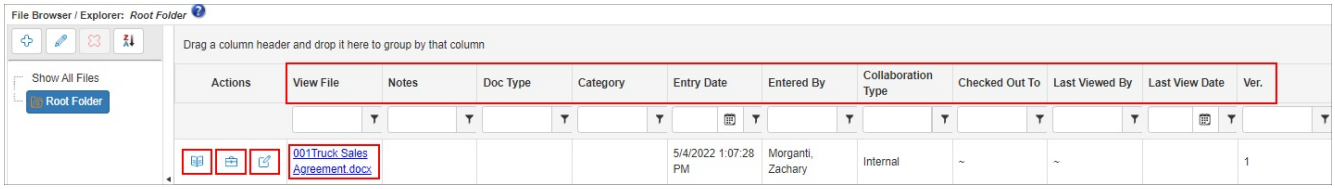
c. The Gateway option means that, if your organization has purchased the Optional Add-On Module for the **Vendor/Client Gateway**, the attachment is viewable to authorized Vendors who have been allowed access to log in to the Gateway portion of the Vendor/Client Gateway (meaning the Vendors will need to log in to the Gateway to view the attachment).

Note: If your organization has not purchased the Optional Add-On for the **Vendor/Client Gateway**, if an attachment is marked as Public or Gateway, it will not affect the attachment's viewing capabilities as the Public option only allows the attachment to be displayed on a public site/URL that does not exist if your organization has not selected this add-on module while the Gateway option only allows the attachment to be displayed on a Gateway site/URL that does not exist if your organization has not selected this add-on module.

4. Once any necessary notes and the area for which attachment should be displayed are entered, click **Save File** to save the attachment to the **Purchase Order Details** screen.

To Search/View/Delete a PO File/Attachment

Once the file has been successfully attached, it is displayed in a grid below **Choose File**. Note several items about the grid:



a. The grid can be sorted by clicking the column name (click once for ascending order, a second time for descending order, and a third time to remove the sort order).

b. The grid can be filtered by entering a keyword(s) into the filter text box and then clicking the **filter icon** ( ) to select how the grid should be filtered based on the keyword(s) entered.

c. To delete a file/attachment, click **Delete** to the left of the file name and then either confirm or cancel deleting the attachment.

d. To View an attachment, click the file name to open the attachment.

Note: Live editing is not available for attachments. If a file/attachment needs to be edited, open/download the attachment, make any changes/updates to the file, save the attachment again, and re-upload/re-attach the updated file/attachment.

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Link a PO to a Contract Record

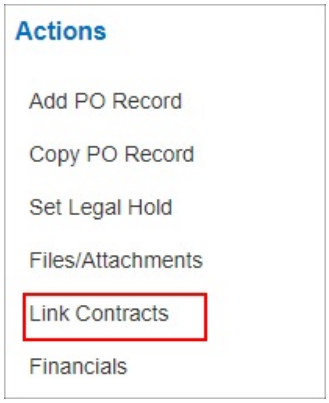
Link a PO to a Contract Record

Purchase Orders: Link to a Contract Record

Once a Purchase Order has been successfully created, you are then able to link the Purchase Order to a Contract Record in your CobbleStone application.

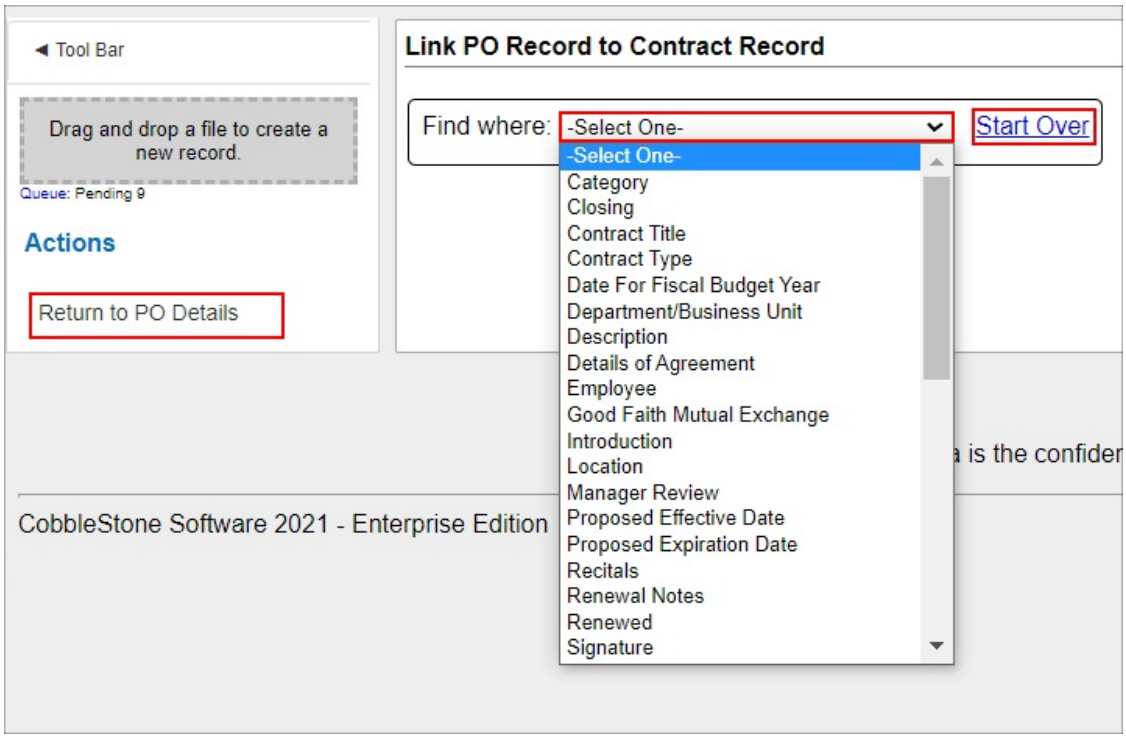
To Link a PO to a Contract Record

1. Click **Link Contracts** on the side menu of the **Purchase Order Details** screen.



2. The **Link Record** screen displays on which a field-level search for the contract record to link to the PO is performed. Please see the Field Level Searching/View All Wiki page for more information about performing field level searches.

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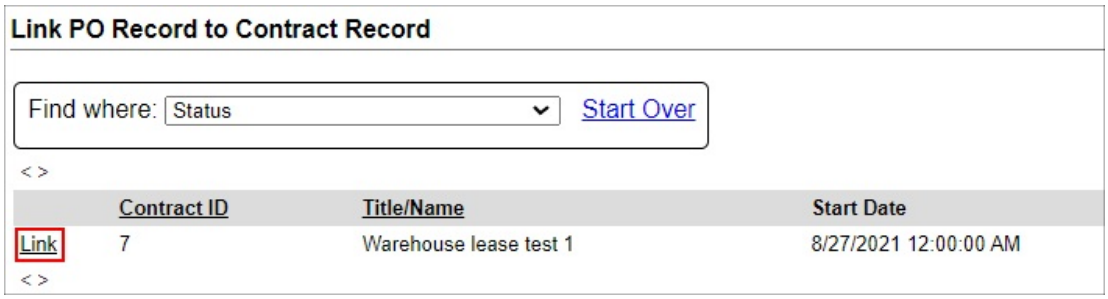


3. Select the Contract Details field by which to search. A drop-down box or text box opens (depending on the field type of the field selected). Enter or select the value of the field selected by which to search. Click **Search**.



Note: To select a new field to search, click **Start Over** to refresh the **Find Where** drop down/search criteria.

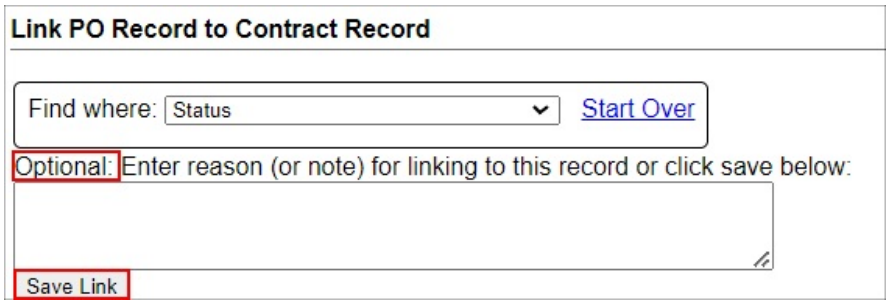
4. A list of Contract Records meeting the search criteria displays.



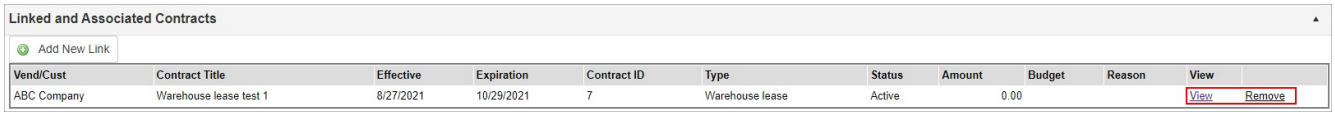
5. Click **Link** for the Contract Record's name/title to link to the Purchase Order.

6. Optionally, enter an optional note/reason for creating the link between the PO and the Contract Record. Once entered, click **Save Link** to save the link between the Purchase Order and Contract Record selected.

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7. The Purchase Order Details screen displays. Scroll down to the bottom of the page to the **Linked and Associated Contracts** section. An overview of the Contract Record's details for the contract record that is linked to the PO are displayed. View the Contract Details screen by clicking **View**.



8. To remove the link between the Contract Record and the Purchase Order, click **Remove**.

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Email a Purchase Order

Email a Purchase Order

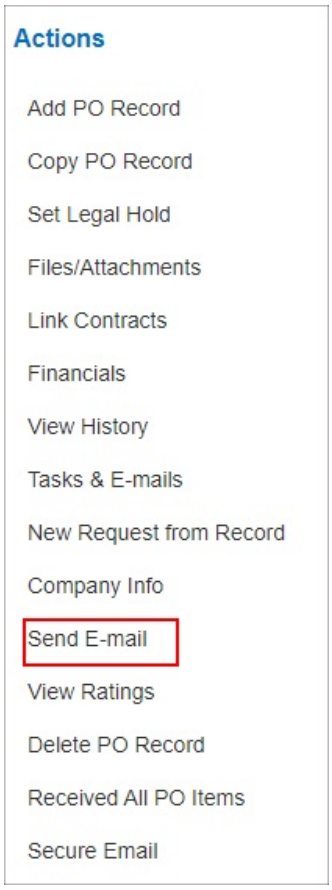
Purchase Orders: Emailing

CobbleStone allows users with the proper permissions to send an email of the Purchase Order and optionally any attachments for the Purchase Order to specified Vendors/Clients in the Contract Insight **Company List** and/or Employees in the **Employee List**.

Note: For a Vendor/Client or Employee to be emailed, the correct email address in the Details screen for the Company or Employee record must be available, or it will need to be entered manually (shown below).

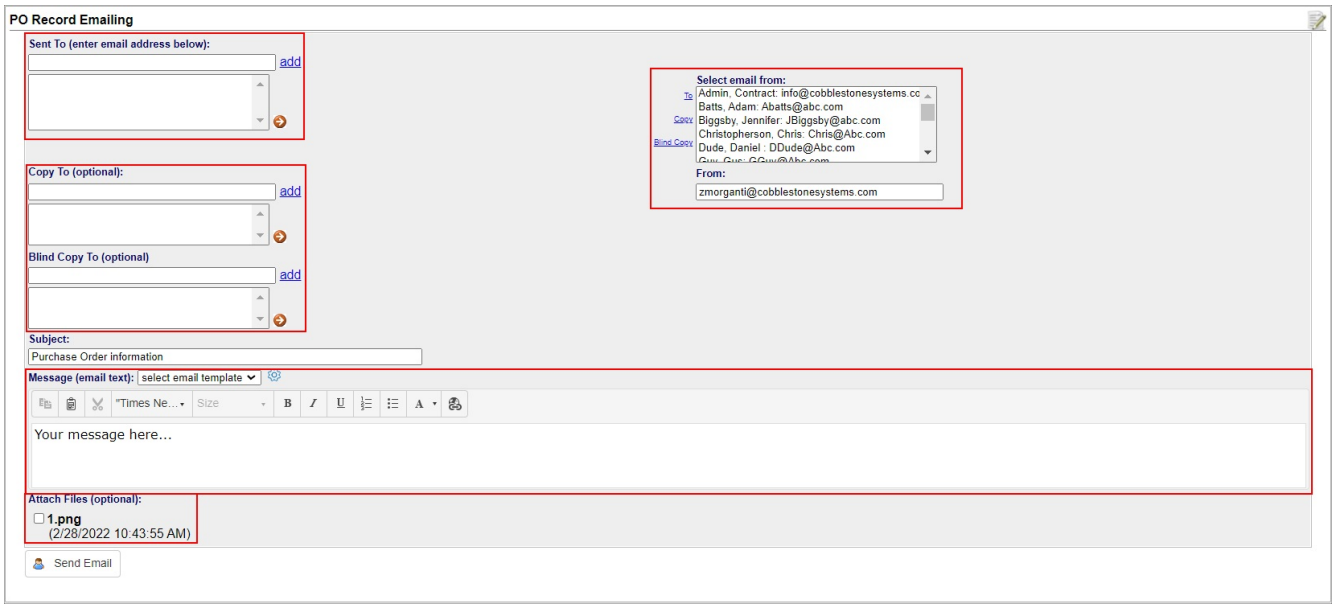
To E-mail a PO

1. Navigate to the Details screen for the Purchase Order from which to send the e-mail. Click **Send E-mail** on the side menu.



2. The **PO Record Emailing** screen displays.

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a. To add a **To** e-mail address, click the e-mail address in the **Select e-mail from** list and click **To**.

b. To add a **Copy To** e-mail address, click the e-mail address in the **Select e-mail from** list and click **Copy**.

c. To add a **Blind Copy** e-mail address, click the e-mail address in the **Select e-mail from** list and click **Blind Copy**.

Note: To add an e-mail address to the not listed in the **Select e-mail from** list, enter the e-mail address into the text box in the section immediately below the appropriate area's title and click **Add**.

3. Enter a message into the **Message (e-mail text)** section to be included in the e-mail sent to the recipient(s) selected/entered.

4. Mark the tick-box for any of the attached files/attachments for the PO to be included in the e-mail Click **Send E-mail**.



5. Once the e-mail has been sent successfully, The message was sent displays to the right of **send e-mail**.



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Copy a Purchase Order

Copy a Purchase Order

Copy a Purchase Order

For purchase orders that are created frequently, the ability to copy an existing purchase order can be a time-saver.

1. Open an existing Purchase Order.

2. Click **Copy PO Record**.



3. A **Purchase Order Add** screen displays. Any fields designated in the **Field Mapper** are copied to the add screen.

4. **Save** the new Purchase Order. On the details screen, all line items from the origin PO are copied.

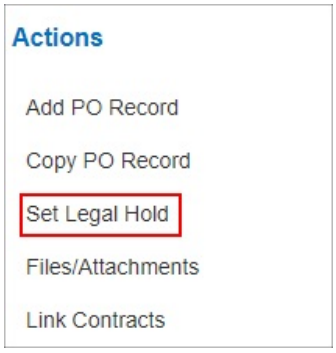
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Legal Hold

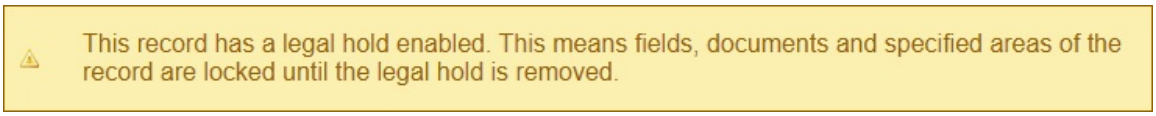
Legal Hold

Purchase Order Details: Legal Hold

A System Admin User or any User with the **Setup: Manage Legal Holds** Permission assigned can manage a Purchase Order Record's **Legal Hold** Status. To put a record on Legal Hold, click **Set Legal Hold** on the side menu, then confirm via the pop-up.



A banner, as seen below, appears along the top of the record. Fields are locked from editing and Attachments can no longer be added or deleted.



To remove the Legal Hold, click **Remove Legal Hold** on the side menu, then confirm via the pop-up.



To be able to attach new files while a record is on Legal Hold, there is a configuration setting for that. Navigate to:

Manage/Setup > Application Configuration > Config Settings

Make sure **Security** is selected for the **Select Configuration Group** drop down. Go to **Group: Legal Hold** and adjust the **Disable File Uploads with Legal Hold** setting.

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There is also a configuration setting regarding Document Authoring and Document Collaboration processes while on Legal Hold. (Document Collaboration being only relevant if using the Document Collaboration Add-On Module)

Select **Security** for **Select Configuration Group**. Modify **Document Collaboration with Legal Hold** as necessary.

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View a PO Template

View a PO Template

This functionality has been replaced. Please see the Template Management section of the Wiki for details.

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Export/Auto-Attach a PO Template as PDF

Export/Auto-Attach a PO Template as PDF

This functionality has been replaced. Please see the Template Management section of the Wiki for details.

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Issue a PO

Issue a PO

This functionality has been replaced. Please see the Template Management section of the Wiki for details.

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Add a Purchase Order Line Item

Add a Purchase Order Line Item

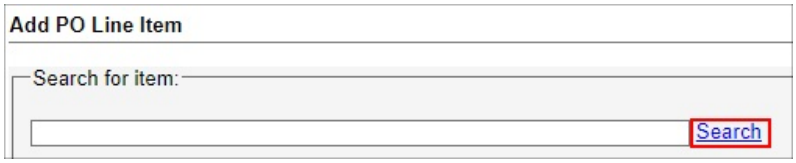
Purchase Orders: Add Line Items

When Line Items are added to a Purchase Order, the total sum of the Purchase Order Line Items is automatically calculated and populated into the **Total Amount** field on the Purchase Order Details screen.

1. To add a Purchase Order Line Item or an item for which the PO is being issued, navigate to the **Purchase Order Details** screen and scroll down the screen to the **PO Line Items** section. Click **Add PO Line Item**.

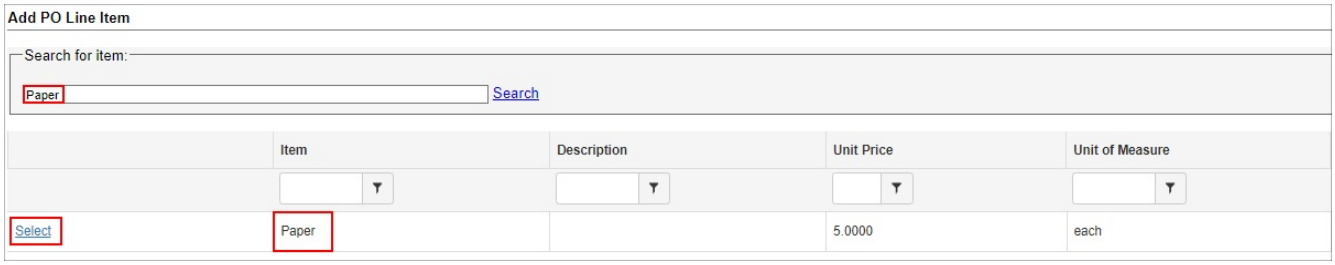


2. The **Add PO Line Item** screen displays. Start by searching for the item related to the Purchase Order Line Item.



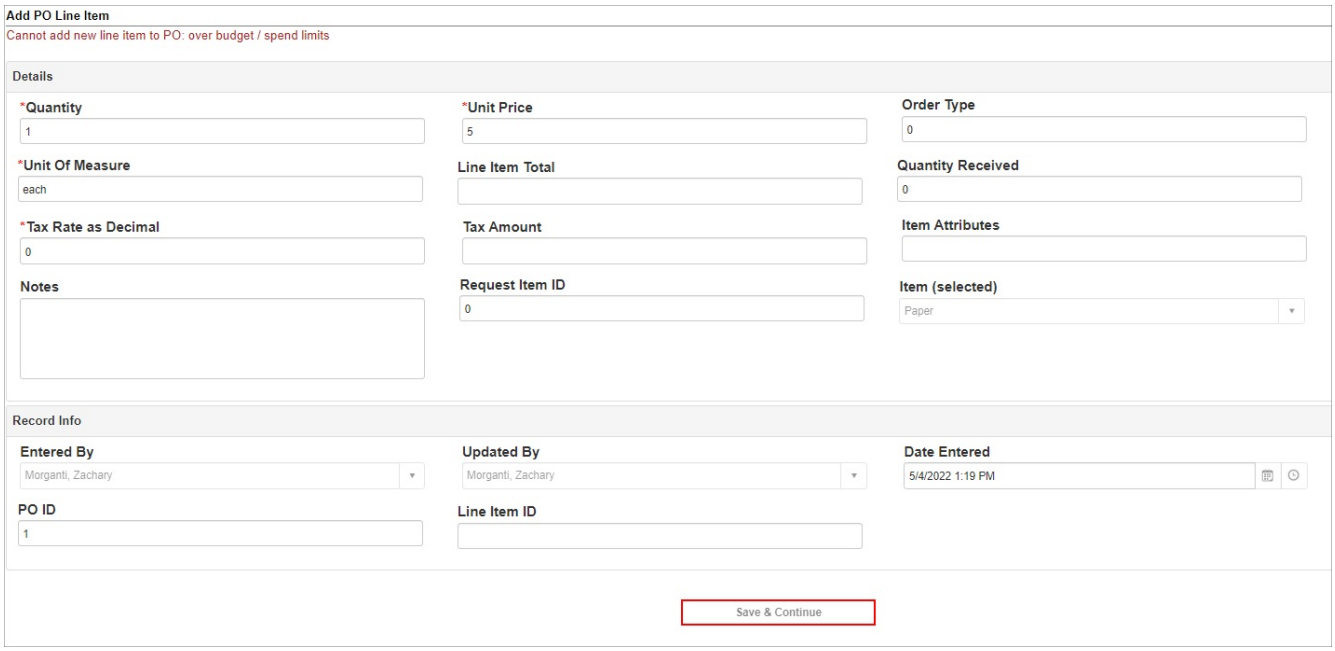
3. Enter the text for a keyword search and click on **Search**.

Note: Users have access to specific items based on the catalog(s) assigned. See the Wiki page on Catalog Management for more information.



4. Click **Select** to the left of the Item choice to proceed.

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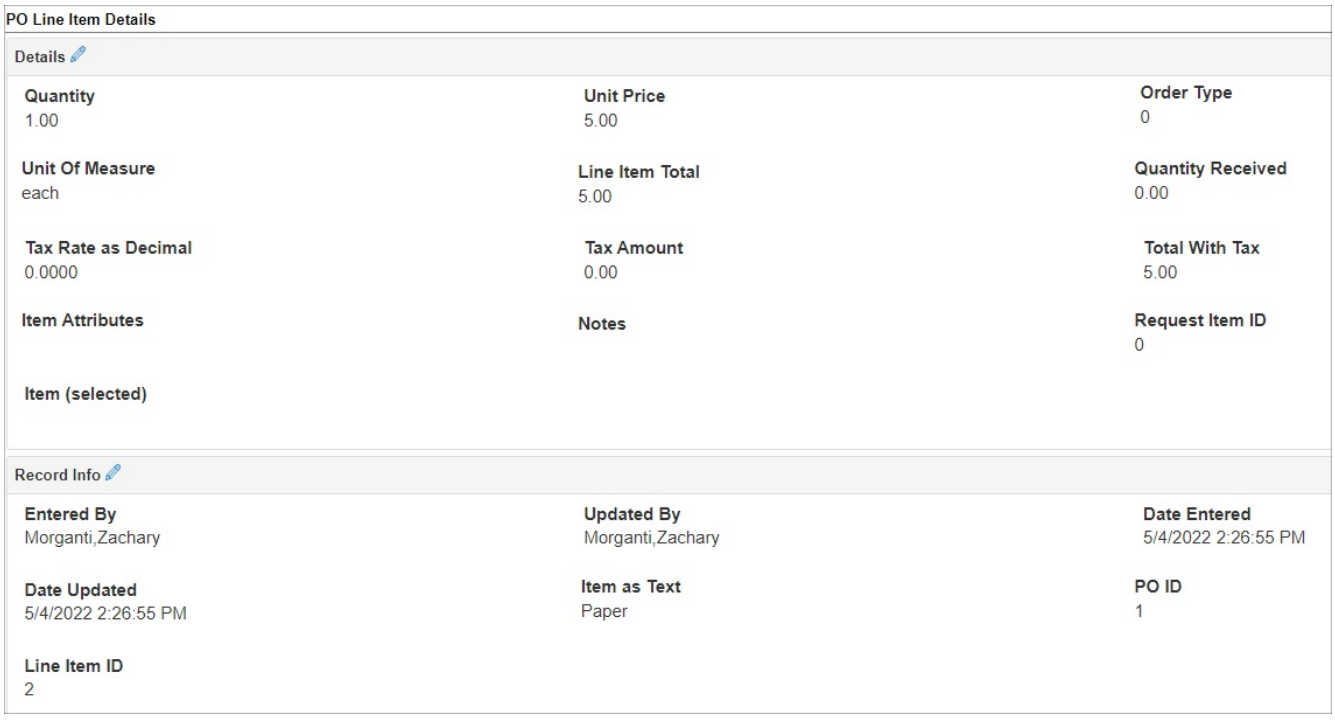
5. Fill out the needed fields accordingly

a. Enter the Quantity (how many of the items), Unit Price ($ amount for one item), and the Unit of Measure (i.e. each, hours, lbs., etc.)

b. Enter the applicable Tax amount as a decimal as well as any notes.

c. Click **Save & Continue**.

6. The new Line Item's **Item Details** screen displays.



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Search/Edit PO Line Items

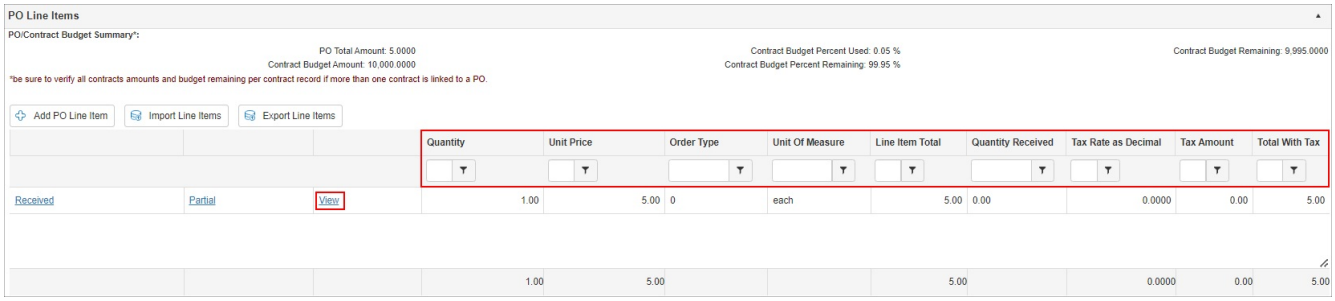
Search/Edit PO Line Item

Purchase Orders: Search for/Edit Line Items

Navigate to the Purchase Order Details screen and scroll down the screen to the **PO Line Items** section.

To Sort the PO Line Items Grid

Click the name of the column by which to sort by: once to sort ascending, a second time to sort descending, and a third time to remove the sort order from the grid.



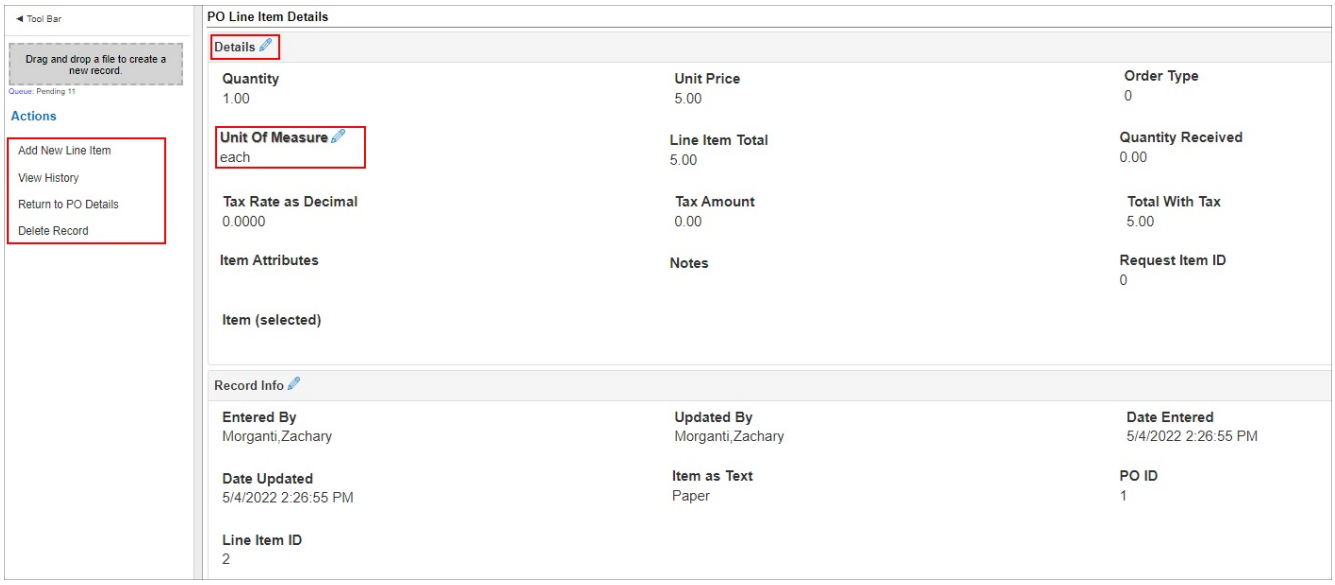
To Filter the PO Line Items Grid

Enter the keyword(s) into the filter text box for the column by which to filter the grid. Click the **filter icon** () to select the means of filtering the grid based on the keyword(s) entered.

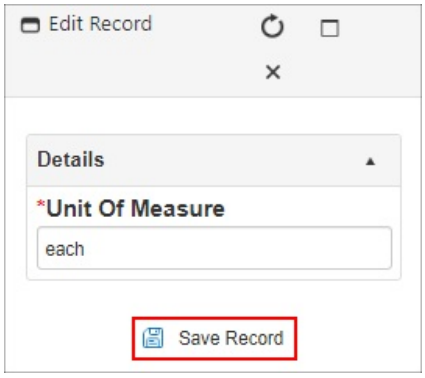
To Edit a Purchase Order Line Item

1. Click **View** link for the line item to open the **Item Details** screen.

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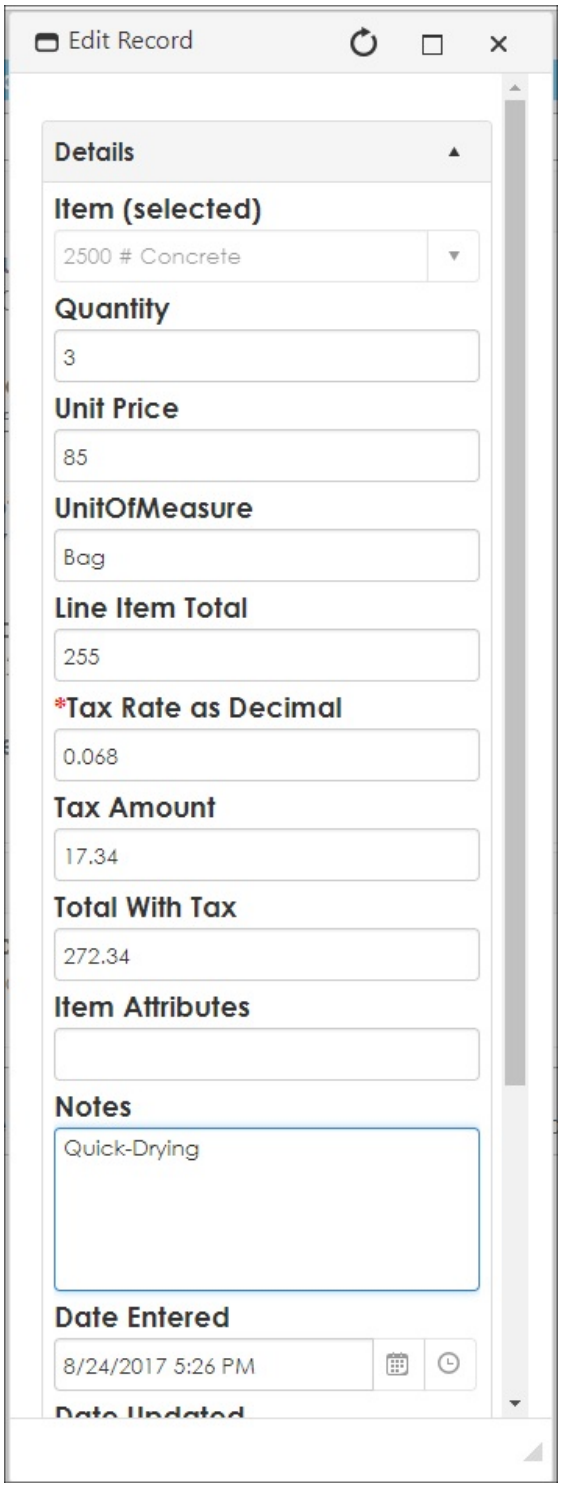


2. To edit a field on the **PO Line Item Details** screen, click the **pencil icon** ( ) for the field you would like to edit. Upon making the appropriate changes, click **Save Record** to save the edit. Alternatively, click the **X** in the upper-right corner to cancel.



3. A user with the appropriate permissions can also edit all a Field Group's fields at once, by clicking the **pencil icon** next to the Field Group name.

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4. Upon saving the changes, the **Item Details** screen again displays.

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Importing PO Line Items

Importing PO Line Items

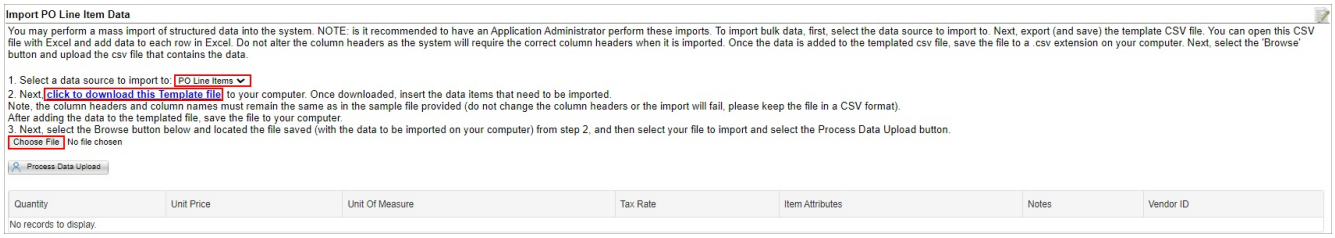
Purchase Orders: Importing Line Items

CobbleStone's Purchase Order Line Items section allows users with the proper permissions to Bulk Import PO Line Items using a spreadsheet template provided by the CobbleStone application. Please note that only authorized/licensed users with the proper permissions can perform importing.

1. Navigate to the **Purchase Order Details** screen to which to import the Purchase Order Line Items and scroll down to the **PO Line Items** section.



2. Click **Import Line Items** in the PO Line Items section. The **Import PO Line Item Data** screen displays with a drop-down box. Click **PO Line Items** to display a link to download the import template.



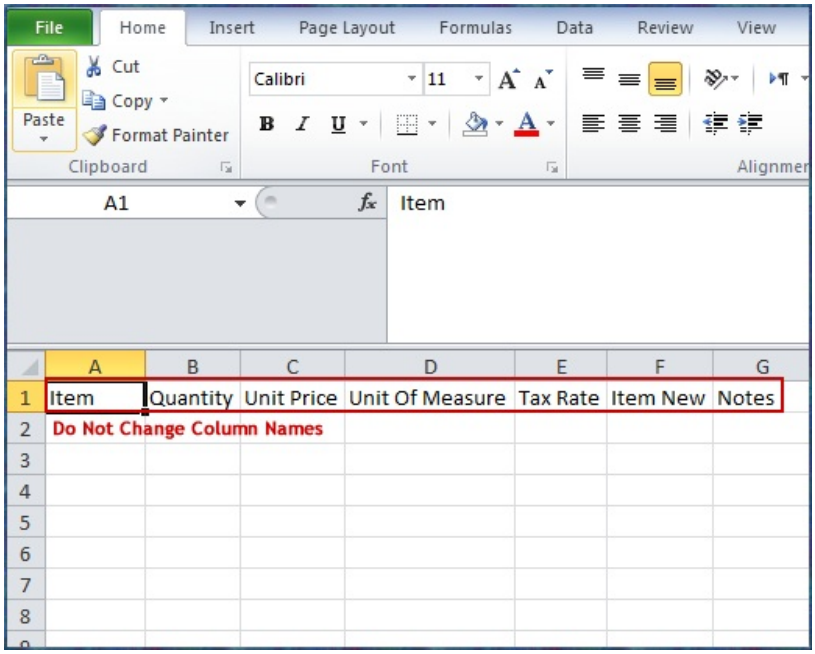
3. Before downloading the template, it is a Best Practice Recommendation to go to the **Manage Fields** screen for the **PO Line Items** table to review what types of data each field requires as well as which field(s) are required to be populated.

4. Once the field types and data requirements for the fields on the PO Line Items table have been reviewed, click **click to download this Template file** to download the import spreadsheet.

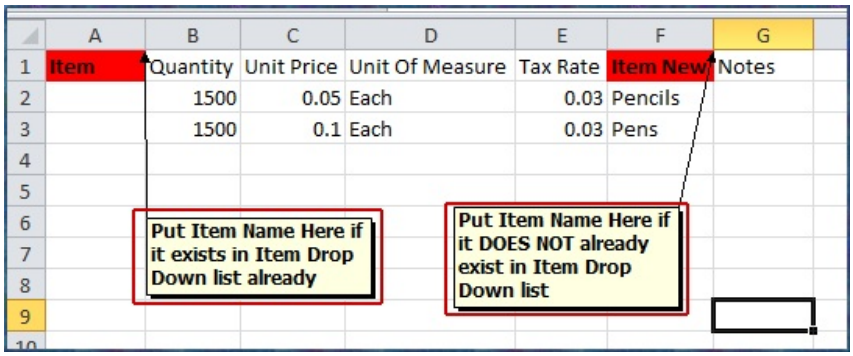
5. The import template is downloaded as an MS Excel file.

Note: Never change or delete a column name in the template.

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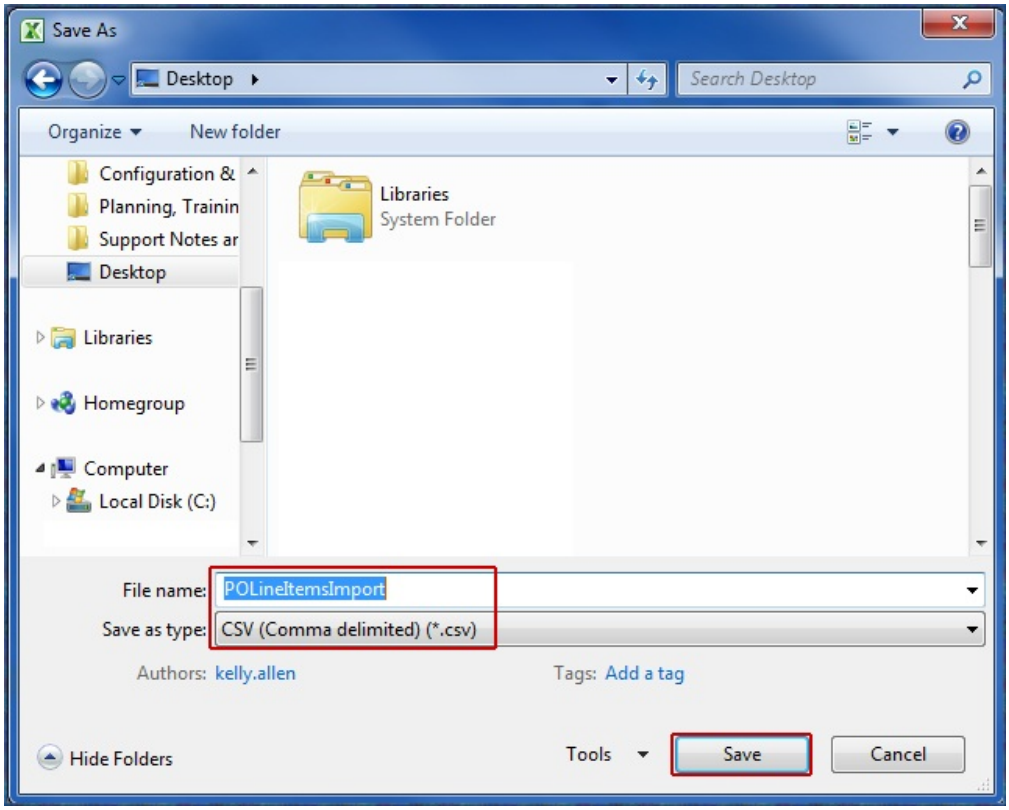
6. Populate the template with the information to be imported.



Note: If the Item Name is already in the Items drop down list, enter the **Item Name** into the **Item** column. If the Item Name is not already in the Items drop down list, enter the Item Name into the **Item New** column.

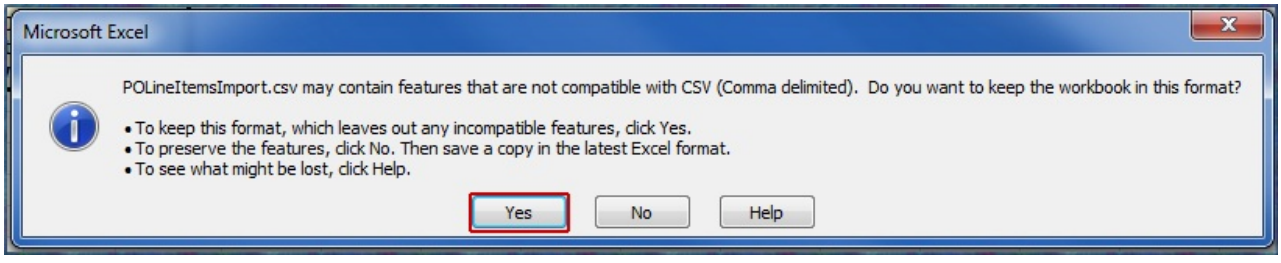
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7. Click **Save As** for the template and navigate to the correct location where the template should be saved and enter a name for the template.



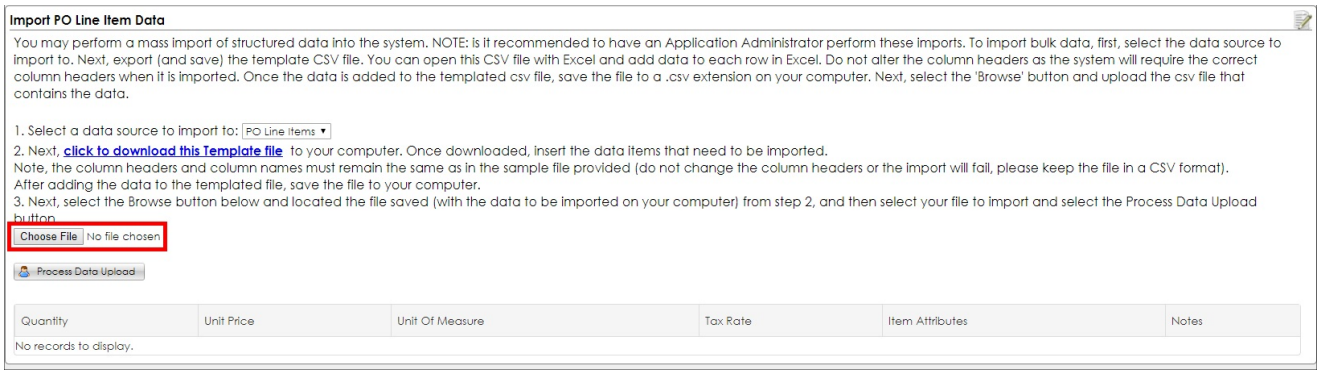
8. Before saving the template, be sure that the **Save As Type** drop-down says CSV (Comma Delimited) to save the spreadsheet as a CSV File. Click **Save**.

9. Click **Yes** to confirm the save as a CSV spreadsheet.



10. Return to the Contract Insight **Import Data** screen for the **PO Line Items** table and click **Choose File**.

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11. Find and select the file to be imported. Click **Process Data Upload**.



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Exporting PO Line Items

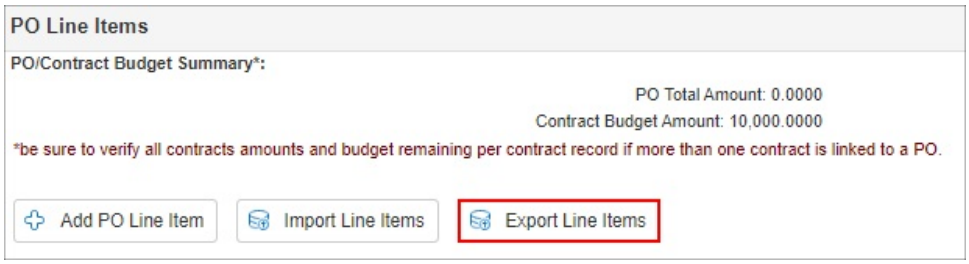
Exporting PO Line Items

Purchase Orders: Exporting Line Items

For each Purchase Order's **PO Line Items** section, users with the proper permissions can export the list of PO Line Items to a MS Excel spreadsheet.

1. Navigate to the **Purchase Order Details** screen you would like to export the PO Line Items for and scroll down to the **PO Line Items** section.

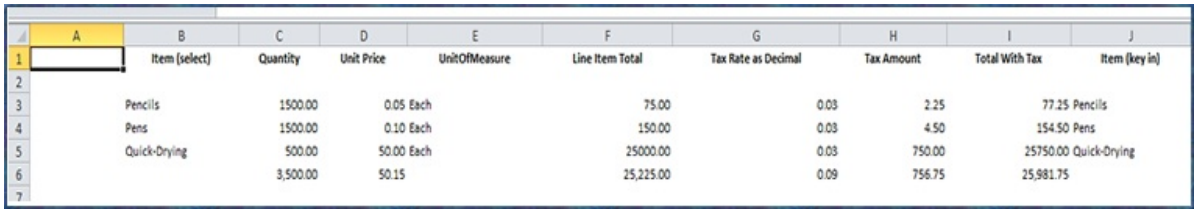
2. Click **Export Line Items** link to export the spreadsheet to an Excel file.



3. A prompt appears to confirm the site from which the file came is trusted because the spreadsheet is in a different file format. This is because the file is coming from a website, which will always have different file extensions because of their origin. Click **Yes** to proceed with opening the exported Excel spreadsheet of the PO Line Items.



4. Format the spreadsheet of the exported items as needed.



	A	B	C	D	E	F	G	H	I	J
1		Item (select)	Quantity	Unit Price	UnitOfMeasure	Line Item Total	Tax Rate as Decimal	Tax Amount	Total With Tax	Item (key in)
2										
3		Pencils	1500.00	0.05	Each	75.00	0.03	2.25	77.25	Pencils
4		Pens	1500.00	0.10	Each	150.00	0.03	4.50	154.50	Pens
5		Quick-Drying	500.00	50.00	Each	25000.00	0.03	750.00	25750.00	Quick-Drying
6			3,500.00	50.15		25,225.00	0.09	756.75	25,981.75	
7										

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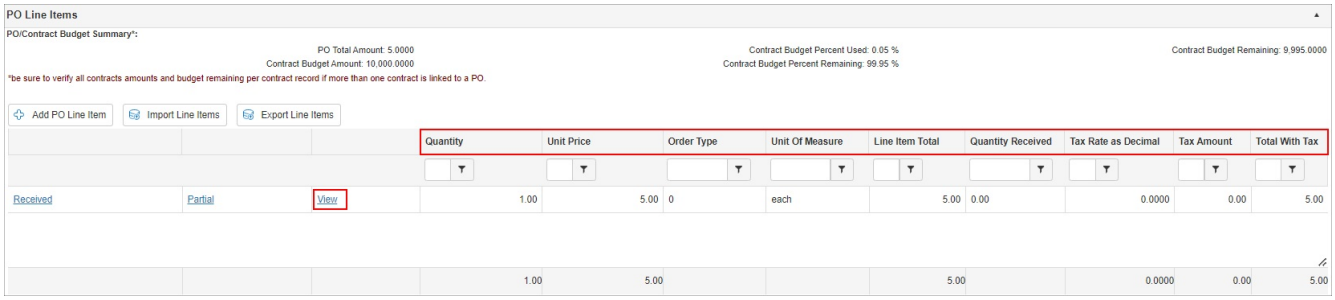
Filter/Sort PO Line Items

Filter/Sort PO Line Items

Purchase Orders: Filter/Sort Line Items

For the **PO Line Items** section of the Purchase Order Details screen, the grid displaying the PO Line Items details can be searched by either sorting or filtering the grid:

To Sort the PO Line Items List

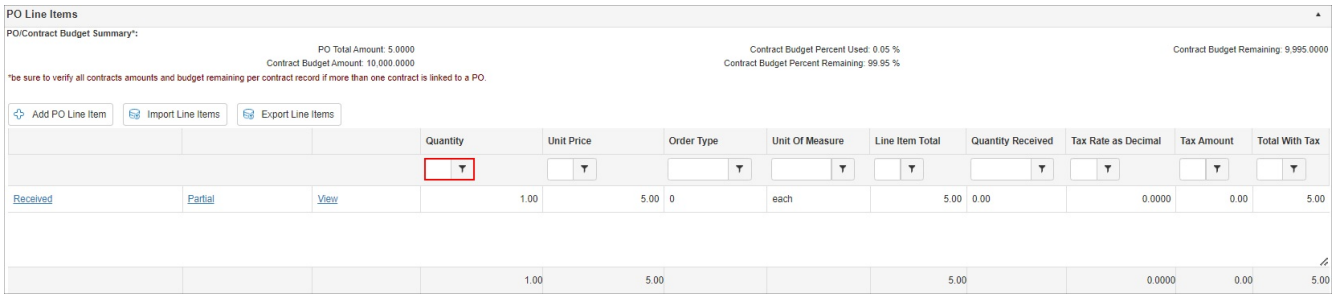


Click the name of the column by which to sort:

- Click the column name once to apply an ascending sort order
- Click the column name a second time to apply a descending sort order
- Click the column name a third time to remove the sort order from the grid

To Filter the PO Line Items List

Enter a keyword or keywords into one of the filter text boxes for the column by which to filter and then click the **filter icon** () to select how to filter the grid based on the keyword(s) entered.



To remove the filter from the grid, click the **filter icon** again and select the Remove Filter option.

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Create a PO from a Contract Record

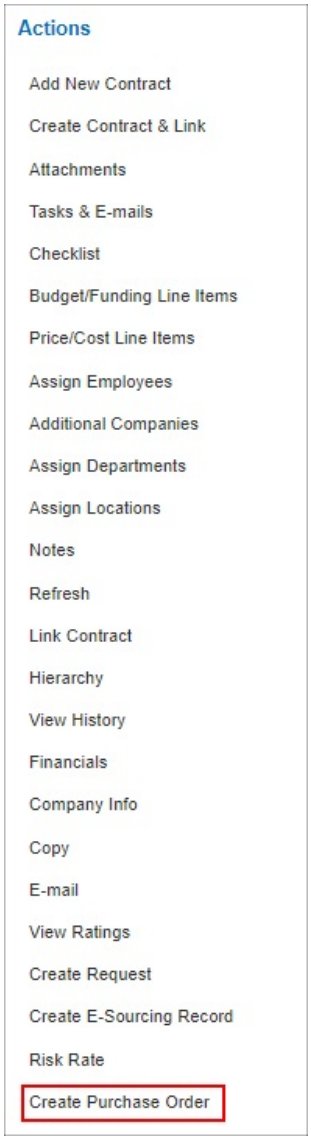
Create a PO from a Contract Record

Purchase Orders: Creation from a Contract Record

The optional Purchase Order module add-on can be used in concert with the contract module to create a purchase order directly from an existing contract in the system.

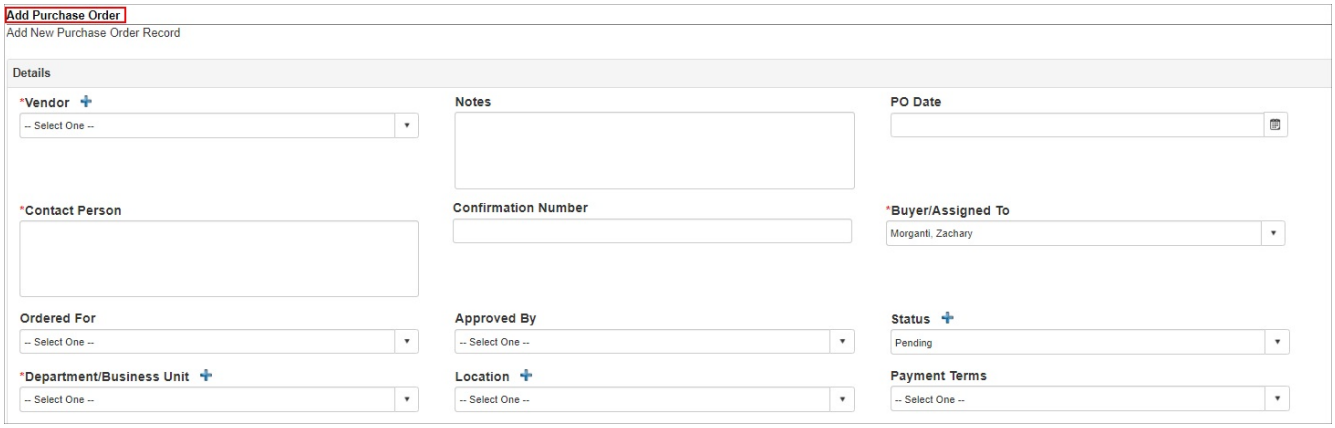
To Create a Purchase Order from a Contract Record

1. Navigate to the **Contract Details** screen for the Contract Record you would like to create a PO for and click **Create Purchase Order** on the side menu.



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2. The **Add Purchase Order** screen displays. Enter all required and necessary information about the Purchase Order to be submitted.



- All fields that have a **red asterisk** (*) to the left of the field means they are required to be populated.
- To add a new Company to the Company list, provided proper permissions are assigned, click **Add Company** at the top of the page to quickly add a new Company name for it to appear in the Vendor/Customer drop down to be selected for this PO.

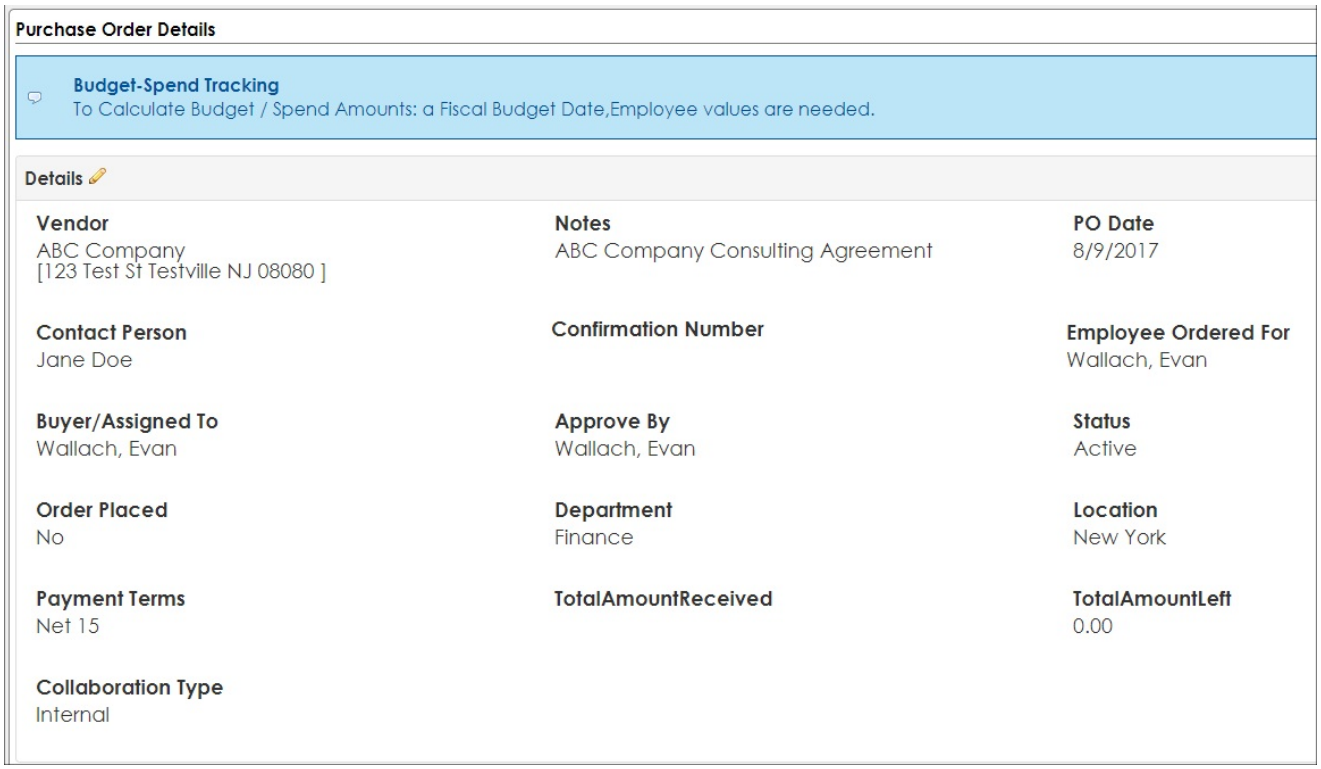
Notes:

Once as new company via **Add Company**, after the PO has been completed, go to the new Company's Company Details screen to fill out any additional information about the Company that should be recorded. Please see the View and Edit Company/Vendor Wiki page for more information about navigating to and editing the Company Details screen.

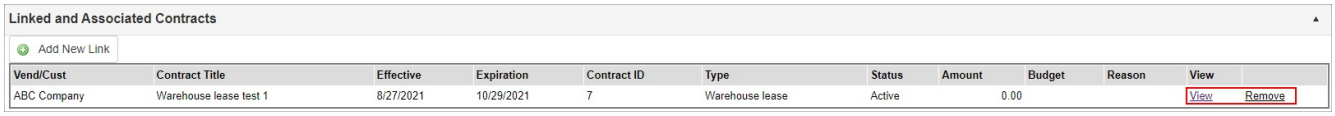
The fields displayed on the **Add Purchase Order** screen can be added to and modified by a System Administrator or an Administrator with the proper permissions. Please see the Manage PO Fields (PO Details Screen) Wiki page for more information about managing fields on the PO Details screen.

3. Once all required and necessary information has been entered, click **Save & Continue** to save the new PO. The PO's Details screen displays.

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4. At the bottom of the Purchase Order Details screen, the Contract Record from which the PO was created is automatically linked and displayed in the **Linked and Associated Contracts** section of the screen.



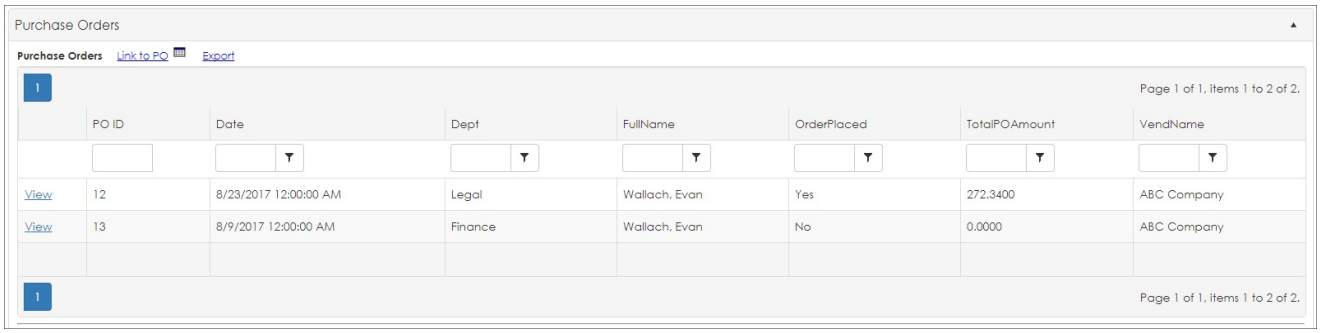
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Contract Details PO Line Item Grid

Contract Details PO Line Item Grid

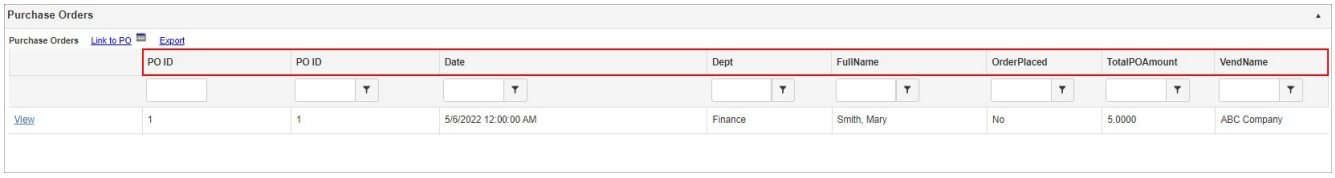
Purchase Orders: Line Item Grid

To access the Purchase Orders Line Item Grid on the Contract Details screen, scroll down the **Contract Details** screen to the **Purchase Orders** section.

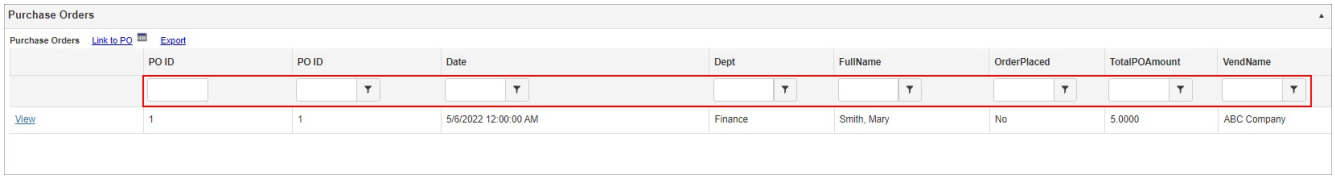


The Purchase Orders grid displays the details of any Purchase Orders that are linked to this Contract Details record. In addition, the grid also has the following functionalities:

1. Sorting the Purchase Orders Grid



2. Filtering the Purchase Orders Grid

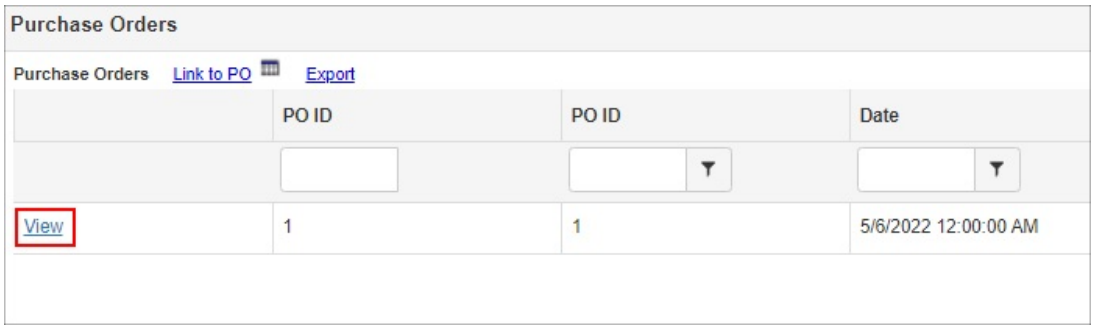


3. Exporting the Purchase Orders Grid

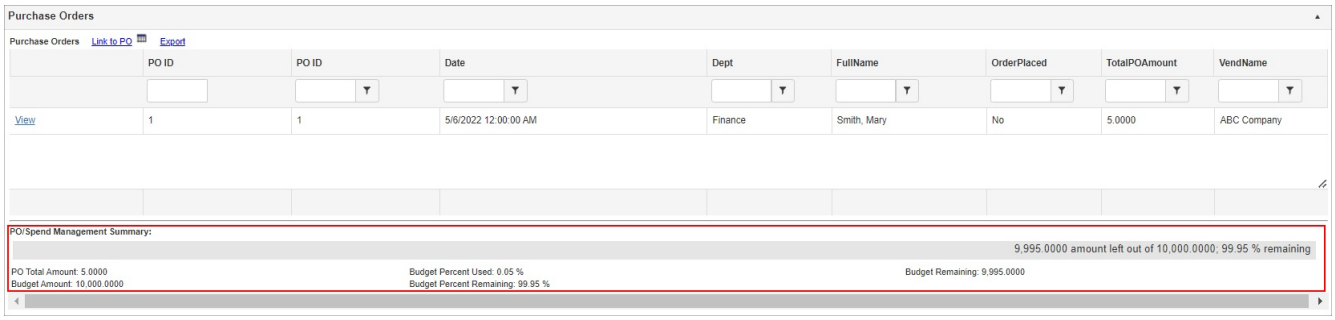
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4. View the Purchase Order Details



5. PO Management Summary



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Link a Contract to a PO

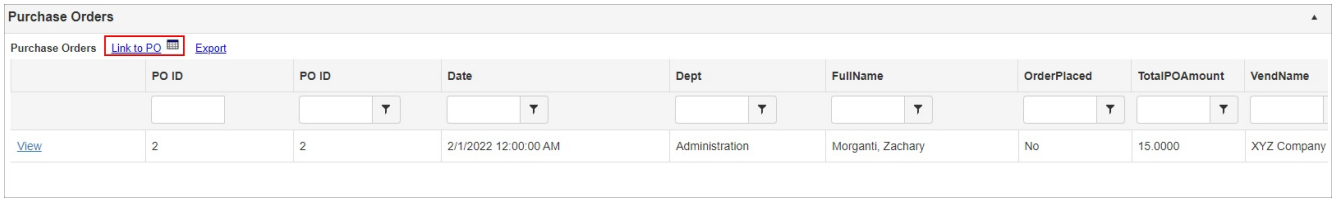
Link a Contract to a PO

Purchase Orders: Link a Contract to a PO

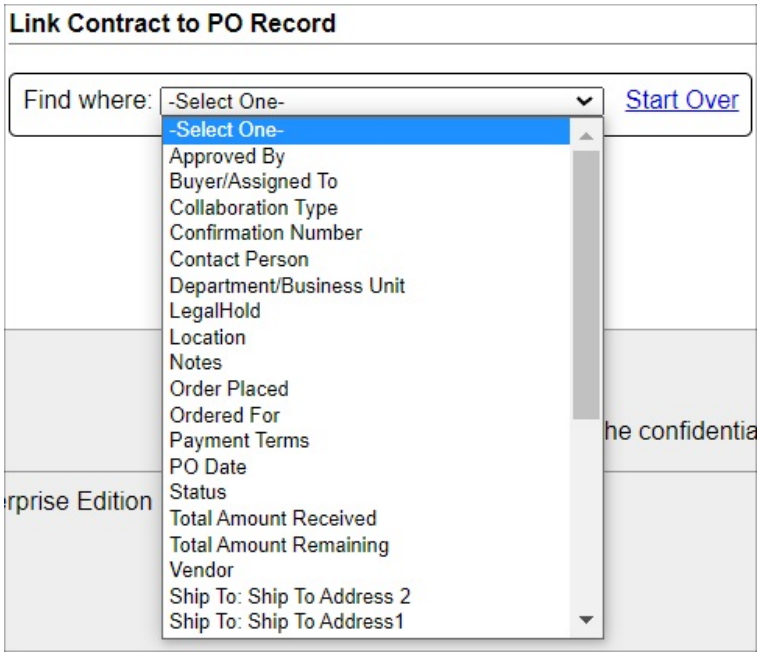
Contract Insight allows permitted users to create a link between existing purchase orders and contract records.

To Link a Contract Record to a Purchase Order

1. Navigate to the **Contract Details** screen of the contract record to which a Purchase Order is to be linked.
2. Scroll down the **Contract Details** screen to the **Purchase Orders** section and click **Link to PO**.

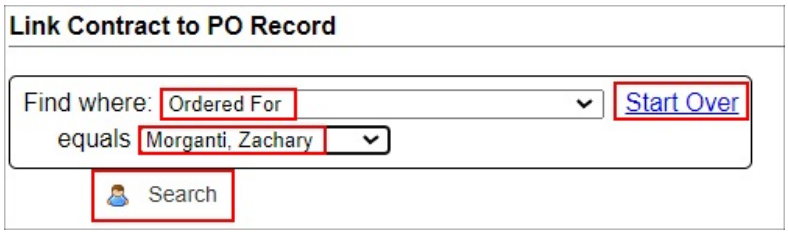


3. The **Link Record** screen displays. Select a **Purchase Order Details field** by which to search.



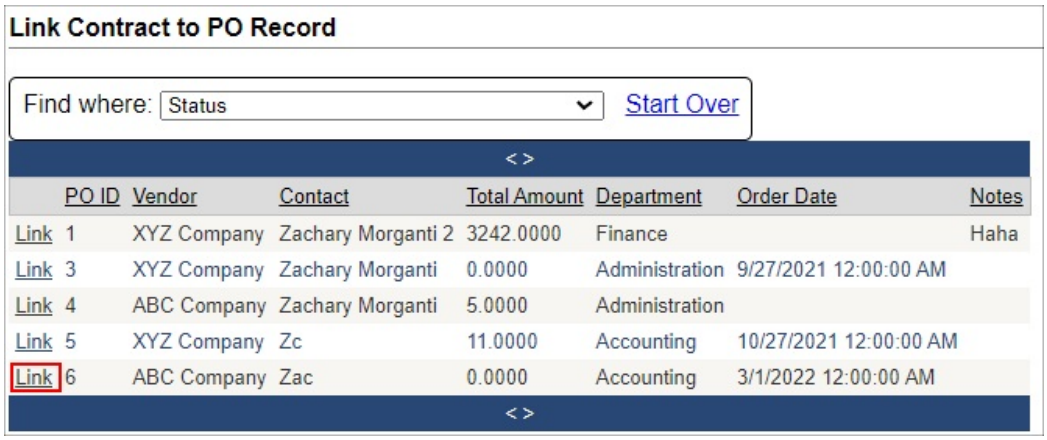
4. Upon selecting the **PO Details** field, select or enter (depending on the type of field selected) the value by which to search and then click **Search**.

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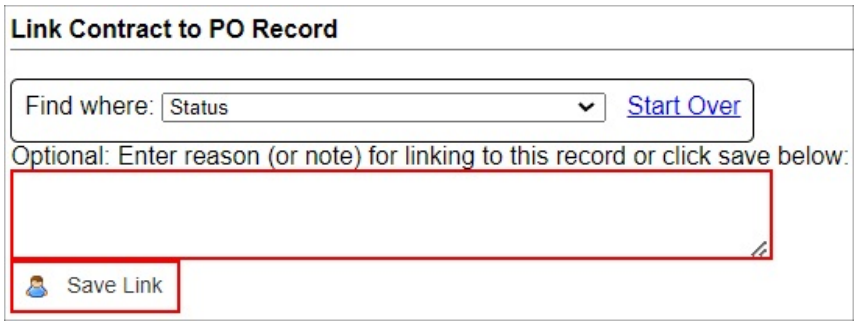


Note: To change the field by which searching is performed, click **Start Over** to refresh the search drop-down.

5. A results grid of Purchase Orders existing in the application that meet the specified criteria displays.



6. Click **Link** for the Purchase Order line to create a link to for the Contract Record.



7. Optionally, enter a note/reason for creating the link. Click **Save Link** to save the link and return to the Contract Details' **Purchase Orders** section.

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Overview

Overview

Purchase Orders: Inventory Management Overview

Inventory (Asset) management is made possible through the optional add-on Purchase Order module. Partial or complete fulfillment of line items, single click to fulfill an entire order, PO consolidation, items listing for use across purchase orders, full asset tracking, and requested item fulfillment are all available through the module.

Note: When adding items to the list, a vendor must be selected.

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Partial Fill of an Individual Line Item

Partial Fill of an Individual Line Item

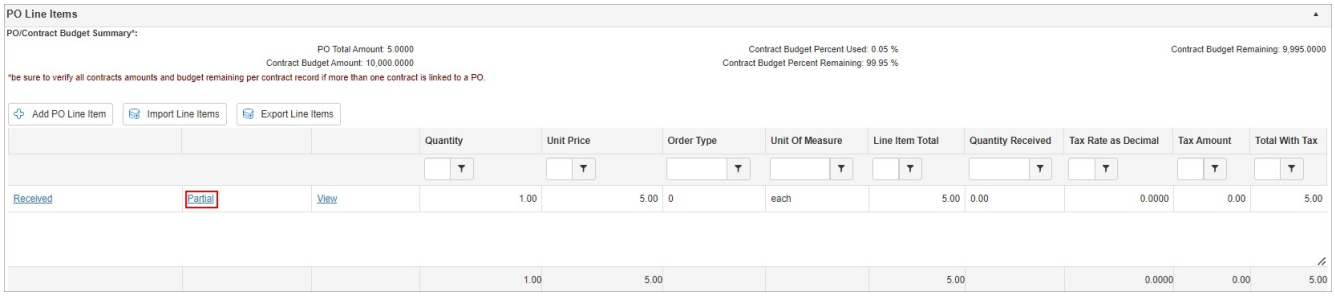
Purchase Orders: Partial Fill of an Individual Line Item

When receiving items from a processed purchase order, if the line item is not delivered in full, a partial receipt can be processed.

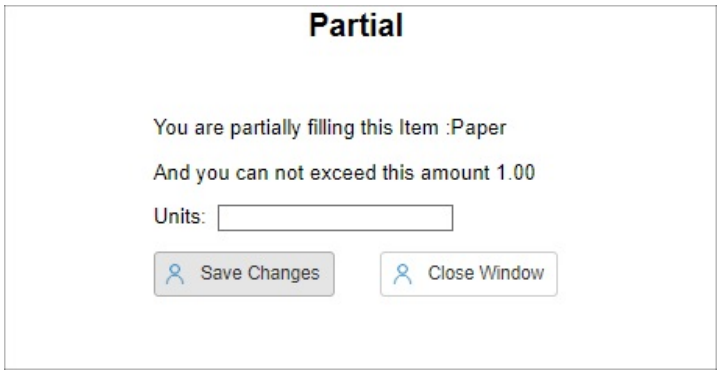
Receive a Partial Fill

1. Navigate to the desired **Purchase Order Details** screen. Scroll down to the **PO Line Items** area.

2. For the received item, click **Partial**.



3. A pop-up window displays. Enter the amount received and click **Save Changes**.



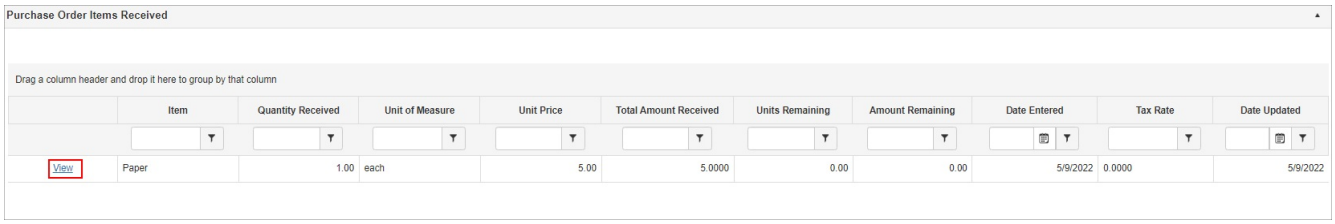
4. Close the pop-up window.

View Items Received

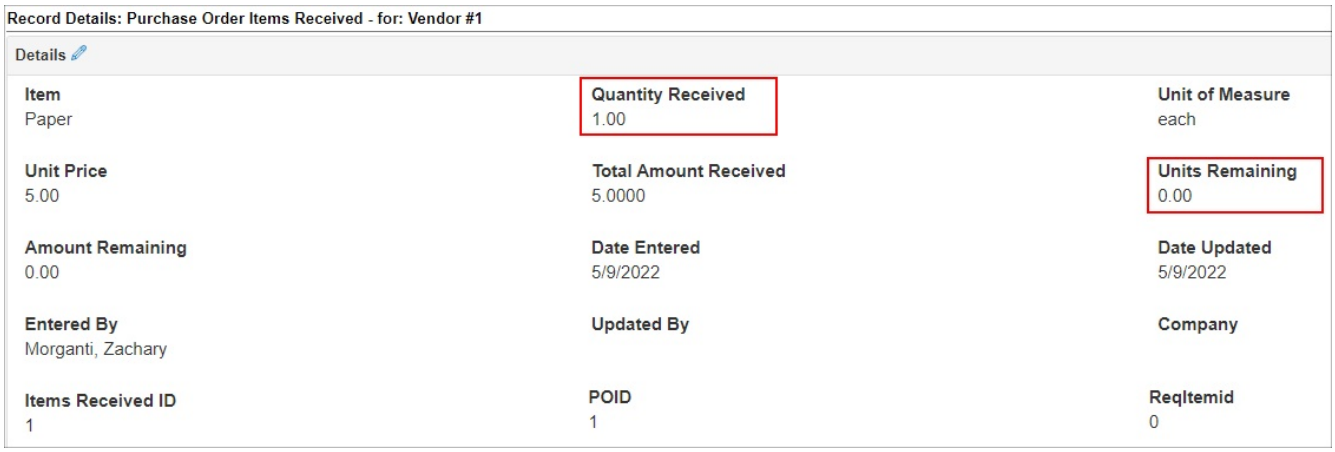
1. Scroll to the **Purchase Order Items Received** area of the **Purchase Order Details** screen.

2. The grid displays all items received.

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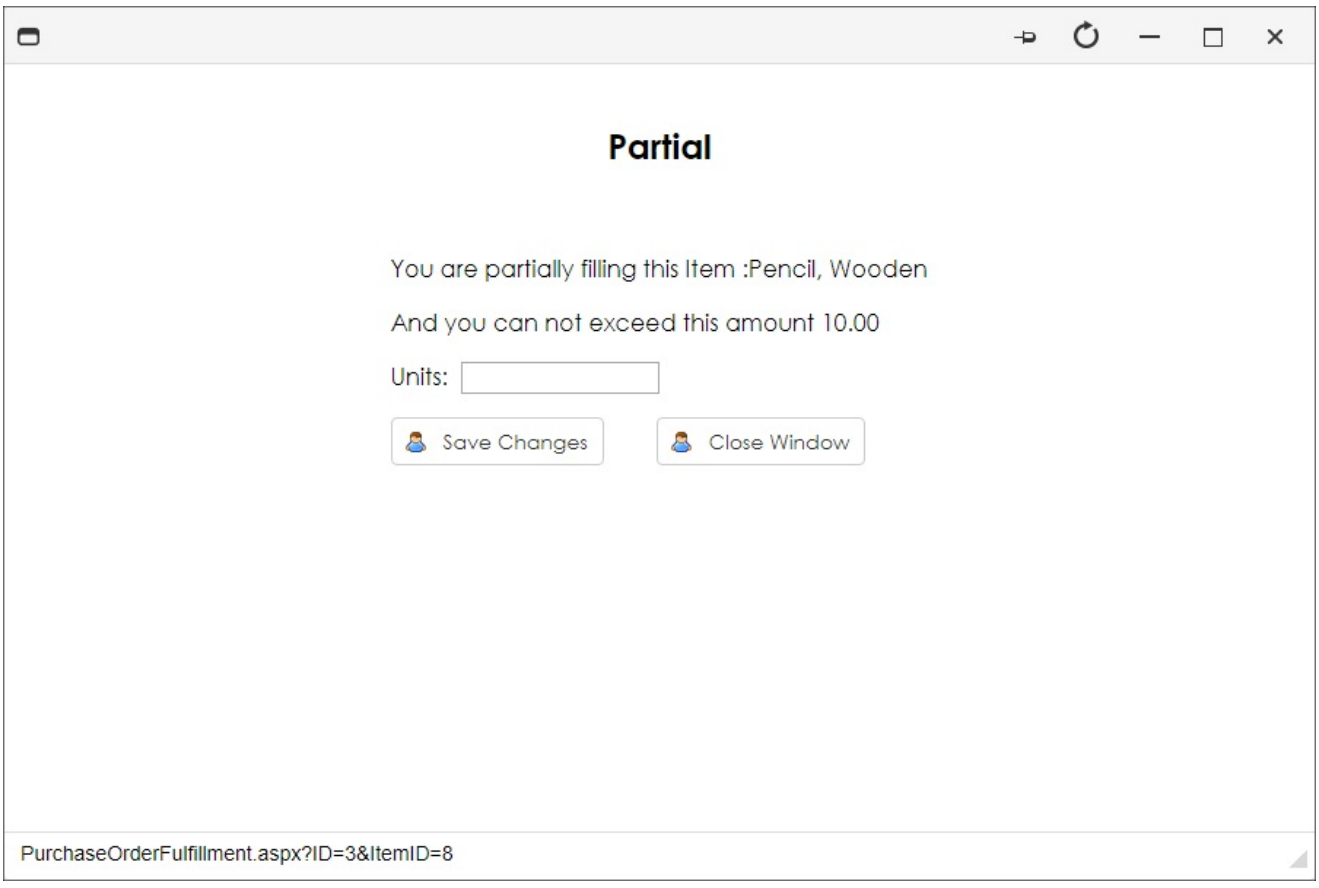


3. Click **View** for the desired line item to view the details of the receipt.



Receiving Additional Items

When receiving additional items for a line item, the pop-up window shows the amount remaining for the purchase order.



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Complete Fulfillment of an Individual Line Item

Complete Fulfillment of an Individual Line Item

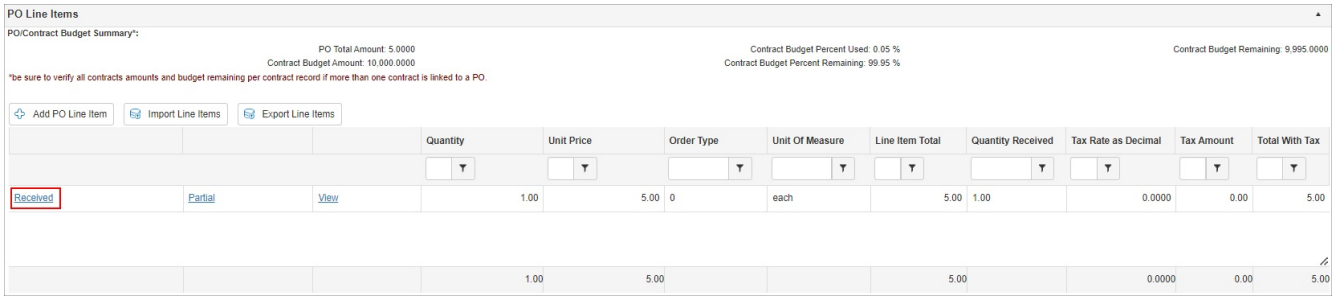
Purchase Orders: Complete Fulfillment of an Individual Line Item

When receiving items from a processed purchase order, if the line item is not delivered full, a complete receipt can be processed.

Receive a Complete Fill

1. Navigate to the desired **Purchase Order Details** screen. Scroll down to the **PO Line Items** area.

2. For the received item, click **Received**.



3. A pop-up window displays to confirm the total receipt.



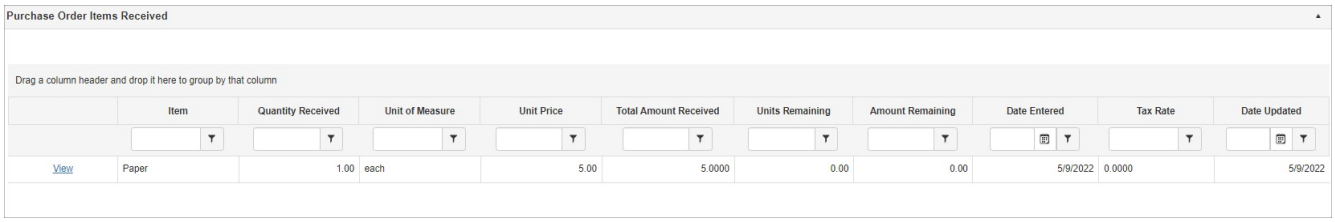
4. Click **OK** to complete the receipt or **Cancel** to abandon the receipt.

View Items Received

1. Scroll to the **Purchase Order Items Received** area of the **Purchase Order Details** screen.

2. The grid displays all items received. The line item indicates that all items were received and that none remain for the work order.

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One Click Fulfillment

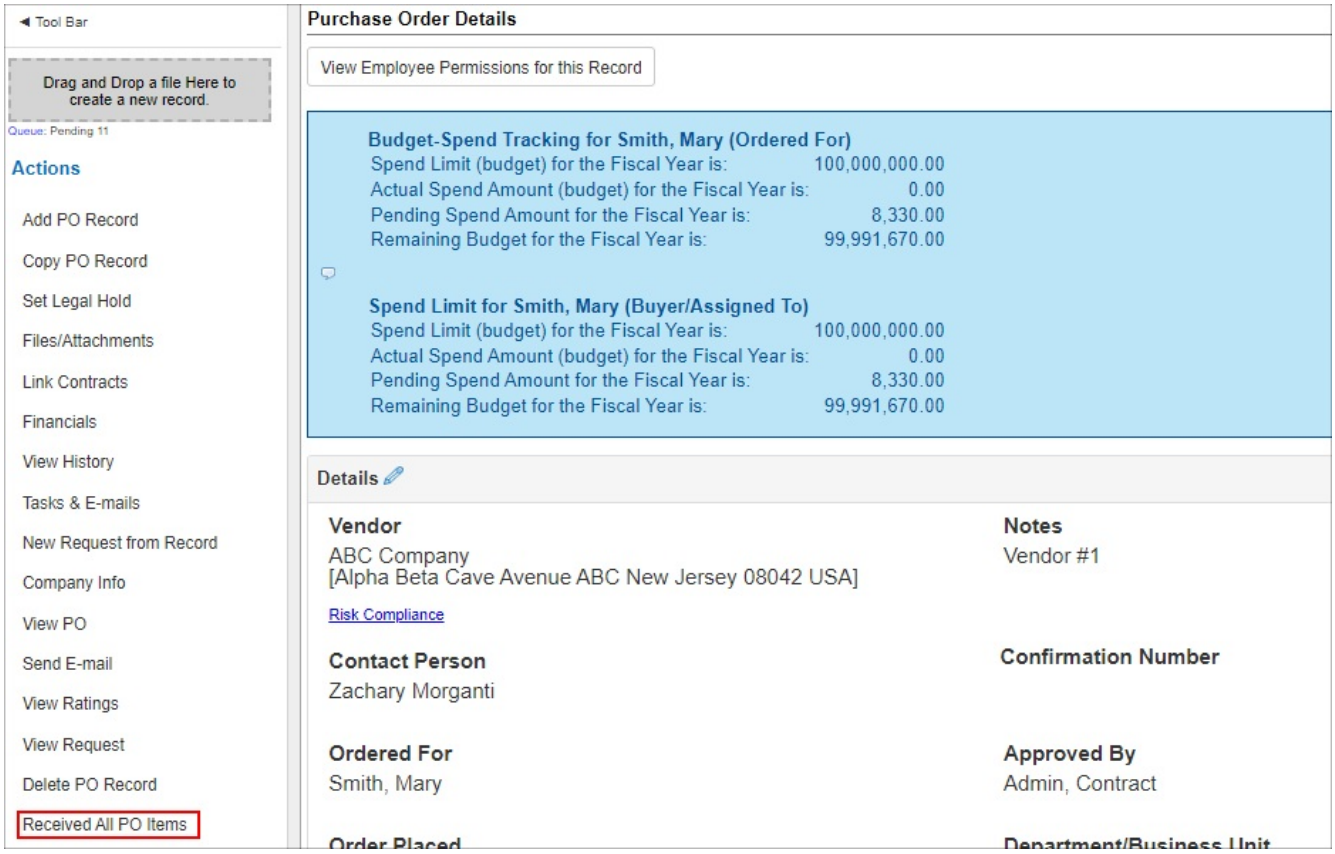
One Click Fulfillment

Purchase Orders: One Click Fulfillment of the Entire Order

For users with permission to fill purchase orders, Contract Insight offers a solution to fulfill an entire order with just one click.

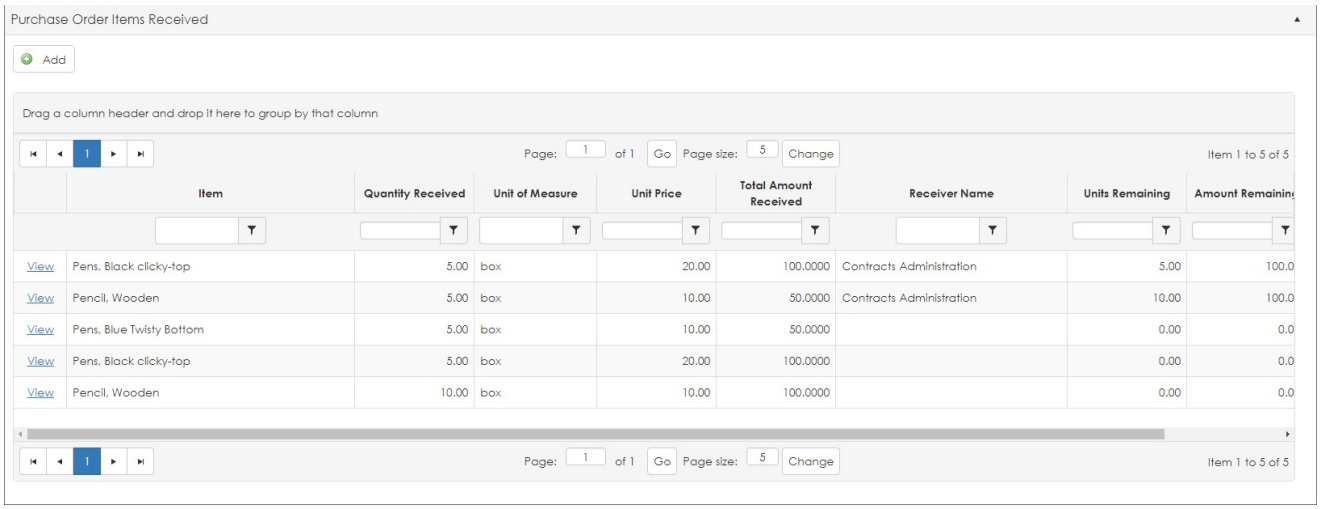
1. Navigate to the purchase order's details screen.

2. On the side menu, click **Received All PO Items**.



3. View the order, as viewed in full in the Purchase Order Items Received area.

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Note: Items and quantities are listed in the grid as they are received. If a partial fulfillment was processed, each receipt is logged separately.

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Asset Tracking

Asset Tracking

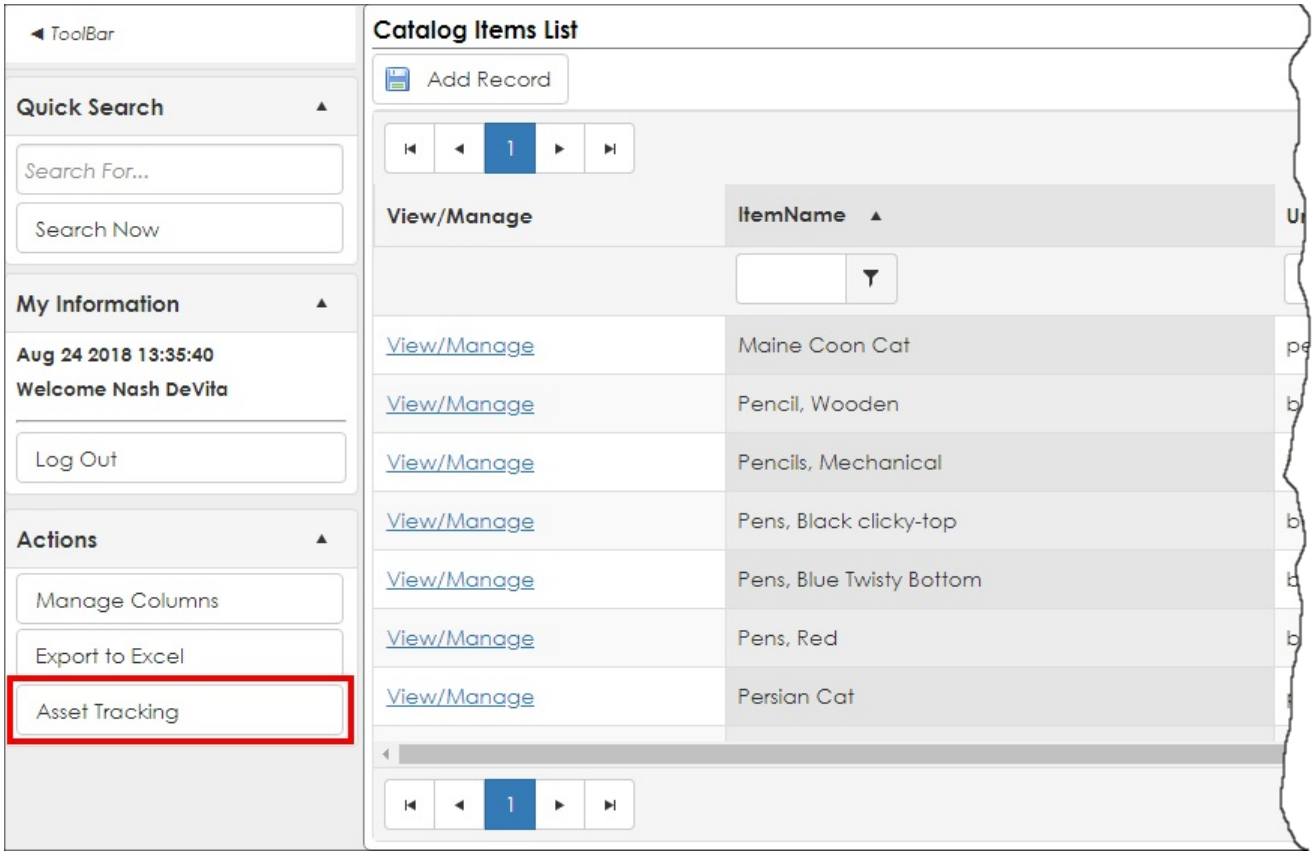
Purchase Orders: Asset Tracking

Asset Tracking is a transaction log of items and by whom they were ordered. The grid contains the item name, quantity, date entered, and the name and department on PO. Asset management is also handled here. Users with proper permissions can navigate directly to a PO for a line item, apply shrinkage, perform location transfer, and fulfill all possible open purchase orders.

View the Asset Tracking Log

1. Navigate to the **Item List** page.

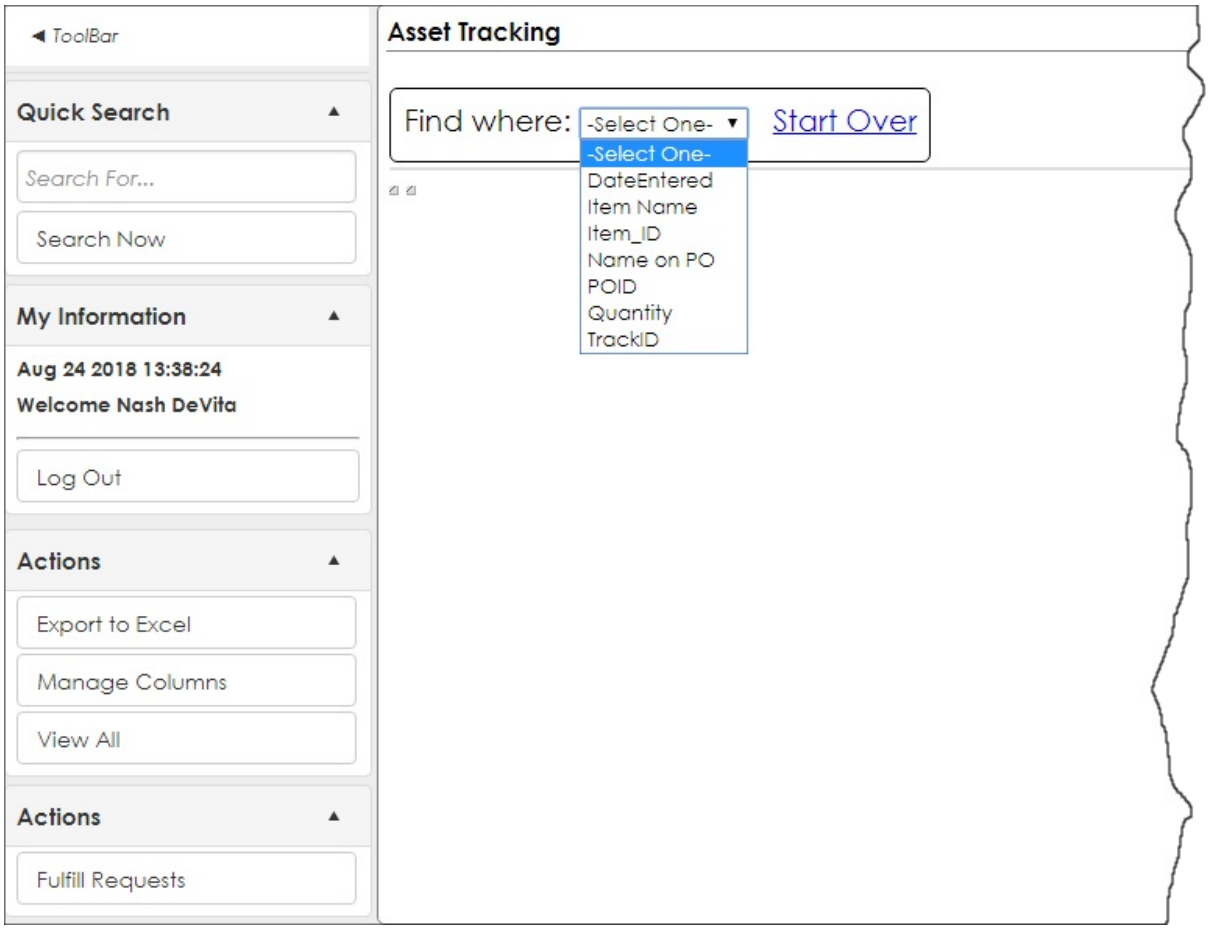
2. Click **Asset Tracking**.



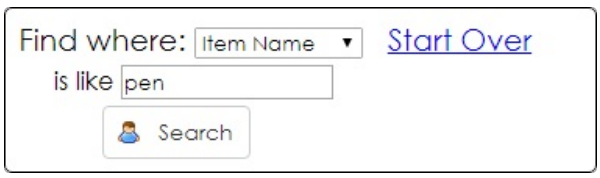
3. Search for the item via **Find where** or click **View All** to view a list of all items in inventory.

If searching via **Find where**, select the field on which to base the search.

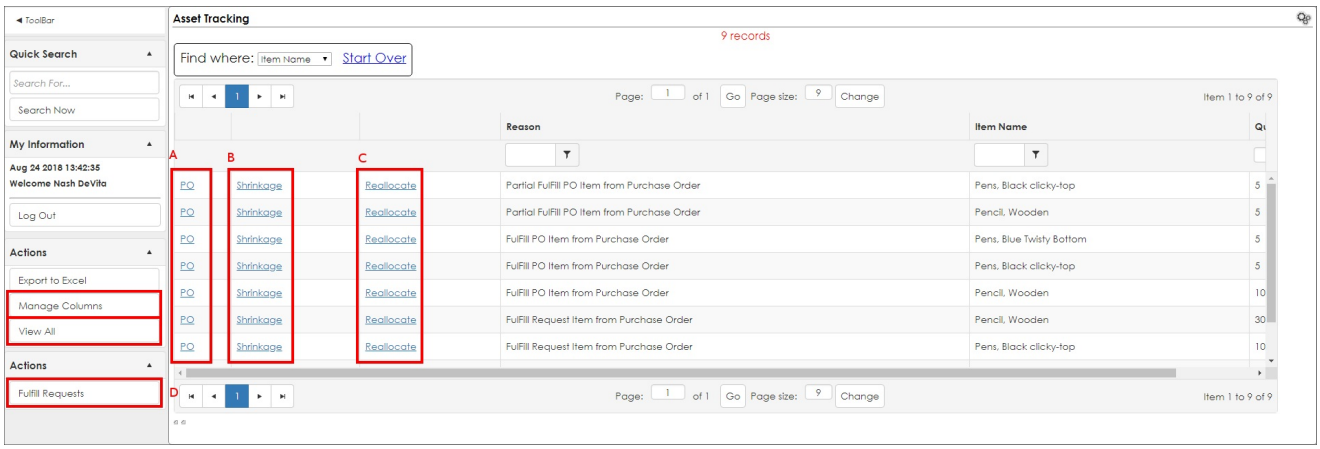
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Enter a search string.



4. The results grid displays with all items meeting the search criteria (or all items). Review the data.



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Note: To modify the columns visible, click **Manage Columns**.

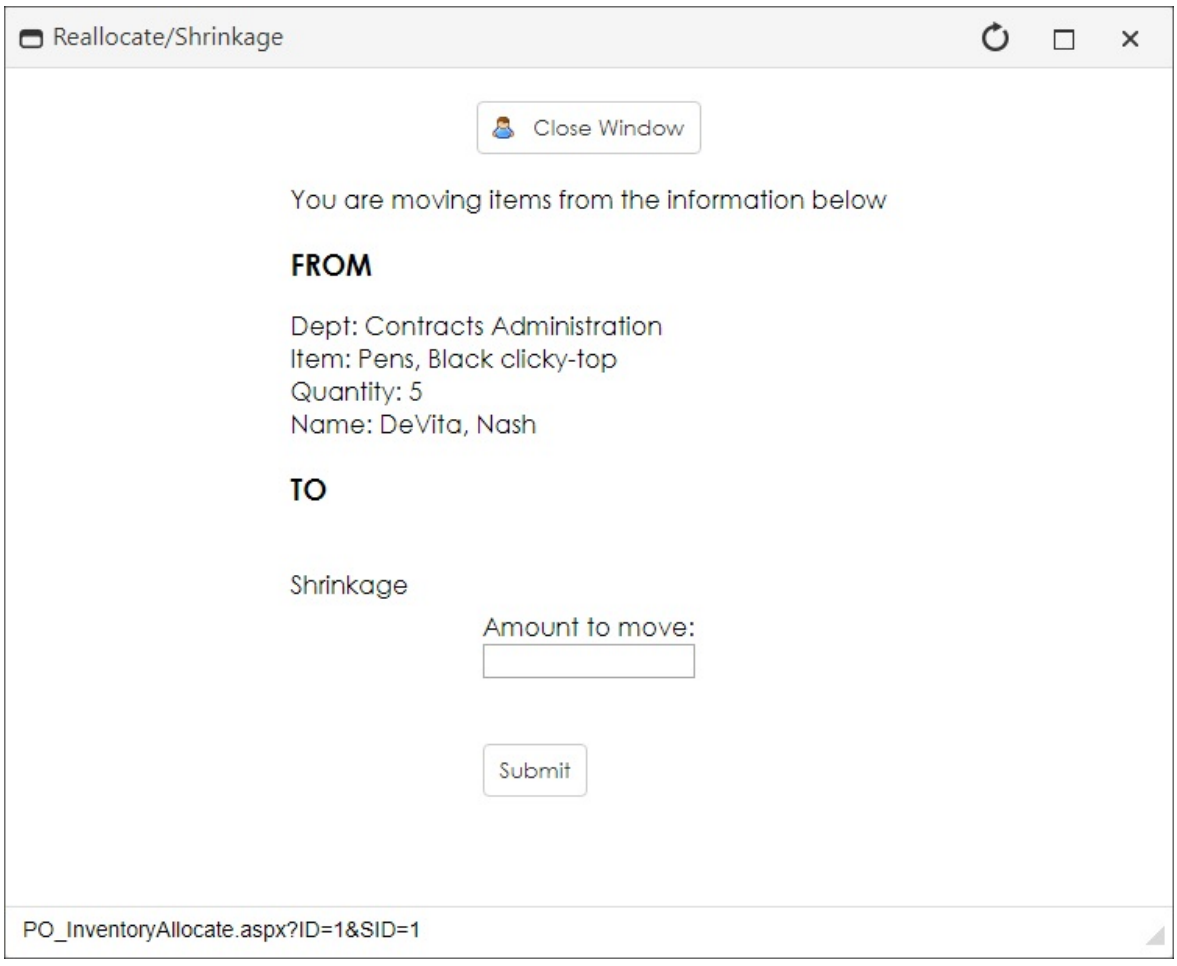
From the search grid, users have multiple options.

A. View the Purchase Order

Click **PO** to navigate to the **Purchase Order Details** Screen for the related PO.

B. Manage Shrinkage

i. Click **Shrinkage** for the line item to indicate that a quantity is not on hand due to damage, end of life use, etc.



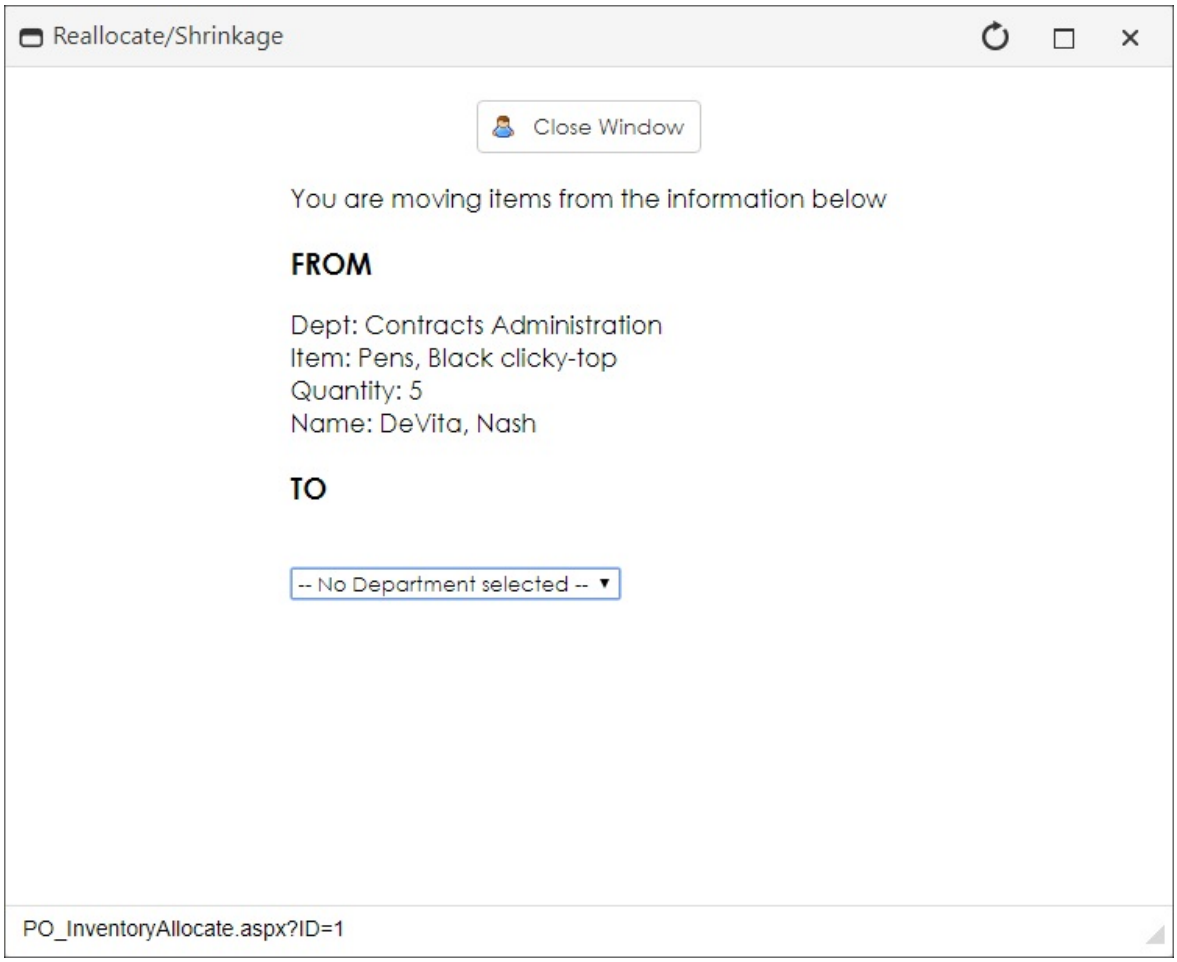
ii. Enter the quantity of shrink and click **Submit**.

C. Reallocate a Quantity

Click **Reallocate** to move a quantity from one department to another.

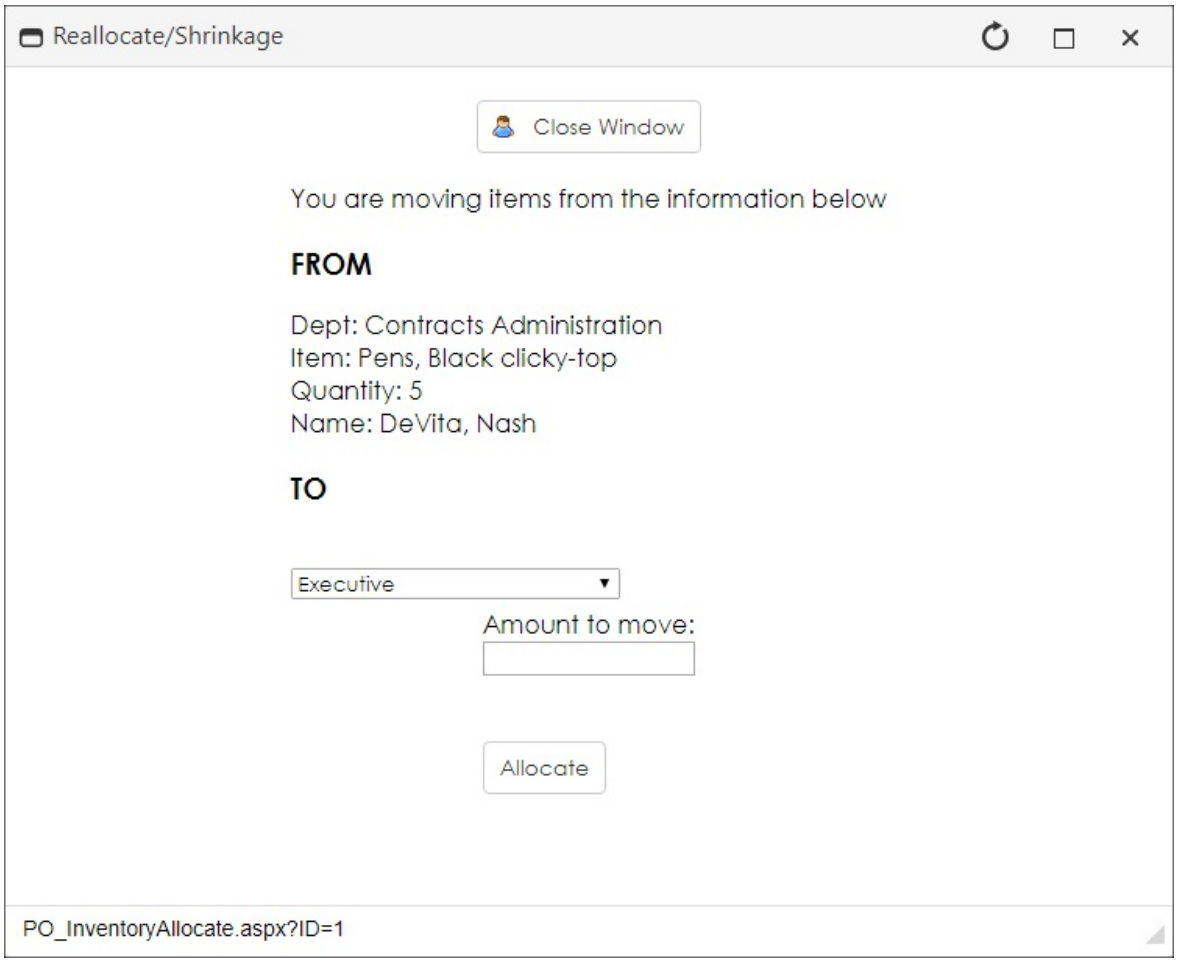
i. Select the department to which the quantity is to be moved.

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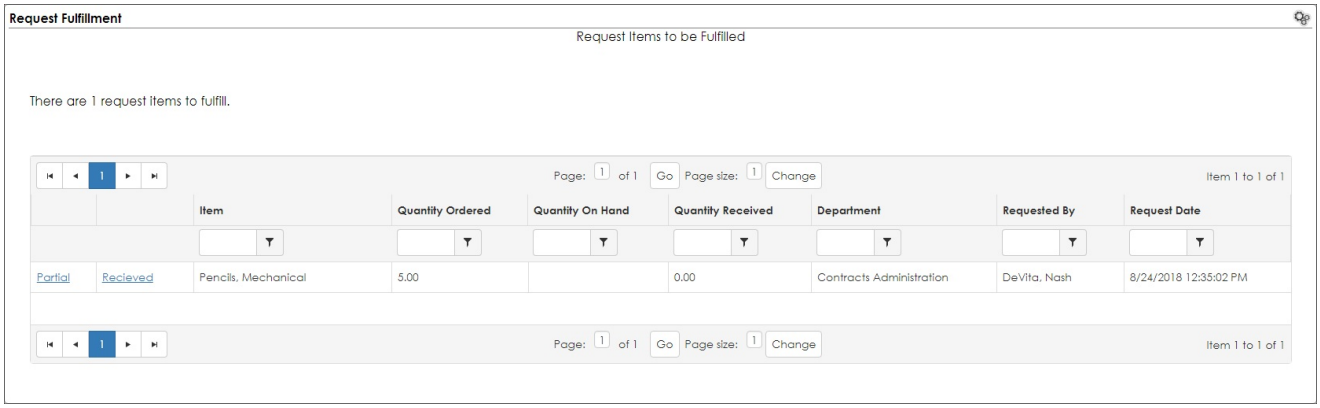
ii. Enter the quantity to be moved and click **Allocate**.

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D. Fulfill Requests

Click **Fulfill Requests** to view all item requests open and perform a partial or complete fulfillment as within a PO itself.



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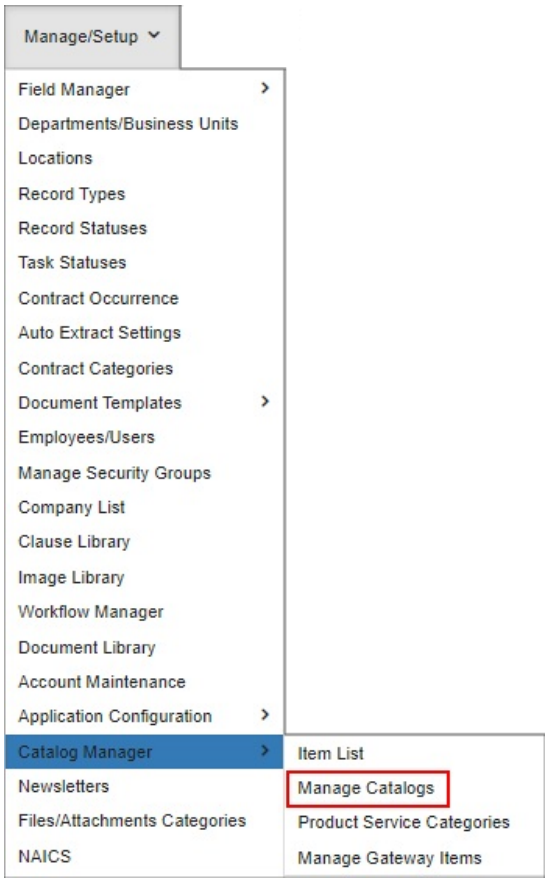
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Manage Catalogs

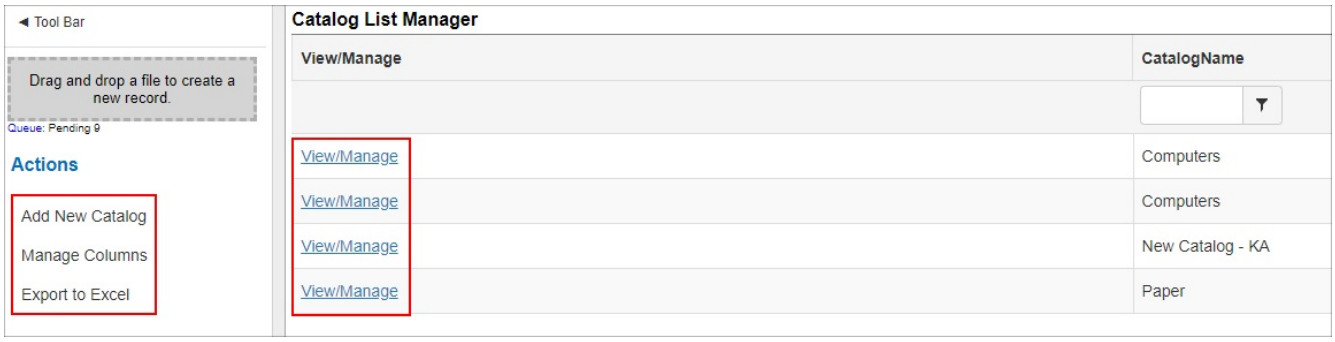
Manage Catalogs

Catalog Manager

Navigate to **Manage/Setup** > **Catalog Manager** > **Manage Catalogs**

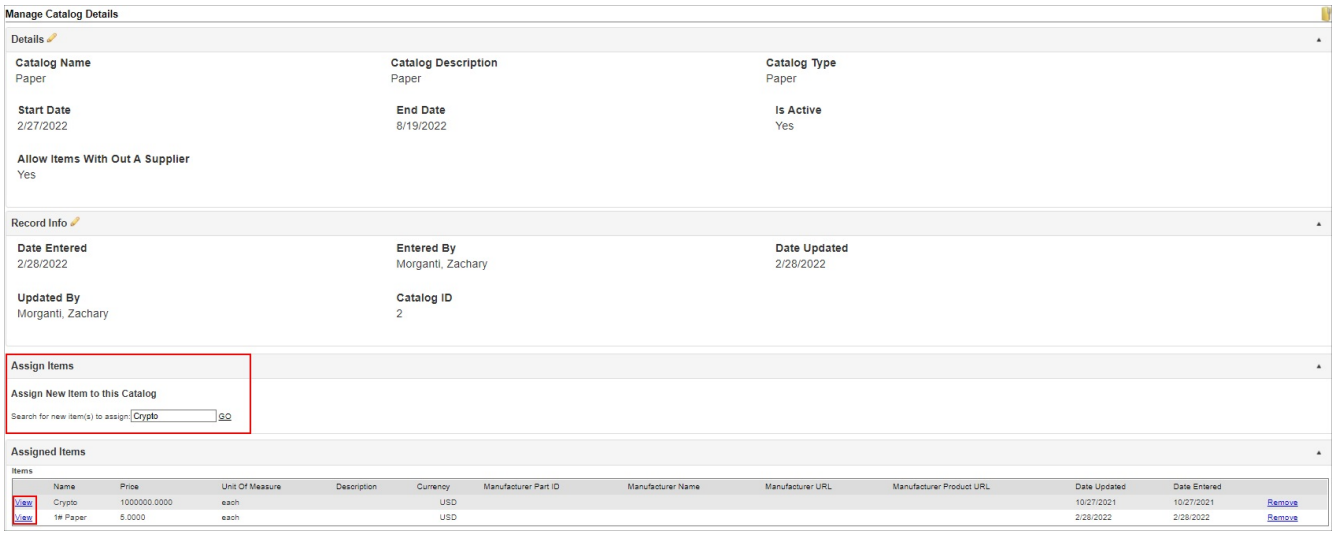


You can add a new catalog via the side menu action **Add New Catalog** or if you have a catalog you can **View/Manage**



Once you are viewing **Catalog Details** you can assign items to the catalog via the item search

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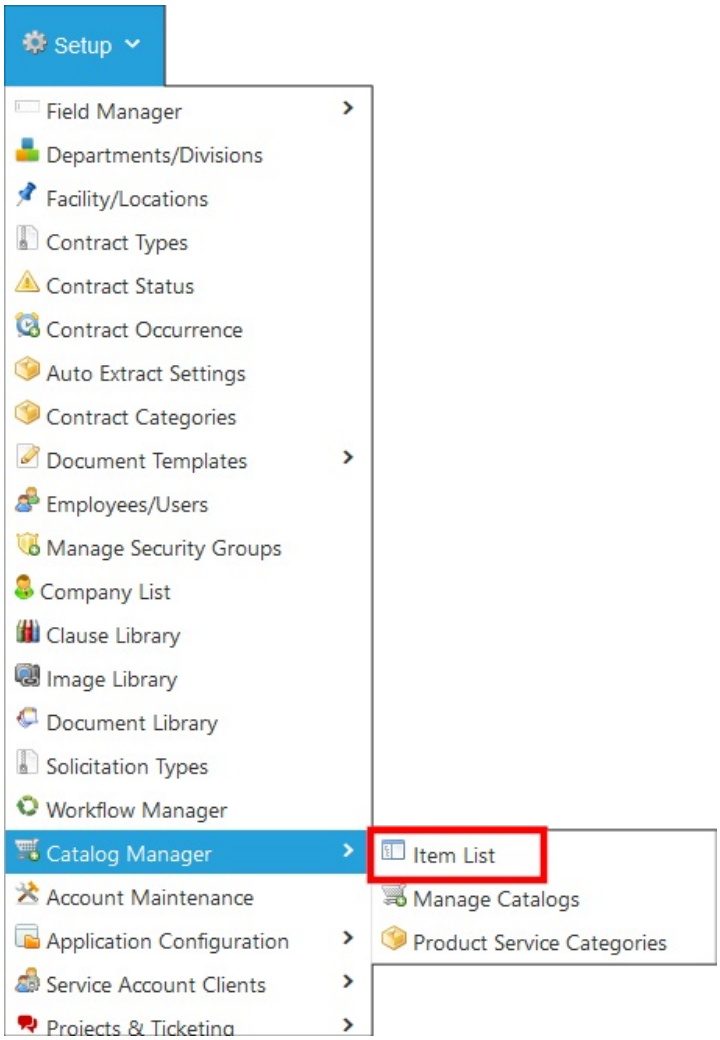
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Catalog Item Management

Catalog Item Management

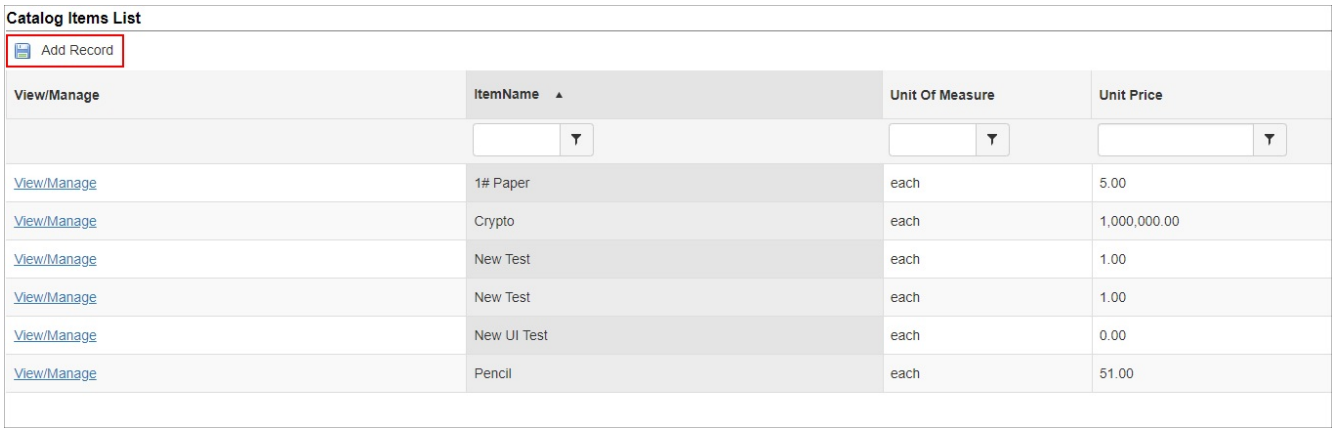
Catalog Items

Navigate to **Manage/Setup** > **Catalog Manager** > **Item List**



You can add individual records via the **Add Record Button** and fill out necessary details during creation and are always able to click on **View/Manage** to edit details later

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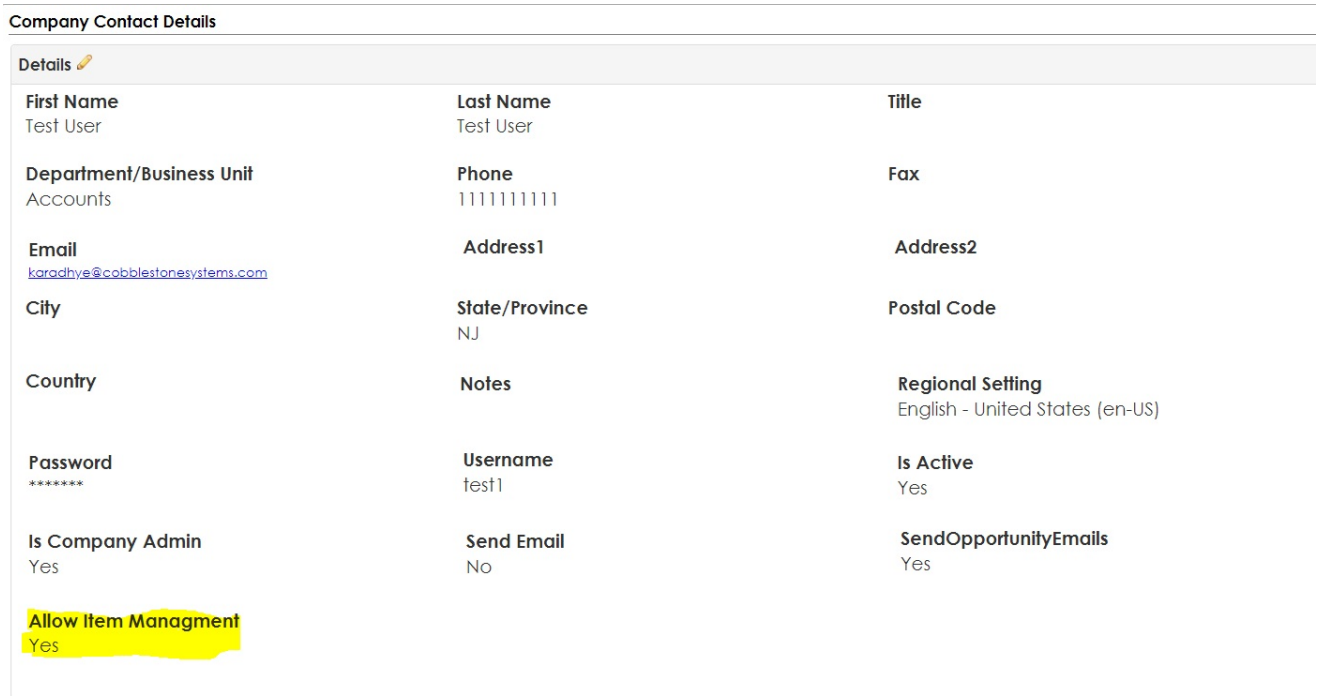
Vendor/Client Gateway Catalog Items

You are also able to allow Vendor contacts to add items via the Vendor Client Gateway module.

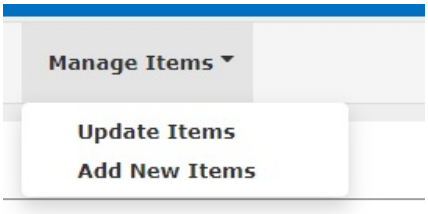
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An admin can authorize company contact that is a VCG user to be able to upload item through VCG or not.

While adding/editing user configure the setting.



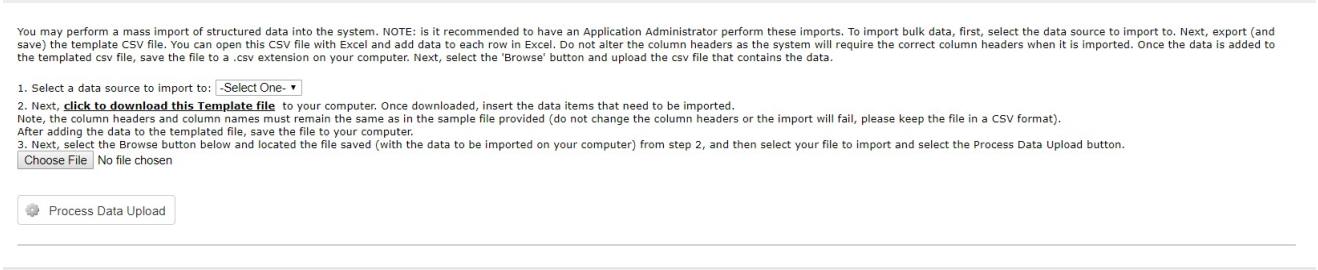
When user logins through VCG and has allowed Item Management, he will have top menu to manage items.



User will have two options, Update existing items and New Items.

Add New Items:

When user clicks on Add New Items, following screen will be displayed.



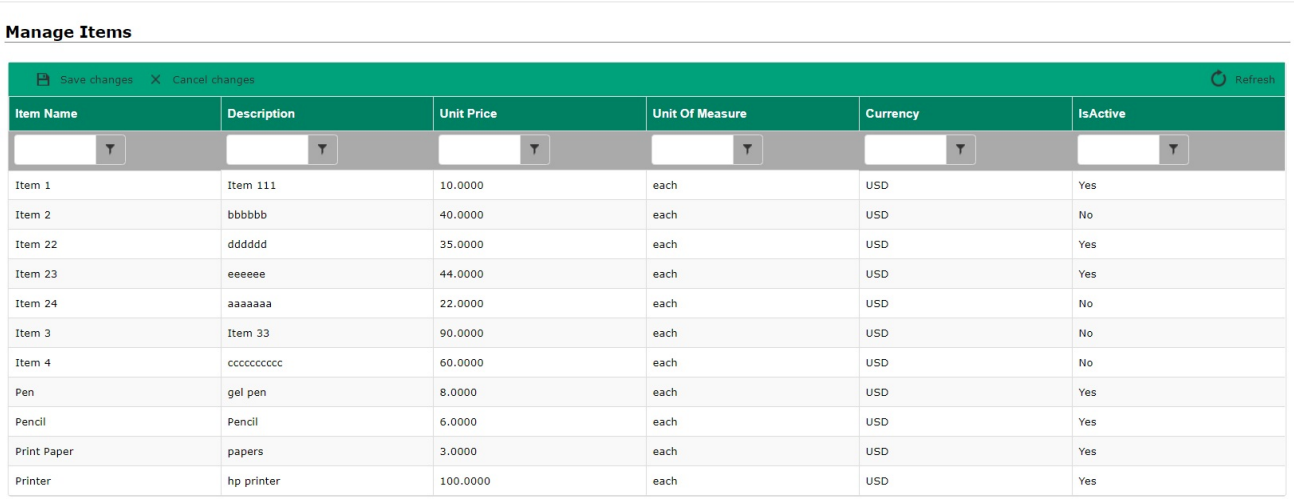
Using above screen user can download template, fill that template with item details and then upload back. And once user clicks on Process Data Upload, all items will get uploaded.

But these items will need Admin approval before its available. This part will be explained later in the document.

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Edit Items:

When user clicks on Update Items, following screen will be displayed.

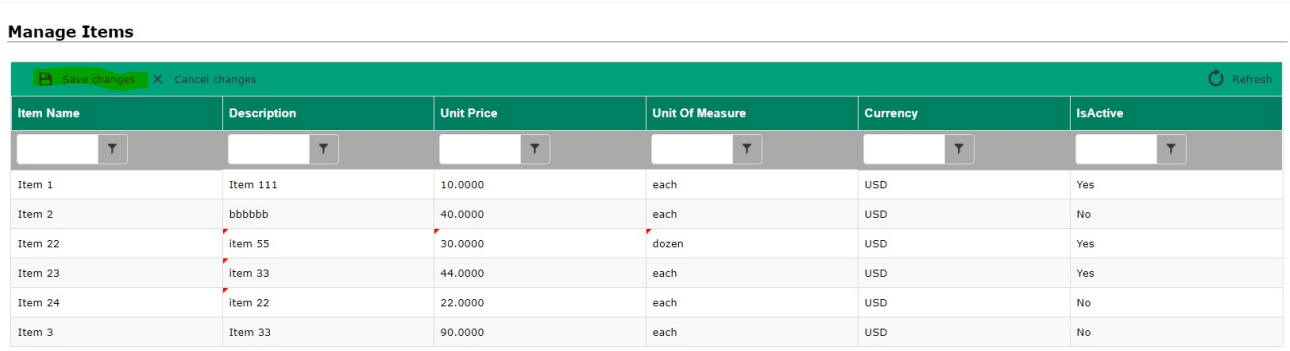


Item Name	Description	Unit Price	Unit Of Measure	Currency	IsActive
Item 1	Item 111	10.0000	each	USD	Yes
Item 2	bbbbbb	40.0000	each	USD	No
Item 22	dddddd	35.0000	each	USD	Yes
Item 23	eeeeee	44.0000	each	USD	Yes
Item 24	aaaaaaa	22.0000	each	USD	No
Item 3	Item 33	90.0000	each	USD	No
Item 4	ccccccccc	60.0000	each	USD	No
Pen	gel pen	8.0000	each	USD	Yes
Pencil	Pencil	6.0000	each	USD	Yes
Print Paper	papers	3.0000	each	USD	Yes
Printer	hp printer	100.0000	each	USD	Yes

User can edit description, unit price and Unit of Measure. By clicking in column user can edit these values and once done Click on Save Changes button. All edited items information will get saved.

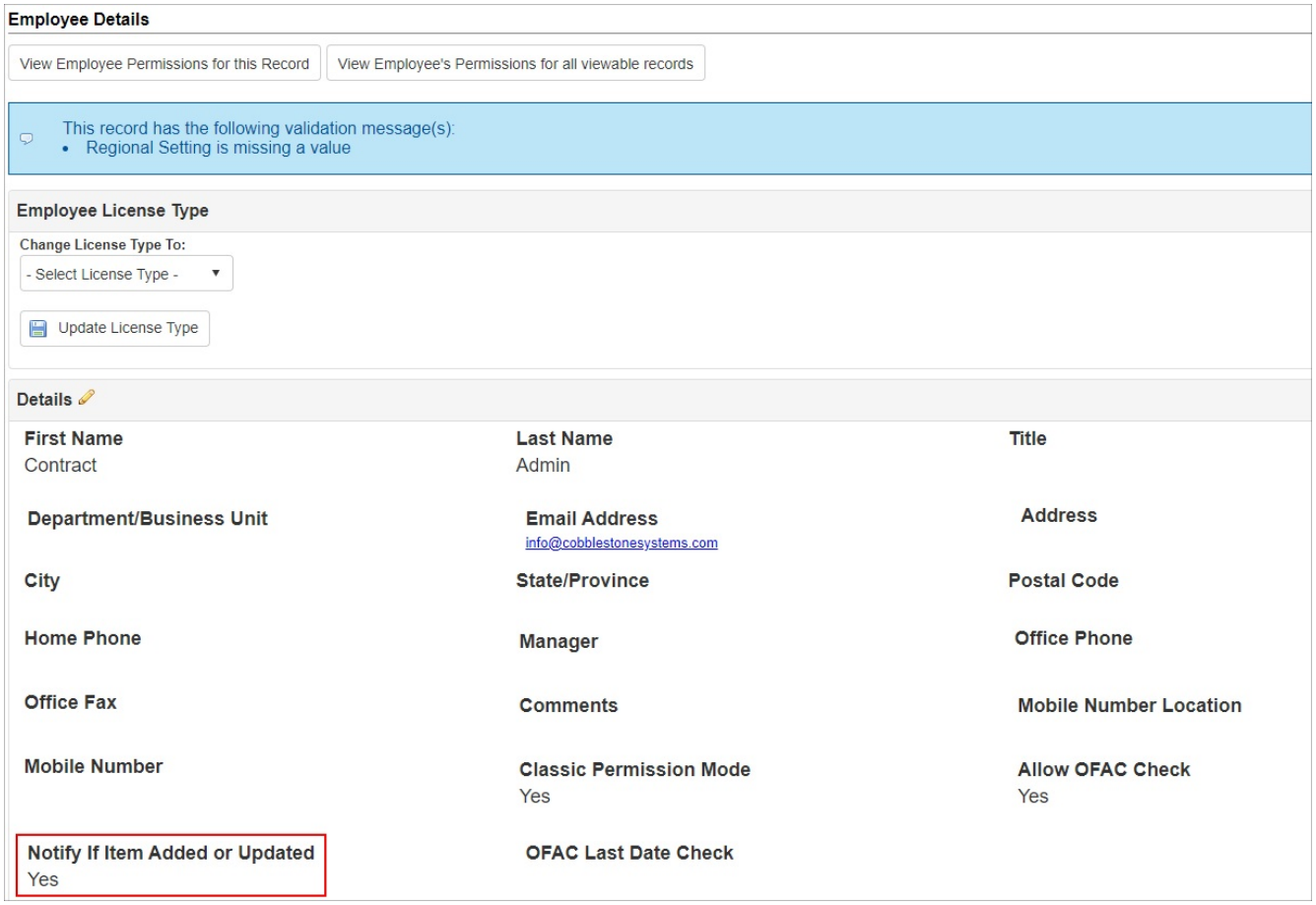
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Whenever new item uploaded or updated existing item, the user with Notify If Item Added or Updated set to Yes, will get email notifications.

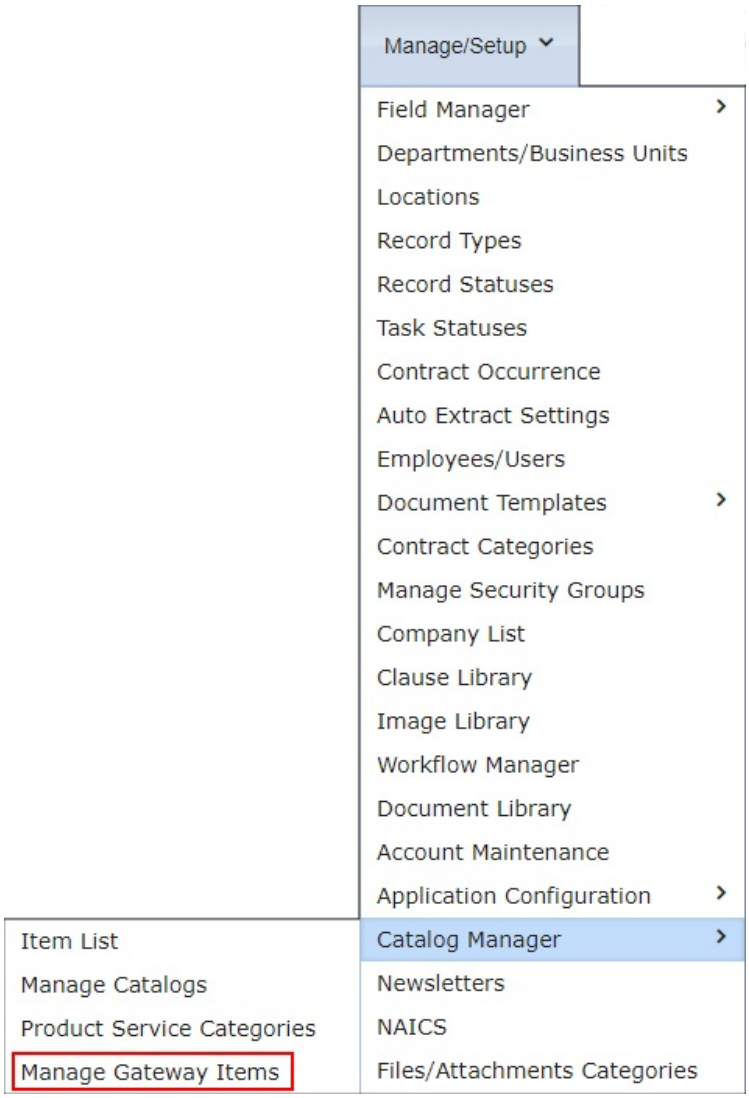
Admin can set this using add/edit employee screen.



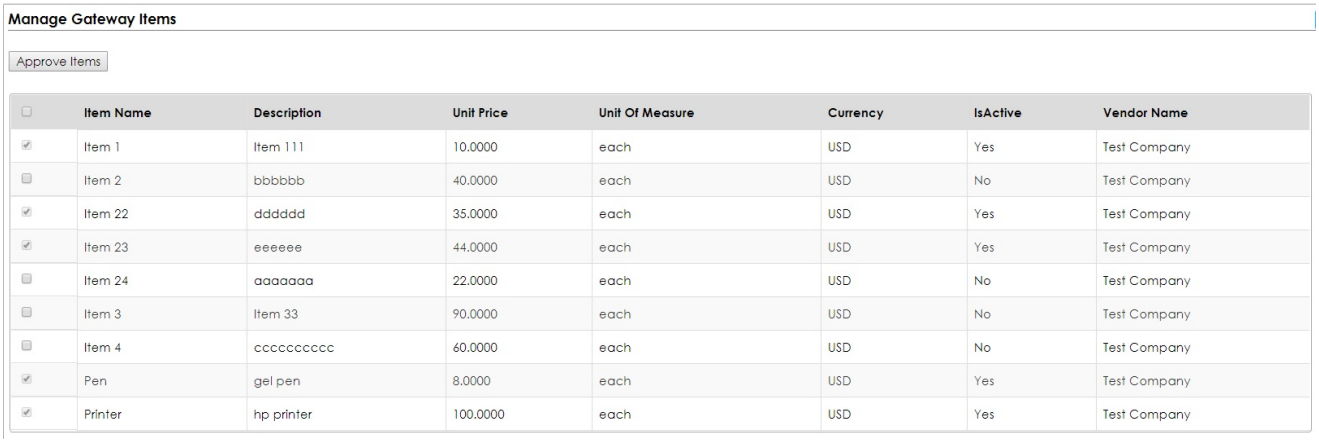
Item Approval for New Items:

The admin user will have following menu to approve new items.

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Once user clicks on Manage Gateway Items, following screen will be displayed.



Manage Gateway Items

Approve Items

	Item Name	Description	Unit Price	Unit Of Measure	Currency	IsActive	Vendor Name
☑	Item 1	Item 111	10.0000	each	USD	Yes	Test Company
☐	Item 2	bbbbbb	40.0000	each	USD	No	Test Company
☑	Item 22	dddddd	35.0000	each	USD	Yes	Test Company
☑	Item 23	eeeeee	44.0000	each	USD	Yes	Test Company
☐	Item 24	aaaaaaa	22.0000	each	USD	No	Test Company
☐	Item 3	Item 33	90.0000	each	USD	No	Test Company
☐	Item 4	ccccccccc	60.0000	each	USD	No	Test Company
☑	Pen	gel pen	8.0000	each	USD	Yes	Test Company
☑	Printer	hp printer	100.0000	each	USD	Yes	Test Company

User can select items which he wants to approve, and then click on Approve Items button.

Selected items will be available, and notification will be send to user who uploaded those items.

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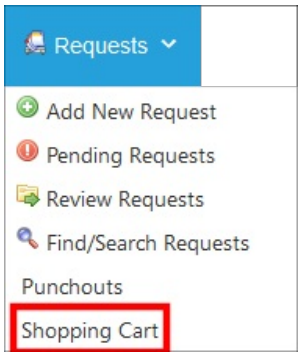


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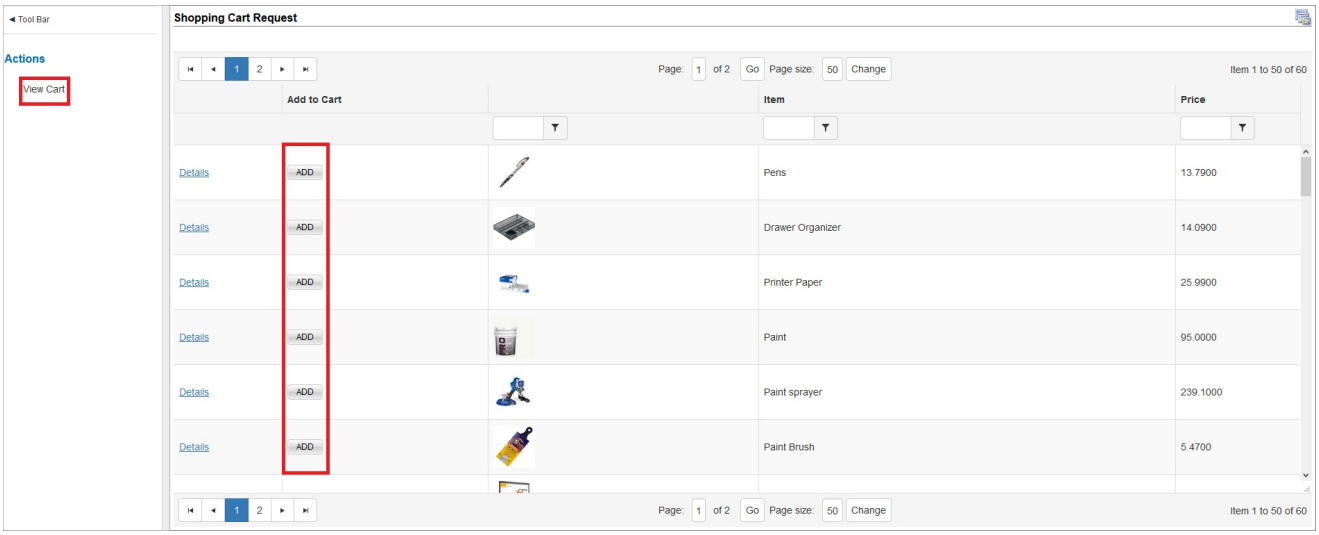
Shopping Cart - Requests

Requests - Shopping Cart:

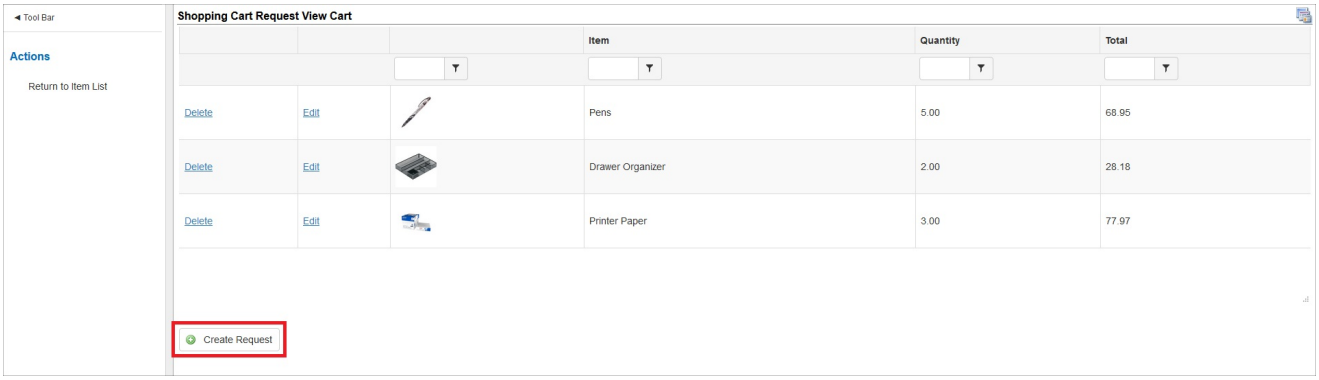
Navigate to **Shopping Cart** under the **Requests** tab.



This will bring you to the shopping cart page.



Clicking on the **Add** button next to the items that were created in the catalog will add it to your cart to create a request. Once you have added all the items you desire to add, click on **View Cart** to review the items you added.



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After reviewing the items, if you are satisfied, click the **Create Request** button to bring you to the request form with sections filled out with information from the cart.

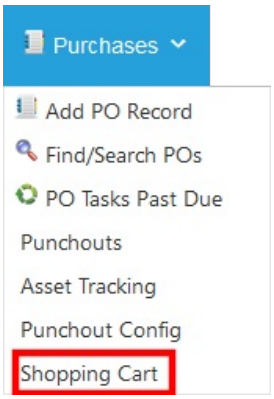
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Shopping Cart - Purchase Orders

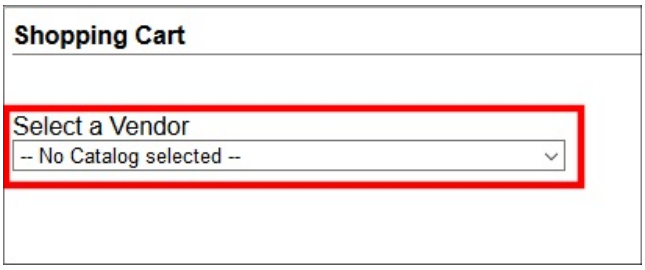
Shopping Cart - Purchase Orders

Purchase Orders

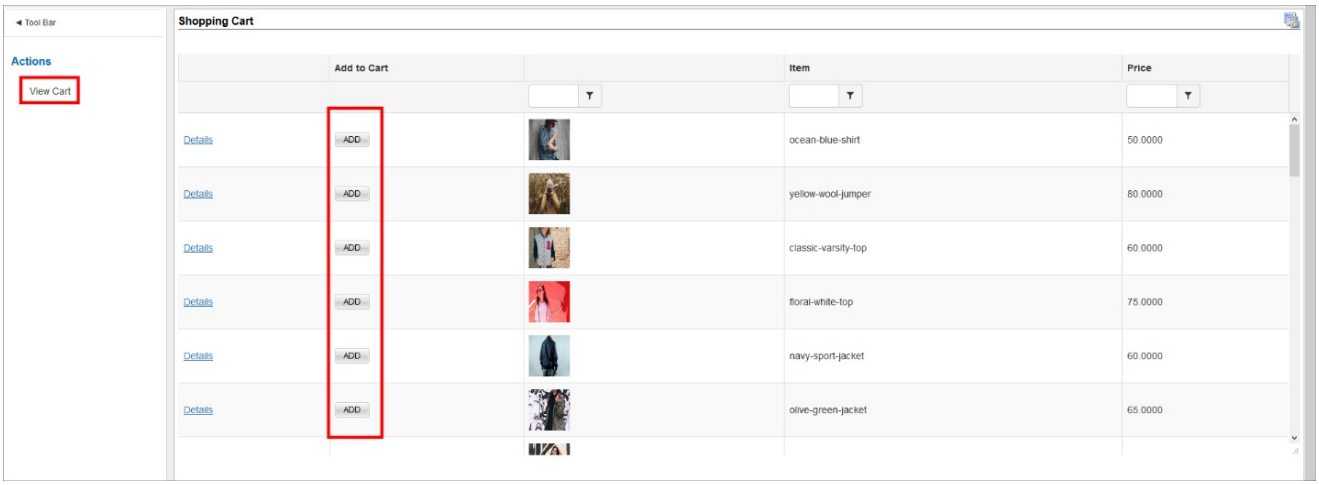
Navigate to **Purchases** > **Shopping Cart**



You will be greeted by a drop-down menu to be able to select a vendor

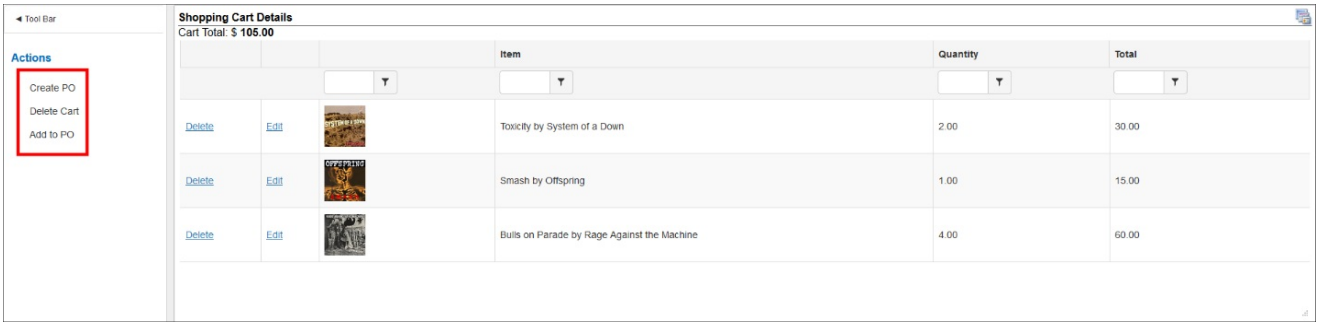


Once you have selected a vendor you will be presented with items from that vendor that can be added to your shopping cart. Once you have finished adding items from that vendor you click **View Cart** in your side menu



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Upon viewing you shopping cart you can Edit or Delete items in your shopping cart, Create a Purchase Order, Delete your Cart, or Add to an Existing Purchase Order from the side menu



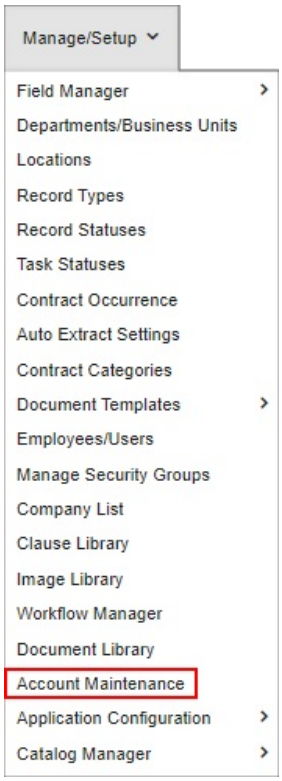
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Import Template for Items

Import Template for Items

Purchases – Import Template for Items

Navigate to **Manage/Setup** > **Account Maintenance**



In the side menu you will need to click on **Data Import Manager**



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Once in the **Data Import Manger** you will need to create a template for **Catalog Items** and go through the standard Import process to upload items to the Contract Insight Item Catalog.

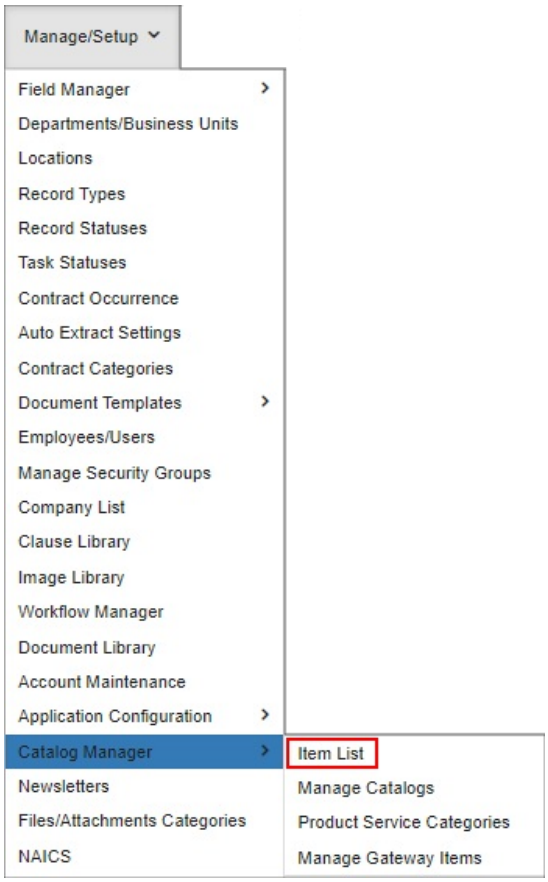
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Linked Images for Items

Linked Images for Items

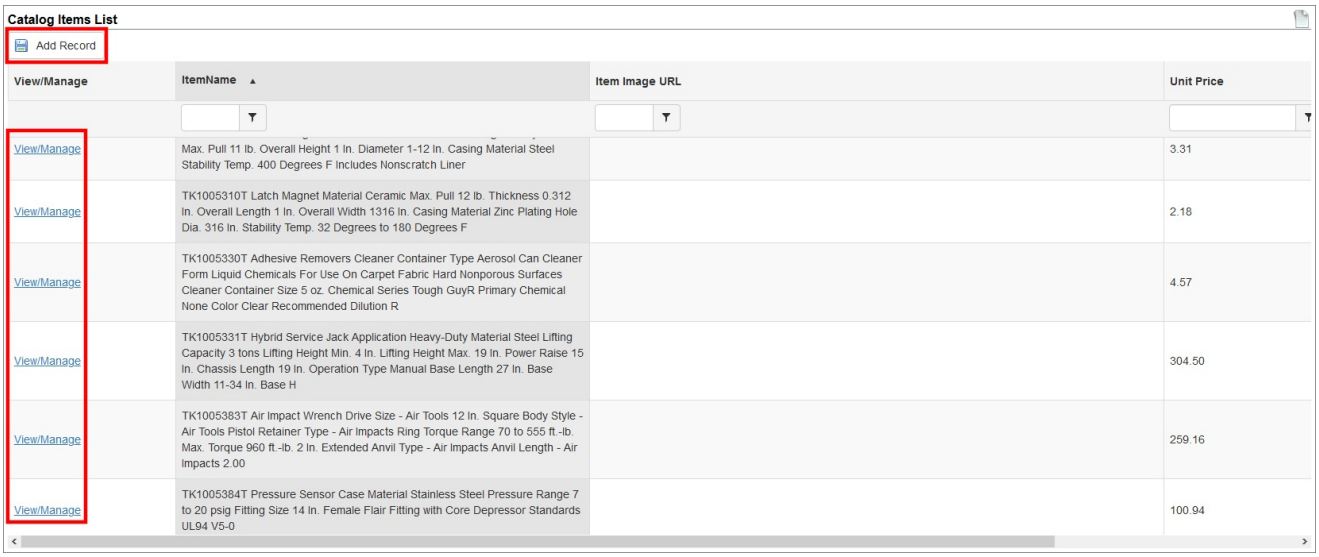
Purchases – Linked Items for Images

Navigate to **Manage/Setup** > **Item List**

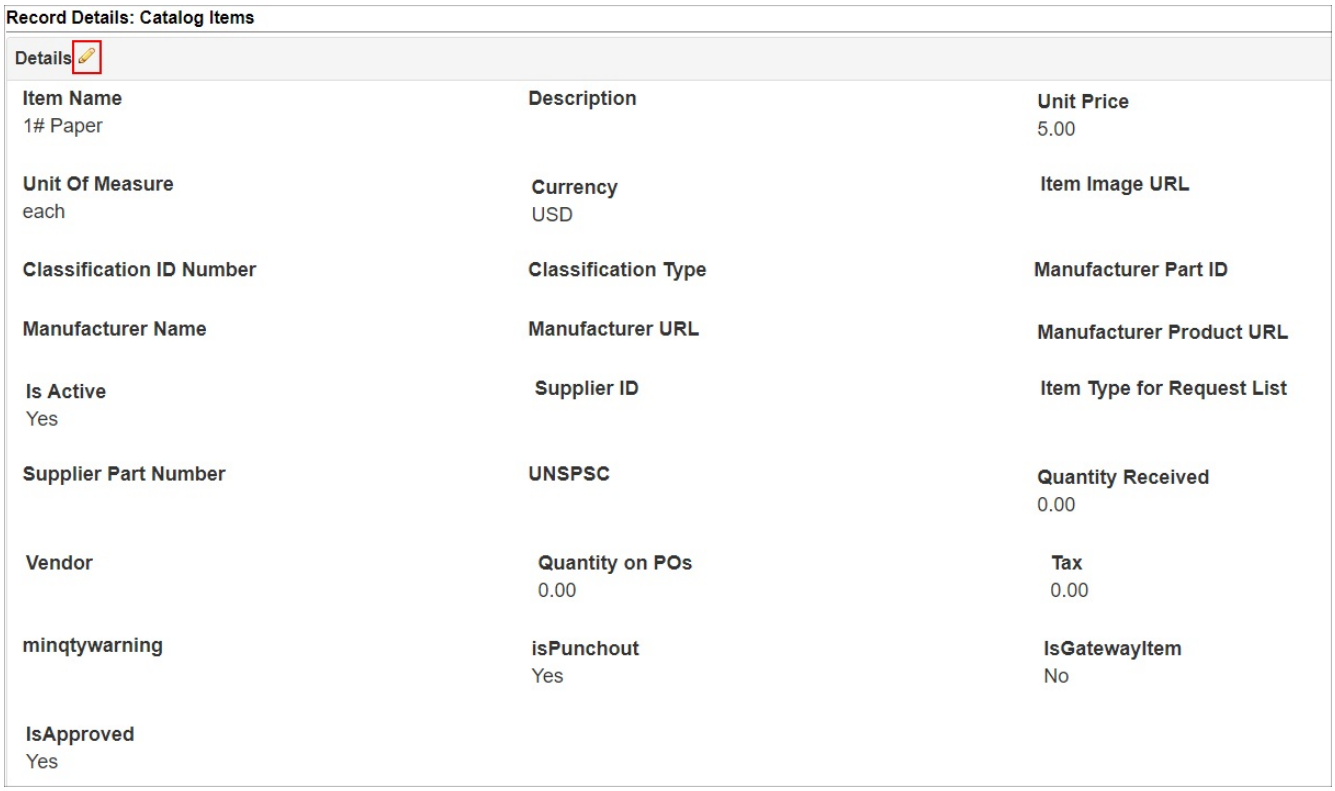


In your **Catalog Items List** you can add items via the **Add Record** button or if you have items in the list you can click **View/Manage** on the item you wish to add the image to

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Once viewing the item details, you can click the pencil next to **Details** or **Item Image URL** to be able to add the URL of the image you wish to add



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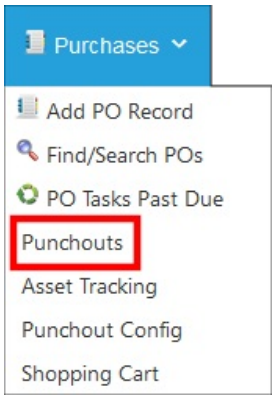
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Punchout Catalog Integration

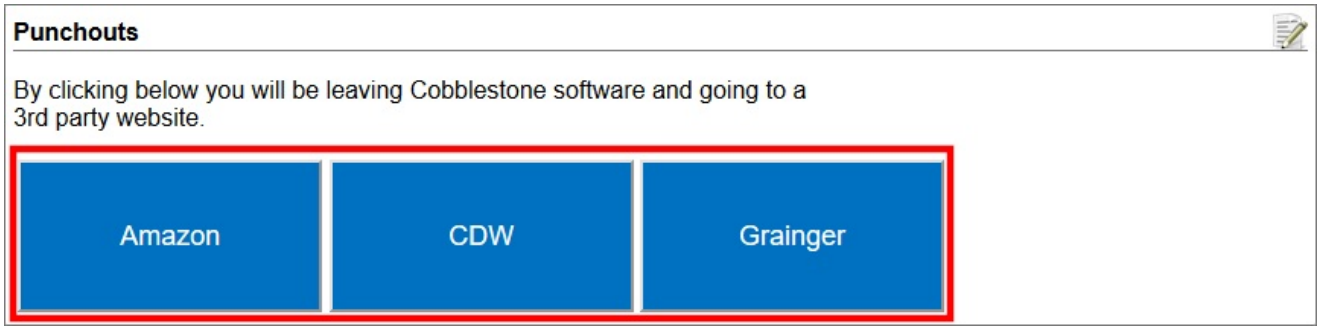
Punchout Catalog Integration

Punchout Catalog Integration

Navigate to **Purchases** > **Punchouts**



This will bring you to the punchouts page where you can select the vendor you wish to make your purchase through.



Proceeding selection of your vendor, you will be brought to their webpage to make your purchases. After finishing you will finish shopping in your shopping cart to be brought back to Contract Insight and create a Purchase order with relevant info from the website/your purchases already filled out.

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Single Sign On Configuration

Single Sign On Configuration

Single Sign On: SAML Identity Providers Documentation

CobbleStone supports the SAML protocol for Single Sign On (SSO) authentication. Each Identity Provider has their own setup/configuration tutorials and instructions to configure them to use SAML authentication.

Below are links to the documentation from popular/common Identity Providers:

Microsoft Azure AD:

https://docs.microsoft.com/en-us/azure/active-directory-domain-services/tutorial-create-instance

Okta:

https://developer.okta.com/docs/concepts/saml/

One Login:

https://www.onelogin.com/learn/saml

Single Sign On: Configuration

By way of an optional add-on Single Sign On module, Contract Insight can be configured to permit login via an existing identity authentication provider. Some areas of the system use the SSO login/redirect method to guarantee a user is logged in before being accessing a resource from outside the system (e.g., a task from a Contract Insight alert email).

SSO configuration is best done with the assistance of a CobbleStone Implementation professional.

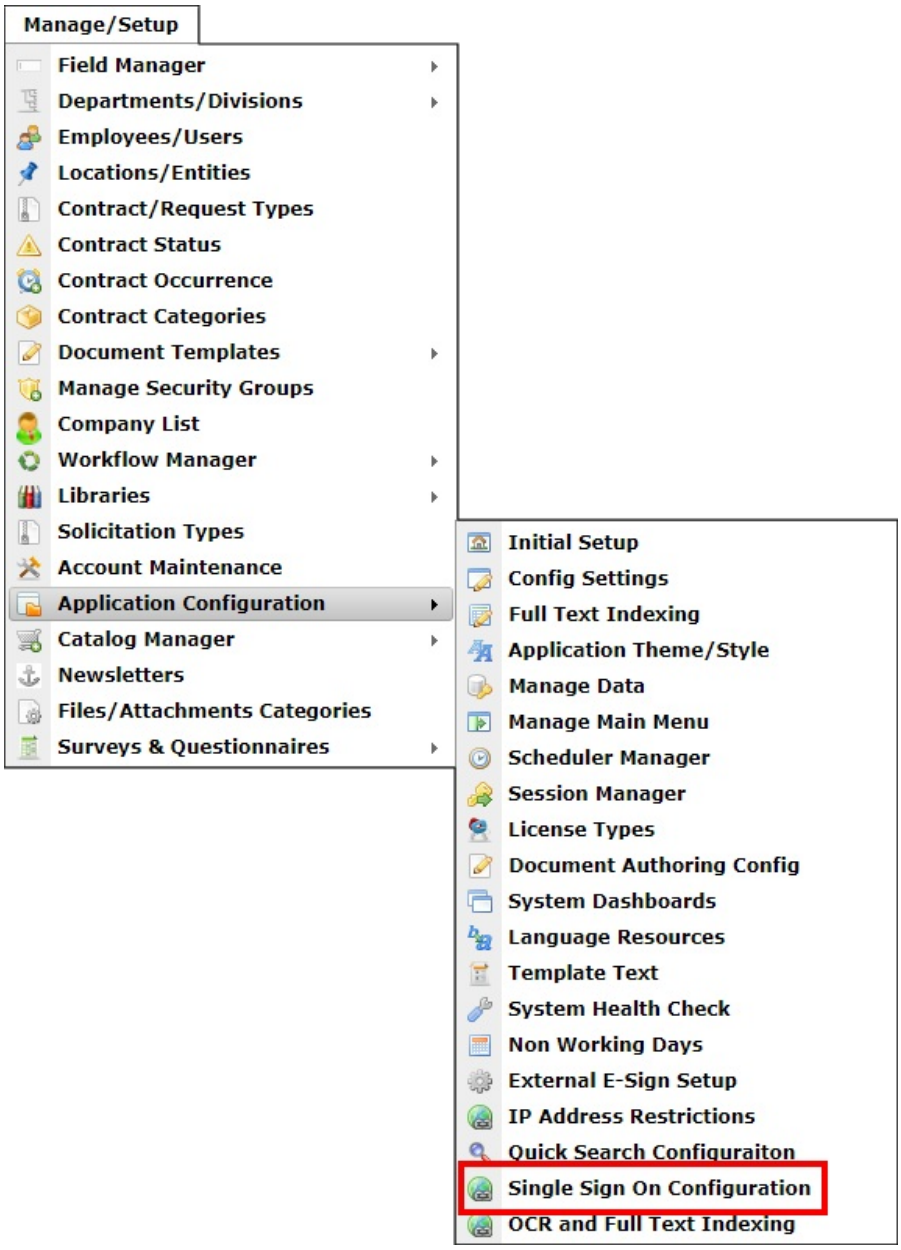
Note: Only a system administrator can access this area.

Setting Up Metadata and Certification

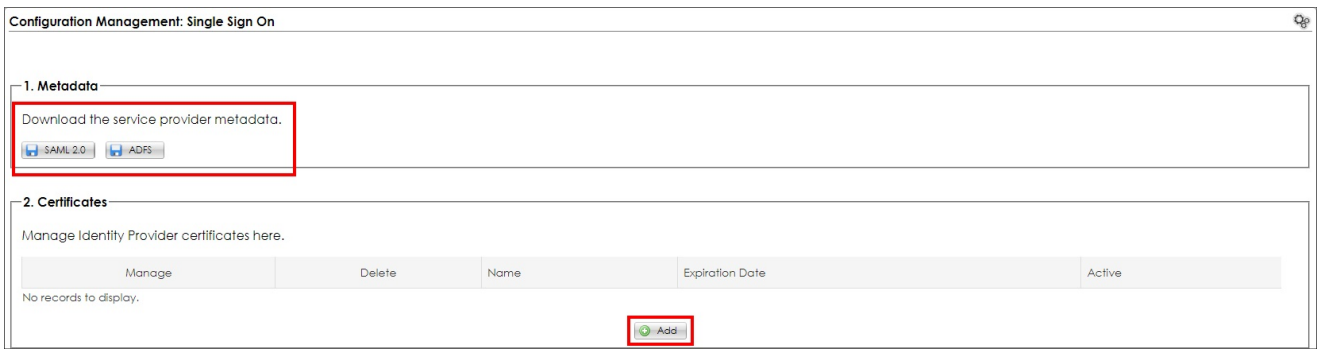
The first steps in configuration require data from Contract Insight be provided to the identity provider and data from the provider back to Contract Insight.

1. **Navigate to Manage/Setup – Application Configuration – Single Sign-On Configuration**.

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2. From the **Metadata** area, download the appropriate **Service Provider Meta Data -** some of which require data from the external identity provider.



3. Enter the downloaded data into the Service Provider.

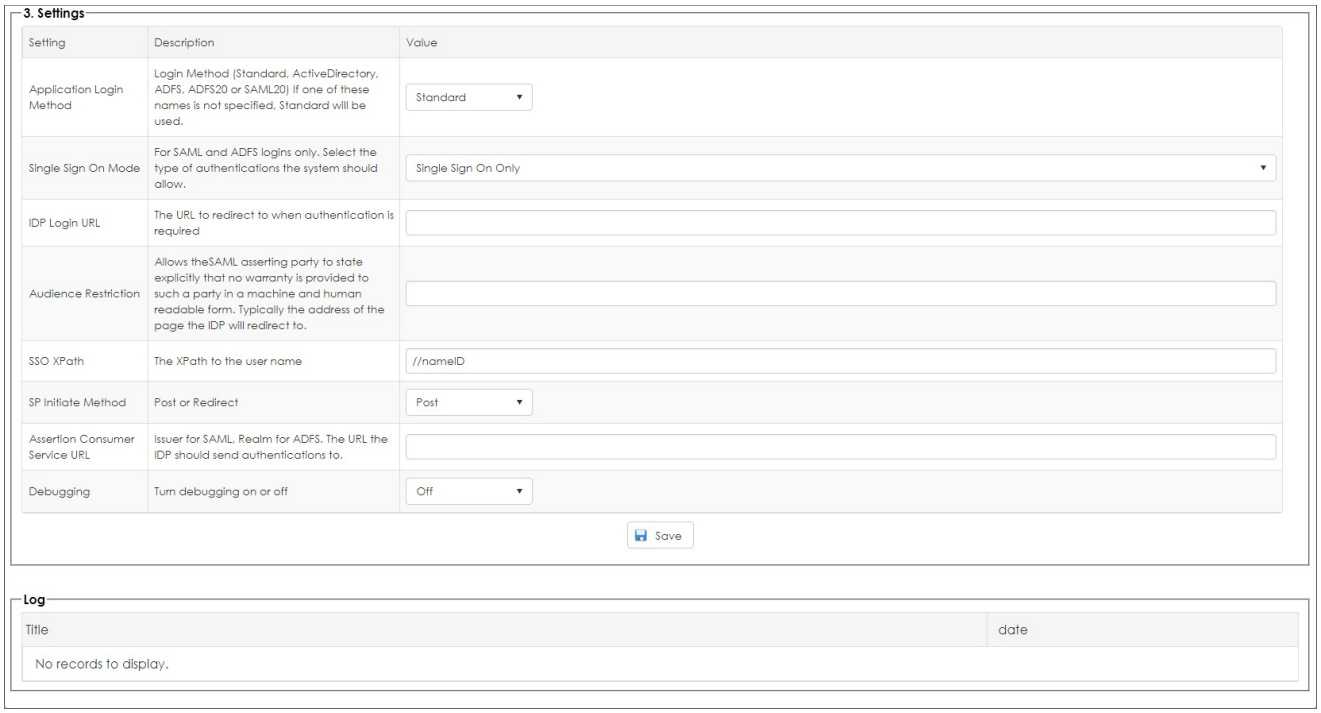
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4. From the service provider, download the **Identity Provider Certificate**.

5. Click **Add** in the **Certificates** area of Contract Insight and upload the identity provider certificate.

SSO Settings

The remainder of the configuration revolves around specific settings in Contract Insight.

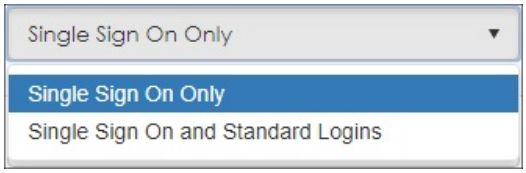


1. Select the applicable Application Login Method: Standard, Active Directory, ADFS, ADFS 2.0, or SAML 2.0.

Note: If the specific method is not listed, the setting remains as Standard.



2. For SAML and ADFS logins, select the authentication type of the Single Sign-On Mode. Select either Single Sign-On Only to permit login only through the external identity provider or Single Sign-On and Standard Logins to permit log into Contract via either the external identity provider or the Contract Insight login screen.



Notes:

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Ensure Single Sign-On and Standard Logins is selected until testing is complete. If desired, switch it to Single Sign-On Only after testing.

To allow both Single Sign-On and Standard Logins, the default page must be exempted from the Single Sign On module.

In systems that are configured to allow both login methods an **Authenticate with SSO** option is added to the standard login form.

3. Enter the **IDP Login URL** for redirection when authentication through the external identity provider is required.

4. Enter the **Audience Restriction** URL, typically the address of the page to which the IDP redirects. Audience restriction allows the SAML asserting party to state explicitly that no warrantee is provided to such a party in a machine and human readable form.

5. Enter the **SSO XPath** to the user name in //nameID format.

6. Select if the SP Initiate Method is Post or Redirect.



7. Enter the **Assertion Consumer Service URL** to which the IDP should send authentication. This setting is the issuer for SAML or realm for ADFS.

8. Select to turn Debugging On or Off. All logins completed via the SSO are entered into the Log are of the **Configuration Management: Single Sign On** screen.



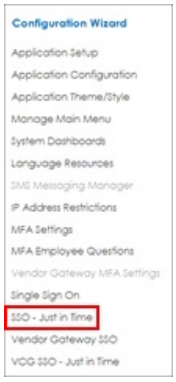
Note: Keep this on while working on the configuration but switch it off once testing is complete. Leaving debugging enabled can cause a decrease in performance, so it is important to leave this setting disabled during routine use.

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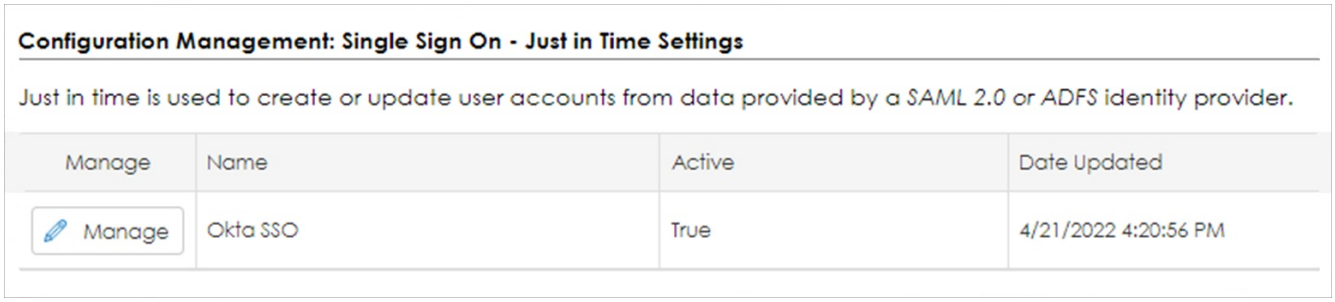
SSO - Just in Time

Setting up Just in Time (JIT) with Single Sign-On (SSO)

To navigate to the JIT setup page, click Manage/Setup, Application Configuration, then select any of the options. Under the side menu, the "SSO - Just in Time" option will appear. Click this option.



Once on the setup page, select **Manage** for the active SSO process.



There are two (2) sections for JIT setup: Settings & Definitions.

Settings

a. These options allow the user to define if JIT is enabled, triggered for updates (each time a user logs in), overwrites previously assigned Security Groups, and controls on attribute data.



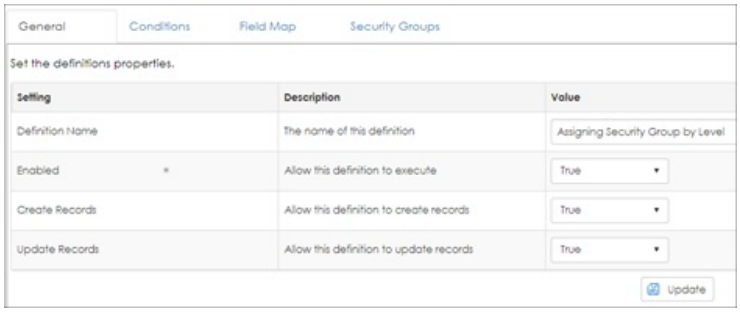
Definitions

a. These allow the user to define what happens when a user logs in for the first time, or each time that user logs in.

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b. A Definition has four areas/parts:

- General



- Conditions



- Field Map
  - This is used to define which field, in CobbleStone, an attribute value goes, or a default value placed in a field in CobbleStone.



- Security Group
  - This allows for an attribute value to help define which Security Group a user should be assigned to using Rules.



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0. Solicitations Overview

Solicitations Overview

Solicitations: Overview

The Solicitation Management Module is an **add-on module** that provides an organization with a collaborative approach to post public and searchable opportunities online as well as receive competitive vendor/respondent feedback (and bid offers) for RFP's, RFi's, and other procurement related opportunities.

The Solicitation Management Module can enable your organization to invite vendors and clients into an online Internet site to share solicitation (bid) opportunities and contract information in an online format.

Find/Search Solicitations

Adding a Solicitation

Copy a Solicitation Record

Link a Contract to a Solicitation Record

Create a Contract from a Solicitation Record

Managing & Editing a Solicitation Record

Solicitation Tasks & Alerts

Solicitations Workflow

Solicitation Attachments

Solicitation Notes & Comments

Assign/Email Respondents to Solicitation Records

Assigning Employees/Alerts for Solicitation Records

Rating & Scoring Solicitation Respondents

Solicitations Questions & Answers

Vendor/Client Gateway Overview

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1. Solicitation Types

Solicitation Types

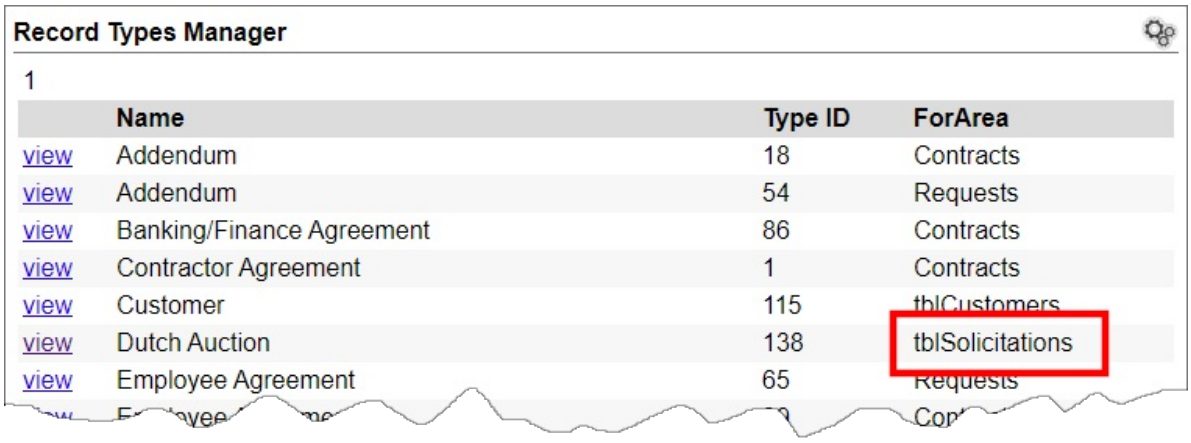
Solicitations: Type Management

Only system administrators can access the Types list.

1. To access the **Types** section of CobbleStone, via the top navigation menu, navigate to **Manage/Setup** - **Record Types** (or **Contract Types**).

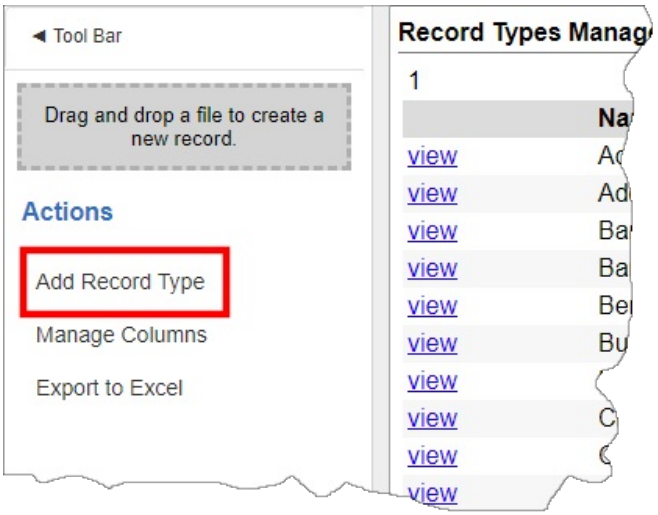


2. The Record Types Manager displays. All existing solicitation types are marked with tblSolicitations.

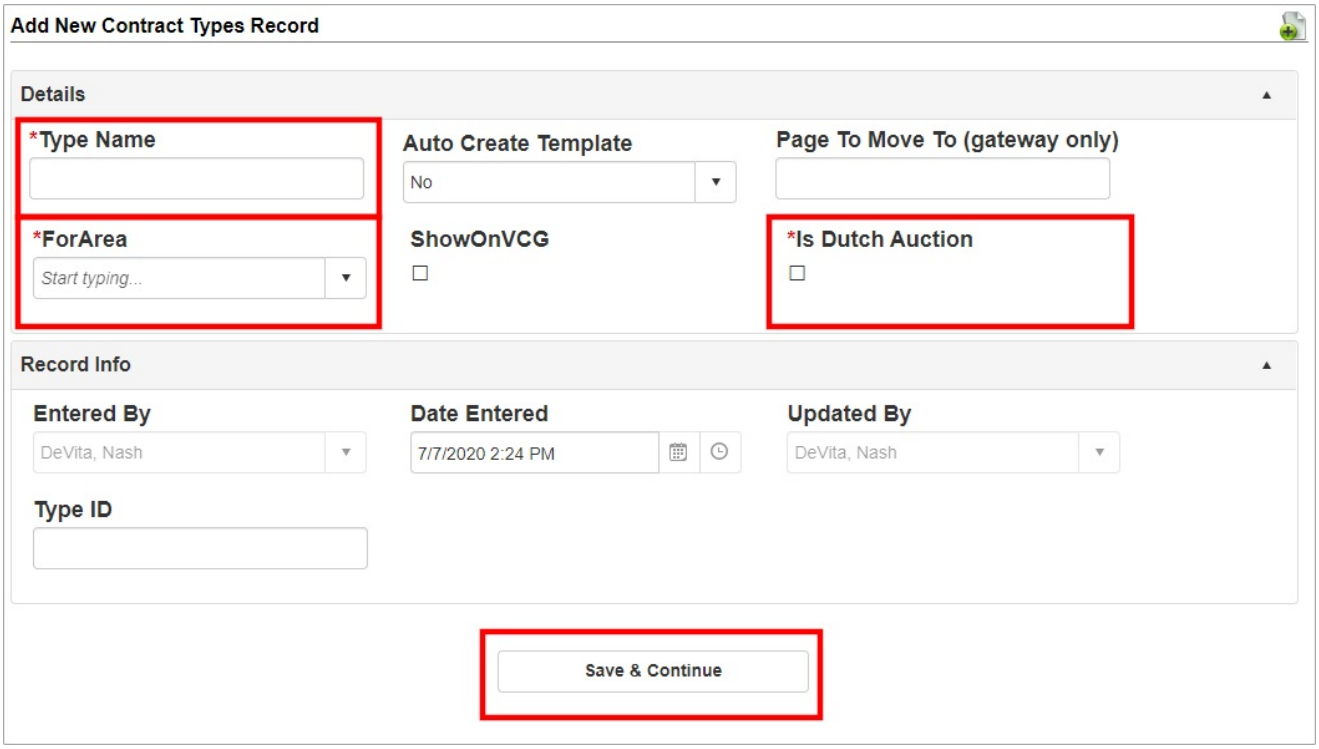


If adding a new type, on the side menu, click Add Record Type.

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3. The Add New Type Record screen displays. Complete all of the required fields.



In **ForArea**, be sure to select the Solicitation Details option.

Is Dutch Auction is of special importance as it is only applicable to solicitation types. If the eSourcing records of the type are to be processed as dutch auctions, mark this tick-box. While it is a required field, leaving it unmarked is acceptable when the type is NOT processed as a dutch auction.

4. Click **Save & Continue**. The Record Types Manager displays again.

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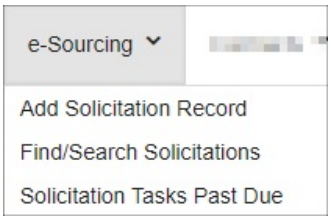
2. Find/Search Solicitations

Find/Search Solicitations

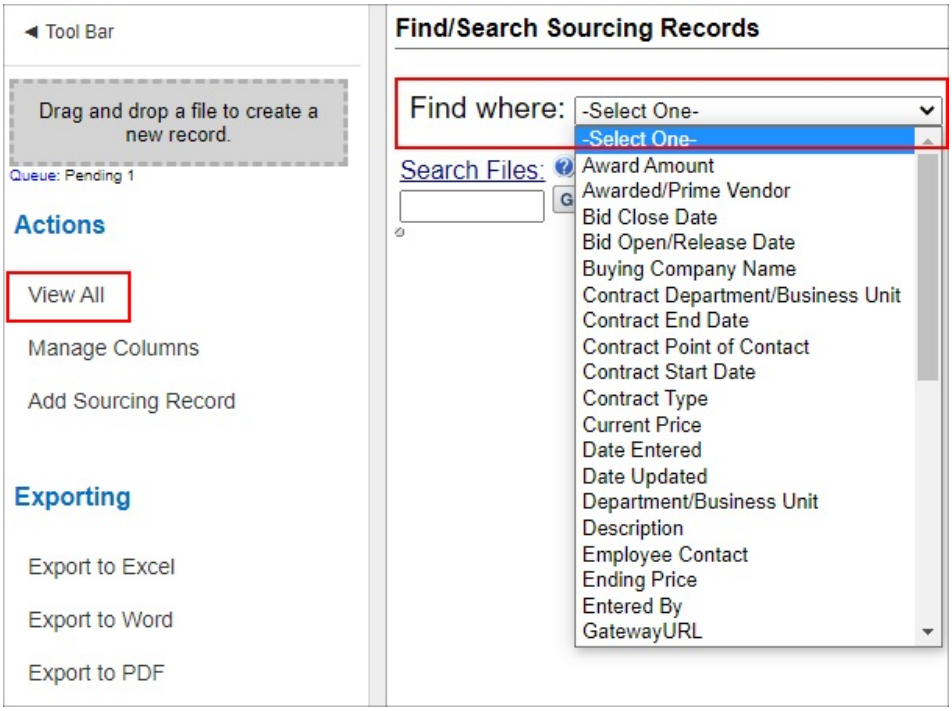
Solicitations: Find/Search

Only authorized/licensed users can access the **Solicitations** portion of CobbleStone.

1. To access the **Solicitations** section of CobbleStone, click **e-Sourcing** top navigation menu item. Then click **Find/Search Solicitations**.



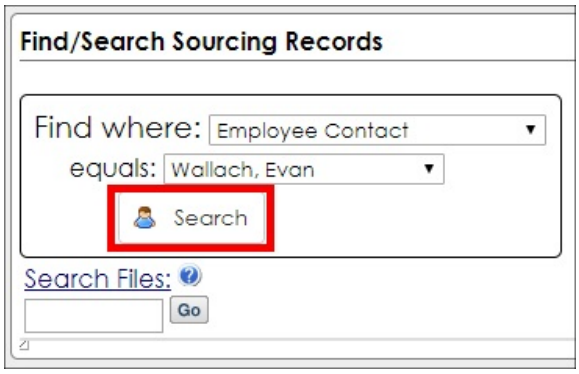
2. To view the details for an existing solicitation record, click **Find/Search Solicitations**. The **Find/Search Solicitations** screen opens.



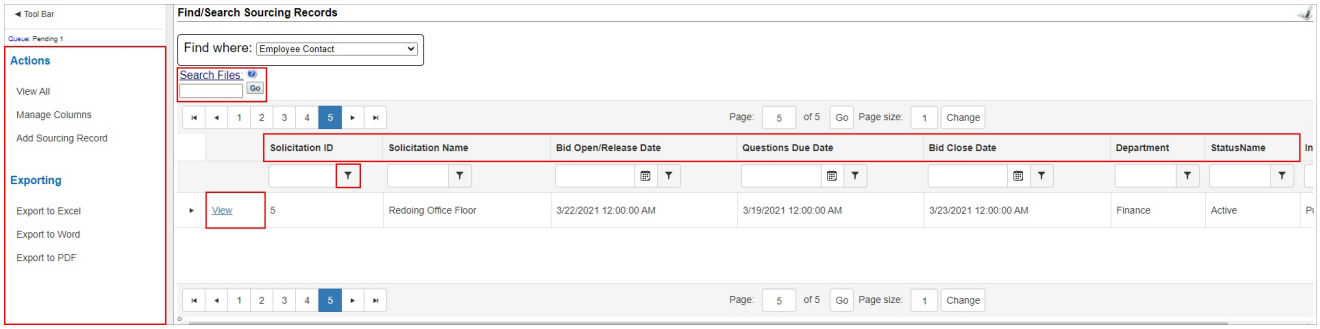
3. Search solicitations by choosing a field of all solicitation records to search by (such as the **solicitation close date**, **award amount**, or **entered by**). To do so, click the drop-down menu to display a list of fields to choose from.

4. Depending on the field selected, search criteria/keywords to search for in the specified field may need to be entered. Click **Search** once the necessary search criteria have been entered.

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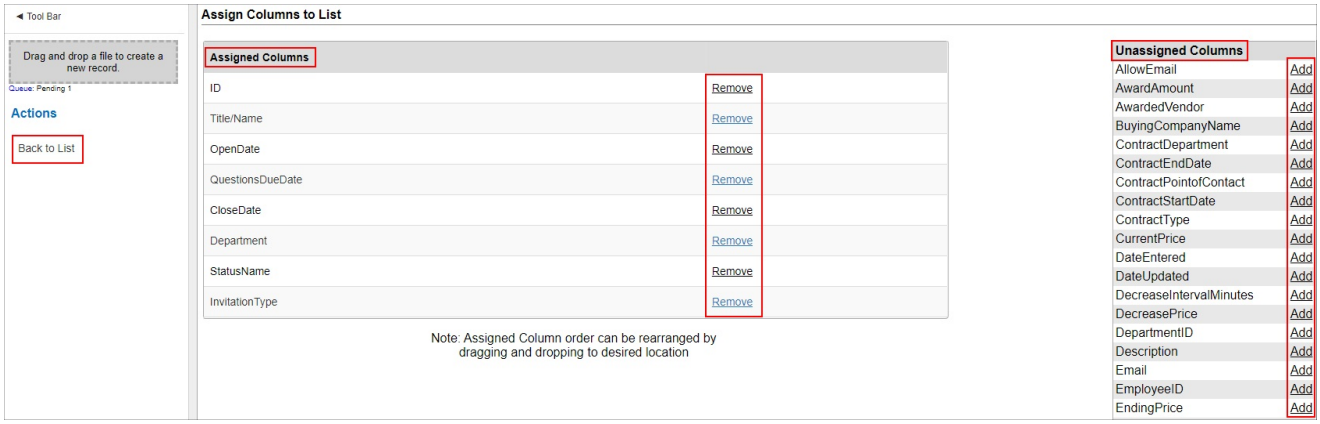
5. After clicking **Search**, a table with solicitation records meeting the search criteria displays.



6. All solicitation records in the system can be viewed by clicking **View All** on the side menu.

7. Other options on the side menu include:

a. **Manage Columns**: By clicking this option, system administrators are able to add and remove columns to be displayed on the "**Find/Search Solicitations** screen.



b. **Export** the **Find/Search Solicitations** screen to Excel, PDF, or Word formatted files

Note: When exporting, all columns displayed on the screen are exported, including the **View** link (which will be disabled, but will still be displayed). It is the user's responsibility to remove any unwanted columns after exporting.

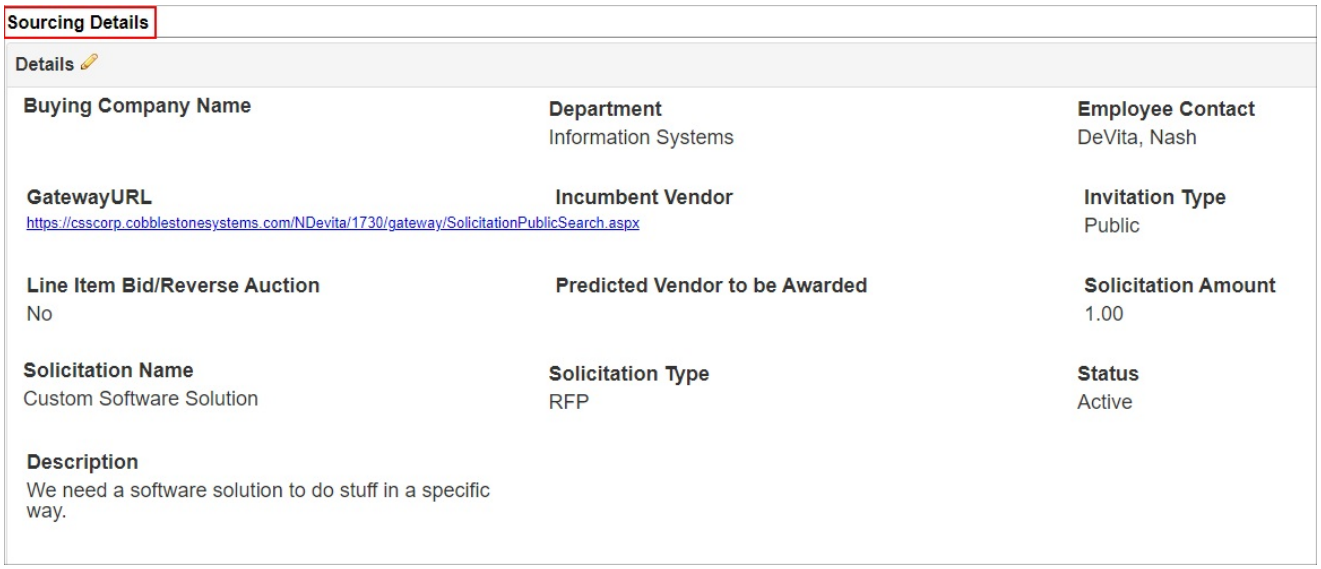
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c. **Search Files**: If full text searching has been enabled, this option will search all text-based files attached to solicitations based on the keyword(s) entered.

8. Note the columns in the results table. Filter the rows being displayed by each of these items by entering a keyword(s) into the corresponding text box and clicking the **filter icon** .

9. To view the details of a solicitation record, click **View** to the left of the solicitation record's name you would like to view.

10. The **Solicitation Details** screen opens.



11. View all of the solicitation record's details and information from the **Solicitation Details** screen

Notes:

The side menu contains options for each section/functionality related to the solicitation record. These buttons' functionality/uses are further described in more detail in their corresponding Wiki pages under the Solicitations section.

Each section is collapsible by using the arrow in the right corner of each section's group box.

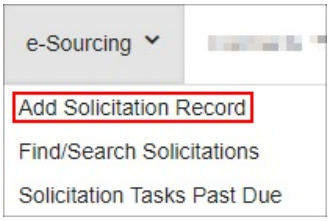
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3. Adding a Solicitation

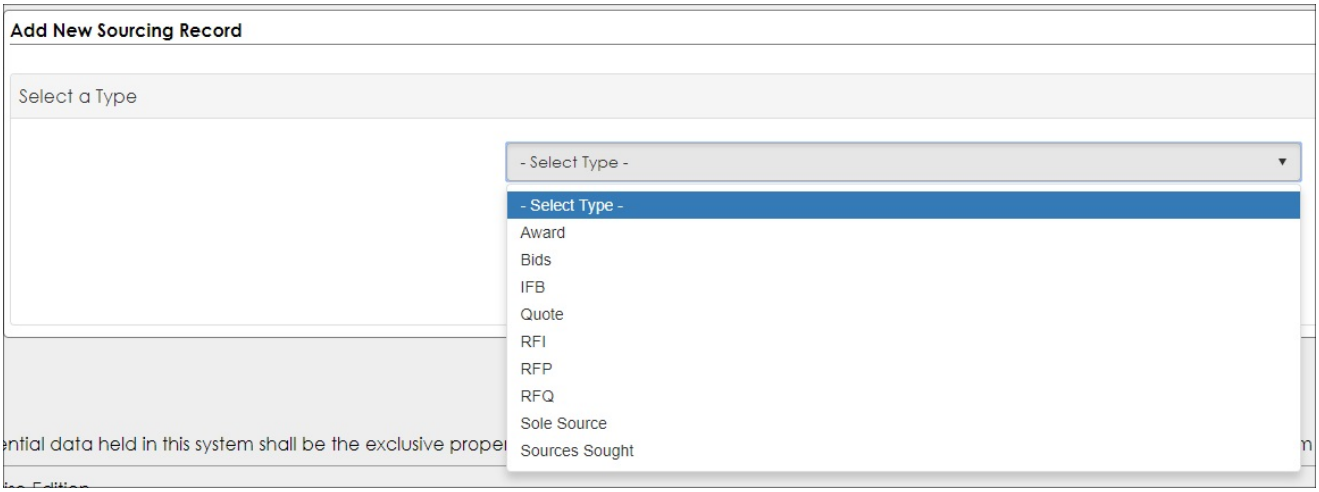
Adding a Solicitation

Solicitations: Add a New Solicitation Record

1. Click **e-Sourcing** on top navigation menu to see a sub-menu. Click on **Add Solicitation**.



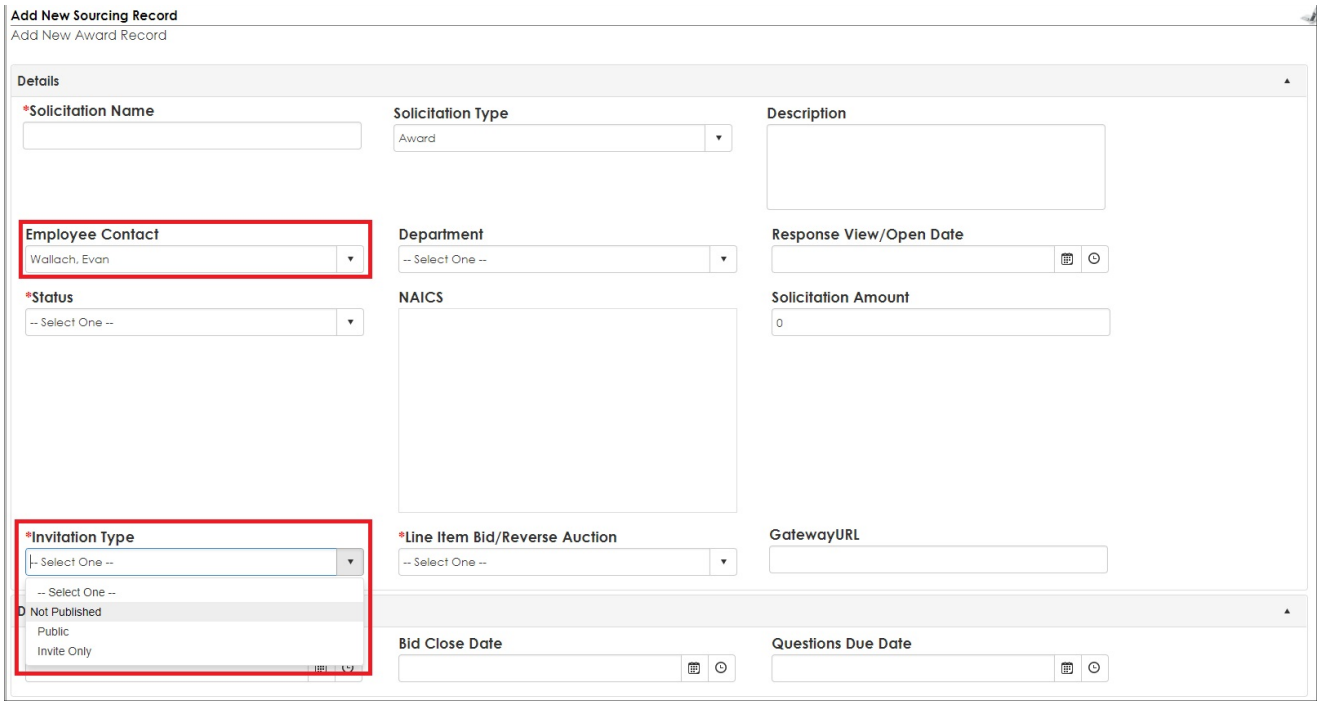
2. After clicking **Add Solicitation Record**, the **Add New Sourcing Record** screen displays. Choose the type of solicitation record to add using the drop-down menu. Click **Continue**.



Note: This list of Solicitation Types can be customized using **Solicitation Types** under the **Manage/Setup** top navigation menu item.

3. The **Add New Solicitation Record** screen displays. Enter in all necessary information pertaining to the solicitation.

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a. All areas marked with a red asterisk are required.

b. The **Employee Contact** selected is the name of the employee that is managing the solicitation record, not necessarily the person creating the request, and will also be the Employee receiving the alerts for the Solicitation Record.

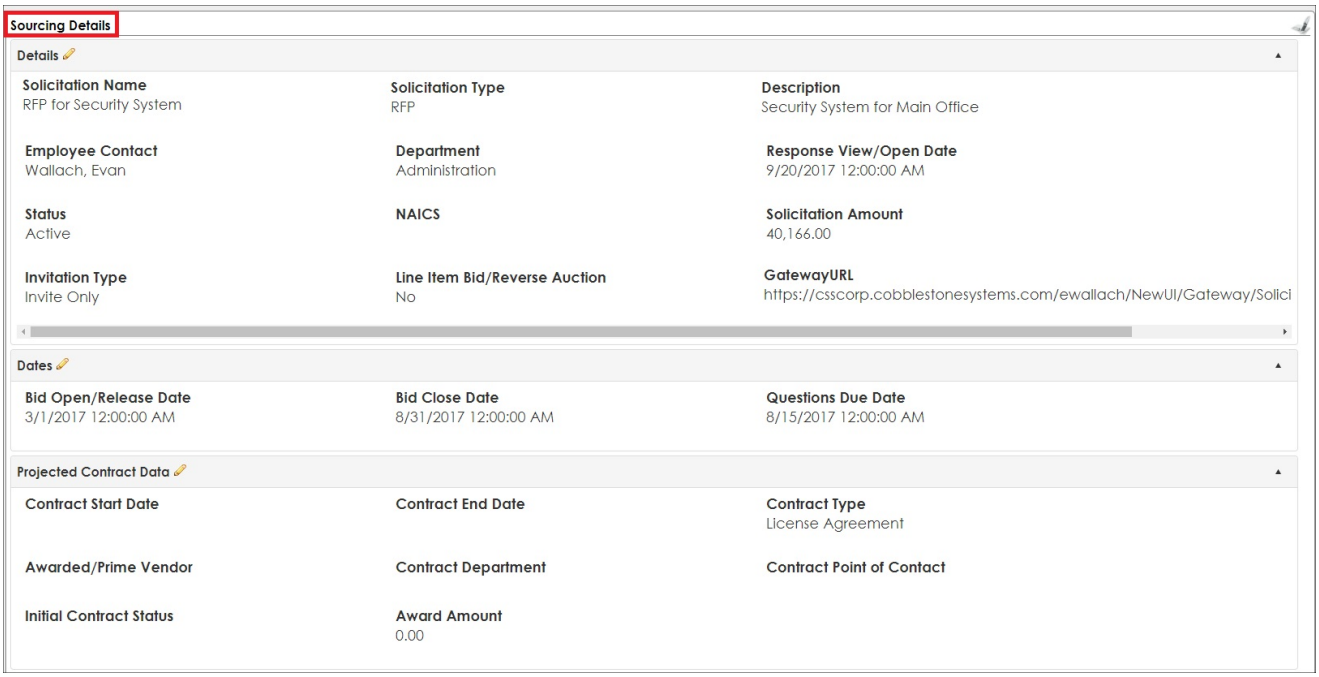
c. The **Invitation Type** field allows the user to specify whether the Solicitation will be viewable on the Public portion of the Vendor/Client Gateway (Public), viewable on the Vendor/Client Gateway for Vendors logged in to the Gateway (Invite Only), or not viewable at all outside of Contract Insight (Not Published).

Note: all fields of the **Add New Solicitation Record** screen are user-definable (add/remove fields that are wanted/unwanted) as well as specify which fields are required. Only authorized/licensed users that have the correct permissions assigned to them will be allowed to access the Create User-Defined/Custom Fields.

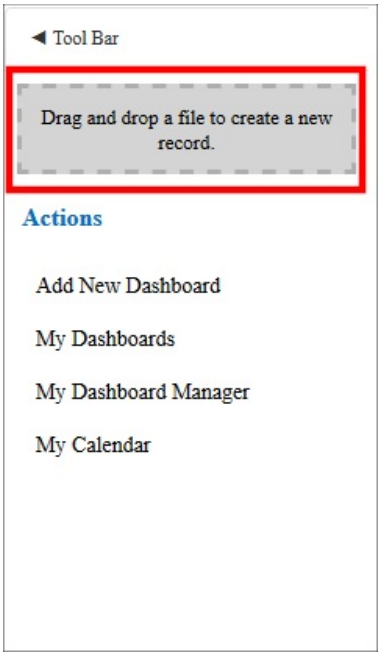
7. Click **Save & Continue** once all required/necessary information has been entered

8. The **Solicitation Details** screen opens for the solicitation record created.

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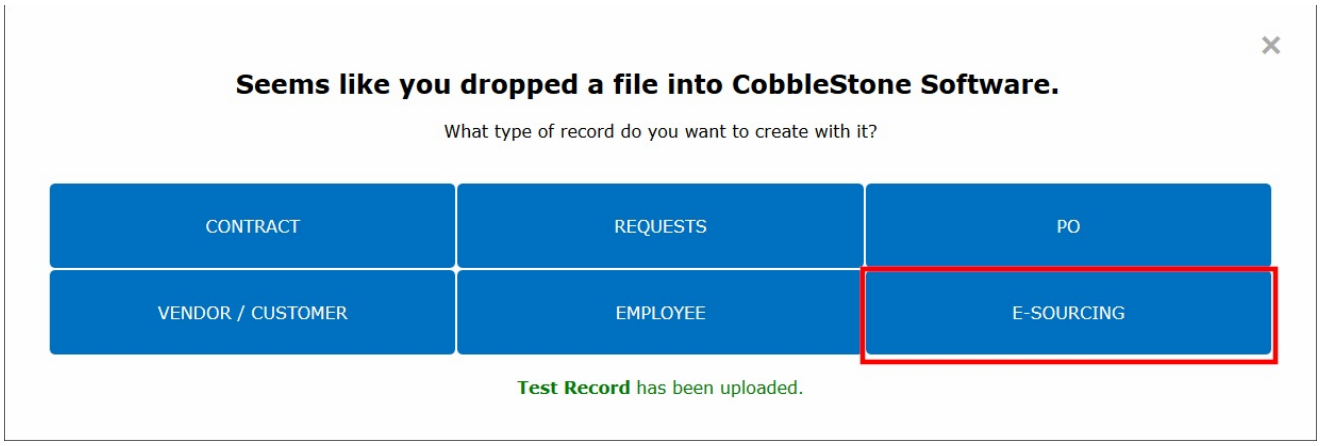


You are also able to add a solicitation record from a file on any page with the grey Drag and Drop box in the side menu.



After dragging and dropping the file onto the page you will be prompted to choose what type of record you wish to create. To create a Solicitation Record you will want to choose **E-Sourcing**.

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Then you will be brought to a page where you are able to review the file and enter all necessary metadata for the record.

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4. Managing & Editing a Solicitation Record

Managing & Editing a Solicitation Record

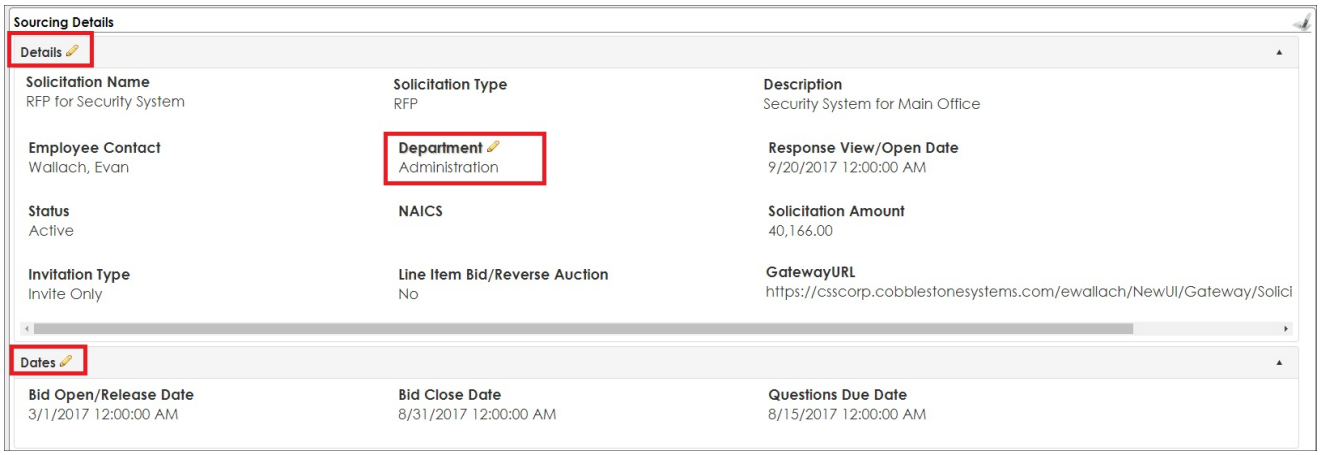
Solicitations: Managing & Editing Records

Editing a Solicitation Record:

1. To edit/manage a solicitation record, go to the **Solicitation Details** screen for it.

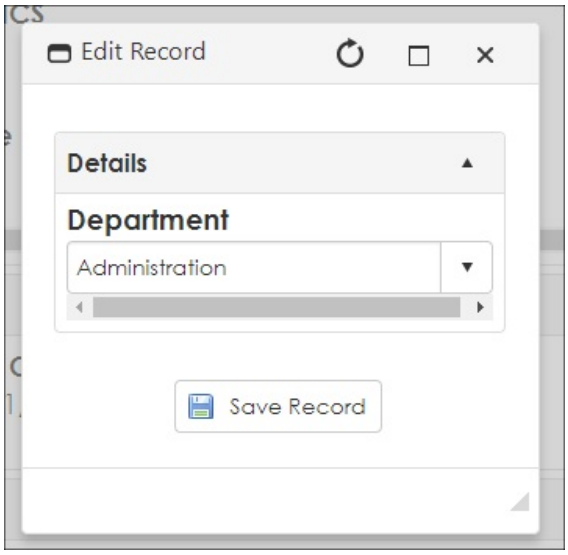
2. Editable fields have a **pencil icon** ( ) to the right when hovered over.

3. Each **pencil icon** opens the **edit screen** for that field. You can also click the **pencil icon** by the Field Group name to edit all the fields in the Field Group. Click the **pencil icon**.



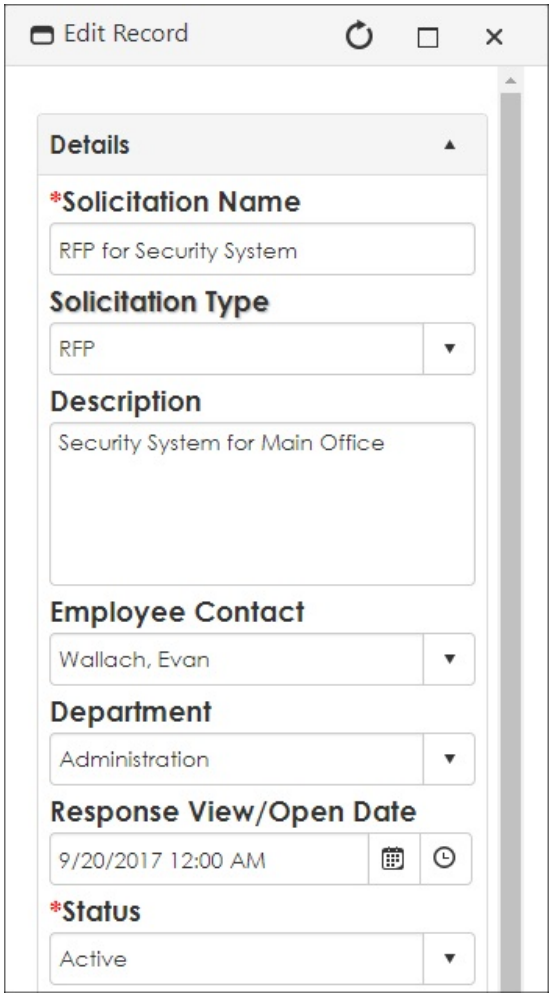
4. An **Edit Field** pop-up displays

Individual Edit



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Group Edit



5. Edit the information to changed and click **Save Changes**. To cancel the edit, click the **X** in the right hand-corner of the pop-up.

6. The **Solicitation Details** screen displays reflecting the changes.

Contacting Respondents in mass Regarding Changes

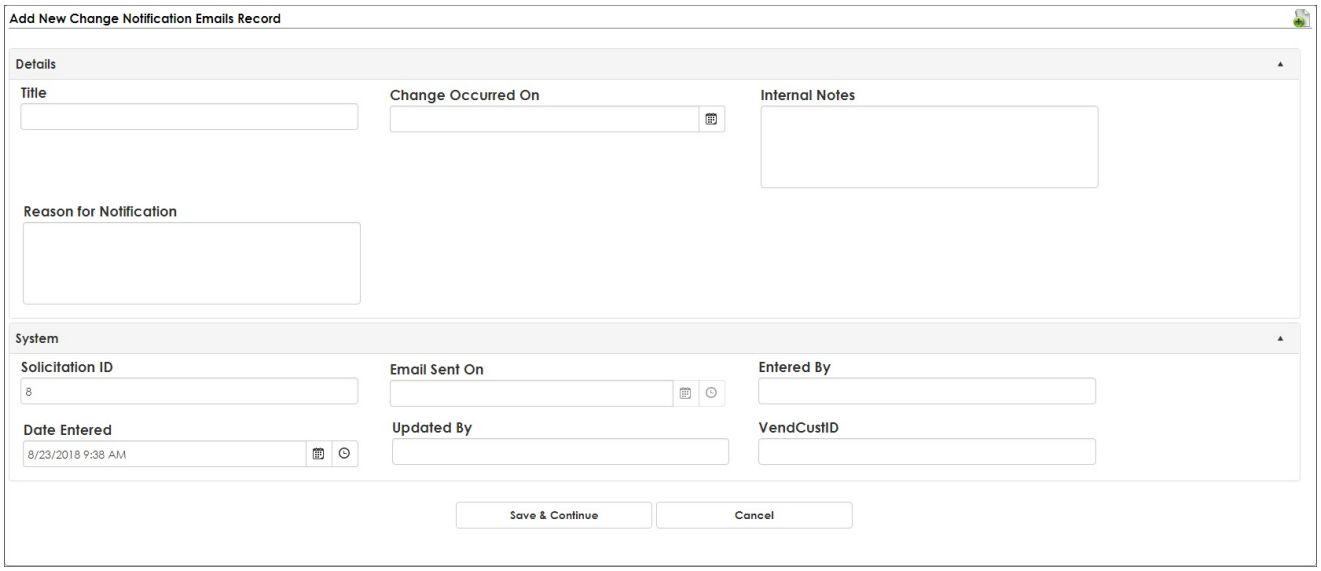
1. On the **Solicitations Details** screen, scroll down to the **Change Notifications Email** area.

2. Click **Add**.



3. Enter all details relevant to the change. Optionally, include **Internal Notes** that are not a part of the email.

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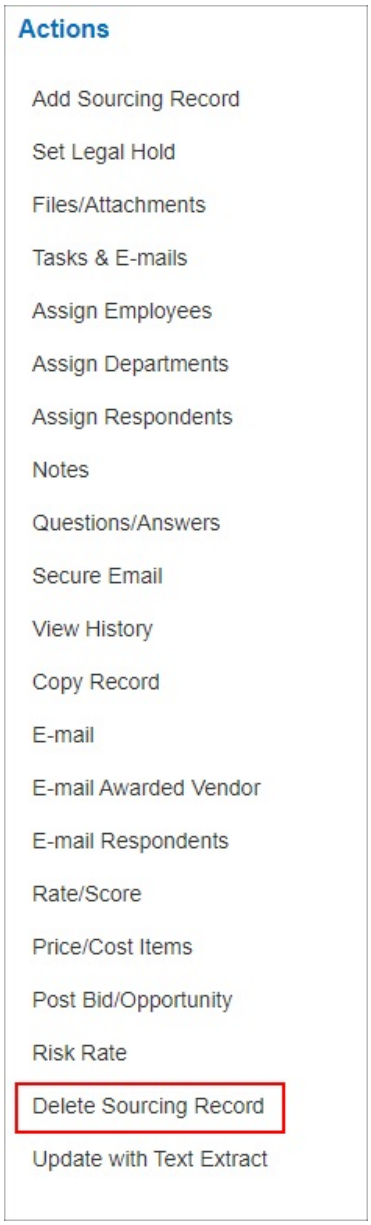
3. Click **Save & Continue** to prepare the email or **Cancel** to abort the notification. The email sends upon the next cycle of the **Solicitation Email** job in the **Scheduler Manager**.

Deleting a Solicitation Record:

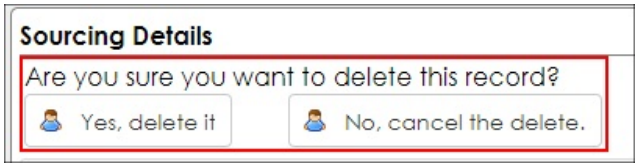
1. To delete a solicitation record, go to the **Solicitation Details** screen.

2. Click the **Delete Sourcing Record** on the side menu.

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3. Confirm the removal of the sourcing record. Click **Yes, delete it** to delete the record or **No, cancel the delete** to cancel deleting the record.



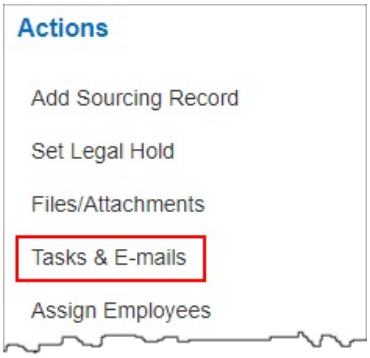
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5. Solicitation Tasks & Alerts

Solicitation Tasks & Alerts

Solicitations: Accessing the Tasks, E-mails & Alerts Section

1. To access the **Tasks & E-mails, Workflow, & Alerts** section of a solicitation record, click **Tasks & E-mails** on the side menu of the **Solicitation Details** screen.

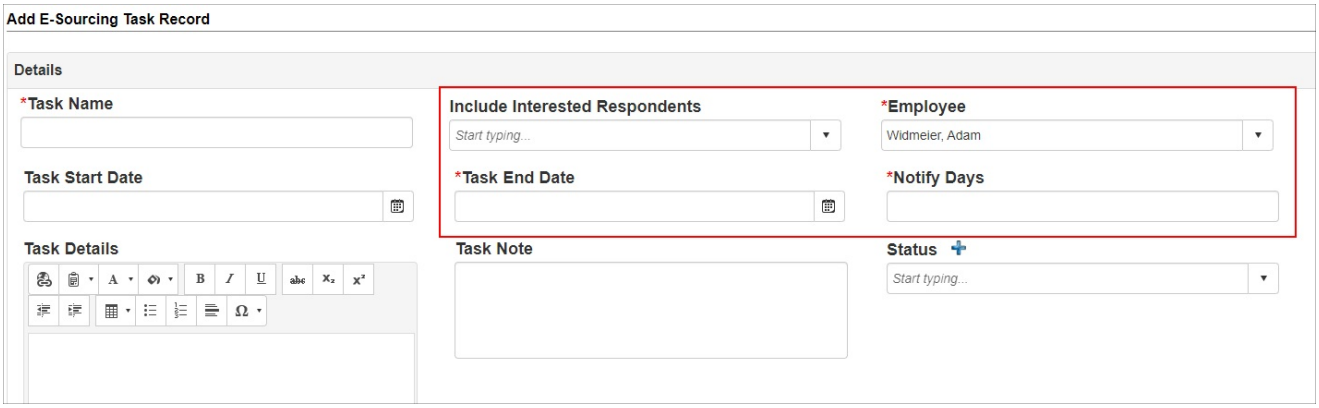


2. A the same section by scrolling down the **Solicitation Details** screen to the **Tasks, E-mails, Workflow, & Alerts** section of the page. Both methods go to the same area.



Adding a Task

1. To add a new task/alert, click **Add Task** in the **Tasks, E-mails, & Alerts** section to open the **Add Task** screen.



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a. All fields on the **Add Task** screen are user-definable by authorized users. To modify the fields, navigate to **Manage/Setup > Manage Fields > Field Manager**.

b. Required fields can be added/removed through the **Field Manager** as well.

c. Be sure to enter all information into the required fields (marked by a red asterisk).

d. The **Employee** drop-down menu is important (also required) because this is who receives the alerts for the task being created.

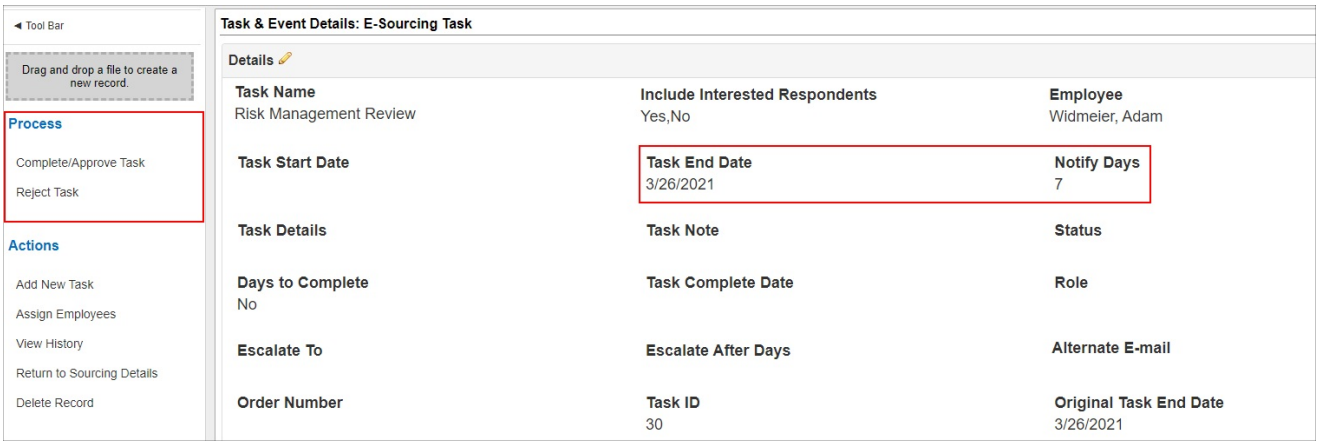
e. The **Task End-Date** is important because this is when the task is due to be completed by and is an alert date as well.

f. To notify the employee to the upcoming end-date, enter the number of days (before the end-date) in the **Notify Days** field. The number of Notify Days entered triggers an alert that number of days before the **Task End Date**.

g. The grayed-out boxes at the bottom of the **Add Task** screen are Read-Only fields that are populated automatically after clicking **Save**.

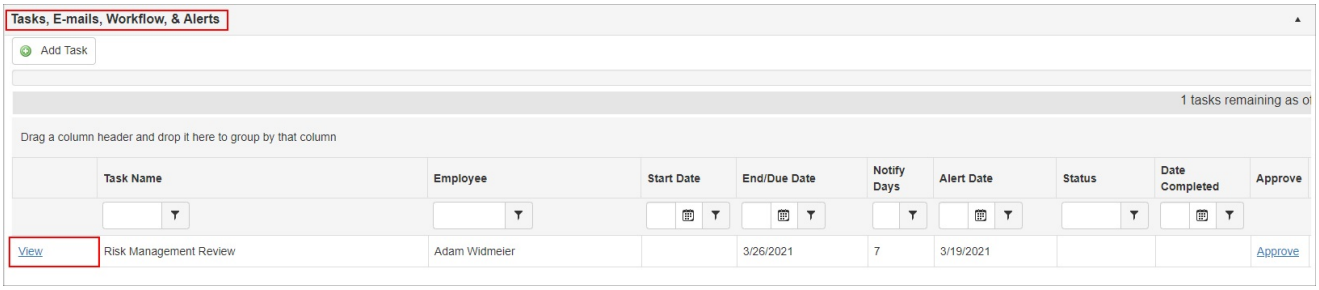
h. Once all necessary/required information is entered, click **Save & Continue** at the bottom of the screen to add the task/alert.

2. Once the new task is saved, the system displays the new **task's details** screen.



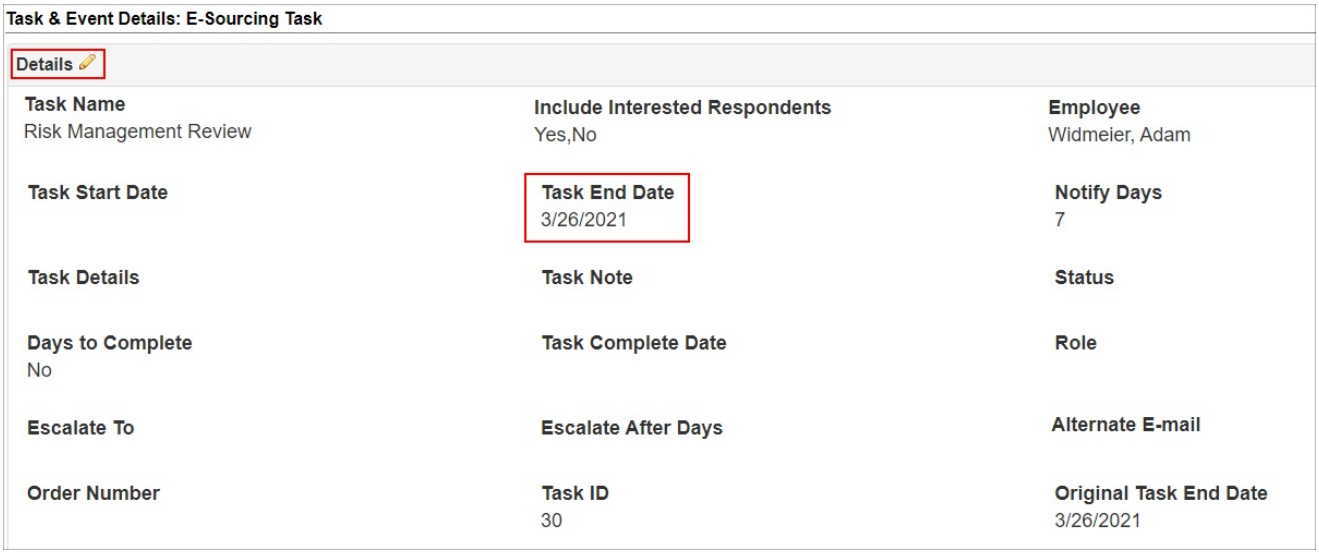
Managing & Editing Tasks

1. To manage and edit a task's details, click **View** for the line item to view on the **Solicitation Details** screen.



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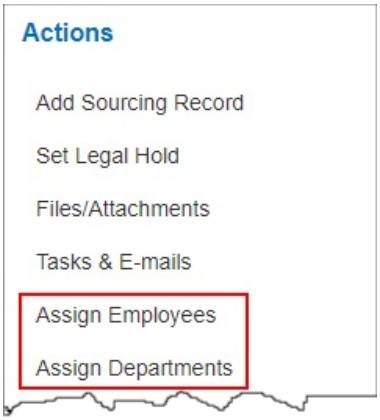
2. The **Task & Event Details** screen displays. From this screen, edit the task by clicking the **pencil icon** ( ) for the corresponding line item. Edit a Field Group's fields simultaneously by clicking the **pencil icon** next to the Field Group name.



1. The **Edit Field** screen displays.
2. Click **Save Changes** to save the changes made.
3. Click the **X** in the upper right corner of the window to cancel the changes and go back to the **Task Details** screen.

Assign additional employees to receive alerts for the task

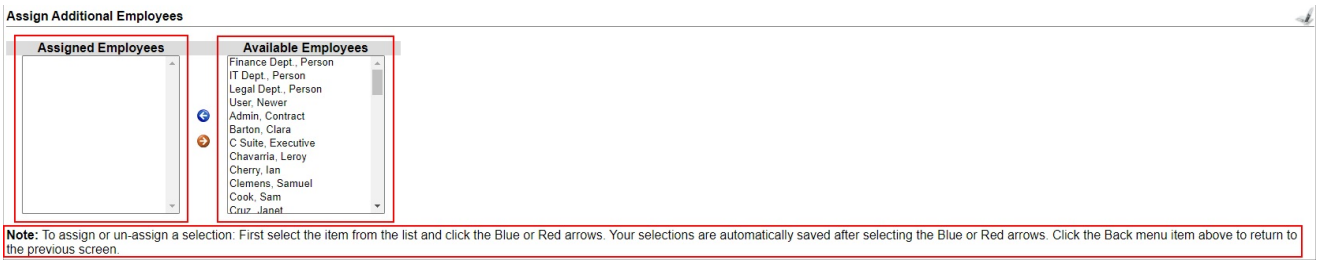
1. To assign additional employees to receive alerts for this task, click **Assign Employees/Departments** and make sure they receive emails in the **Details** section.



2. Select/highlight the employee's name in the **Available Employees** box and click the **Blue Arrow** to add the employee's name to the **Assigned Employees** box.

3. To un-assign an employee from receiving alerts about this task, highlight the employee's name in the **Assigned Employees** box and click the **Red Arrow** to remove the name.

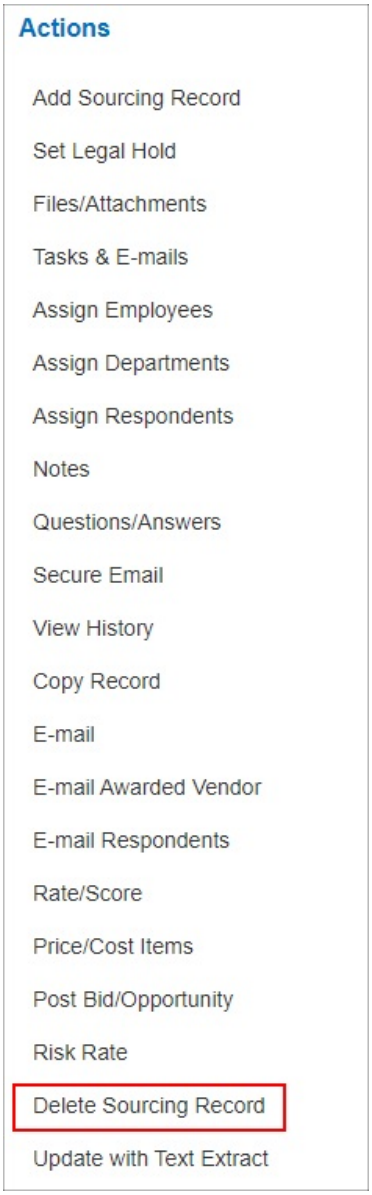
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4. Click **Return to Task Details** on the side menu when finished assigning/un-assigning additional employees.

Delete the task

1. To delete the task, click **Delete** on the side menu of the **Task Details** screen.
2. Confirm the deletion by clicking **Yes, delete it**.
3. Cancel the deletion by clicking **No, Cancel the delete**.



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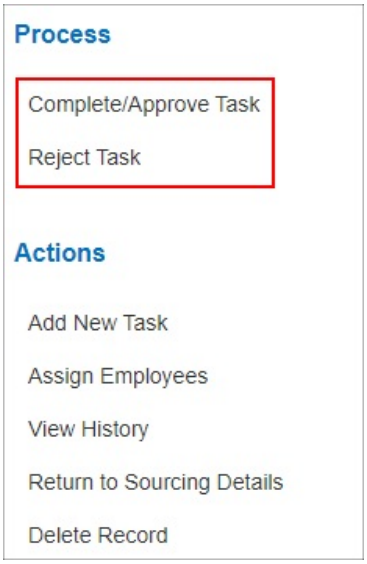
Add an additional task for the same solicitation record

1. To add another task, click **Add New Task** on the side menu of the **Task Details** screen.
2. This opens the **Add New Task** screen.



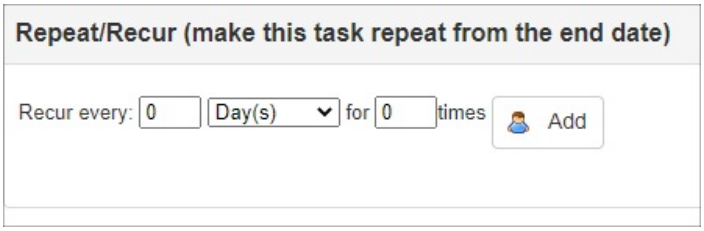
Mark the Task as being Completed or Rejected

1. To mark a Task as **Complete**, click **Complete** on the side menu of the **Task Details** screen
2. To mark a Task as **Rejected**, click **Reject** on the side menu of the **Task Details** screen.



Set the task to repeat/recur

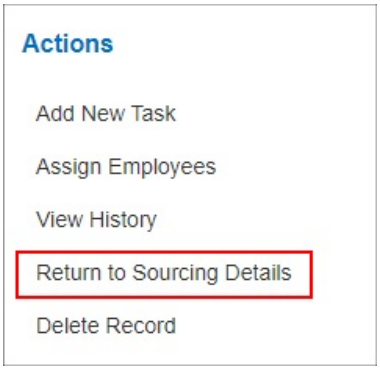
To set the task to repeat/recur, enter the repeat criteria into the appropriate boxes and click **Add**.



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Return to the Solicitation Details screen

Click **Return to Sourcing Details screen** on the side menu of the **Task Details** screen.



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6. Solicitations Workflow

Solicitations Workflow

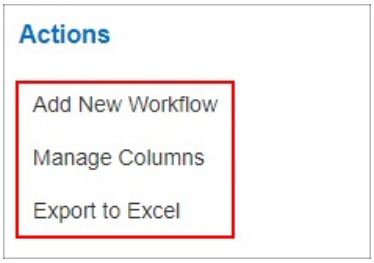
Solicitations: Workflow

Solicitation workflow can be accessed, added, and managed only by authorized/licensed users. Solicitation workflow tasks are predefined tasks that can be set up to be automatically applied to a solicitation's tasks section if the solicitation record meets specified criteria.

To Access Workflow

1. Open the **Manage/Setup** top navigation menu item.

2. Click **Workflow Manager** to open the **Workflow List Manager** screen.

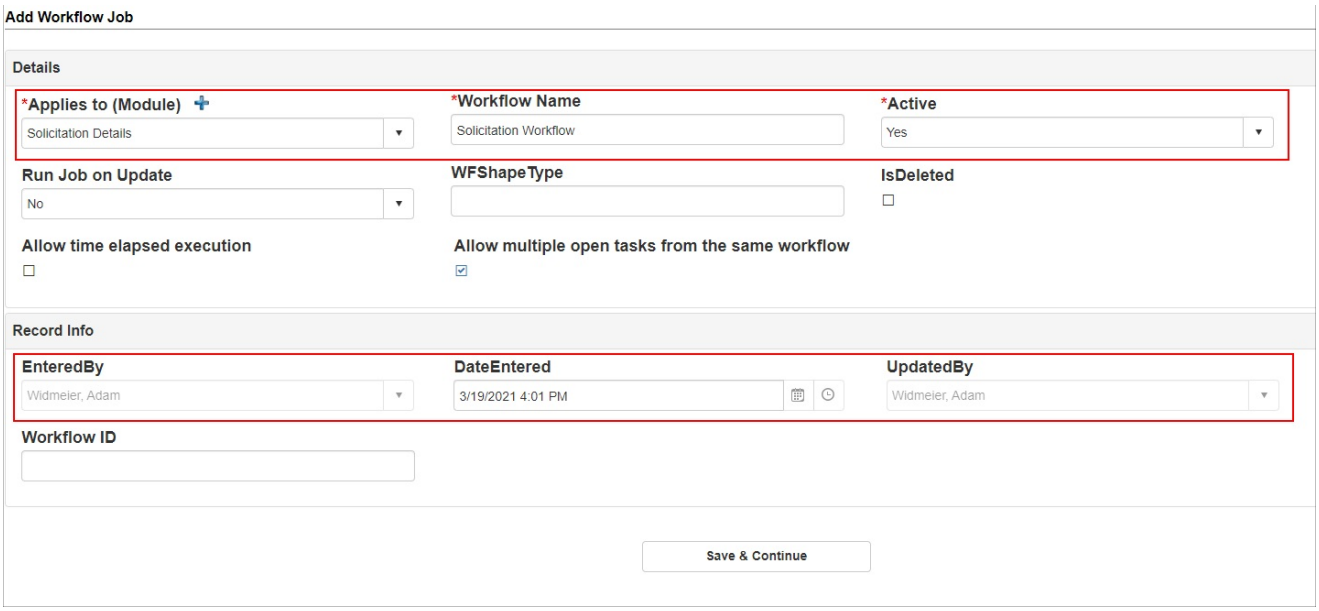


3. The **Workflow List Manager** screen lists all workflows that have been pre-defined for both contracts and solicitations.

Define a New Solicitation Workflow

1. On the side menu of the **Workflow List Manager**, click **Add New Workflow** to open the **Workflow Manager** screen.

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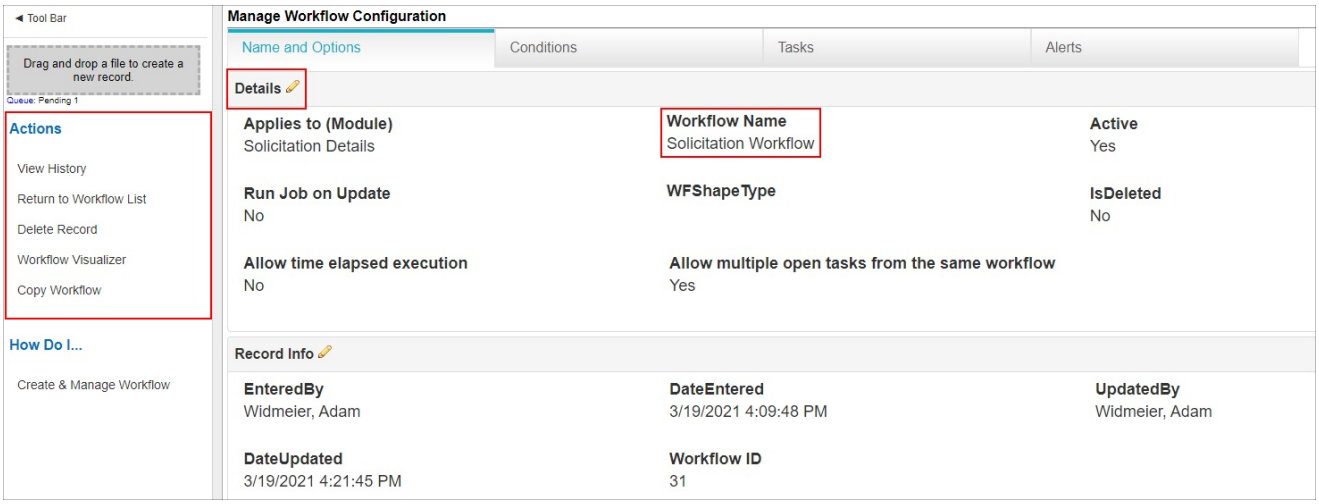


2. Enter all necessary information. Be sure to complete all required fields (those marked with a red asterisk).

3. The bottom areas marked above are read-only fields and will be populated automatically upon clicking **Continue**.

4. Once all necessary information has been entered, click **Continue** to save the new workflow.

5. Click **Cancel** on the side menu of the **Workflow Manager** screen to cancel adding a new workflow.



6. The **Workflow Configuration** screen opens for the new workflow just created.

7. Note the **pencil icon** ( ) next to some of the line items in the workflow details table. Clicking on the **pencil icon** will open the **Edit Field**. Edit the information and click **Save Changes** to save the edited information or **Cancel Changes** to cancel editing the information.

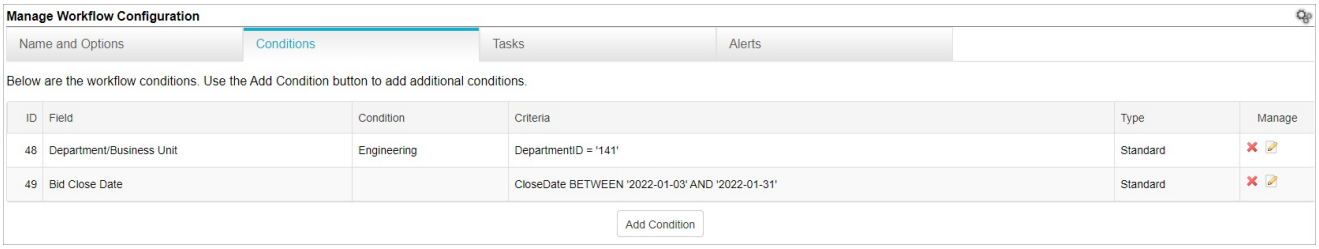
8. Note the side menu of the **Workflow Configuration** screen. This menu contains options to print the screen, go back to the **Workflow List Manager** screen, copy the workflow to a new workflow, and delete the workflow record.

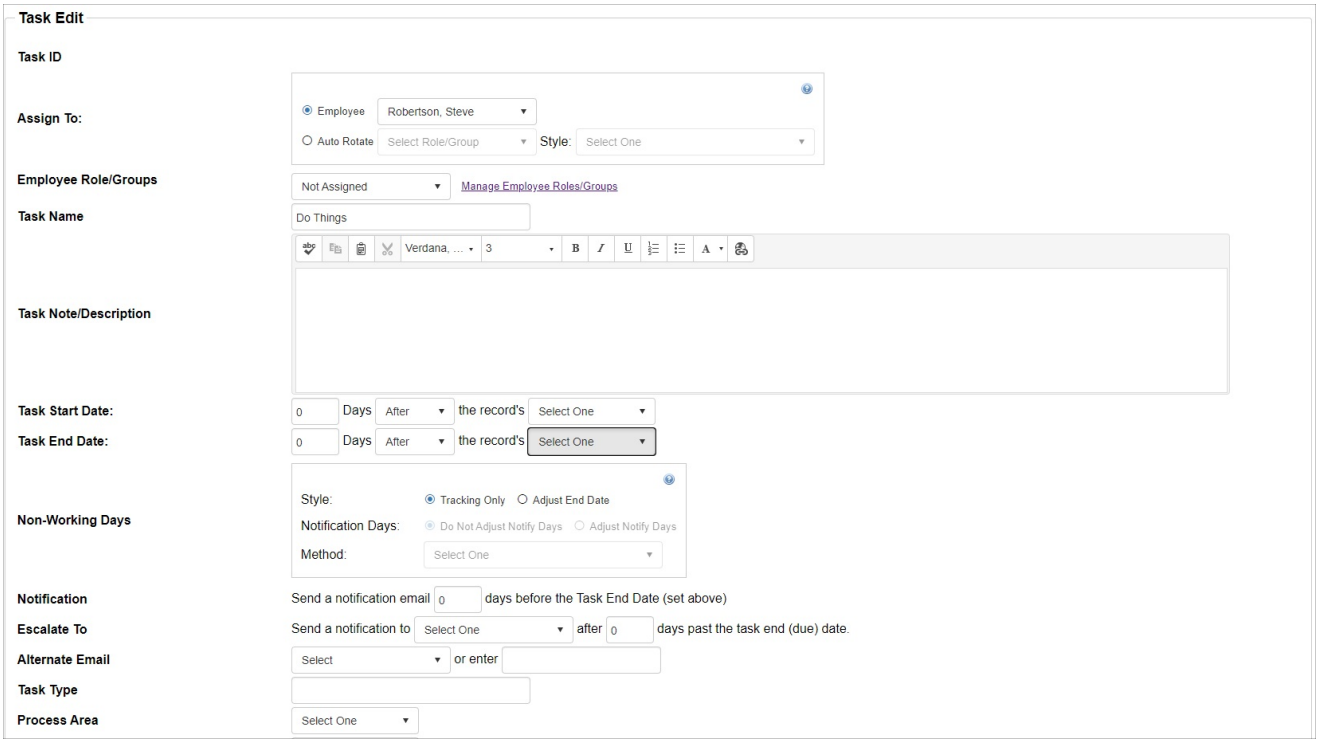
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9. From this screen, you can define tasks to be assigned to solicitation records automatically based on specific predefined criteria.

10. Click the **Conditions** tab to add the criteria. Add additional criteria to the workflow to declare more conditions for applying the workflow.

Criteria in the example below were added to declare that the **Department** assigned had to be Engineering for the solicitation record and the close date had to be between 01/03/2022 and 01/31/2022





11. Enter all necessary information for the task alert. Be sure to include: The employee to whom the alert will be sent

- The task title (what action needs to be taken)
- Any notes (if needed)

12. The task start date is optional; however, the task end date is important to enter to set when the task needs to be completed by.

13. Enter the number of days before the task end date you would like to send an additional alert to the employee (optional).

14. Optionally enter an **Escalate To** employee who will receive an alert if the task is not completed by the specified number of days after the task end date.

15. Click **Add** to add the task to the workflow or click **Clear** to cancel adding the task to the workflow.

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16. Once the workflow is entered, each new solicitation record that is added and meets the specified conditions will have the task automatically added to the **Tasks, E-mails, & Alerts** section of the solicitation details screen.

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7. Solicitation Attachments

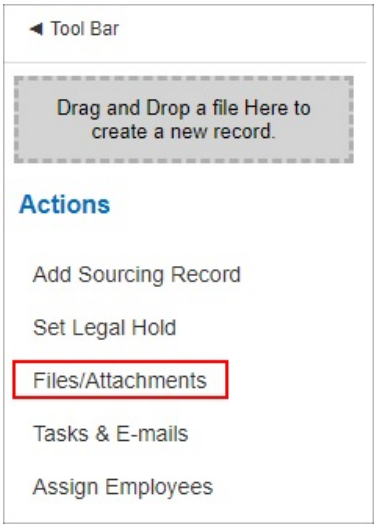
Solicitation Attachments

Solicitations: Attachments

Like in so many other areas of Contract Insight, files can be stored on individual solicitation records.

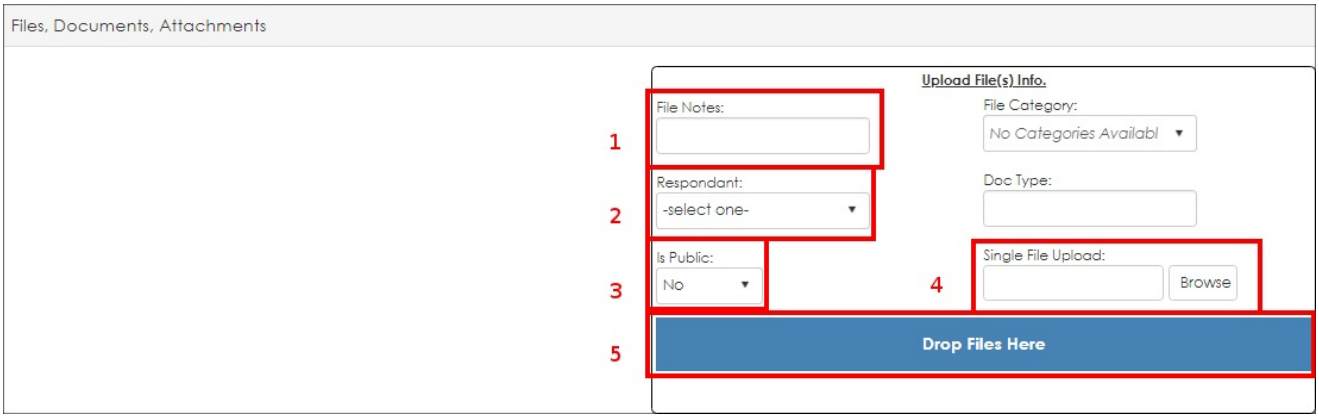
To Access the Attachments Section of the Solicitation Record

1. To access the attachments section of a solicitation record, click the **Files/Attachments** on the side menu of the **Solicitation Details** screen to open the **Files, Documents, Attachments** section of the solicitation record.



2. Alternatively, scroll down the **Solicitation Details** screen to the **Files, Documents, Attachments** section. Both methods go to the same place.

Adding, Managing & Viewing Attachments



1. Optionally, add any notes to the file (for example, if it is a final draft, 1st draft, etc.)

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2. The **Respondent** drop-down menu is mainly used for manually assigning attached files as being from a respondent (for example, if a respondent's documents are submitted via the postal service, the documents can be scanned and labeled as being from the respondent).

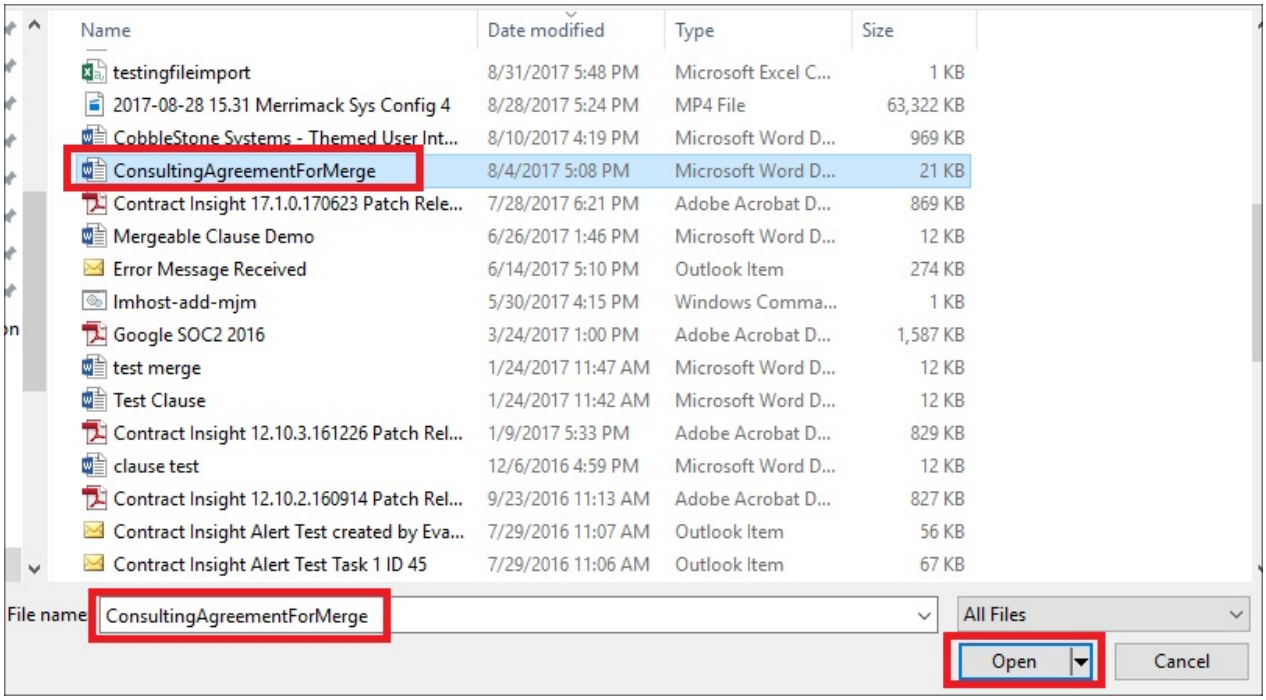
Note: When a respondent submits their documents through the **Vendor/Client Gateway**, that respondent's name will automatically be assigned to the documents for internal viewing.

3. Select if the document is to be public using the drop-down menu next to the **Public** label.

a. If Yes, Vendors/Clients will be allowed/enabled to see the document when viewing the solicitation in the **Vendor/Client Gateway** (optional Add-On). **Public** attachments are available to potential respondents when searching the **Solicitations Portal**.

b. Select No if the document is only being used for drafting/editing internally.

4. To add an attachment, click **Browse** to search for the document you would like to attach.



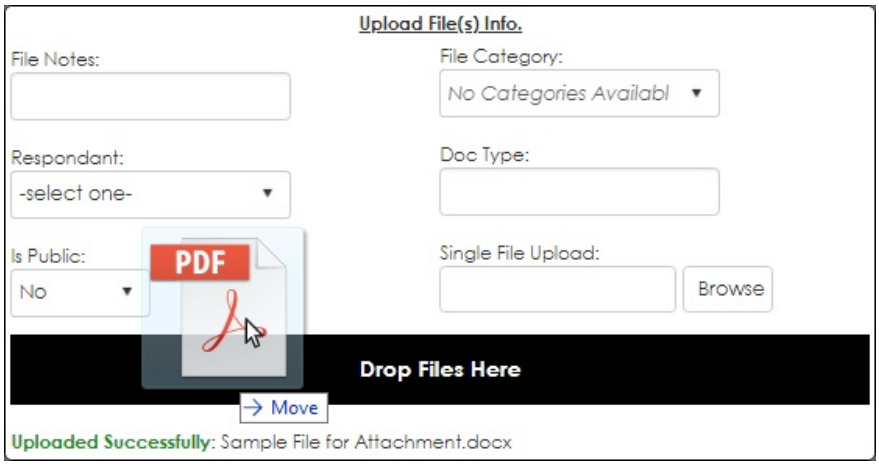
a. Select the file to attach to the solicitation record and click **Open**.

b. The file name/file address displays in the text-box and the file is uploaded to the record.

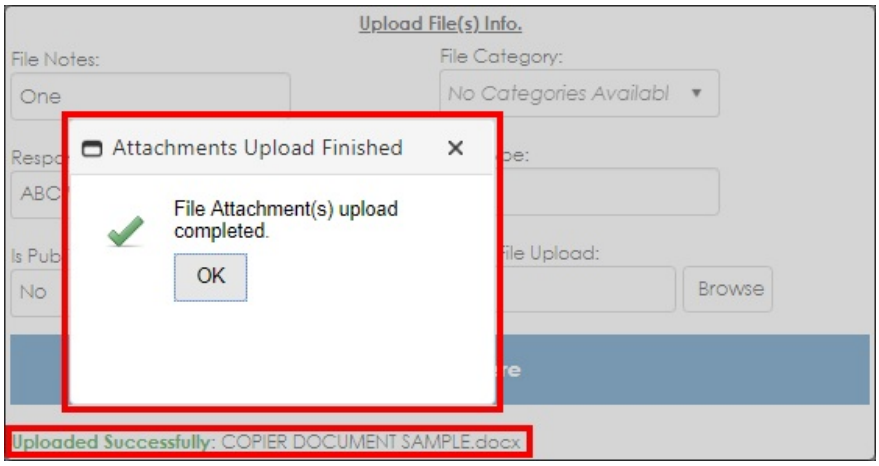
Note: After attaching and saving an attachment, do not click the browser's refresh button. Doing so will repeat the last action of attaching the file without warning or notification.

5. Alternatively, drag and drop the file(s) to be attached onto the blue rectangle labeled **Drop Files Here** (it may become black when a file is over it).

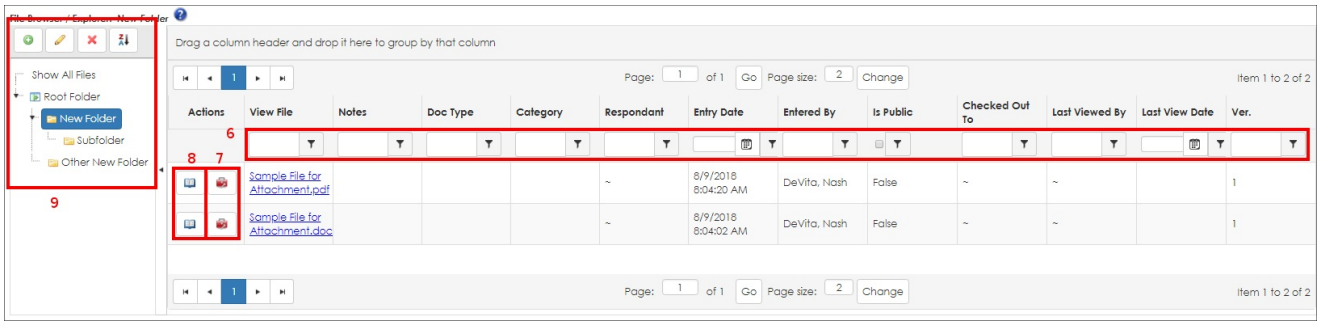
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When the file is attached, a pop-up window displays indicating the upload/attachment was successful. A message indicating the file name and the success also displays in the file upload area.



6. Filter the attachments displayed by entering in a keyword(s) under the column name by which to filter and then clicking the **filter icon** () to select how to filter the attachments.



Example:

To view just the attachments that have final in the notes section of the attachments, enter the word final into the text-box below the **Notes** header and click the **filter icon**. A user could then choose from a drop-down menu to have the filter for contains to just records with the word final.

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Only the attachments with a note containing the word final will show.

7. Attached files/documents can be managed via the **toolbox icon** ().

Within the toolbox, options for the following are present:

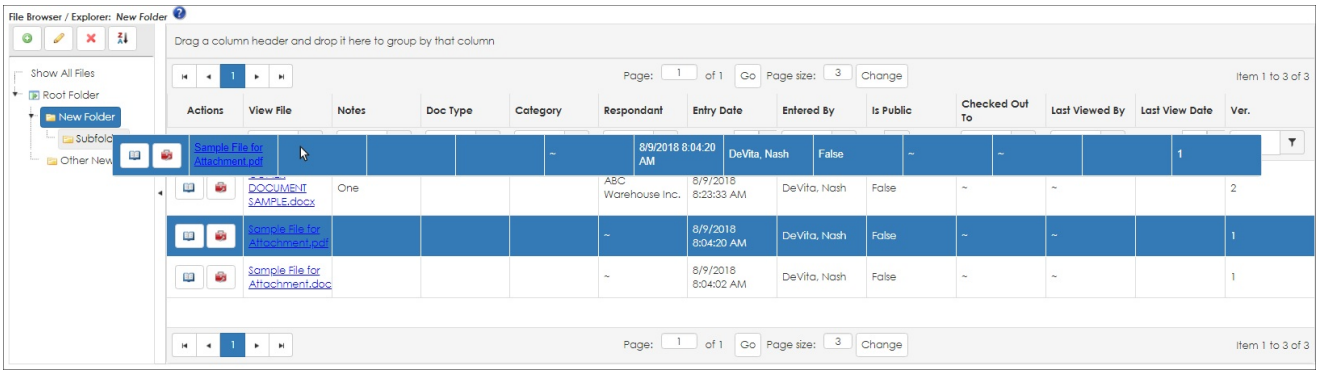
- Esign the Document
- Manage the Document
- Run a text comparison with another document attached to the record
- Lock/Unlock access to the file
- OCR the file
- Set download options
- View the file's history

8. Click the book icon () to preview the file/attachment without downloading it.

9. Create new folders by first selecting the parent folder and clicking the plus icon (). Multiple layers of folders can be created this way.

a. Click the file line item to have the row turn blue.

b. Drag and drop the file to the desired folder.



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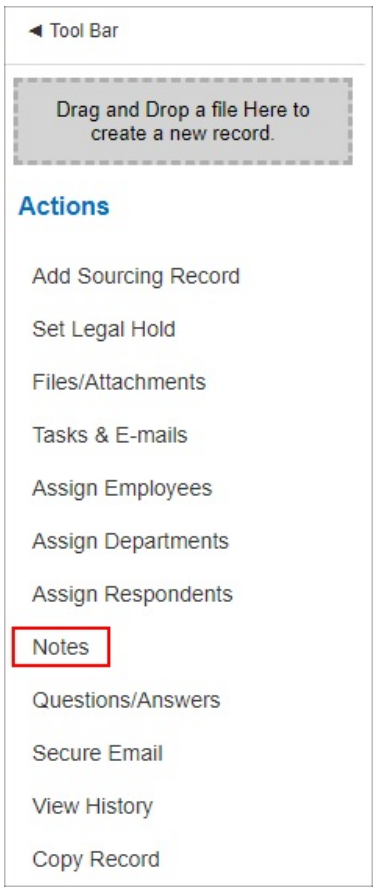
8. Solicitation Notes & Comments

Solicitation Notes & Comments

Solicitations: Notes & Comments

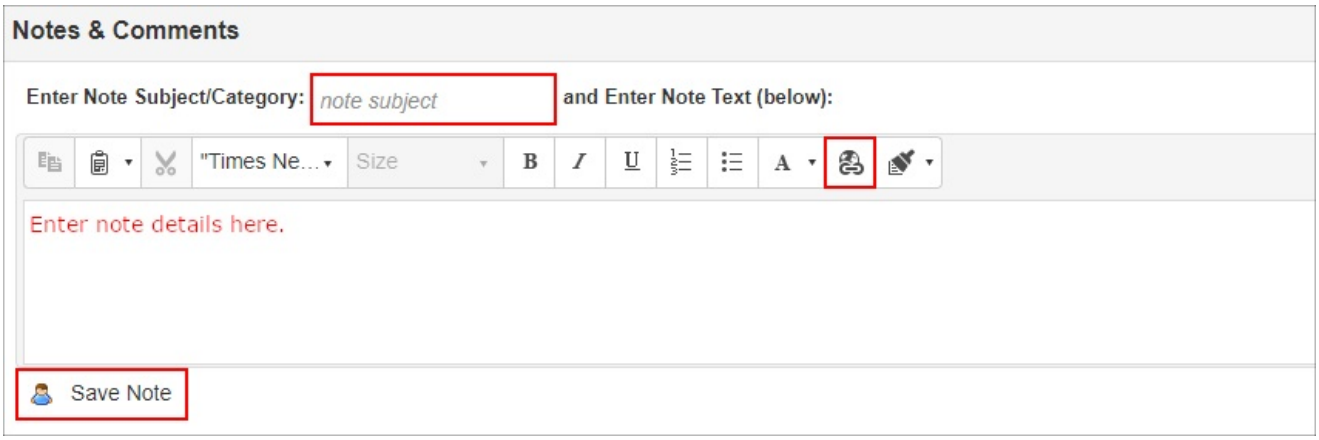
CobbleStone enables users to add notes and comments to solicitation records. These notes are useful for documenting events/details that occurred with the solicitation record.

To access the **Notes & Comments** section of the solicitation record, click **Notes** on the side menu of the **Solicitation Details** screen.



Alternatively, scroll down the **Solicitation Details** screen to the **Notes & Comments** section. Both methods go to the same section.

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1. To add a note, enter the note text into the Word-like text editor box.
2. Enter a note subject/category (specifying to what the note pertains) in the text-box above the text editor.
3. Optionally, add a hyperlink to the note by clicking the **hyperlink icon**.
4. Once the note/comment has been entered, click **Save Note** to save the note to the solicitation record.
5. The saved note will display at the bottom of the **Notes & Comments** section.
6. To delete a note, click **Delete** for the line item you would like to remove.

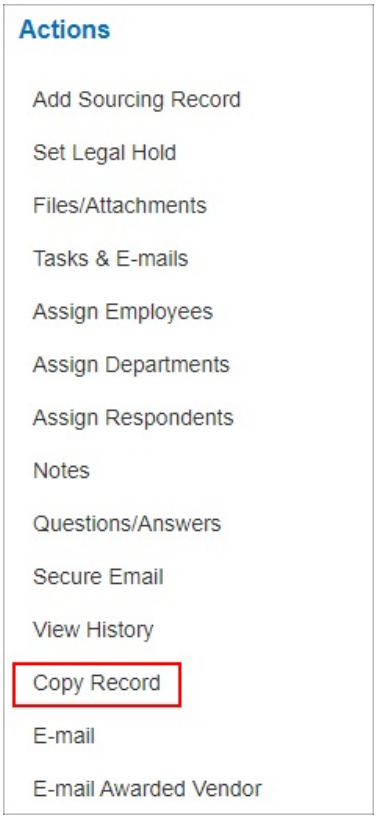
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9. Copy a Solicitation Record

Copy a Solicitation Record

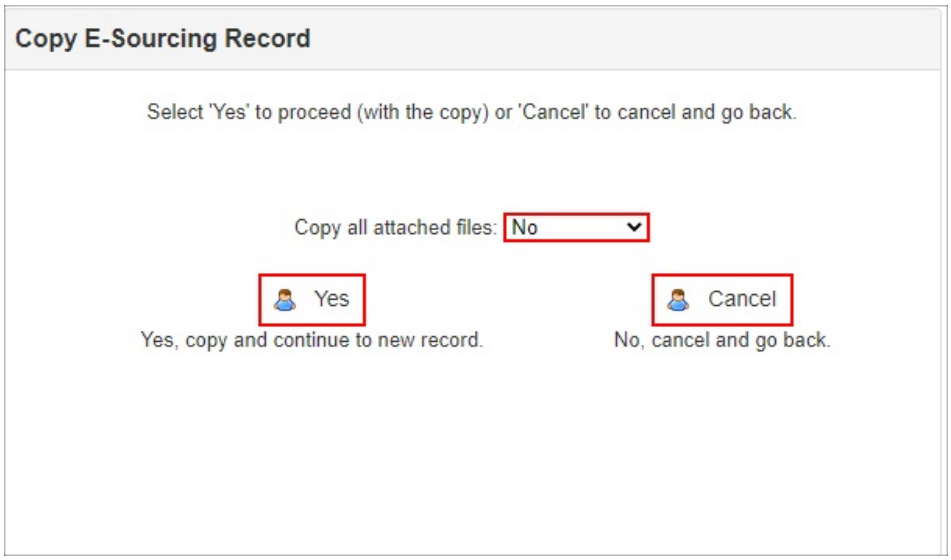
Solicitations: Copy a Record

CobbleStone enables users to copy solicitation records. This can be useful for auto-renewing a solicitation (copy a solicitation and update information by way of editing fields).



1. On the side menu of the **Solicitation Details** screen, click **Copy Record** to open the **Copy Solicitation** screen:

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2. Specify if all files/documents attached to the original solicitation record (the record you are copying) are to be copied to the new solicitation record using the **Yes/No** drop-down box.

3. Select **Yes** to copy the solicitation to make a new record or **Cancel** to cancel copying and return to the **Solicitation Details** screen.

4. If **Yes** is selected, a new solicitation record will be made with the same information as the original solicitation.

5. The **Solicitation Details** screen of the **new** solicitation record displays. Change and update the information as needed.

Note: Attached files that are marked as **Public=True** for the original solicitation record will, by default, be copied to the new solicitation record as **Public=False**.

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10. Link a Contract to a Solicitation Record

Link a Contract to a Solicitation Record

Solicitations: Link to a Contract Record

Once a respondent to a solicitation has been awarded, Contract Insight enables permits linking of the solicitation record to the contract record that has been created because of the solicitation.

1. On the **Solicitation Details** screen, click **Link to Existing Contracts** on the side menu to open the **Link Contracts** screen.



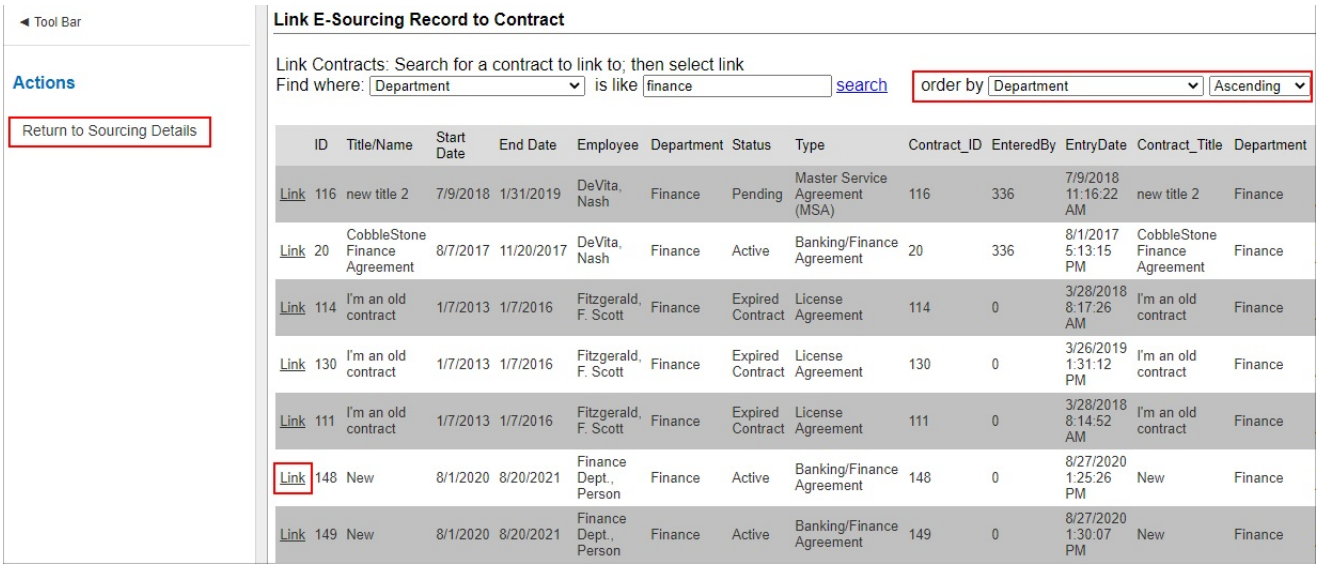


3. From the drop-down menu, select the contract record field by which to search for the desired record.

4. Enter the search keyword(s)/criteria by which to search in the **is like** text-box.

5. Click **Search** to display all contracts meeting the search criteria.

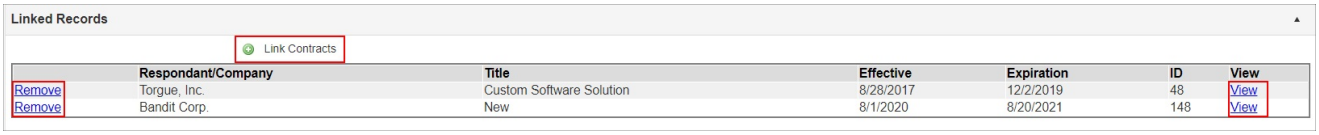
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6. Sort the search results by specific criteria using the **Order by** drop-down menus.

7. Once the results are displayed and the contract record to link displays, click **Link** for the corresponding contract record to create a link to the solicitation record.

8. The **Solicitation Details** screen displays on which the linked contract record will show at the bottom of the screen in the **Linked Contracts** section.



9.Within the **Linked Contracts** section, view the contract record that is linked to the solicitation record, remove the link between the solicitation record and the contract record, or link another contract record (i.e. there were several awarded respondents).

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11. Create a Contract from a Solicitation Record

Create a Contract from a Solicitation Record

Solicitations: Create a Contract Record from a Solicitation Record

CobbleStone allows users to copy the information from a **Solicitation Details** record to a new **Contract Details** record. Please note that only users with the proper permissions may use this function.

To copy the information from the Solicitation Details screen to a new contract record

1. On the Solicitation Record to copy to a contract, click **New Contract Record** on the side menu.



2. The **Add New Contract** screen displays with the specified Solicitation Details field information populating the specified Contract Details fields.

3. The information entered for the **Projected Contract Data** will be populated into the specified Contract Record fields.

Note: See the Field Mapper Wiki page for more information on mapping data from the Solicitation Details screen.

4. Once any additional necessary/required contract record information has been entered, click **Continue**. The new **Contract Details** screen for the contract record displays.

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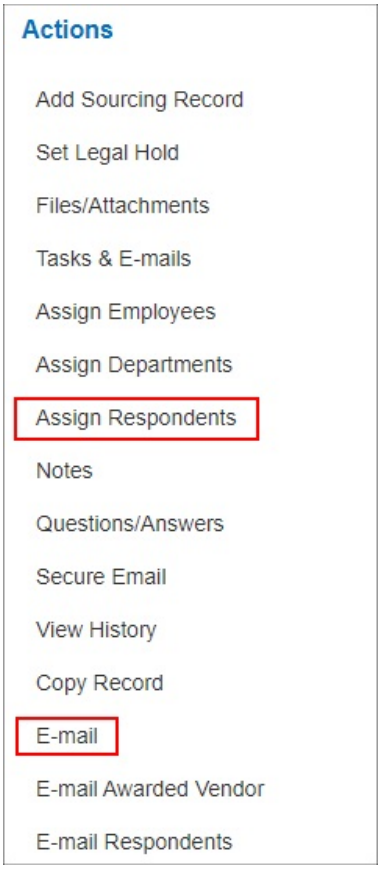
12. Assign/Email Respondents to Solicitation Records

Assign/Email Respondents to Solicitation Records

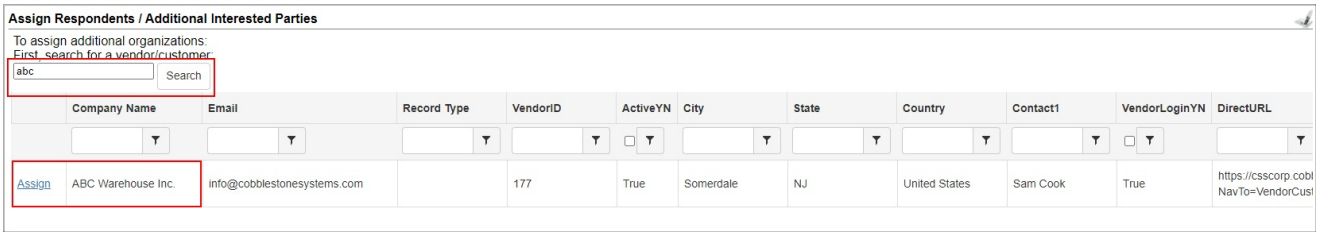
Solicitations: Assign Email Respondents

Assign Potentially Interested Vendors/Clients to a Solicitation Record

1. On the side menu of the **Solicitation Details** screen, click **Assign Respondents**.

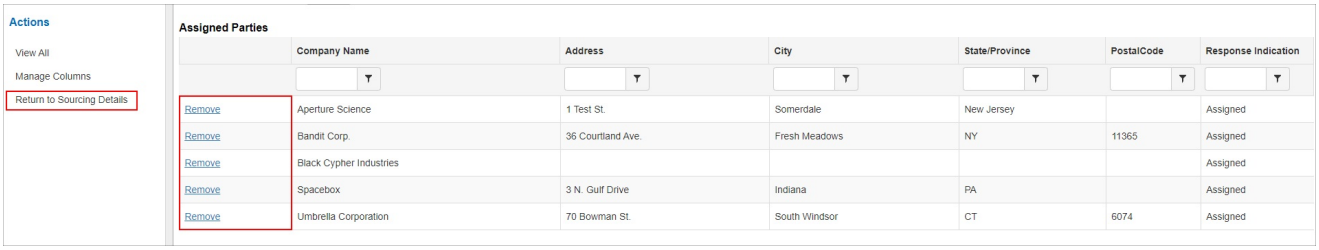


2. The **Assign Respondents/Additional Interested Parties** screen displays.



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3. To assign a company, search for them using the keyword search box and click **Assign** for the company from the results list. To unassign a company, click **Remove** next to the company in the list of assigned respondents.



4. Once the appropriate parties have been assigned/unassigned, click **Return to Sourcing Details** on the side menu to return to the **Solicitation Details** screen.

Email Solicitation Information to Potentially Interested Vendors/Clients

1. On the side menu of the **Solicitation Details** screen, click **E-mail** to open the Contract Insight e-mailer from which solicitation notices to any of the additional respondents selected in **Assign Respondents** can be sent.

2. If the vendor/client has information (including an e-mail address) in the system already, the contact e-mail address will be automatically placed into the **Blind Copy To** box.

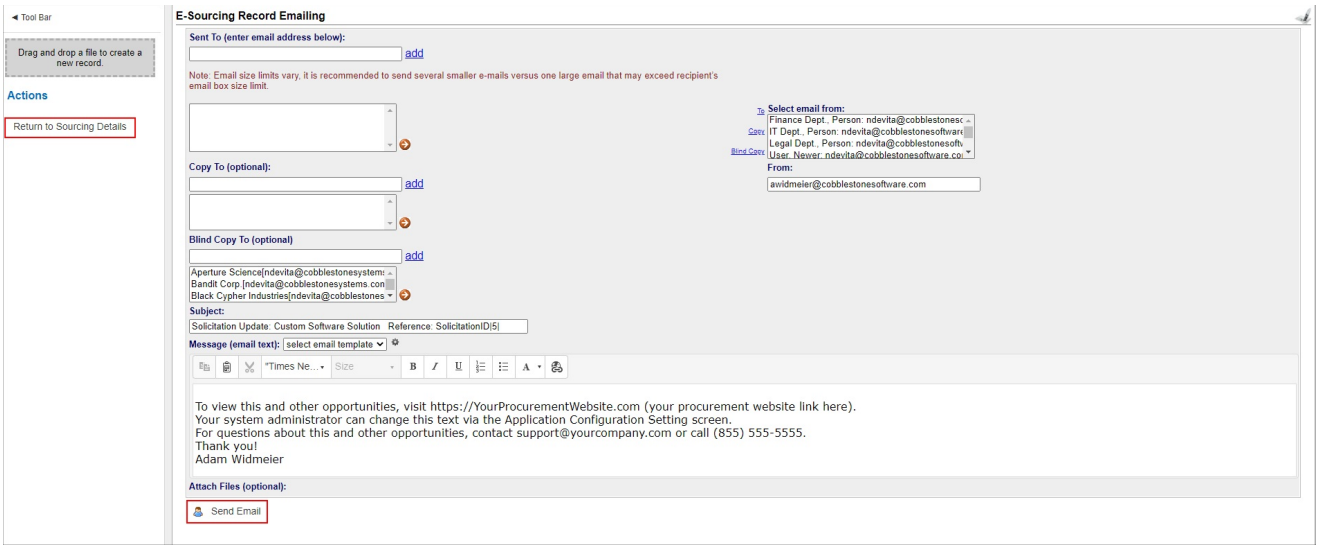
a. The **Blind Copy To** section sends the e-mail to each e-mail address separately (the recipient cannot see the names or e-mail addresses of other recipients.

b. For an e-mail address of a vendor/client that is not currently in your system, add it into the textbox and click **Add** to place it in the **Blind Copy To** list.

3. Mark the box of any additional attachments to send with the solicitation announcement (optional).

4. Click **Send E-mail** to send the e-mail or click **Return to Sourcing Details** on the side menu of the e-mail screen to cancel sending the e-mail.

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13. Assigning Employees/Alerts for Solicitation records

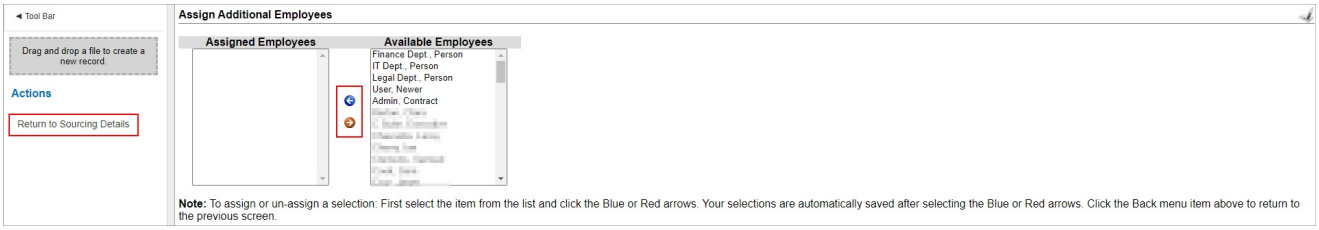
Assigning Employees/Alerts for Solicitation Records

Solicitations: Assigning Employees for Alerts

1. To assign additional employees to the solicitation record (to receive alerts), click **Assign Employees** on the side menu of the **Solicitation Details** screen.



2. The **Assign Employees** screen displays.



3. In the **Available Employees** box, click the name of the employee to assign and click the **Blue Arrow** to move the name to the **Assigned Employees** box.

4. In the **Assigned Employees** box highlight the name of the employee you would like to un-assign and click the **Red Arrow** to move the employee's name from the **Available Employees** box.

5. When assignment of employees to the solicitation record is complete, on the side menu of the **Assign Employees** screen, click **Return to Sourcing Details**.

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14. Rating & Scoring Solicitation Respondents

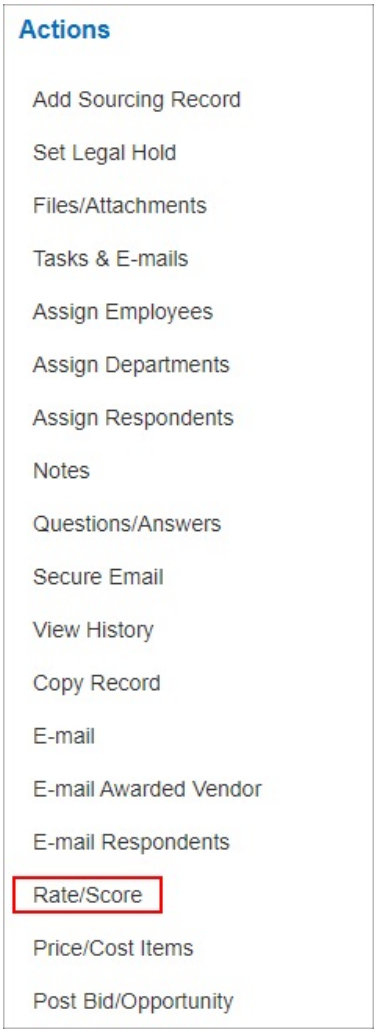
Rating & Scoring Solicitation Respondents

Solicitations: Rating & Scoring Respondents

Once the solicitation closes, the assigned group/employee(s) should review the respondents' responses and assign a rating for each area of the scorecard.

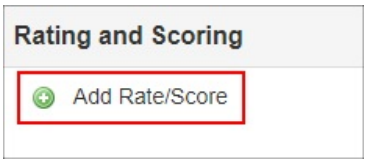
Rating/Scoring a Respondent

1. To access the **Rating & Scorecard** section of the solicitation record, click **Rate/Score** on the side menu of the **Solicitation Details** screen. Alternatively, navigate to the **Rating and Scoring** section by scrolling down the **Solicitation Details** screen. Both methods go to the same section.

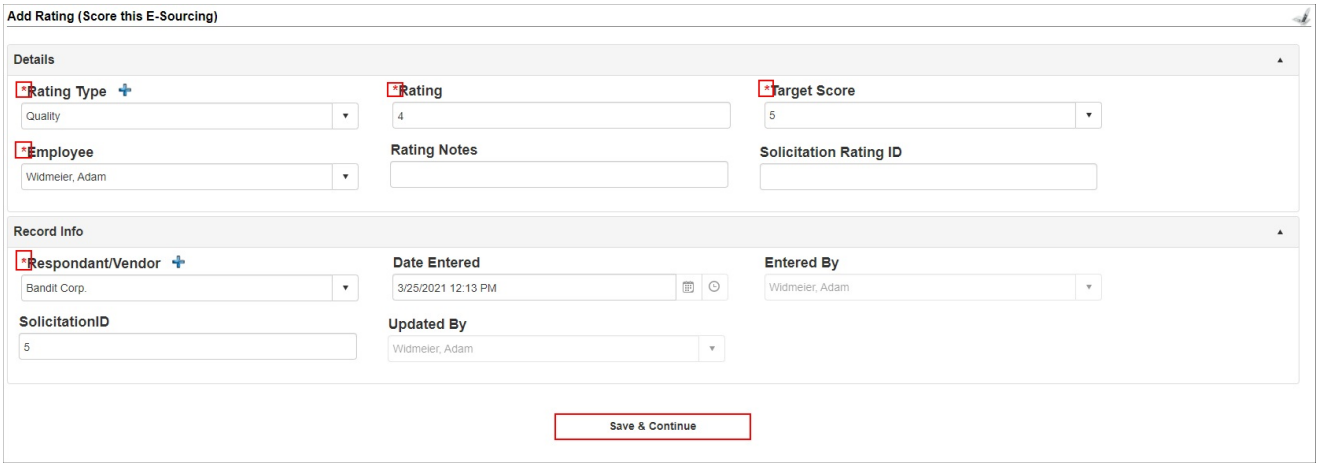


2. Click **Add Rate/Score** to add a respondent rating to open the **Add Rating (Score this E-Sourcing)** screen on which respondent rating is entered.

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3. Enter all necessary information into the scorecard. Be sure to populate all required fields (marked by a red asterisk).



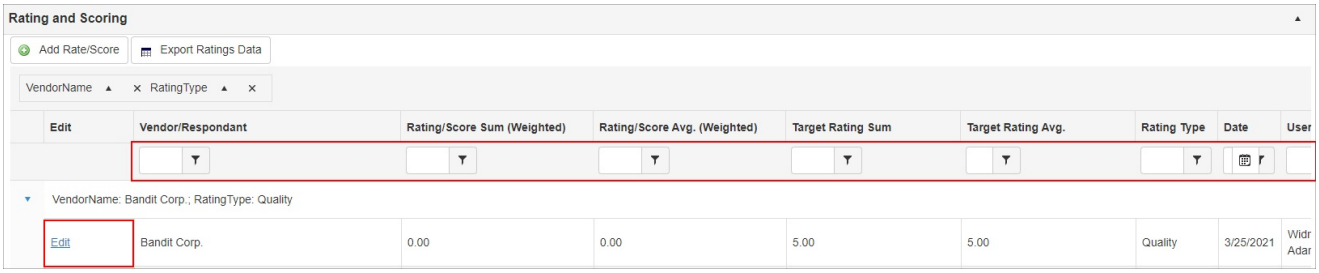
4. The grayed-out fields are read-only and will be automatically populated upon clicking **Save & Continue**.

5. The **Rating Type** is a user-definable field that can be edited by navigating to **Manage/Setup - Manage Fields – Field Manager**. Only authorized/licensed users may access to and capability to manage items within the **Field Manager**.

6. Once all necessary/required information has been entered, click **Save & Continue** to save the new rating. Click **Return to Sourcing Details** button on the side menu to cancel the new rating. Both options return the user to the **Solicitation Details** screen.

7. After adding the new rating, the **Rating and Scoring** section of the solicitation record displays the new scorecard results. As each **Rating Type** is completed and saved, the vendor's score is averaged.

8. Filter the scoring/rating card by entering a keyword(s) and clicking the **filter icons** for each corresponding column.

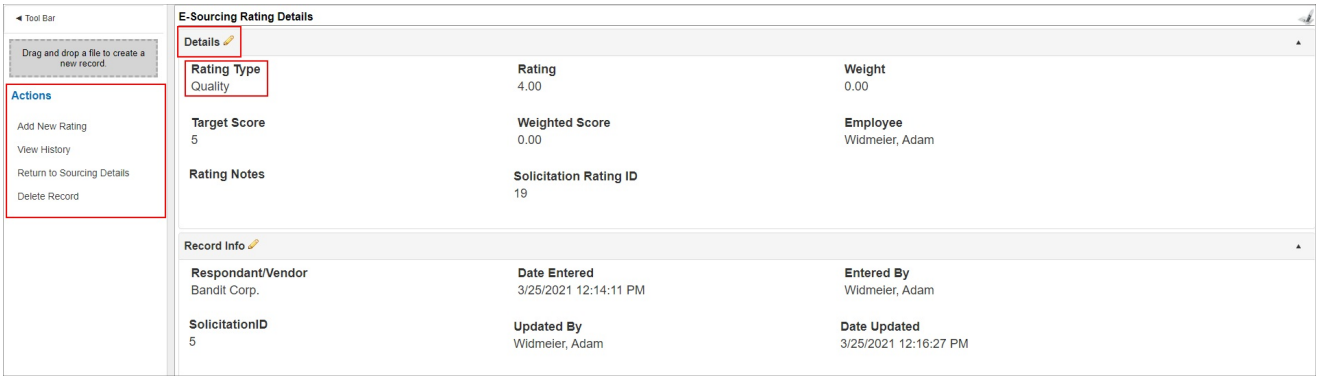


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Editing a Rating/Scorecard

1. To edit the scorecard, click **Edit** for the line item for which changes are to be made.

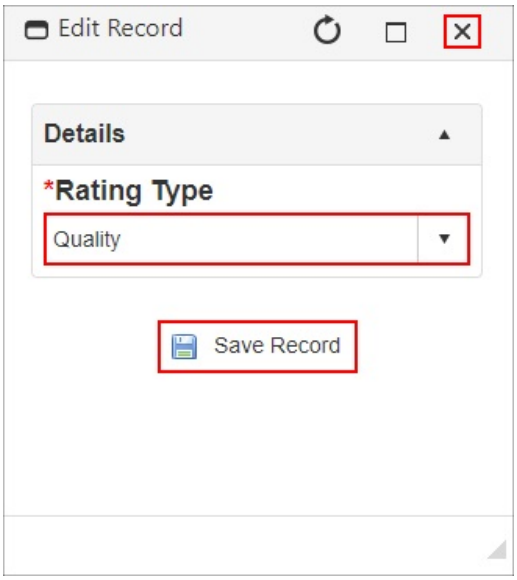
2. The **E-Sourcing Rating Details** screen on which users edit line items, print the screen, view the history of the scorecard, delete the scorecard record, or add a new rating displays.



3. Click the **pencil icon** for the field to edit to open the **Edit Field** screen.

Note: click the **pencil icon** for the entire field group to edit multiple fields at once, such as next to Details in the above screenshot.

4. Once the desired change has been made, click **Save Record**.

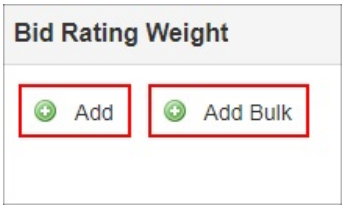


5. Cancel the change made by clicking the **X** in the upper-right corner.

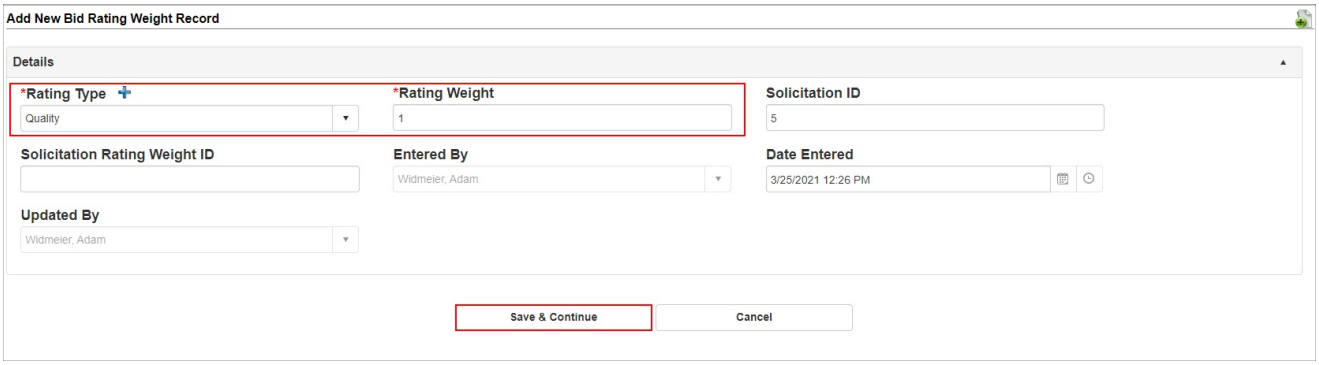
Bid Rating Weight

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On the Solicitations page you can add weighting to the rating and scoring in the Bid Rating Weight table.



Clicking the **Add** button will allow for the creation of a rating weight.



Select a **Rating Type** that the weight will apply to and the **Rating Weight** is to be applied in a percentile manner to affect the score of ratings.

Export Scoring

It is of critical importance to understand where clients stand regarding one's company. Cobblestone offers a functionality that lets users export a ratings sub-table to an excel sheet with a new Export button.

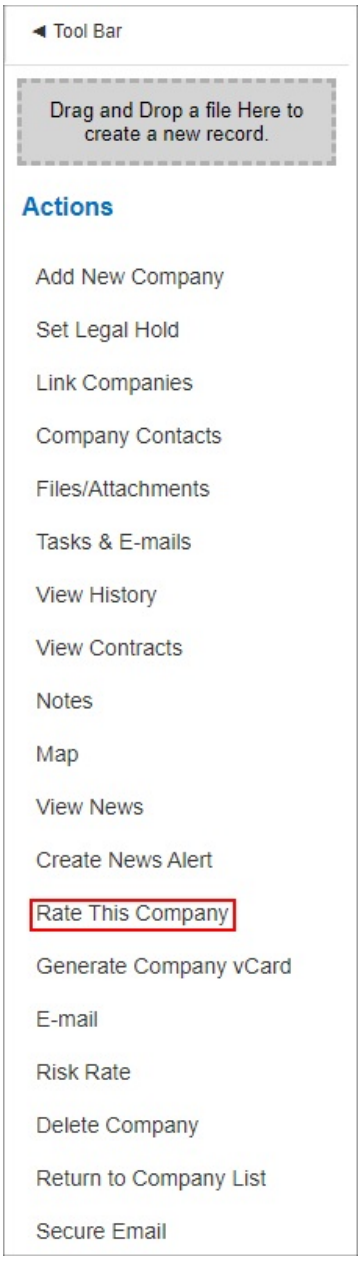
1. Click the **e-Sourcing** dropdown.

2. Click **Find/Search Solicitations**.

3. Find the client that warrants a review.

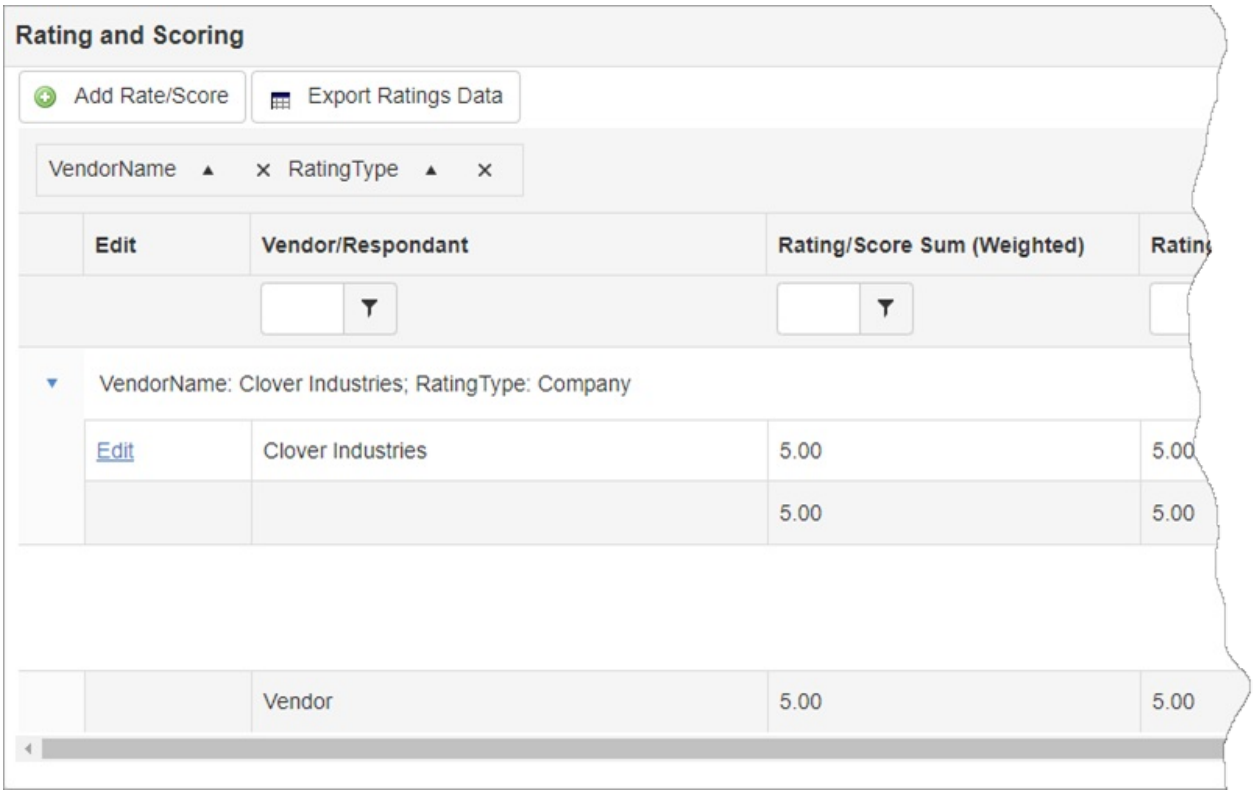
4. On the side menu, click **Rate/Score**.

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5. Click the **Export Ratings Data** button.

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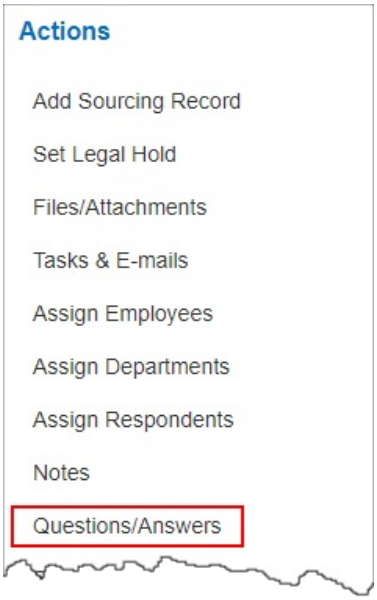
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15. Solicitations Questions & Answers

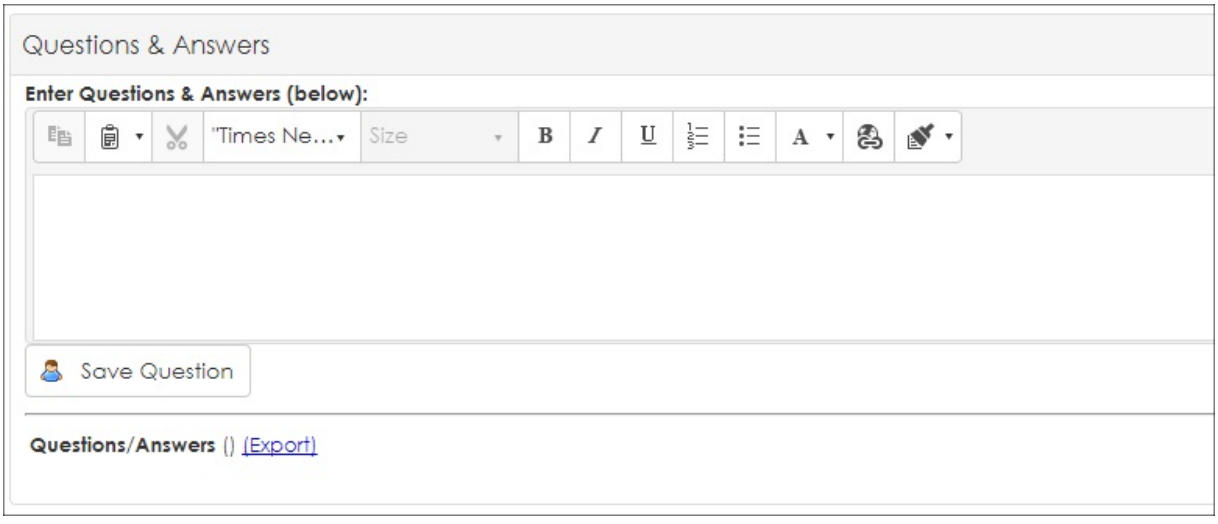
Solicitations Questions & Answers

Solicitations: Questions & Answers

1. To access the **Questions/Answers** section of the record, click the **Questions/Answers** on the side menu of the **Solicitation Details** screen. Alternatively, scroll down the Solicitation Details screen to access the Questions/Answers section of the record. Both methods go to the same section.

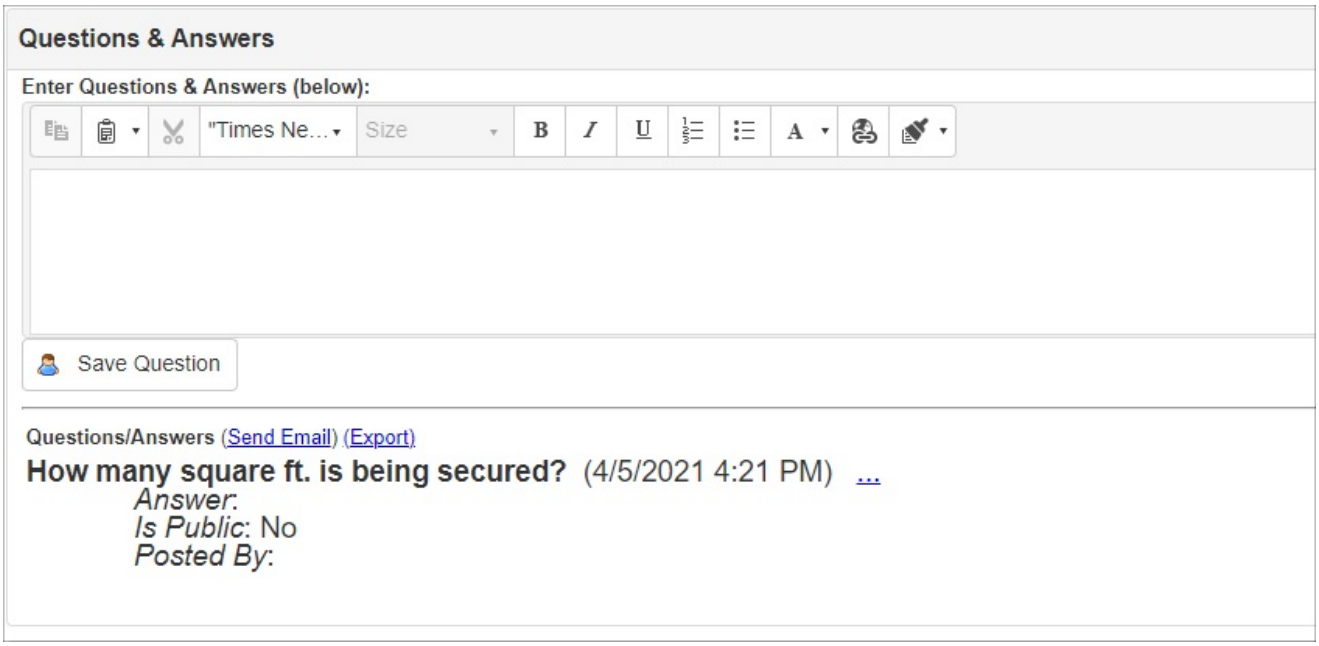


2. As respondents ask questions through the **Vendor/Client Gateway**, the questions will be posted in this section.



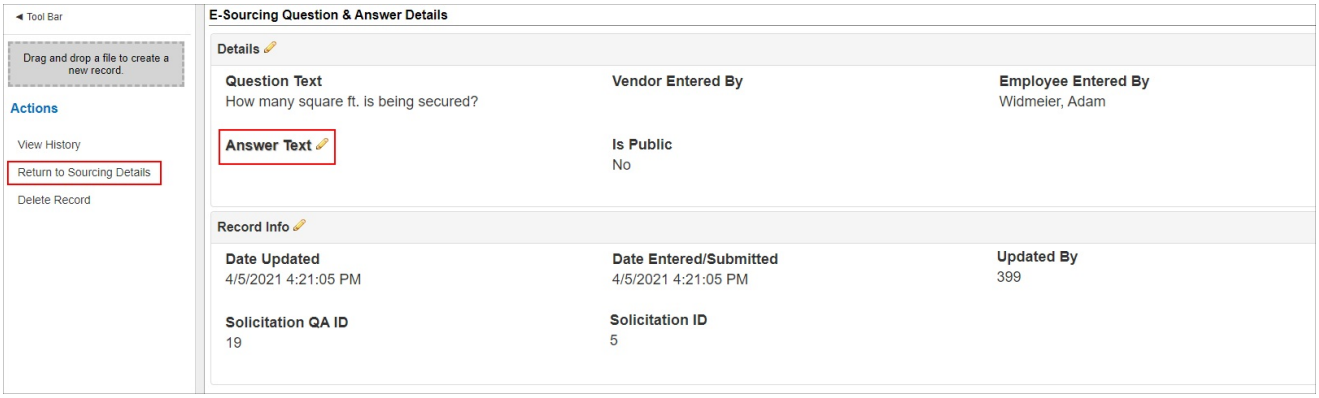
3. To answer a question, click the ellipsis (...).

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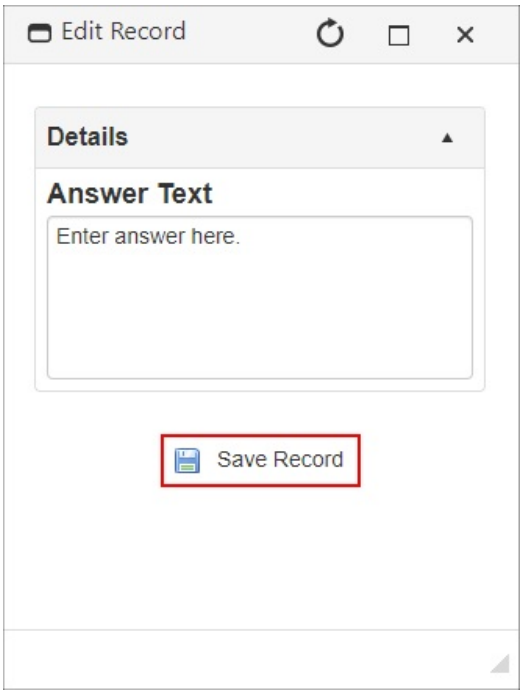
4. The **Rate and Score** screen on which a user can view the details of the question and provide an answer displays.

5. Click the **pencil icon** for the **Answer Text** line item to answer the respondent's question.



6. Enter the response to the question in the text box provided. Click **Save Record** to send the response to the respondent or click the **X** in the upper-right corner to cancel responding to the respondent's question.

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7. The **Rate and Score** screen displays. Click **Return to Sourcing Details** to return to the details screen.

Note: The response shows under the question. The respondent will be able to see the answer in the **Vendor/Client Gateway**.

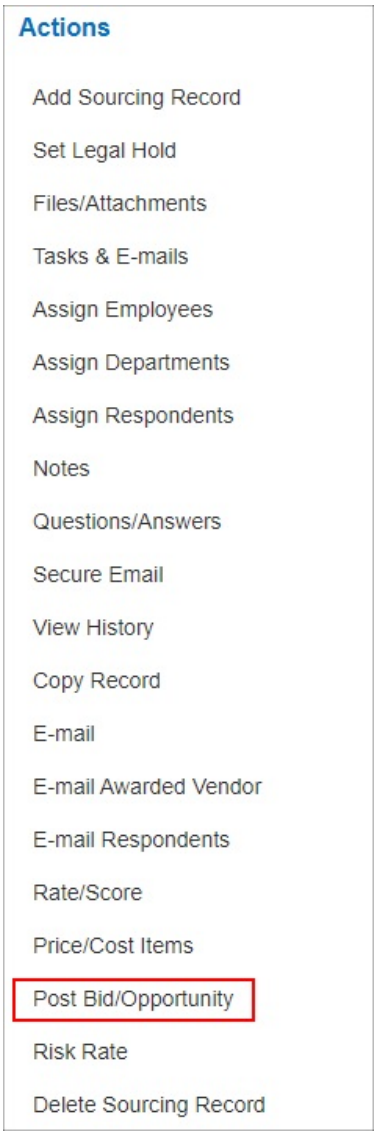
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16. Post Bid/Opportunity

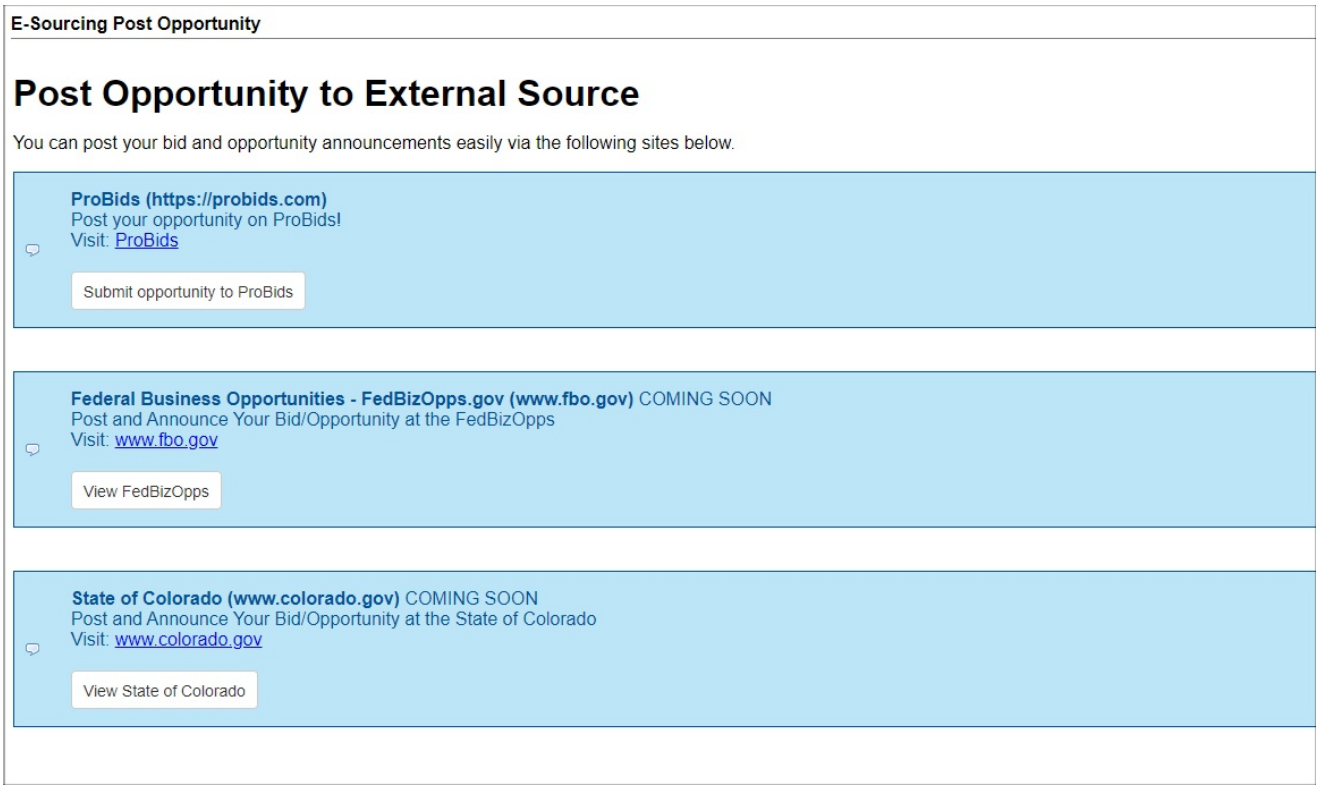
Post Bid/Opportunity

Solicitations: Post Bid

Open the **Post Bid/Opportunity** page by clicking **Post Bid/Opportunity** on the side menu of the **Solicitation Details** page.



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- **ProBids** is a public access portal where CobbleStone clients can post bids and opportunities online. ProBids advertises the bid, giving business daily opportunities to find exactly what they need.
- **ProBids** also allows people to search through contractors, sorting through thousands at a time to find contractors in the area who are ready to help whenever needed. Signing up is free, easy, and available on the go via the App Store and Google Play.
- If a client wants to suggest additional vendors to be added to **ProBids**, they should email their support or implementation rep to have that vendor added. They can also suggest sites for Contract Insight with which to also post bids (like the coming Federal Business Opportunities and State of Colorado).

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17. Product Service Codes

Product Service Codes

Solicitations: Product Service Codes

The **Solicitation record details** screen allows for the setup and specification of product/service code assignment onto individual records. See the Product Service Catalog Wiki entry for more information on product/service codes. This functionality ties into product/service code assignment on vendor/customer records for vendor notification of public opportunities via product/service code matching. If changes occur within the record to product/service codes, E-Sourcing Change Notification email are sent to vendors/customers who have specified the product/service code selected.

Adding a Product Service Code

1. Navigate to the desired solicitation record.

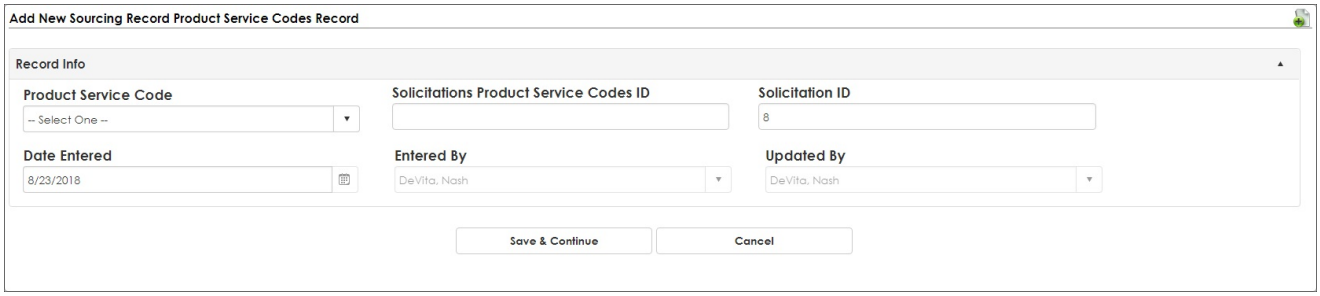
2. Scroll down to the **Sourcing Record Product Service Codes** section.

3. Click **Add**.



4. The **Add New Sourcing Record Product Service Codes Record** screen displays. Select the desired code from the **Product Service Code** pick-list.

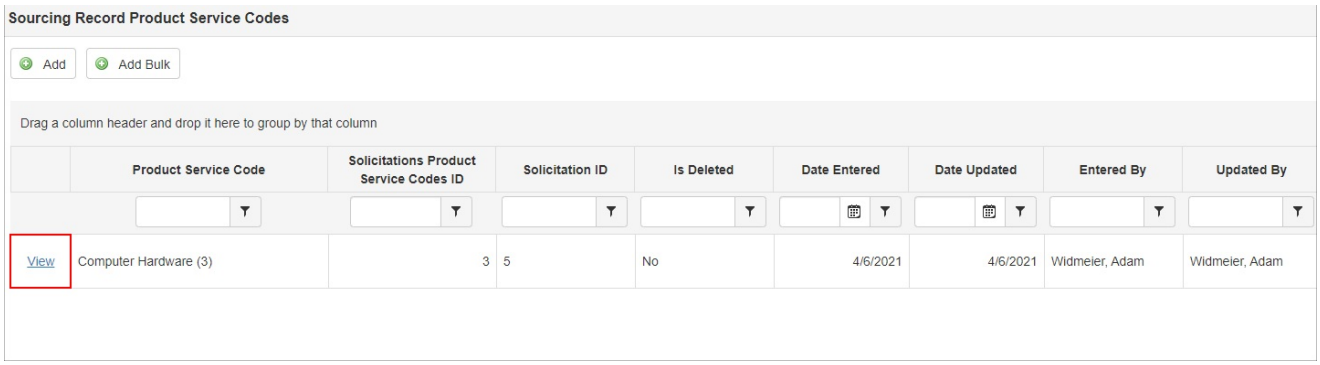
5. To associate the code with the selected solicitation record, click **Save & Continue**. To abort the process, click **Cancel**.
The **Solicitation Details** screen displays.



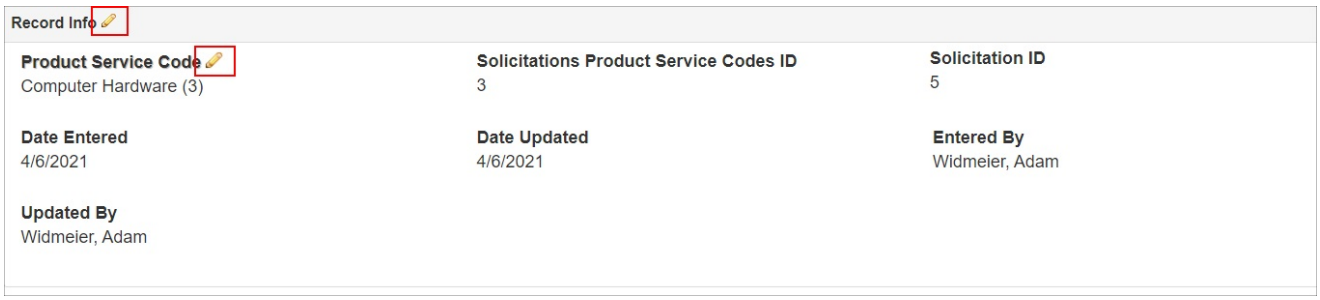
Editing a Product Service Code

1. Click **View** for the desired Product Service Code line item.

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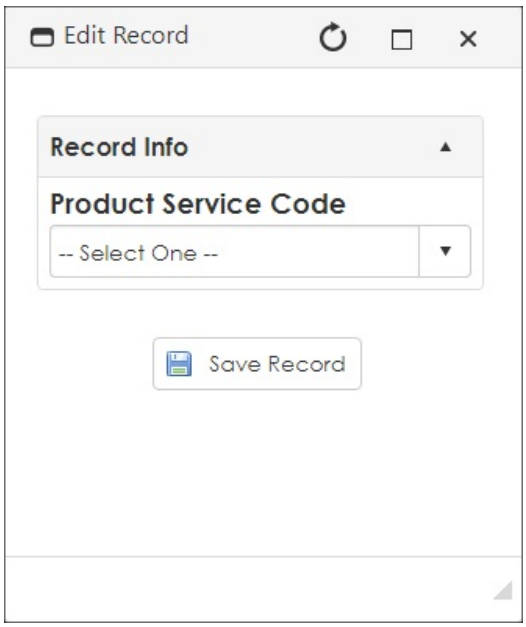
2. Click the **pencil icon** ( ) for the field or field group to alter.



3. An edit record pop-up window displays.

4. Change the value as necessary.

5. Click **Save Record**.



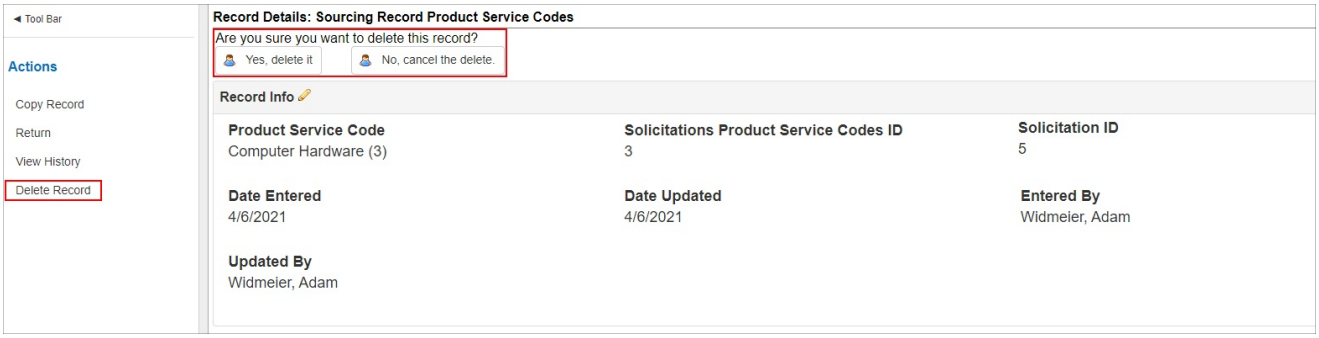
Deleting a Product Service Code from a Record

1. As above, click **View** for the desired Product Service Code line item.

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2. On the **Record Details: Sourcing Record Product Service Codes** screen's side menu, click **Delete Record**.

3. Click **Yes, delete it** to confirm or **No, cancel the delete** to reject the removal.



Note: When Product Service Codes are added/altered, a **Change Notification Email** is prepared.

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18. Dutch Auctions

Dutch Auctions

Solicitations: Product Service Codes

Dutch auctions are a solicitation record that is conducted in a reverse bidding process. Whereas a normal bidding process has numerous vendors competing for the lowest (or most qualified) price that a company must purchase a service from, a Dutch auction sees a price set by the company, that gradually decreases over time until a vendor places a bid. At this point, the price-decrease process stops, and the company reviews the vendors bid, and accept or reject it.

Setting up Dutch Auction Types

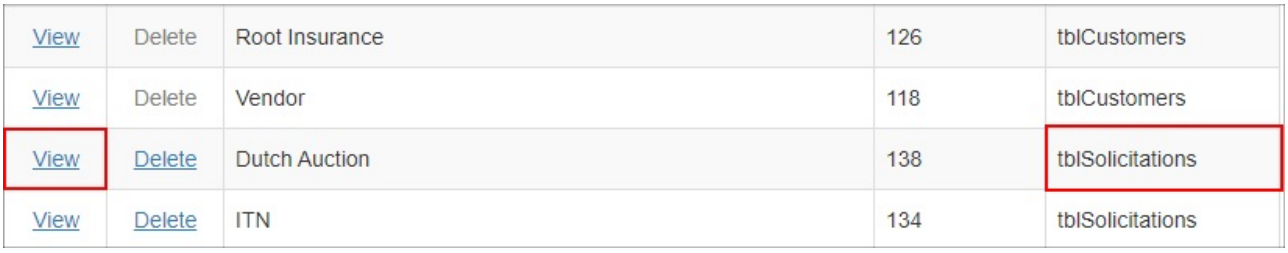
Out of the box, a solicitation type named Dutch Auction is present. Use that or create/modify your own type to operate as a Dutch auction.

Establishing a solicitation record type involves editing an existing type.

1. Navigate to **Manage/Setup - Record Types**.



2. Locate the desired solicitation type. To ensure you are selecting a solicitation type, in the ForArea column, look for tblSolicitations.



3. Click View for the desired line item.

4. Edit the **Is Dutch Auction** field. To make the type a Dutch auction, set the field to Yes.

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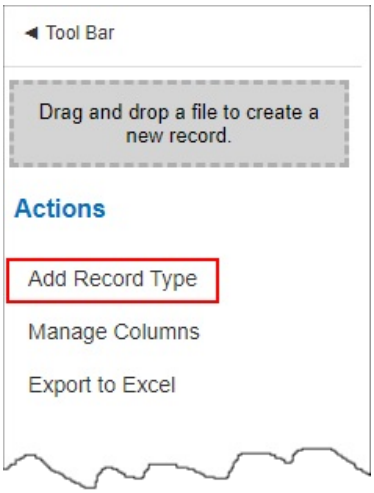


Alternatively, create a new solicitation type as a Dutch Auction.

1. Navigate to **Manage/Setup - Record Types**.

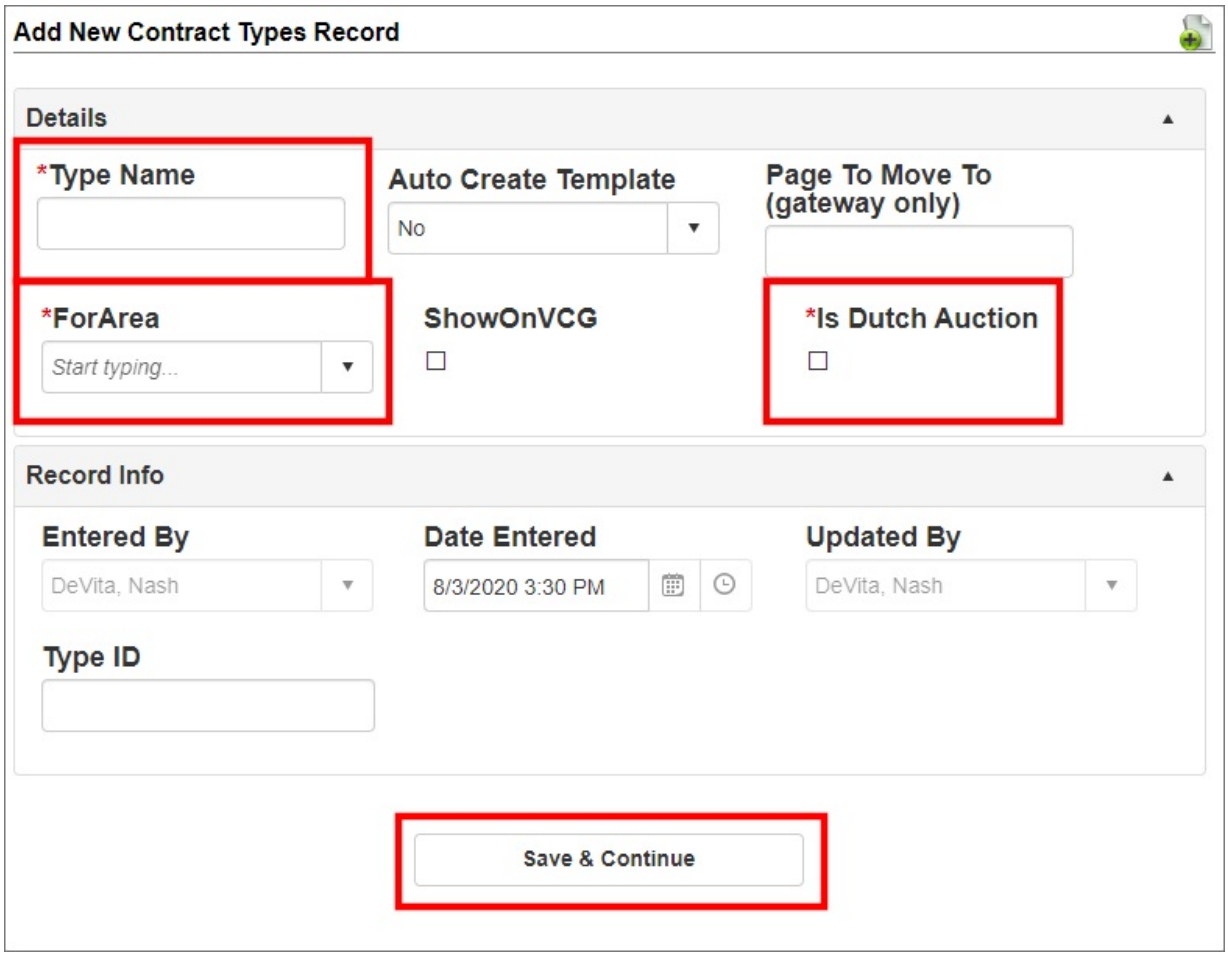


2. On the side menu, click **Add Record Type**.



3. The Add New Types screen displays. Enter a name for the new type.

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4. For the **ForArea** field, select Solicitation Details.

5. Mark the **Is Dutch Auction** tick box.

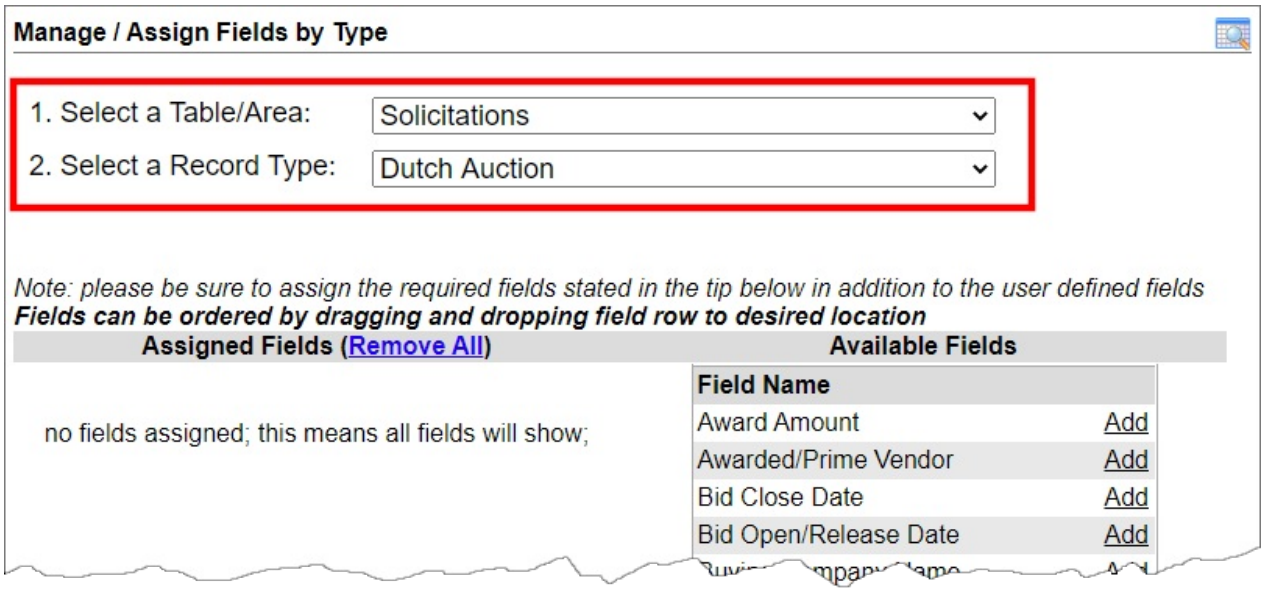
6. Click **Save & Continue**.

Setting up Dutch Auction Fields

1. Navigate to **Manage/Setup - Field Manager - Manage/Assign Fields by Record Type**.

2. Select **Solicitations** and the applicable type.

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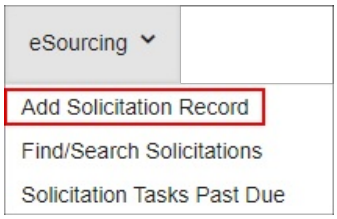


Note: If the type is new, the message appearing above - no fields assigned; this means all fields will show - displays. If, however, working with an existing type, fields may already be assigned.

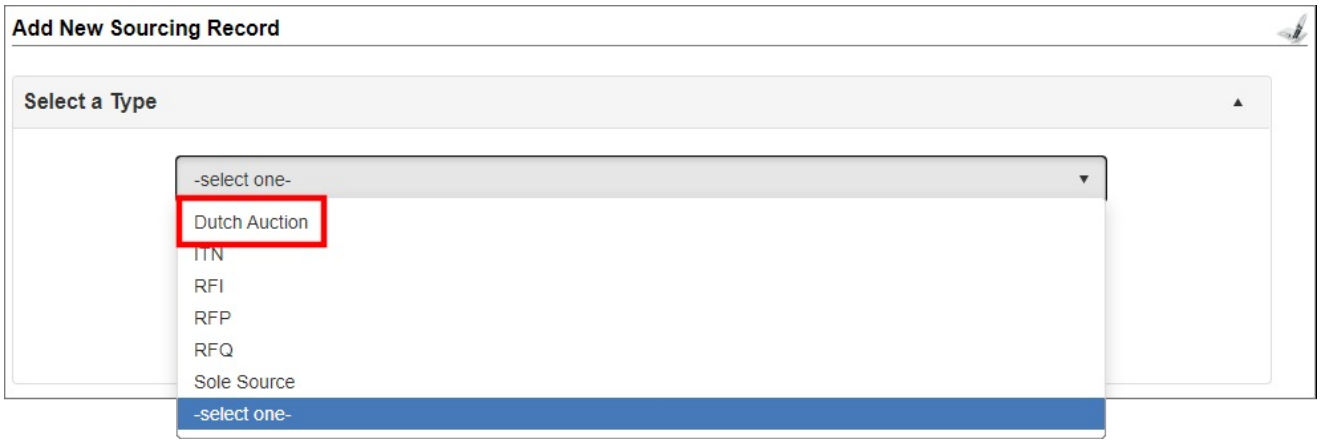
3. Add the needed fields per the Assign Fields by Contract Type wiki entry - found here.

Creating a Solicitation/eSourcing Record for Dutch Auction

1. Navigate to **eSourcing - Add Solicitation Record**.



2. The Add New Sourcing Record page displays. Select the applicable type designed as a Dutch auction.



3. Click **Continue**.

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4. Add the eSourcing record as usual but paying special attention to the area specifically for Dutch Auction Setting field group. It contains four (4) important fields.

A. **Starting Price**:

B. **Ending Price**:

C. **Price Decrease Amount**:

D. **Price Decrease Interval**:

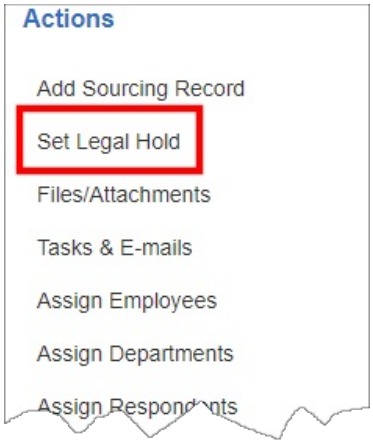
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Legal Hold

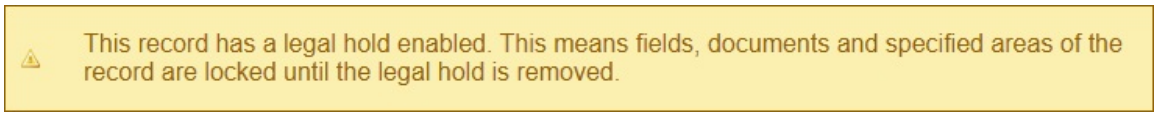
Legal Hold

Solicitation Details: Legal Hold

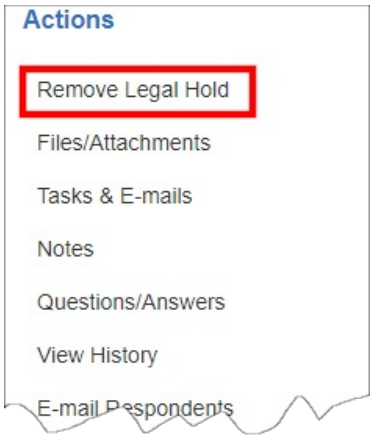
A System Admin User or any User with the **Setup: Manage Legal Holds** Permission assigned can manage a Solicitation Record's **Legal Hold** Status. To put a record on Legal Hold, click **Set Legal Hold** on the side menu, then confirm via the pop-up.



A banner, as seen below, appears along the top of the record. Fields are locked from editing and Attachments can no longer be added or deleted.



To remove the Legal Hold, click **Remove Legal Hold** on the side menu, then confirm via the pop-up.



To be able to attach new files while a record is on Legal Hold, there is a configuration setting for that. Navigate to:

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Manage/Setup > **Application Configuration** > **Config Settings**

Make sure **Security** is selected for the **Select Configuration Group** drop down. Go to **Group: Legal Hold** and adjust the **Disable File Uploads with Legal Hold** setting.

There is also a configuration setting regarding Document Authoring and Document Collaboration processes while on Legal Hold. (Document Collaboration being only relevant if using the Document Collaboration Add-On Module)

Select **Security** for **Select Configuration Group**. Modify **Document Collaboration with Legal Hold** as necessary.

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1. Solicitations Portal Introduction

Solicitations Portal Introduction

This functionality has been replaced by the Vendor/Client Gateway.

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2. Solicitations Portal Overview

Solicitations Portal Overview

This functionality has been replaced by the Vendor/Client Gateway.

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3. Navigating the Solicitations Portal

Navigating the Solicitations Portal

This functionality has been replaced by the Vendor/Client Gateway.

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1.1 Vendor/Client Gateway Overview

Vendor/Client Gateway Overview

Vendor/Client Gateway: Overview & Things to Consider

The **Vendor/Client Gateway** is an optional **add-on module** to your Contract Insight application. It is not part of the core application.

The Vendor/Client Gateway enables authenticated Vendor/Clients (external parties) the ability to submit new contract requests, renew contract requests, view existing contracts that are assigned to the Vendor/Client, and upload/view documents and notes to a contract record via the Internet.

Below are the steps that should be taken to setup/configure your organization's Vendor/Client Gateway as well as things to consider.

1. Things to Consider to Configure the Application Configuration Settings for the Gateway

Access:

- Should Vendors/Clients signed in to the Gateway be allowed to submit Contract Requests?
- If allowed to submit Contract Requests, then who, from your organization, should be alerted about newly submitted Contract Requests from the Gateway?
- Should Vendors/Clients be allowed to sign-up on the Vendor/Client Gateway, or should they contact an individual at your organization to sign-up?
- Should Vendors/Clients be allowed to view and add files/attachments on the Vendor/Client Gateway?
- Should Vendors/Client be allowed to view a list of Interested Parties/Respondents for Solicitations posted on the Gateway?

Content:

- What is your organization's standard Confidentiality Message that should be displayed on all pages of the Gateway?
- What should be the default/intro page content?
- What should be the default/intro page title?
- What should be the content included in the Header of the Gateway?
- What should be the Help page content if a Vendor/Client should have questions or need to contact your organization?
- What should be the Help page title?
- If a Vendor/Client is allowed to signup through the Gateway, what content would you like displayed for the bottom of the **New Account Confirmation** page?
- If a Vendor/Client is allowed to signup through the Gateway, what content would you like displayed for the top of the New Account Confirmation page?
- What should the Welcome Page content include?
- What should the Welcome Page title be?

Emails:

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- What should be the email body text for new account email notifications sent to Vendors/Clients?
- What should be the email title for new account email notifications sent to Vendors/Clients?
- What should be the email body end content for password reset email notifications sent to Vendors/Clients?
- What should be the email title for password reset email notifications sent to Vendors/Clients?

Additional Things to Consider:

- How large should the search grids page size be (by default)?
- What email address should receive help emails sent from the Vendor/Client Gateway?
- What email address should receive email alerts when Vendors/Clients signup through the Gateway?

2. Fields That Display on the Vendor/Client Gateway for the Following Screens

- Contracts & Committals Screen
- Company Contacts & Users Screen
- Contract & Committal Request Screen
- Solicitations & Procurements Screen

3. Managing Vendors/Clients on the Gateway

- Vendors/Clients Logging In
- Vendor/Client Forgotten Passwords

4. Managing Content Displayed on the Gateway for:

- Contracts & Committals (Files/Attachments, Notes)
- Contract & Committal Requests (Files/Attachments, Notes)
- Solicitations & Procurements (Files/Attachments, Notes)

Once the above items have been discussed and planned, it is then time to implement these into your Contract Insight Core Application in order to configure the Vendor/Client Gateway. Please view the additional sections and pages in the **Module: Vendor/Client Gateway** Manual of the Documentation Wiki.

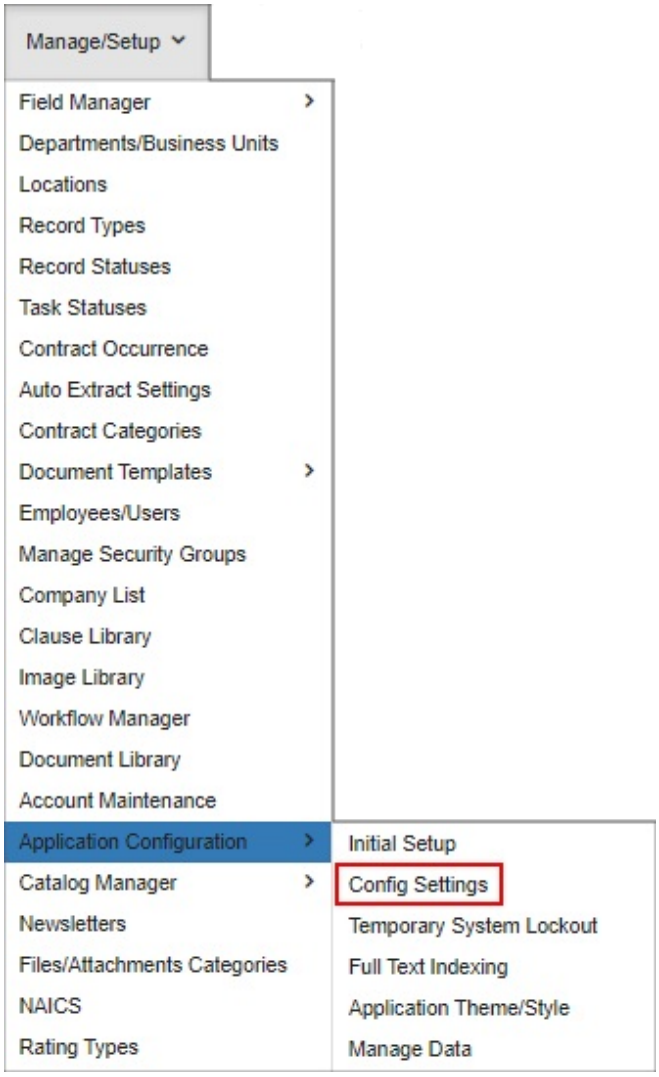
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1.2 Overview of Application Configuration: Gateway

Overview of Application Configuration: Gateway

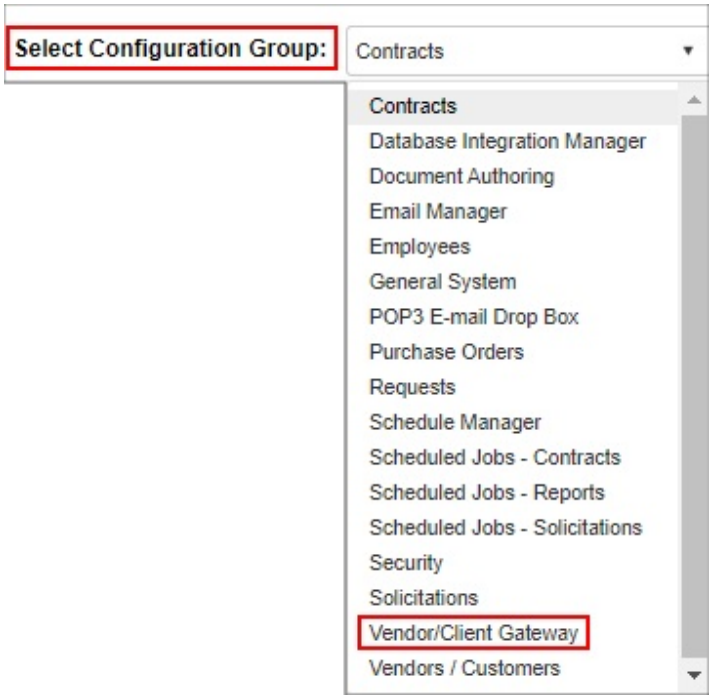
Application Configuration: Gateway

1. To manage the settings for the **Vendor/Client Gateway** optional add-on module, navigate to **Manage/Setup - Application Configuration - Config Settings**.



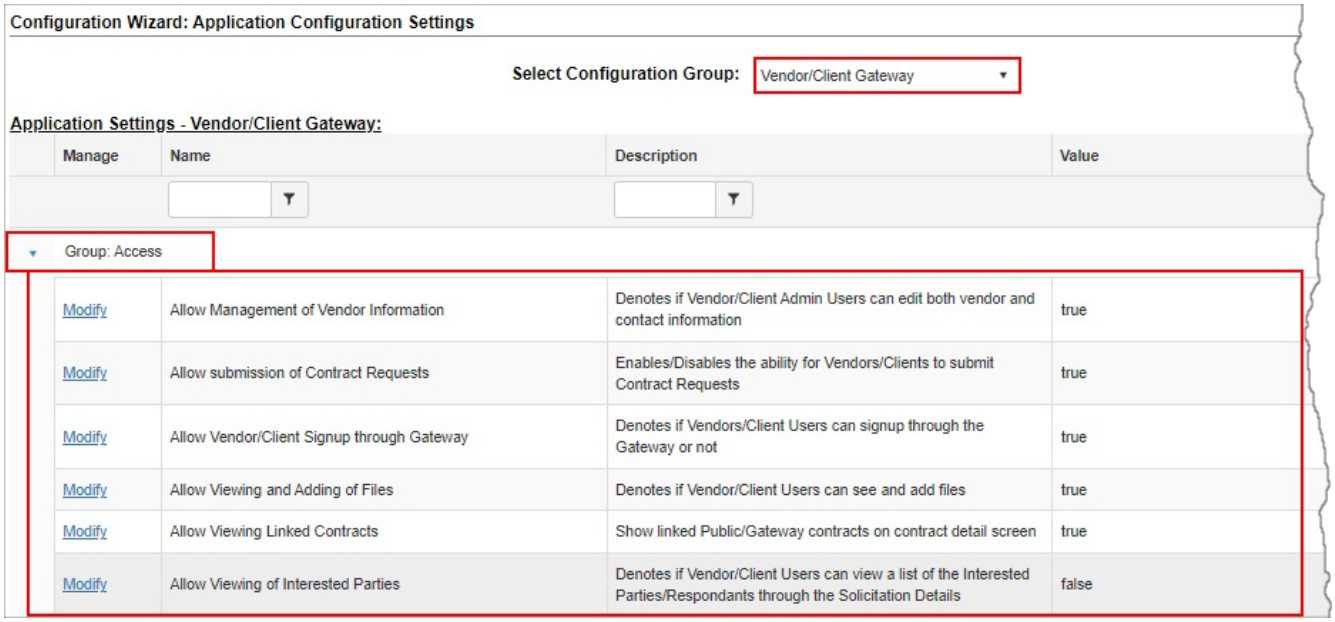
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2. The **Configuration Wizard: Application Configuration** screen displays. To manage the Gateway settings, click the **Configuration Group** drop-down menu and select the **Vendor/Client Gateway** Configuration Group.



The **Application Configuration: Gateway** list displays all configuration settings available to be set/customized for the Vendor/Client Gateway.

For illustrative purposes, the configuration sub-groups have been collapsed. To open a collapsed sub-group, click the



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Group: Content

Modify	Confidentiality Message	Confidentiality Message displayed at the bottom of every page on the Vendor/Client Gateway	**Rich Content...click 'Modify' to view.**
Modify	Default/Intro Page Content	Set the Content for the Gateway's Default/Intro Page	**Rich Content...click 'Modify' to view.**
Modify	Default/Intro Page Title	Set the Title for the Gateway's Default/Intro Page	Welcome to the Collaboration Portal
Modify	Duplicate Vendor Check Message	This message will be displayed when user try to create new vendor and entered information is already exist.	This company record already exists. Please see you...
Modify	Gateway Login Terms and Conditions	This content will show upon clicking the Terms and Conditions link while login through Gateway.	**Rich Content...click 'Modify' to view.**
Modify	Header Content	Set the content of the header for the Vendor/Client Gateway	**Rich Content...click 'Modify' to view.**
Modify	Help Page Content	Set the Content for the Gateway's Help Page	**Rich Content...click 'Modify' to view.**
Modify	Help Page Title	Set the Title for the Gateway's Help Page	Collaboration Portal Help & Support
Modify	New Account Confirmation Bottom Content	Set the Content for the Bottom of the New Account Confirmation Page	**Rich Content...click 'Modify' to view.**

Group: Emails

Modify	New Account Emails Body Intro	Set the Body introduction to be used with new account e-mail notifications.	**Rich Content...click 'Modify' to view.**
Modify	New Account Emails Title	Set the Title to be used with new account e-mail notifications.	New Vendor/Client Account Created
Modify	Password Reset Emails Body End	Set the Body ending to be used with Password Reset e-mail notifications	**Rich Content...click 'Modify' to view.**
Modify	Password Reset Emails Title	Set the Title/Subject to be used with Password Reset e-mail notifications.	Contract Insight Vendor/Client Gateway Password Re...

Group: General

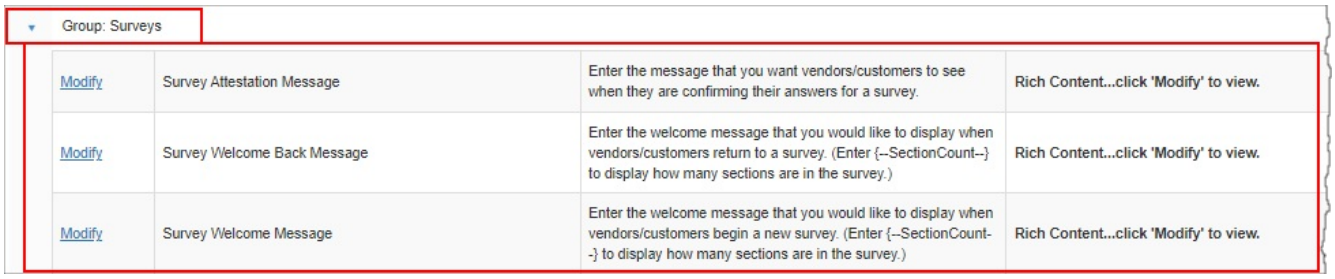
Modify	Allow vendor document upload on account creation.	Allow vendor document upload on account creation.	true
Modify	External Web Address for Help Content	Set the URL Web Address for help content on the Vendor/Client Gateway	http://cobblestonesystems.com/contactus.aspx
Modify	Gateway Website Address	Stores the Web Address of the Vendor/Client Gateway (set & maintained by system)	https://training.cobblestonesystems.com/Enterprise...
Modify	Search Grids Page Size	Set the number of results to show on each page in the search grids	25
Modify	Show/Hide Create Account Captcha	Show or Hide Captcha on Create Account Screen	false
Modify	Show/Hide Login Captcha	Show or Hide Captcha on Login Screen	false

Group: Notification

Modify	Help Email Notifications Sent To	Email addresse(s) (comma separated ',') to receive help emails from Vendor/Client Gateway	support@CobbleStoneSystems.com
Modify	Vendor/Client Signup Email Notification	Email addresse(s) (comma separated ',') to be notified on Vendor/Client Signups	

1

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The Application Configuration: Gateway settings will be further described in the following pages:

Managing Access to the Gateway

Managing Content on the Gateway

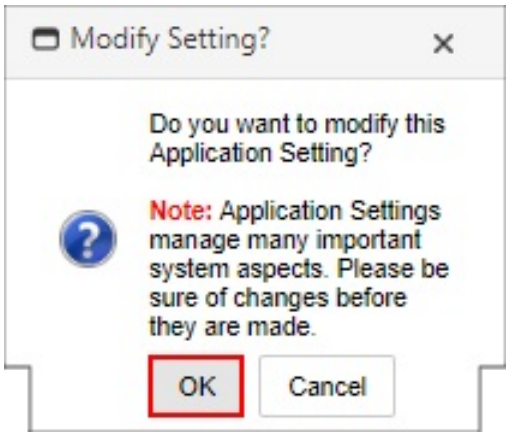
Managing Emails on the Gateway

Additional Gateway Configuration Settings

For Application Configuration Settings that have a value of Rich Content...click 'Modify' to view

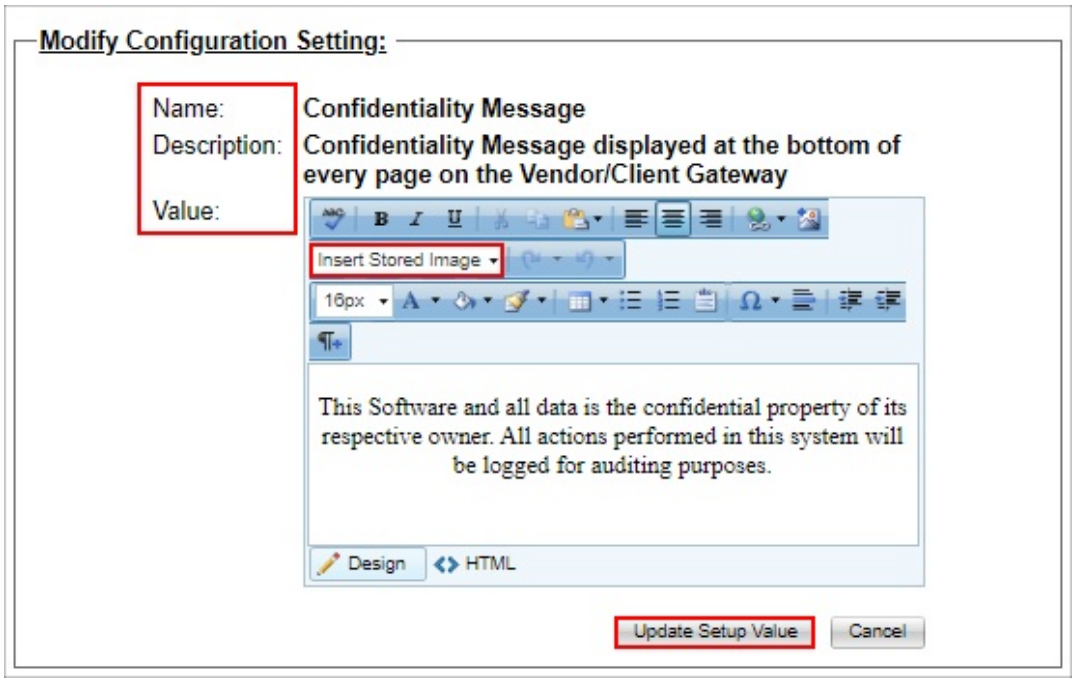
Click **Modify** for the setting line item, click **OK** to confirm, and proceed with updating the Configuration Setting.





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The **Modify Configuration Setting** window opens at the top of the screen displaying a Word-like HTML text editor.



The Modify Configuration Setting area contains the following:

- **Name**: Name of the configuration setting being modified
- **Description**: Gives a brief overview of what the configuration setting does/affects
- **Value**: What will be displayed for the area/setting being modified

In the Word-like HTML text editor, format and enter text similarly to any other text editor.

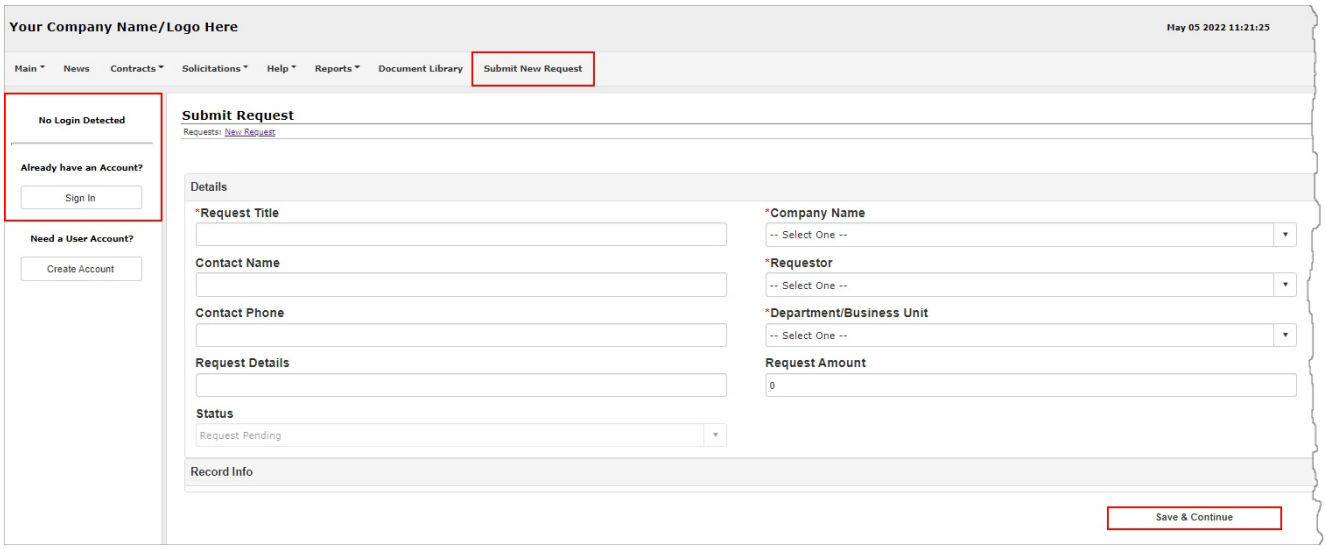
Insert an image to be displayed in the content of the field's setting by clicking **Insert Stored Image**.

Note: For information about how to upload images to be used in the Application Configuration settings, see the "Image Library" Wiki page.

Public Request Submission

If permitted, users who have not logged into the portal may be able to enter Request Records.

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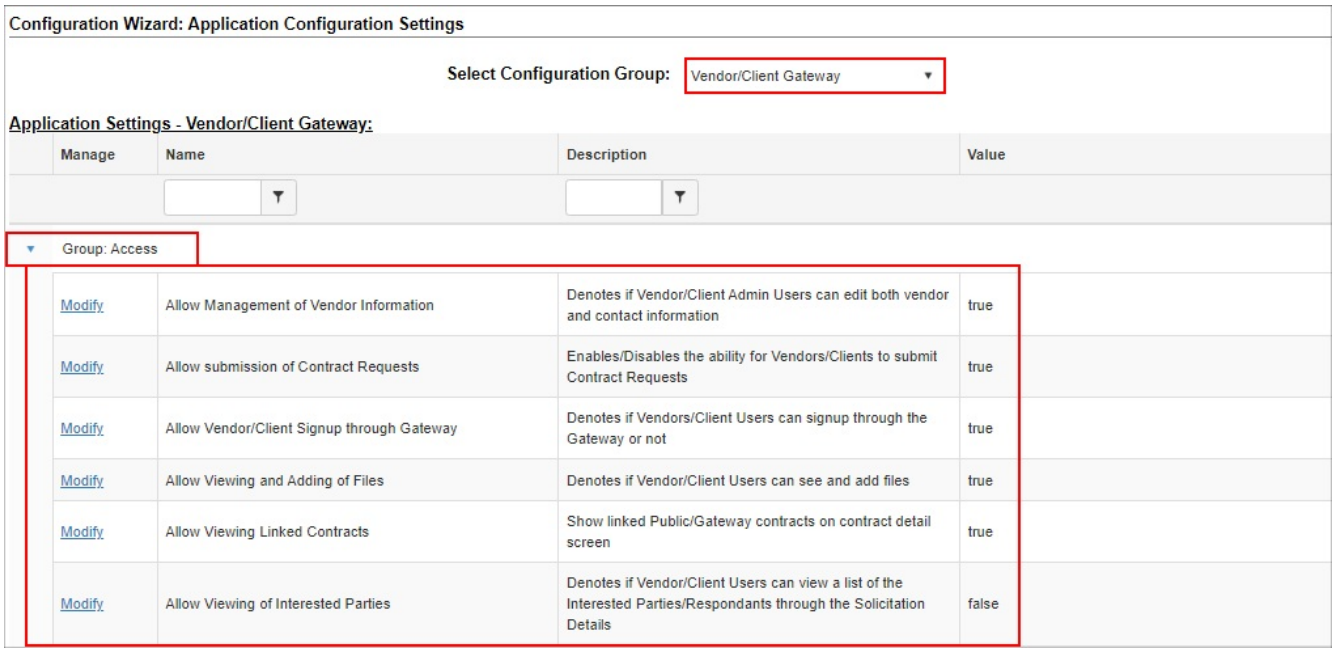
1.3 Managing Access to the Gateway

Managing Access to the Gateway

Vendor/Client Gateway: Managing Access to the Gateway

Contract Insight provides a number of configuration items for regulating access to and within the **Vendor/Client Gateway**.

Note: All settings affect the Vendor/Client Gateway globally for all Vendors/Customers, both new and existing.



Allow Management of Vendor Information: This configuration setting determines if Vendor/Client Admin Users can edit both vendor and contact information.

True: Vendors/Client Admin Users are allowed to edit both vendor and contact information on the Gateway
False: Vendors/Clients Admin Users are not allowed to edit vendor and contact information on the Gateway

Note: If this Configuration setting is set to True, the Vendor/Client Admin Users will be able to edit both vendor and contact information on the Gateway.

Allow Submissions of Contract Requests: This configuration setting determines if Vendors/Clients logged in to the Vendor/Client Gateway can submit Contract Requests.

True: Vendors/Clients are allowed to submit Contract Requests through the Gateway
False: Vendors/Clients are not allowed to submit Contract Requests through the Gateway

Note: If this Configuration setting is set to True, at least one User Group/Role must have **Default to Gateway** set to Yes. See the Employee Groups & Roles Wiki page for more detailed information.

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Allow Vendor/Client Signup Through Gateway: This configuration setting determines whether Vendors/Clients new to the Gateway can signup through the Gateway or not.

True: New Vendors/Clients are allowed to sign up through the Gateway
False: New Vendors/Clients are not allowed to sign up through the Gateway

Note: If this Configuration setting is set to False, please be sure to put instructions on the "Help" page for how a new Vendor/Client can signup to access the Gateway. See the Managing Content on the Gateway Wiki page for information about adding content to the **Help** page.

Allow Viewing and Adding of Files: This configuration setting determines whether a Vendor/Client logged in to the Vendor/Client Gateway can open and view attached files/attachments for Contract/Committal, Contract Request, and Solicitation/Procurement attachments that have been marked upon attaching as **Gateway**. See the Contract Attachments on the Vendor/Client Gateway Wiki page for more information.

True: Vendors/Clients are able to see and add files through the Gateway
False: Vendors/Clients are not able to see and add files through the Gateway

Allow Viewing of Interested Parties: This configuration setting denotes whether a Vendor/Client logged in to the Gateway can view a list of the **Interested Parties/Respondents** for a Solicitation.

True: Vendors/Clients are able to see the list of Interested Parties/Respondents
False: Vendors/Clients are not able to see the list of Interested Parties/Respondents

Note: This setting only needs to be configured if your organization has purchased the Optional Add-On Module for Solicitation/Procurement Management.

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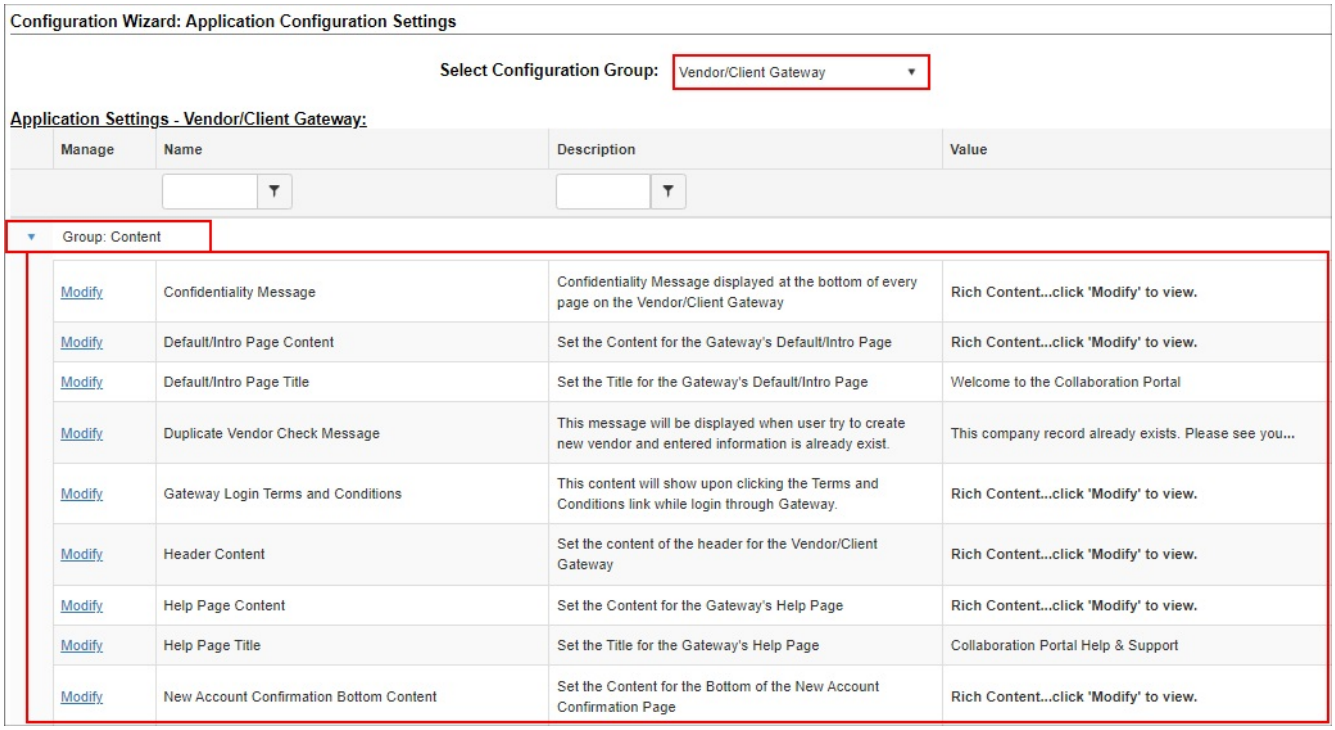
1.4 Managing Content on the Gateway

Managing Content on the Gateway

Vendor/Client Gateway: Managing Content

Contract Insight allows configuration of content that displays within the **Vendor/Client Gateway**.

Note: All settings will affect the Vendor/Client Gateway globally for all Vendors/Customers (new and active).



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Confidentiality Message: This configuration setting allows Application Administrators to specify the Confidentiality Message displayed at the bottom of every page on the Vendor/Client Gateway.

Default/Intro Page Content: This configuration setting allows Application Administrators to specify the content displayed on the Gateway's Default/Intro page.

Default/Intro Page Title: This configuration setting allows Application Administrators to specify the title of the Gateway's Default/Intro page.

Header Content: This configuration setting allows Application Administrators to specify the Header content for the Gateway.

Help Page Content: This configuration setting allows Application Administrators to specify the Help page content for the Gateway.

Help Page Title: This configuration setting allows Application Administrators to specify the Help page title for the Gateway's Help page.

New Account Confirmation Bottom Content: This configuration setting allows Application Administrators to specify the content to be displayed at the bottom of the New Account Confirmation page.

New Account Confirmation Top Content: This configuration setting allows Application Administrators to specify the content to be displayed at the top of the New Account Confirmation page.

Welcome Page Content: This configuration setting allows Application Administrators to specify the content to be displayed on the Welcome page when Vendors/Clients log in to the Gateway.

Welcome Page Title: This configuration setting allows Application Administrators to specify the title of the Welcome page when Vendors/Clients log in to the Gateway.

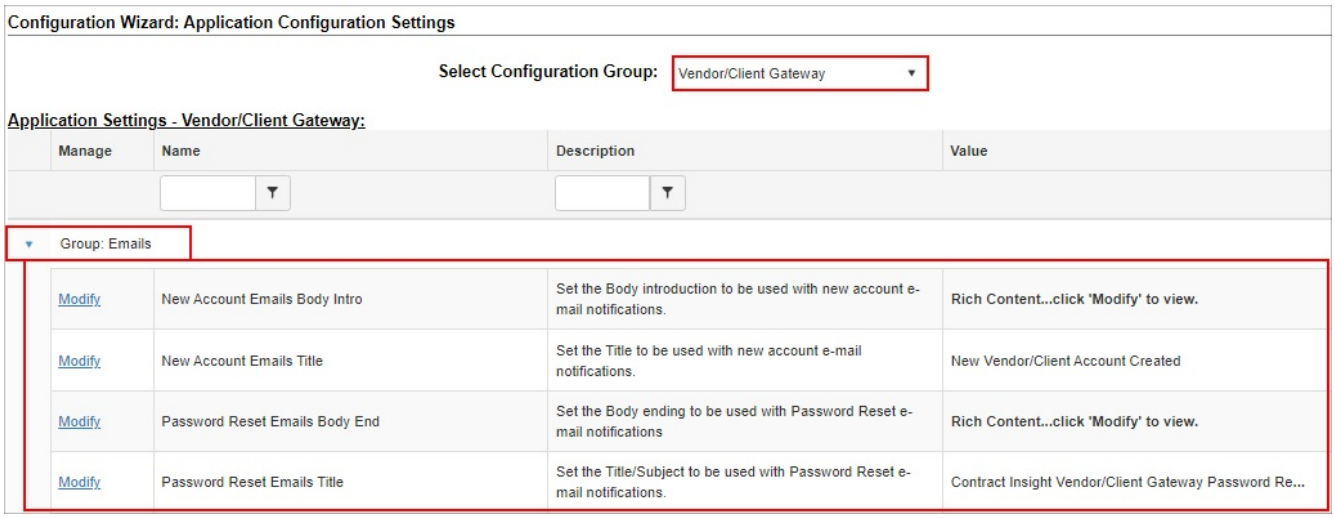
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1.5 Managing Emails on the Gateway

Managing Emails on the Gateway

Vendor/Client Gateway: Managing Email

Much like the other areas of the **Vendor/Client Gateway**, Contract Insight offers configuration for email generated regarding the Gateway.



New Account Emails Body Intro: This setting allows Application Administrators to set the body introduction to be used with new account e-mail notifications sent to the new Vendor/Client.

New Account Emails Title: This setting allows Application Administrators to set the title of the new account email notification sent to the new Vendor/Client.

Password Reset Emails Body: This setting allows Application Administrators to set the body ending of the password reset email sent to Vendors/Clients that reset their passwords.

Password Reset Emails Title: This setting allows Application Administrators to set the title of the password reset email sent to Vendors/Clients that reset their passwords.

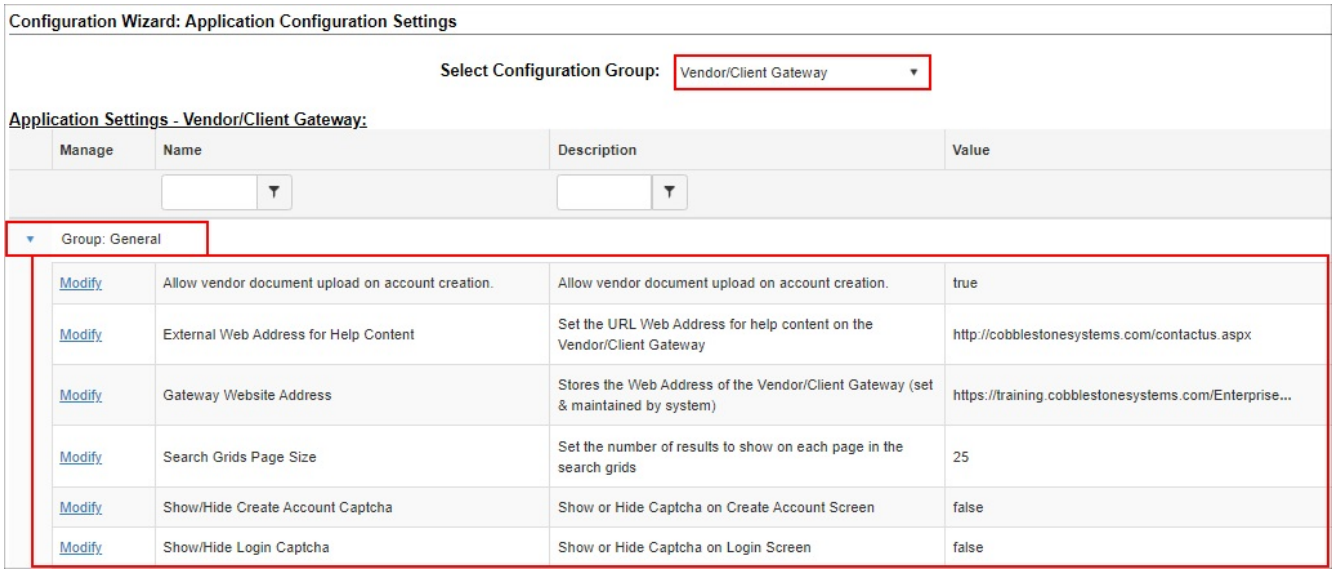
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1.6 Additional Gateway Configuration Settings

Additional Gateway Configuration Settings

Vendor/Client Gateway: Additional Configuration Settings

Finally, Contract Insight offers configuration settings for a variety of other aspects of the **Vendor/Client Gateway**.



External Web Address for Help Content: Declares the URL Web Address for help content on the Vendor/Client Gateway.

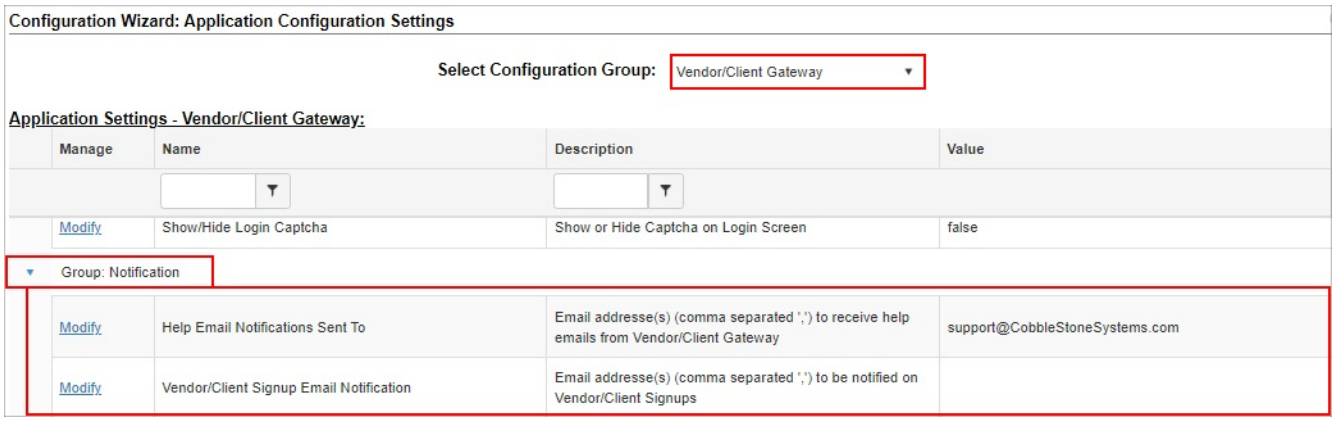
Gateway Website Address: Stores the Web Address of the Vendor/Client Gateway (this is set and maintained by the system and should not be changed).

Search Grids Page Size: Allows Application Administrators to set the default number of results to be displayed on each page in the search grids.

Show/Hide Create Account Captcha: Allows application administrators to specify if the builtin captcha is used on the signup page.

Show/Hide Login Captcha: Allows application administrators to specify if the builtin captcha is used on the login page.

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Help Email Notifications Sent To: Allows Application Administrators to specify an email address(s) to receive Help emails submitted from the Vendor/Client Gateway.

Vendor/Client Signup Email Notification: Allows Application Administrators to specify an email address(es) to be notified on Vendor/Client signups to the Gateway.

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1.7 Manage Main Menu Vendor Client Gateway

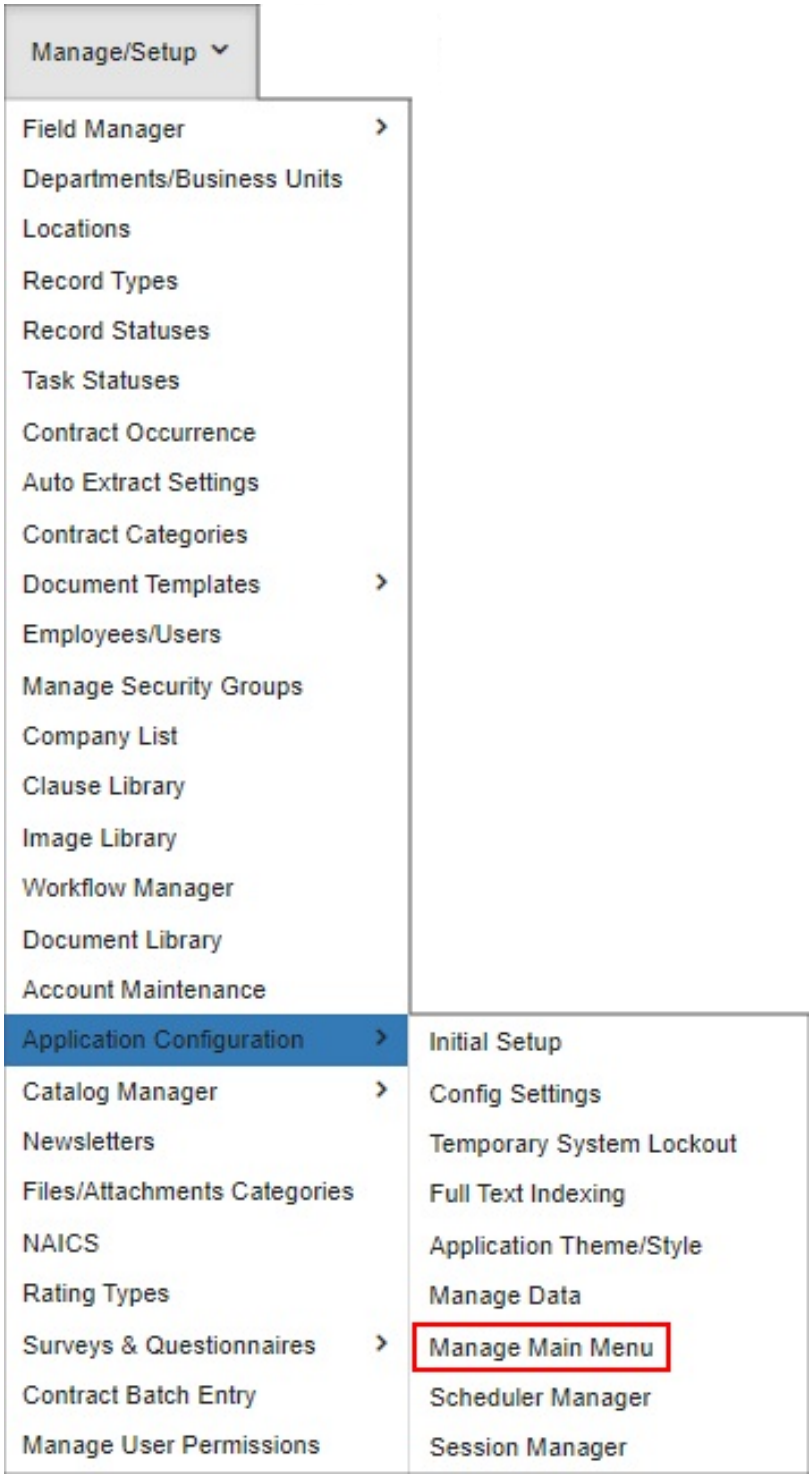
Manage Main Menu: Vendor/Client Gateway

Vendor/Client Gateway: Manage Main Menu

Contract Insight allows authorized and licensed users with Administrative permissions to customize the top navigation menu to display icons as well as alter the menu names, accessibility, and location of the menus.

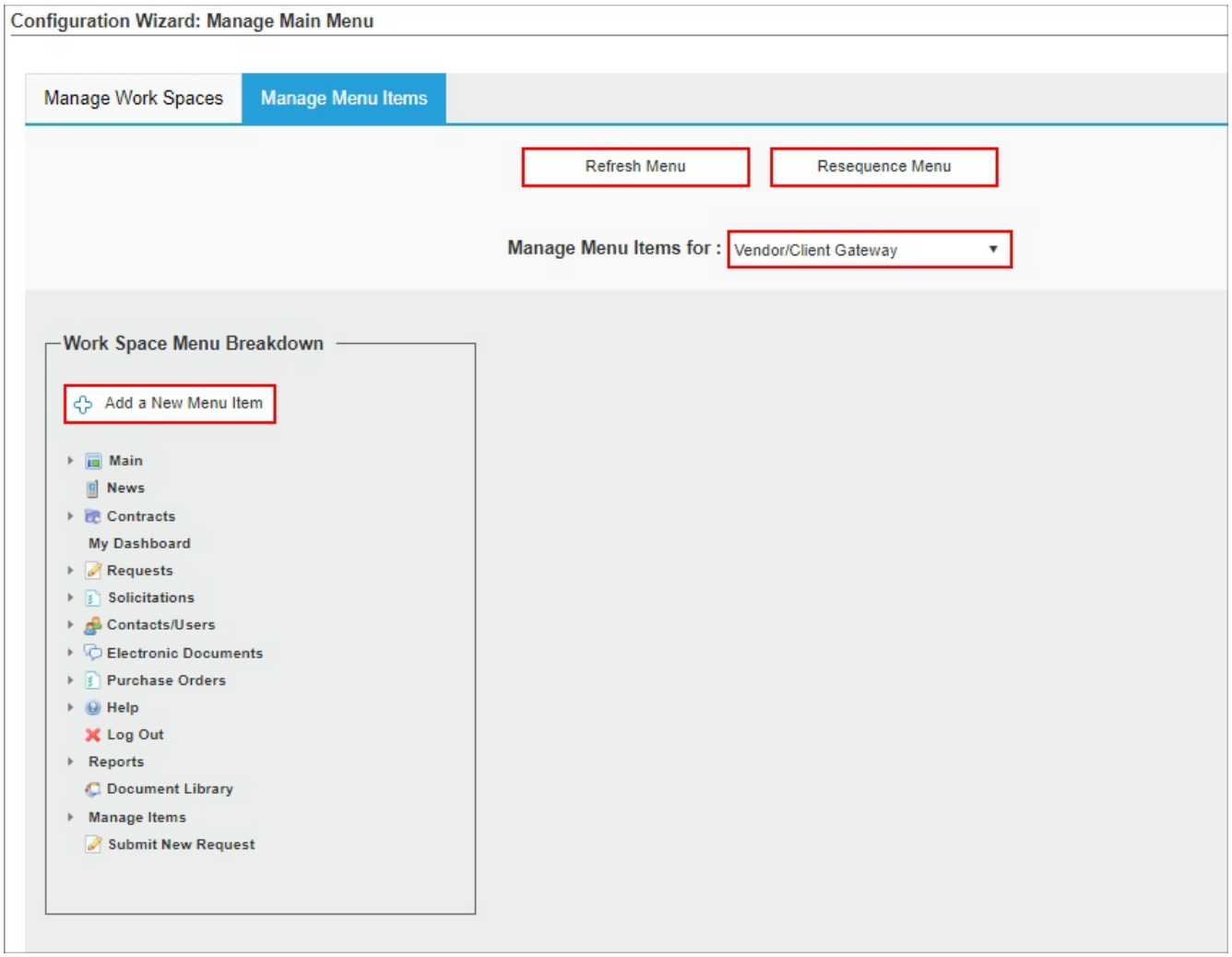
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To customize the menus of the top navigation menu of the Gateway, go to **Manage/Setup - Application Configuration - Manage Main Menu**



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The **Configuration Wizard: Manage Main Menu** screen displays. From the drop-down menu, select Vendor/Client Gateway.



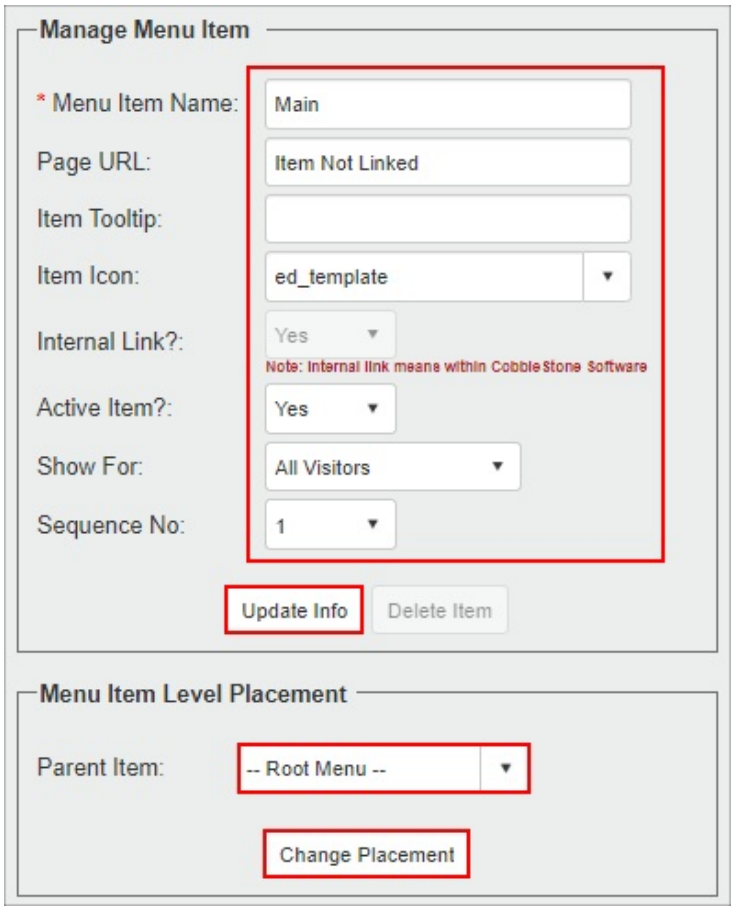
There are four main sections of the screen.

1. **Main Menu Breakdown**

- Select the arrows to the left of the menu title to display a list of sub-menus that are contained in that menu.
- Select the menu or sub-menu name to show the menu item's details in the **Manage Menu Item Info** section of the screen.
- Add new menu items by clicking **Add Menu Item**.

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2. **Manage Menu Item Info**



Item Text: The menu's name as it will appear in the navigation menu.

Page URL: Where the page is located (if this is a system page, the 'Page URL' is not customizable).

Item Tooltip: The Item Tooltip pop-up displays the description of the menu item.

Item Icon: Select an icon to be displayed to the left of the menu name in the navigation menu (optional).

Active Item?: Determines whether the menu item appears in the menu.

Show For: This Determines whether the menu item displays for **All Visitors** or **Logged In Visitors**.

Sequence No.: The order in which the menus appear in each grouping.

Once you have made any/all changes, click **Update Info** to save all changes made.

3. **Manage Menu Item Placement**

Parent Item: Shows the menu item directly above the selected item in the main menu hierarchy (i.e. **My Dashboards** is contained in the **Home** main menu item).

All menu items can have their parent item customized/changed to any other menu item in the main menu hierarchy by selecting the name in the drop-down box and clicking **Change Placement**.

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When a menu item has its parent item modified, its sequence number is automatically updated to the last number in the sequence list for the new parent item.

4. Upload New Icon

This area allows users to upload personalized icons to be selected in the **Item Icon** drop-down in the **Manage Menu Item Info** section of the page. (see the Image Library Wiki page for more information)

Note: Uploaded icons should be 16 pixels x 16 pixels (the default size of icons).

5. Refresh Menu/Re-sequence Menu

Once any changes have been made to the menu, be sure to click **Refresh Menu** at the top of the **Manage Main Menu** screen.

To re-sequence the order in which the menus display, click **Re-sequence Menu** at the top of the **Manage Main Menu** screen.

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1.8 Manage Gateway File Categories

Manage Gateway File Categories

File Categories

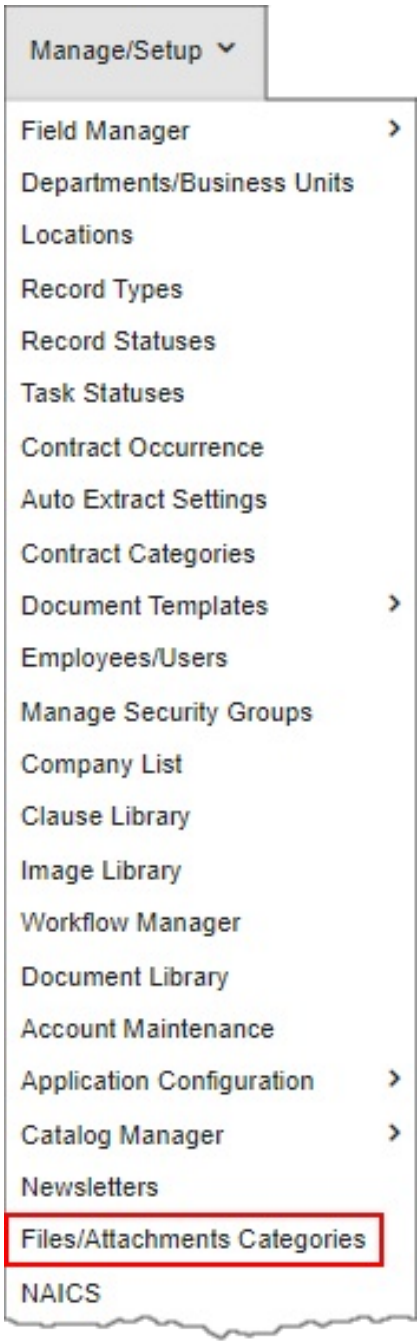
With CobbleStone Contract Insight Enterprise Edition and the optional Vendor/Client Gateway, system administrators can limit the file categories available for selection by users via the Gateway.

Note: Images below may not reflect the configuration in your system and are for illustrative purposes only.

Viewing Defined File Categories

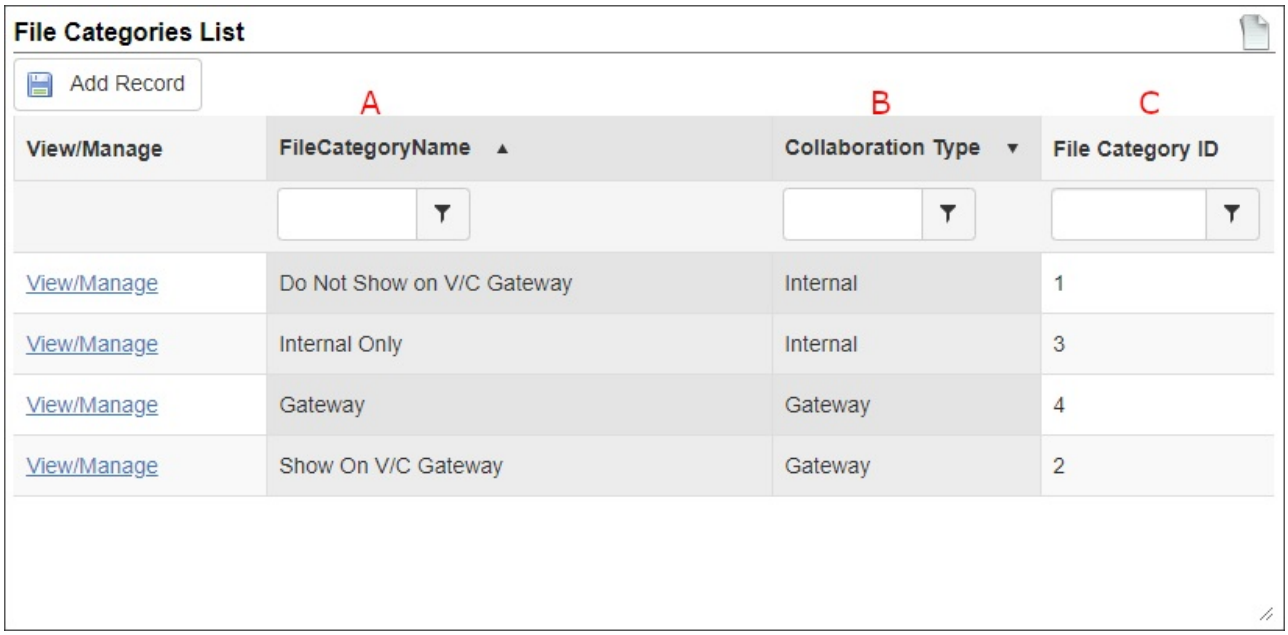
1. Via the main menu, navigate to **Manage/Setup - File Attachments/Categories**.

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2. The **File Categories List** displays and offers numerous pieces of information regarding each category. To modify the information displayed, on the side menu, click **Manage Columns** (not pictured).

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A. **File Category Name:** The name given to the category

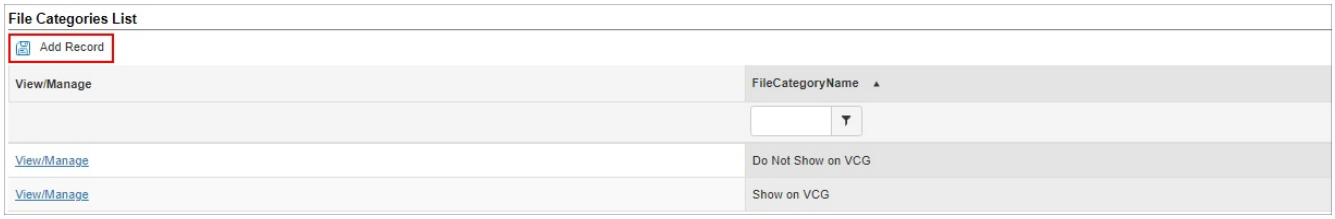
B. **Collaboration Type:** Defined as Internal for use in CobbleStone only or as Gateway for use in CobbleStone and in the gateway

C. **File Category ID:** The ID applied by CobbleStone to the line item

Adding File Categories

System administrators may add new file categories for internal or gateway use at any time.

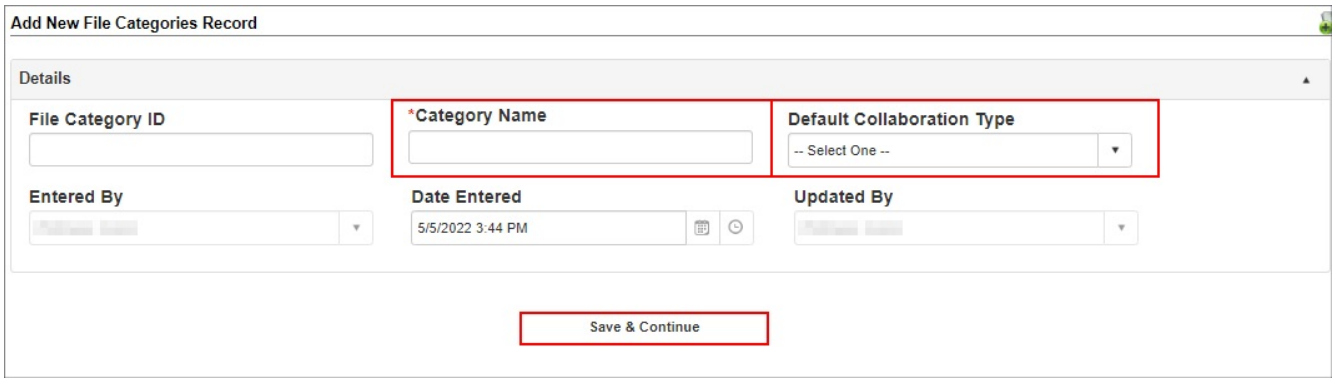
1. Click Add Record.



2. Enter the new Category Name.

3. Select the Collaboration Type, either Internal or Gateway.

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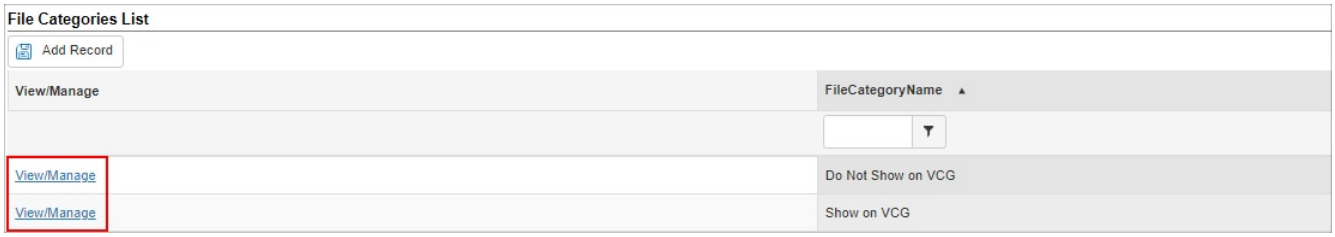
4. Click **Save & Continue** to commit the new category to the system.

5. The File Category List page displays.

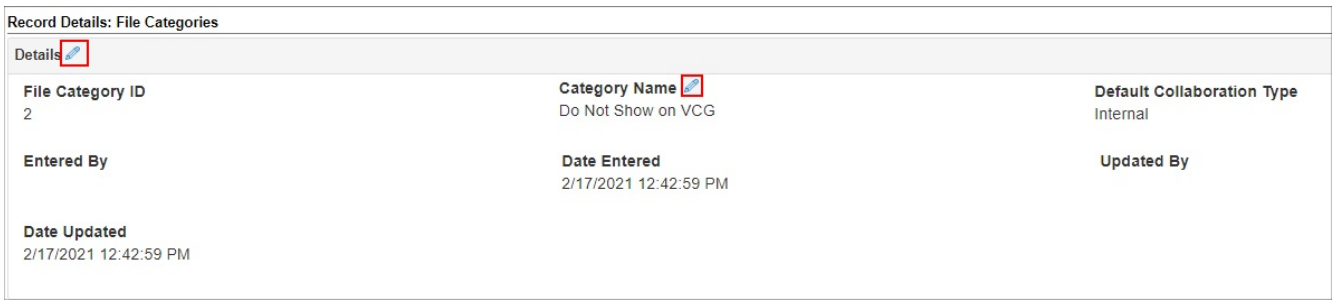
Editing File Categories

System administrators may also manage or delete defined categories.

1. For the desired line item, click **View/Edit**.



2. The **Record Details: File Categories** page displays. Edit the Category Name and/or the Collaboration Type by clicking the pencil icon (that appears when the field is hovered over. Alternatively, click the pencil icon next to Details to edit multiple fields at once.



3. A pop-up window appears. Make any changes necessary.

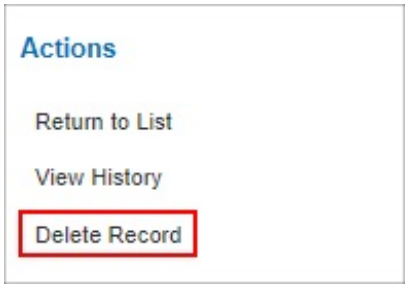
4. Save any changes made.

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Deleting a Category Type

1. As above, click **View/Manage** for the desired line item.

2. The **Record Details: File Categories** page displays. On the side menu, click **Delete**.

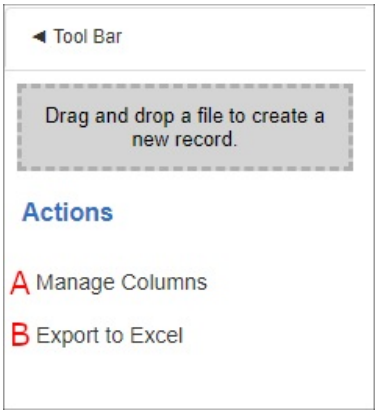


3. The record is removed and the category list displays.

Note: Before deleting a file category, ensure files are not using the category in question. If any files are using a deleted category, those files have their categories removed (but the file remains).

File Categories List Side Menu Options

The side menu of the File Categories List offers two options:



A. **Manage Columns:** Add or remove columns displayed on the File Categories List page

B. **Export to Excel:** Export the displayed columns to an Excel file

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1.9 Multi-Factor Authentication

Multi-Factor Authentication

Master Reference Data Management: Contract Occurrence

System administrators can optionally have users of the Vendor/Client Gateway register and login with multi-factor authentication (MFA).

Multi-Factor Settings

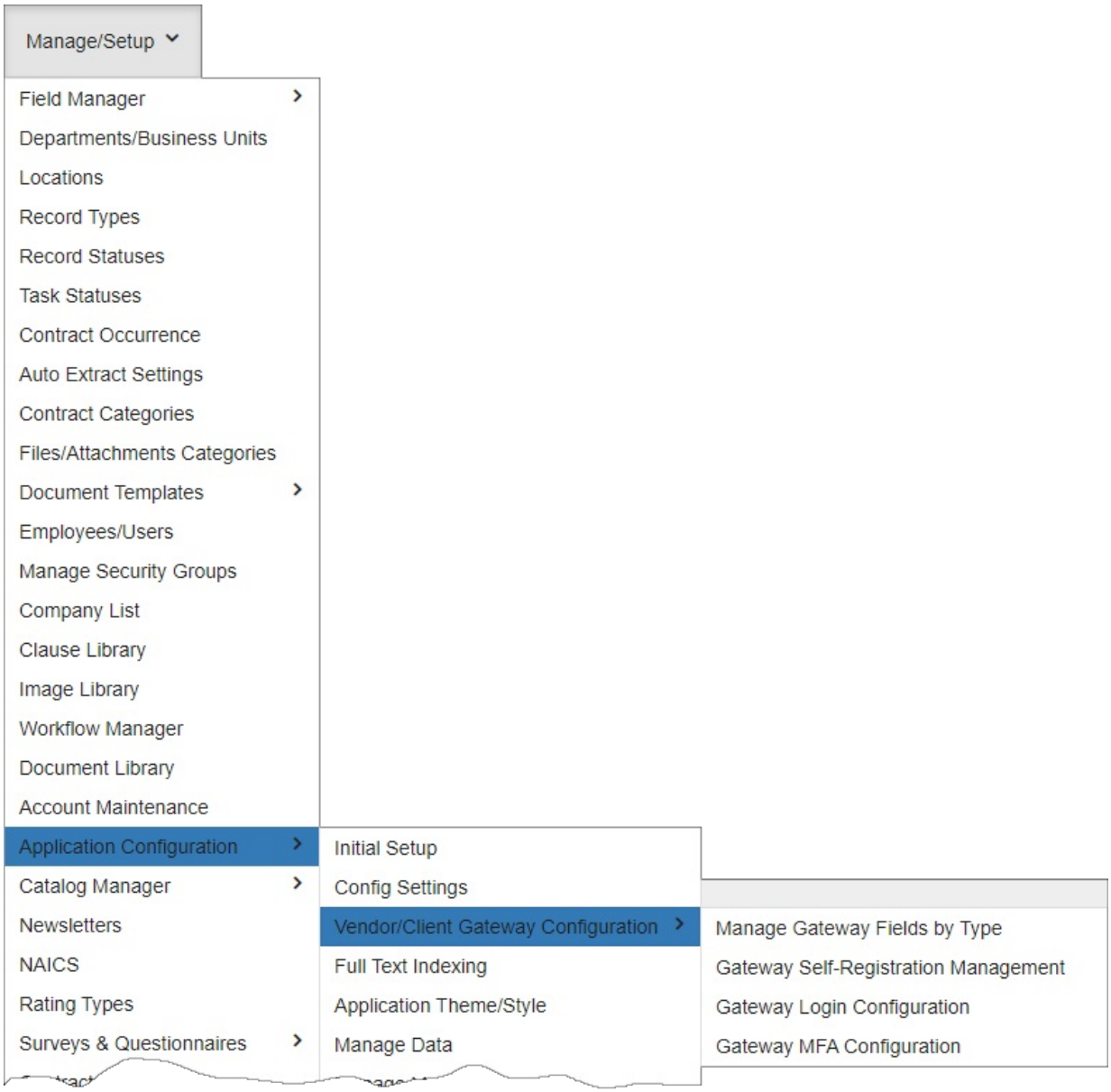
To have this option, the user must first have Vendor Client Gateway Multifactor Authentication set to True.

Click **Manage/Setup**

Click **Application Configuration**

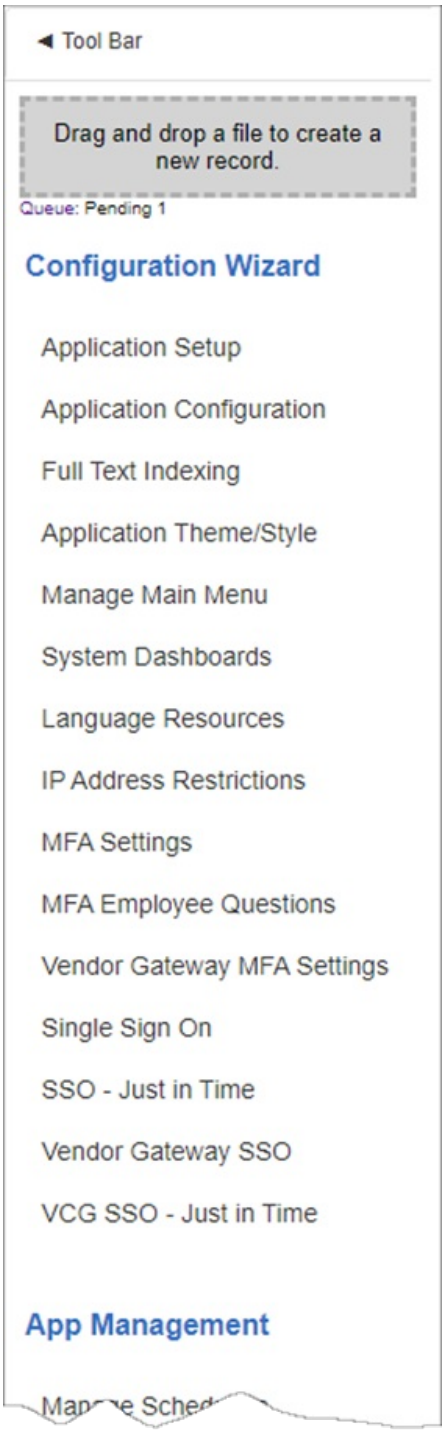
Click **Initial Setup**

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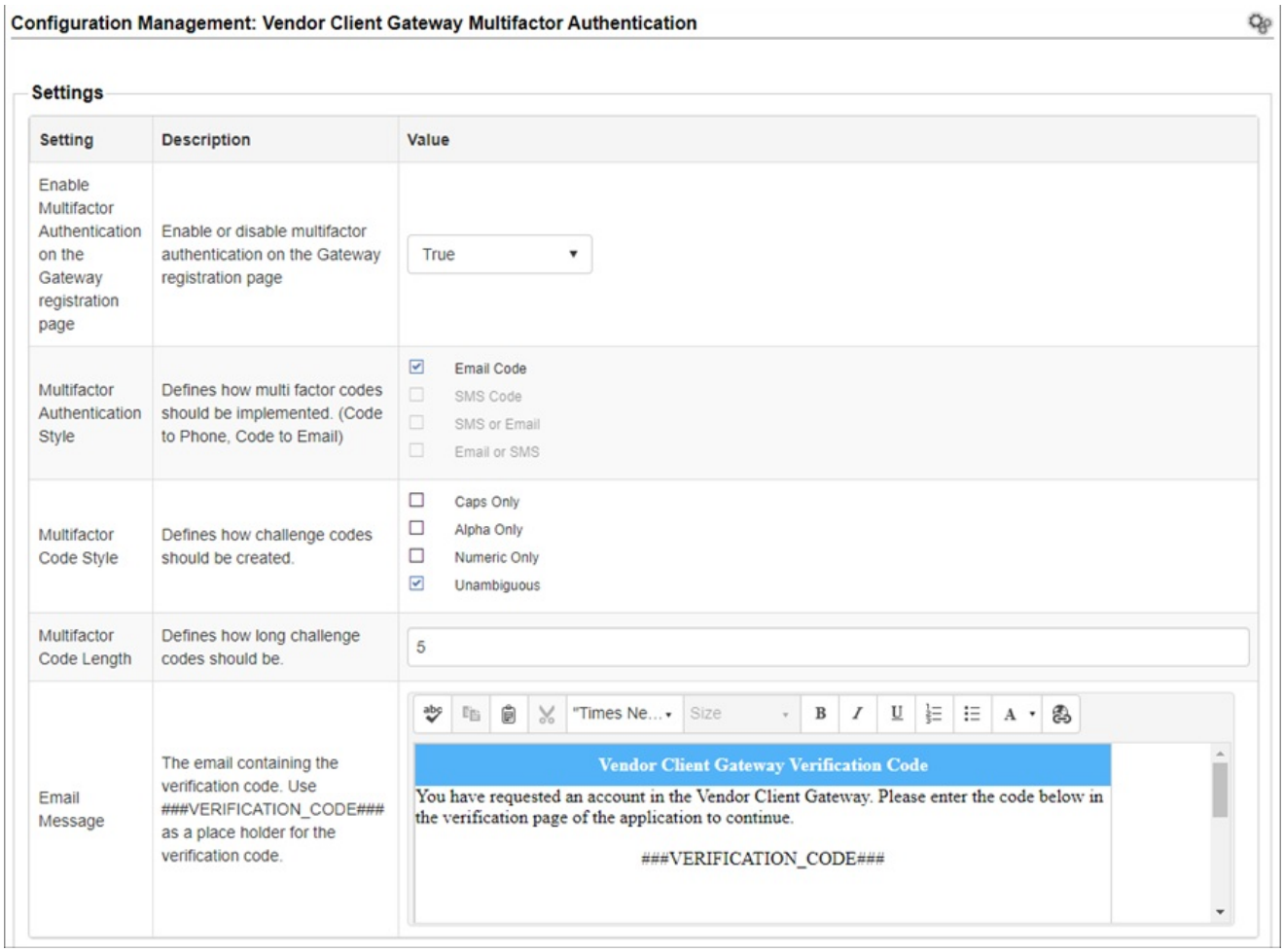
On the left sidebar labeled Configuration Wizard, click **Vendor Gateway MFA Settings**

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The top Setting (Enable Multifactor Authentication on the Gateway registration page) must be changed to **True**.

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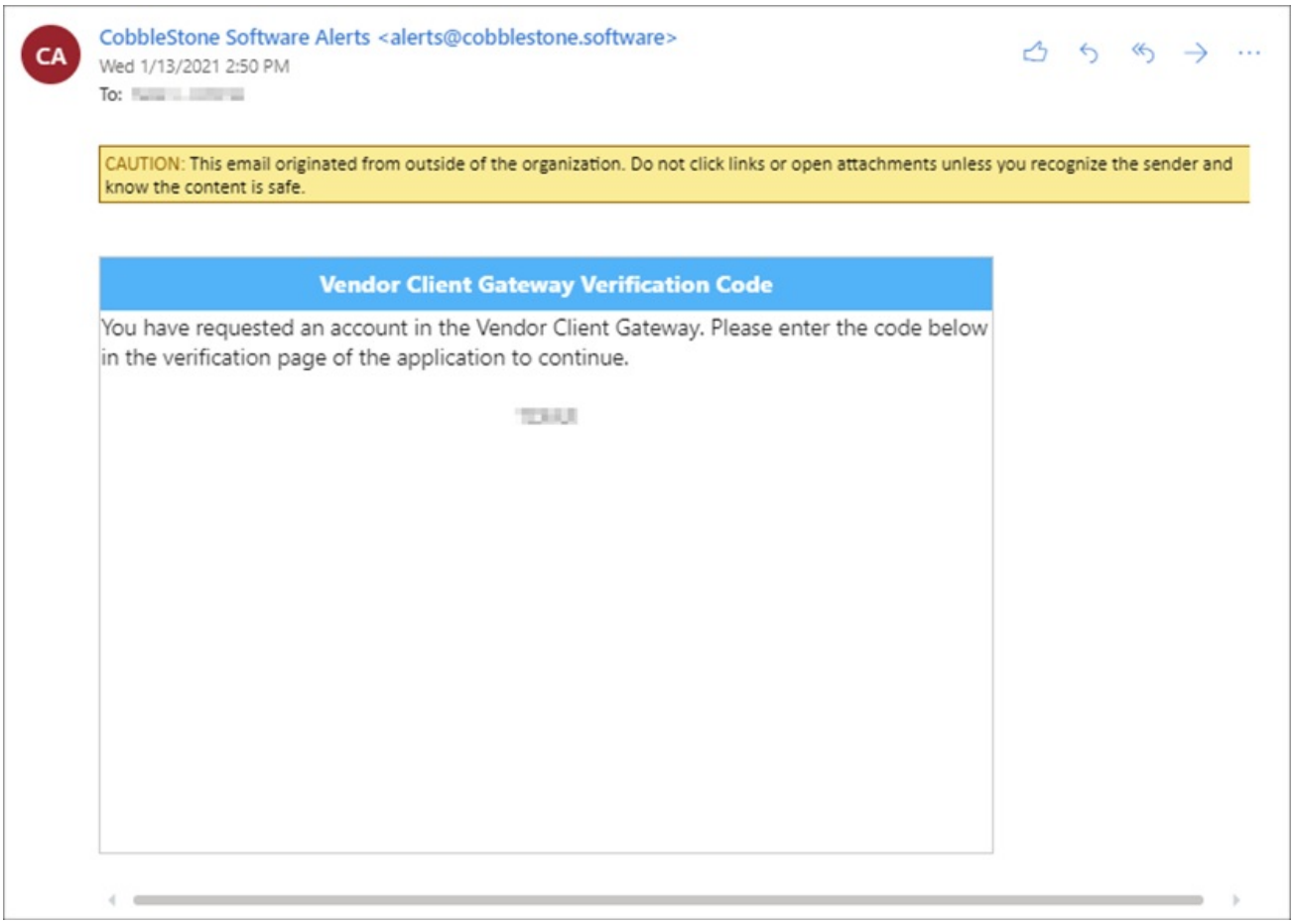


Multi-Factor Authentication Style: E-Mail

Note: If settings are not configured appropriately, a message will display, reading “The verification code could not be sent to your email address.”.

Note: Make sure you have *Code in email message* as a place holder for the verification code

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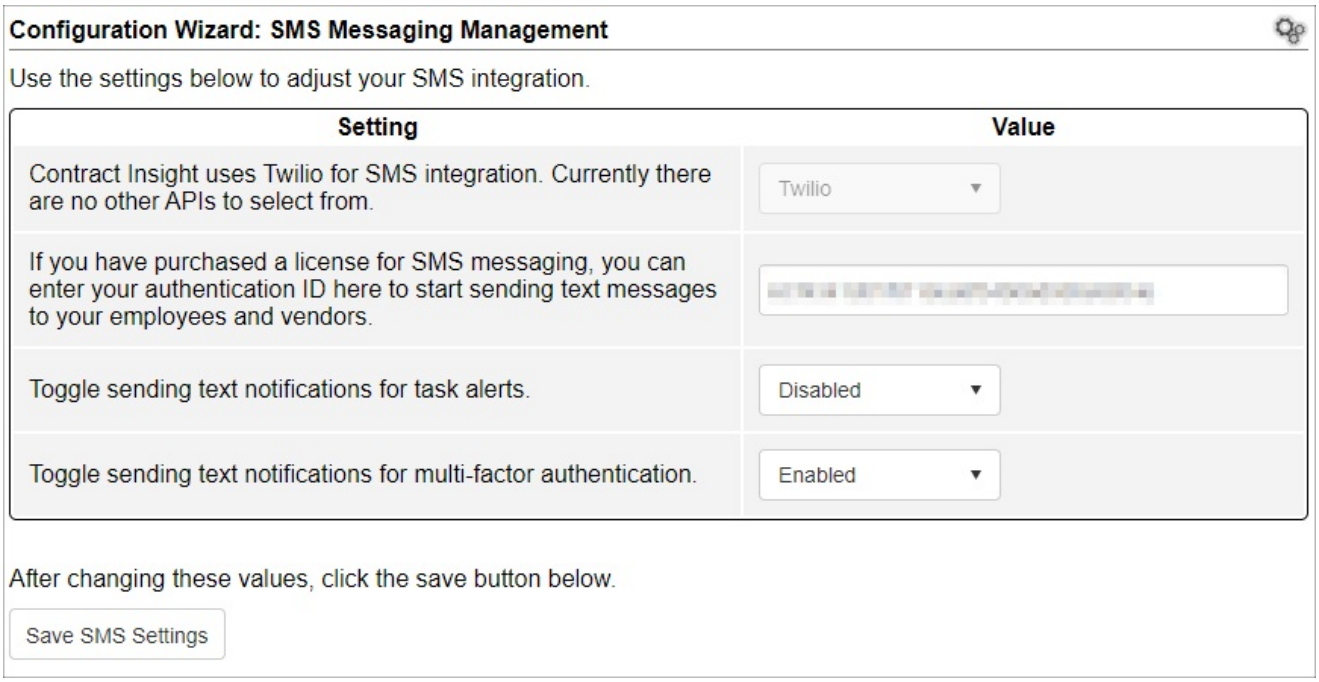
Multi-Factor Authentication Style: SMS Text Message

To prepare for SMS authentication, an admin must first configure SMS integration.

1. Navigate to Manage/Setup - Application Configuration - SMS Messaging Manager

2. The **SMS Messaging Manager** page displays

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Note: You must have purchased a license for SMS Messaging.

4. Set **toggle sending text notifications for multi-factor authentication** to Enabled

5. When done with all settings, click **save SMS Settings**.

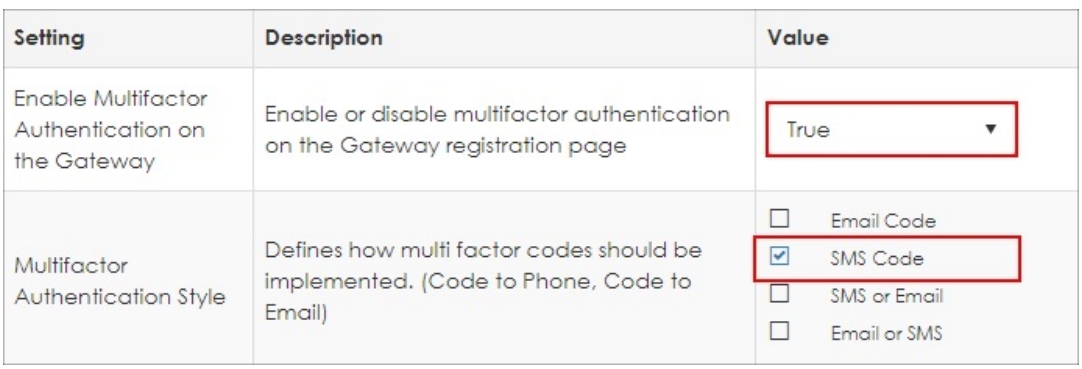
Now that SMS has been established in the SMS configuration page, a System Administrator can set up Gateway Configuration Page for SMS use.

1. Navigate to **Manage/Setup - Application Configuration - Config Settings**

2. On the side menu, click **Vendor gateway MFA Settings**

3. Make sure the **Enable Multifactor Authentication on the Gateway registration page** is set to True

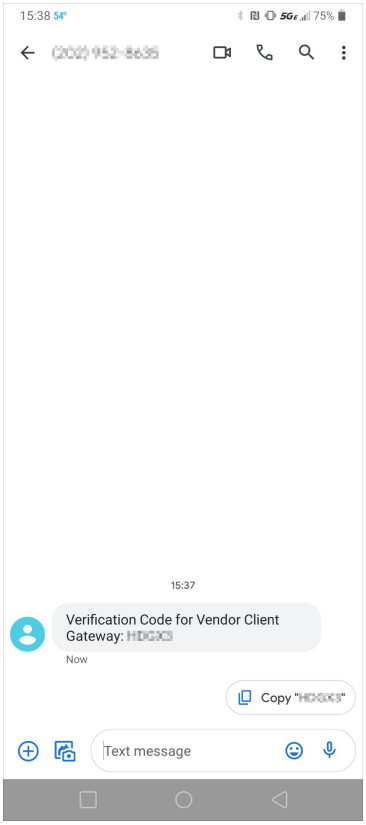
4. Change the **Multifactor Authentication Style** to SMS Code



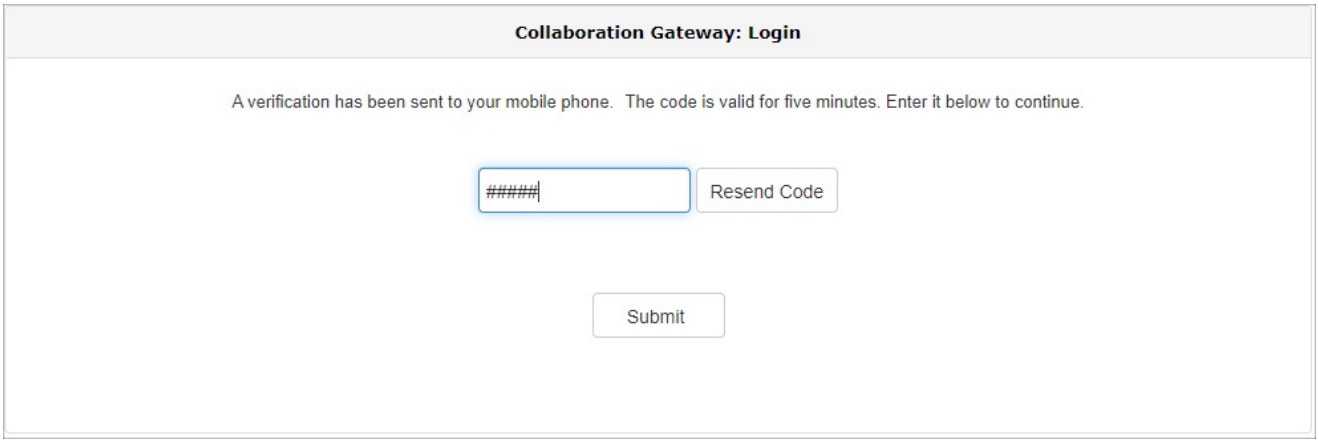
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SMS Verification Code in Action

The recipient receives an SMS text message to the mobile number indicated.



The user can then enter the verification code for MFA on the Gateway.



Once the code is entered, click **Submit** to enter the **Vendor/Client Gateway**.

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2.1 Contract and Committal Fields

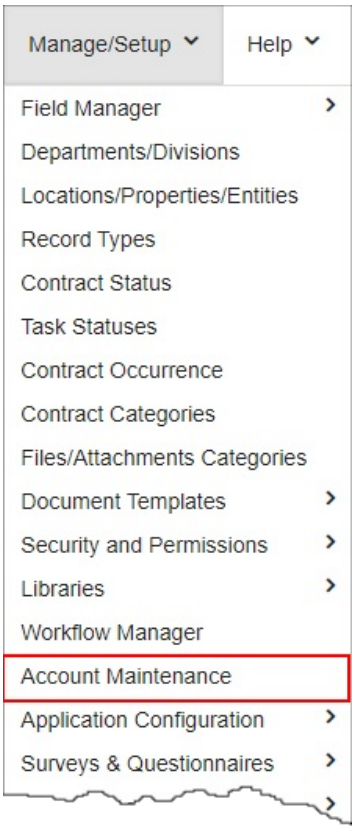
Contract & Committal Fields

Vendor/Client Gateway: Managing Fields Displayed for Contracts & Committals

Contract Insight allows system administrators and users with the appropriate permissions to manage the fields that are displayed on the Vendor/Client on the Gateway from the **Contract Details** screen.

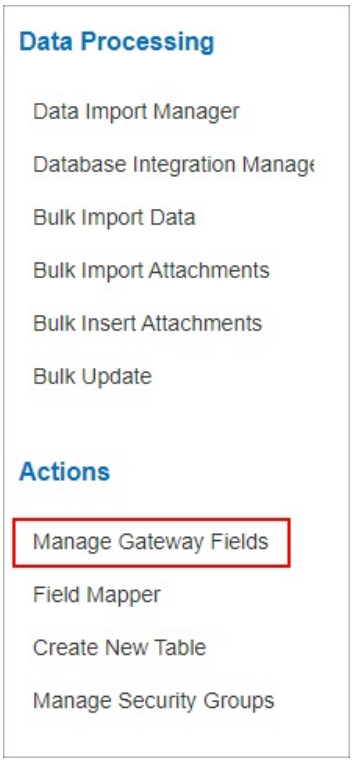
To access the Manage Gateway Fields screen

1.Navigate to **Manage/Setup - Account Maintenance**.



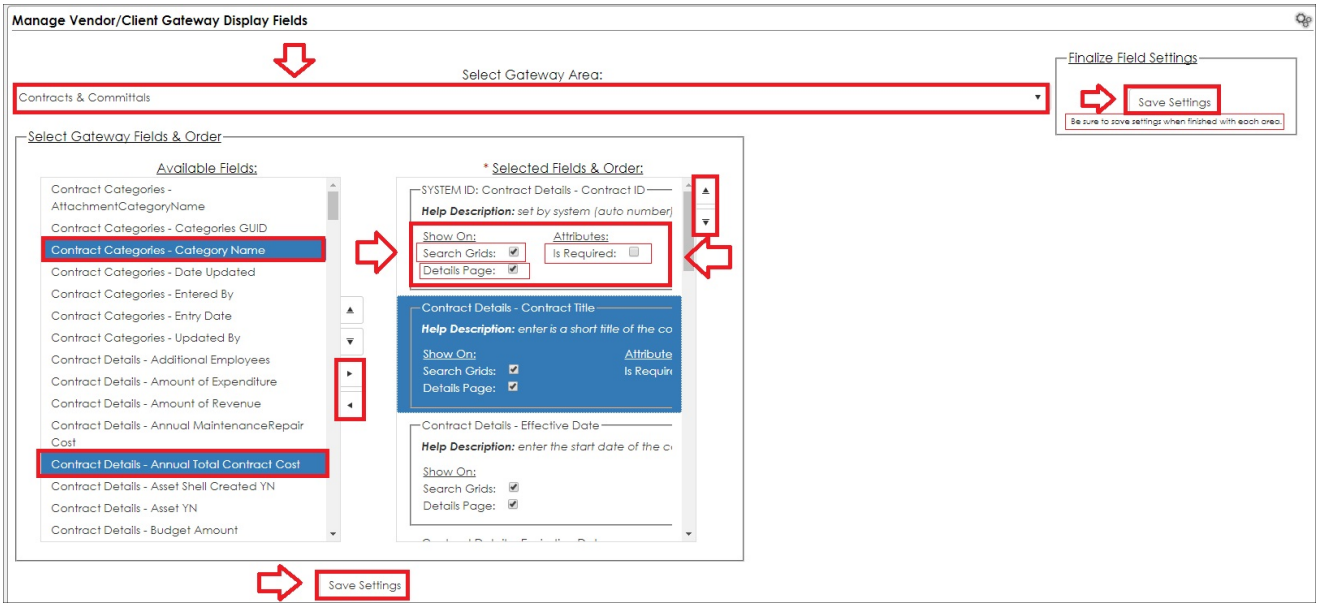
2. On the menu under **Actions**, click **Manage Gateway Fields**.

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3. The **Manage Vendor/Client Gateway Display Fields** screen displays. It displays fields that have been selected to be displayed on the gateway, as well as additional fields that are available to be displayed.

4. On the **Select Gateway Area** drop-down menu, select the **Contracts & Committals** area to manage the fields on the Contract Details screen to be displayed on the Gateway.



5. In the **Available Fields** list, the fields highlighted in dark teal-blue have already been added to the **Selected Fields & Order** list. When a field is added to the **Selected Fields & Order** list, select the Gateway screens for which the field display.

Show On:

If selected, the field will be displayed on the page checked:

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- **Search Grids**
- **Details Page**

Note: The **Attributes: Is Required** field does not need to be selected because Vendors/Clients cannot add Contracts on the Gateway; ignore the field.

6. To add a field from the **Available Fields** list, highlight the field and either click, drag, and drop the field to the proper position in the **Selected Fields & Order** list or click the **Right Arrow** to move the field to the bottom of the **Selected Fields & Order** list.

7. To change the order in which the fields displayed on the Gateway, select the field to move in the **Selected Fields & Order** list and either click the **up** and **down arrows** (to the right of the list) or click, drag, and drop the field in the desired field order.

8. Once the fields to display have been selected and ordered and all necessary **Show On** boxes have been marked, click **Save Settings**.

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2.2 Solicitation and Procurement Fields

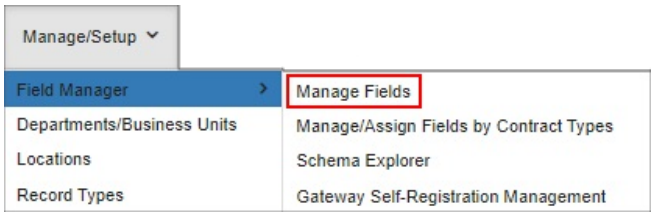
Solicitation & Procurement Fields

Vendor/Client Gateway: Managing Fields Displayed for Solicitations & Procurements

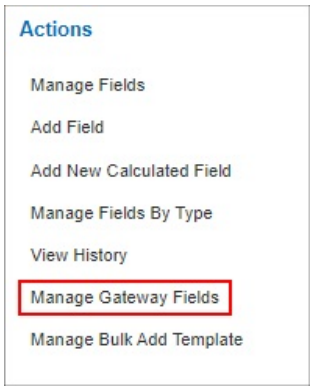
Contract Insight allows system administrators and users with the appropriate permissions to manage the fields that are displayed on the Vendor/Client on the Gateway from the **Solicitation Details** screen.

To access the Manage Gateway Fields screen

1. Navigate to **Manage/Setup** - **Field Manager** - **Manage Fields**.



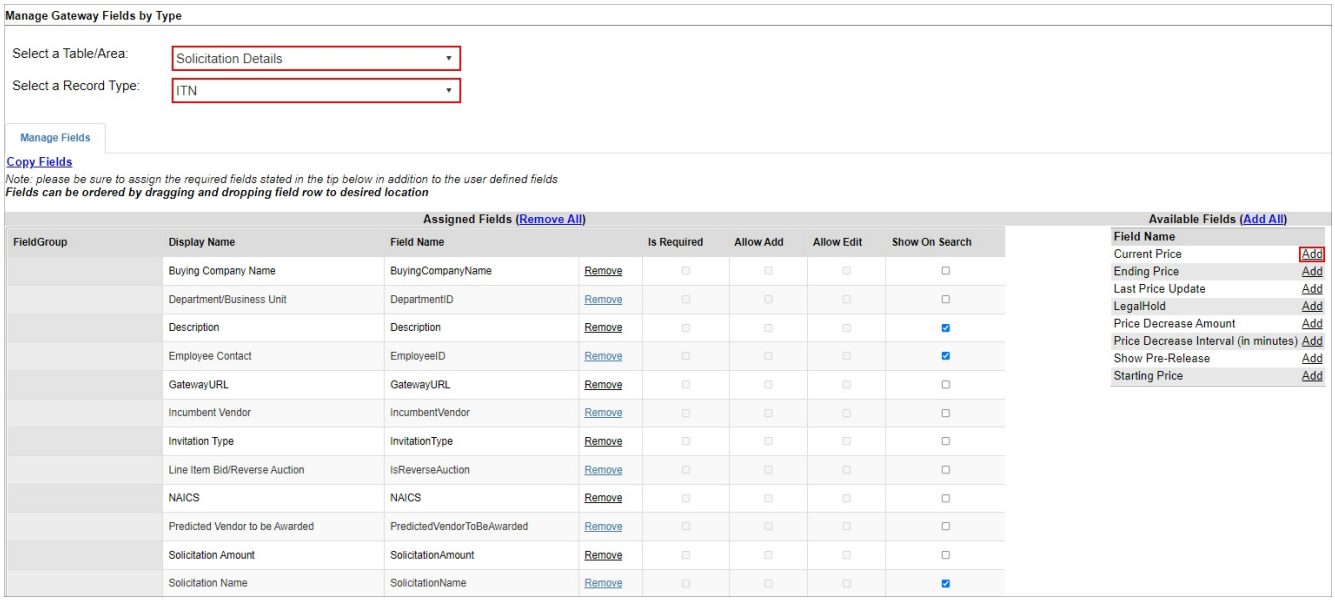
2. On the side menu under **Actions**, click **Manage Gateway Fields**



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3. The **Manage Vendor/Client Gateway Display Fields** screen displays. It displays fields that have been selected to be displayed on the gateway, as well as additional fields that are available to be displayed.

4. From the **Select Table/Area** drop-down menu, select **Solicitation Details.** Then, select which specific **Solicitation Type**.



5. In the **Assigned Fields** list, the fields highlighted in dark teal-blue have already been added to the **Selected Fields & Order** list. When a field is added to the **Selected Fields & Order** list, select the Gateway screens on which the field is to display.

Show On:

If selected, the field will be displayed on the page checked:

- **Search Grids**
- **Details Page**

Note: Attributes: Is Required does not need to be selected because Vendors/Clients cannot add Solicitations on the Gateway; ignore the field.

6. To add a field from the **Available Fields** list, click **Add** next to the desired field to move the field to the bottom of the **Assigned Fields** list.

7. To change the order in which the fields will be displayed on the Gateway, select the field to move in the **Assigned Fields** list and click, drag, and drop the field in the desired field order.

8. Once the fields to display have been selected and ordered and all necessary **Show On** boxes have been marked, click **Save Settings**.

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2.3 Contract and Committals Requests Fields

Contract & Committal Request Fields

Vendor/Client Gateway: Managing Fields Displayed for Contract & Committal Requests

Contract Insight allows system administrators and users with the appropriate permissions to manage the fields that are displayed on the Vendor/Client on the Gateway from the **Contract Request Details** screen, as well as on the Add Contract Request screen (if your organization has allowed Vendors/Clients to submit Contract Requests on the Gateway).

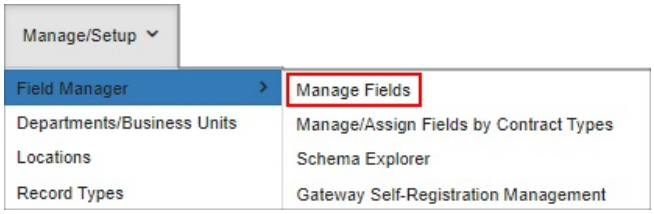
Solicitation & Procurement Fields

Vendor/Client Gateway: Managing Fields Displayed for Solicitations & Procurements

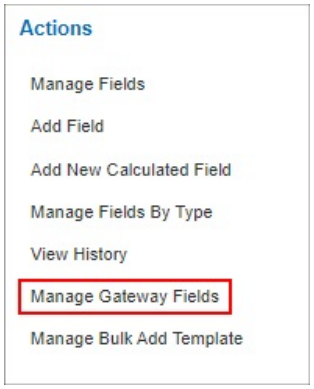
Contract Insight allows system administrators and users with the appropriate permissions to manage the fields that are displayed on the Vendor/Client on the Gateway from the **Solicitation Details** screen.

To access the Manage Gateway Fields screen

1. Navigate to **Manage/Setup** - **Field Manager** - **Manage Fields**.



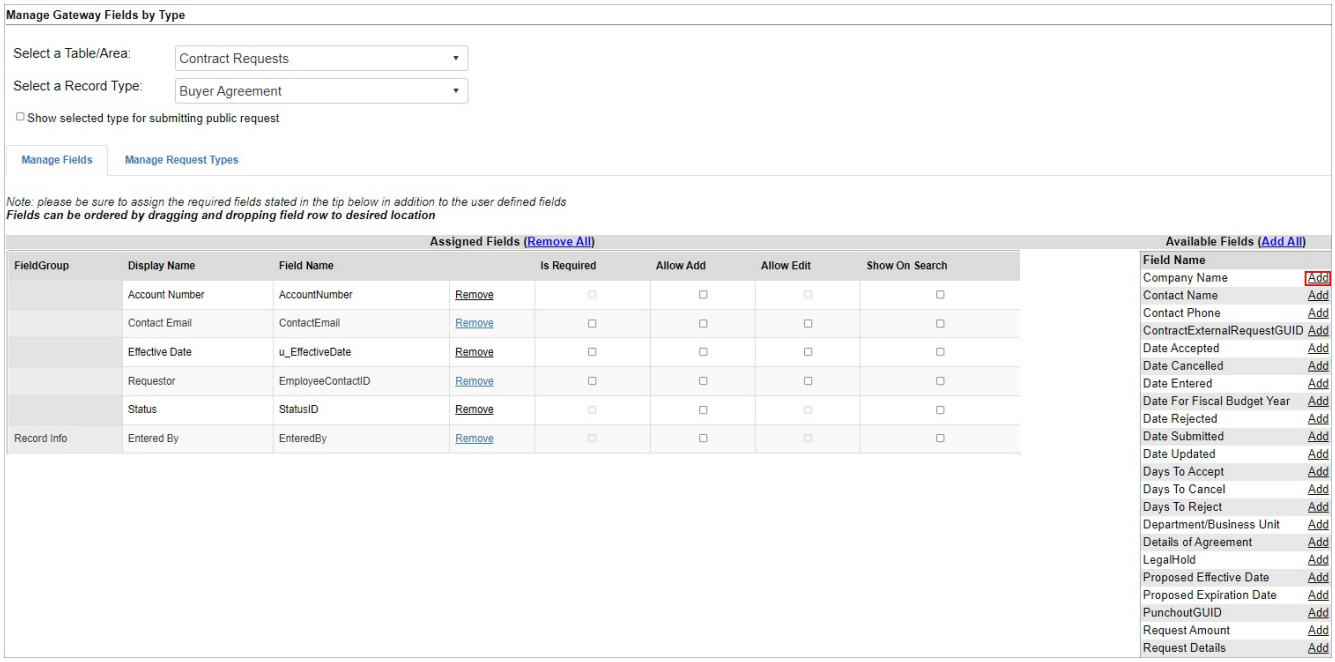
2. On the side menu under **Actions**, click **Manage Gateway Fields**



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3. The **Manage Vendor/Client Gateway Display Fields** screen displays. It displays fields that have been selected to be displayed on the gateway, as well as additional fields that are available to be displayed.

4. From the **Select Table/Area** drop-down menu, select **Contract Details.** Then, select which specific **Contract Type**.



5. In the **Assigned Fields** list, these fields have already been added to the **Selected Fields & Order** list. When a field is added to the **Selected Fields & Order** list, select the Gateway screens on which the field is to display.

Show On:
If selected, the field will be displayed on the page checked:

- **Search Grids**
- **Details Page**

Note: Attributes: Is Required does not need to be selected because Vendors/Clients cannot add Solicitations on the Gateway; ignore the field.

6. To add a field from the **Available Fields** list, click **Add** next to the desired field to move the field to the bottom of the **Assigned Fields** list.

7. To change the order in which the fields will be displayed on the Gateway, select the field to move in the **Assigned Fields** list and click, drag, and drop the field in the desired field order.

8. Once the fields to display have been selected and ordered and all necessary **Show On** boxes have been marked, click **Save Settings**.

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2.4 Company Contacts and User Fields

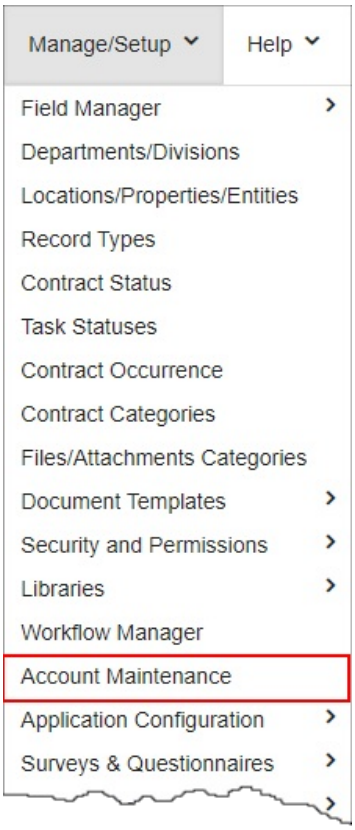
Company Contacts & Users Fields

Vendor/Client Gateway: Managing Fields Displayed for Company Contacts/Users

Contract Insight allows system administrators and users with the appropriate permissions to manage the fields that are displayed on the Vendor/Client on the Gateway from the **Company Details - Company Contact** Record.

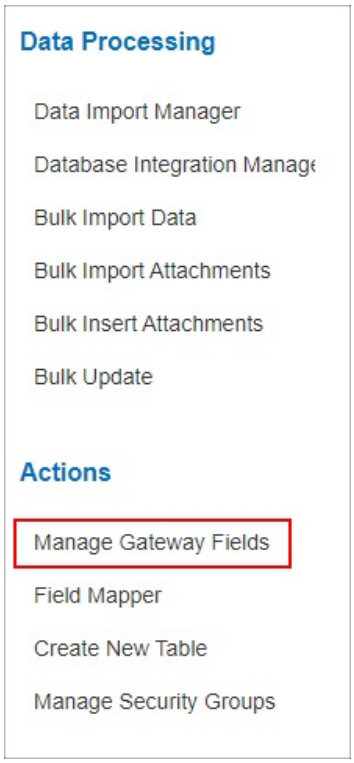
To access the Manage Gateway Fields screen

1. Navigate to **Manage/Setup - Account Maintenance**.



2. On the side menu under **Actions**, click **Manage Gateway Fields**.

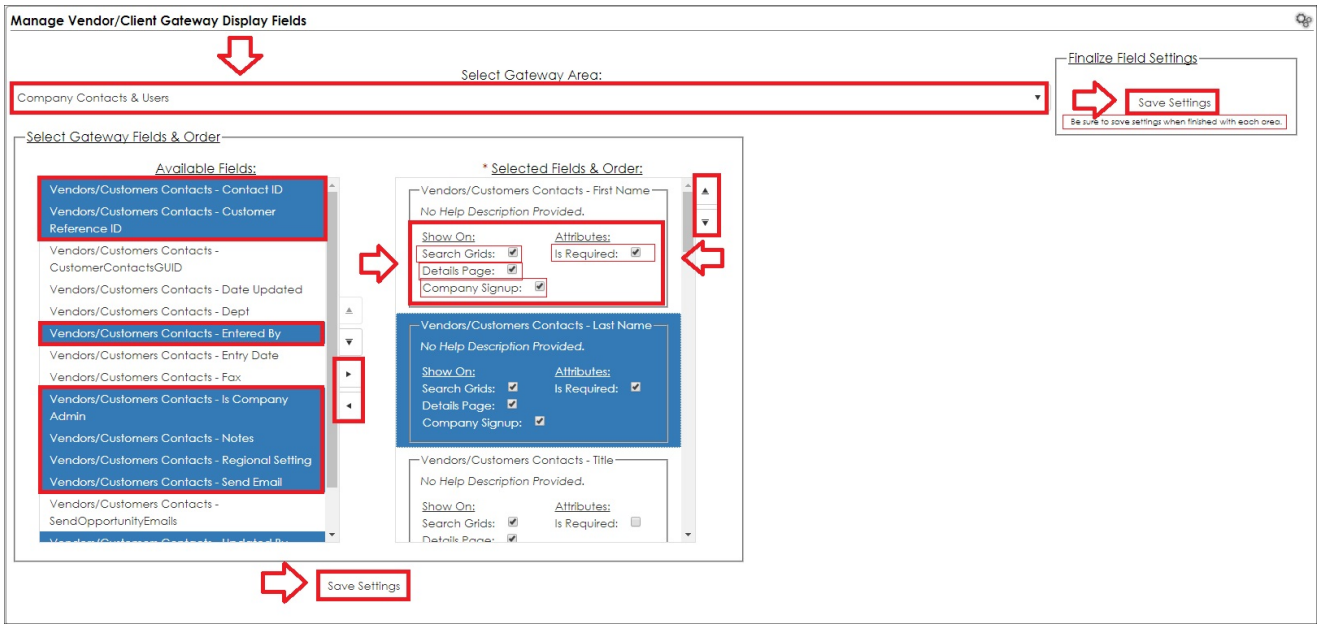
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3. The **Manage Vendor/Client Gateway Display Fields** screen displays. It displays fields that have been selected to be displayed on the gateway, as well as additional fields that are available to be displayed.

4. From the **Select Gateway Area** drop-down menu, select the **Company Contacts & Users** area to manage the fields on the Solicitation Details screen to be displayed on the Gateway.



5. In the **Available Fields** list, the fields highlighted in dark teal-blue have already been added to the **Selected Fields & Order** list. When a field is added to the **Selected Fields & Order** list, select the Gateway screens on which the field is to display.

Show On:
If selected, the field will be displayed on the page checked:

- **Search Grids**
- **Details Page**

Note: **Attributes: Is Required** does not need to be selected because Vendors/Clients cannot add Solicitations on the Gateway; ignore the field.

6. To add a field from the **Available Fields** list, highlight the field and either click, drag, and drop the field to the proper position in the **Selected Fields & Order** list or click the **right arrow** to move the field to the bottom of the **Selected Fields & Order** list.

7. To change the order in which the fields will be displayed on the Gateway, select the field to move in the **Selected Fields & Order** list and either click the **up** and **down arrows** (to the right of the list) or click, drag, and drop the field in the desired field order.

8. Once the fields to display have been selected and ordered and all necessary **Show On** boxes have been marked, click **Save Settings**.

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2.5 Vendor/Customer Information Fields

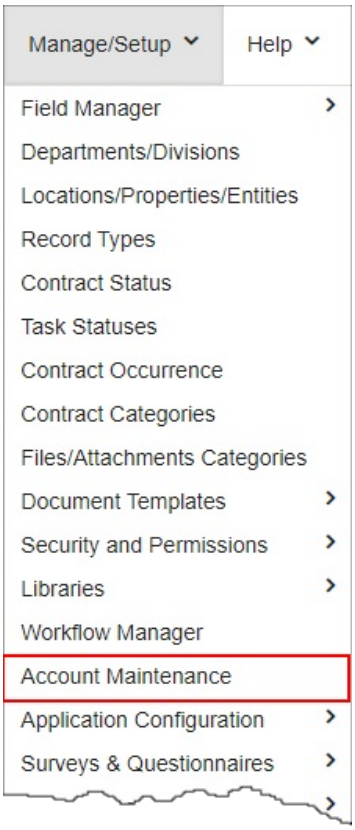
Vendor/Customer Information Fields

Vendor/Client Gateway: Managing Fields Displayed for from Vendor/Customer Information

Contract Insight allows system administrators and users with the appropriate permissions to manage the fields that are displayed on the Vendor/Client on the Gateway from the Vendor/Customer Details screen as well as fields to be displayed on New Company Signups through the Gateway.

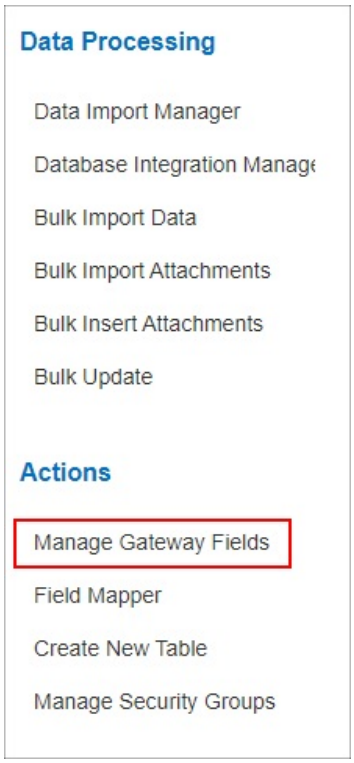
To access the Manage Gateway Fields screen

1. Navigate to **Manage/Setup - Account Maintenance**.



2. On the side menu under **Actions**, click **Manage Gateway Fields**.

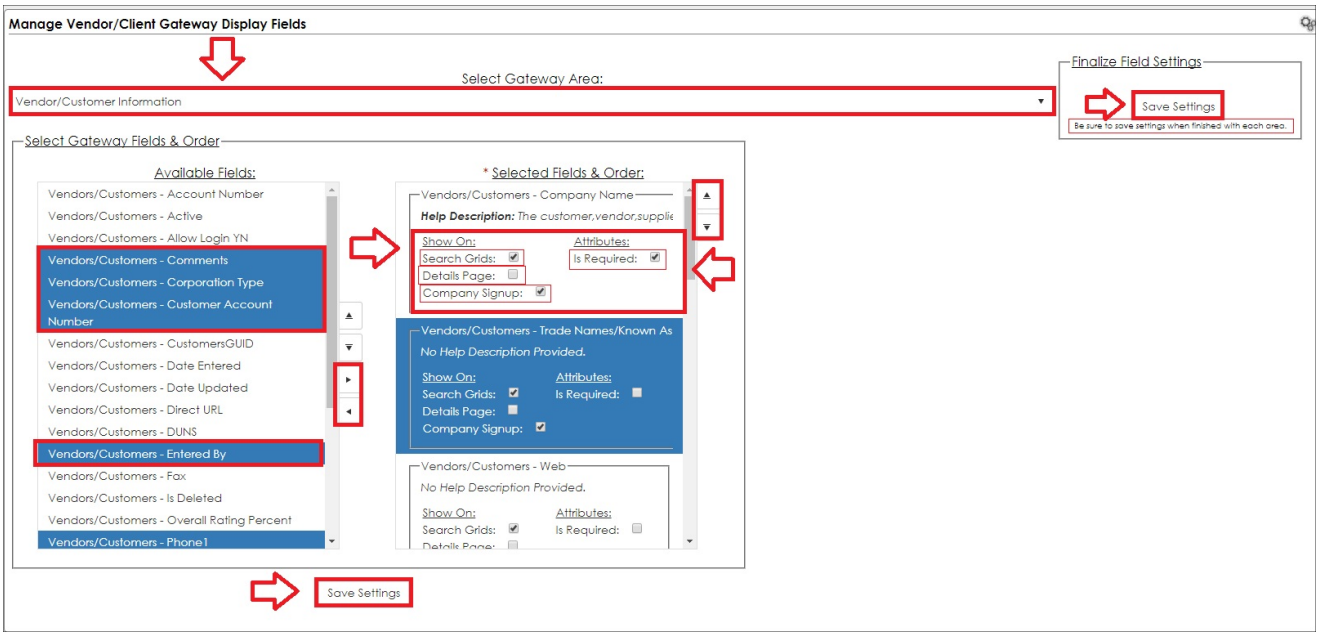
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3. The **Manage Vendor/Client Gateway Display Fields** screen displays. It displays fields that have been selected to be displayed on the gateway, as well as additional fields that are available to be displayed.

4. From the **Select Gateway Area** drop-down menu, select the **Vendor/Customer Information** area to manage the fields on the Solicitation Details screen to be displayed on the Gateway.



5. In the **Available Fields** list, the fields highlighted in dark teal-blue have already been added to the **Selected Fields & Order** list. When a field is added to the **Selected Fields & Order** list, select the Gateway screens on which the field is to display.

Show On:

If selected, the field will be displayed on the page checked:

- **Search Grids**
- **Details Page**

Note: **Attributes: Is Required** does not need to be selected because Vendors/Clients cannot add Solicitations on the Gateway; ignore the field.

6. To add a field from the **Available Fields** list, highlight the field and either click, drag, and drop the field to the proper position in the **Selected Fields & Order** list or click the **right arrow** to move the field to the bottom of the **Selected Fields & Order** list.

7. To change the order in which the fields will be displayed on the Gateway, select the field to move in the **Selected Fields & Order** list and either click the **up** and **down arrows** (to the right of the list) or click, drag, and drop the field in the desired field order.

8. Once the fields to display have been selected and ordered and all necessary **Show On** boxes have been marked, click **Save Settings**.

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3.1 Contract and Committal Content

Contract & Committal Content

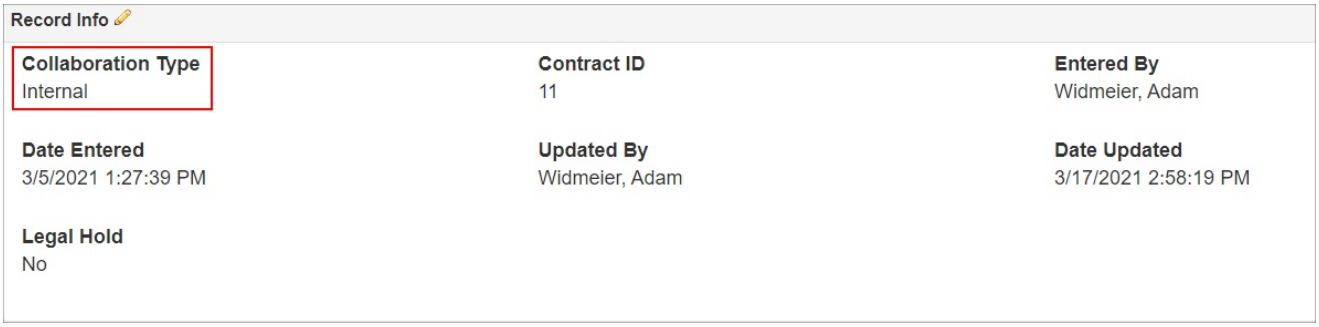
Vendor/Client Gateway: Contract & Committal Content

For a Contract Record's details to be displayed on the **Vendor Client Gateway** or **Public Portal**, the Contract Record's **Collaboration Type** field must be set.

Note: if a Contract is set to **Gateway** or **Public**, only the fields selected to be displayed are shown. Please see the **Contract & Committal Fields** Wiki page for more information about selecting fields from the Contract Details screen to be displayed on the Gateway.

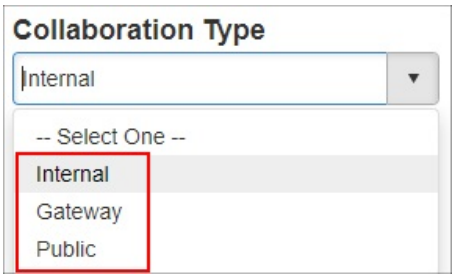
Contract Details

1. Navigate to the **Contract Details** screen that you would like to manage the Collaboration Type for.



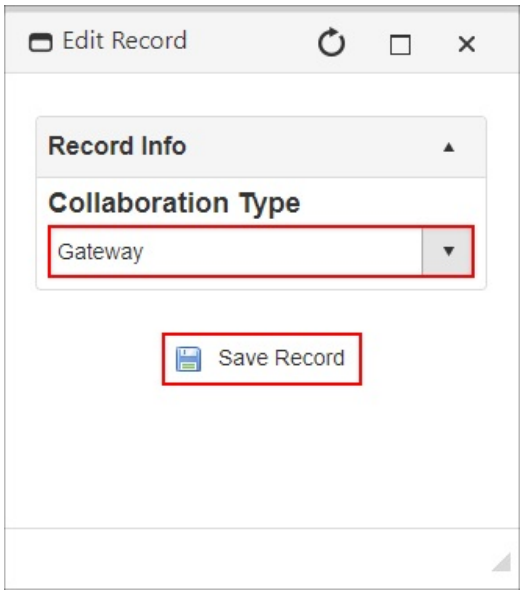
2. The three options for the Contract's **Collaboration Type** are:

- **Internal**: Only users within your organization will be allowed to view the Contract Details.
- **Public**: Vendors/Clients will be able to view the Contract Details for this Contract record without being prompted to login to the Gateway (authenticated) portion.
- **Gateway**: Vendors/Clients will need to sign-up and/or log in to the Gateway in order to view the details of this Contract Record.



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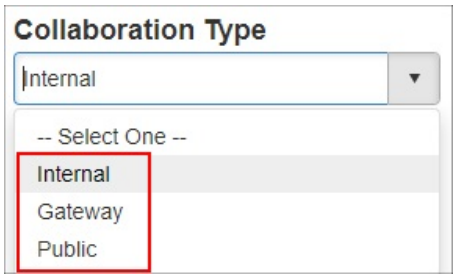
3. To edit the Collaboration Type, click the pencil icon for **Collaboration Type** to open the **Edit Field** screen.



4. Select the new value from the drop-down and click **Save Record** to update the value of the field.

Contract Attachments

For a Contract Record's files/attachments to be displayed on either the public portion or the gateway portion of the **Vendor/Client Gateway**, for each File/Attachment, when it is added/uploaded to the Contract, select the **Collaboration Type** from the drop down provided.

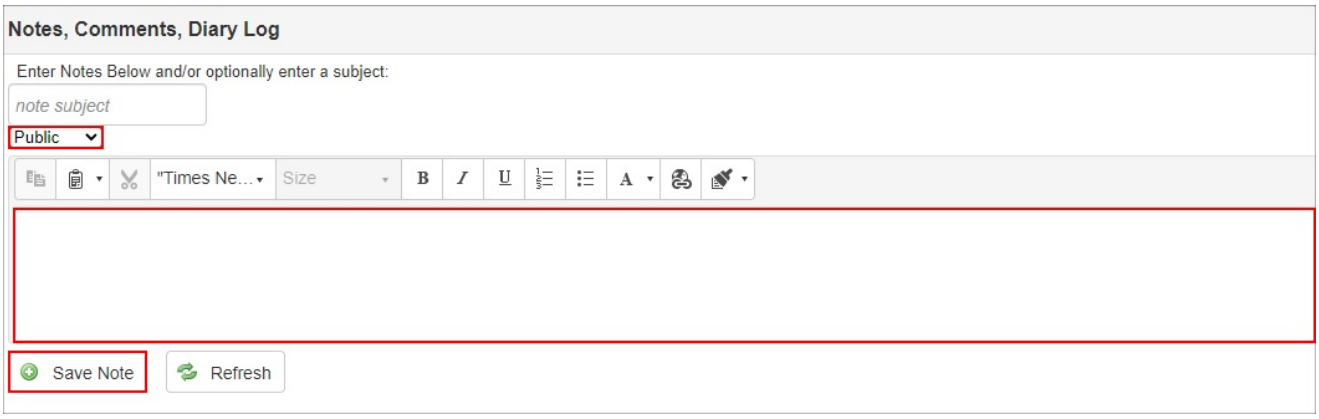


Note: this field cannot be edited for a Contract Attachment. To change the collaboration type for a contract attachment, the attachment must be deleted and then uploaded with the correct collaboration type selected.

Contract Notes

For a note in the Contract Details' Notes Repository to be displayed on either the public portion or the gateway portion of the **Vendor/Client Gateway**, the note's collaboration type should be selected according to the desired viewing state.

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3.2 Solicitation and Procurement Content

Solicitation & Procurement Content

Vendor/Client Gateway: Solicitation & Procurement Content

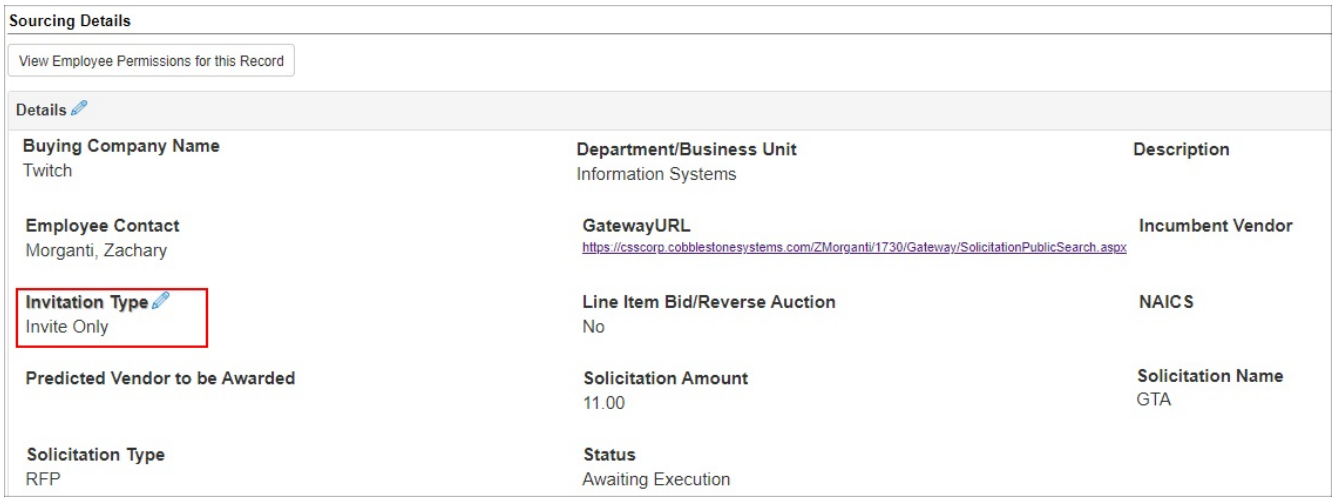
For a Solicitation Record's details to be displayed on the **Vendor Client Gateway** or **Public Portal**, the Solicitation Record's **Invitation Type** field must be set.

Note: If a Solicitation's Invitation Type is set to **Public** or **Invitation Only**, only the fields selected to be displayed will be shown. Please see the **Solicitation & Procurement Fields** Wiki page for more information about selecting fields from the Solicitation Details screen to be displayed on the Gateway.

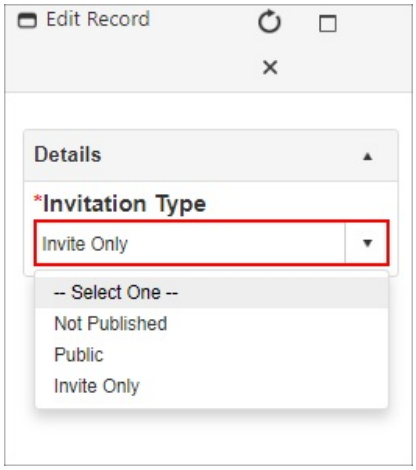
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Solicitation Details:

1. Navigate to the **Solicitation Details** screen to manage the **Invitation Type** for the record.



2. The Invitation Types available are:



Not Published: The Solicitation record will not be available on either the Vendor/Client Gateway or the Public portion of the Gateway (Internally Only).

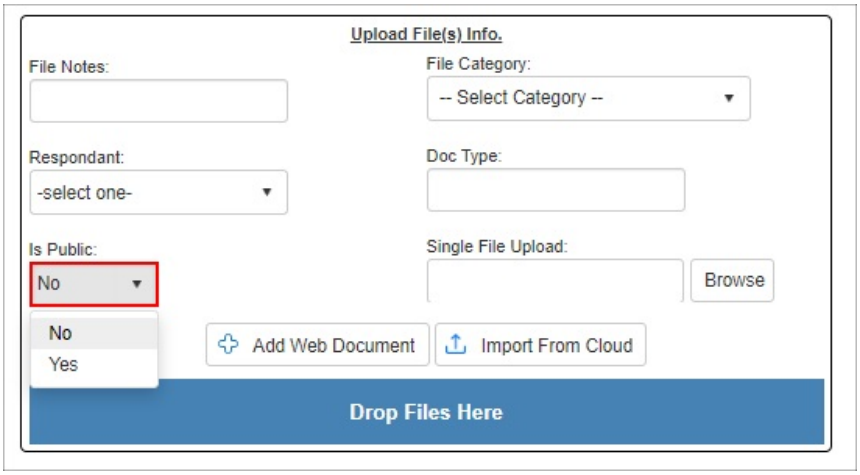
Public: The Solicitation will be available to be viewed on the Public portion of the Vendor/Client Gateway (non-authenticated Vendors/Clients will be allowed to view).

Invite Only: The Solicitation will be available only to Vendors/Clients on the Gateway whom you have specified as potential respondents.

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Solicitation Files/Attachments:

For a Solicitation Record file/attachment to be viewable, select (when uploading the attachment) the **Collaboration Type** for the attachment:



Note: By specifying **Public** = Yes, the file/attachment displays only to the area in which the Solicitation Record is displayed (depending on the **Invitation Type** selected for the Solicitation Record).

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4.1 Adding a Company Contact in Contract Insight Core

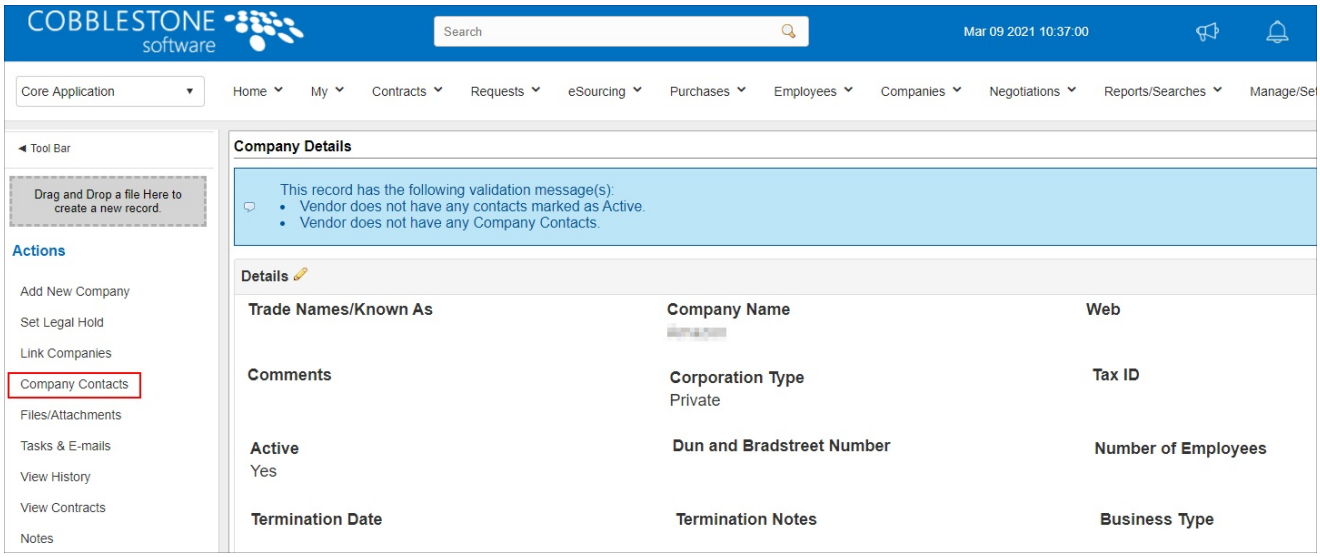
Adding a Company Contact in Contract Insight Core

Vendor/Client Gateway: Activating Company Contacts to Permit Access to the Gateway

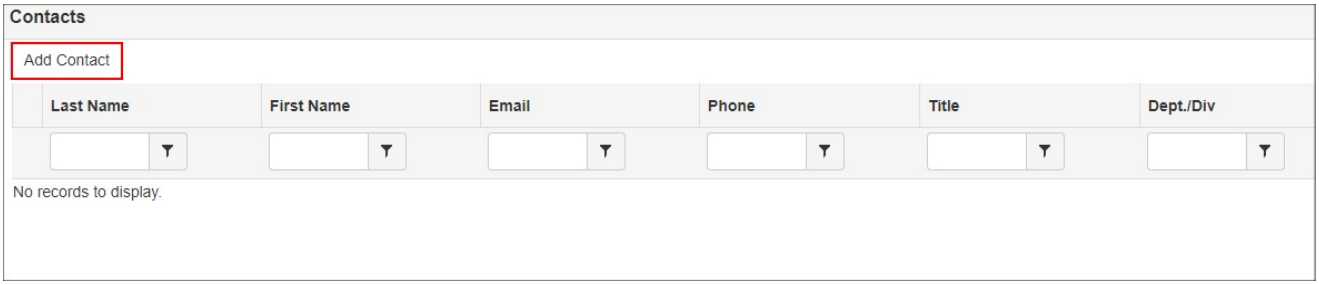
Contract Insight enables authorized users to add contacts for a company through the **Company Details** screen.

To allow a Company Contact access to the Vendor/Client Gateway (from within your Contract Insight Core Application)

1. On the side menu of the **Company Details** screen, click **Company Contacts** or scroll down the Company Details screen.



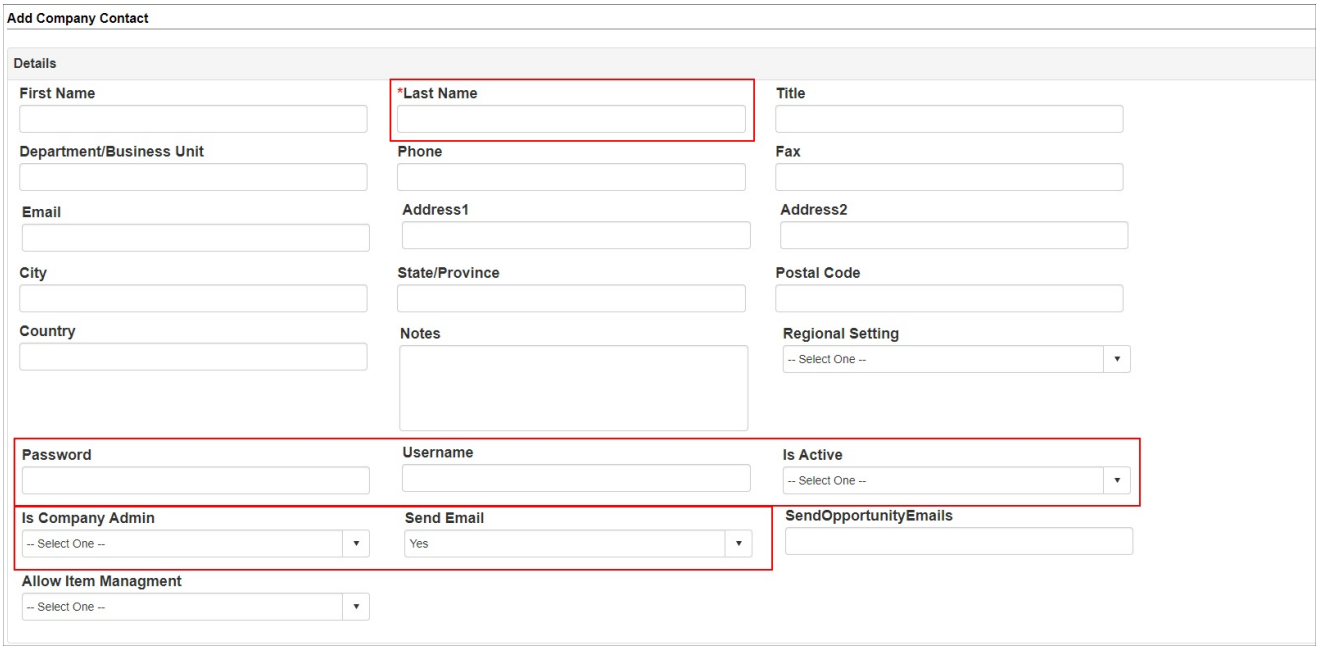
2. Both methods go to the **Contacts** section of the **Company Details** screen.



3. To add a contact for the company, click **Add Contact** in the **Contacts** section.

4. The **Add Company Contact** screen displays.

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Note: that the following fields must be populated to allow the Company Contact to access the Vendor/Client Gateway:

- **Username & Password:** Each Company Contact will need his or her own unique **User Name** and **Password** to log-in to the Gateway.
- **Is Active:** If the Company Contact is allowed to log-in to the **Vendor/Client Gateway**, **Is Active** needs to be set to **Yes** (in addition to having a username and password set for the contact).
- **Is Company Admin**: If the Company Contact being added is the main point of contact for the Company, **Is Company Admin** should be set to **Yes**. The Company Admin will be able to log-in to the **Vendor/Client Gateway** and will have the ability to manage (Add, Update, and Delete) additional users within his or her organization.

5. Enter all additional necessary/required information and click **Save** to save the new contact information. Click **Cancel** link in the side menu to cancel adding the new contact information.

6. The new contact is added to the **Contacts** section of the **Company Details** screen.

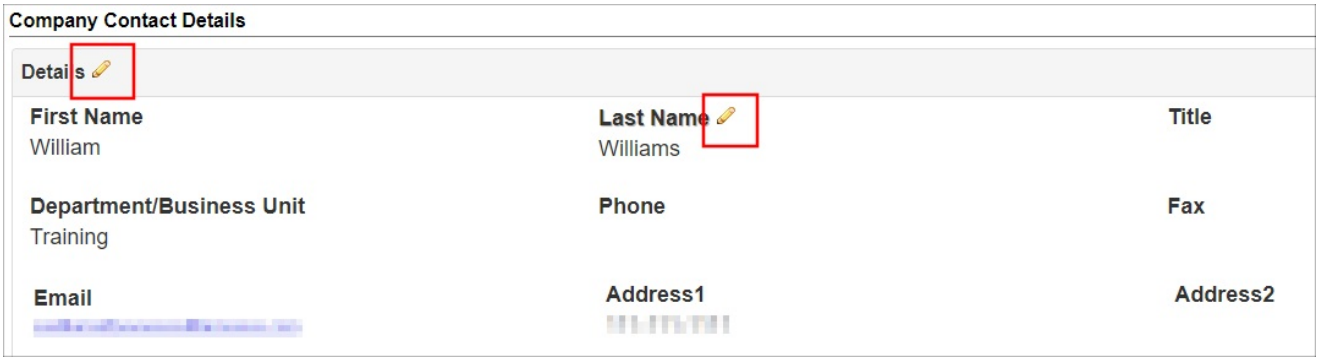


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To Edit a Company Contact

1. Click the **Pencil Icon** ( ) for the Company Contact line item you would like to edit.

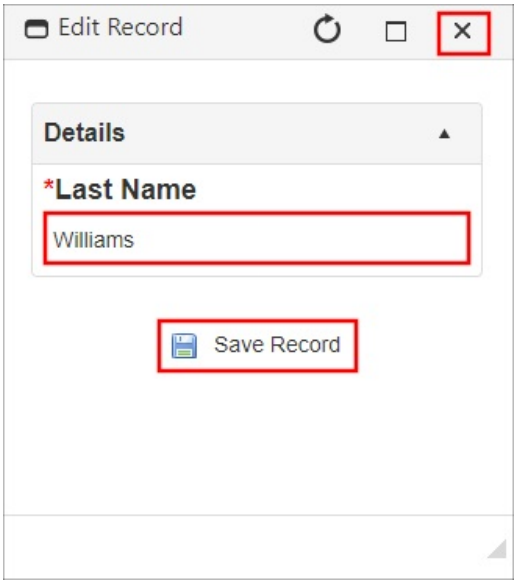
2. The **Company Contact Details** for the **Company Contact** display.



3. Click the **Pencil Icon** for the field line item to edit for the Contact.

Note: When clicking the **Pencil Icon** to the right of the field group, multiple fields can be edited at once. For example, if just edit two fields are edited and **Save Record** clicked, only those two fields are updated.

4. The **Edit Field** pop-up window displays. Update the value of the field and click **Save Record** to save the updated value for the field. Click the **X** in the upper right to cancel updating the field value.



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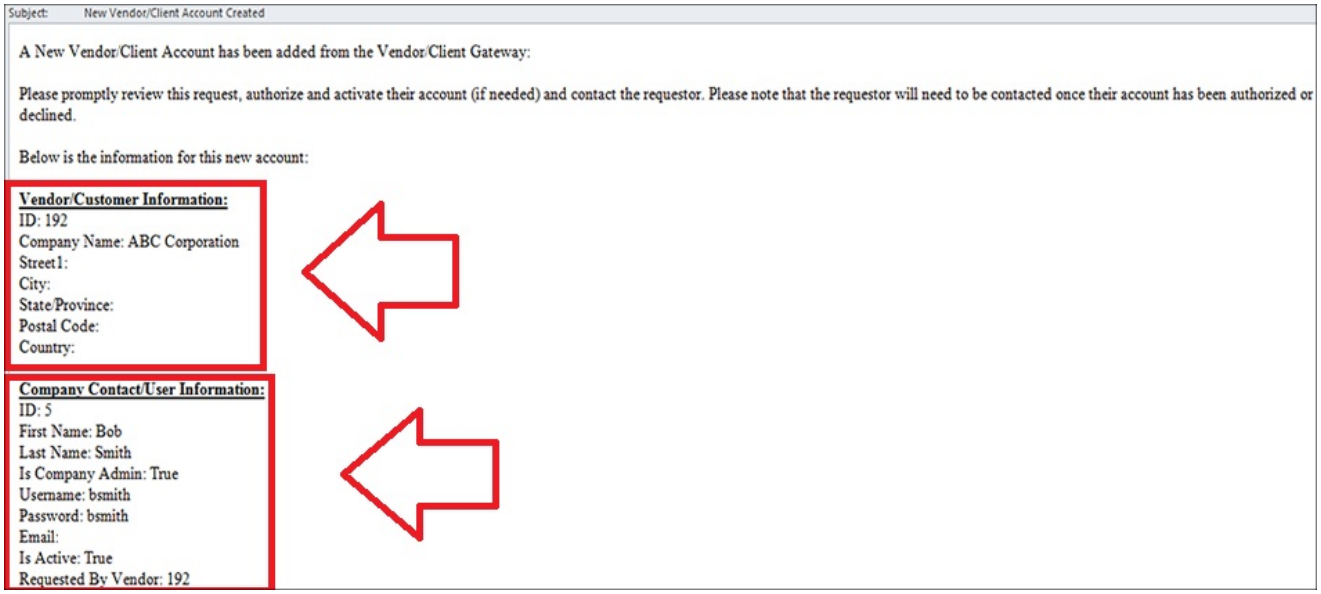
4.2 Activating a Company Contact Account

Activating a Company Contact Account

Vendor/Client Gateway: Activating a Company Contact Account

Once a Company has created an account through the **Vendor/Client Gateway**, the Company Contact's account needs to be activated in order for the Contact to be allowed to submit Contract Requests (if your organization has enabled this feature) and respond to Solicitations, both Public and those only displayed on the Gateway.

1. Upon creation of a Company Contact account, the e-mail address specified to be alerted on new Gateway account creations will receive an email.

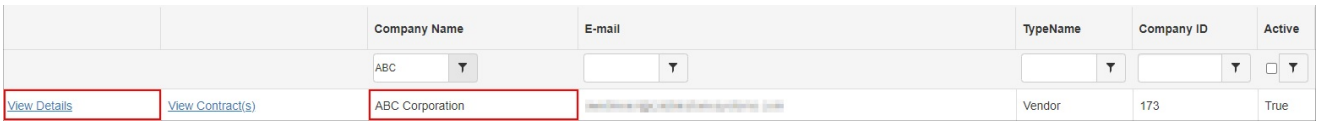


2. Upon receipt of a **New Vendor/Client Account Created** email, an Application Administrator needs to log-in to Contract Insight to activate the Company Contact's account.

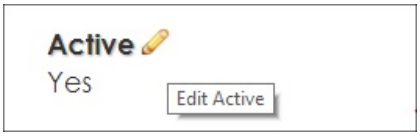
3. **Navigate to Companies - Company List** via the top navigation menu.

4. Search for the **Company Name** that was included in the **New Account email** and click **View Details** for the Company.

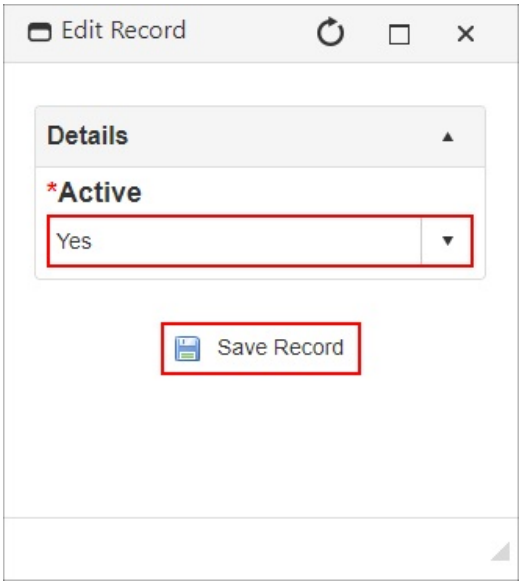
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5. On the **Company Details** screen, hover your mouse over to the right of **Active** and click the **Pencil Icon** ( ) to edit that field.



6. Change the **Active** field to Yes and click **Save Record**.



7. Confirm the field was updated and email the Company Contact to inform him or her that the account has been activated.

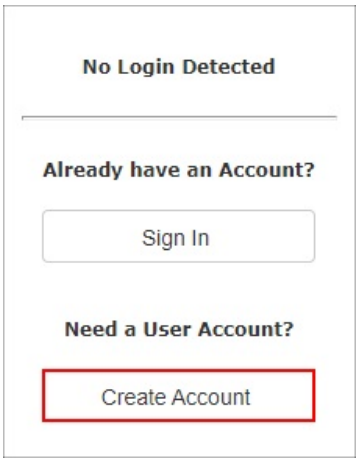
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5.1 Creating an Account on the Gateway

Creating an Account on the Gateway

Vendor/Client Gateway: Signing Up/Creating an Account on the Gateway

1. To create a new account to signup and log into the **Vendor/Client Gateway**, click **Create Account** on the side menu of the **Gateway Introduction** screen.



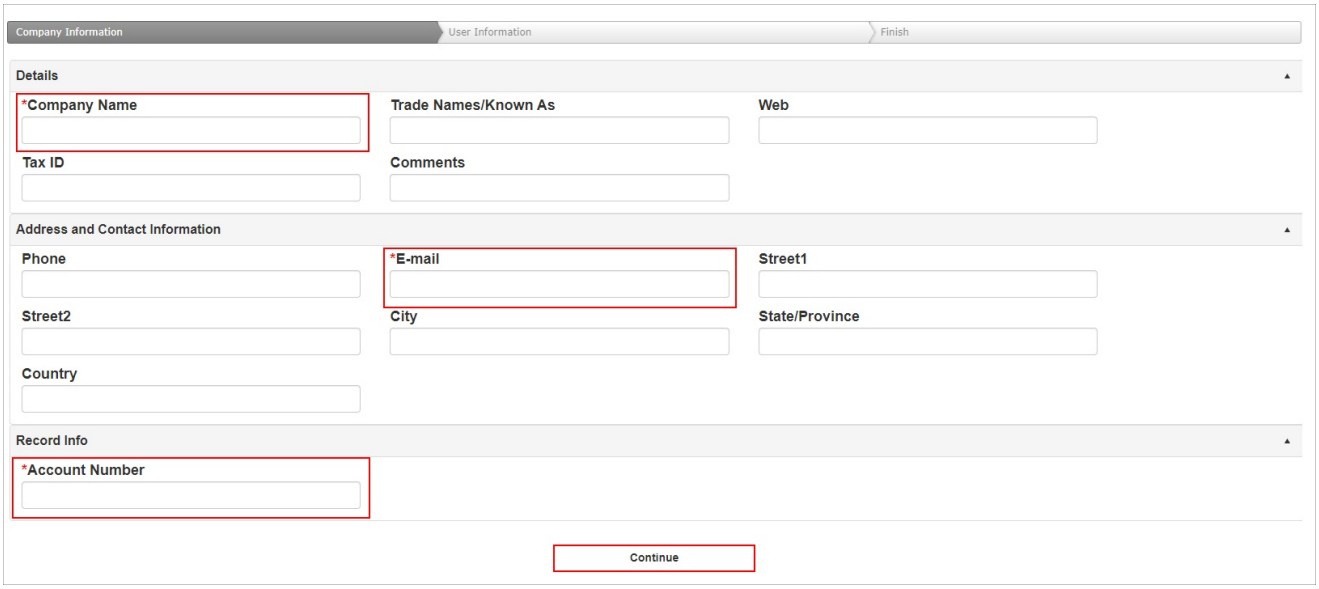
2. The **New Account Signup** screen displays.

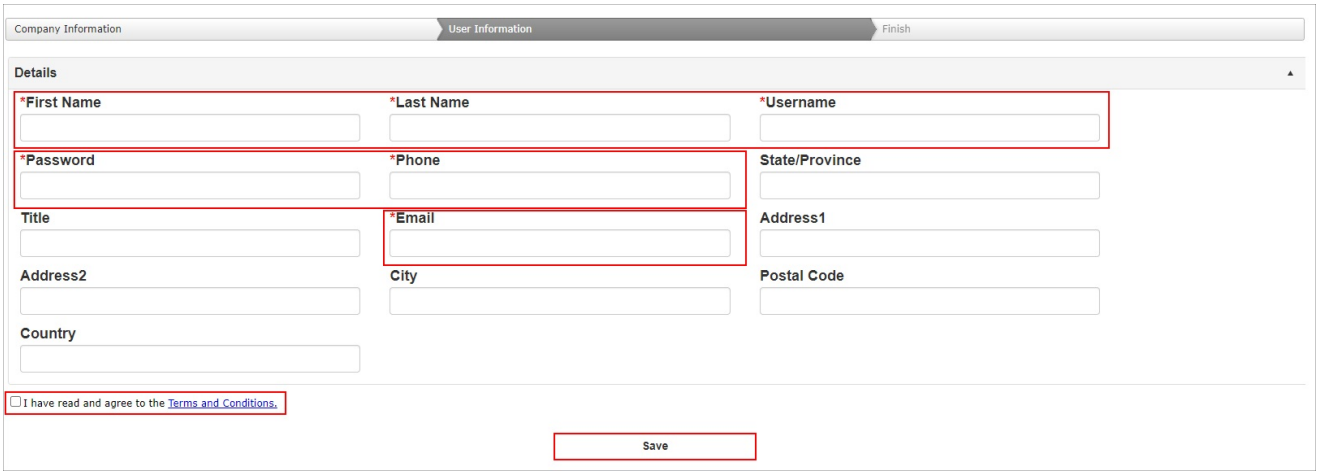


Note: Click **Help** on top navigation menu and select the link to the organization's site to learn how to signup and register for a new account.

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3. If the Gateway's owning organization has allowed Vendors/Clients to register and create a new account through the Gateway, the **New Account Signup** screen displays.





Note: The **New Account Signup** screen may have different fields displayed/required than shown above, based on the fields the organization has selected/required to be displayed on the New Account Signup screen.

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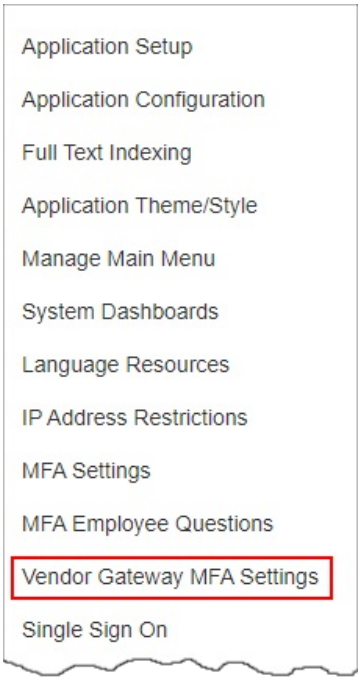
4. Once all necessary and required information on the **Company Information** and **User Information** sections has been entered, click **Continue**.

5. The **New Account Signup - Confirmation** screen with the Company/User log-in information displays.



VCG MFA on Account Creation

In the Core system, navigate to **Application Configuration** > **Manage / Setup** > **Application Configuration** > **Config Settings** and select the **Vendor Gateway MFA Settings** menu option.



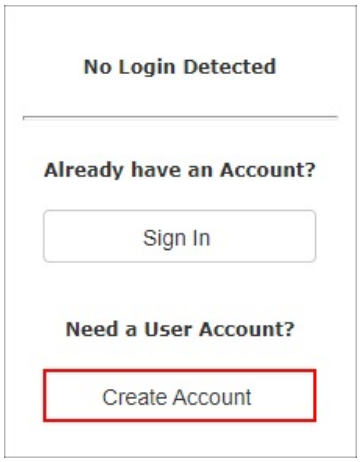
Enable the MFA code on the registration page.

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Setting	Description	Value
Enable Multifactor Authentication on the Gateway	Enable or disable multifactor authentication on the Gateway registration page	True

OPTIONAL – Update the remaining settings as desired. These include code style, length and message. NOTE – The message text is HTML, email clients may render this differently than it appears in the web page. This is particularly true of MS Outlook which uses the IE engine to display HTML.

Navigate to the gateway site and click the Create Account button

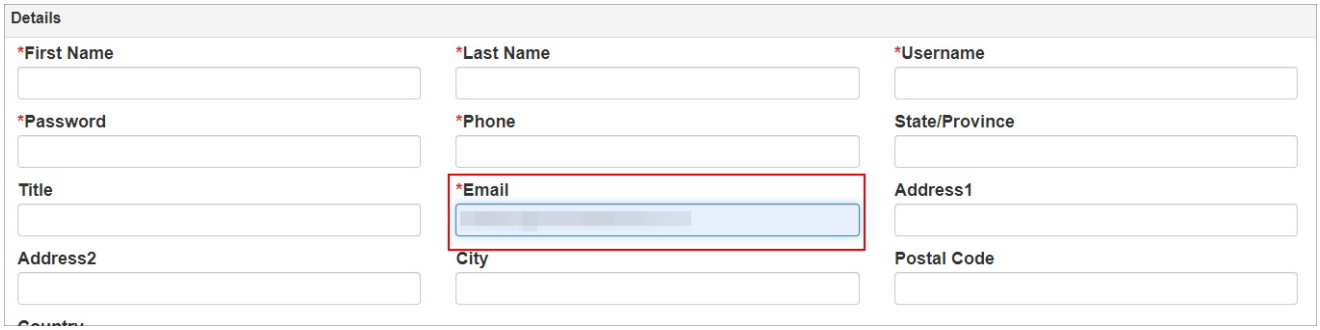


Note the new tab in the wizard navigation



Fill in Company Information form

Fill in the User Information form. Make sure to use an email address you have access to on this form

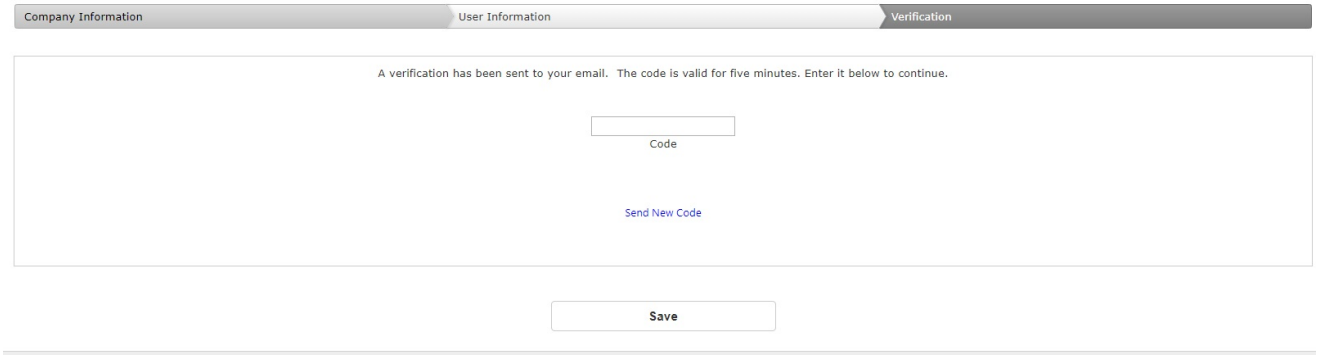


At the bottom of the form agree to the terms and conditions and enter the Captcha code.

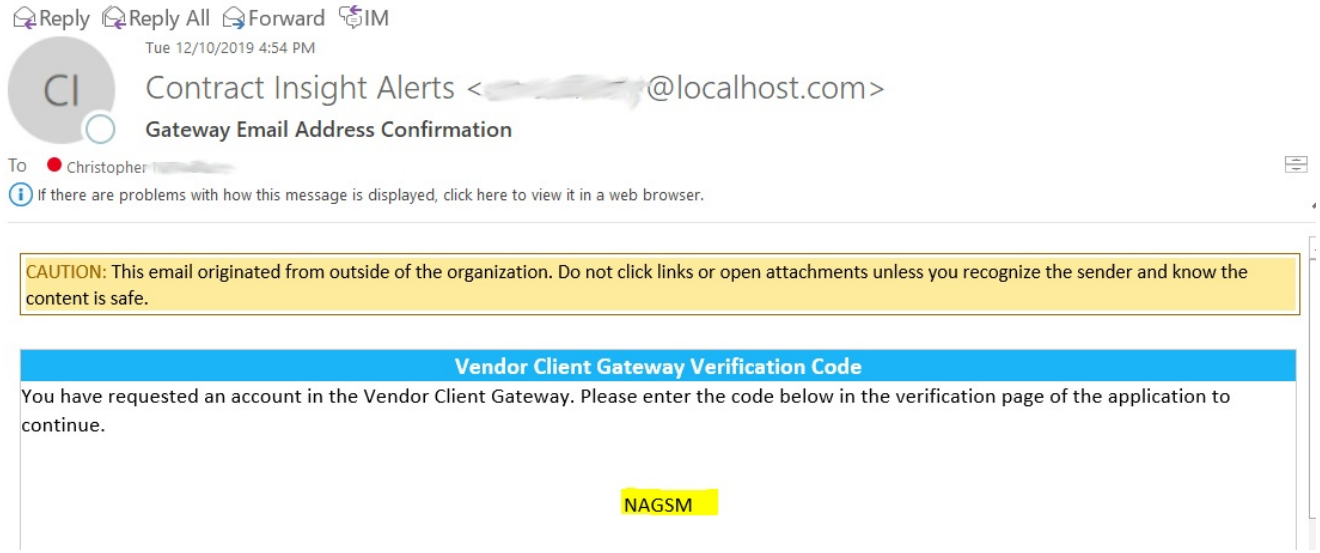
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NOTE: If the form validation fails you will be required to re-enter the password and the captcha. This is by design.

The final tab will display the email address where the code was sent

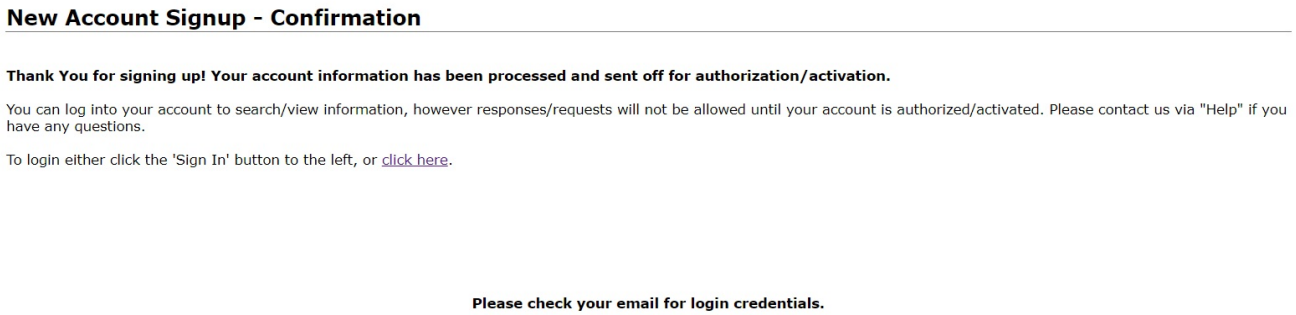


Check your email to retrieve the code



Enter the code in the text box and click the Save button at the bottom.

The gateway generates the account and provides follow up instructions. This functionality has not been changed.



Note: The registrant can then log-in to the Gateway to view/search information but is not authorized to submit responses/requests until the account has be authenticated and activated by the Gateway's organization.

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6. Click **Continue to My Company Account** or **Login Now** to log into the Gateway. For more information about logging in to the Gateway, visit the Logging In/Forgot Password Wiki page.

Wizard-Based Registration

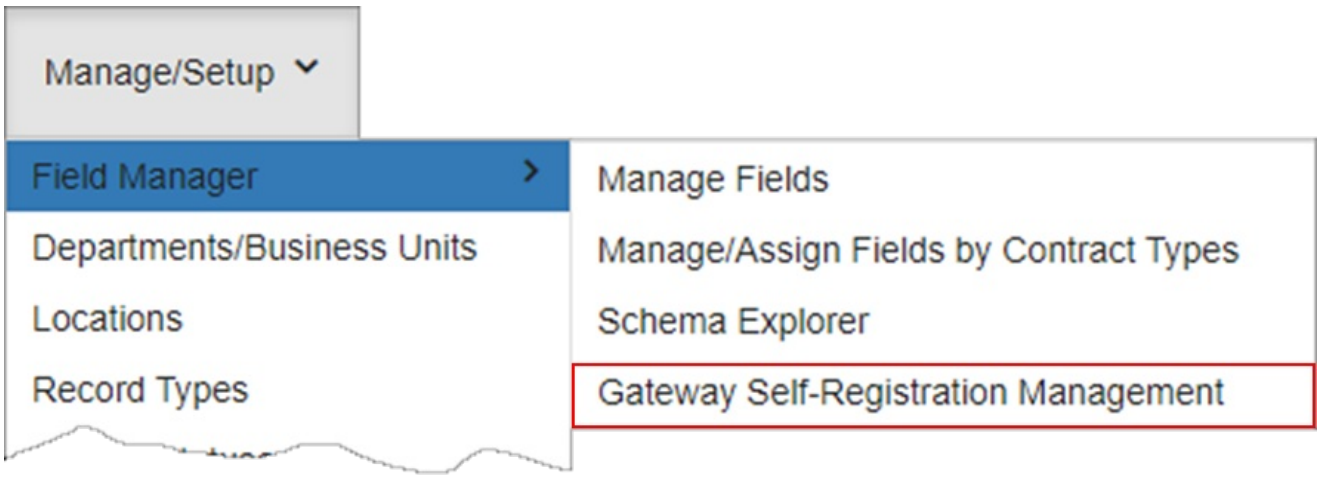
An Admin to choose to use wizard-based registration for Vendor Client Gateway.

To access this:

1. Click **Manage/Setup**

2. Click **Field Manager**

3. Click **Gateway Self-Registration Management**

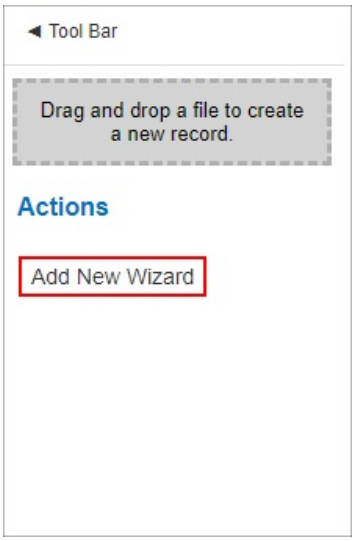


From here, an Admin may add, edit, or delete a wizard.

To add a wizard, click **Add New Wizard** under the Actions side menu.

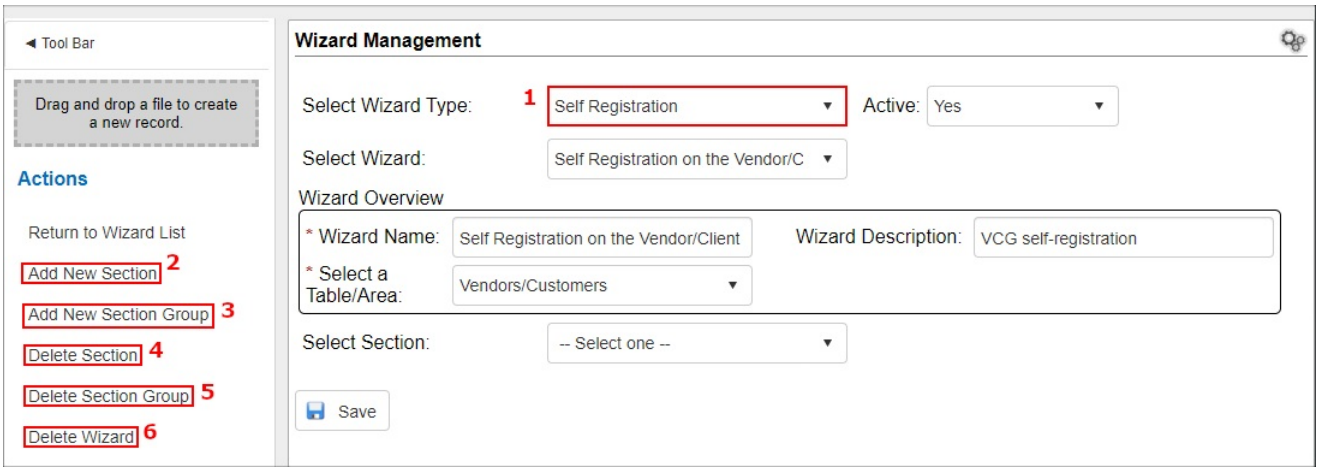
Once the wizard is saved, the user may assign the fields to the group.

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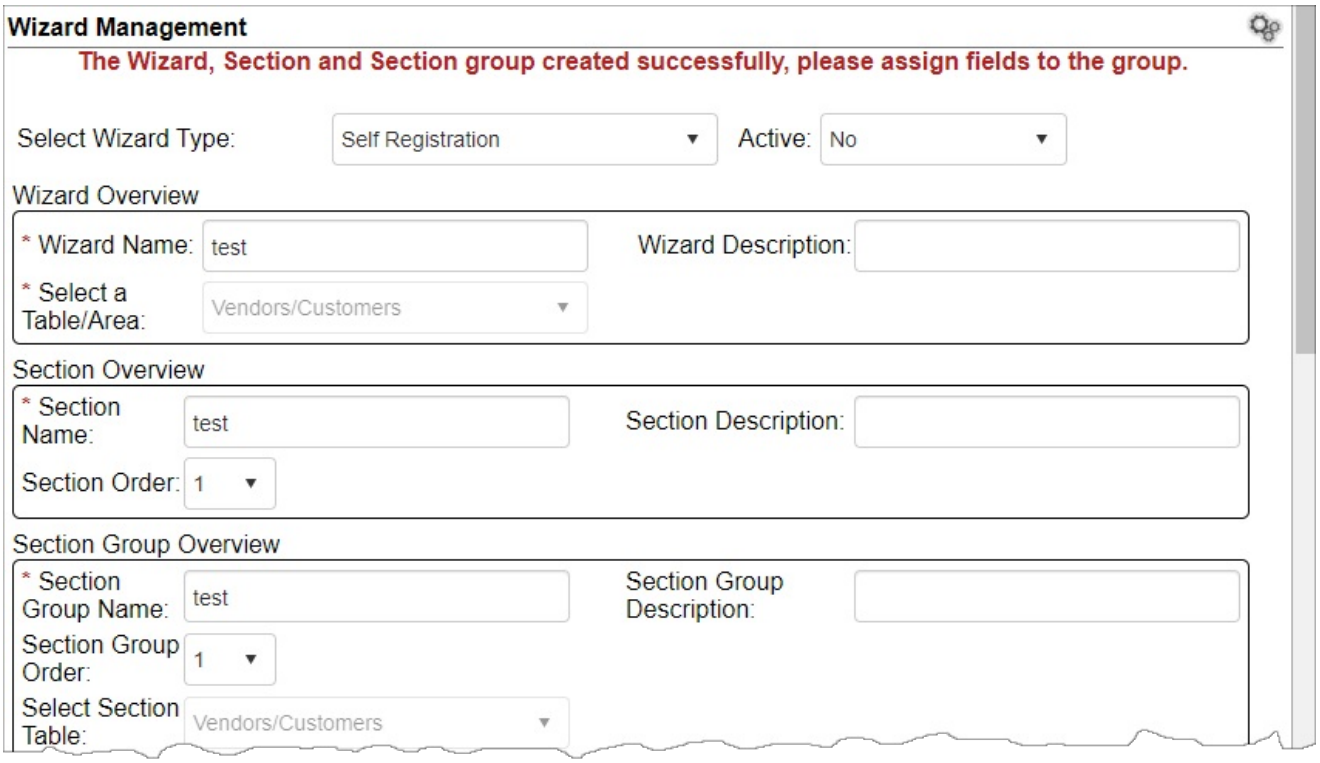
To edit a wizard, click **View Details** on the Wizard Name. From here, the user may do things like change the wizard type (1), add a new section to the wizard (2), and add a new section group (3).

To delete a wizard, click **View Details** on the Wizard Name. Click Delete Wizard (4) under the Actions side menu. If the user wishes to not delete the wizard altogether, but instead delete a section (5)/group (6), they may also do that.

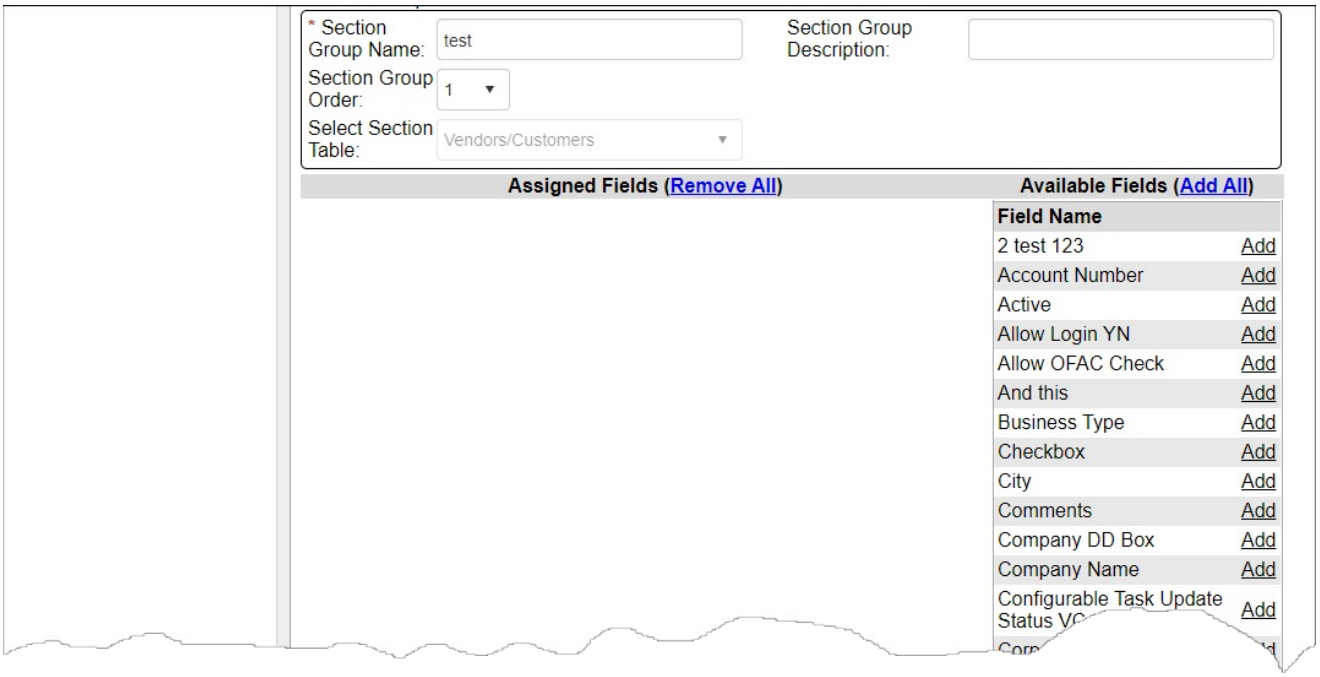


When the user adds a wizard, the following screen is shown:

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Here, the user names the wizard, selects the type, group name, etc. Once the wizard is saved, the user may assign fields to the group:



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5.2 Adding a Contact or User on the Gateway

Adding a Contact/User through the Gateway

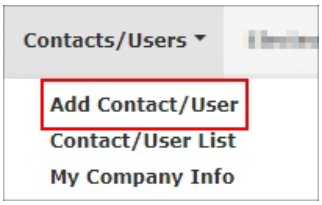
Vendor/Client Gateway: Adding New Company Contacts through the Gateway

If a company Contact's **Contact Details** screen shows the contact as **Is Company Admin** = Yes, the Contact will have the ability to log-in to the Vendor/Client Gateway and manage additional Contacts/Users for his or her organization.

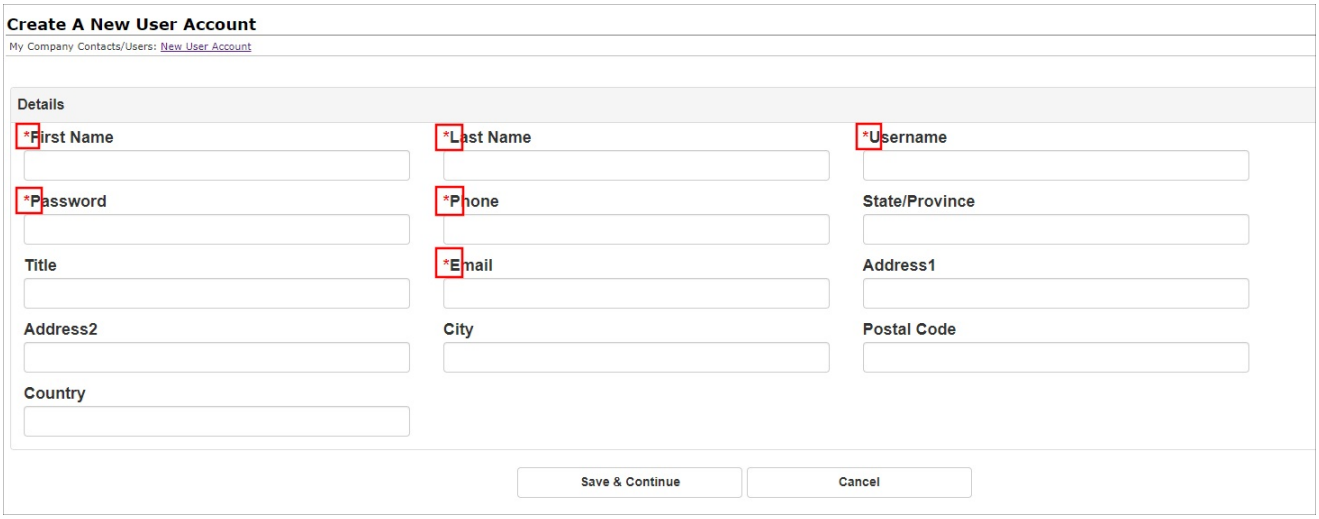
Note: This functionality applies to Company Admins only.

To Add a New Contact/User for Your Company

1. Navigate to **Contacts/Users** – **Add Contact/User** via top navigation menu in the Gateway.



2. Enter the new Contact/User's information into the **Create a New User Account** screen, making sure all required fields are populated.



Note: The screen may be different than pictured above depending on the fields the Core organization has selected/required to be displayed and populated for this screen.

3. Once all necessary and required information has been populated, click **Continue** to save the new Contact/User.

4. The **My Company Contacts/Users Details** screen displays. It contains the new Company Contact's account details.

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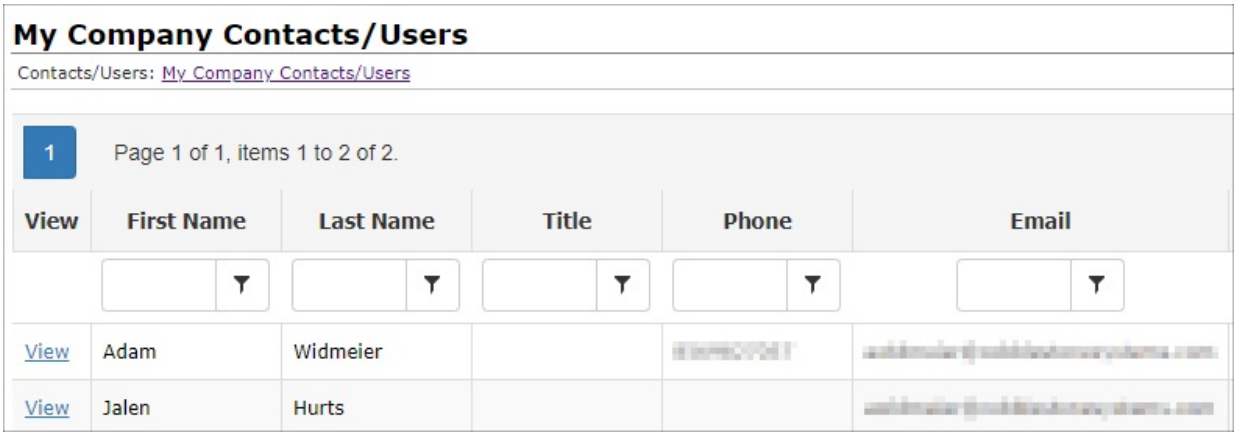
To View a List of Contacts/Users from Your Company

1. Navigate to **Contacts/Users** - **Contact/User List** via the top navigation menu.



2. A grid list opens to display all Contacts/Users for your Company.

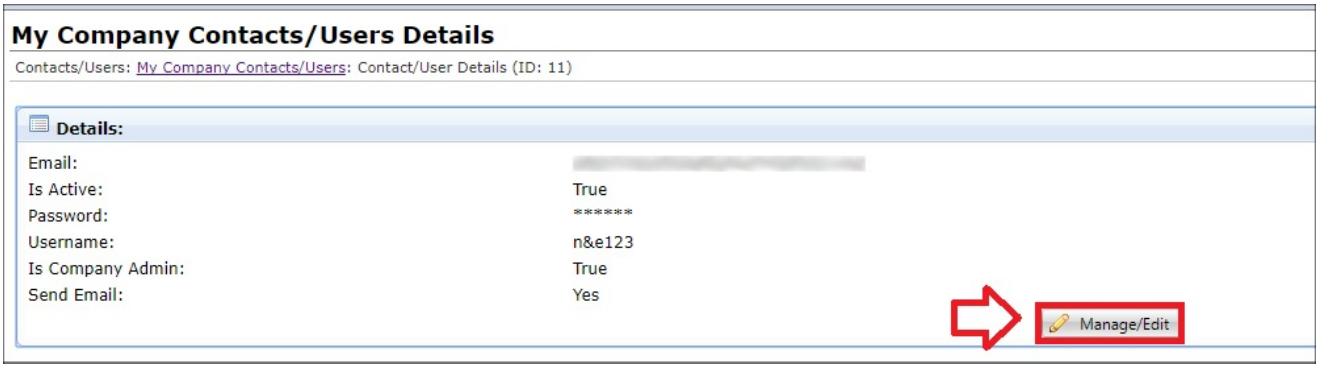
Note: The screen may be different than pictured above depending on the fields the Core organization has selected/required to be displayed and populated for this screen.



3. To view/manage the Contact/User, click **View** for the user to manage.

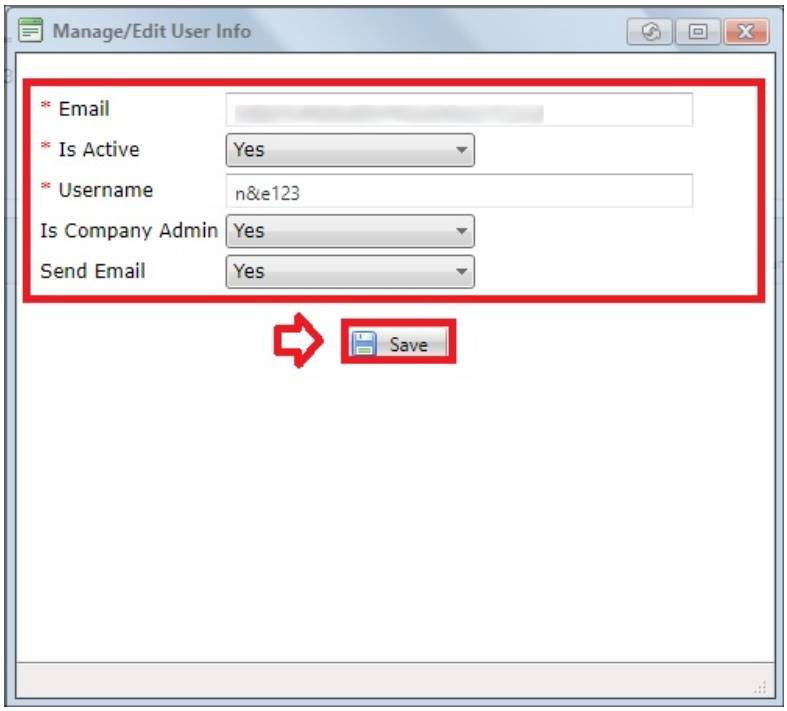
4. The **My Company Contacts/Users Details** screen displays where the details of the Contact/User can be viewed.

5. If the Core Organization has allowed Company Admins to edit **Company Contact Details**, **Manage/Edit** is present under the field values. Upon clicking **Manage/Edit**, a pop-up window for editing fields displays.



6. Click **Save** when all desired fields changes are complete.

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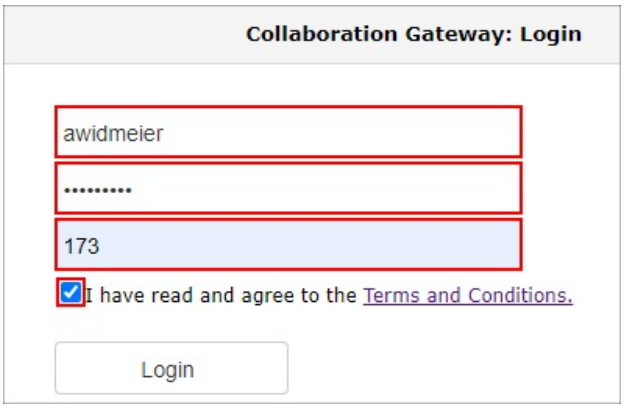
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5.3 Logging In Forgot Password

Logging In/Forgot Password

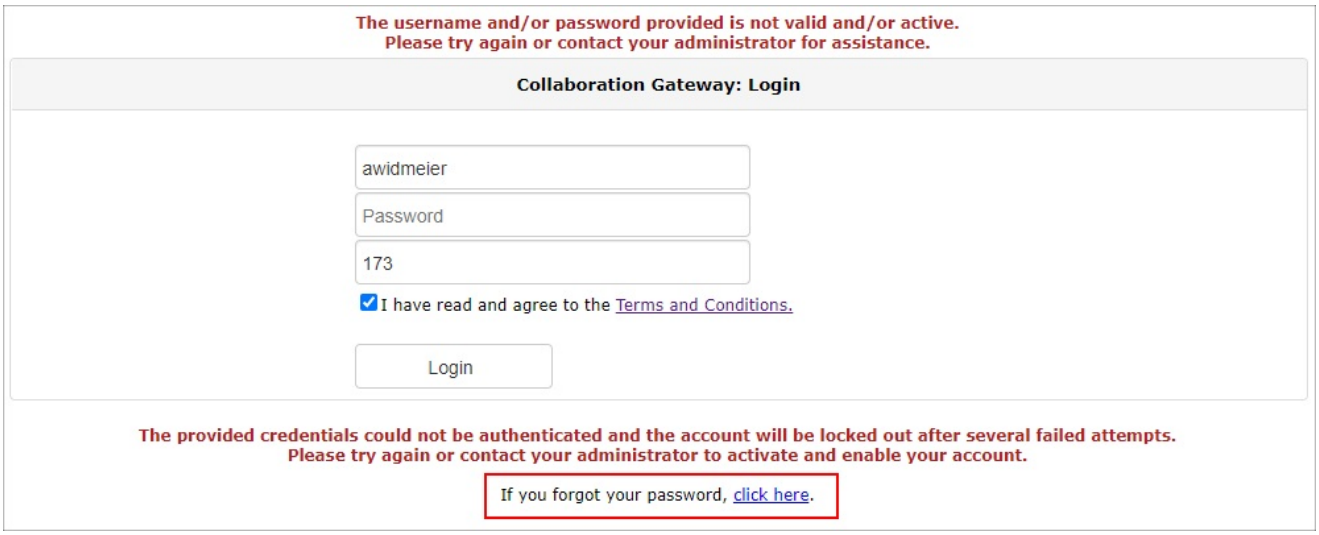
Vendor/Client Gateway: Logging In

To log into the Vendor/Client Gateway, enter your **user name** and **password** along with the **Company ID** provided by the Gateway's Organization.



Forgotten Password

1. If you have forgotten your password for the Vendor/Client Gateway, click the link for **Click Here If you forgot your password**.

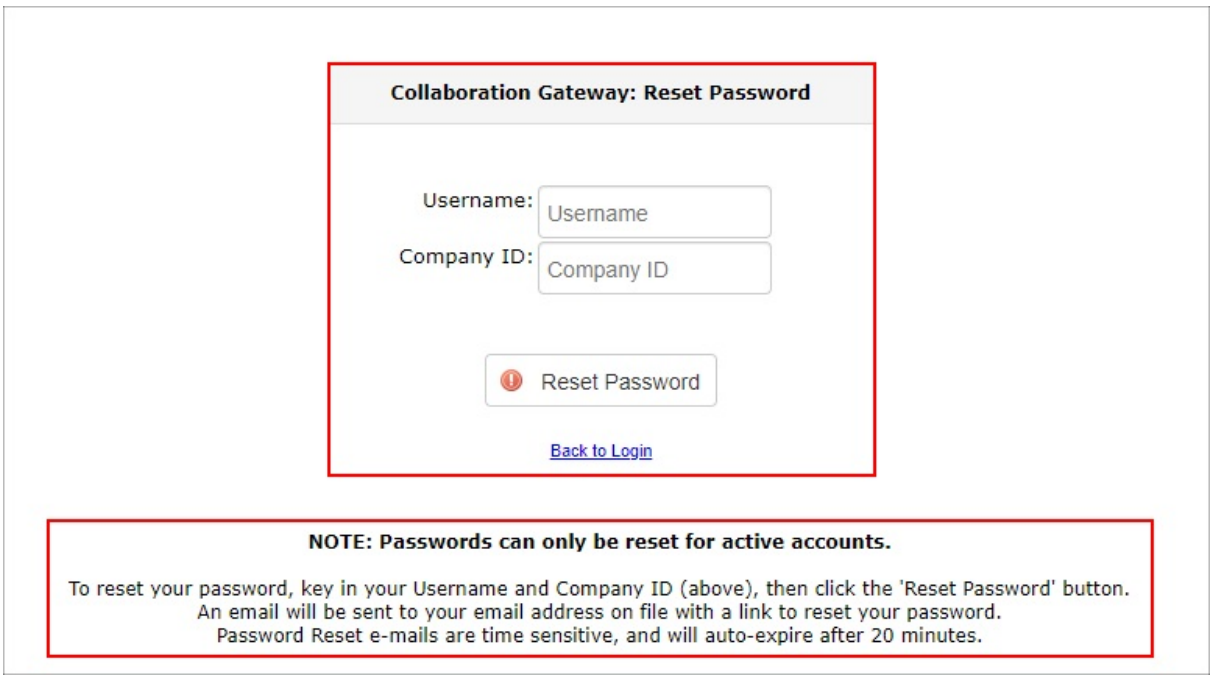


2. The **Forgot My Password** screen displays. Enter your **user name** and **Company ID**.

3. Click **Reset Password**.

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4. An email is sent to the email address on file with a link to reset your password.



Note: Passwords can only be reset for already active accounts.

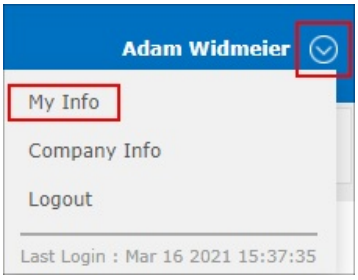
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5.4 Changing Your Password

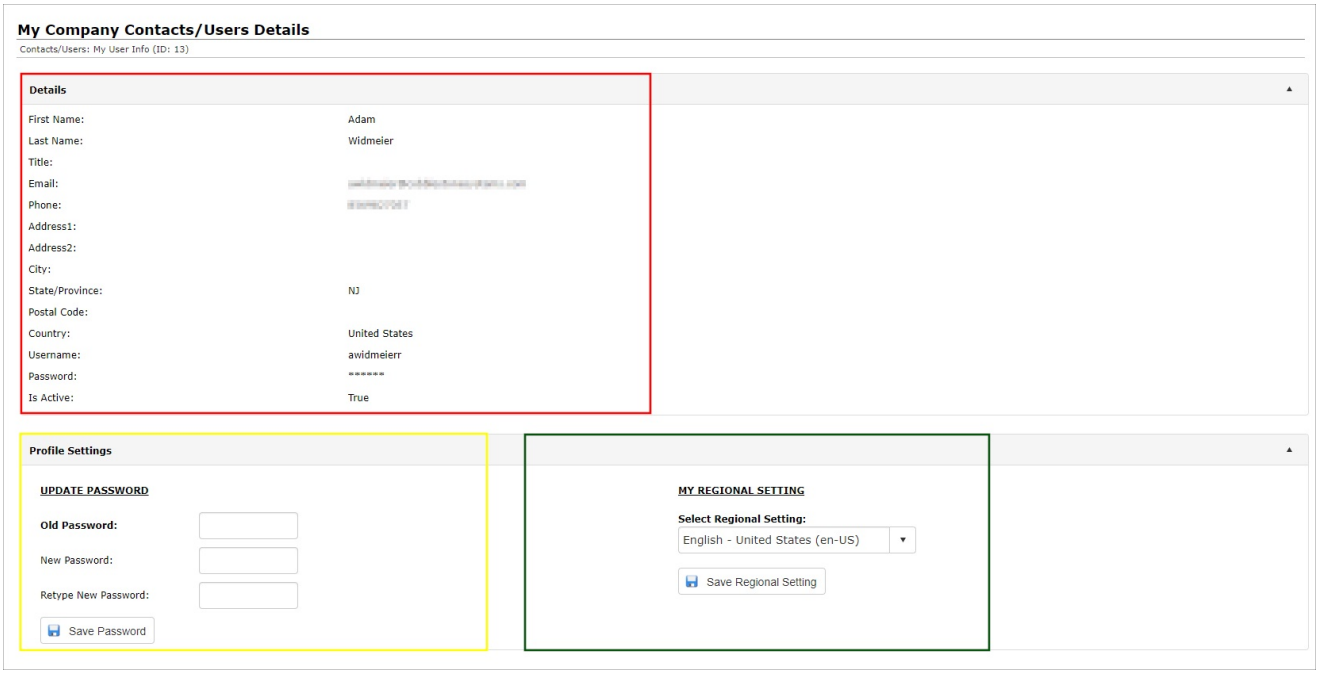
Changing Your Password

Vendor/Client Gateway: Changing Your Password

If the organization has allowed Company Contacts/Users the ability to change passwords, click the **My Info** on the **User Session** side menu.



The **My Company Contacts/Users Details** screen displays where users are able to view the details of their user account, change the password used to access the Vendor/Client Gateway, and update Regional Setting (the Regional Settings sets the date/time formats displayed once logged-in) as necessary.



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5.5 Opting out of Email Messages

Opting out of Email Messages

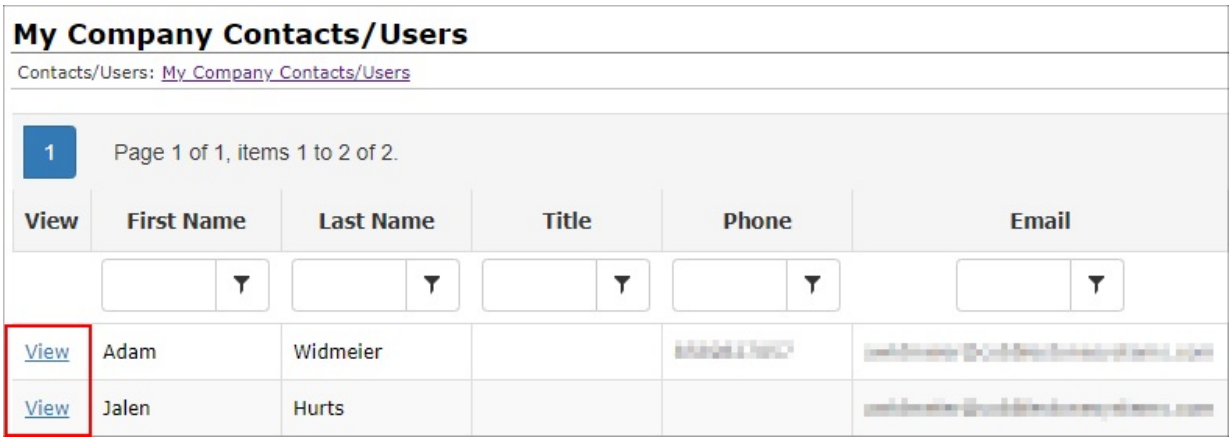
Opting Out of Email Messages

By way of the Vendor/Client Gateway, counterparty contacts can opt out of or into receiving bid newsletters, alerts, and bid opportunities.

1. Navigate to **Contacts/Users - Contact User List**.

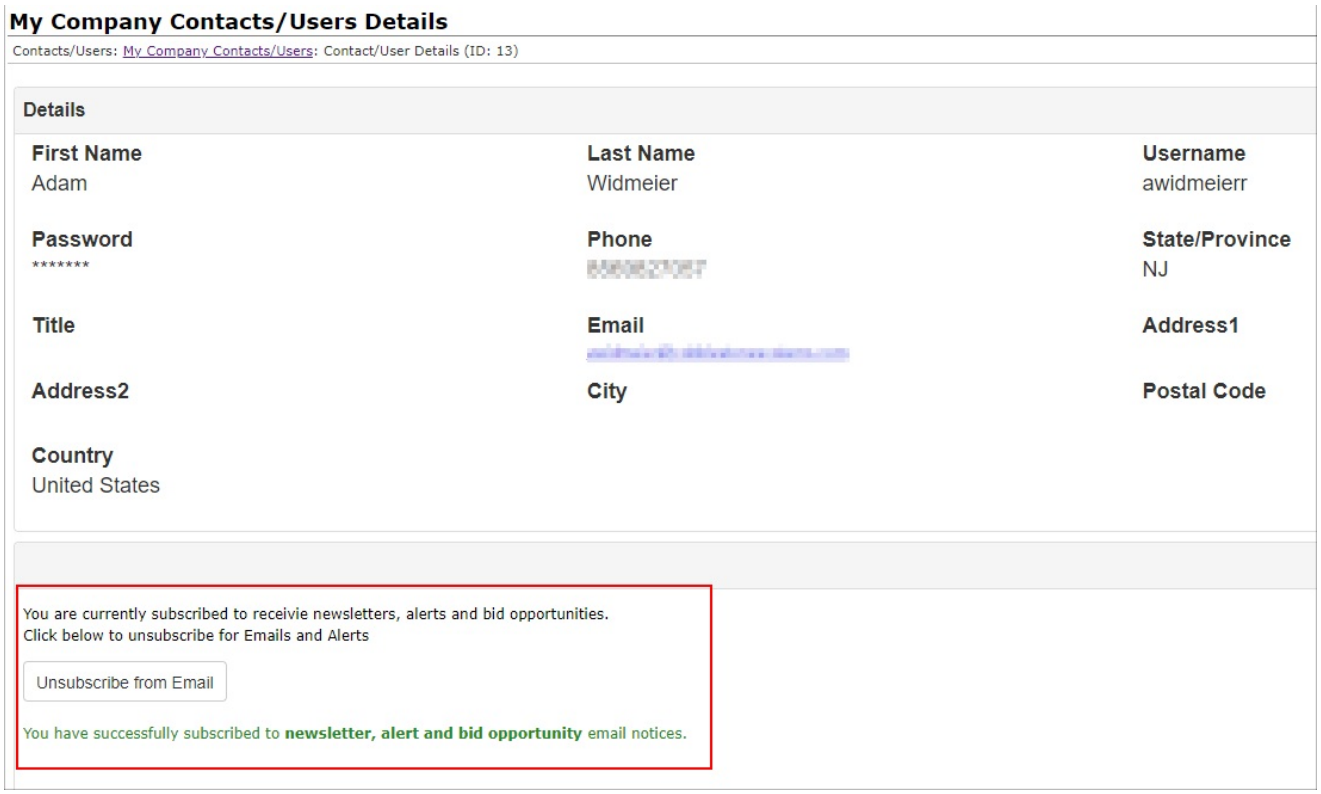


2. Click **View** for your profile line item.

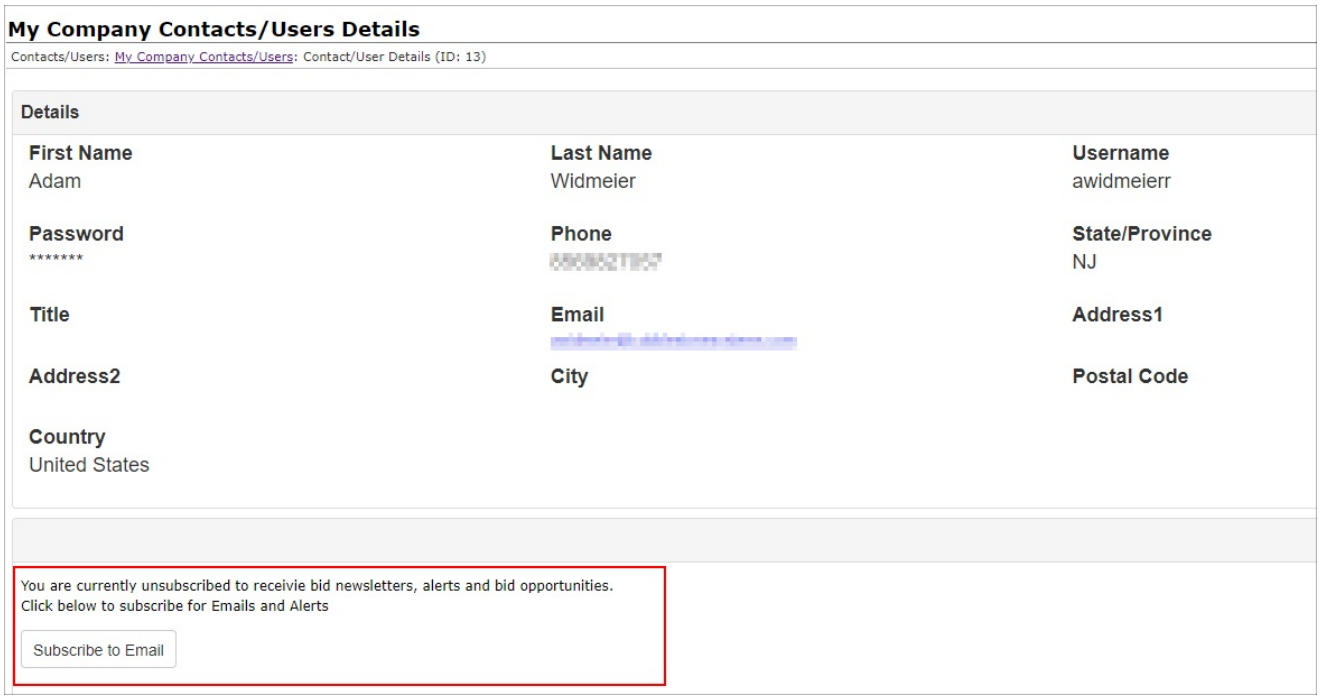


3. To unsubscribe, click **Unsubscribe from Email**.

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4. To subscribe, click **Subscribe to Email**.



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1. Down Selection BAFO

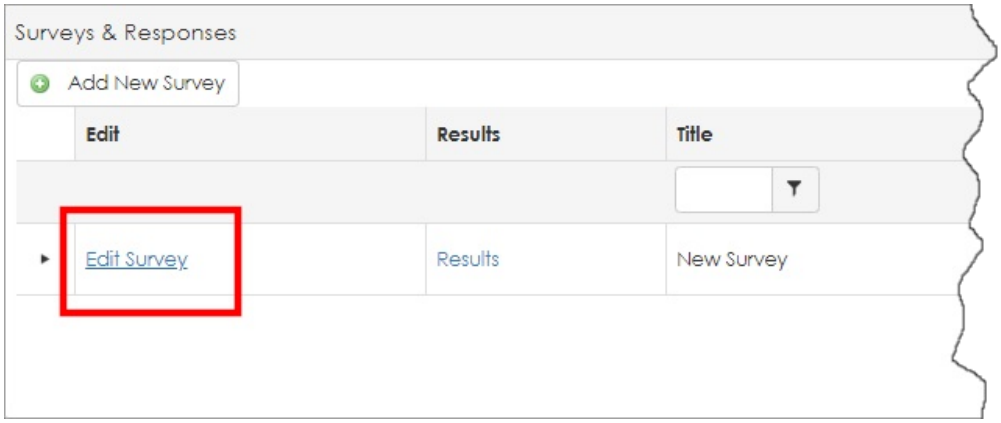
Down Selection/BAFO

Down Selection/Best and Final Offer

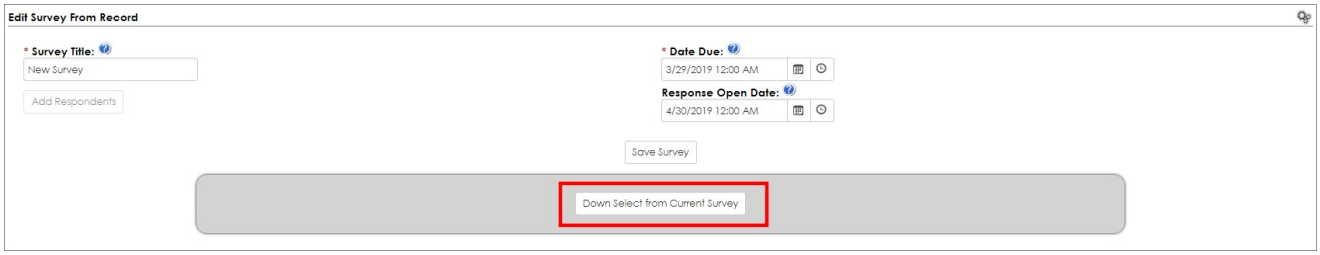
Based on surveys submitted, Contract Insight offers the ability to slim the pool of eSourcing respondents via down selection.

Down Selection

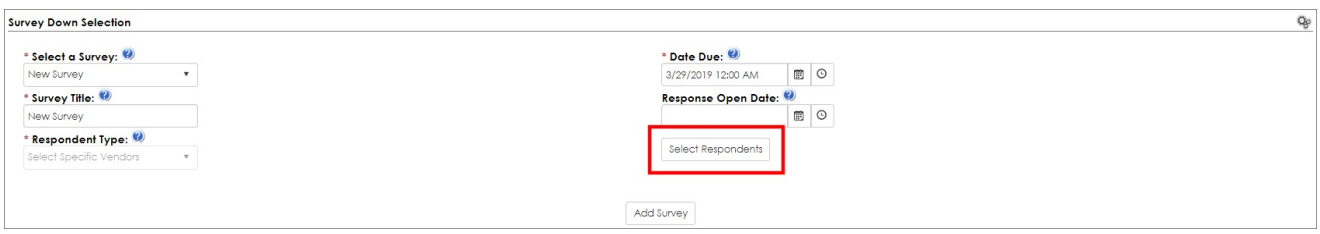
1. Click Edit Survey for a Survey & Response line item. Through this survey, the pool or respondents will be down selected.



2. The Edit Survey from Record screen displays. Click **Down Select from Current Survey**.

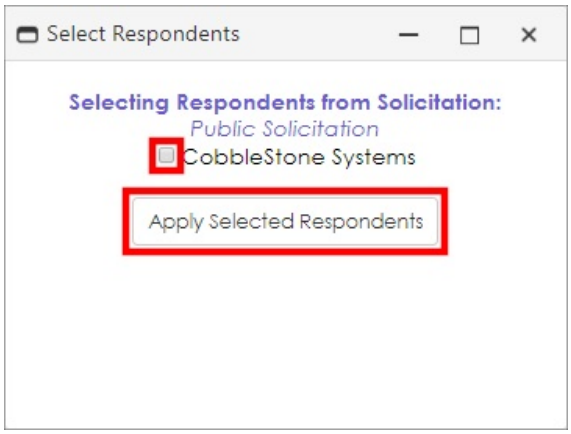


3. The **Survey Down Selection** screen displays. Click **Select Respondents**.



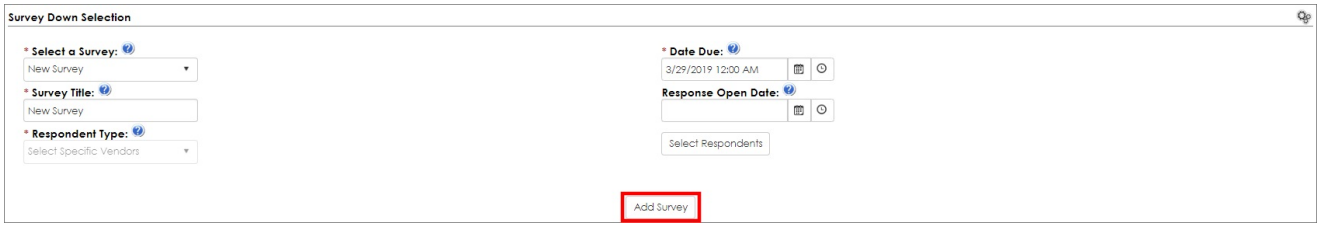
4. The Select Respondents pop-up window displays. Mark the tick box each respondent to down select for the next round.

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5. Click **Apply Selected Respondents**.

6. Click Add Survey. The new survey is sent to each of the selected respondents for completion and submission.



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Overview of Content on the Gateway

Overview of Content on the Gateway

Vendor/Client Gateway: Overview of Content

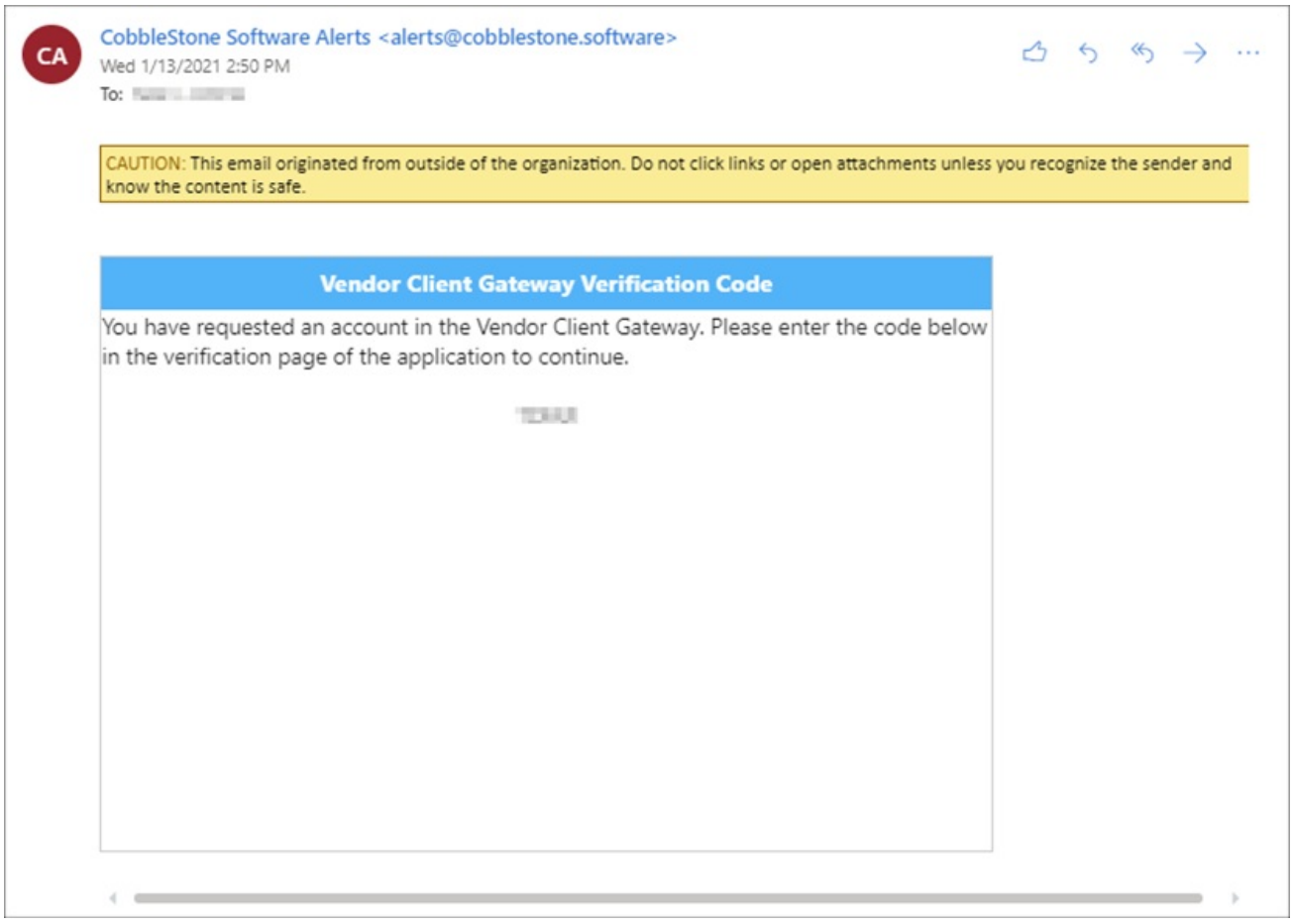
Content displayed on the Vendor/Client Gateway can be viewed by Vendors/Clients who have logged in to the Gateway.

Logging into the Vendor/Client Gateway

Upon navigation to the vendor/client gateway, a user must either register or login with existing credentials.

If enabled by the system administrator, multi-factor authentication may be required. If so, the user may receive an email with a code to be entered.

Once the user logs in with valid credentials, they must follow the prompt, receive the code from their email, and verify login into the system.



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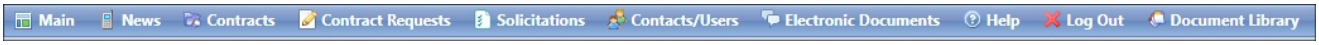
Navigating the Vendor/Client Gateway

Navigation through the Vendor/Client Gateway is performed primarily in two areas:

1. Top Navigation Menu

2. **Page Actions** Menu

1. Top Navigation Menu



Note: Depending on the Gateway organization's configuration settings for menu items to be displayed on the Gateway as well as Gateway Access/Content settings specified, the top navigation menu may look different than shown above.

From the Top Navigation Menu, the following sub-menus may be available:

Main

- **My Home** - opens the logged in **Gateway Welcome** screen
- **Overview**

News

- Opens the **News** screen where you can view the news.

Contracts

- **My Contracts List** - opens the "My Contracts List" screen where a list of contracts your Company has with the organization can be viewed
- **Search All Public Contracts** – opens the **Public Contracts Search** screen where a list of public contracts your Company has with the organization can be viewed.

Contract Requests

- **Request a Contract** - only available to active users, opens the **Create a Contract Request** screen
- **View Contract Requests** - opens the **My Contract Requests List** to display all requests submitted by your Company

Solicitations

- **My Solicitations** - opens the **My Solicitations List** screen to display all Solicitations to which your Company has responded.
- **Search All Solicitations** - opens the **Solicitations Search** screen to display a searchable list of all Solicitations that have been made available to the Gateway
- **Search Public Solicitations** - opens the **Public Solicitations Search** screen to display a searchable list of all Solicitations that have been made available to the Public

Contacts/Users

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- **Add Contact/User** - available only to Company Admins, opens the **Create a New User Account** screen
- **Contact/User List** - opens the **My Company Contacts/Users** screen to display a list of all Contacts from your Company who are users of the Gateway

Electronic Documents

- **My Assignments** - opens the **My Approval & Signature Assignments** screen to display your e-signature and e-approval assignments.
- **My Approval & Signature Settings** – opens the **My Approval & Signature Information** screen where you can edit your **Secure Pin** and **Add a New Signature**.

Help

- Gateway Help - opens the **Help & Support** screen to display help options available

Document Library

- Opens the **Document Library: Standard Files & Attachments** screen where documents given the **Collaboration Type** of Public or Gateway are viewable.

2. Page Actions Menu



Note: Depending on the Gateway organization's configuration settings for menu items to be displayed on the Gateway as well as Gateway Access/Content settings that have been specified, the **Page Actions** menu may look different than shown above.

The **Page Actions** Menu provides Quick Links to the following areas:

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- **My Contracts**
- **Search Public Contracts**
- **Add Contract Requests**
- **My Contract Requests**
- **My Solicitations**
- **Search All Solicitations**
- **Search Public Solicitations**
- **Add New User Account**
- **My Company Contacts/Users**
- **My Company Information**

See the **1. Top Navigation Menu** section above for a brief description of each of the **Page Actions** menu items.

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Contracts & Committals

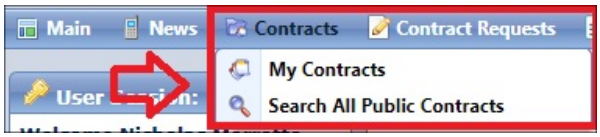
Contracts & Committals

Vendor/Client Gateway: Contracts & Committals

Once a Vendor/Client Contact has logged in to the **Vendor/Client Gateway** and the Contact's login information has been approved by the owning organization of the Gateway, the Company Contact will then be able to view all Contract Records that the owning organization has made available to be viewed.

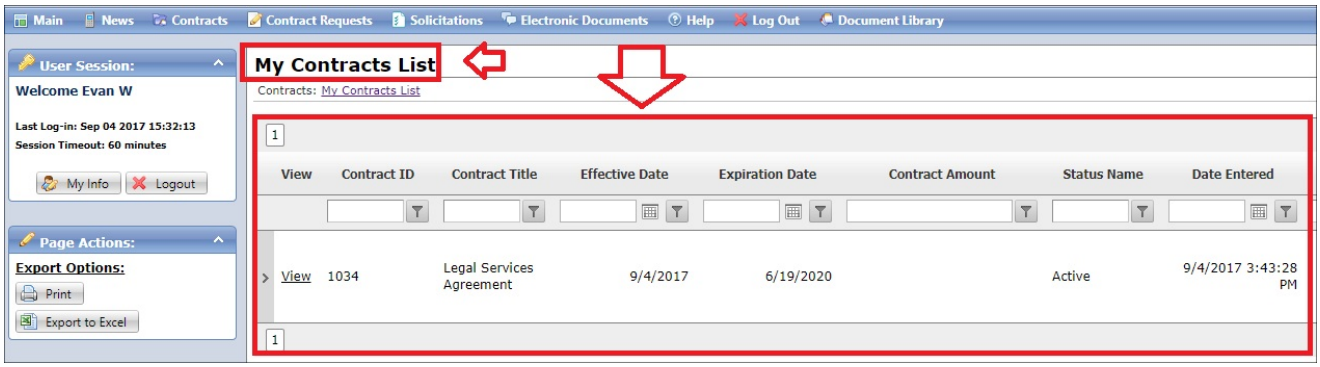
To search and view Contract Records on the Vendor/Client Gateway

Go to the **Contracts** top navigation menu.



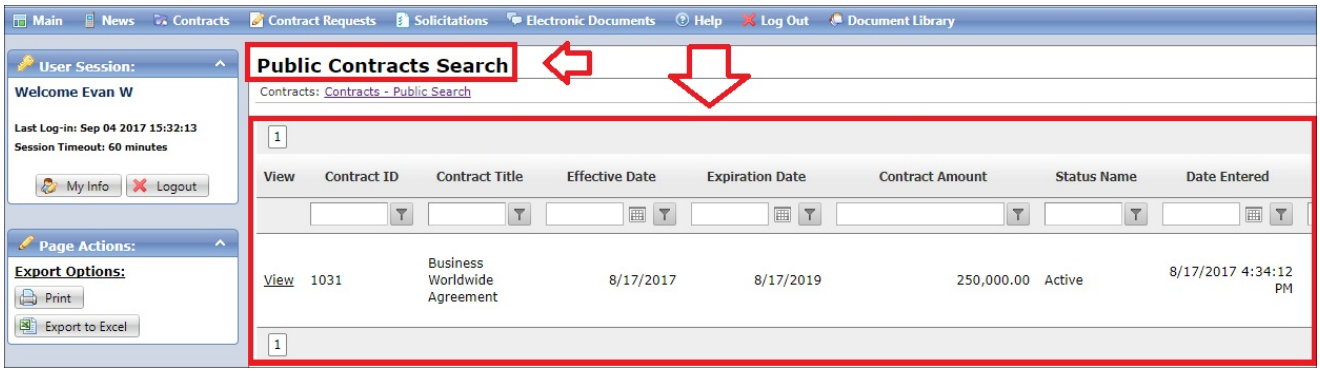
Contracts

- **My Contracts List**- opens the **My Contracts List** screen where a list of contracts your Company has with the organization displays.



- **Search All Public Contracts** – opens the **Public Contracts Search** to view a list of public contracts your Company has with the organization.

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Surveys & Questionnaires

Surveys & Questionnaires

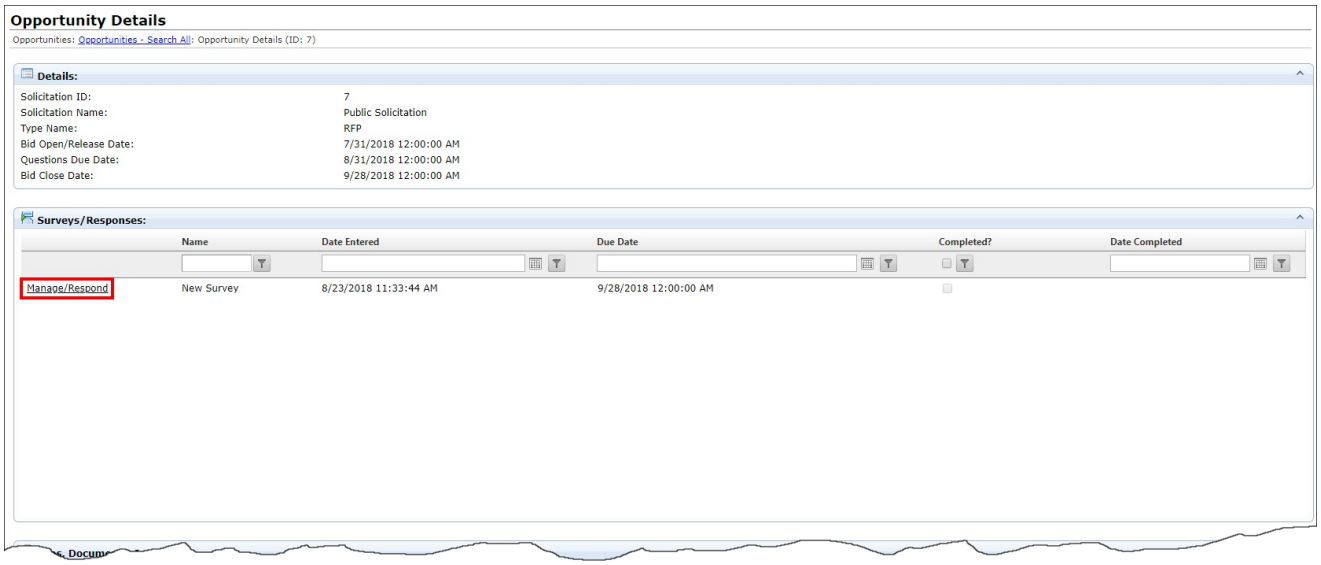
Vendor/Client Gateway: Surveys & Questionnaires

Users of the Vendor/Client Gateway can respond to surveys/questionnaires These surveys and questionnaires are typically collection points for the data and information on questions that respondents must answer for a record (such as questions to answer prior to submitting a bid for a solicitation).

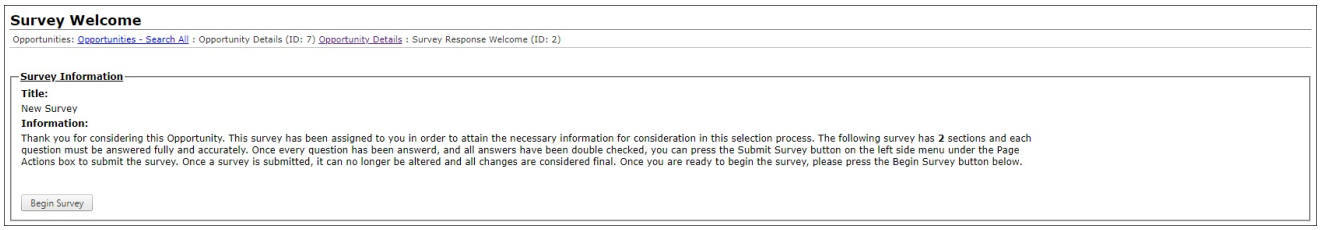
Complete a Survey/Questionnaire

1. Navigate to the record within the Vendor/Client Gateway.

2. In the **Surveys/Reponses** area, click **Manager/Respond**.



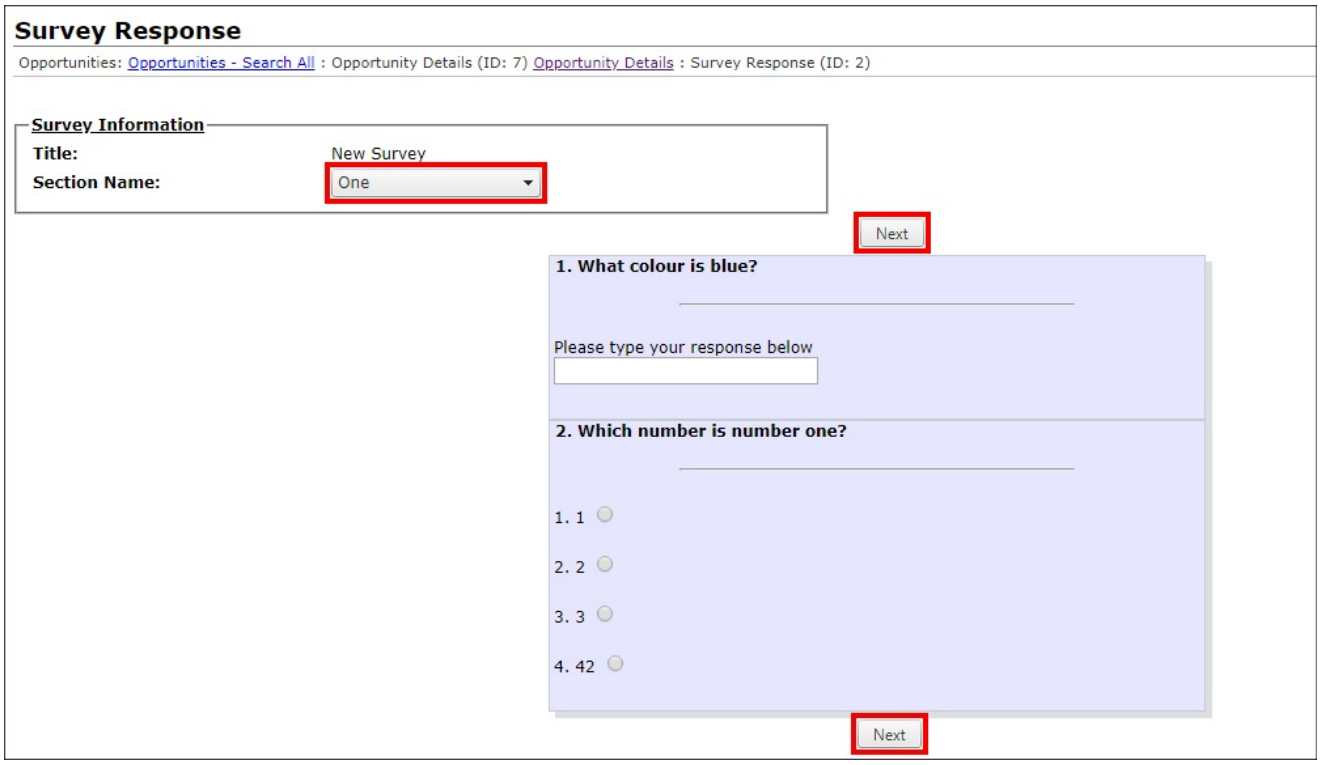
3. The **Survey Welcome** page displays. Read the information available and click **Begin Survey**.



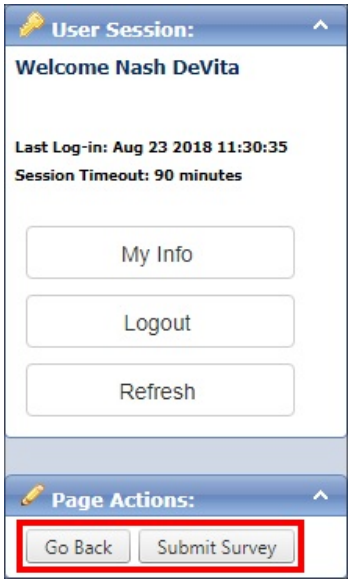
4. Answer the questions displayed.

5. Navigate to other sections of the survey via the **Section Name** pick-list or by clicking **Next** (or **Previous**)

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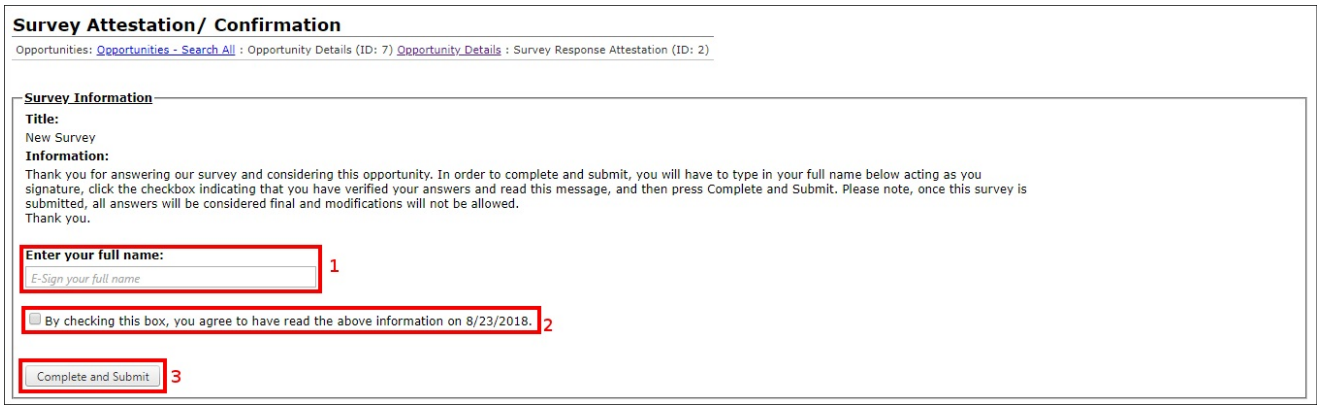


6. When done answering all questions, on the side menu, click **Submit Survey**.

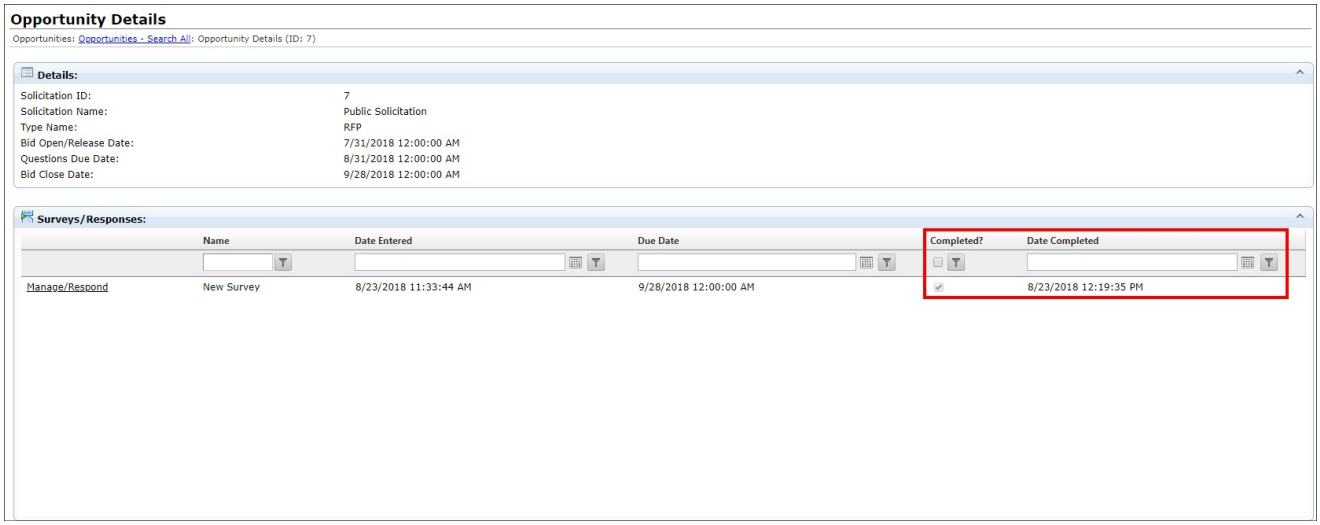


7. When submitting responses, the user is required to attest to the validity of the responses provided. The user must **enter his or her full name**, mark the **attestation tick-box**, and click **Complete and Submit**.

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8. The record's detail screen displays. View the status of the response in the line item for that item.



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Product Service Codes

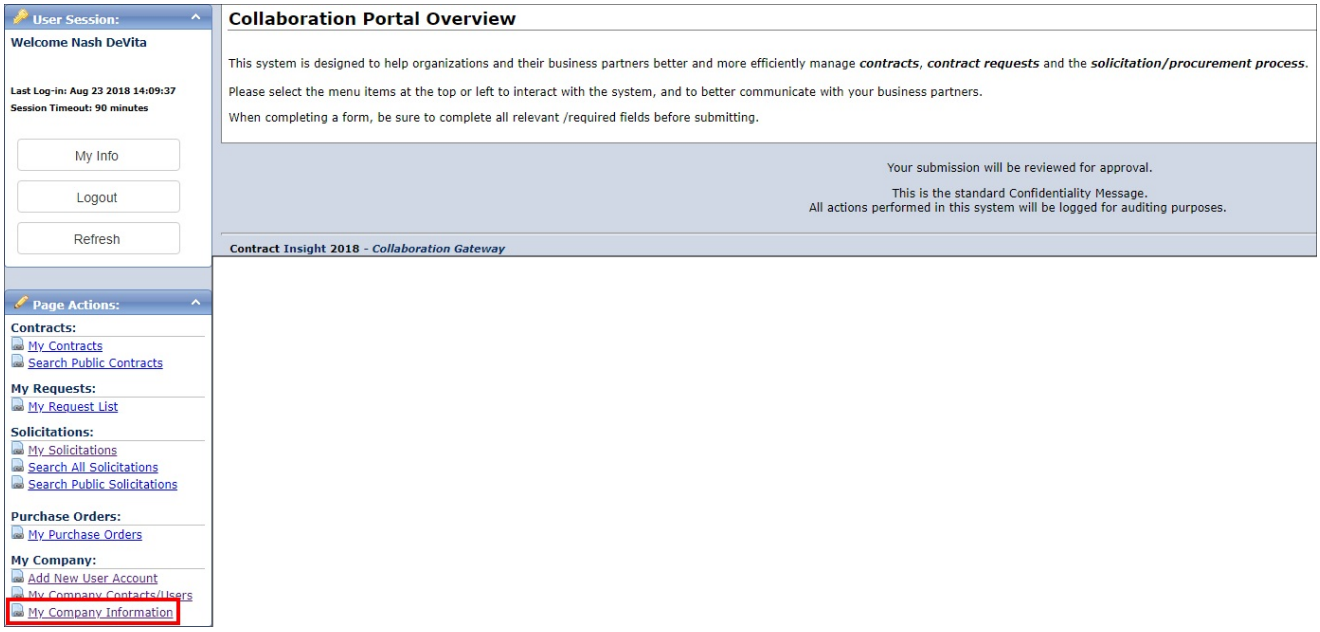
Product Service Codes

Vendor/Client Gateway: Product Service Codes

Vendors/Customers who authenticate/log-in to the vendor client collaboration gateway will have a new area within their **Customer Details** page where they can specify product/service codes that they want to be associated with. Each of the product/service codes a vendor/customer selects will include them on automated email alerts whenever a new public E-Sourcing record is setup with a matching product/service code.

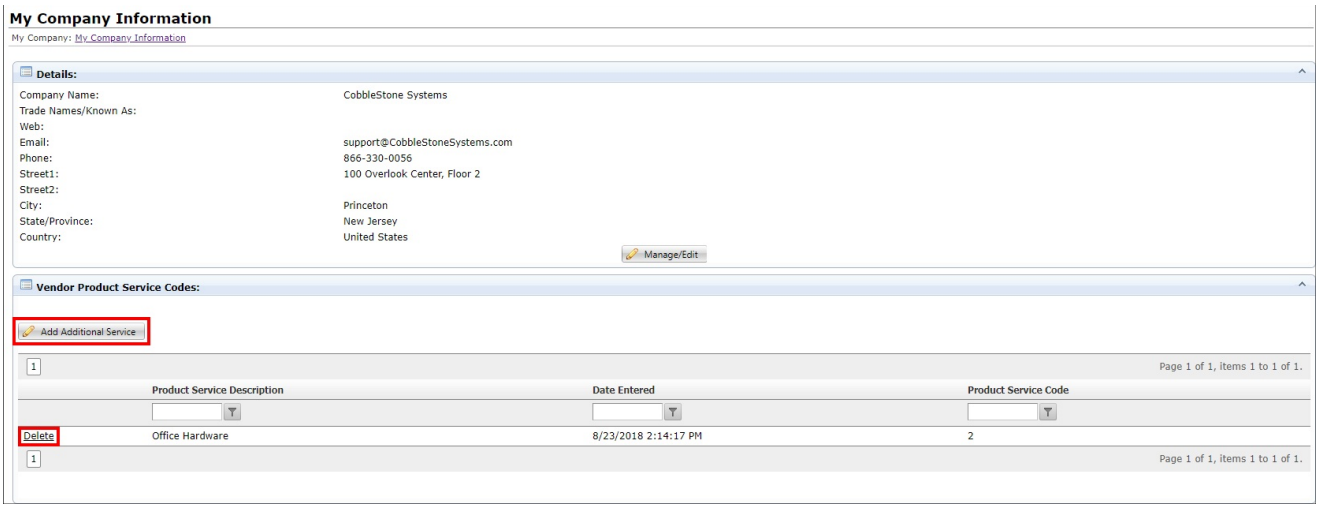
To View the Codes Currently Associated

1. Once logged into the Vendor/Client Gateway, on the side menu, click **My Company Info**.



2. On the My Company Information page, a list of all currently assigned Product/Service Codes displays in the **Vendor Product Service Codes** section.

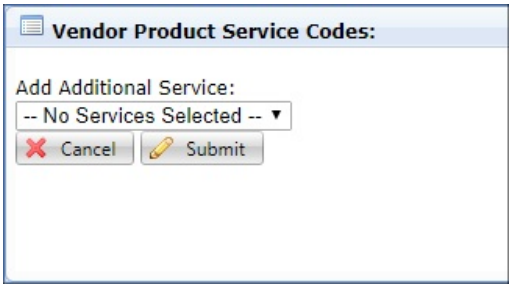
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To Add a New Code

1. Click **Add Additional Services**.

2. The **Add Additional Service Codes** prompt displays. Open the **Add Additional Service** pick-list, select the appropriate code, and click **Submit**. To abort the addition of a new code, click **Cancel**.



To Remove an Existing Code

Click **Delete** for the line item to be removed.

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Viewing Public Solicitations

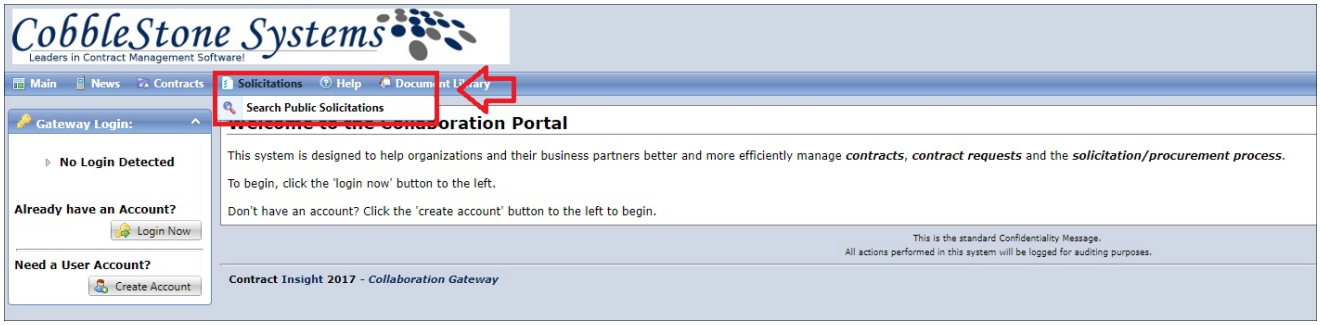
Viewing Public Solicitations

Vendor/Client Gateway: Viewing Public Solicitations

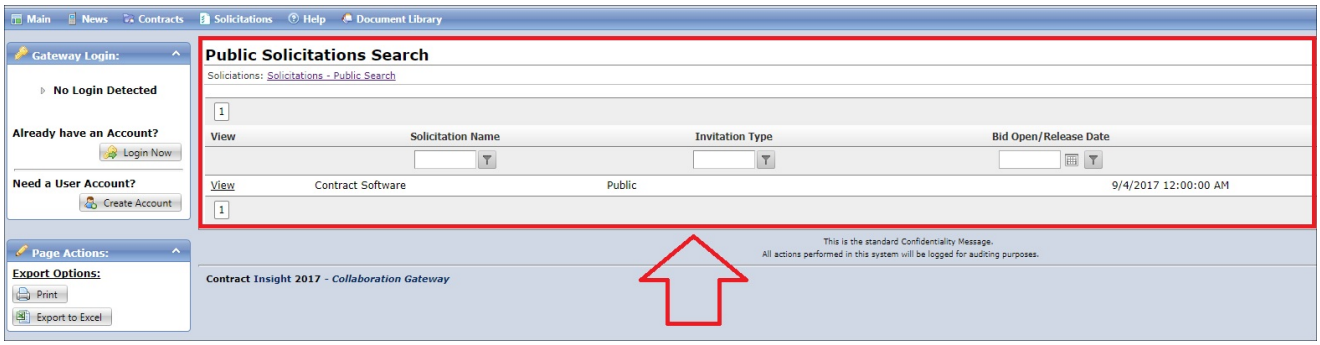
For Solicitation Records that have an Invitation Type of Public, these can be viewed by the public through the Vendor/Client Gateway's **Public Search**:

Accessing Public Solicitations:

1. Go to the **Solicitations** top navigation menu from the Vendor/Client Gateway's main page.



2. Click the **Search Public Solicitations** menu option to view all Solicitation Records marked as Public.

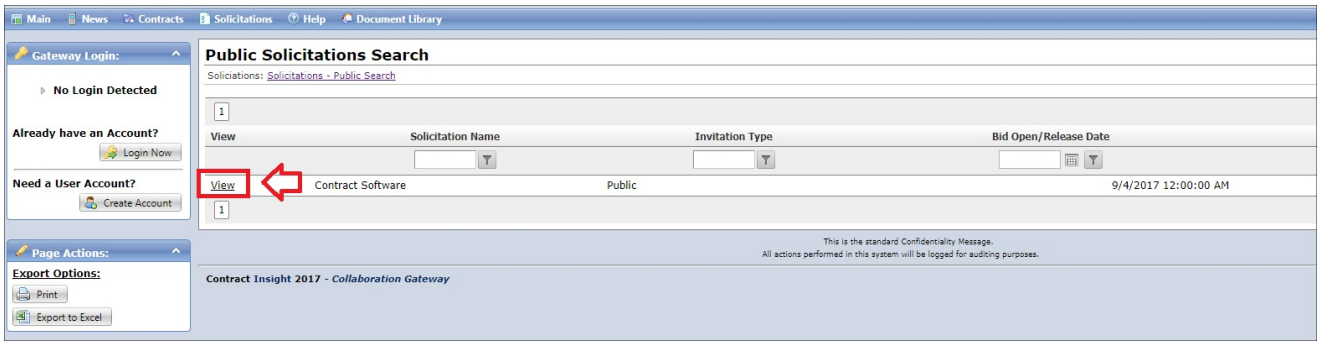


Note: Public Solicitations are visible to potential bidders prior to the **Bid Open/Release Date**.

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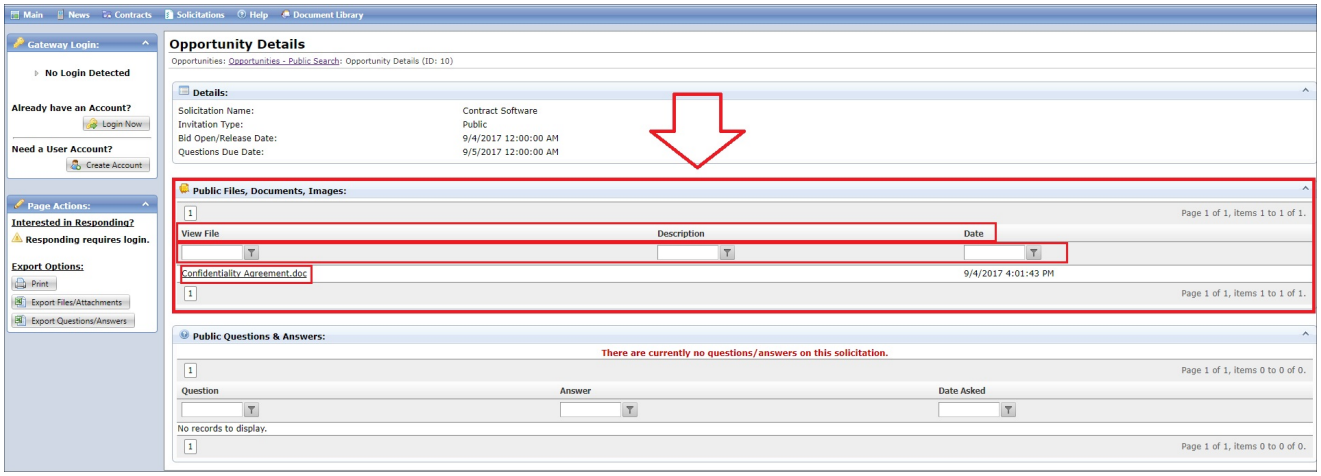
Viewing Public Solicitations

1. Click **View** for the Solicitation Record line item to view its details.



2. The **Solicitation Details** screen displays where any Solicitation Details fields that have been specified to be displayed on the Public portion of the Gateway will show with any information that the Solicitation Record contains.

Viewing Public Solicitation Files

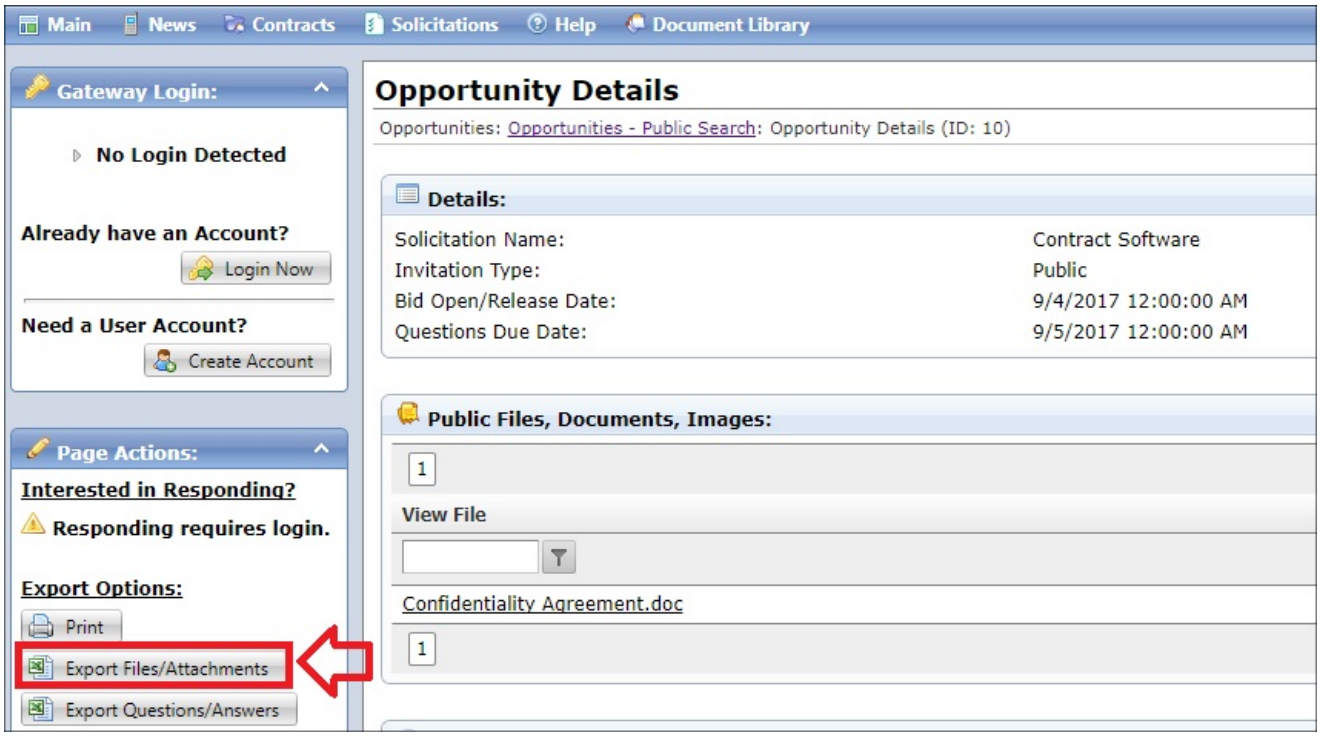


To sort the grid displayed, click the Column name by which to sort (once to sort ascending, a second time to sort descending, and a third time to remove the sort order).

To Filter the gird displayed, enter a keyword(s) into the **Filter text box** for the field by which to filter and then click the **Filter Icon** to select how the grid should be filtered based on the keyword(s) entered.

To open/view an attachment, click the attachment's name and proceed to open/download the file.

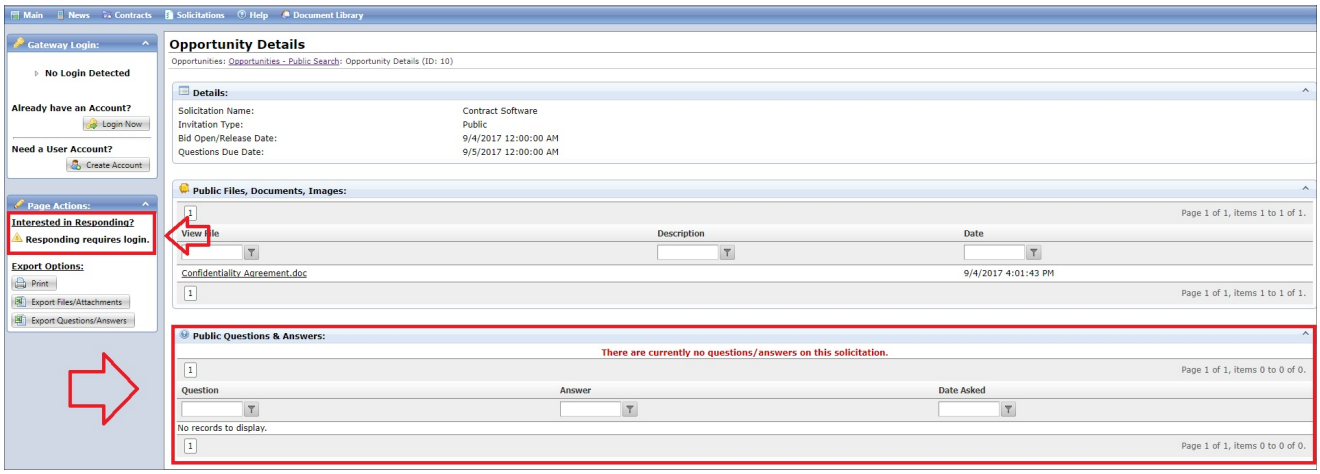
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To export the Files/Attachments, click **Export Files/Attachments** on the side menu to export the Files/Attachments grid to Excel.

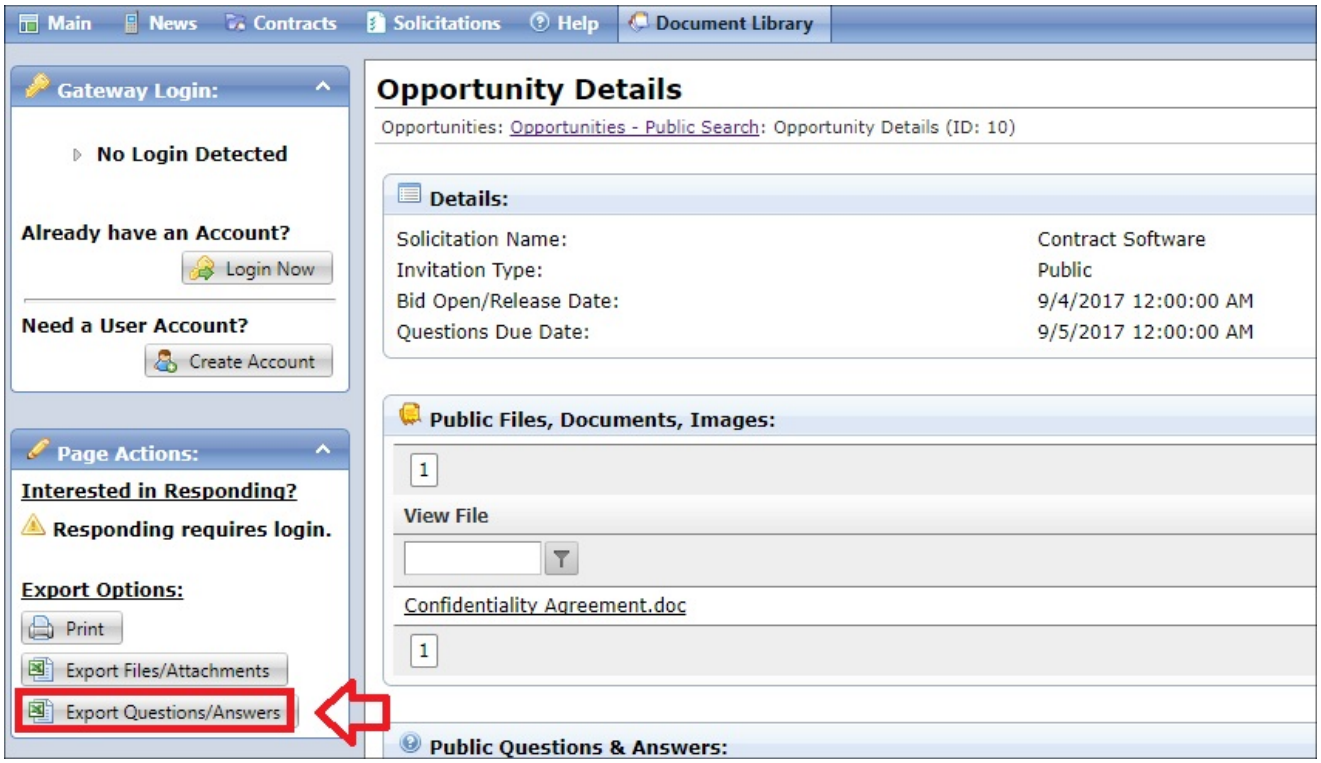
Submitting Questions

Questions about Public Solicitations can only be submitted through the **Vendor/Client Gateway** once the Vendor/Client has logged in and been authenticated.



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To Export the grid of Questions & Answers that have been submitted, click **Export Questions/Answers** on the side menu.



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Digital vs. Electronic Signature

The Difference Between Digital & Electronic Signatures

Electronic Signatures

An electronic signature (or e-signature) is an electronic signing process that functions as a means of accepting an agreement or contract. Electronic signature software can employ a wide variety of standard electronic authentication methods to confirm signatory identities - such as email address, company ID, password protection, and a secure PIN. Proof of signing can be indicated with a secure process that includes an audit trail.

Digital Signatures

Digital Signatures are different from electronic signatures. Digital Signature solutions leverage certificate-based digital identification for validation of document integrity. These certificates are often issued by a certificate authority (or CA) and provide proof of signing with trusted timestamps and through the use of an encryption to bind a digital certificate associated with a signature to the corresponding document. Essentially, digital signature certificates serve to guarantee the document has not been tampered with after the electronic signature has been applied. Contact CobbleStone to learn more about Digital Signature offerings.

Qualified Signatures

Qualified signatures differ from both Electronic and Digital Signatures. Typical Qualified Signatures offer a higher level of identity review and are not included in IntelliSign or CobbleStone Electronic Signature offerings. Contact CobbleStone to learn more about Qualified Signature offerings.

Since the advent of the Electronic Signatures in Global and National Commerce (ESIGN) Act of 2000, both digital and electronic signatures have been considered to be as legally binding as handwritten, "wet" signatures in the United States. Since electronic signature laws vary by country and legal jurisdiction, **check with your attorney or corporate legal counsel for any legal advice regarding the use of electronic or digital signatures.**

To view CobbleStone's Electronic Signatures page, click here.

To view CobbleStone's Digital Signatures page, click here.

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