COBBLESTONE
SOFTWARE

CONTRACT INSIGHT
PATCH NOTES

Version 17.8.1 (rev 210226)

Friday February 26, 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)*
17.8.1 (Rev 210226)	Friday February 26, 2021	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: Task Cycle Time Management**
  Reference #: 210226.337.2602

  Task Cycle Time Management is a new feature that, once configured, enables users to report on a Task's *Days In Process* and *Working Days In Process* for Task Process Areas which have been created by System Administrators.

  These Task Process Areas can be set to roll on to a Task when a Workflow is triggered, or they can be added when creating a one-off Task. They can also be modified on the Task Details page, regardless of how the Task was added to the record.

  The three new fields – Task Process Area, Days In Process, and Working Days In Process – are all available for use on Ad-Hoc Reports, Report Designer Reports, and Graphical Reports/Dashboards.

  How will this affect users?
  End users with access to create reports will be able to create Task reports using Task Process Area, Days In Process, and Working Days In Process fields.

- **Enhancement: Enable My Calendar export to support iCalendar (.ics) format**
  Reference #: 210226.416.2750

  Contract Insight's My Calendar can now be exported to iCalendar format (.ics) in addition to the existing Outlook vCalendar (.vcs) format.

  How will this affect users?
  Users with calendar programs that use .ics imports can now export their My Calendar into the appropriate format.

- **Enhancement: Show Merged Document Templates Table**
  Reference #: 210226.445.2738

  A new configuration setting is available for System Administrators to show or hide the Merged Document Templates subtable across all record Details screens. When configured, the subtable is only hidden and existing merged templates or those added through a workflow will still be on the record when the configuration setting is reset to show the Merged Document Templates subtable. Note that if documents are merged onto a record and automatically attached, those attachments will still show in the Files/Attachments area.

  How will this affect users?
  End users will no longer see the Merged Document Templates subtable if a System Administrator has set the configuration to hide the subtable.

- **Enhancement: Quick Search - Option to hide Top Page from Files and/or Source columns**
  Reference #: 210226.362.2802 and 210226.362.2825

  System Administrators are now able to hide or show the Top Page from Files column and/or the Source column from the Quick Search results page. The configuration settings can be found in the General System configuration settings and can be set to False to show the field(s) (default setting) or True to hide the field(s).

  How will this affect users?
  End users will not see the column(s) in Quick Search if hidden by a System Administrator.

- **Enhancement: Updated page for one-off Emailing of a Record**
  Reference #: 210226.445.2585

  When choosing Email from the side menu of a record, users will notice an updated user interface. They can now begin typing in the To, CC, or BCC fields to bring up a list of names/emails to choose from. For example, typing in "CobbleStone" would show everyone the email could be sent to who has "CobbleStone" in their email address. Note that contacts for external companies will only show on the list if they are associated with that specific record. Users are still able to enter a one-off email address as well.

  Existing Email Templates are still available, or users can create a new Email Template (View All Templates) or create their own message. They can also choose to include any attachments from the record.

  Once the email is sent, it will still be listed in the Notes section of the record and will also be entered into the History log.

  How will this affect users?
  End Users will be presented with an easier to use interface for sending an one-off email from a record.

- **Resolution: Unable to save Newsletter when date format is changed**
  Reference #: 210226.445.2759

  Users who had changed their date format from dd/mm/yyyy were unable to save after creating a newsletter. This has been resolved so that the newsletter can be saved if the user's date format was changed.

- **Resolution: Bulk Update Tool cannot be filtered on Employee ID**
  Reference #: 210226.445.2773

  When performing a Bulk Update, users were unable to type in an ID when attempting to filter by Employee ID. Users are now able to type in the Employee ID as expected.

- **Resolution: Users without permission could add a new Company/Vendor on the Contract's Additional Companies page**
  Reference #: 210226.445.2778

  A new Company/Vendor could be added to the system by users without permission on a Contract record's Additional Companies page. This has been fixed so users without permission can no longer add a new Company/Vendor on the Additional Companies page.

- **Resolution: Report not showing header for the View Company link column**
  Reference #: 210226.445.2787

  When running an Ad-Hoc report, the View Company link column did not have a header and, when exported, would show as Column1. This has been updated so the column is titled 'View Company' when viewing the report and on the exported file.

- **Resolution: Unable to access Find/Search Contracts page**
  Reference #: 210226.445.2805

  Users with their Regional Setting set to English – South Africa (en-ZA) were seeing an Application Error Issue page when attempting to go to Find/Search Contracts. This has been resolved so the proper Find/Search Contracts page is shown as expected.

- **Resolution: Data Import Manager unable to process import with 2 checkbox columns**
  Reference #: 210226.416.2788

  Data Import templates containing two (2) checkbox columns were unable to be processed and would give the user an error. This has been fixed so that the templates import as expected.

- **Resolution: Typo on Manage Fields page**
  Reference #: 210226.445.2832

  After selecting a table on the Manage Fields page, the Tip that appears was worded incorrectly. The wording has been updated.

- **Resolution: Workflow Task not saving if Note has large amount of text with HTML**
  Reference #: 210226.445.2837

  When attempting to paste a large amount of text with background HTML into the Task Note field on a Workflow, users were unable to save the updated Task. This has been resolved to allow saving the Workflow Task Note.

- **Resolution: Record Types Manager sorting by ForArea instead of TypeName**
  Reference #: 210226.445.2850

  Users noted that the Record Types Manager was updated to sort by ForArea instead of the expected TypeName. The list has been updated to sort by TypeName again.

- **Resolution: Hidden Fields Showing on New Request**
  Reference #: 210226.445.2870

  While editing a Field Group, users were seeing fields that should have been hidden based on Conditional Fields settings. This has been resolved so the fields remain hidden and only shown when the configured conditions are met.

- **Resolution: No audit log when copying an Ad-Hoc Report function**
  Reference #: 210226.416.2878

  An entry stating an Ad-Hoc Report was copied was not being added to the History log after performing a Quick Copy. This has been updated so the history log on the original report and the copy version have an entry noting when it was copied, who copied it, as well as the Report ID for both the original and copied ad-hoc report.

- **Resolution: Additional issues related to copying subtable records**
  Reference #: 210226.416.2882

  When configured in the Field Mapper, clicking Copy on a subtable record's side menu was showing the subtable currently being viewed instead of the mapped subtable(s). This has been fixed so the pop-up window shows options to duplicate the record in the same subtable or to copy to a mapped subtable.

- **Resolution: File category not displaying for Attachments on Requests**
  Reference #: 210226.445.2884

  Users had noticed the chosen File Category is not appearing or is moving to a different attachment when adding an attachment in Requests. This has been resolved so the chosen File Category shows as expected.

- **Resolution: Quick Search timing out**
  Reference #: 210226.377.2885

  Attempting to perform a Quick Search with thousands of pages of attachments and using the new "Top Page from Files" column was causing the search to time out. This has been updated so the Quick Search runs as expected.

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: Reduced number of clicks to download a generated Document Template**
  Reference #: 210226.362.2742

  When adding/managing the Document Authoring Templates on a Workflow Task, users will now see a new yes/no option called "Attach the files". Setting it to "Yes" will automatically add the generated merged template to the Files/Attachments area of a record when the Task is triggered.

  How will this affect users?
  If configured, End users would be able to view the generated document from the Files/Attachments area of a record.

- **Enhancement: Ability to Enable/Disable IntelliSign in the Document Toolbox**
  Reference #: 210226.445.2792

  This new enhancement enables System Administrators to enable or disable the ability for users to send documents for signature using IntelliSign from the Document Toolbox on the Files/Attachments area of a record. By default, the Document Authoring configuration setting for Enable IntelliSign configuration is set to true.

  How will this affect users?
  End users are not affected as only System Administrators have the ability to change this configuration setting.

Enhancement: eApproval and eSignature Enhancements
Reference #: 210226.337.2516

Several enhancements have been made to the eApproval and eSignature processes:

- Any documents added as a Reference File to a Document Template will be kept in their original format as opposed to converting to a PDF.
- Users managing an Approval Process or Signature Process can now replace participants that have not already approved/signed.
  - When a Process group is currently Active, a participant that has not already approved or signed can be replaced and a reason must be provided. In this instance, the original participant will be sent an email letting them know they were replaced along with the reason. The new participant will receive the standard invitation to approve or sign their document(s).
  - If the Process Group is still Pending, a participant can be replaced along with a reason for the replacement. In this instance, an email is not sent to the original participant and, when the Process Group becomes Active, the standard invitation to approve or sign will be sent to the updated participant.
- And, finally, on the Negotiation portal, users designated as the Reply-To employee(s) are now able to add Comments to Approval and Signature processes, even if they are not the participants.

How will this affect users?
End Users with access will be able to replace an Approver or Signer and will be able to add Comments to an Approval or Signature process if they are the Reply-To employee.

Resolution: eSignatures not processing with multiple Signature groups
Reference #: 210226.337.2835

Users were experiencing an issue when an eSignature process contained more than one Signature group. This has been resolved so the eSignatures process as expected with multiple Signature groups.

Resolution: Duplicate file extension when automatically attaching a Merged Document Package
Reference #: 210226.337.2782

Merged Document Packages automatically attached to a Request, PO, or Sourcing record were showing the file extension duplicated when the file was added to the Files/Attachments area on the record. This has been updated so the file shows one file extension.

Module: Purchase Order Management

Optional Add-On Module for the creation, management, tracking and monitoring of the lifecycle of Purchase Orders as they relate to Contracts.

- **Resolution:** PO Links on Requests
  Reference #: 210226.377.2834

  The PO Links subtable on Request records were pulling the PO record ID that matched the Request record ID, even if the PO was not linked to that Request. This has been resolved so the correct PO Links only show on the related Request.

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:** Single Sign On - Redirect to AppInvalid
  Reference #: 210226.362.2806

  When SSO is set up without ever logging into the Core system using a standard username and password, users were stuck in a redirect loop. This has been resolved so that users are directed to the appropriate page.

- **Resolution:** Single Sign On - ADFS Legacy Setting
  Reference #: 210226.362.2852

  SSO ADFS Legacy setting was preventing users from logging in using SSO. This has been fixed so SSO works as expected with the legacy ADFS setting.

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 & AdobeSign.

- **Resolution:** DocuSign Error on Vendor/Employee Records
  Reference #: 210226.445.2833

  Users were experiencing an error when attempting to use DocuSign on Vendor and Employee records. This has been fixed so Vendor and Employee Records can go through the DocuSign process as expected.

Connector: SMS/Text Integrations

Optional Add-On Connector that provides your organization with the capability of sending SMS notifications for Task Alerts and Multi-Factor Authentication Verification Codes for both the Core System and Vendor/Client Gateway logins. Currently this connector is configured for integrations with Twilio.

- **Enhancement: Multi-Factor Authentication SMS/Text Enhancement (Core and VCG)**
  Reference #: 210226.416.2692

  SMS Messaging can now be licensed through CobbleStone Software as an optional add-on component. CobbleStone's built-in integration with Twilio enables clients to set up SMS notifications for Task Alerts and Multi-Factor Authentication (MFA) Verification Codes for both the Core System and Vendor/Client Gateway logins.

  How will this affect users?
  When licensed and configured, end users will receive text messages with a login verification code and/or text messages for Task notifications.

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.

- **Resolution:** OFAC Logging Correction
  Reference #: 210226.362.2762

  Logging for OFAC web methods was logging the OFAC request where the OFAC response should have been logged. This has been updated to log the information in the correct area.