COBBLESTONE
SOFTWARE

CONTRACT INSIGHT
RELEASE NOTES

Version 17.8.0 (rev 210120)

Wednesday January 20, 2021

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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)*
17.8.0 (Rev 210120)	Wednesday January 20, 2021	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: Alerts and Notification Engine**
  Reference #: 210120.486.75

  Working in conjunction with the existing out-of-the-box system notifications (such as the Contract Expiration Date Alert and Task Notifications), the new Alerts and Notification Engine allows users with permission to create customized versions of the existing out-of-the-box system notifications at the application level.

  Note that the customized notifications are not stand-alone notifications. Conditions for triggering both the existing out-of-the-box system notification ***and*** the customized notification must be met for the customized notification to be sent. Otherwise, the existing out-of-the-box notification will be used. At this time, notification templates are triggered at the application level and not by each notification template.

  The initial release of this feature allows application-level configuration of system notifications from Contracts and eSourcing records as well as Tasks for Contracts, Solicitations, POs, and Vendor/Customer. A future release will expand this feature to template level configuration as well as additional out-of-the-box system notifications.

  Permission to view and/or manage this functionality is granted using the existing Workflow permissions in the system.

  How will this affect users?
  End Users with permission will be able to configure customized application-level notifications to be sent in place of the standard out-of-the-box system notifications.

- **New Feature: Duplicate record entry check**
  Reference #: 210120.439.615

  If configured, this new feature checks if fields set as 'Mark as Unique' match an existing record when a user attempts to add a new record into the system. System Administrators can configure fields set to 'Mark as Unique' through either the Field Manager (for individual fields across all record types) or Manage Fields by Type (for fields assigned to a specific record type). Note that if multiple fields are set to 'Mark as Unique', all of them will need to be an exact match to be flagged.

  For records already existing in the system, an alert will be displayed at the top of the Record Details page if any records match the field(s) marked as being unique.

  How will this affect users?
  End Users are not affected by this new feature as it may only be configured by a System Administrator.

- **New Feature: Permission based ratings/reviews on Surveys**
  Reference #: 210120.416.776

  On the new Survey Review page, users with permission can leave ratings and comments on each section of a completed Survey. Reviewers cannot see other section reviews until they have submitted their own and, once submitted, their review cannot be altered. This helps reduce bias from seeing other reviews prior to leaving their own. Reviews are structured as a collection of ratings, 1 set by the reviewer for each respondent, and a comment with any additional info.

  How will this affect users?
  End Users with permission will be able to leave ratings and comments.

- **Enhancement: Clause Analysis tool added to main menu area**
  Reference #: 210120.486.2428

  The Clause Analysis tool can now be accessed from the main menu under Negotiations. This tool enables users to run a search of Mergeable Clauses for each area of the system using a specified date range. Users will be able to view and export the Clause ID, Clause Alterations, Clause Merges, Mergeable Clause (title), and Description.

  How will this affect users?
  End Users with access will be able to view/export the search results.

- **Enhancement: 'Precedence' clause training data added for Natural Language Processing**
  Reference #: 210120.362.2438

  Natural Language Processing (NLP) training data was added for the Precedence clause. This facilitates the system's ability to look for a Precedence clause in files added to the system using VISDOM®. Note that users will still need to train the system to continuously improve VISDOM's clause recognition.

  How will this affect users?
  End Users are not affected as VISDOM® configuration is managed by System Administrators.

- **Enhancement: Select subtable line items to include when creating a new record from Request**
  Reference #: 210120.416.2099

  While configuring subtable field mappings when using the Field Mapper, System Administrators can now set whether to automatically copy all subtable rows to a new record or to allow the user to select individual subtable rows to copy.

  How will this affect users?
  End Users will be presented with the option configured by a System Administrator.

Enhancement: Enhanced message on Document Templates
Reference #: 210120.486.779

When attempting to add Rules to a Document Template prior to adding mergeable fields, users will now be presented with an error message stating that mergeable fields are required prior to setting up Rules.

How will this affect users?
End users with access to create Document Templates will seen a descriptive error message when attempting to add Rules prior to adding mergeable fields.

Enhancement: Disable delete ability for Record Types being used on a record
Reference #: 210120.416.1894

System Administrators will no longer have the ability to delete a Record Type if records exist using that type. When records exist for a specific Record Type, the 'Delete' button on the Record Type manager will be grayed out.

How will this affect users?
End Users are not affected by this enhancement as only System Administrators have the ability to manage Record Types.

Enhancement: Dashboard 'Manage Docks & Tiles' accessible from the side menu
Reference #: 210120.416.1204

The Manage Docks & Tiles option for user-created Dashboards can now be found in the side menu while viewing the Dashboard. This can also still be accessed by clicking the Layout button next to a Dashboard in the My Dashboard Manager.

How will this affect users?
End Users can quickly access the Manage Docks & Tiles menu to update the user-created Dashboard being viewed.

Enhancement: Drag and Drop functionality for the Document Library
Reference #: 210120.486.766

Adding new files to the Document Library has been made even easier by extending the Drag and Drop feature to the Upload section. Users can simply drag one or more file(s) to the Drop Files Here area and they will automatically be uploaded to the Document Library.

How will this affect users?
End Users with access to the Document Library can easily upload one or more documents by dragging from a folder on their computer to the Drop Files Here area of the Document Library.

- **Enhancement: Configuration setting for creation of a Task from the Email Drop Box**
  Reference #: 210120.337.2573

  A new Configuration setting has been added to the Application Configuration to Enable or Disable creation of a Task when an email is pulled onto a record from the Email Drop Box.

  How will this affect users?
  End Users are not affected as only System Administrators have access to configure this functionality.

- **Enhancement: New Permission: Prevent Access to Merged Documents**
  Reference #: 210120.337.2575

  A new permission – Documents: Prevent Access to Merged Documents – has been added to the system which will prevent users from viewing or adding a merged document to any record in Contract Insight.

  How will this affect users?
  End Users with this permission assigned to their account by a System Admin will not be able to view or add a merged document on any record in the system.

- **Enhancement: Sort Quick Search results**
  Reference #: 210120.362.682

  The ability to sort Quick Search results has been added to Contract Insight. Each results grid can be sorted and filtered as other tables within the system.

  How will this affect users?
  End Users will be able to sort and filter Quick Search results.

- **Enhancement: Sub table add “None” option to hide Add and Bulk Add buttons**
  Reference #: 210120.439.2713

  User created subtables have been updated with a new option for configuring how users can add subtable data. In addition to One Off Only, Bulk Only, and All, System Administrators can now choose a ‘None’ option. This option will hide the subtable Add and Bulk Add buttons to prevent users from adding any new data to a subtable from the Record Details screens.

  How will this affect users?
  End Users are not affected as only System Administrators and Admins with permission can configure this setting.

- **Enhancement: Configuration setting for Copy Contract side menu item**
  Reference #: 210120.416.2541

  A configuration setting has been added to the system so System Administrators can set whether to enable use of the legacy Copy Contract functionality which would copy all record attachments or to use the Field Mapper functionality where users can select specific attachments.

  How will this affect users?
  End Users are not affected as only System Administrators can configure this setting.

- **Resolution: Duplicate Note after refreshing web browser screen**
  Reference #: 210120.445.2488

  After adding a Note to a record, users who clicked their web browser's refresh button noticed a duplicate Note was added. This has been updated so that a duplicate Note is no longer added after refreshing the browser page.

- **Resolution: Task status links for completed tasks still on grid if not set to left align**
  Reference #: 210120.362.2447

  After selecting a Task Status in the Task Grid on a record, the task status links were still present on the grid if the system was not configured to show Task Statuses as left aligned. This has been resolved so that the task status links are hidden once the Task is completed, regardless of alignment.

- **Resolution: Pop-up message appears when attempting to upload a file that is currently checked out**
  Reference #: 210120.416.2515

  Some users were receiving a pop-up error message when attempting to upload a file that had been checked out for viewing/editing. This pop-up error has been removed and users should only see an on-screen message noting that the file cannot be uploaded as a prior version is checked out.

- **Resolution: Subtable "Date Entered" system field displaying date only**
  Reference #: 210120.445.2517

  Subtable entries were showing the Date Entered as a date only. This has been updated to show as a date/time entry as configured in other areas of the system.

- **Resolution: Drop Down Filter Type on Ad-Hoc reports Filters/Conditions not behaving as expected**
  Reference #: 210120.445.2503

  When configuring an Ad-Hoc Report, the Drop Down Filter Type on the Filters & Conditions screen was not affecting the dropdown selection options. The functionality has been updated to show Drop Down values in the Conditions as set in the Drop Down Filter Type – list all available values if set to Picklist Filter and custom values (type-in) if set to Custom Filter.

- **Resolution: Multi-page grid of Decision Trees showing first page of results**
  Reference #: 210120.416.2523

  Some users unable to view past the first page of results for Decision Trees if there were multiple pages. Issue has been resolved so users can view each page in the grid.

- **Resolution: Specific fields used for Filters/Conditions on an Ad-Hoc report not filtering results as expected**
  Reference #: 210120.445.2524

  Using master reference data fields such as Contract Type Name, Status Name, and Department Name to filter an Ad-Hoc report were not returning any results. However, when using the corresponding ID (Contract Type ID, Status ID, etc.), results were returning as expected. The filters have been updated to return results as expected whether the name field or ID field is used for filtering.

- **Resolution: Vendor/Customer Workflow Tasks not creating with Time Elapsed option**
  Reference #: 210120.445.2529

  The “Allow time elapsed execution” option was not triggering Tasks as configured when the Workflow was applied for the Vendor/Customer table. This has been resolved so the Task(s) are executed as expected based on the Time Elapsed configuration.

- **Resolution: Cache Issue on Add/Details screens when fields are altered through field manager**
  Reference #: 210120.337.2531

  Using multiple tabs to edit field display names or field group names via the Field Manager on one tab then switching to another with a Record Add or Record Details screen and refreshing to view the changes was causing a caching issue. The issue has been resolved to clear the system’s cache when a field is updated or changed in the Field Manager.

- **Resolution: Unable to copy subtable entry with a Calculated Field**
  Reference #: 210120.416.2535

  Some users were receiving an error when attempting to copy a subtable entry that contained a calculated field. This has been resolved so that entries with a calculated field can be copied.

- **Resolution: Vendor Type filter on an Ad-Hoc Report Filters/Conditions configuration page listing Vendor Names**
  Reference #: 210120.445.2540

  When building an ad-hoc report using Contract Details as the primary table, users were receiving a list of Vendor Names when attempting to configure a filter using the Vendor Type field. This is now updated so users see the expected set of values for the filter.

- **Resolution: Unable to copy a Contract Record if all attachments are deselected**
  Reference #: 210120.416.2541

  Users were getting an error when attempting to copy a Contract Record after deselecting all attachments available for copying. The issue was resolved so that users can copy a Contract without copying any of the attachments.

- **Resolution: Unable to specify sort order for calculated fields**
  Reference #: 210120.337.2550

  Users with access were unable to specify the sort order for calculated fields while editing in the Field Manager. This has been resolved so that calculated fields show sort order as on other field types in the Field Manager.

- **Resolution: Cascading drop-down losing cascade configuration when edited**
  Reference #: 210120.337.2551

  Editing a drop-down field in the Field Manager that was used as part of a cascading field would cause the cascade configuration to disappear. These fields can now be edited without losing the cascade configuration.

- **Resolution: Workflow Visualizer cannot be viewed if Task's field update is a date calculation**
  Reference #: 210120.445.2559

  When a Workflow Task is configured with a calculation to update a date field, the Workflow Visualizer cannot be loaded from the side menu of the workflow. This has been updated so the Workflow Visualizer shows as expected when a calculated date field update is present.

- **Resolution: Price Cost Schedule Description field on a Contract Record is a decimal field**
  Reference #: 210120.416.2563

  The Description field on a Price Cost Schedule within a Contract Record was only allowing a decimal instead of text. The field has been reconfigured to ensure text can be entered, as expected.

- **Resolution: Task Details Screens Missing Separation of Permissions to Edit vs Permissions to Accept/Reject**
  Reference #: 210120.337.2569

  Users assigned to a Task directly, as an alternate contact, or via a Role/Group were unable to Complete or Reject if they did not have Edit Task permissions assigned to them. This has been updated so users assigned to a Task can Complete/Reject it without needing to have Edit Task permissions assigned.

- **Resolution: Fields cannot be deleted if used in conditions on deleted Workflow**
  Reference #: 210120.445.2571

  After deleting a workflow, conditions remained causing the related fields to still show as being associated to the workflow, which meant those fields could not be deleted. The workflow conditions are now removed automatically when a workflow is deleted.

- **Resolution: Reminders to Sign continue to be sent after signing process completed**
  Reference #: 210120.445.2607

  Reminders to Sign were still being sent to signers after all parties had signed or one party rejected. This has been resolved to stop sending reminders once signing is rejected or completed.

- **Resolution: Bulk Template rows removed after saving a modified template**
  Reference #: 210120.439.2624

  A few users were experiencing an issue when editing a Bulk Template in the Field Manager where rows of the template were deleted upon clicking Save. A check has been put in place to verify that the modified rows are inserted properly before deleting old rows of templates.

- **Resolution: Ad-Hoc Report results 'Export All' option does not export if assigned subtable does not have any fields assigned**
  Reference #: 210120.416.2621

  Results from Ad-Hoc reports with subtables that have no fields assigned could not be exported using the Export All option after running the report. This has been resolved so that the Export All option will export any available data.

- **Resolution: One-off Tasks auto-completing on Edit without changing status**
  Reference #: 210120.362.2626

  One-off Tasks were being marked as completed after users edited the Task but did not change the Status of the record and was due to enabling field updates by any Task Status triggered by a workflow. This has been resolved so that one-off Tasks are only marked as Closed if the status is set to "Task Complete" or "Rejected"

- **Resolution: Able to select Language but not Area for configuration of Language Resources**
  Reference #: 210120.445.2648

  Some users were experiencing an issue where, after selecting the Language for the Language Resources configuration, the Area selections were not populating. The Area should now be populating as expected after choosing a Language.

- **Resolution: File Category dropdown blank when configuring a Workflow Condition**
  Reference #: 210120.445.2679

  When creating a Workflow for the Contract Files table, users were unable to choose a File Category when setting up a condition. This has been resolved so that the File Category dropdown field is populating as expected when setting up a condition on a Workflow.

- **Resolution: Request notification email listing Requestor's name twice**
  Reference #: 210120.445.2700

  The Requestor's name was showing twice in Request notification emails. The notification was updated to only show the Requestor's name once.

- **Resolution: Calculated Fields missing Visibility and Conditions options**
  Reference #: 210120.439.2706

  When creating a Calculated Field, users were unable to set the field's Visibility and configure Show/Hide Conditions. These two configurations have been added to Calculated Fields.

- **Resolution: Field length too short to enable mapping of Request Notes field to Vendor Notes field**
  Reference #: 210120.416.2710

  While configuring field mapping between Request records and Vendor records, users were unable to map the Notes field from Request to Vendor due to the limit of characters for the Vendor Notes field. The Vendor Notes field has been updated to expand the number of allowable characters so the Request Notes can be mapped over.

- **Resolution: Duplicate Tasks Showing**
  Reference #: 210120.377.2659

  Users were noticing Tasks being duplicated when viewing My Tasks List, My Past Due Tasks, and the Ad-Hoc report: My Open Requests Tasks. This has been resolved so the Tasks are no longer duplicated and only displayed once.

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: Clicking "Complete" button multiple times on Signing process sends multiple emails and alerts**
  Reference #: 210120.416.2534

  Users who clicked on the "Complete" button more than once after signing a document noticed that multiple emails and alerts would be sent. This was resolved to only send the expected number of emails and alerts.

- **Resolution: Files attaching multiple times in DocuSign**
  Reference #: 210120.362.2614

  Clicking on the DocuSign dialog box multiple times was attaching the file(s) multiple times. This has been updated so that the dialog box button is disabled after clicking once to prevent the possibility of multiple clicks.

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: E-Sourcing Ratings and Scoring Subtable Export**
  Reference #: 210120.416.1378

  The Ratings and Scoring results on an E-Sourcing record can now be exported to an Excel file. This will enable users with access to download and compare the Ratings/Scores across all entries on the record.

  How will this affect users?
  End Users with access will be able to export Ratings and Scoring results to an Excel file.

- **Resolution: Add Price/Cost Item button missing from E-Sourcing Details page**
  Reference #: 210120.416.2678

  The Add Price/Cost Item button to add a single Pricing Line Item on the E-Sourcing Details page was missing from the subtable. The button is once again visible on the Pricing Line Items table.

- **Resolution: "New Request Record" From E-Sourcing Record unusable by Non-Admins**
  Reference #: 210120.337.2698

  Users who were not Admins in the system could not create a new Request Record from an E-Sourcing record. This has been resolved so that users with permission to add a Request Record can use the side menu link to create a new Request record from the E-Sourcing record they are viewing.

- **Resolution: Solicitation Notes not populating when used on Document Template**
  Reference #: 210120.416.2684

  When the Solicitation Notes table was added as a mergeable subtable on a Document Template, the merged document was not showing any of the notes text. The Solicitation Notes table now populates the appropriate data when used as part of a Document Template.

- **Resolution: Survey Question Bank not viewable past first page**
  Reference #: 210120.416.2672

  A Survey Question Bank with multiple pages would generate an error when users attempted to view past the first page. This has been fixed so that all pages in the Survey Question Bank can be accessed.

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: Self-Registration Wizard for the Vendor/Client Gateway**
  Reference #: 210120.439.808

  Self-registration for the Vendor/Client Gateway can now be configured as a wizard-based registration form. Configuring a self-registration wizard allows System Admins and Admins with permission to specify how the information should be organized for each Wizard created. When using a configured wizard, registrants will be presented with one or many tab-based Sections which are comprised of Section Groups. Each Section Group contains the fields the registrant needs to fill out to complete the registration process.

  How will this affect users?
  End users are not affected as only System Administrators and Admins with permission can configure a Self-Registration Wizard.

- **Enhancement: Extend Multi-Factor Authentication to Gateway Login**
  Reference #: 210120.439.2572

  The Multi-Factor Authentication (MFA) for the Vendor/Client Gateway self-registration has been extended to include existing users attempting to log in using their established username and password. If MFA for the Vendor/Client Gateway is enabled, users will be emailed a code after submitting their username/password for login. Once the correct code is entered, the user will be logged in to the Vendor/Client Gateway.

  How will this affect users?
  End Users of the core system are not affected. If configured, Vendors/Clients will need to provide an emailed MFA code when attempting to log in.

Aggregated Data Feed Services

Optional Add-On Data Feeds that provide your organization with the capability of pulling in feeds of data relating to risk, compliance, contract management, procurement management, etc. from CobbleStone's Data Aggregator Service. Currently this service is configured for data feeds from OFAC.

- **Enhancement: Reporting capability for OFAC results**
  Reference #: 210120.337.1863

  OFAC Compliance database views are now available for use when creating an Ad-Hoc report. This enables users with permission to create a report showing results from the OFAC searches performed by the system, if configured.

  How will this affect users?
  Users with permission can use these database views to create reports of OFAC results.