COBBLESTONE
SOFTWARE

# CONTRACT INSIGHT
# RELEASE NOTES

Version 17.11.0 (rev 220124)

Monday January 24, 2022


CobbleStone Software

IT Department

www.CobbleStoneSoftware.com

Support@CobbleStoneSoftware.com

# Table of Contents

# 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)* |
|---|---|---|
| 17.11.0 (Rev 220124) | Monday January 24, 2022 | 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:** Auto-Process Multiple Files from Drag and Drop Queue in VISDOM
  *Reference #: 220124.362.1183*

  The VISDOM OCR process was updated with the ability to automatically process multiple files when creating a new record using the drag and drop functionality.

  When multiple files are added, the user will be able to choose which file goes through the OCR process first. The remaining files will be added to a virtual queue. Once the first document is finished, the user will be presented with a pop-up enabling them to create a new record with the file, add the file to the previously created record, or to cancel the process all together.

  If the processing is interrupted, users will be provided a 'Retry' link to relaunch the processing from where it left off. If the OCR needs to be restarted, a 'Reprocess' button will be available; allowing users to restart the OCR processing without needing to restart the OCR steps from the beginning.

  ***How will this affect users?***
  End Users with access to create records will have the ability to choose which file runs through the OCR process first when uploading multiple files. They will also have the ability to "Retry" if the process is interrupted.

- **Enhancement:** Configuration for Online Editor's Track Changes functionality
  *Reference #: 220124.439.4111*

  A new configuration setting has been added to force Track Changes by default when loading the Online Document Editor. When set to true, Track Changes will always be enabled by default when creating a new web document or editing an existing document using the Online Document Editor on the Record Details pages. **The default setting for this configuration setting is true** and Track Changes cannot be disabled within the Online Editor**.** To change this setting, go to Manage/Setup > Application Configuration > Config Settings. Under the General group, the *Track Changes enabled when loading Online Document Editor* setting can be found under the Attachments group.

  ***How will this affect users?***
  This configuration only affects the Track Changes functionality when using the Online Editor from a Record Details Page (Files/Attachments area. If the configuration is set to true, End Users will not be able to turn off Track Changes. If set to false, End Users will be able to turn Track Changes on and off.

- **Enhancement:** Online Document Editor Track Changes and Comments
  *Reference #: 220124.439.3899*

  The Online Document Editor has been updated to include adding and viewing both Tracked Changes and Comments. When changes are tracked and the online document is saved, the next editor will not be able to turn off Track Changes until they Accept or Reject the changes. Both Tracked Changes and Comments will be viewable in the Online Document Editor and in the downloaded Word document.

  ***How will this affect users?***
  End Users will be able to track changes and add comments to a document using the Online Document editor.

- **Enhancement:** Audit logging when dashboard is deleted
  *Reference #: 220124.416.4035*

  Deleting a User Dashboard or System Dashboard will now be included as an entry in the system's audit log. Users with access will be able to see when a Dashboard was deleted and who deleted it.

  ***How will this affect users?***
  End users are not affected by this enhancement.

- **Enhancement:** Extend permission for Employees to edit their own Employee record
  *Reference #: 220124.416.3790*

  In addition to Admin and Super users, the existing 'Edit My Employee Record' has been extended to Standard users.

  ***How will this affect users?***
  End users with permission will be able to edit their own Employee record in the system. Only System Administrators can assign this permission to a user.

- **Enhancement:** Ability to rename Security Groups
  *Reference #: 220124.416.2783*

  The ability to rename Security Groups has been added to the system. From the Manage Security Groups page a new Security Group Name field will appear after selecting a Security Group from the dropdown. Simply change the name in the field and click the Rename Group button.

  ***How will this affect users?***
  This does not affect End Users as they do not have the ability to manage Security Groups.

- **Enhancement:** Online Document Editor disclosure
*Reference #: 220124.439.4086*

Each time the Online Document Editor is loaded a new disclosure message will appear. Users will be required to click the 'Continue' button before proceeding to the Online Editor.

***How will this affect users?***
End Users with the ability to use the Online Document Editor will be required to click 'Continue' on the disclosure message.

- **Enhancement:** Additional columns in Survey List and Question Bank grids
*Reference #: 220124.416.4061*

The Survey List and Question Bank grids have been updated to include the following columns: Entered By, Date Created, Updated By, Date Updated. These additions will enable users to see who created and updated surveys or questions and when.

***How will this affect users?***
End Users are not affected as only System Administrators have access to the Survey List and Questions Bank.

- **Enhancement:** Ability to turn off the header image in System generated emails
*Reference #: 220124.486.3930*

System Administrators now have the ability to turn off the header image in system generated emails from Contract and eSourcing emails (e.g. Contract Expiration notification). This configuration can be set by going to Manage/Setup > Application Configuration > Config Settings. In the dropdown, select Scheduled Jobs – Contracts or Scheduled Jobs – Solicitations. Set the *Hide General Notification Header Image* setting as desired.

Note that this **does not** apply to the custom Notification Templates used for Workflow Tasks.

***How will this affect users?***
End Users are not affected as only System Administrators have access to the Configuration Settings

- **Enhancement:** Remove Users Assigned to a Survey and/or Bulk Survey
  *Reference #: 220124.416.3752*

  The ability to remove Survey recipients has been added to Surveys and Bulk Surveys. For individual Surveys, the 'Manage Survey' link now provides a list of Available Employees who can be selected and moved to the Assigned Employees list. And individual employees can be removed in the same fashion. For Bulk Surveys, the 'View' link for a survey shows each intended respondent, with a 'Remove Respondent' button. Note that respondents who have already started or completed the survey cannot be removed.

  ***How will this affect users?***
  End Users are not affected as only System Administrators have access to manage Surveys and Bulk Surveys.

- **Enhancement:** Updated icons within Contract Insight
  *Reference #: 220124.489.3805*

  Several icons have been replaced across the system as the first step in updating the look and feel of Contract Insight. Additional improvements are being planned for future releases.

  ***How will this affect users?***
  End Users are not affected aside from seeing a new style of icons throughout the system.

- **Resolution:** Potential data leakage for Workflow Tasks on Subtables
  *Reference #: 220124.337.4029*

  It was discovered that a Workflow Task was taking the Record ID and, regardless of which area the Workflow Task is tied to, was checking for the Primary Assigned Vendor on the Contract with that same Record ID (e.g. Request ID 100 would pull the Primary Vendor from Contract ID 100). This critical issue could cause the potential for data leakage whereby a Vendor receives an email on a Task that they have nothing to do with which might contain sensitive information. This has been fixed to check the correct Record ID for the Primary Assigned Vendor.

- **Resolution:** Online Document Editor and Toolbox greyed out in Files/Attachments
  *Reference #: 220124.439.4033*

  In the Files/Attachments area on a Record, the Document Toolbox and Online Document Editor icons were being greyed out when users closed the browser or tab instead of using the Save or Close buttons on the Online Document Editor as the file was still considered checked-out. A fix was put in place so that, when this occurs, *the user listed as having the file checked out* can still access the Document Toolbox and Online Document Editor buttons. Once they restart the Online Editor then close using the Save or Cancel buttons on the editor's Home menu, the file will be checked back in and available to other users.
  To modify the ability to Check In/Out files opened using the Online Document Editor, System Administrators can go to Manage/Setup > Application Settings > Config Settings.

Select General from the dropdown menu then, under the General group, modify the *Allow Check In/Out for Online Document Editing* setting.

- **Resolution:** Error After Submitting a Contract
  *Reference #: 220124.416.3924*

  While attempting to create a new Contract from a Vendor record using the Field Mapper, a duplicate column was being recorded which prevented the new record from being created. This has been resolved and the new Contract from a Vendor record should be created as expected.

- **Resolution:** Standard License Users and Ad-Hoc Report Permission
  *Reference #: 220124.509.3917*

  When creating a new ad-hoc report, the Assign To was used to delegate the report to a user that had Standard system permissions; however, the user was experiencing report functionality for a Read-only license level. Only allowing the user to have viewing privileges. A correction was made so the Assign To step provided the appropriate license level.

- **Resolution:** Notification Template Links Default to White Text
  *Reference #: 220124.486.3928*

  An update was made to Notification Templates to make certain that hyperlinks used in the notification are not displayed as white text by default. Additional measures were taken to ensure any colored text will display as expected, and images in the notification header load without a white background if transparent.

- **Resolution:** Super User unable to View and Run Reports
  *Reference #: 220124.509.3936*

  Users with a Super license level were unable to view or run an Ad-Hoc Report they were assigned to. A correction was made so the Assign To step provided the appropriate license level, allowing the Super user the correct permissions.

- **Resolution:** Read-Only user as System Admin
  *Reference #: 220124.416.3944*

  When importing a csv file to update or add Employee Records to the system, if the System Admin was set to true but the License Level was left blank, the License Level would default to Read Only. This has been updated so that if System Admin is set to true, the License Level will automatically set to Admin.

- **Resolution:** Manage Columns on Employee List
  *Reference #: 220124.362.4079*

  The ability to add customized fields on the Employee List was introduced in previous release. An additional improvement has been made to allow users to manage the columns on the Employee List, as can be done in other areas of the system. When the application configuration setting named "Employee List (table or view)", located in the Employees group, is set to 'Table', users will be able to arrange the user customized fields.

- **Resolution:** Deleted file(s) copied when mapping a Request to a Contract
  *Reference #: 220124.416.4089*

  After configuring the Field Mapper to map File Attachments when creating a Contract from a Request record, users noted that files previously deleted on the Request were being included in the new Contract record. This has been updated to ensure previously deleted files are not included during the mapping process.

- **Resolution:** Notification Template reverts to Default Template on Workflow
  *Reference #: 220124.509.4100*

  When updating the Notification Template on a workflow created prior to Version 17.10.0, it was found that the selected Template would revert back to the Default Template after saving. The system was updated maintain the selected Notification Template.

- **Resolution:** PC Helper App Drag and Drop not uploading files
  *Reference #: 220124.441.3943*

  Files were not being uploaded to the record when using the drag and drop feature on the PC Helper Application. A fix was implemented to ensure the drag and drop feature is attaching files as expected.

- **Resolution:** My Calendar Schedule not showing all items to System Administrators
  *Reference #: 220124.486.3829*

  The updated Calendar was not showing all items in the system to a System Administrator when logged in. Now when a System Administrator logs in, a checkbox will be present at the top of their schedule to include all items in the system. In addition, Contracts and Solicitations were showing on the schedule for the full span of the records. These have been updated to only show an entry for each of the key dates. On Contracts: Execution Date, Expiration Notification Date, and Expiration Notification. On Solicitations: Bid Start Date, Questions Due Date, and Bid Due Date.

- **Resolution:** *Request Tasks – Edit All* permission not allowing all users to edit Tasks
  *Reference #: 220124.362.3874*

  When assigned the *Request Tasks – Edit All* permission, users were unable to set the status of a Task from the Task grid on the Request Details page. This has been updated to ensure the permission works as expected across all areas of the system affected by this permission.

- **Resolution:** Unable to use emojis in Contract and Request Notes
  *Reference #: 220124.337.3891*

  Contract Notes and Request Notes did not allow the use of emojis. This has been changed so emojis can be used in these areas.

- **Resolution:** Multi-factor Authentication not working as expected in the Core system
  *Reference #: 220124.416.3918*

  After enabling Multi-Factor Authentication (MFA) in the Core system, users were unable to log in using the code they had received. This has been resolved so that users are able to log in using the MFA code as expected.

- **Resolution:** Subtables not showing when creating Ad-hoc Report with Request Task Details as the primary table
  *Reference #: 220124.416.3860*

  When creating an Ad-hoc Report with Request Task Details set as the Primary table, no subtables were available to include in the report. This has been updated so that Contract Requests can be added as a subtable for the report.

- **Resolution:** Read Only users able to view Manage Columns page from Find/Search pages
  *Reference #: 220124.416.3872*

  Read Only users were able to view the Manage Columns page from the Find/Search pages in the system. While the message was present stating they contact their System Administrators to add columns to the list, the Remove All and Add All links were still available and would Remove or Add all columns to the Find/Search grid. This has been resolved so that the Manage Columns link in the side menu is only available for System Administrators.

- **Resolution:** Encrypted Vendor ID prevented use as link in Ad-Hoc reporting
  *Reference #: 220124.337.3921*

  Users were unable to use the Vendor ID from the Search/View Contracts by Vendor in an Ad-Hoc Report as the Vendor ID was encrypted. This has been updated so the Vendor ID from the Search/View Contracts by Vendor page can be used in an Ad-Hoc Report.

- **Resolution:** Contract Financial Details message wording
  *Reference #: 220124.337.3921*

  Contract Financial Details had error message that mentioned "task record" instead of "contract record" if no contract id was provided in the URL query string. The wording has been updated to reflect “contract record” as expected.

- **Resolution:** Unable to switch Files/Attachments folders using Android tablet
  *Reference #: 220124.441.3846*

  When using an Android tablet, users were unable to switch folders on the Files/Attachments area of a record. This has been fixed so users are able to view different Files/Attachments folders while on an Android device.

- **Resolution:** Unable to edit a record using a mobile device
  *Reference #: 220124.441.3845*
  Users on a mobile device noted that they were unable to edit a Record Details page from their device and the page was grayed out. This has been resolved so the page can be edited as expected when using a mobile device.

- **Resolution:** Logout Redirect
  *Reference #: 220124.337.3948*

  When a user is logged out automatically by Contract Insight, typically due to a session time-out, a page is displayed with a link for the user to log back into the system. The user should be automatically redirected back to page they were on prior to being logged out. Users reported being taken to the Home page in Contract Insight instead. The redirect logic was fixed to ensure users will be returned to the spot when their session timed-out, after logging back in.

# 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.

- **Enhancement:** Online Document Editor disclosure

  *Reference #: 220124.439.4086*

  Every time the Online Document Editor is loaded a new disclosure message will appear. Users will be required to click the 'Continue' button before proceeding to the Online Editor.

  ***How will this affect users?***

  End Users with the ability to use the Online Document Editor will be required to click 'Continue' on the disclosure message.

- **Enhancement:** Online Document Editor Track Changes and Comments for E-Approvals

  *Reference #: 220124.439.3899*

  Approvers can Track Changes and add Comments right in the Online Editor. When Document Protection is set to *Track Changes (Revisions & Comments)* in the Document Template, the Online Document Editor will force Track Changes when the attachment is sent for approval. When set to No Protection, the Approver will be able to Turn Track Changes on directly in the Online Document Editor.

  Tracked changes and comments will be available to each Approver through both the Online Document Editor and the downloaded Word document. Comments will remain available after the document has been fully approved and attached to the record.

  ***How will this affect users?***

  End Users will be able to track changes and add comments to a document using the Online Document editor.

- **Resolution:** IntelliSign signature placeholder not working in Firefox

  *Reference #: 220124.509.4097*

  When using Firefox, users reported receiving a pop-up message after adding multiple signature placeholders, which blocked them from continuing to add the placeholders. In addition, the count showing the number of placeholders was incorrect. This was updated to prevent the pop-up and ensure the count of placeholders was correct for users on Firefox.

- **Resolution:** External Signing Portal users unable to preview a document
*Reference #: 220124.337.4030*

  Participants accessing the Signing Portal were unable to preview the document if they were not an Employee listed in the core system. This was updated to ensure signing participants can preview documents on the Signing Portal as expected.

- **Resolution:** Forced Check In/Out for E-Approval prevents document edit/download
*Reference #: 220124.509.3869*

  When Check-Out/Check-In was set to Forced for an Approval Process, Approvers were unable to download or edit the document sent for review. This has been resolved so Approvers can access the document for editing as expected.

- **Resolution:** Clicking Merge External Template button on Record Details not loading
*Reference #: 220124.441.4091*

  The Merge External Template button on the Record Details screen was not loading the Document Process Manager page. This has been fixed so the Merge External Template button loads the page as expected and users can continue through the process to merge a Third-Party Paper template.

# 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:** Ability to turn off the header image in System generated emails
  *Reference #: 220124.486.3930*

  System Administrators now have the ability to turn off the header image in system generated emails from Contract and eSourcing emails (e.g. Contract Expiration notification). This configuration can be set by going to Manage/Setup > Application Configuration > Config Settings. In the dropdown, select Scheduled Jobs – Contracts or Scheduled Jobs – Solicitations. Set the *Hide General Notification Header Image* setting as desired.

  Note that this **does not** apply to the custom Notification Templates used for Workflow Tasks.

  ***How will this affect users?***
  End Users are not affected as only System Administrators have access to the Configuration Settings

- **Resolution:** Ellipsis unclickable on eSourcing Record's Q&A section
  *Reference #: 220124.416.3915*

  On an eSourcing record in the Core system, users were unable to click the ellipsis in the Q&A section to view more of a specific question or response. This has been resolved by reconfiguring how the list is displayed on the page to ensure all of the information can be viewed as expected.

# Module: Purchase Order Management

Optional Add-On Module for the creation, management, tracking and monitoring of the lifecycle of Purchase Orders as they relate to Contracts.

- **Enhancement:** Ability to create a Request from a Purchase Order record
  *Reference #: 220124.416.4072*

  A Request record can now be created from a Purchase Order record by clicking 'New Request from Record' in the side menu. Field mapping can be configured to pass information from the Purchase Order over to the new Request record.

  ***How will this affect users?***
  End Users with permission will be able to create a Request record directly from a Purchase Order record.

- **Resolution:** Purchase Orders not linked to a Contract
  *Reference #: 220124.337.3920*

  Users were experiencing an issue when viewing a Purchase Order that was not linked to any Contract records. This has been resolved so the Purchase Order can be viewed as expected.

- **Resolution:** Purchase Orders Financial Details permission for Read Only Users
  *Reference #: 220124.337.3921*

  Read only user permissions were inconsistent between PO Financial Details and Contract Financial Details. This has been resolved so the permission is the same (view only) for Read Only users.

- **Resolution:** Purchase Order Line Items calculations display
  *Reference #: 220124.337.3921*

  The PO Line Items subarea was not displaying the following values appropriately when they were null: Contract Budget, Contract Budget Remaining, Total PO Amount, Contract Budget Percent Used, and Budget Percentage Remaining. This issue has been resolved so the values display as expected.

# 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.

- **Resolution:** SQL Error on Create Request in Gateway
  *Reference #: 220124.509.4088*

  When submitting a public Request record on the on the Vendor/Client Gateway a SQL error was being triggered when the record was saved. This was resolved to prevent the SQL error and it was verified that the new Request record saves and is available in the Core system.

- **Resolution:** Unable to remove PO header menu item from Vendor/Client Gateway
  *Reference #: 220124.416.3937*

  System Administrators were unable to remove the Purchase Orders header menu item from the Vendor/Client Gateway if they did not have a license for the Purchase Order module. This has been resolved so Purchase Orders does not show in the header menu when it is not licensed.

- **Resolution:** Display and Export of Questions on Vendor Gateway
  *Reference #: 220124.416.3914*

  Exported Bid Questions from the Vendor/Client Gateway were formatted incorrectly when line breaks were present in the question or response. This has been updated to ensure the exported data is formatted so that if line breaks are present, the information stays in the same cell if it is part of the same question or response.

- **Resolution:** eSourcing Pricing Line Item grid submitted on Vendor/Client Gateway displaying as ID
  *Reference #: 220124.509.3902*

  After entering and submitting values for a Pricing Line item on the Vendor/Client Gateway, the grid was displaying the ID of the item instead of the item Name/Description. This has been resolved so the Name/Description of the item is displayed in the grid as expected.

- **Resolution:** eSourcing Questions not submitted on first try on the Vendor/Client Gateway
  *Reference #: 220124.416.3908*

  When asking a question on an eSourcing record on the Vendor/Client Gateway, users would often need to click the button multiple times before the question would submit. This has been fixed so the button works as expected and submits the question on the first try.

# 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, DocJuris, and signNow

- **New Feature:** Integration with signNow
  *Reference #: 220124.362.3212*

  Clients using signNow for their electronic signature processing can now do so directly from their instance of Contract Insight. Once configured, users will be able to send a document for signing to signNow using the Document Toolbox on any Record Details screen’s Files/Attachments area.

  ***How will this affect users?***
  If configured, End Users with a signNow integration will be able to send documents for signature using their signNow account.

- **Enhancement:** DocuSign File Attachment Selection Changes
  *Reference #: 220124.362.2812*

  The integration with DocuSign has been enhanced to assist users in selecting the correct document(s) needed for the signature process. On the Create Envelope page, users will notice that there are additional columns added to the file list: Uploaded By, Category, and File Note (100-character limit). In addition, on initial load, the list of files is sorted with the newest files at the beginning of the list. If multiple documents are selected, users will then be presented with the Document Order page so they can specify the order in which the documents should be sent to DocuSign.

  ***How will this affect users?***
  End Users with access to start a DocuSign process will find it easier to select the files to include and the order in which to send them for signature.

- **Resolution:** AdobeSign File Updates
  *Reference #: 220124.362.4092*

  A database timeout error when attaching multiple files to an agreement was reported when utilizing AdobeSign. The process was assessed, and new logic was added to improve the way multiple files are handled when attached to a document within the AdobeSign process. The new logic allows for greater database stability when handling multiple files.

# HOTFIXES

Below are the items released as part of any Hotfix(es) since the previous release.

## Hotfix Items for 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.

- **Hotfix Enhancement:** Configuration to Show/Hide Report Name & Date in First Row
  *Reference #: 211108.337.3799*

  A configuration setting was added to enable System Administrators to remove the Report Name and Date in the first row of an exported Ad-Hoc Report. The *Data Exporting: Include Report Title Row* setting can be found within Config Settings under "General System".

- **Hotfix Enhancement:** Adding multiple new fields using the Field Manager
  *Reference #: 211108.416.3792*

  The process for adding multiple new fields to a table in the Field Manager has been improved. After adding a new Field, an "Add New Field" button appears which enables users to add another new field without having to return to the Field Manager's main page first.

- **Hotfix Enhancement:** Search Files and Search Notes look and feel inconsistent between Contracts and E-Sourcing
  *Reference #: 211108.416.3701*

  Users reported an aesthetic difference between the Search Files and Search Notes in the Find/Search areas of Contracts and E-Sourcing. The UI has been updated to ensure that the Search Files and Search Notes appearance are similar.

- **Hotfix Enhancement:** Add options for Return to Contract List and Return to Request List
  *Reference #: 211108.377.3132*

  The ability to navigate back to the full list of Contracts and/or Requests was not present in the side menu of a Contract or Request Details page. In line with other areas of the system, 'Return to Contracts List' and 'Return to Request List' links were added to the respective side menu on the Contract Details and/or Request Details pages.

- **Hotfix Enhancement:** Adding a default Role to new API clients
  *Reference #: 211108.362.3776*

  Previously, adding a new API client in Contract Insight left the Role field blank. This change sets the OAuth role to Admin when a new API client is created.

- **Hotfix Resolution:** Employee Details 'View History' only showing the record IDs and not the area
  *Reference #: 211108.416.3777*

  When viewing the history on an Employee Details record, the entries were showing the Record ID that was interacted with but not which area of the system. This has been updated so the Employee Details history log includes the area of the system interacted with in addition to the Record ID.

- **Hotfix Resolution:** VISDOM AI Configuration Spelling Error
  *Reference #: 211108.377.3798*

  Within the field selection process for the Contract Insight VISDOM AI there was a spelling error found for the "Category" field. The spelling was corrected.

- **Hotfix Resolution:** Financial View Permission Mismatch Between Contract & PO
  *Reference #: 211108.337.3839*

  Permission to view financial information for Read-only users was available for Purchase Order records but was missing on Contract records. The permission logic was updated to allow Read-only users to have view access to financial information for contracts, unifying the functionality offered on Contract and Purchase Order records for financial information.

- **Hotfix Resolution:** Workflow configuration for Files/Attachments only available on Contract
  *Reference #: 211108.362.3087*

  The ability to create workflows for a Record's Files/Attachments area was previously only available for Contract Files/Attachments. This has been updated to extend to Requests, e-Sourcing, POs, Employees, and Vendor/Company records.

- **Hotfix Resolution:** Some Workflow Task Notifications not showing links
  *Reference #: 211108.486.3823*

  Notifications using the Default Template from a workflow Task were not including the links to access the related Record Details page or Task Details page when configured to show. This has been resolved so that the links show as expected in the Default Template.

- **Hotfix Resolution:** Unable to edit PDF files with uppercase file extension
  *Reference #: 211108.439.3841*

  System configurations allowing the attaching/editing a PDF using online editing found that PDF files could only be edited if the file extension was lowercase. This has been fixed so that, if configured, PDF files can be edited if the file extension is lowercase (.pdf) or uppercase (.PDF).

- **Hotfix Resolution:** VISDOM Named Entity Recognition highlight formatting
  *Reference #: 211108.362.3806*

  VISDOM's Named Entity Recognition (NER) formatting was causing a found element to be shown as replicated several times. This was corrected to function normally, showing each found element and bolding them individually.

- **Hotfix Resolution:** Contract Details record link in Task Notification email directing user to the Task Details
  *Reference #: 211108.486.3847*

  Users reported the View Record link in the Contract Task notification was directing them to the Task Details page instead of the Contract Details as was expected. The link was corrected to navigate users appropriately to the Contract Details page.

## Hotfix Items for 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.

- **Hotfix Resolution:** E-Approval Auto-Attach to Record mismatch version title and file name
  *Reference #: 211108.337.3781*

  For files auto-attached to a record from a completed E-approval process, the file name would be a combination of the version title along with the file extension. To improve the file name and avoid confusion, the logic was updated to properly tie the File Name Field from the E-Approval process to the same for the record attachment. Resulting in the File Name showing the original file name and the Notes showing the version name when they are attached to the record.

- **Hotfix Resolution:** Document Collaboration Signing Dashboard Timeout Error When Loading Page
  *Reference #: 211108.337.3828*

  Some users reported receiving a timeout error when attempting to load a document for signing that was several megabytes in size. This has been resolved so users no longer receive a timeout error.

- **Hotfix Resolution:** Sign Now File Name Change
  *Reference #: 211108.377.3827*

  A file with multiple periods in the file name (Ex. Test.1.2.3.4.5.docx) that was sent using the "Sign Now" signature process resulted in removal of text after the first period (e.g. "Signed_Test.1.2.3.4.5.pdf" saved as "Signed_Test.pdf"). The system has been updated to accommodate file names with multiple periods.

## Hotfix Items for Module: Purchase Order Management

Optional Add-On Module for the creation, management, tracking and monitoring of the lifecycle of Purchase Orders as they relate to Contracts.

- **Hotfix Resolution:** Financial View Permission Mismatch Between Contract & PO
  *Reference #: 211108.337.3839*

  Permission to view financial information for Read-only users was available for Purchase Order records but was missing on Contract records. The permission logic was updated to allow Read-only users to have view access to financial information for contracts, unifying the functionality offered on Contract and Purchase Order records for financial information.

## Hotfix Items for 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.

- **Hotfix Resolution:** Vendor/Client Gateway login credential email not being sent under specific circumstances
  *Reference #: 211108.439.3808*

  After creating an account on the Vendor/Client Gateway, the credentials email was not being sent if the ability to upload documents during the Create Account process was enabled. This has been resolved so the credentials email is sent as expected.

- **Hotfix Resolution:** Product Service Code not filtering on the Vendor/Client Gateway
  *Reference #: 211108.439.3832*

  When configured as a Filtered Dropdown field in the Core system, the Product Service Code field was not filterable on the Vendor/Client Gateway. This has been updated so the Product Service Code field is filterable on the Vendor/Client Gateway.

- **Hotfix Resolution:** Vendor/Client Gateway password reset for Simplified login requiring Company ID
  *Reference #: 211108.439.3832*

  Vendors/Clients who needed to reset their password before logging in were being asked for their Company ID even though the login method was set to Simplified Login. This has been resolved so the Company ID is only requested if using the Standard Login method.