CONTRACT INSIGHT
RELEASE NOTES - ADDENDUM

Version 17.5.2

Wednesday February 12, 2020

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** This document is an addendum to the Release Notes for 17.5.0 **

Release Notes – Addendum Overview

CobbleStone Software's Contract Insight addendum to 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 patch release 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)*
17.5.2	Wednesday February 12, 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.

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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 – View History Page**
Reference #: 21220.439.64

The View History page from the record Details screens has been updated to include Vendor/Client Gateway History for that record as well. There are 3 separate tabs to view All History, Contract Insight History, and Vendor/Client Gateway History.

How will this affect users?
Authorized users will now be able to view the history of the Vendor/Client Gateway actions related to the specific record.

➤ **Enhancement: Application Configuration – Logo Configuration Settings**
Reference #: 21220.393.232

System Administrators are now able to set a separate logo for the Login screen and for the Header within Contract Insight.

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

➤ **Enhancement: Permissions – Show/Hide Sub-Tables by Security Group**
Reference #: 21220.362.37

Configuration of a Security Group now includes the ability to show/hid sub-tables. When a sub-table is set to be hidden, users in that specific Security Group will no longer see that sub-table when looking at the record details page.

How will this affect users?
Only authorized users have access to perform this function and, when set, End Users will no longer see the affected sub-table.

➤ **Enhancement: VISDOM – Machine Learning Rules and Configuration**
Reference #: 21220.362.257

VISDOM has been updated to include default text extract configuration and will attempt to set common data entry fields when adding an Employee, Vendor, Purchase Order or Solicitation record with a file.

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

➤ **Enhancement: Workflow – Date Based / Time Elapsed Workflow**
Reference #: 21220.337.74

Workflow has been enhanced to enable configuration for checking conditions based on a schedule in addition to the traditional event triggers.

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

➤ **Resolution: Dragging files to another File Folders/Attachments folder when browser is zoomed in/out**
Reference #: 21220.337.592

Some users were unable to drag a file to a different folder in the File Folders structure when they were zoomed in/out on the page.

➤ **Resolution: View Text/Compare Window**
Reference #: 21220.393.1070

When using the View Text/Compare functionality from the Document Toolbox, some users were not seeing the view screen at the full window height. Update has been made to open the View Text/Compare window in line with the height of the browser window.

➤ **Resolution: List manager IDs as Decimals**
Reference #: 021220.377.1139

IDs were appearing as decimals instead of integers for Category, Location, or Occurrence on the list manager pages.

➤ **Resolution: Ad-Hoc report "Status ID" filter**
Reference #: 021220.439.1144

When using 'Status ID' as a Filter/Condition on an Ad-Hoc report, the dropdown item name was not converting to the equivalent ID for proper filtering.

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➤ **Resolution:** "**Budget/Funding Line Items" table view size**
Reference #: 021220.416.1178

Users with more than one hundred (100) line items in the Budget/Funding Line Items table on a record were unable to change the number of line items viewable at one time on the screen.

➤ **Resolution: Contract one-off task start date/end date**
Reference #: 021220.362.1194

Users were able to create a one-off Task on a Contract record with the End Date of the Task occurring before the Start Date. Preventative measures were put in place to check the dates when attempting to Save the Task.

➤ **Resolution: Drag and Drop OCR double click**
Reference #: 021220.393.1198

When using the Drag and Drop functionality, the dragged document would not run through the OCR process if the user double-clicked the Record Type they wanted to create. Updated the system so users are only able to click on the Record Type once.

➤ **Resolution: GdPicture Updated to 14.0.0.12**
Reference #: 21220.393.1078

Updated GdPicture to 14.0.0.12 within appropriate areas of Contract Insight.

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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.

➤ **Resolution: Sign Now Saved Signatures Draw Box**
   Reference #: 21220.393.1072

   Users attempting to save a drawn signature with the Signature Type set to Saved Signatures were unable to save the newly drawn signature. System updated to default to a different Signature Type if there were no Saved Signatures to choose from.

➤ **Resolution: Document Package custom style for table of contents**
   Reference #: 021220.337.1191

   Documents containing a custom style for the table of contents would not merge onto a record correctly. An update was made to the Document Template creation process to ask if the Table of Contents should be force updated when being merged onto a record.

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:** '**Assign Respondents' side menu item on e-Sourcing record**
   Reference #: 021220.362.1133

   Resolved an issue when attempting to assign respondents to a solicitation via the side menu item, users would be redirected to a link not pulling any results for searches.

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: Document Package using a Word Doc with a generated content**
   Reference #: 0212200.393.1177

   Resolved an issue when creating or editing a document package and attempting to upload a new version of a document that has generated content, such as a table of contents, would cause an issue and the file could not be uploaded.

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➤ **Resolution:** **Editing Solicitation fields on Vendor/Client Gateway**
Reference #: 021220.439.1200

Under certain circumstances, some Solicitation date fields were marked as being editable via the Vendor/Client Gateway even though, by default, they should not be. Update put in to remove any checks enabling the Date fields to be edited on the Vendor/Client Gateway.

Connector: Single Sign-On (SSO) Authentication

Optional Add-On Connector that provides your organization with the ability to use a third-party identity provider (such as ADFS, Ping, or other SAML 2.0 compliant providers) for a single sign-on authentication into your Contract Insight application.

➤ **Resolution:** **SSO – Just In Time fixes**
Reference #: 021220.362.1141

Various fixes for the Just In Time SSO, including the XLST parser handling multiple attribute values, Licensing related failures causing duplicate entries, and "Contains" not functioning correctly in rules.

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