COBBLESTONE
SOFTWARE

CONTRACT INSIGHT
RELEASE NOTES

Version 17.11.1 (rev 220331)

Thursday March 31, 2022

CobbleStone Software

IT Department

www.CobbleStoneSoftware.com

Support@CobbleStoneSoftware.com

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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)*
17.11.1 (Rev 220331)	Thursday March 31, 2022	Patch

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:** Configure a Default Files/Attachments Folder Structure
  Reference #: 220331.486.3146

  The ability to define a default folder structure for the Files/Attachments area on records is now available. System Administrators have the ability to specify the folders and sub-folders that should be added to a record automatically when created. This can be configured by going to Manage/Setup > Application Configuration > Default Folder Structure.

  How will this affect users?
  End Users will see any default folder structure set by a System Administrator after creating a new record in the system. Only System Administrators have the ability to configure the default folder structure.

- **Enhancement:** Ability to Configure Default Sort Order Across All Task Tables
  Reference #: 220331.337.4199

  System Administrators can now configure the default Sort Order of Tasks across all record types. The *Default Task Grids Sort Order* setting can be found in the Config Settings under General > Tasks and have the following four options: Date Entered, Date Updated, Task Start Date, or Task End Date. Once configured, Tasks on all records will automatically be sorted, with the older Tasks listed first, by the selected sort order.

  How will this affect users?
  When viewing a Record, End Users will see the Tasks sorted in the order selected by the System Administrator. They can still sort the list manually by clicking on the column headers.

- **Enhancement:** Update Online Editor's Cobblestone tab dropdowns to filtered dropdowns
  Reference #: 220331.439.4195

  Within the Online Editor, the Clause field dropdown has been updated to be a filtered dropdown which enables users to begin typing in the selection to limit the available options. The Online Editor for Document Collaboration has also been updated to filtered dropdowns for the Clauses as well as the Mergeable content dropdowns.

  How will this affect users?
  End Users with permission will be able to begin typing the content to filter the options in the Online Editor Clause field and the Clause and Mergeable content dropdowns in the Document Collaboration process.

- **Resolution:** My Calendar not showing Parent Record ID and Title when hovering over a Task on the calendar
  Reference #: 220331.416.4207

  Users noted that the Parent Record ID and Parent Record Title were now showing when hovering over a Task on the Calendar. This has been resolved so the Parent Record information shows in the hover text, making it easier to see which record the Task is assigned to.

- **Resolution:** Decimal on System Dashboard Summary Tiles different from user's System Dashboard view
  Reference #: 220331.337.4204

  Dashboard Summary tiles were showing values with zeros in the decimal places when viewing a System Dashboard from the My Dashboards page, however, when viewed from the Manage System Dashboards page, they showed decimal values. This has been fixed to show the appropriate decimal number in both views of the System Dashboard.

- **Resolution:** Data Import Manager Summary information inaccessible
  Reference #: 220331.416.4196

  The ability to access the Summary for data import files that have been processed was inaccessible as the linked icon to navigate to the page was missing. The icon was readded, allowing users to access the summary information once again on the Data Import Manager: File Processing page.

- **Resolution:** Configuration "Default Department" settings not checking Conditional Fields
  Reference #: 220331.439.4205

  The *Default the Department Field on Contract Records* and *Default the Department Field on Request Records* configuration settings were not checking for conditional fields using Department as the parent, causing those conditional fields to not work as expected. The configuration settings were fixed to ensure conditional fields using the Department field as a parent are taken into consideration

- **Resolution:** View Employee's Permissions button white screen when attempting to load
  Reference #: 220331.416.4169

  When an employee had permission to view a large number of records in the system, the *View Employee's Permissions for all viewable records* button was timing out and generating an error. This has been resolved by adding a "please wait" message and a loading indicator so the user knows the system is working and also by increasing the page timeout setting.

- **Resolution:** Ad-Hoc Report Dashboard Dock cannot export due to duplicate column names
  Reference #: 220331.337.4200

  Some Ad-Hoc Reports on a Dashboard Dock would fail on export due to duplicate column names. This has been updated so there are not duplicated column names in the report.

- **Resolution:** Users without Hierarchy: Create New Hierarchy permission still seeing 'Add' button in grid
  Reference #: 220331.509.4172

  Users without the *Hierarchy: Create New Hierarchy* permission assigned to their account were still seeing the 'Add' button in the Hierarchy grid. This has been updated so the button is hidden if the user does not have the appropriate permission.

- **Resolution:** Emails not sending if Reply To Address for Contracts/Solicitations & Tasks config settings separated by semicolons
  Reference #: 220331.509.4192

  If the "Reply To Address for Contracts & Tasks" or "Reply To Address for Solicitations & Tasks" were set with multiple email addresses, the email notifications were not being sent to users as expected as there was an error when a semicolon was used to separate the email addresses. This has been resolved so the notifications are sent when multiple email addresses are present in the configuration settings and separated by a semicolon.

- **Resolution:** File/Attachments Notes and Category not changing when uploading same file in succession
  Reference #: 220331.509.4178

  On the Files/Attachments area of a record, users noted that if the same file was uploaded to a record in succession, the Notes and Category kept the same values as the first one that was uploaded. This has been fixed so the updated Notes and Category are populated as set for each upload of the same file.

- **Resolution:** Non-Legacy Ad-Hoc Reports cannot export due to duplicate column names
  Reference #: 220331.337.4197

  Non-legacy Ad-Hoc Reports were previously updated so that multiple "View" columns were updated to be labeled with the record area and ID (e.g. – Contract ID). When another column with the same name was added to the Ad-Hoc Report, the file would not export. This has been updated so the column name for the view link is preceded with the word "View" (e.g. – View Contract ID).

- **Resolution:** Edit with Text Extract page not loading under certain circumstances
  Reference #: 220331.362.4191

  It was discovered that the Edit with Text Extract page was not loading as expected if no reference field mappings were present in the VISDOM process. This was resolved to ensure the page will still load if no reference field mappings are present.

- **Resolution:** Message Templates decommissioned on One-Off Emails
  Reference #: 220331.486.4210

  Message Templates within one-off emails on the records were decommissioned with the recent updates to Alerts and Notifications in the system. This legacy feature has been reinstated for users who previously had existing Message Templates created in their system so they can continue to use them while transitioning to the new Alerts and Notification templates.

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:** Update Online Editor's Cobblestone tab dropdowns to a filtered dropdown
  Reference #: 220331.439.4195

  Within the Online Editor, the Clause field dropdown has been updated to be a filtered dropdown which enables users to begin typing in the selection to limit the available options. The Online Editor for Document Collaboration has also been updated to filtered dropdowns for the Clauses as well as the Mergeable content dropdowns.

  How will this affect users?
  End Users with permission will be able to begin typing the content to filter the options in the Online Editor Clause field and the Clause and Mergeable content dropdowns in the Document Collaboration process.

- **Resolution:** e-Signature/e-Approval Notification Template footer information
  Reference #: 220331.509.4251

  The footer of the new Notification Template sent for e-Signature and e-Approvals contained CobbleStone information as static text. This was resolved by changing the footer text to read as:

  If you have any questions regarding this notification or associated document(s) requiring your signature, please contact the sender directly.

  This message was sent to you using the Collaboration Gateway (a Contract Insight Document Collaboration Gateway Product). If you would rather not receive e-mail from this sender, you may contact the sender with your request.

- **Resolution:** "Buffer cannot be null" when generate doc temp
  Reference #: 220331.416.4177

  When attempting to generate a Document Package with a reference to a Mergeable Clause with no attachment, users were receiving an error in the final merged document that was not descriptive. The error message has been updated to describe the issue and reference the Mergeable Clause that is missing a file.

- **Resolution:** Edit button visible on 'Acknowledge Only' e-Approval processes
  Reference #: 220331.439.4201

  For e-Approval processes set to "Acknowledge Only", approvers were still presented with the button for the Online Editor. This was resolved by ensuring the Editor button is hidden if the Approval is set to "Acknowledge Only".

- **Resolution:** Unable to configure "Used for Versions" on Third Party Paper Approval Groups
  Reference #: 220331.509.4198

  Users noted that, when adding an Approval Group for a Third Party Paper, they were not presented with the "Used for Versions" option as they are with Merged Standard Templates. This has been updated so users configuring the Approval Group can now select which version the Approval Group is for on a Third Party Paper.

- **Resolution:** Mergeable Clause with Content Control cannot be merged multiple times in same document
  Reference #: 220331.416.4186

  Users were running into an issue when merging a Document Template that included a Mergeable Clause with Content Control set to Yes and was used multiple times across different paragraphs within a single document. The system has been updated so that a Mergeable Clause with Content Controls turned on can be used multiple times across a document as expected.

- **Resolution:** Unable to preview archived version of file during e-Approval process
  Reference #: 220331.439.4176

  Attempting to Preview the Archived version of a document during the Approval process was resulting in an error message or the user being logged out of the Signing Portal. This has been resolved so the Archived version of the document can be viewed during the Approval process.

- **Resolution:** Edited document via online editor is not recognized as new version for Approval Process
  Reference #: 220331.439.4213

  Optional participants were not receiving a notification when a document sent for approval was updated using the Online Editor during the e-Approval process. This has been updated so the optional participant receives an email notification as expected with there is a new version of the document created through the Online Editor.

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.

- **Resolution:** E-Sourcing Change Notification emails addressed to same Respondent Contact Name
  Reference #: 220331.509.4192

  Solicitation Change Notification emails sent to Assigned Respondents were all addressed to the same contact name. The issue was resolved so that the Change Notification emails are addressed to the appropriate contact name.

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

- **Enhancement:** Added paging of DocuSign user list
  Reference #: 220331.362.4206

  The External E-Sign Configuration for DocuSign has been updated to add paging to the user list. This enables the viewer to view the list of users across multiple pages. Users can navigate pages by using the Next/Previous buttons or by selecting the page number to view at the bottom of the list. At the top of the list, users can also designate how many results are shown on each page while viewing at that time.

  How will this affect users?
  End Users are not affected as only System Administrators have access to view this page in the system.

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: Alerts & Notifications Enhancements**
  Reference #: 220310.486.3635

  Workflow Alerts – On Screen and Email Options
  System Administrators and Admin Users with permission are now able to choose whether a Workflow Alert is On Screen or Email. Both types of Alerts can now also include Merged Fields in the Message Body and are available for the six main areas of the system.

  One-off and Secure Email Message Body Updates
  One-off Email and Secure Emails from a Record Details screen have been updated to enable users to include Merge Fields in the Subject and Message Body of the emails.

  Emails Sent Subtable
  Task Alerts, Workflow Alerts, and One-Off Emails are logged in a new 'Emails Sent' table found on the Record Details screens under 'Tasks & Email'. Each entry in the table also allows users to resend the communication using the 'Resend' link found for each line item.

  How will this affect users?
  End Users may see on screen or emailed alerts if configured by a System Administration or Admin User with permission. They will also be able to include Merge Fields in One-off and Secure Emails from a record as well as resend emails from the Emails Sent subtable on the Record Details screens.

- **Hotfix Enhancement: Survey Enhancements**
  Reference #: 220310.486.3494

  The Survey Add page has been updated to include options for the Notification that is sent to respondents. Users creating the survey can currently choose from two Notification Skins (which will be customizable in a future release) and can define the Notification Subject and Notification Body fields to include Merged Fields from the selected Area in the initial survey invitation email. There is an additional option of adding Survey Fields to the Notification.

  All initial survey invitations and reminders will be logged in a new 'Emails Sent' table found on the Record Details screen under Tasks & Email.

  How will this affect users?
  End Users are not affected as only System Administrators can create and modify Surveys.

Hotfix Enhancement: Organizing Reports Using Folders

Reference #: 220310.416.3689

CobbleStone has implemented a folder structure system that can be used to organize Ad-Hoc Reports within folders. The folder structure works similar to the Files/Attachments area on the Details screens and users with access will be able to Add, Modify, and Delete folders.

How will this affect users?

End Users with access to the Ad-Hoc Reports list will now see a 'Report Folders' section on the left side of the My Ad-Hoc Report List page. Users with permission can add a folder by clicking the button with a plus icon.

Hotfix Resolution: Notes on Request Not Retaining Apostrophes

Reference #: 220310.416.4115

Users reported that apostrophes were not being retained when entered in either the Subject or Body of a note on a Request record. A change was made to allow apostrophes in the Subject or Body. The change was also disbursed to the other areas of the system, such as Contracts, e-Sourcing, and Companies.

Hotfix Resolution: Saving a Field in Field Manager Clears Cascade Setting

Reference #: 220310.337.4145

A cascading field is one whose contents are reliant on the selection of a particular value in another field. An issue was reported where a drop-down menu was set up in the database to be a cascading field, but when a user updated the field in the Field Manager, the cascading configuration was cleared. A fix was implemented to ensure the cascading field remains in place when other updates are made to the field in the Field Manager.

Hotfix Resolution: Ability to Add or Change an Employee License When No Concurrent Licenses Were Available

Reference #: 220310.416.4109

Clients with the Concurrent License option noticed that they were able to add a new Employee or change an existing Employee's license type when no license of that type was available. The system has been updated to only allow Employee creation or editing to an available license type.

Hotfix Resolution: Adding Contract Types to Clause in Library

Reference #: 220310.509.4120

Users were unable to add multiple Contract Types to a Clause in the Clause Manager. This has been resolved so multiple Contract Types can be assigned to a Clause as expected.

- **Hotfix Resolution: Open Tasks Pop-up on Record Including Closed Tasks**
  Reference #: 220310.509.4130

  The Open Tasks pop-up on a Record Details screen was found to be including Closed Tasks in the count. This has been fixed to only show the count of Open Tasks.

- **Hotfix Resolution: Only First Subtable Entry Data Being Merged in Custom Task Notification Emails**
  Reference #: 220310.486.4136

  The custom Task Notifications Template for Workflows on a Subtable were pulling information from the first entry in the subtable instead of the one triggering the workflow. Updates were made to ensure that the data being merged into the Notification Template is pulling the correct entry from the subtable.

- **Hotfix Resolution: Request Type Not Mapping When Creating a New Contract From the Record**
  Reference #: 220310.416.4139

  When creating a new Contract record from a Request Record, the Request Type was not mapping over to the Contract Type even though the Field Mapper was configured to do so. The system has been updated to pull the mapped Request Type to the Contract Type as expected.

- **Hotfix Resolution: Scrollbar Disappears on Certain Dashboard Pages**
  Reference #: 220310.416.4144

  A user reported two instances where the both the vertical and horizontal scrollbars are missing when assigning or removing a System Dashboard from an Employee and when assigning a System Dashboard from the Manage Security Groups page. An update was made to correct how the scrollbars are being displayed.

- **Hotfix Resolution: Global Search Results Right Justified**
  Reference #: 220310.509.4140

  When Vertical Scroll Position in the Tables/Grids section of the General System Configuration Settings was set to "Left", it was causing the horizontal scrollbar at the bottom of the Quick Search results grid to be right justified. This has been resolved so the horizontal scrollbar moves to the left after loading.

- **Hotfix Resolution: Standard License User Permissions for Ad-Hoc Reporting**
  Reference #: 220310.337.4150

  Users with a Standard user license were not able to work with Ad-Hoc Reports as originally designed. Standard users with the *Reports: Manage My Ad-Hoc Reports/Searches* permission are now able to: Create a new Ad-Hoc Report and Delete, View/Run, Manage/Edit, or Copy any Ad-Hoc Report they created or are assigned to. Standard users without this permission will only be able to View/Run Ad-Hoc Reports they are assigned to.

- **Hotfix Resolution: Lists of Contracts – Different for Linked Companies**
  Reference #: 220310.509.4160

  The View Contracts list from the Vendor Details side menu was not including Contracts where the Vendor was listed as an Additional Company. This resulted in the View Contracts list from the side menu and the Contract(s) list on the Vendor Details page being different. This has been updated so the View Contracts list also shows the records where the Vendor is listed as an Additional Company.

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 Enhancement: Update "Sign Now" in the Document Toolbox to "IntelliSign Now"**
  Reference #: 220310.416.4122

  The ‘Sign Now’ option within the Document Toolbox has been renamed ‘IntelliSign Now’ to prevent confusion with the newly available External E-Sign Integration through the company signNow.

  How will this affect users?
  End Users with access will see ‘Sign Now’ has been updated to ‘IntelliSign Now’ in the Document Toolbox in the Files/Attachments area of a record.

- **Hotfix Resolution: Document Collaboration File Attachments Issue**
  Reference #: 220310.416.4157

  When attaching a new file from the Record onto the Document Merge Process, users were receiving an error message after selecting the file and saving. It was determined that the system was looking for ‘File Title/Notes’ field to be populated even though it was not a required field. The logic for the ‘Attach From Record’ button was reconfigured to allow the file to be attached from the record if the ‘File Title/Notes’ field is left blank, as expected.