COBBLESTONE
SOFTWARE

CONTRACT INSIGHT
RELEASE NOTES

Version 17.10.0 (rev 211008)

October 13, 2021

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Release Notes Overview

CobbleStone Software's Contract Insight application release notes are meant to assist our clients and users in obtaining a high level or overview understanding of the new features, enhancements and issue resolutions associated with each released version of the application.

Release Version Information

The high-level information regarding this version is detailed below:

Release Version Number	Client Release Date	Release Type *(from prior release)*
17.10.0 (Rev 211008)	Wednesday October 13, 2021	Update

Version Numbers, Segments & Types

The initial questions most users ask are:
- What exactly do the version numbers mean?
- What does the release type mean?

CobbleStone Software's development of Contract Insight follows an industry standard for naming and numbering consisting of **three (3) segments of numbers**, separated by a period. When a new release is deployed, its release type is determined based on what changes, enhancements, issue resolutions or new functionality is included with the new release.

Below is a breakdown of the release version number and release type with these items in mind.

1 First Segment:

The first segment represents the ***system or application number***. This number only changes if there is a major overhaul to the system or application on a whole.

A release altering this segment is an **upgrade** release type.

2 Second Segment:

The second segment represents a ***new major functionality release***. This number only changes if there is new functionality or major enhancements to multiple areas of the system/application.

A release altering this segment is an **update** release type.

3 Third Segment:

The third segment represents the ***patch number***. This number changes with each new patch. The patch refers to targeted enhancements and issue resolutions.

4 Rev:

The rev (revision) represents the ***hotfix***. This changes with each hotfix. The hotfix refers to security updates and issue resolutions.

Core System: Contract Insight

The Core System provides Contract Insight's core components and functionality for full lifecycle management of your organization's contracts and committals.

➤   **New Feature: Notifications Templates Phase II**
Reference #: 211008.486.2499

The second phase of Notification Templates brings several changes to how the Templates function compared to the first phase released earlier this year. Creating and Managing Notification Templates can still be accessed from the Manage/Setup area of the main menu by users with permission.

The look and feel of the emails have been updated with two different formats – one for general emails and one for Task emails.

The Notification Templates now work in conjunction with Workflow Tasks and have been categorized into one of the 6 following areas:
- Contract & Committals
- Employees & Users
- Purchase Orders
- Requests
- Solicitations & Procurements
- Vendors & Customers

Users with permission to create Workflows will also have permission to create Notification Templates. When configuring the Workflow Task, there is a new dropdown field called 'Notification Template' which will list the Notification Templates available for the same module for which the Workflow is configured. Note that a Default Template will be used if no custom Notification Template is available.

When creating a Notification Template, users will be able to:
- Update the image in the email header
- Design the body of the email Use Rich Text formatting
- Include mergeable fields in the Subject and Body of the email
- Include subtables in the Body of the email (which can also be configured to only show the selected subtable under certain conditions)
- Determine which Links/Actions are shown in the email (Record Details, Action Buttons, Task Details, and File links)
- Show CobbleStone Software social media links

Note that additional template areas and further control over the look and feel of the emails will be coming in a future release.

How will this affect users?
End users with permissions will be able to create Notification Templates that can be used when configuring a Workflow Task.

➤ **New Feature:** **Functionality to Auto-create records from a Request**
Reference #: 211008.486.2586 and *211008.486.3095*

Contract Insight now has the ability to automatically create a new Request, Contract, eSourcing, or Vendor/Customer Record based on conditions met in an existing Request record.

Under the Manage/Setup menu, System Administrators can configure Record Flow Templates to determine which conditions need to be met to open a new record and which record type to open. They will also be able to create a Field Override which will replace a value that would otherwise be set when the record is created.

How will this affect users?
End Users are not affected as only System Administrators have the ability to perform this action.

➤ **New Feature:** **Configuration & Metadata Migration**
Reference #: 211008.362.2052

A Configuration and Data Migration script can now be created through Contract Insight's user interface to copy data from one Contract Insight system to another. System Administrators can configure the scripts by going to Manage/Setup > Account Maintenance and clicking Edit Migration Scripts in the side menu. From the Edit Migration Scripts page, a new Script can be created. Each new *Script* will need a *Task* to determine which data type to add, then, each Task will need *Actions* to specify the data to include.

The different data types that can be included in the script are:
- Schema
- Workflow
- Reference and Stand Alone Tables
- Ad-hoc Reports
- Report Designer and Graphical Dashboard Reports
- Records
- Dashboards

The Action configuration screen will pull the available data for the data type selected for the Task. For example, if the Task data type is Workflow, the Action will be to select the Area then the Workflow to include.

After the script has been fully configured, it can be compiled and then exported for importing into the secondary system.

How will this affect users?
End Users are not affected as only System Administrators have the ability to perform this action.

➤ **New Feature: Rebuild Calendar to be Schedule**
Reference #: 211008.486.792

The My Calendar feature within Contract Insight has been rebuilt to function as a Schedule. The new Schedule initially loads all calendar items based on the current month, with record types being color coded. The key along the top of the schedule enables users to show and hide the specific record types as desired. Note that there will be no color for record types that do not have any records.

As with the legacy Calendar, users are still able to filter the results by status, view/modify as Day, Week, Month format, and export the calendar in .vcs or .ics format.

How will this affect users?
End Users will be able to choose which record areas to view on their calendars in addition to limiting by Status and viewing a specific Day/Week/Month.

➤ **Enhancement: Inclusion of the Files/Attachments folder structure when copying a Record**
Reference #: 211008.445.2808

When mapping Files/Attachments subtable fields in the Field Mapper, System Administrators will see a new option for mapping the attachment folder structure. If configured, users will be able to copy the Files/Attachments folder structure when copying a record in Contract Insight. This will maintain the folder structure between copied records so they do not need to be recreated each time.

How will this affect users?
Dependent upon configuration by a System Administrator, End Users with permission to copy a record in the system will have the ability to choose to copy the Files/Attachments folder structure from the parent record.

➤ **Enhancement: Mapping from Requests to Employees via Field Mapper**
Reference #: 211008.416.3314

The Field Mapper functionality has been updated to enable mapping fields from a Request record to an Employee record. This will copy the configured fields when creating a new Employee record from a Request record.

How will this affect users?
End Users are not affected as this can only be configured by System Administrators. If configured, End Users will see field values copied when creating an Employee record from a Request record.

➤ **Enhancement: Copying a record shows mapped subtables as tabs**
Reference #: 211008.416.3315

When copying a record with several mapped subtables, the subtable item selection page has been updated to show as tabs. This enables users to easily see which subtable they're selecting items from instead of scrolling through all subtables on one long page.

How will this affect users?
If subtables are configured for mapping, this enhancement will make it easier for End Users to select the subtable items to copy.

➤ **Enhancement: Expanded assignment of ad-hoc reports**
Reference #: 211008.416.1044

In addition to assigning to individual employees, users with permission are now able to assign Ad-Hoc Reports to Employee Roles/Groups and Security Groups.

How will this affect users?
End Users with permission to create or manage Ad-Hoc reports now have the ability to assign those reports to Employee Roles/Groups and Security Groups.

➤ **Enhancement: Display grid of records linked to a Vendor**
Reference #: 211008.416.2691

As with other areas of the system, the record(s) a Vendor is linked to now show on the Vendor Record. This will enable users to easily see records the Vendor is assigned within Contract Insight.

How will this affect users?
End Users with permission will be able to view which records a Vendor is assigned to directly on a Vendor Record.

➤ **Enhancement: Apply new field to all types (Fields by Type)**
Reference #: 211008.416.3082

A new button has been added to the Field Manager which enables System Administrators to assign the field to all Record Types for the corresponding area of the system. This will make it easier to assign a new field without needing to Manage Fields by Type for each Record Type.

How will this affect users?
End Users are not affected as only System Administrators have the ability to perform this action.

➤ **Enhancement: Add Add/Remove All Columns to Find/Search Manage Columns screens**
Reference #: 211008.509.3458

When assigning columns to a record Find/Search screen, users with permission will now be able to either Add All available columns or Remove All assigned columns to the Find/Search grid. This can be done by clicking the Manage Columns link in the side menu and using the Add All or Remove All links.

How will this affect users?
End Users with permission will be able to Add All or Remove All columns assigned to a Record's Find/Search grid screen via the Manage Columns link in the side menu.

➤ **Enhancement: Temporary User Lockout Configuration**
Reference #: 211008.416.2584

A new option is available for System Administrators to configure a temporary lockout period for users so that system maintenance or other scheduled activities can be performed without users in the system.

There are two steps for configuration. The first is setting the 'Allow Temporary System Lockouts' Config Setting to True. This setting can be found under Manage/Setup > Application Configuration > Config Settings and selecting Security from the dropdown. Once that is set, System Administrators can go to Manage/Setup > Application Configuration > Temporary System Lockout to configure the lockout.

How will this affect users?
End Users are not affected as only System Administrators have the ability to perform this action.

➤ **Enhancement: Adjust column widths on Ad-Hoc reports**
Reference #: 211008.416.3131

Users with access to Ad-Hoc reports will have the ability to manually adjust the on-screen column widths after running a report.

How will this affect users?
End Users with access to run an Ad-Hoc reports will be able to manually adjust the column widths on screen.

➤ **Enhancement: Configuration setting to disable/enable Online Document Creation/Editing**
Reference #: 211008.439.3351

System Administrators will be able to disable and enable the ability to create and edit online documents on a Record Details screen. The configuration can be found in the Config Settings under General System.

How will this affect users?
End Users are not affected as only System Administrators have the ability to perform this action.

➤ **Enhancement: New 'Recommended Risk Response Field' on Risk Assessment Ratings**
Reference #: 211008.509.3410

A new multi-line text box named 'Recommended Risk Response' has been added to the Risk Assessment Ratings. The Risk Assessment Ratings can be accessed by going to an existing record and clicking 'Risk Rate' in the side menu.

How will this affect users?
End Users with access will be able to fill out this new field when completing a Risk Rate assessment.

➤ **Enhancement: 'View' link name on Ad-Hoc Reports updated**
Reference #: 211008.337.3610

The link to view the related record on an Ad-Hoc report that has been run was renamed 'View' as some clients may have different wording for the Record Types.

How will this affect users?
End Users will see the updated View link wording after running an Ad-Hoc report.

➤ **Enhancement: Export only filtered Sub Table results in Ad-Hoc Reports**
Reference #: 211008.416.3682

After filtering results in a report with subtables, the Export function will now only export the filtered values as opposed to the entire report. The filters can be reset and re-exported to show all the values.

How will this affect users?
End Users with access will have the ability to export filtered results from an Ad-Hoc Report.

➤ **Enhancement: Maintain filter and sorting results on Contract Find/Search screen**
Reference #: 211008.416.3690

After filtering the grid on the Contract Find/Search screen, the system will retain the filter/sorting results when performing a secondary Search Files or Search Notes on the Find/Search screen.

How will this affect users?
End Users will be able to perform search of Files or Notes without losing the original filter/sorting of the records list.

➤ **Enhancement: Invisible Fields by Security Groups**
Reference #: 211008.509.3598

In addition to the existing Assign Hidden Fields on a Security Group, System Administrators now have the ability to assign Invisible Fields to a Security Group. Users who are part of the Security Group with assigned Invisible Fields will not see the field on Add and/or Edit but any default data assigned to that field from the Field Manager can be used to kick off other processes, such as workflows.

How will this affect users?
End Users are not affected as only System Administrators have the ability to perform this action.

➤ **Enhancement: Add "Company Info" link to Request side menu**
Reference #: 211008.416.3272

A 'View Company Info' link has been added to the side menu of the Request Details record. Similar to the Contract Details side menu, clicking the Company Info link will direct the user to the Vendor record of the Company assigned to the Request. Only users with permission will be able to view the Vendor record.

How will this affect users?
End Users with permission will be able to view the Vendor record of the Company assigned to a Request.

➤ **Resolution: Employee Permission Record Check Buttons Are Not Accounting for Security Groups**
Reference #: 211008.416.3295

System Administrators noted that the Employee Permission Record Check button was not accounting for users who could View/Edit a record as part of a Security Group. This has been updated to show users with direct permission as well as those with permission via a Security Group.

➤ **Resolution: Prevent Download permission not included on File Preview**
Reference #: 211008.509.3308

Users assigned the Prevent Download permission (directly or as part of a Security Group) still had the ability to download the document when viewing the file using the Preview functionality. This has been updated so the permission accounts for users Previewing a document and any icons related to the ability to download and/or print a document from Preview have been removed/disabled.

➤ **Resolution: OAuth Callback and Token Expiration Date Formatting**
Reference #: 211008.362.3309

The token expiration date was passing incorrectly for users with alternate date formats. This has been updated so that, regardless of the user's date formatting, the system will convert it to the format needed for determining whether the token has expired.

➤ **Resolution: Unable to edit the Details tab on a Workflow**
Reference #: 211008.439.3318

The functionality that allows users with permission to edit the Name and Options tab in the Workflow configuration was inadvertently removed. This has been resolved and the details can now be edited as expected by users with permission.

➤ **Resolution: Ad Hoc Reports 'Export All' button only exporting 20 rows**
Reference #: 211008.416.3360

When creating an Ad-Hoc Report with a sub-table, users were finding that the 'Export All' function was only exporting 20 rows of data. A resolution was implemented allowing all the available data to be exported as expected.

➤ **Resolution: Users unable to delete stand-alone tables**
Reference #: 211008.439.3397

Users with permission were unable to delete a stand-alone table via the Field Manager. This update resolved the issue and enables users with permission to remove a stand-alone table, when needed.

➤ **Resolution: Request List Page Showing Inaccurate Department Results**
Reference #: 211008.416.3408

The Request List grid was showing the Department for the employee assigned to the Request as opposed to the Department selected on the Request. This has been resolved so the Department displayed in the Request List grid is the one assigned to the Request itself.

➤ **Resolution: Account Inactivity Process**
Reference #: 211008.509.3428

System Administrators noted that the Account Inactivity configuration was not considering users who had never logged into the system. This has been resolved so that users that have not logged into their account at all or for the specified number of days are locked out of the system.

➤ **Resolution: Add Contact button not appearing on Vendor Details page for users assigned via a user-defined permission**
Reference #: 211008.416.3456

After configuring a user-defined permission, users assigned that permission were not seeing the Add Contact button as expected on the Vendor Contacts table of the Vendor Details page. This has been resolved so the button appears as expected.

➤ **Resolution: Clause Library in Online Document Editor Breaks with Certain Characters**
Reference #: 211008.416.3561

Some characters copied from an outside document to the Clause Library within Contract Insight were being recognized as special characters due to the original document's formatting. The Clause Library was not able to read these characters, causing the library to not function properly. A fix was implemented to account for those special characters.

➤ **Resolution: Assigned Ad-Hoc Reports on the Employee Details pages**
Reference #: 211008.362.3584

Some users were seeing an error when attempting to assign Ad-Hoc Reports from the Employee Details page. This has been resolved so Ad-Hoc Reports can be assigned as expected.

➤ **Resolution: Users can type into values on Standard Drop Down fields**
Reference #: 211008.439.3583

Users were able to manually type into standard drop-down menus, specifically when the first '--- Select One ---' option of the menu is selected. This is not an expected action in Contract Insight and was corrected.

➤ **Resolution: Update to default Duplicate Record Check wording**
Reference #: 211008.509.3596

A grammatical update was made to the default Duplicate Record system notification.

➤ **Resolution: Default values set on conditional fields not visible when field is shown**
Reference #: 211008.439.3605

When a user sets up a conditional field, the default value applied in the Field Manager was reported to not show up in the field on the record. An update was made to this area to ensure the default value is displayed as expected.

➤ **Resolution: Add In-line for Vendor Contact pulling additional details into the original dropdown list**
Reference #: 211008.439.3606

Users with permission adding a new Contact using the Add In-line icon on the Company Add screen found that all details were being pulled back to the Add screen as opposed to just the newly entered Contact name. This has been resolved so just the Contact name is added to the original dropdown list on the Company Add screen.

➤ **Resolution: Merge Clause reference edit window showing incorrect data**
Reference #: 211008.416.3622

When editing a Mergeable Clause, users reported the newly entered details were not overwriting the previous details when saved. A fix was put in place to ensure newly entered details saved as expected.

➤ **Resolution: Ad-Hoc Report Excel exports not including the View link to the records**
Reference #: 211008.416.3658

Exported Ad-Hoc Reports were no longer showing the link the View the related record within Contract Insight. This has been resolved to show the View links in the Excel exported Ad-Hoc Reports when expected.

➤ **Resolution: Track Changes forcibly enabled when merging a Document Template**
Reference #: 211008.337.3665

Users reported that, for certain files, Track Changes was enabled for Microsoft Word documents when performing a Document Merge process on a record. This has been updated to work as expected.

➤ **Resolution: Contract search grid breaks when by file**
Reference #: 211008.416.3675

After searching Files on the Contract Find/Search page, users were unable to change pages on the results grid if multiple pages of results were returned. This has been resolved so the results grid works as expected.

➤ **Resolution:** **Unable to use Enter key to Search for a record when Linking**
Reference #: 211008.509.3723

While searching for a record to link, using the Enter key was not starting the search as expected. Using the Enter key after entering a search term will now start the search for linking another record.

➤ **Resolution:** **Unable to remove last dashboard dock**
Reference #: 211008.416.3738

When attempting to remove the last dock from a System Dashboard, the dock would return when refreshing the page. This has been resolved so the final dock can be removed as expected.

➤ **Resolution:** **Conditional fields not working on Checklist Details page**
Reference #: 211008.439.3745

Conditional fields were not functioning as expected when adding or editing a Milestone/Checklist record. This has been resolved so that conditional fields function as configured in the Field Manager.

➤ **Resolution:** **Custom Ad-Hoc Report Filter Breaks with Date Strings**
Reference #: 211008.416.3742

While creating a new Ad-Hoc Report, reports with the Effective Date entered with the date string ("05/15/2022") would not run. A fix was applied to not inhibit running the report and will show a notification to the user.

➤ **Resolution:** **'Back' link for Contract Attachments not returning users to the Document Toolbox**
Reference #: 211008.337.3757

The 'Back' link within the Document Toolbox modal for 'Lock/Unlock' was not returning users to the Document Toolbox. The link was corrected to appropriately navigate users to the Document Toolbox main page as expected.

Module: Document Collaboration & E-Signature

Optional Add-On Module for the collaboration of documents between internal and external users/participants. This module utilizes E-Approval (Electronic Approval) and/or E-Signature (Electronic Signature) processing to support full online negotiation via a secure online portal.

➤ **New Feature: Online Document Creation and Editing - Document Collaboration**
Reference #: 211008.439.3032

The Online Document Creation and Editing functionality have been extended to Document Templates and E-Approvals.

On the Document Template side, users with permission can choose "Add Web Document" when adding a new document to the Attachments area of the template. The functionality is the same as creating a Web Document directly on a Record with the additional options of adding Mergeable data (Fields, Clause, Static Content, and Subtables) via the COBBLESTONE tab on the editor. Users can also modify additionally attached .docx, .doc, and .pdf files using the online editor.

On the E-Approvals side, the assigned Approver will be able to use the online editor to modify the document directly within the E-Approval gateway during the negotiation process. While being updated, the file will be 'Checked Out' so others cannot edit at the same time. Once finished and saved, the updated document will save as a new version.

For both Document Templates and E-Approvals, the Preview functionality has been updated to the new previewer.

How will this affect users?
End Users with access will be able to use the online document editor to create and modify Document Templates and to modify documents during the E-Approval process.

➤ **Enhancement: Simplified attaching a file to a Record during the Document Authoring process**
Reference #: 211008.416.2591

The process for attaching a document from the Merged Document Templates to the Record's File/Attachments area has been simplified. Users no longer need to check out the merged document prior to attaching. Simply click the paperclip icon next to the file, confirm, and the record will be attached to the Record.

How will this affect users?
End Users with permission no longer need to check out a file prior to attaching to a Record.

➤ **Resolution: Solicitation Respondents fields unavailable for Ad-Hoc Reporting**
Reference #: 211008.416.3319

Fields for the Solicitation Respondents table were not available to add when creating an Ad-Hoc Report. This has been resolved to enable the Solicitation Respondents fields for reporting.

➤ **Resolution: Updating the Approver Participant selecting first name in dropdown list**
Reference #: 211008.337.3311

Updating the Approver Participant within a merged document package was not saving the newly selected participant. This has been updated to ensure the selected Approver saves as expected.

➤ **Resolution: Document Process Manager updated Title not reflected after saving**
Reference #: 211008.509.3672

Updating the title of a merged document process from a record was reverting to the original default title set in the Document Template. This was resolved to ensure updating the Title after merging is saved.

Module: E-Sourcing/Procurement Management

Optional Add-On Module for the creation, management, tracking and monitoring of the lifecycle of E-Sourcing, Solicitations, Procurements, Bids, RFxs (RFIs, RFPs, RFQs) and more.

➤   **Enhancement: 'Return to Survey List' link added to Survey Form Manager's side menu**
Reference #: 211008.416.2749

A link to 'Return to Survey List' has been added to the side menu of the Survey Form Manager – when both adding a new Survey and modifying an existing one.

How will this affect users?

End Users with permission will be able to easily return to the Survey List from the Survey Form Manger pages.

➤   **Enhancement: Deleted Survey Assignment Notification**
Reference #: 211008.416.3536

A new email notification has been added to the Surveys and Questionnaire functionality. When a survey is deleted, an email is sent to the assigned survey recipient(s) letting them know they no longer need to provide a response to the survey.

How will this affect users?
End Users assigned to a Survey will be provided notification that a survey has been deleted.

➤   **Enhancement: Maintain filter and sorting results on Sourcing Find/Search screen**
Reference #: 211008.416.3690

After filtering the grid on the Sourcing Find/Search screen, the system will retain the filter/sorting results when performing a secondary Search Files on the Find/Search screen.

How will this affect users?
End Users will be able to perform search of Files without losing the original filter/sorting of the records list.

Module: Vendor/Client Collaboration Gateway

Optional Add-On Module used to extend the functionality and collaboration scope of Contract Insight by providing a dedicated gateway portal for your vendors, suppliers, providers, clients, customers, respondents, etc. to view and interact with the contracts, solicitations, etc. you have with them.

➤ **New Feature: Submit Files when registering on the Vendor/Client Gateway**
Reference #: 211008.439.3592

Vendors and Customers registering for the Vendor/Client Gateway will now have the ability, if configured, to submit files along with their registration. System Administrators can enable this functionality by going to Manage/Setup > Application Configuration > Config Settings. The 'Allow vendor document upload on account creation.' setting can be found under Vendor/Client Gateway > General and setting to 'true' will allow registrants to upload files with their registration.

How will this affect users?
Registrants on the Vendor/Client Gateway will be able to submit files with their registration if configured.

➤ **Enhancement: VCG-Show locked fields on list screen**
Reference #: 211008.439.3402

Fields marked as locked within the Core system can now be viewed on list screens on the Vendor/Client Gateway if configured to Show On Search.

How will this affect users?
End Users are not affected by this update as only Core system users with access can update fields shown on the Vendor/Client Gateway.

➤ **Enhancement: Cascading Fields functionality added to the Vendor/Client Gateway**
Reference #: 211008.439.3680

The Cascading Fields functionality that is part of the Contract Insight Core system has been extended to the Vendor/Client Gateway. This functionality allows a dropdown field's choices to be filtered depending on the response in a previous dropdown field. Currently, Cascading Fields cannot be configured via the UI and must be configured in the back end.

How will this affect users?
If configured, End Users will be presented with dropdown list choices based on their responses in a previous dropdown field.

➤   **Resolution: Public Contract list showing IDs instead of text value**
Reference #: 211008.439.3615

The list of Public Contracts within the Vendor/Client Gateway were showing ID numbers in fields instead of the corresponding text value for fields such as Contract Type, Category, Supplier, etc. This has been corrected to show the text value as expected.

➤   **Resolution: Workflow not sending notification when a new Request added on the Vendor/Client Gateway**
Reference #: 211008.439.3731

It was discovered that workflows were not being triggered if setup to run automatically for new Requests submitted from the Vendor/Client Gateway. This was resolved so that workflows are able to run within the Vendor/Client Gateway.

Connector: External E-Sign Integrations

Optional Add-On Connector that provides your organization with the capability of electronic/digital signing of documents/contracts. Currently this connector is configured for integrations with DocuSign, AdobeSign, and DocJuris.

➤   **Enhancement: DocuSign Legacy Login Deprecation**
Reference #: 211008.362.3588

DocuSign has depreciated their Legacy Authentication for REST API. This update removes the ability to select the Legacy authentication option if not already configured.

How will this affect users?
End Users are not affected by this update as only System Administrators have access to configure this functionality.

➤   **Resolution: External ESign Controller Issues for /OAuth path**
Reference #: 211008.362.3586

A framework update was needed on the system which caused the navigation for to the 'Manage Authorizations' link to be inaccessible. The path for the link was updated to point to the correct page.

➤   **Resolution: End space added in DocuSign Add Recipient email list**
Reference #: 211008.416.3316

When adding a recipient to the electronic signature process for an attached document, some users found a character space was being added to the end of the email field. This resulted in an error when submitted. A fix was implemented to ensure spaces are removed from this field.

Connector: SMS/Text Integrations

Optional Add-On Connector that provides your organization with the capability of sending SMS notifications for Task Alerts and Multi-Factor Authentication Verification Codes for both the Core System and Vendor/Client Gateway logins. Currently this connector is configured for integrations with Twilio.

➤ **Enhancement: SMS Reporting/Dashboard**
Reference #: 211008.416.3313

The following four new Ad-Hoc Reports have been added to easily view the details of SMS messages sent out by the system for both MFA Requests and Task Notification Emails:
- SMS Messages - View Employee MFA Requests
- SMS Messages - View Vendor Contact MFA Requests
- SMS Messages - View Internal to Employees
- SMS Messages - View External to Vendor Contacts

Each report displays:
- Recipient Name
- Phone Number Message Sent To
- Message Sent
- Date Sent

How will this affect users?
End Users with access to the report will be able to run the report(s) and view the data related to SMS Messages