



COBBLESTONE
SOFTWARE

CONTRACT INSIGHT PATCH NOTES

Version 17.7.1 (rev 201015)
Thursday October 15, 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 (<i>from prior release</i>)
17.7.1 (Rev 201015)	Thursday October 15, 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 **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: Wizard Add Screens**

Reference #: 201015.337.2413

This new feature provides functionality on Contracts, Requests, Vendors, and Solicitations (if licensed) to configure various record types to use a wizard-based approach for adding new records instead of the single page top-down add screen. If a record type is configured/set to enable adding from a wizard, the add screen will create a wizard based off of the field groups included on the record type, each field group becoming a separate "tab" or "step" in the wizard.

How will this affect users?

For record types configured as such, users will be able to work with a wizard-based approach to adding records to these main areas.

➤ **New Feature: Ability to change File Name in the Files / Attachments area**

Reference #: 201015.486.973

Users with access can update the file name of a Record's attachment using the Manage option in the Document Toolbox. The file name change is recorded in the History log and includes the previous file name as well as the updated name.

How will this affect users?

Enables users with access to change a file name right in the system without having to download to their computer first.

➤ **Enhancement: History page for Reporting**

Reference #: 201015.486.38

A history page has been added for Reporting. Similar to other history pages, the Reporting history page will log when a report was viewed as well as logging updates made to Ad-hoc reports.

How will this affect users?

Users with access can view the history log of reports they manage.

➤ **Enhancement: Multi-select list boxes in Subtables on Record Add and Bulk Add screens**

Reference #: 201015.439.2299

Users can now see and choose from all options present for multi-select list boxes in subtables when adding entries via a Record Add screen or the subtable Bulk Add screen.

How will this affect users?

Users will not need to edit each individual subtable entry to choose options from a multi-select list box.

➤ **Enhancement: Additional Natural Language Processing (NLP) Training Data**

Reference #: 201015.362.2407

This enhancement adds a 'Preamble' category to the Category Training Data for Natural Language Processing. Training data was also included which can locate the paragraph containing the counter parties as well as the Effective Date, which is often located in the Preamble.

How will this affect users?

Counter party and date algorithms can be run on just the preamble paragraph which should improve the returned results.

➤ **Resolution: Recurring Tasks on Employee Records show same End Date**

Reference #: 201015.445.2320

Tasks set up to recur on an Employee Record were showing the same End Date. This has been resolved so that the End Date is reflected properly based on the recurrence selected.

➤ **Resolution: Users able to see Requests outside of their Department**

Reference #: 201015.377.2321

Some users with View Department records permissions for Requests were able to see records outside of their assigned Department(s). These permissions have been updated to ensure users only see records that are part of their Department(s).

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: 'Return to Record' button for internal users on Signing Portal grayed out**

Reference #: 201015.486.2211

Internal users were unable to use the 'Return to Record' button on the Signing Portal to return to the record within Contract Insight. Issue has been resolved so that the button is no longer grayed out and functions as expected.

➤ **Resolution: Final PDF after E-Sign not ordered by Sequence**

Reference #: 201015.416.2247

Documents configured to automatically attach to a Record as a single PDF were not in the correct sequence in the final PDF. This has been resolved so that the documents are shown in the PDF in sequential order after signing.

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: System Dashboards for the Vendor/Client Gateway**

Reference #: 201015.416.2055

System Administrators can now create System Dashboards for use on the Vendor/Client Gateway. Like System Dashboards in the Core system, System Dashboards on the Vendor/Client Gateway allow System Administrators to build and specify Dashboards for Vendors to ensure they see and have access to reports and other docks created.

How will this affect users?

If configured by a System Administrator, Vendors with access to the Vendor/Client Gateway will be able to see a dashboard of reports and docks with information pertaining to their company.

➤ **New Feature: Reports for the Vendor/Client Gateway**

Reference #: 201015.416.2054

System Administrations now have the ability to create Ad-Hoc or Report Designer Reports for Gateway or Public viewing. There are 3 'Report Gateway Types' to choose from when creating a report: Internal, Gateway, and Public.

Reports marked as 'Internal' will only be available to run for users logged in to the Core system. Ad-Hoc reports will show all data configured to appear in the report.

Reports marked as 'Gateway' will only be available to run for users logged in to the Vendor/Client Gateway. Ad-Hoc reports will show the logged in Vendor records pertaining to their company.

Reports marked as 'Public' can be run by anyone without being logged in to the Vendor/Client Gateway. Ad-Hoc reports will show all data configured to appear in the report, regardless of the Vendor.

As with the Core system, Report Designer reports will not enforce application user permissions without the appropriate filters defined within the report.

How will this affect users?

If configured by a System Administrator, Vendors with access to the Vendor/Client Gateway will be able to view reports that are Public or assigned to their company.

➤ New Feature: Create a Request from a Request

Reference #: 201015.439.2047

If configured to do so, Vendors are able to create a new Request record from an existing Request record. This needs to be configured on the Manage Gateway Fields page by a System Administrator for each Request Type.

How will this affect users?

Vendors can create a new Request record for specific Request Types configured by a System Administrator.

➤ New Feature: Create a Request from a Contract Record

Reference #: 201015.439.2045

If configured to do so, Vendors are able to create a new Request record from an existing Contract record. This needs to be configured by a System Administrator in two areas:

- On the Manage Gateway Fields page to select each Request Type that can be created in the Vendor/Client Gateway
- On the Field Mapper by choosing the 'Gateway' option then configuring the fields to carry over from the Contract Record to the new Request Record

How will this affect users?

Vendors can create a new Request record from an existing Contract record for specific Request Types configured by a System Administrator.

➤ **New Feature: Display linked contracts on VCG Contract Record**

Reference #: 201015.439.2046

A new table has been added to the bottom of the Vendor/Client Gateway Contract records called 'Linked and Associated Contracts'. This table will show a logged in Vendor any of their Contracts that are linked to the Contract they are viewing.

How will this affect users?

Vendors will easily see any of their Contracts that are linked to the Contract record they are viewing.

➤ **New Feature: Bulk Add Template on Sub Tables**

Reference #: 201015.439.2278

As in the Core system, Vendors can now add Subtable entries in bulk on the Vendor/Client Gateway. System Administrators can configure the template for Bulk Add on the Gateway and determine which fields will be locked in the template to prevent editing.

How will this affect users?

Vendors can Bulk Add entries into a Subtable on the Vendor/Client Gateway if configured by a System Administrator.

➤ **New Feature: Enable SAML 2.0 authentication with PING Federate through Vendor Gateway**

Reference #: 201015.362.2057

Single Sign On has been updated to work with the Vendor Client Gateway. This update also adds support for multiple active IDP certificates.

The Vendor Client Gateway can be configured to use SAML or ADFS as an authentication method. The gateway can also use JIT processing to add users and company records on demand. Additional updates to SSO allow for multiple active certificates. This will allow administrators to upload replacement certificates in advance to minimize downtime.

How will this affect users?

Vendor/Client Gateway can now be configured to permit login via an existing identity authentication provider

➤ **Resolution: Vendor ID being added to log**

Reference #: 201015.377.2408

When vendors would log in to the Vendor Client Gateway, their Vendor ID was being added to a log meant for Employee IDs. The logging has been resolved to track logs from internal users and external contacts.

Connector: External E-Sign Integrations

Optional Add-On Connector that provides your organization with the capability of electronic/digital signing of documents/contracts. Currently this connector is configured for integrations with DocuSign & Adobe Sign.

➤ **Enhancement: External E-Sign Status Report**

Reference #: 201015.362.772

A new report has been added to list all records that have an associated record with an E-Sign vendor (DocuSign or Adobe Sign). The report provides status information and links to the CobbleStone Contract, Request or Sourcing record.

How will this affect users?

End users can easily locate and see the status of records associated with E-Sign Vendors.