



COBBLESTONE
SOFTWARE

CONTRACT INSIGHT PATCH NOTES

Version 17.5.4 - *Addendum to 17.5.0*
February 29, 2020

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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 (<i>from prior release</i>)
17.5.4	February 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: Visdom - OCR Dialog Box**

Reference #: 22920.337.1291

The OCR dialog box showing the progress of the text extraction has been updated to include additional status text to describe each of the text extraction functions.

How will this affect users?

Authorized users will be able to see which part of the text extraction process their document is going through in the system.

➤ **Resolution: Selecting 'View' or 'View/Manage' within Application Maintenance would open the window within the section frame**

Reference #: 22920.416.1297

Selecting 'View' or 'View/Manage' within Application Maintenance will now open the window in a new tab.

➤ **Resolution: Visdom text extraction around a marker option unavailable**

Reference #: 22920.362.1264

Updated Visdom to include ability to extract text around a marker.

➤ **Resolution: Fields duplicated when selecting 'View Requests'**

Reference #: 22920.439.1195

Fields appeared to be duplicated when selecting 'View Requests' and the issue has been resolved so only one of each field is showing.

➤ **Resolution: Preview was blank when setting filters/conditions on an Ad-Hoc report**

Reference #: 22920.439.1273

Results for Ad-Hoc reports with Filters/Conditions were available but not showing on the Preview. Issue has been resolved so the results are visible when previewing the set Filters/Conditions.

➤ **Resolution: Request ID displaying as a decimal when viewing the Request List**

Reference #: 22920.445.1227

When viewing the Request List, the Request ID would be displaying as a decimal. This has been fixed so the Request ID displays as an integer as expected.

- **Resolution: Sub-table fields on Contract Details showing according to Order Number**
Reference #: 22920.439.1292

Resolved the issue so sub-table fields on the Contract Details page are ordered based on Field Grouping then Order Number

- **Resolution: Visdom not setting values for autocomplete dropdowns**
Reference #: 22920.362.1289

Visdom was updated to enable setting values for fields that are a dropdown that auto-completes.

- **Resolution: Visdom result not being returned to a page under certain circumstances**
Reference #: 22920.362.1255

Updated Text Extract By Marker and Clause Extraction to return a result when run.

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: Document Templates – Default sorting of attachments**
Reference #: 22920.337.1291

The attachments section of Document Templates has been updated to sort the attachments as chronologically descending, showing the most recent published attachment at the top of the list.

How will this affect users?

Authorized users will easily see which attachment is the most recent published version.

- **Resolution: Users attempting to create rules on a Document Template Mergeable Clause prior to adding fields receiving an error**
Reference #: 22920.393.1223

Users attempting to create rules on a Document Template Mergeable Clause prior to adding fields receive a generic error. Updated the issue so that the error message states that fields need to be selected prior to adding rules.

- **Resolution: E-Signature Saved Signatures not attaching to document when selecting Sign Now**
Reference #: 22920.393.1212

Resolved the issue so the Saved Signature is saved along with the document when selecting Sign Now.

➤ **Resolution: Date Updated does not change when the Status field is updated via completing a signing/Approving process**

Reference #: 22920.337.1213

Users with a Document Template Signature/Approval Process updating the Status of a record upon completion will now see the date change reflected in the Date Updated field on the record.

➤ **Resolution: DocuSign 'Sign On Behalf Of' Updates**

Reference #: 22920.362.1236

Additional updates made for DocuSign's 'Sign On Behalf Of' process to ensure that the necessary keys are passed from CobbleStone Software to DocuSign for the signing process.

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: CSSE: Error message when creating a PO**

Reference #: 22920.377.1281

Removed the minqtywarning field from the purchase orders information due to creating errors as it was an unused and unreferenced field.

➤ **Resolution: VULPEN: ShoppingCart.aspx - Active Mixed Content Vulnerability**

Reference #: 22920.337.1268

When using a HTTPS connection, loading the ShoppingCart.aspx created a vulnerability due to referencing old jquery versions.

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.

➤ **Enhancement: Map Sub Tables and Fields to Gateway when Creating new sub table/Field**

Reference #: 22920.439.1293

While creating a new table if user selects Is Table Data editable via the Collaboration to Yes and table is not a standalone table. Then default fields will get mapped to Gateway fields. While creating new field, if selected table is Editable via Gateway is Yes, then user will get an option to set that field for gateway use.

How will this affect users?

End Users are not affected as only system administrators can perform this function

➤ **Resolution: 'Manage Gateway Fields' by type not displaying in the Available Fields column after being removed from the Assigned Fields column**

Reference #: 22920.393.1300

Resolved an issue so that the Available Fields list refreshes and shows a field that was removed from the Assigned Fields column.

➤ **Resolution: Sub-table entries on a record in the Vendor Client Gateway are not visible**

Reference #: 22920.439.1226

Issue has been resolved so that entries in a sub-table on the Vendor Client Gateway are now visible.

➤ **Resolution: Active Vendor Contacts are able to log in to the Vendor Client Gateway if their Vendor Record is deleted**

Reference #: 22920.439.1280

Vendor Contacts that were still marked as active were able to log into the Vendor Client Gateway when their Vendor record was deleted. Issue has been resolved so that when a Vendor record is deleted, any contacts associated to that record will be unable to log into the Vendor Client Gateway.

➤ **Resolution: Redirect legacy Manage Gateway Fields page**

Reference #: 22920.439.1294

Updated the legacy Manage Gateway Fields page to redirect to the new Manage Gateway Fields page.