COBBLESTONE
SOFTWARE

CONTRACT INSIGHT
RELEASE NOTES

Version 17.5.0

Thursday January 23, 2020

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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)*
17.5.0	Thursday January 23, 2020	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 **four (4) 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 ***revision or patch number***. This number changes with each new released version. The revision or patch refers to a release centered on minor enhancements and issue resolutions.

A release altering this segment is a **patch** release type.

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: Dashboards – Executive Graphical Dashboards
Reference #: 122019.393.14

Executive Dashboards are a new dashboard type within Contract Insight which provide information using graphical elements. These dashboards provide valuable information to the user at a glance and can be used to compare fields, summarize fields, etc.

The following pre-configured Executive Dashboards are included with this update:

- Bids Overview
- Contracts KPI
- Contracts Overview
- Counts by Dept.
- Legal Dashboard
- Vendor Management
- Year Analysis

How will this affect users?
Graphical Dashboards can be created on both User Dashboards (by End Users) and System Dashboards (by System Administrators)

New Feature: Field Manager - Adding Bulk Records to Sub Tables
Reference #: 122019.439.23

Authorized users can now create a Bulk Add template via the Field Manager. Once a template is created, users with access to update sub tables will have the ability to add records in bulk on one screen.

How will this affect users?
Most End Users are not affected as only authorized users have access to perform this function.

Enhancement: Core - Inline Document Packages on Record Details Pages
Reference #: 122019.337.45

Merged Document packages can now be added, viewed, and managed from a sub-grid/sub-area directly on the Details page of the 6 top level areas: Requests, e-Sourcing, Contracts, Purchases, Employees, and Companies.

How will this affect users?
For authorized users, this enhancement streamlines the process of working with/managing merged document templates on a given record's details.

- **Enhancement: Core – REST API**
  Reference #: 122019.422.277

CobbleStone has enhanced our API offering to the next generation of RESTful APIs. This can be implemented as a separate application, side-by-side with both SaaS and Enterprise Contract Insight clients.

End-Users would be able to access the desired endpoints that are dedicated for each entity. For example: access the Contracts table, then the end-user could create a web call to the REST endpoint, passing the entity name as the first parameter along with any query criteria, if needed.

Operations on data through this API would reflect the same as Contract Insight where only Insert and Update are available and Delete is not allowed.

This version of API has its own separate list of authenticated users, but it is linked to the users list in Contract Insight for logging purpose only. The authentication mechanism is implemented with OAuth 2.

How will this affect users?
End users have a more secure and streamlined option when using REST APIs and OAuth2.

- **Enhancement: Field Manager - Show or Hide Fields Based on a Field's Value**
  Reference #: 122019.439.26

This Field Manager enhancement allows users with access to configure a field to show or hide based on another field's value. When creating or editing a field, conditions can now be added to limit when that specific field is visible to the user when they are filling out the record. For example, hiding a field until the Status of the record is Active.

How will this affect users?
Authorized users will be able to create conditions on fields to show/hide another field based on a response. End Users updating or adding a record will only see the field once the specified conditions are met.

- **Enhancement: Dashboards - Launchpad Tiles & Summary Tiles to System Dashboard**
  Reference #: 122019.565.759

System Administrators now have the ability to create Launchpad Tiles and Summary Tiles on System Dashboards. The functionality is the same as on End User created dashboards.

How will this affect users?
Most End Users are not affected as only authorized users have access to perform this function.

Enhancement: VISDOM - Auto-Extract Engine Improvement
Reference #: 122019.362.32

This enhancement updates the text extraction / machine learning tools commonly referred to as VISDOM and includes may new features and improvements such as data pre-processing, configurable search algorithms, and clause detection. A new configuration area has been added for Administrators to control how and where VISDOM is used in the system, including enabling 'Add With File' functionality within the six major system areas.

How will this affect users?
Most End Users are not affected as only authorized users have access to perform this function.

Enhancement: Surveys – Survey Enhancements
Reference #: 122019.416.10

Survey and Questionnaires have been significantly enhanced with reorganized screens, improved survey creation, management, and assignment. At a high level, the following enhancements were made:

Adding a New Survey
- Survey Add screen reorganized
- Form management takes place on the page instead of in a pop-up and includes a new dropdown box for selecting an Employee Role. This dropdown limits the section of the survey to be viewable only by employees assigned to the selected role.
- 'Add Question' button added for a popup with the list of questions already created as well as a link to create a new question.

Question Banks and Questions
- Question Banks reconfigured to show as a list, similar to the Files/Attachments section on other records, and have been improved in terms of speed, error handling, and validation.
- Add multiple new questions to a Question Bank without having to leave the screen
- Add multiple questions to a Survey without leaving the screen

Assigning the Survey to a Record
- Surveys must be uniquely named
- Will not add the survey if any information is missing (no sections, questions, etc.)
- Response Open Date restricts access to take the survey until the Response Open Date
- Enhanced adding specific Vendors or Internal Employees process

Viewing Survey Results
- Viewers can view results based on the scores for the given answers.
- If the survey is eligible for down-selection, it will now show the option.

How will this affect users?
Most End Users are not affected as only authorized users have access to perform this function.

- **Enhancement: Permissions - Limit Record Permissions Based on a User's Department**
Reference #: 122019.416.248

Updated the Add and Edit permissions for Requests, POs, and Solicitations to limit users to the department(s) they are assigned. This functionality is similar to the Contract Add and Contract Edit functionality.

How will this affect users?
Most End Users are not affected as only authorized users have access to perform this function.

- **Resolution: Contract ID column on Find/Search screen showing as a decimal instead of an integer**
Reference #: 122019.416.226

Column on the Find/Search screen has been updated to show the Contract ID as an integer.

- **Resolution: File Attachment uploader not populating the 'File Note' and 'File Category' when importing a file from a cloud drive**
Reference #: 122019.416.326

Updated to ensure 'File Notes' and 'File Category' fields are populated when using Import From Cloud

- **Resolution: Unable to delete a checked-out file attachment from a record**
Reference #: 122019.377.664

Users are now able to delete a file attachment that has been checked-out.

- **Resolution: Custom created Request Types being assigned to the incorrect system area**
Reference #: 122019.439.267

Application verifies custom Request Types are assigned to the appropriate system area and updates if necessary.

- **Resolution: Removing an Ad-Hoc Report field used on a Summary Tile causes the Dashboard to crash.**
Reference #: 122019.393.500

A message will now notify the user that the Ad-Hoc Report field is being used on a Summary Tile and the tile must be removed before the field can be deleted.

- **Resolution: Users unable to view public Decision Matrices.**
  Reference #: 122019.377.554

  Application updated so that a Decision Matrix marked 'Public' is visible.

- **Resolution: Company Records with Tasks associated to them cannot be deleted.**
  Reference #: 122019.416.600

  Updated ability to delete Company Records as well as any Tasks associated with that record.

- **Resolution: Removing field used as a rule on a template causes Document Templates and Packages to not function as expected.**
  Reference #: 22019.416.816

  Users are now able to remove the mergeable field after setting rules and conditions on Mergeable Clauses and Clause Library References

- **Resolution: Menu option to delete a Company Contact is hidden**
  Reference #: 122019.362.835

  The menu option was inadvertently being hidden for users without the Vendor Client Gateway and has been resolved.

- **Resolution: In certain circumstances an issue would arise in a Contract record if it triggered a workflow based on a field containing a single quote.**
  Reference #: 122019.362.811

  Fields are now able to contain a single quote without issue.

- **Resolution: Internet Explorer users unable to add a new Company with the Google Map feature.**
  Reference #: 122019.439.532

  The Company/Vendor's Google Map feature is now compatible with Internet Explorer.

- **Resolution: Setting Security Group restrictions for Manage Reference Data to Contract Types not allowing user to log in**
  Reference #: 122019.362.810

  Users with restricted Contract Type permissions via a Security Group are now able to log in without issue.

- **Resolution: A PDF that has gone through the OCR process and is over 1 MB in size cannot be downloaded as a Word document.**
  Reference #: 122019.362.225

  This restriction was working as expected but has been altered to enable users to perform this action.

- **Resolution: Users with View Only access able to attach an OCR PDF**
  Reference #: 122019.416.667

  Refined permissions so that users with View Only access cannot attach an OCR PDF.

- **Resolution: Dashboard Summary Tile from a value on a sub-table in an Ad-Hoc report not calculating properly**
  Reference #: 122019.393.216

  Summary Tiles on the Dashboard have been updated to calculate as expected when using a value from a sub-table on an Ad-Hoc report.

- **Resolution: Users redirected to a new page when approving a Task after checking/unchecking 'Show Auto Complete' on the Task table.**
  Reference #: 122019.416.593

  Task approval process works as expected after using the 'Show Auto Complete' functionality.

- **Resolution: Information not carrying over when it is being mapped from one user defined sub-table to another.**
  Reference #: 122019.416.575

  Updated the Field Mapper feature to resolve user defined sub-tables not mapping to one another.

- **Resolution: Vendor Type showing in the Vendor/Company list as an ID instead of the Vendor Type name.**
  Reference #: 122019.416.235

  Reconfigured the Company list to populate the name of the Vendor type instead of the ID number.

- **Resolution: Ad-Hoc Reports with a blank expression statement ('and' or 'or') crashing**
  Reference #: 122019.393.653

  An error message directing users to review the expression if there is an issue.

- **Resolution: Vendor ID Column showing as a decimal in the Vendor/Customer list.**
  Reference #: 122019.377.854

  Reconfigured the Company list to show the Vendor ID as an integer instead of a decimal.

- **Resolution: User defined sub-table columns on a record not ordered properly.**
  Reference #: 122019.416.872

  Sub-table columns on a record are now ordered according to sub-table field order.

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: Signing - E-Z Sign Internal "Sign Now" Option**
  Reference #: 122019.393.18

  Users can now sign a document directly from the Contract Document Toolbox. By choosing the 'Sign Now' option from the Document Toolbox, users with access will be able to sign a PDF or Microsoft Word attachment right from the record .

  How will this affect users?
  Users with access will be able to sign attached documents directly from the Document Toolbox.

- **New Feature: Signing - eSign Reminders to Sign**
  Reference #: 122019.393.17

  Authorized users can now set reminders for signers when creating a Signature Group. They can specify the number of days before the first notice is sent as well as the number of subsequent notices. The reminder emails are sent to the Participants of an E-Signature Flow / Groups who have not signed the document yet.

  How will this affect users?
  Most End Users are not affected as only authorized users have access to perform this function.

- **New Feature: Signing – Terms and Conditions Prompt before Signing / Approving**
  Reference #: 122019.393.16

  This new feature enables clients to add a Terms and Conditions prompt on the Signature Portal, which must be accepted before Signers are able to sign a document. The system will log the date and time when the Signer accepted the Terms and Conditions and will remember they accepted if that same document is reopened.

  The Terms and Conditions content and functionality (enabled/disabled) can be configured through the system's Document Authoring App Config Settings.

  How will this affect users?
  Most End Users are not affected as only authorized users have access to perform this function.

- **Enhancement: Signing - Additional placeholder types for Doc Collab and E-Signing**
  Reference #: 122019.393.19

  The E-Signing portal has been enhanced to include additional options for signing a document. Previously, users were able to sign documents using either their stored Signature or by drawing their signature at the time of signing. With this update, there are now 7 different types of signature placeholders available:

  1) Date : Insert a Date signature (has multiple format options).
  2) Draw Signature : Draw a new signature.
  3) Initials : Type in your Initials (limited to 3 characters max).
  4) Saved Signatures : Previously saved signatures by a system user.
  5) Text : Type in additional text to add with your signature.
  6) Title : System user's title if previously saved
  7) Type Signature : Type in text as a signature.

  How will this affect users?
  End Users will have more options for signing a document through the E-Signing Portal.

- **Enhancement: DocuSign - Integration update for OAuth users - Authorize Send on Behalf**
  Reference #: 122019.564.841

  DocuSign has deprecated the Send on Behalf functionality. Clients using DocuSign's legacy authentication (username & password) are working as expected, however, those using OAuth are experiencing DocuSign errors indicating that too many tokens have been created. Contract Insight has been updated so that clients using OAuth are able to authenticate without an error from DocuSign.

  How will this affect users?
  End Users using OAuth will be able to authenticate without an error from DocuSign when signing documents from Contract Insight.

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.

- **New Feature: Integration with ProBids**
  Reference #: 122019.416.13

  An integration with ProBids is now available, enabling users to post their Sourcing requests to ProBids.

  How will this affect users?
  Most End Users are not affected as only authorized users have access to perform this function.

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: Multi-factor Authentication on the Vendor/Client Gateway**

  Reference #: 122019.362.244

  System Administrators now have the ability to enable and configure Multi-Factor Authentication (MFA) as an extra layer of verification for users creating an account on the Vendor/Client Gateway. When configured, users signing up via the Vendor/Client Gateway will be emailed a code to verify their email address is accurate. Their account will be created as normal once the emailed code is entered on the signup page.

  How will this affect users?
  Most End Users are not affected as only authorized users have access to perform this function.

- **New Feature: Mass Uploading Catalog Items via the Vendor/Client Gateway**

  Reference #: 122019.439.24

  Company Contacts can now be granted the ability to manage their company's Catalog Items through the Vendor/Client Gateway. Users with permissions will see the Manage Items top menu when they log in and will be able to either Add or Update items.

  When adding items, the user will be prompted to download a template. Once filled out, the template can be uploaded and the items will be added for review by an Administrator.

  When updating items, the user will be presented with a grid list of all items in their catalog and will be able to edit the Description, Unit Price, and Unit of Measure. Clicking the Save Changes button will update the edited items.

  Email notifications of additions and updates can be sent to an employee who has Notify If Item Added or Updated set to Yes on their Employee record.

  How will this affect users?
  Most End Users are not affected as only authorized users have access to perform this function.

- **New Feature: iCal download links for key Solicitation dates**

  Reference #: 122019.563.853

  When responding to a bid through the Vendor/Client Gateway, users will have the ability to download calendar appointments for the Bid Open/Release Date, Bid Close Date, and the

Questions Due Date. This will enable respondents to be reminded of key dates/times in the Solicitation process.

How will this affect users?
Users will be able to download appointment reminders to their calendars.

- **Enhancement: Logging of Gateway Actions**
Reference #: 122019.439.25

Actions performed in the Vendor/Client Gateway are now logged in the corresponding record's history page. The history can be accessed by going to a record within Contract Insight and selecting View History from the side menu.

How will this affect users?
Most End Users are not affected as only authorized users have access to perform this function.

- **Enhancement: Hide Survey/Response on Record Details pages**
Reference #: 122019.416.11

A new configuration setting is available for System Administrators to determine if the Surveys sections of records in the Core system as well as in the Vendor/Client Gateway are hidden if the logged-in user/vendor does not have any surveys assigned to them.

How will this affect users?
Most End Users are not affected as only authorized users have access to perform this function.

- **Resolution: Users seeing a SQL string at the top of the Company Contact page on the Vendor/Client Gateway after adding 'Is Active' field**
Reference #: 122019.439.574

Issue causing the SQL issue has been resolved and should no longer show at the top of the page.

- **Resolution: Users seeing a SQL string at the top of the Solicitation page on the Vendor/Client Gateway after adding 'Entity ID' field**
Reference #: 122019.439.252

Issue causing the SQL issue has been resolved and should no longer show at the top of the page.