COBBLESTONE
SOFTWARE

CONTRACT INSIGHT

Patch Notes

Version 17.9.1 (Rev 210618)

Friday June 18, 2021

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Hotfix Notes Overview

CobbleStone Software's Contract Insight application hotfix notes are documentation of bug fixes and security issues that have been resolved. There are no new features or enhancements included in a hotfix.

Hotfix Version Information

The high-level information regarding this version is detailed below:

Version Number	Client Release Date	Type *(from prior release)*
17.9.1 (Rev 210618)	Friday June 18, 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.

- **Enhancement:** Bulk Assign Ad-hoc and Report Designer reports on Employee Details page
  Reference #: 210618.416.2948

  System Administrators now have the ability to bulk-assign both Ad-hoc and Report Designer reports to an employee directly on the Employee Details page.

  How will this affect users?
  End users are not affected by this enhancement as only System Administrations have the ability to perform this action.

- **Enhancement:** Updated VISDOM Robot Graphic
  Reference #: 210618.489.3248

  The VISDOM Robot has been updated throughout the system with a new look.

- **Enhancement:** Locking headers and columns on Bulk Add templates
  Reference #: 210618.439.2819

  Two updates have been made for the Bulk Add templates.

  First, the column headers are now "frozen" so that the headers are still visible on the screen when users add a large number of entries to the sub table.

  Second, adding/editing fields on the Bulk Add template can be restricted by use of the Field Restrictions option when configuring a Security Group.

  How will this affect users?
  End Users will be able to see column headers at all times while adding entries to a subtable using a Bulk Add template. They may also be prevented from adding to specific fields on the Bulk Add template depending on how their user account is configured by a System Administrator.

- **Enhancement:** Application Configuration setting for exporting Ad-Hoc reports that use sub-tables
  Reference #: 210618.416.460

  An application configuration setting has been added to give greater flexibility over how Ad-hoc reports with sub-tables are exported. The setting gives System Administrators the ability to allow either exporting all the data to one sheet (current functionality) or having sub-tables details split into separate sheets. The change can be made by going to Config Settings, selecting General System, and updating the *Use Ad-Hoc Report Legacy Export All* setting.

How will this affect users?
End users are not affected by this enhancement as only System Administrations have the ability to perform this action.

- **Enhancement:** Map initial Vendor Contact fields using the Field Mapper
Reference #: 210618.416.3247

The Field Mapper has been updated to allow mapping fields from the Vendor Add screen to the initial Vendor Contact that is automatically generated. This gives System Administrators more control over what information is used for the initial Vendor Contact when adding a new Vendor/Company to the system.

How will this affect users?
End users are not affected by this enhancement as only System Administrations have the ability to perform this action.

- **Enhancement:** Ability to manage how fields can be edited on a Record
Reference #: 210618.439.3218

Two settings have been added to the Field Manager which determine how users are able to edit fields on a Record.

After selecting any table in the Field Manager, System Administrators will be presented with two new options: Allow Single Field Edit and Allow Group Field Edit. Out of the box, both options are checked to retain the current functionality. Only checking *Allow Single Field Edit* will allow users to edit a record field-by-field. Alternately, only checking *Allow Group Field Edit* will allow users to edit a record by the Field Group. If an edit option is unavailable, the appropriate pencil icon(s) will be grayed out. Note that users may need to log out then log back in to see the configured changes.

How will this affect users?
End Users will be presented with the edit option(s) chosen by their System Administrator.

- **Resolution:** Widened the 'File Category' field in Files/Attachments area
Reference #: 210618.445.3003

Users were unable to see the full name of the File Category field in the Files/Attachments area of a Record. The field has been updated to be wider so more of the File Category name can be viewed.

- **Resolution:** Show 'Mark as Unique' column on Field Manager grid
Reference #: 210618.445.3136

The Field Manager grid was not showing which fields, if any, are set to 'Mark as Unique' after selecting the table to manage. This has been updated to show the 'Mark as Unique' column on the Field Manager grid.

- **Resolution:** Some clauses added during Online Editing show as highlighted when the document is downloaded
  Reference #: 210618.439.3201

  Clauses with line breaks were showing as highlighted in the downloaded document if added from the Clause Library with the Add Clause button while using the Online Editor. This has been resolved by altering the way clauses are added to the document via the Online Editor.

- **Resolution:** Excel export from some pages shows a warning message when opening the downloaded file
  Reference #: 210618.337.3219

  Users noted that there was an error message presented when opening an Excel file exported from the Department List, Request List search screen, and pages utilizing the List Manager. The issue causing the warning has ben resolved so the exported Excel files open as expected.

- **Resolution:** Saving a field group without making changes adding entry to History page
  Reference #: 210618.509.3125

  When viewing the history of a record's Details screen, entries had been added when a user clicked the pencil icon to edit the field/field group then saved without making any changes. This has been resolved so the history will only show an entry if a field's value has been updated.

- **Resolution:** Extra horizontal scrollbar appearing at the bottom of certain result-list pages
  Reference #: 210618.416.3111

  Certain result-list pages were showing horizontal scrollbars for both the grid of results as well as one for the browser window, which was scrolling to an empty space on the browser. The scrollbar for the browser window has been removed.

- **Resolution:** Unifying style of Notes between Contracts and Requests
  Reference #: 210618.416.3106

  The Notes section of Requests and Contracts looked different and had inconsistent wording. The Notes section on Request has been updated to mirror that of Contract records.

- **Resolution:** Survey questions out of order when reviewing responses
  Reference #: 210618.416.3143

  When viewing responses to a Survey, users noted that the survey questions were not in the same order as the original survey. This has been resolved so the questions show in the same order when creating a new survey, taking a survey, and reviewing the results of the survey.

- **Resolution:** Unable to bulk-add Employees to a Role/Group
  Reference #: 210618.445.3144

  Users with access were unable to add more than one Employee at a time to a Role/Group. This has been fixed so that Employees can be added in bulk as expected.

- **Resolution:** Edit Document button enabled for other file types
  Reference #: 210618.439.3163

  The Edit Document button on the Files/Attachments area was showing as enabled for file types other than the intended .docx, .doc, or .pdf. This has been updated so that the Edit Document button is only enabled for the intended file types.

- **Resolution:** Deleted clauses available in Online Document Editor
  Reference #: 210618.439.3170

  After deleting a clause from the Clause Library, it was still available to be added to a document using the Online Document Editor. This has been resolved deleted clauses can no longer be chosen.

- **Resolution:** Add In-line unavailable on Add Vendor Contact
  Reference #: 210618.439.3172

  When adding a Vendor Contact, the option to add data in-line for certain fields was unavailable on the Vendor Contact Add screen. This has been updated so users with access can now add data in-line as expected.

- **Resolution:** Survey "# Completed" column showing count of started surveys
  Reference #: 210618.416.3199

  The # Completed column in the Survey grid on a Details page is showing the count of surveys that have at least 1 question answered. This has been resolved to show the number of completed surveys successfully submitted, as expected.

- **Resolution:** Online Editing document checked-out if browser closed before save or cancel
  Reference #: 210618.439.3207

  When a browser closed prior to clicking Save or Cancel while using the Online Editor, the specific document was still showing as checked out to the user. However, when the user returned, they could not re-open the document as the Online Editor and Document Toolbox buttons were grayed out. This has been resolved so that when the user listed as having the filed checked-out returns, they can access the checked-out document and Save or Cancel to check it back in.

  A configuration setting has also been added to allow for Check-In/Check-Out for Online Editing. By default, this is set to True which does not change any current functionality. Setting to False will check all files back in and, from that point forward, Online Editing will not check-out any files.

- **Resolution:** Confirmation page after changing password
  Reference #: 210618.445.3008

  After successfully changing a password, users were still seeing the fields for entering a new password which was causing confusion on whether the password was actually changed. This has been updated to only show the confirmation message when the password change has been successful.

- **Resolution:** Hidden conditional field required on Edit
  Reference #: 210618.439.3224

  Users were unable to save changes when editing a Field Group that contained a hidden conditional field which was required when shown. This has been updated so that the Field Group does not request data for the required conditional field if it is hidden on Save.

- **Resolution:** Online Edit button available for Read Only users
  Reference #: 210618.416.3239

  Resolved an issue where the Online Edit button in the Files/Attachments area of a record was enabled for Read Only users. This has been fixed so the Online Edit button is grayed out if the user has Read Only permissions.

- **Resolution:** Default data not appearing on records for certain field types
  Reference #: 210618.509.3246

  Default data set when configuring a field was not appearing on Add screens for certain field types. This has been resolved so that all field types with default data show the configured defaults.

- **Resolution:** View Permissions buttons checking out of the box permissions
  Reference #: 210618.416.3249

  The two *View Employee Permissions* buttons recently added were only taking out of the box permissions into account and not user created permissions. This has been updated so user created permissions are accounted for in addition to out of the box permissions.

- **Resolution:** First line of Data Import not processing
  Reference #: 210618.416.3251

  When using the Data Import Manager, the first line of the file was not processing on import. This has been resolved so all lines import as expected.

- **Resolution:** Details screen load time
  Reference #: 210618.439.3261

  Under certain circumstances, some users were experiencing extended load times for a record's Details screen. Improvements were made to streamline the processing of record details screens to account for these scenarios/circumstances.

- **Resolution:** User created permissions not displaying Add button for certain out of the box Contract sub tables
  Reference #: 210618.337.3264

  User created permissions for the following out of the box Contract subtables were only working if the user also had a *Contracts: Edit* permission assigned as well: Checklists/Milestones, Budget/Funding Line Items, and Price/Cost Line Items. This has been resolved so the user created permissions work as expected for these 3 tables.

- **Resolution:** Users unable to click 'Back' on the Document Toolbox
  Reference #: 210618.509.3265

  Users would receive an Application Report Error when click the 'Back' button or link within the Document Toolbox on a Record's Files/Attachments section. The issue has been resolved so the 'Back' button or link returns the user to the main Document Toolbox page.

- **Resolution:** Unable to save a new Vendor/Company record under specific conditions
  Reference #: 210618.439.3266

  When required fields on a Vendor/Company Add screen were skipped **and** an entry was added into a sub table on the Add screen, the "Saving…" button did not revert to "Save & Continue" once the missing required fields were noted. This has been fixed to work as expected so the record can attempt saving again after the required data is provided.

- **Resolution:** User defined sub tables in order of creation
  Reference #: 210618.337.3267

  User defined sub tables on a record were showing in the order they were created instead of in alphanumeric order. This has been updated to show the subtables in the proper order when created as well as when the sub table name is updated.

- **Resolution:** Automatic merging of Document Template onto a record only processing when Parent record is accessed
  Reference #: 210618.362.3268

  Queued Document Authoring Template workflows were only being processed if the Parent record was accessed and not when using the Scheduler Manager. This has been resolved so that the Document Authoring Template can be trigged using the Scheduler Manager as expected without the need to interact with the Parent record.

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:** Enable/Disable Preview on e-Approval Gateway
  Reference #: 210618.337.3219

  A configuration setting has been added to enable or disable the Preview button for documents during the e-Approval process. This configuration is defaulted to be Enabled so the Preview button still shows.

  How will this affect users?
  If disabled, users going through the e-Approval process will not see the Preview button and will need to download the file(s) to view.

- **Resolution:** Any file type can be uploaded as a new Version for Document Collaboration and E-Approval
  Reference #: 210618.337.3219

  Uploading a new file version was not limited to the same file type as the original version for Document Templates, Merged Packages, and E-Approval processes. This has been updated so any new versions uploaded for these areas need to be the same file type as the original version.

- **Resolution:** List of eApprovers not searchable
  Reference #: 210618.416.3202

  The list of participants for the eApprover process could not be filtered as expected. The dropdown is now a filterable field.

- **Resolution:** eSignatures on document with both portrait and landscape pages
  Reference #: 210618.486.2173

  Documents returned from the eSignature process that had both portrait and landscape-oriented pages in the same document were only showing the signature added to the portrait-oriented page. This has been resolved so that signatures placed on both portrait and landscape pages are shown.

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:** Copy only Awarded Vendor documents when creating a record from a Solicitation
  Reference #: 210618.416.2849

  The Field Mapper has been updated with an option to only copy the Awarded Vendor's documentation when creating a record from a Solicitation. Depending on the configuration, selecting a mapped option under "Create From Sourcing" on the Solicitation record will either copy all files from the Awarded Vendor or allow users to choose which files to copy over from the Awarded Vendor prior from creating the new record.

  How will this affect users?
  End Users will be presented with the configured option (if any) for copying attachments.

- **Enhancement:** Ability to show/hide the Questions & Answers sub table on an eSourcing record in the Core system and the Vendor/Client Gateway
  Reference #: 210618.416.3070

  An application configuration setting has been added to show or hide the Questions & Answers table on an eSourcing record in both the Core system and on Vendor/Client Gateway. The *Allow Q&A Section on Solicitation Records* can be found in the Config Settings under Solicitations.

  How will this affect users?
  End users are not affected by this enhancement as only System Administrations have the ability to perform this action.

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:** Link to deleted PO shows on linked records
  Reference #: 210618.416.3173

  The link to a Purchase Order was showing as blank entries on a linked record after the PO was deleted. This has been resolved to remove the entry from the linked record once the Purchase Order has been deleted.

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.

- **Resolution:** Solicitation record still jumping on Vendor/Client Gateway
  Reference #: 210618.416.3116

  Some users were still experiencing Solicitations on the Vendor/Client Collaboration jumping while scrolling through the page. This has been updated so the page no longer unexpectedly moves while scrolling.

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, and DocJuris.

- **Enhancement:** DocuSign configuration page update
  Reference #: 210618.362.3252

  Paging has been added to the DocuSign configuration page. This will enable faster loading time for users with large DocuSign user lists.

  How will this affect users?
  End users are not affected by this enhancement as only System Administrations have the ability to perform this action.

- **Resolution:** External E-Sign unable to use NULL Title fields for Subject
  Reference #: 210618.362.3162

  The default Subject of the Envelope/Agreement for AdobeSign and DocuSign integrations uses the Record's title. When a Record title field was missing, the External E-Sign pages did not handle NULL values in the title field correctly. This has been resolved so the Subject of the Envelope/Agreement will show an empty title.