COBBLESTONE
SOFTWARE

CONTRACT INSIGHT
RELEASE NOTES

Version 17.7.0 (rev 200821)

Friday August 21, 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)*
17.7.0 (rev 200821)	Friday August 21, 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 **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: Add new information in-line on when creating new records**
  Reference #: 200821.439.1048

  While adding a new Record in the system, users with access will be able to add new reference data information, such as Department, Location, or Status, directly from the Record Add screen. Clicking the + sign next to one of these fields will open a pop-up window where the user can enter information for the new reference data. Once the information is completed in the pop-up window and saved, the Record Add screen will reload and populate the newly added reference data in the associated field. Note that this functionality only appears for users who have permissions to add the new information in the system.

  How will this affect users?
  Users with permission will be able to add new data (such as Department, Company/Vendor, Location) directly on a Record Add screen.

- **Enhancement: Improved Effective/Expiration Date error message**
  Reference #: 200821.439.760

  The generic error message occurring when attempting to save a Contract with an Expiration Date set *prior to* the Effective Date has been updated to specify exactly what the issue is that needs to be resolved before being able to save.

  How will this affect users?
  Users with permissions to add or edit Contract information will receive a clear error message if attempting to save a Contract record where the Expiration Date is before the Effective Date.

- **Enhancement: "Add All" link for Fields by Type**
  Reference #: 200821.439.726

  A new Add All link has been created for assigning all fields when configuring Fields by Type in the Field Manager. This will simplify the process when all but a few fields need to be assigned to a specific Record Type.

  How will this affect users?
  End users are not affected as only System Administrators can use this functionality.

- **Enhancement: View History enabled for fields in the Field Manager**
  Reference #: 200821.439.722

  System Administrators will now be able to view the history of a specific field via the Field Manager. When viewing the Field Details page, click View Field History in the side menu to view updates to the field such as when it was added or changed. As with other history logs, the Field History log can be Exported to Excel.

  How will this affect users?
  End users are not affected as only System Administrators can use this functionality.

- **Enhancement: Clause Identification and Extraction**
  Reference #: 200821.362.778

  This enhancement adds additional machine learning processes to locate common clauses within a document on the Add screen. The text may be extracted to a field on the record, to the clause library, or added to the training data to improve future clause recognition. Extracted data may assist in improving data entry accuracy or could be used for reporting or workflow. This feature must be enabled in the Visdom Configuration manager, but no additional set up is required. This release of Contract Insight includes pre-trained data for locating fifteen common clauses.

  How will this affect users?
  Users with access will be able to automatically locate and optionally extract information when creating a new record from an uploaded file.

- **Enhancement: Increase max character length for Permission name**
  Reference #: 200821.337.738

  This enhancement lengthened the maximum allowable characters for Permission Names when creating a user defined permission.

  How will this affect users?
  End users are not affected as only System Administrators can use this functionality.

- **Enhancement: Ability to configure 'copy attachment' settings when creating a new record from an existing record**
  Reference #: 200821.416.969

  Previously, an Application Configuration setting could be enabled to allow users to manually select specific attachments when creating a new Contract record from a Request record. This configuration has been moved to the Field Mapper page to expand the ability to setup this functionality between additional types of records.

  When mapping attachment fields, System Administrators will be able to choose whether to automatically transfer all attachments to the new record or to allow the user to manually select the files to be transferred.

How will this affect users?

Only System Administrators are able configure this setting. Depending on the configuration, End Users with permission to create new records from an existing record will either be presented with a page to select attachments to copy over or all attachments will carry over.

- **Resolution: "Contracts: Attachments - Prevent Downloading" permission not working for file types that cannot be previewed**

  Reference #: 200821.337.1991

  Users without access to download attachments were presented with a download link while attempting to view specific file types that could not be previewed. The system has been updated to extend this permission to file types that cannot render a Preview.

- **Resolution: Add Subtable entry on Add screens not formatting field types correctly**

  Reference #: 200821.439.1990

  When adding a subtable entry from a record Add screen, the Decimal4 field was removing all numbers after the first 2 decimal places. After saving, the subtable entry shows the removed numbers as zeros.

  Also, after saving, drop-down fields with Yes,No as options were showing as 0 or 1 in the table on the Details screen.

  Both field types have been updated to show correctly when added via a record Add screen.

- **Resolution: On-screen rendering of a Contract record altered when adding a large HTML email**

  Reference #: 200821.416.2013

  Adding a large HTML email to the Notes section of a Contract record was altering the on-screen rendering of the record itself. Issue was resolved so the Contract record could be viewed as expected.

- **Resolution: Assigning System Dashboard to a Security Group does not change the assigned users' Default Dashboard**

  Reference #: 200821.416.2042

  After assigning a default system dashboard to a Security Group, users belonging in that Security Group did not see the dashboard as their default. This was updated so, if assigned, users see the Security Group's default system dashboard.

- **Resolution: Audit logs not logging deletion of a subtable entry**
  Reference #: 200821.439.2143

  Deleting a subtable entry from any record type was not being recorded into the history log. This has been resolved so that an entry is added to the history stating that a subtable entry was deleted.

- **Resolution: Data Import Manager showing as successful but is not**
  Reference #: 200821.362.1998

  Data Import Manager status icon was showing imports as successful but imported data was missing from the system. The icons were updated and are now showing as expected based in the import result status.

- **Resolution: EZ Ad-hoc Report available for Dashboard even if it was not saved**
  Reference #: 200821.486.2108

  EZ Ad-hoc Reports not configured to be saved would still be available for selection on Dashboards. This has been fixed so that, if 'Save Report for Later' is not checked when creating a new EZ Ad-hoc Report, it will not be available for use on Dashboards.

- **Resolution: EZ Ad-hoc Report filter/condition does not allow for selection of standard drop-down values**
  Reference #: 200821.439.2111

  Users were unable to select a drop-down value when using standard user-created drop-down fields used as conditions/filters on an EZ Ad-hoc Report. This has been fixed so that users can select a specific value from the drop-down field.

- **Resolution: Field Manager for Employee Details table does not include 'Show on Email Alerts'**
  Reference #: 200821.439.2120

  When managing fields for the Employee Details table, the option to include 'Show on Email Alerts' was not available. The functionality was added so that fields from the Employee Details table can be shown in emailed alerts.

- **Resolution: Fields used on Vendor/Customer List view are not available for use for show/hide fields in Field Manager**
  Reference #: 200821.439.2144

  When attempting to create a show/hide field condition on a field in the Vendor/Customer table, users were not seeing certain fields in the list of Parent Fields. It was determined that, if the field was being used on the Vendor/Customer List view, it was not showing in the Parent drop-down table for a field in the Field Manager.

- **Resolution: Record ID field on Find/Search screens are including a comma for larger ID numbers**
  Reference #: 200821.486.2015

  Record IDs over 3 characters in length would include a comma on Find/Search lists. This has been updated to only show the numbers and exclude the comma.

- **Resolution: Language selected showing as GUID in Employee List grid**
  Reference #: 200821.486.2043

  The Language field would display the GUID instead of the language name on the Employee List grid. The field is now showing the name of the language as expected.

- **Resolution: Manually OCR a file on Request, go back to it and file name is different**
  Reference #: 200821.362.2037

  After manually running the OCR process using a file on a Request record, when the user went back to view the file, the file name was different. The issue was resolved so that the proper file name is being shown.

- **Resolution: System Alerts on Employee, Vendor, and Vendor Contact records**
  Reference #: 200821.416.2130

  System Alerts on Employee, Vendor, and Vendor Contact records have been updated and the ‘User does not have a default dashboard.’ alert has been reconfigured to not show when a default dashboard is assigned as part of an Employee/Role Group or Security Group.

- **Resolution: A field’s show/hide conditions spanning multiple pages are not viewable past the first page**
  Reference #: 200821.486.1994

  A field’s show/hide conditions were not viewable past the first page of conditions. Users are now able to view multiple pages of show/hide conditions on a field.

- **Resolution: Columns on the Workflow List view unable to be rearranged**
  Reference #: 200821.486.2142

  Managing columns on the Workflow List was not reflecting the desired column order when returning to the Workflow List view. The issue has been resolved so that the order of columns is in line with the Manage Columns settings.

- **Resolution: Creating a template for Bulk Add is expecting required fields to be populated**
  Reference #: 200821.439.2005

  Required fields on a Bulk Add Template were being required both when creating a template and when using the template on a record. The functionality was updated so that required fields only require a value when the Bulk Add Template is being used on a record.

- **Resolution: 'Return to Financials' side menu item redirecting to Contract Details**
  Reference #: 200821.416.2012

  The Return to Financials link on the side menu of the Contract Financials Details page was redirecting users back to the Contract Details page. This was update so users would be returned to the Contract Financials Details page.

- **Resolution: Show/hide fields with multiple conditions not working on Edit screens**
  Reference #: 200821.439.1989

  Fields configured to show or hide based on multiple conditions were not showing or hiding on a record's Edit screen. The issue has been resolved so the fields show or hide as expected.

- **Resolution: Subtables Displaying in Incorrect Order**
  Reference #: 200821.439.2073

  Subtables were displaying in a random order on the record Details screens. The issue was resolved, and the subtables display in the expected alphabetical order.

- **Resolution: Task status links for all tasks on a Request appear after user adds a note**
  Reference #: 200821.486.2074

  After adding a Note on a Request record, the Status links for all Tasks would appear in the Task Grid. While not usable, this gave the appearance that Tasks assigned to another user or previously completed Tasks could be updated. The links no longer appear after a note has been added to a Request record.

- **Resolution: Fields can be deleted without removing them from show/hide conditions**
  Reference #: 200821.439.2001

  Fields used as part of a show/hide condition could be deleted without removing the conditions first. An error would occur when the condition attempted to activate on a record. The functionality has been updated so that users are unable to delete a field if it is used in a show/hide condition.

- **Resolution: Document Tools pop-up jumps to bottom of the page on Requests and Contracts**
  Reference #: 200821.486.2117

  Users were experiencing an issue where, at seemingly random times, the Document Tools pop-up window would jump to the bottom of the page on Request and Contract records. The possible cause of the issue was resolved.

- **Resolution: Subtables prevented from adding a Task for Time Elapsed workflows**
  Reference #: 200821.362.2180

  Tasks for subtables were not being added to a record when using Time Elapsed workflows. The issue was resolved so that subtable Tasks are added as expected when using Time Elapsed workflows.

- **Resolution: Date field(s) for Add Bulk to subtable defaulting to 1/1/1900 if left blank**
  Reference #: 200821.439.2182

  If a date field was left blank when adding bulk items to a subtable, the field was automatically populating with 1/1/1900. The date fields have been updated so it remains blank if not populated.

- **Resolution: Required show/hide fields showing Alert/Validation message when hidden**
  Reference #: 200821.439.2196

  Alert/Validation messages were being shown on a record when a required show/hide field was hidden and not populated. This has been resolved to check if the required field is hidden and, if so, to hide the Alert/Validation message.

- **Resolution: Decision Matrix list disappears when switching grid pages**
  Reference #: 200821.486.2189

  On a multiple page Decision Matrix List, the grid would disappear when attempting to switch to another page. The issue has been resolved so that each page of results can be viewed.

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: Display 'Created By' on Approval Processes & Signature Processes lists**
  Reference #: 200821.337.732

  Users with permission will now see the 'Created By' field when viewing the list of Approval Processes or Signature Processes. This will quickly show the user who created the process.

  How will this affect users?
  Users with access will be able to easily see who created an Approval or Signature Process

- **Enhancement: Expanded width of drop-down boxes on Merge Document Templates pages**
  Reference #: 200821.337.730

  When merging a Document Template onto a record, the drop-down boxes on the initial Create New Document Package and Create New Third Party Paper Package screens have been widened so longer template names are more visible.

  How will this affect users?
  Users with permissions to merge a Document Template will see more characters of template names that are longer.

- **Enhancement: Rename 'Add Clause' button to 'Assign Clause'**
  Reference #: 200821.337.789

  The button for adding Mergeable Clauses to a document template has been renamed to 'Assign Clause'.

  How will this affect users?
  Users are not affected by this enhancement as functionality was not altered.

- **Enhancement: Show "Date Updated" on Template list**
  Reference #: 200821.337.710

  The Document Authoring Template List now includes the "Date Updated" column to easily see the last time the template was updated.

  How will this affect users?
  End Users are not affected by this enhancement as only System Administrators can view the Template list.

- **Resolution: Clause Analysis page showing error**
  Reference #: 200821.337.1995

  Users accessing the Clause Analysis page were receiving an error which prevented results from being displayed. The issue causing the error has been resolved and users should be able to perform the Clause Analysis as expected.

- **Resolution: IntelliSign 'Re-send' not working for non-employee users**
  Reference #: 200821.486.2044

  Using the Re-send button to resend notifications for signing a document through IntelliSign were not being sent to non-employee users. The button has been updated so that, when clicked, the notification is being set to non-employee users in addition to employees.

- **Resolution: IntelliSign Signature Completion email not being sent to Company participants**
  Reference #: 200821.486.2123

  The notification to all signers that the IntelliSign process was complete was being sent to all Participant types except for Company signers. The issue was resolved and now all signers are receiving the Signature Process Successfully Completed notification.

- **Resolution: E-Signature Reminders to Sign still being sent even though the signing was completed or rejected**
  Reference #: 200821.486.2121

  After rejecting or completing an E-Signature process, reminders to sign were still being sent to users. The functionality was updated so that reminders will only be sent if the E-Signature process is still active.

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.

- **Enhancement: Bid Tabulation**
  Reference #: 200821.416.799

  Required Pricing Line Items questions, Individual Respondent Reports, and Bid Tabulation Reports have been added to a new Survey Review page. On the Survey Review page, there is a new drop-down with which you can select an individual respondent and view all their answers.

  Also, when reviewing a survey, you can click the new "Generate Bid Tabulation Report for Pricing Line Items" button to view a report that shows all the respondents' answers organized by individual pricing line items. Each item will display its own grid, with each bidder's response values.

  How will this affect users?
  Users with permission will have better ways to review answers to surveys submitted by respondents, especially regarding Pricing Line Item responses.

- **Enhancement: Spend Analytics**
  Reference #: 200821.416.809

  A link has been added to the Contract Details side menu called "Run Spend Analysis" to allow a System Administrator to run an instant analysis of spending metrics for that contract against all others in the system.

  The page has also been visually adjusted to match the rest of the system and make the process flow a little smoother.

  How will this affect users?
  Users with permission will be able to run an instant analysis of spending metrics for a specific contract against all others in the system.

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: Pre-Release Public Bid View**

  Reference #: 200821.439.1670

  A new 'Search Upcoming Solicitations' view is available on the Vendor/Client Collaboration Gateway to allow viewing of configured Public bids prior to the Bid Open Date. When creating a Public e-Sourcing record, switch the new "Show Pre-Release" field to 'yes' (from the default of 'no') to enable showing on the Gateway. Once the Bid Open Date arrives, the bid will move to the 'Search Public Solicitations' view.

  Note: If the "Show Pre-Release" field is not on the e-Sourcing Add or Details screen, ensure the field is assigned to the specific e-Sourcing type being used.

  How will this affect users?
  Clients and Vendors accessing the Vendor/Client Gateway will be able to see upcoming public solicitations.

- **Resolution: Assigning/Removing fields from Manage Gateway fields not functioning properly**

  Reference #: 200821.416.2115

  When attempting to add or remove a field for a Solicitation on the Vendor/Client Gateway, additional fields would be pulled to the Assigned Fields or Available Fields columns and newly assigned fields would not be saved. Issue has been resolved so the Manage Gateway Fields by Type functions as expected when configuring Solicitation Details for the Vendor/Client Gateway.

Module: Database Integration Manager

Optional Add-On Module that provides a middleware web application module used to create scheduled template driven integrations between Contract Insight's Web APIs and your organization's other 3rd party software platforms. This module is typically housed in your organization's DMZ.

- **Enhancement: REST API Updates**
  Reference #: 200821.422.1623

  The REST API integration has been updated to support file upload and download. Another endpoint has also been added to get a list of all entities with the following flags: Allow edit via API, Allow add via API, and Allow view via API.

  How will this affect users?
  Users of our REST API will have additional options for their integrations with CobbleStone Software.