CONTRACT INSIGHT
RELEASE NOTES

Version 17.5.1

Tuesday January 28, 2020

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)*
17.5.1	Wednesday January 29, 2020	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 **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.

➤ **Enhancement: Core – Enhanced Filter Control of Picklist Values**
Reference #: 012920.439.702

Dropdown type fields now show the dropdown values in a picklist instead of having to type the value.

➤ **Resolution: OCR not processing certain files as expected**
Reference #: 012920.362.1037

OCR was unable to determine which engine to use for processing when the file extension of the document was in all upper case. It has been updated to enable checking both uppercase and lowercase file extension.

➤ **Resolution: Some users able to save a record with blank required fields.**
Reference #: 012920.439.1064

Marking fields as Required via Manage/Assign Fields by Type was not working as expected and users were able to add records without completing the required fields. The issue has been resolved so that users cannot add a record unless all required fields are filled out.

➤ **Resolution: Company without an assigned record type does not appear in the Vendor/Customer List**
Reference #: 012920.416.1065

Companies added automatically were being entered without a Record Type. A new default Vendor Type called 'Company' was added for auto-Vendor-Add functionality in the system.

➤ **Resolution: Users without permission are able to add a company using 'Counterparty: Quick Add' on the VISDOM screen**
Reference #: 012920.416.1062

Users are able to review and add/update information gathered during the VISDOM process and, on this page, there is a section for 'Counterparty: Add Quick'. Page was updated to check for permissions and ensure only authorized users can add a new Company.

➤ **Resolution: Grid lines appearing on the VISDOM page headers**
Reference #: 012920.393.1058

User interface was updated to hide the grid lines.

➤ **Resolution: Mapping Tasks from one table to another using Field Mapper not working as expected**
Reference #: 012920.416.900

Users attempting to map a calculated field were experiencing an issue. Calculated fields cannot be which cannot be directly written into. Option to map to calculated field has been removed from Field Mapper.

➤ **Resolution: List of Employees/Users limited while adding to Role/Group**
Reference #: 012920.416.924

System updated to load and filter Employees/Users list as expected after clients with a larger number of Employees/Users were experiencing an issue where the inactive Employees/Users were not loading on the 2nd page of results or they would receive an error when attempting to filter the list.

➤ **Resolution: Client unable to remove a field if a linked Security Group was deleted**
Reference #: 012920.362.605

Ability to remove a field has been updated to allow deletion of the field if the linked Security Group had been deleted.

➤ **Resolution: SSO URL Directing**
Reference #: 012920.362.961

SSO logins were directing to the welcome.aspx, directing users to the calendar page. The system has been updated to now allow SSO logins to direct to default.aspx, allowing users to go to a dashboard if set.

➤ **Resolution: Record Type not passing when creating New Contract Record from a Request Record**
Reference #: 012920.362.1002

Resolved an issue where the field mapper would map the Request Type ID to the ContractAdd0.aspx and now sets the type id finding the equivalent record type when using that field mapping.

➤ **Resolution: Deleting a Question that is used on multiple Surveys from a Survey Section on one will remove it from all Surveys it is on**
Reference #: 012920.416.1023

Resolved the issue so that it specifically deletes from one survey instead of all instances of the question.

➤ **Resolution: "Inactive Login – Days until lock" not accounting for SSO logins**
Reference #: 012920.362.1031

SSO logins were not being accounted for when the system checked for the "Inactive Login – Days until lock", creating the potential for SSO users to be locked out. The system has been updated to ensure that SSO logins are now being accounted for as logins.

➤ **Resolution: Signature placeholder may be grayed out for a signer if there are multiple signers on multiple pages**
Reference #: 012920.393.957

Some signers unable to sign a document when manually navigating to their signing page if there are multiple signature placeholders for multiple signers throughout the document. Issue has been resolved so that the signer's placeholder is no longer grayed out when manually navigating to where they need to sign.

➤ **Resolution: Under specific circumstances, users unable to delete a Filter/Condition on an Ad-hoc report**
Reference #: 012920.393.958

Removing the sub-table from an Ad-hoc report before removing the related Filters/Conditions and fields was causing an issue. The Filters/Conditions need to be removed first, then the field, and then the sub-table can be removed from the Ad-Hoc report.

➤ **Resolution: Removal of the File Path Field Mapping**
Reference #: 012920.416.1024

The Field Mapper had the option to map the legacy field "File Path", since this is no longer used, this option was removed.

➤ **Resolution: Drag and Drop File Updates to Support Field Mapper**
Reference #: 012920.362.1063

Logic was added to VISDOM to prevent the overwriting of a value set by the field mapper

➤ **Resolution: Dashboard Creation and Edit Save Reminder**
Reference #: 012920.393.1066

A new notification was added on the dashboard creation and edit pages to remind users to click the save button and then the exit button rather than close the browser tab.

➤ **Resolution: Graphical Dashboard Modifications**
Reference #: 012920.393.1067

Corrected the name of a chart on an Out of the Box Graphical Dashboard and also changed the Sort order of the Out of the Box Graphical Dashboards.