CobbleStone Software - Release Notes

Contract Insight Version 22.5.0 Rev 250624

Table of Contents

Release Notes > Update 22.5.0 Rev 2506274

Update Overview-Version 22.5.0 (Rev 250624)

Release Version Information

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

Release Version Number	Client Release Date	Release Type ***(from prior release)***
22.5.0 (Rev 250624)	24 June 2025	Update

Click here to download a PDF of the Release Notes

For CobbleStone Software version 22.5.0, New Feature(s), Enhancement(s), and/or Resolution(s) were added to the following areas:

- Core System: Contract Insight
- Module: Document Collaboration & E-Signature
- Module: E-Sourcing/Procurement Management
- Module: Vendor/Client Collaboration Gateway
- Connector: External E-Sign Integrations
- Aggregated Data Feed Services
- VISDOM+

Update 22.5.0 - Core System: Contract Insight

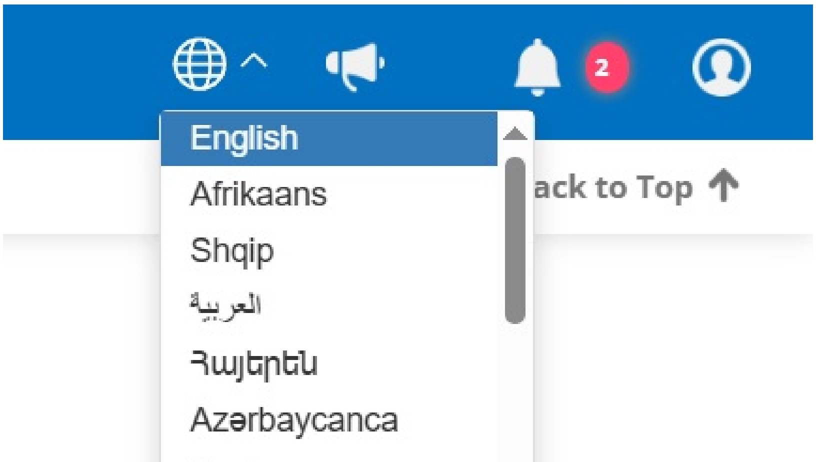
The Core System provides Contract Insight's core components and functionality for full lifecycle management of your organization's contracts and committals.

CORE SYSTEM
NEW FEATURES

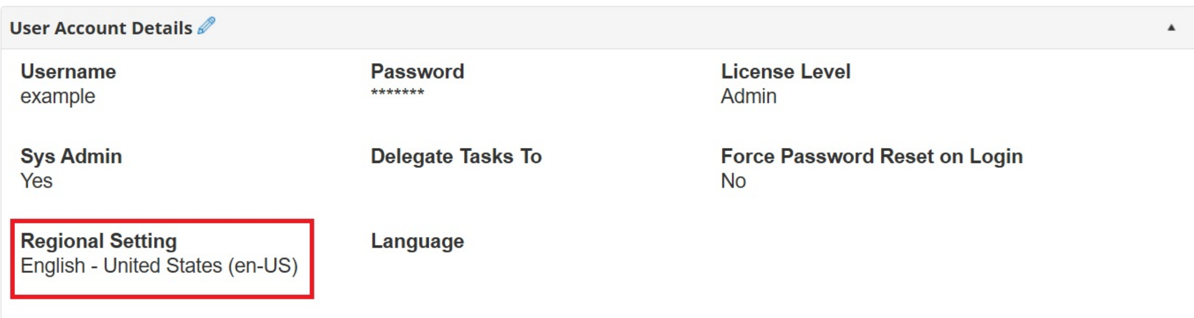
NEW FEATURE: VISDOM In App Translation

Reference #: 250624.1222.8548

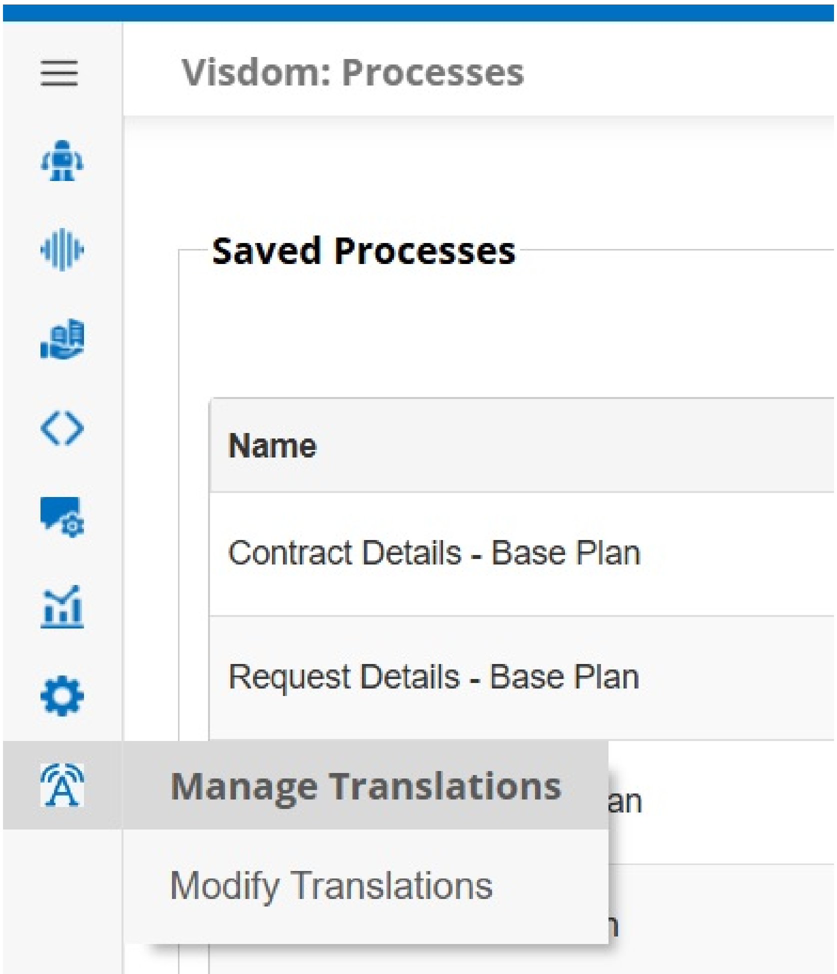
Contract Insight Can now leverage VISDOM as a Service to translate the static text on the page in the Core System, the Vendor Client Gateway, and the External E-Sign Portal. The language can be changed for the session via the new Globe Icon in the Header.



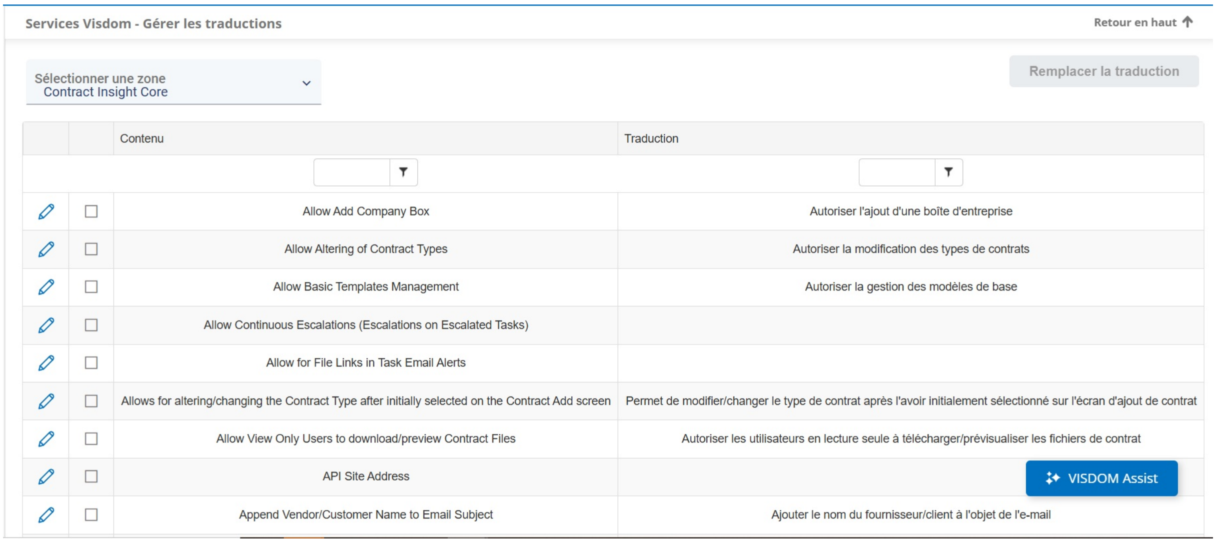
Language can also be changed permanently via the Regional Settings for the Employee or Company Contact.



To update inaccurate translations, users with access can navigate to the VISDOM Configuration page in the Core system (Application Menu -> Manage/Setup-> VISDOM Configuration). In the side menu, the last menu will have a Manage Translations option.



Once on the Manage Translations page, a dropdown is available to choose from Core, Vendor Client Gateway, or E-Sign portal. After selecting, the page will show all translations for the user's Regional Settings/dropdown language for the selected site. Clicking the pencil icon allows the the admin to edit the translation. Ensure to click the checkbox to indicate overriding the translation with the updated text.



Contenu	Traduction
Allow Add Company Box	Autoriser l'ajout d'une boîte d'entreprise
Allow Altering of Contract Types	Autoriser la modification des types de contrats
Allow Basic Templates Management	Autoriser la gestion des modèles de base
Allow Continuous Escalations (Escalations on Escalated Tasks)	
Allow for File Links in Task Email Alerts	
Allows for altering/changing the Contract Type after initially selected on the Contract Add screen	Permet de modifier/changer le type de contrat après l'avoir initialement sélectionné sur l'écran d'ajout de contrat
Allow View Only Users to download/preview Contract Files	Autoriser les utilisateurs en lecture seule à télécharger/prévisualiser les fichiers de contrat
API Site Address	
Append Vendor/Customer Name to Email Subject	Ajouter le nom du fournisseur/client à l'objet de l'e-mail

Clicking on the override translation button opens a popup where it'll ask the user which language does it want the translation to be stored in. A language must have already been used in order to appear in the override translations dropdown.

> **Note**
>
> For out-of-the-box translation services: All translations are performed using machine-based translation services and are provided "as is." Translated text may not be an exact translation or representative of natural written or spoken language. No warranty of any kind, either expressed or implied, is made as to the accuracy, reliability, or correctness of any translations.

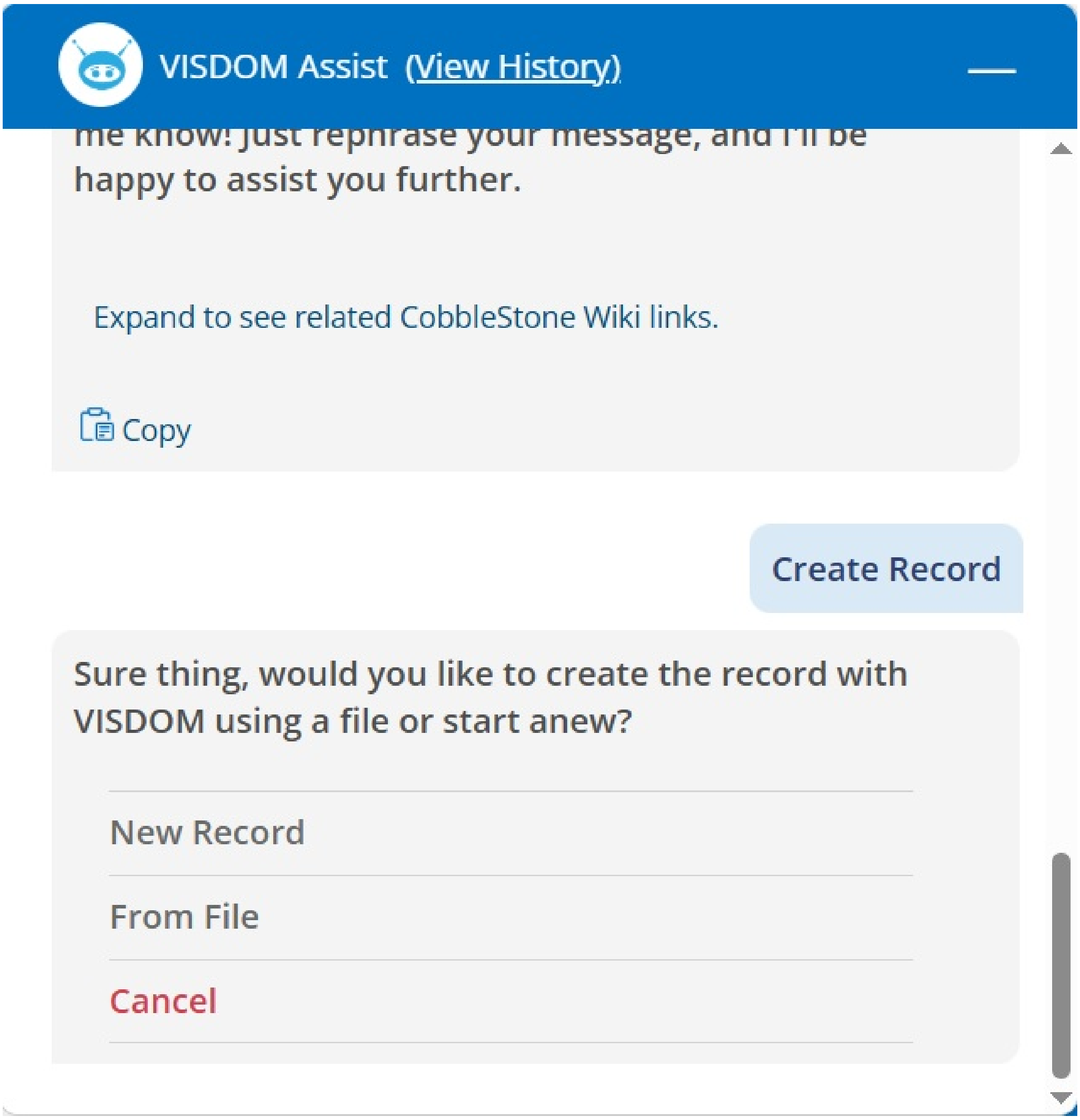
How will this affect users?

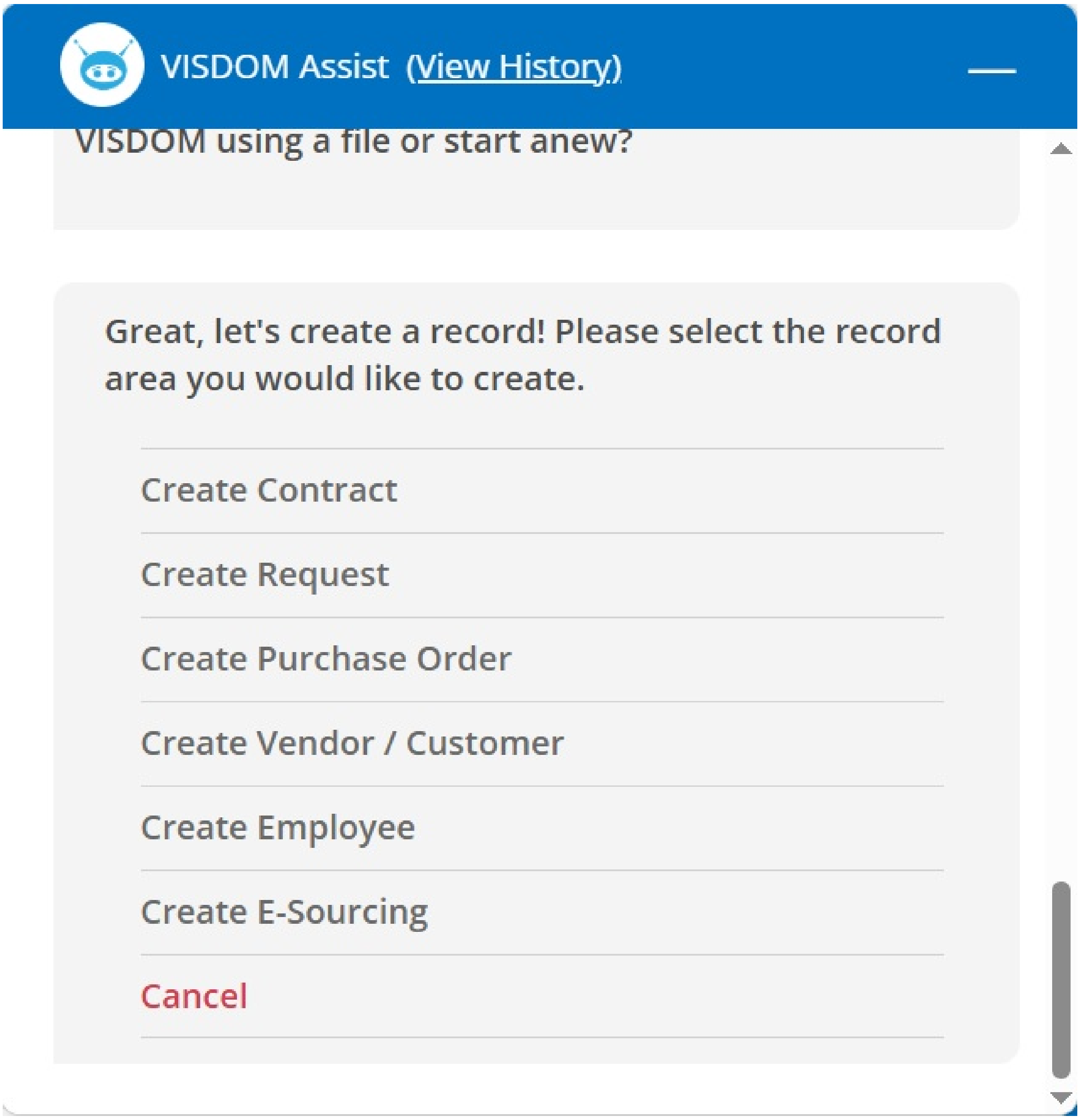
Users will be able to translate text into their desired language.

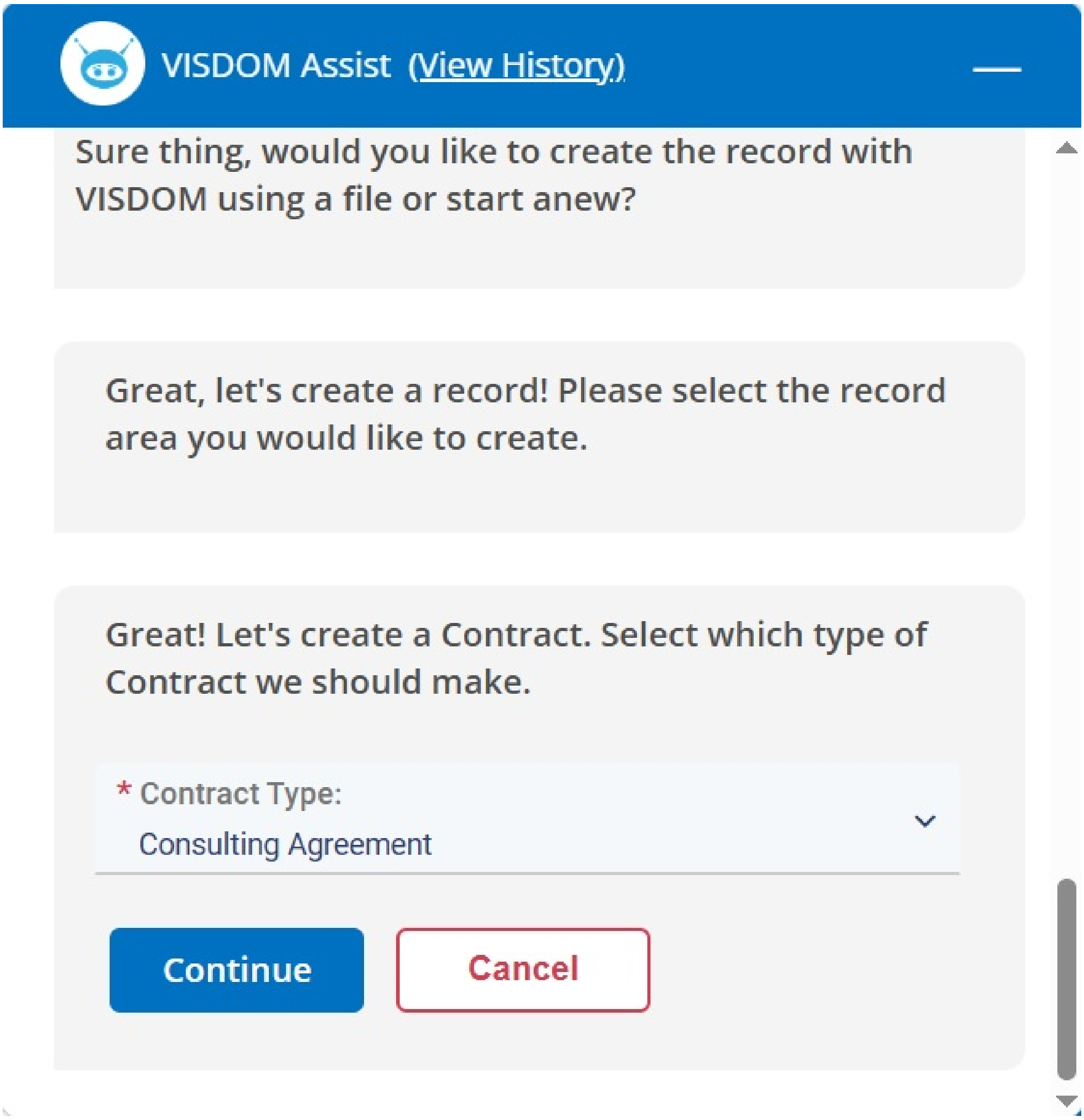
NEW FEATURE: VISDOM Assist Chatbot: Create Records

Reference #: 2506240.1222.4086

We have added the ability to initiate record creation using the VISDOM Assist Chatbot. To start, users can click the VISDOM Assist button on their screens and enter a phrase such as "Create Record" or "Create Contract" and VISDOM Assist will ask if you would like to start a new record or create from a file. Selecting New Record will allow the user to utilize the standard Add Screen for creating a new record within Contract Insight. Selecting the from file option allows them to utilize VISDOM+ or VISDOM Basic (depending on the license of their system) to create a new record.


VISDOM Assist (View History)
happy to assist you further.
Expand to see related CobbleStone Wiki links.
Copy
Create Record
Sure thing, would you like to create the record with VISDOM using a file or start anew?
New Record
From File
Cancel


VISDOM Assist (View History)
VISDOM using a file or start anew?
Great, let's create a record! Please select the record area you would like to create.
Create Contract
Create Request
Create Purchase Order
Create Vendor / Customer
Create Employee
Create E-Sourcing
Cancel



Responses to the default VISDOM Basic Prompts have also been improved as part of this update.

<u>How will this affect users?</u>

Users have another quick option for adding records without having to navigate through the menus.

CORE SYSTEM ENHANCEMENTS

ENHANCEMENT: Document Template Deletion Message

Reference #: 250624.1157.1355

The following text has been add to the Document Template deletion message to ensure the user understands the scope of the deletion: "Deleting this template will not remove it from previous records or delete attached files"

How will this affect users?

Adds clarity for users when deleting templates.

ENHANCEMENT: Add comments to PDFs in Online Editor

Reference #: 250624.345.12713

The Online Document Editor has been updated to allow comments to be added to PDF files. The Ability to add Comments to PDFs can be found when selecting the Edit Document option and select the Cobblestone Ribbon > View Comments > then you will see the option to add a comment to the PDF file.

How will this affect users?

Users will be able to leverage comments on PDF files.

ENHANCEMENT: Bulk Deleting existing setup data

Reference #: 250624.1245.8382

System Administrators have the ability to permanently bulk delete Master Reference Data list. The Task Status list will retain it's out of the box statuses (Open, Rejected, & Task Complete) regardless of Bulk Deletion.

CORE SYSTEM RESOLUTIONS

RESOLUTION: Auto-complete Tasks without notification sending notifications

Reference #: 250624.1092.9914

Clients had noticed they were receiving notifications from tasks that had been configured to Auto-Complete without notification. A fix was applied and tasks that should not send notifications are not sending notifications.

RESOLUTION: VISDOM Configuration - When selecting the SoundEx > Levenshtein algorithm, it switches to Jaro Winkler

Reference #: 250624.1278.14136

When editing VISDOM configuration, some users had noticed that the SoundEx > Levenshtein algorithm was saving as Jaro Winkler. A fix was applied and the SoundEx > Levenshtein algorithm should save correctly.

RESOLUTION: Updating File/Attachment information was not setting Date Updated on Record

Reference #: 250624.337.12856

Users noted that when a file was updated on records other than Contract, the Date Updated on the parent record did not changed. This has been extended to the other record areas of the system.

RESOLUTION: Users unable to download a file from Survey results

Reference #: 250624.365.12810

When reviewing the results on the Core system for a Survey that was completed on the Gateway using an Upload File question off of a Company record the download button was causing an error. This has been resolved so you can download files off of a completed Survey.

RESOLUTION: History not included when email chain forwarded to Contract Insight

Reference #: 250624.1259.10522

An issue was found where forward emails sent to records only contained the text from the most recent section of the thread as opposed to all of the past text. This has been resolved and now all forward email contain all expected text.

RESOLUTION: Unable to edit email address when re-sending an email from a record

Reference #: 250624.349.10411

A concern was found with the users inability to edit the To, CC, and BCC fields when re-sending an email from a record. This has been resolved and users now have the expected capabilities.

RESOLUTION: Bulk Add Changes Not Updating Without Logout

Reference #: 250624.317.10113

When changing the Add Options for a subtable it was forcing the user to log out and log back in to see the changes. Now when a user modifies the Add Options of a subtable, it will allow them to see the changes without logging out and back in.

RESOLUTION: Notification Templates Unassigned from Workflow Task

Reference #: 250624.1267.10119

Users had noticed that Notification Templates were being unassigned from Workflow tasks without user input. A fix was applied and Notification Templates should work as expected with Workflow Tasks.

RESOLUTION: Field Mapper Fields Not Assigning

Reference #: 250624.1157.10231

Some users had noticed that dropdown fields arrow assignment in the field mapper was not assigning the field for mapping. A fix was applied and fields should map as expected.

RESOLUTION: Workflow Auto-Completing Tasks Not Auto-Completing

Reference #: 250624.349.10551

Some clients had noticed Auto Completing Workflow Tasks were failing to complete after receiving notification or after the workflow task scheduler had been run. The issue has been fixed and Auto-Complete tasks should complete as expected.

RESOLUTION: When Assigning Fields by Type, the Copy Fields functionality is mislabeled

Reference #: 250624.349.10692

The tool-tip when copying assigned fields by type for both the Core System and Vendor/Client Gateway was mislabeled. The tool-tip now indicates "Copy to Another Record Type" as expected.

RESOLUTION: Notification Templates Not Selectable on Workflow Tasks

Reference #: 250624.1267.10732

Some clients had found Notification templates were not selectable for Tasks in Workflows. This issue has been resolved, the Notification Templates assigned to the specific table now show and are selectable from the dropdowns on workflow tasks.

RESOLUTION: VISDOM Clause Replacement Error Message

Reference #: 250624.1222.10820

Incorrect text was present in an error when Clause Replacement was attempted on OCR'd PDFs with VISDOM Basic. This new text has been added: *Document type .pdf is not supported for clause replacement*.

RESOLUTION: Contract Cost Price Table Not Applying Existing Conditions

Reference #: 250624.1157.11311

An issue was found where the Set Conditions function for the Cost Price subtable was no longer filtering the visibility of the table on chosen contract record types. This has been resolved.

RESOLUTION: Audit Log Failures when using RecID

Reference #: 250624.317.11348

When adding/removing users from a department and viewing the Audit Log report there were times where filtering on Record ID could fail. This has been resolved.

RESOLUTION: Survey Emails Sent to Inactive Contacts

Reference #: 250624.1273.12065

When starting a Survey, if a contact or user was marked as inactive they were still receiving the emails. This has been adjusted so any inactive user no longer receives emails for Surveys.

RESOLUTION: Password field on Employee record cannot be edited

Reference #: 250624.349.11729

Users were unable to type into the Password field during both Add and Edit of an Employee record. This has been resolved so the the password field can be edited while creating a new Employee or updating an existing Employee record.

RESOLUTION: Unable to access a Dashboard when the Calendar is added more than once

Reference #: 250624.1250.12191

Both Standard and System Dashboards could not be accessed when the Calendar was added as a dock multiple times. This has been updated so that the Calendar option is removed once it is added to a dashboard.

RESOLUTION: Deleted files available to attach when sending an email

Reference #: 250624.1259.12470

Users noticed that previously deleted files from the Files/Attachments table were available to attach when sending a on-off email from a record. This has been updated so only active files are shown for attaching to an email.

RESOLUTION: Tooltips missing from icons on a record's Files/Attachments area

Reference #: 250624.1250.8622

Tooltips for the Preview and Document Toolbox icons were missing on the Files/Attachments area for all records. The tooltips have been added.

RESOLUTION: Auto-complete dropdowns and calendar placeholders not working when creating new record from existing record

Reference #: 250624.1208.8868/9047

When using the "Create New Record" button on an exisitng record, users reported auto-complete dropdown fields were not populating and the saved records were not showing the Effective Date and Expiration Date on their calendars. The issue was resolved and records created from an exisitng record are populating atuo-complete dropdowns and showing on calendars as expected.

RESOLUTION: Adding new entry to user-defined subtables

Reference #: 250624.345.8903

Users were receiving an error message when attempting to add a new entry to a user-defined subtable. This has been fixed so new entries can be added.

RESOLUTION: Days to Complete field not showing on Task Grids

Reference #: 250624.337.8931

The Days to Complete field was not displaying in the task grid. This has been resolved so the field will now display.

RESOLUTION: Vendor Email Responses not returning in system

Reference #: 250624.1259.9011/9290/11219

Emails sent in to records by vendors were not being received and added to the email chain on the record. Emails are now displaying as expected.

RESOLUTION: Certain documents with images could not be sent for signature

Reference #: 250624.1157.9279

Some image file types were not supported and could not be sent through the systems signing process. The process was updated to enable support for these images so they can now be sent for signature.

RESOLUTION: Bulk Update process not updating the Filtered data preview

Reference #: 250624.1245.9328

When using the Bulk Update process, the FIltered data preview was not updating once the update was processed. This has been resolved so the data and Filtered data preview are updated after processing the Bulk Update.

RESOLUTION: View Employee Permissions button not showing data

Reference #: 250624.349.9370

Clicking the View Employee Permissions button on a Contract Record was generating an issue report for some users. Users with permission should now be able to view employee permissions from a Contract record as expected.

RESOLUTION: Multiple pages on the hierarchies grid only loading first page

Reference #: 250624.1208.9401

Users were unable to view the hierarchies grid list on Contracts past the first page of results. This has been fixed so navigating the grid shows all hierarchies.

RESOLUTION: Price/Cost line item import not tracked in audit logs

Reference #: 250624.1250.9620

Performing an import of Price/Cost Line Items on a record was not logging in the history or audit logs. This has been updated so the logs indicate a record(s) has been imported.

RESOLUTION: External parties receiving inaccessible link for email attachments when configured for "Time to life link"

Reference #: 250624.1259.9800/9810

When sending a one-off email with an attachment, external parties were receiving the system user's link to download the attachment if the Email Attachment Type configuration setting was set to "Time to life link". This has been resolved so users receive the correct link to access the attachment.

RESOLUTION: Standard license users no longer able to enter Notes on Vendor records

Reference #: 250624.337.9866

Users with a Standard level license were no longer able to enter Notes on Vendor/Company records. Two new out of the box permissions were added to allow Standard license users to Add or Delete Notes from Vendor/Company Records:

- Setup: Vendors/Customers - Add Notes
- Setup: Vendors/Customers - Delete Notes

RESOLUTION: Document Compare unavailable

Reference #: 250624.337.9990

When attempting to use the Document Compare functionality, some users were receiving a message stating Document Compare was unavailable. This has been resolved.

RESOLUTION: Bulk Delete button missing from Price/Cost Line Items table

Reference #: 250624.1092.10010

Users noted that the Bulk Delete button on the Price/Cost Line Items table was missing. This has been fixed so the button is avaliable.

RESOLUTION: Search Results Headers Not Scrolling

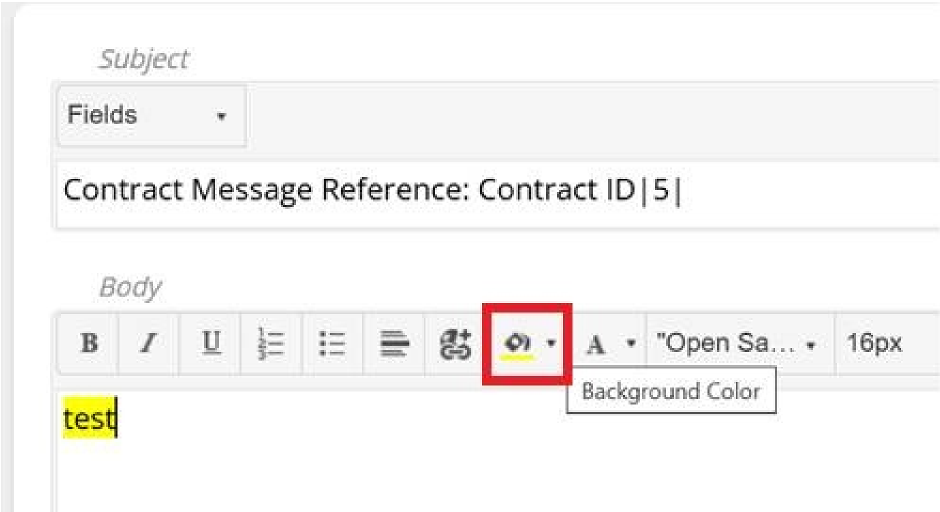
Reference #: 250624.349.10012

Users found that the column headers were remaining static despite the results being movable when a user attempted to scroll horizontally on the Find/Search pages; this has been resolved. Now the entire search grid move as expected with no discrepancy between headers and results.

RESOLUTION: Field Mappings Mapping Incorrectly on Email Templates

Reference #: 250624.1259.10018

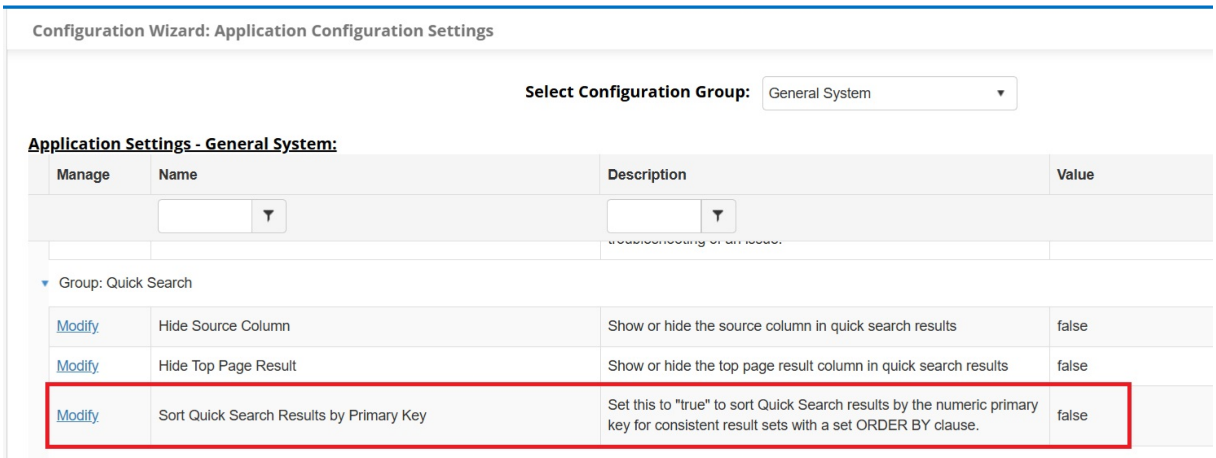
Clients had found some fields they would expect to be available were not available for selection on email templates, and some placeholders were not filling correctly. A fix was applied and the expected fields should be available and map correctly. Additionally, the option to highlight and un-highlight fields was added in the email template editor.



RESOLUTION: Quick Search Forced Order By

Reference #: 250624.1203.10006

Some clients had found the ordering for quick search by Primary Key to be inconvenient or unwanted. A new Config Setting was added to the Quick Search Group in the General System Configuration Group: Sort Quick Search Results by Primary Key.



When this setting is true, Quick Search Results will be ordered by the ID field. If it is false, the results will not be ordered by the ID field.

RESOLUTION: Unable to Log in via SSO with Outlook Add-In

Reference #: 250624.1237.10384

When using SSO within the Outlook Add-In users were getting a pop-up message and it was not allowing them to utilize SSO. This has been resolved and when using SSO with Outlook Classic, Modern, and Web it should all function the same.

RESOLUTION: Error on Adding New Company

Reference #: 250624.1203.12606

Some clients were receiving an error message every time a new Company record was created, although the record would be added and appear in the Company List. A fix was applied and the Company Record creation process should proceed as expected.

RESOLUTION: Word Add-In Timeouts

Reference #: 250624.1231.6518

Users were having timeouts when trying to Upload a document from Core to Online Word and make edits. Users were having timeouts from clicking the Record Details button. Users were also not able to upload files from the Add-In to the Core system. These concerns have been resolved and users should be able to use these pieces again.

Update 22.5.0 - Module: Document Collaboration & E-Signature

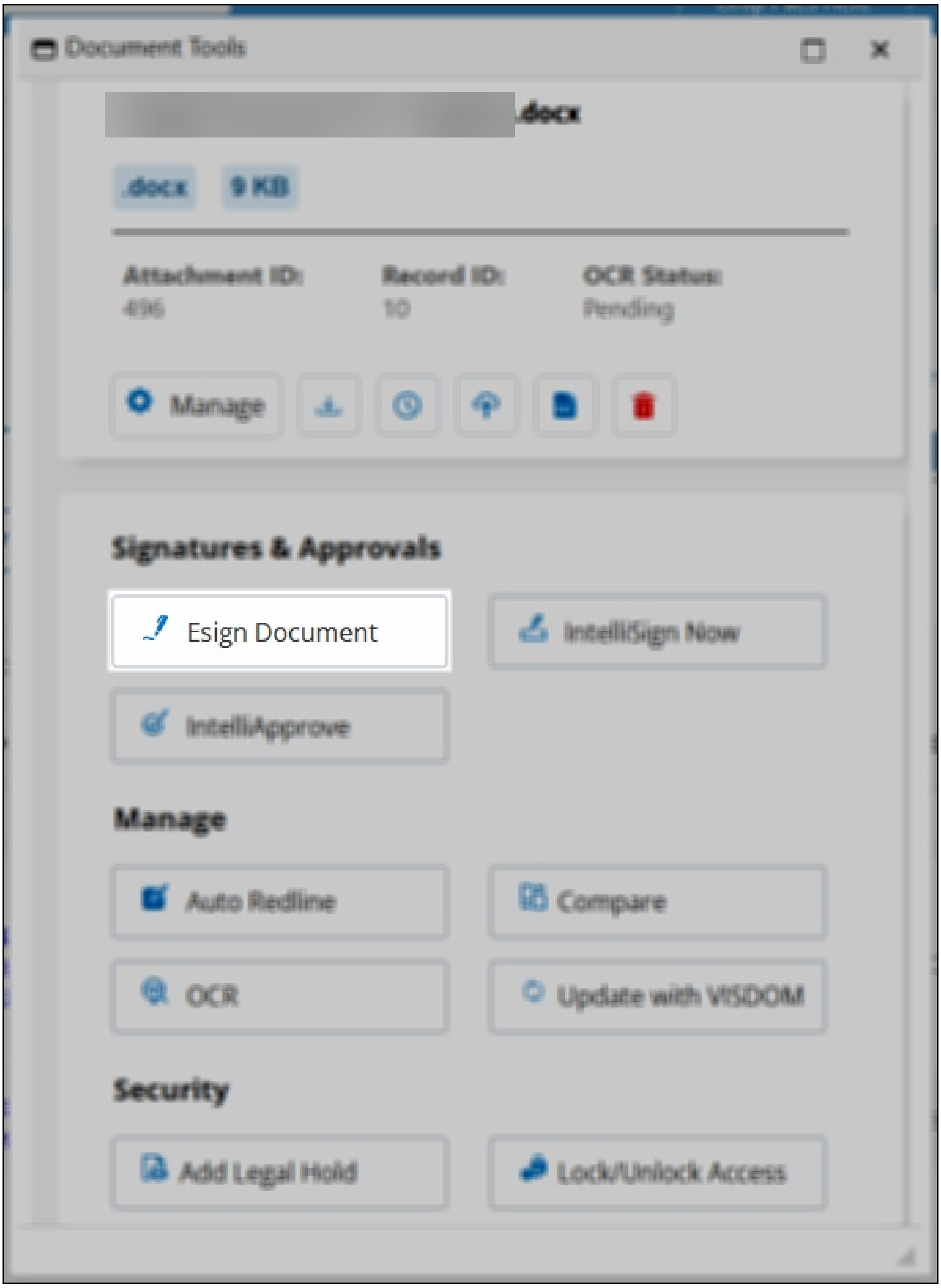
Optional Add-On Module for the collaboration of documents between internal and external users/participants. This module utilizes E-Approval (Electronic Approval) and/or E-Signature (Electronic Signature) processing to support full online negotiation via a secure online portal.

DOCUMENT COLLABORATION & E-SIGNATURE NEW FEATURES

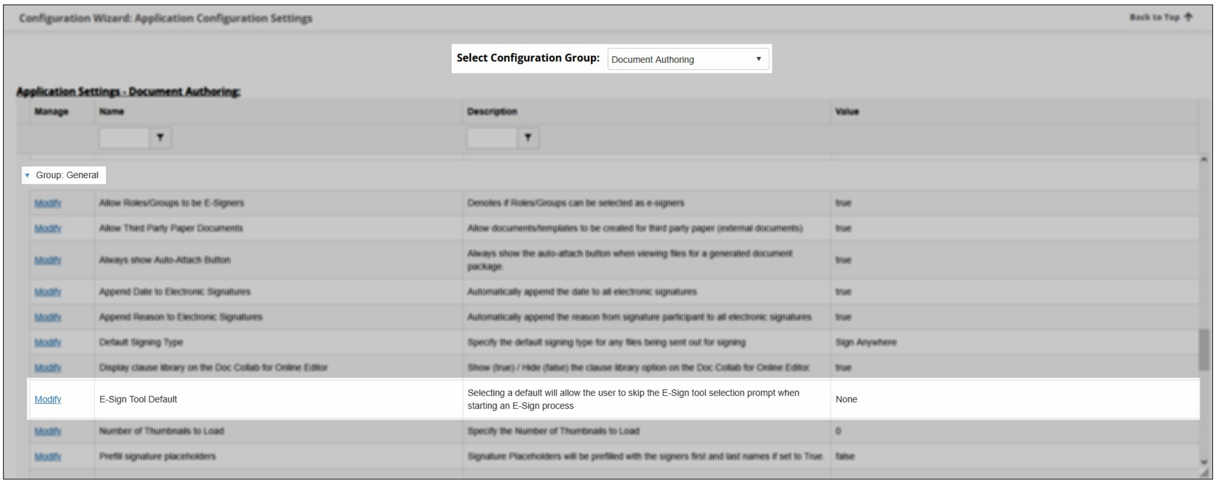
NEW FEATURE: Set a default E-Signature Process

Reference #: 250624.1092.10086

A new configuration setting has been added to allow System Administrators to define a default process when their users choose the Esign Document button from the Document Toolbox on a file.



The configuration setting can be found under Manage/Setup > Application Configuration > Config Settings. Choose Document Authoring from the dropdown then, under the General group, you will see E-Sign Tool Default.



Setting this configuration will take the user direct to the chosen default signing process. Depending on licensed signing tools, System Administrators can select from:

- AdobeSign
- DocuSign
- IntelliSign
- None *(default out of the box selection)*
- SignNow

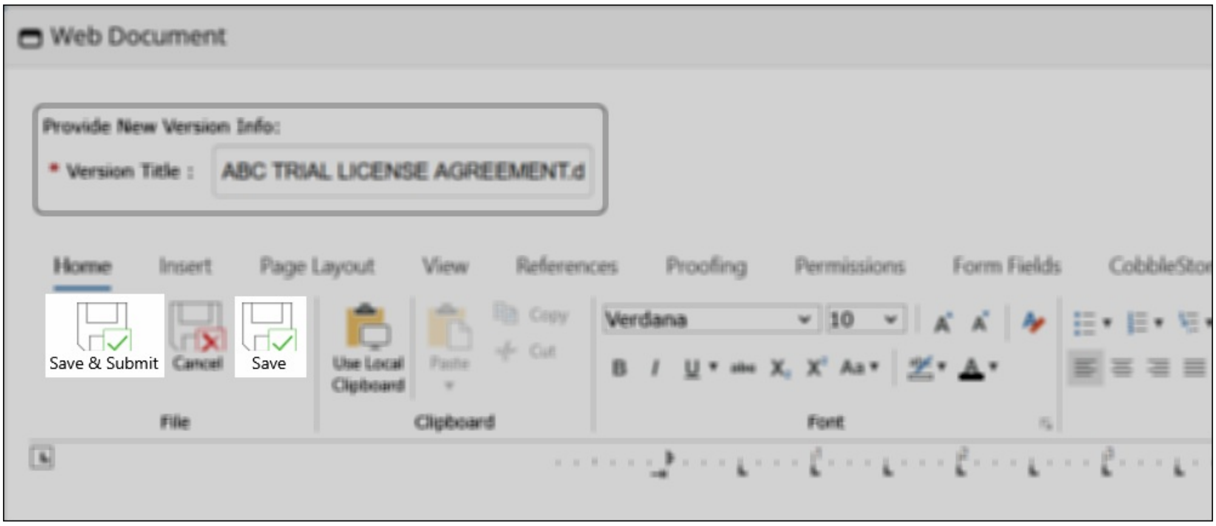
<u>How will this affect users?</u>

If System Administrators have chosen a default E-Sign Tool, users sending a document for signing through the Document Toolbox will no longer have to select which signing tool to use.

NEW FEATURE: IntelliApprove: Save changes in Online Editor without automatically sending to next Approver

Reference #: 250624.345.10073

The ***Save*** button on the IntelliApprove Online Editor has been split into two options: ***Save & Submit*** and ***Save***.



Splitting this button enabled a new feature during the process where an Approver can review the document using our Online Editor and click the ***Save*** button to save their changes without sending to the next Approver. This allows them to return to the document and continue making changes until they are finished making changes. Once the changes are complete, the Approver can click on ***Save & Submit*** to finalize their changes and send the Approval process to the next person.

How will this affect users?

Approvers reviewing a document during an IntelliApprove process will be able to save their changes mid-review and return to the document later to finalize.

DOCUMENT COLLABORATION & E-SIGNATURE ENHANCEMENTS

ENHANCEMENT: Certificate of Completion Improvements

Reference #: 250624.345.8266

Improvements have been made to the Certificate of Completion. The following new information now displays:

- Document pages
- Certificate pages
- Signature placeholder count
- Text placeholder count
- Date placeholder count
- Time zone
- Signature Adoption

How will this affect users?

If configured to attach, end users will now see additional information in the Certificate of Completion attached at the end of a signing process.

ENHANCEMENT: Update to enable scrolling in the PDF Previewer

Reference #: 250624.345.8277

Previewing a document during the E-Approval, E-Signature, IntelliSign, and IntelliApprove processes has been enhanced to allow for continuous scrolling through a multi-paged document. Users will now have multiple options for navigating through a document: continuous scroll, page arrows, page selection, or by selecting the page from a thumbnail preview.

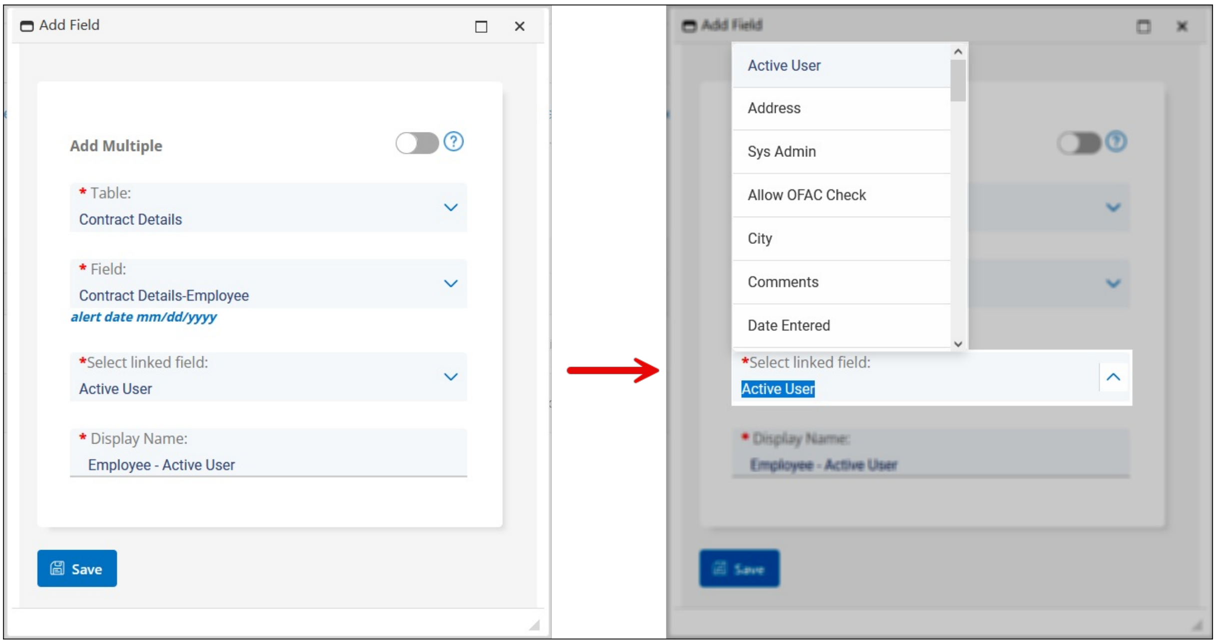
How will this affect users?

End users will be able to continuously scroll through a document when approving or signing for a seamless review.

ENHANCEMENT: **Additional selection options for Mergeable dropdown fields on a Document Template**

Reference #: 250624.1092.8295

Similar to Ad-Hoc Report dropdown fields, additional options are now available for dropdown fields linked to other tables within the systme when selecting Mergeable Fields on a Document Template. For example, when selecting Contract Details as the Table, users can choose Employee as the field which then offers additional options from the Employee record.



How will this affect users?

End users building a Document Template will have more options to choose from when selecting fields linked to other tables in the system.

ENHANCEMENT: **Validation on saving when adding placeholders**

Reference #: 250624.1092.7928

Wen setting Signature, Text, or Date placeholders for an E-Signature process, a loading icon will appear for 3-5 seconds as an indication the placeholder was added. This also appears if the user clicks the Save button in the sidebar.

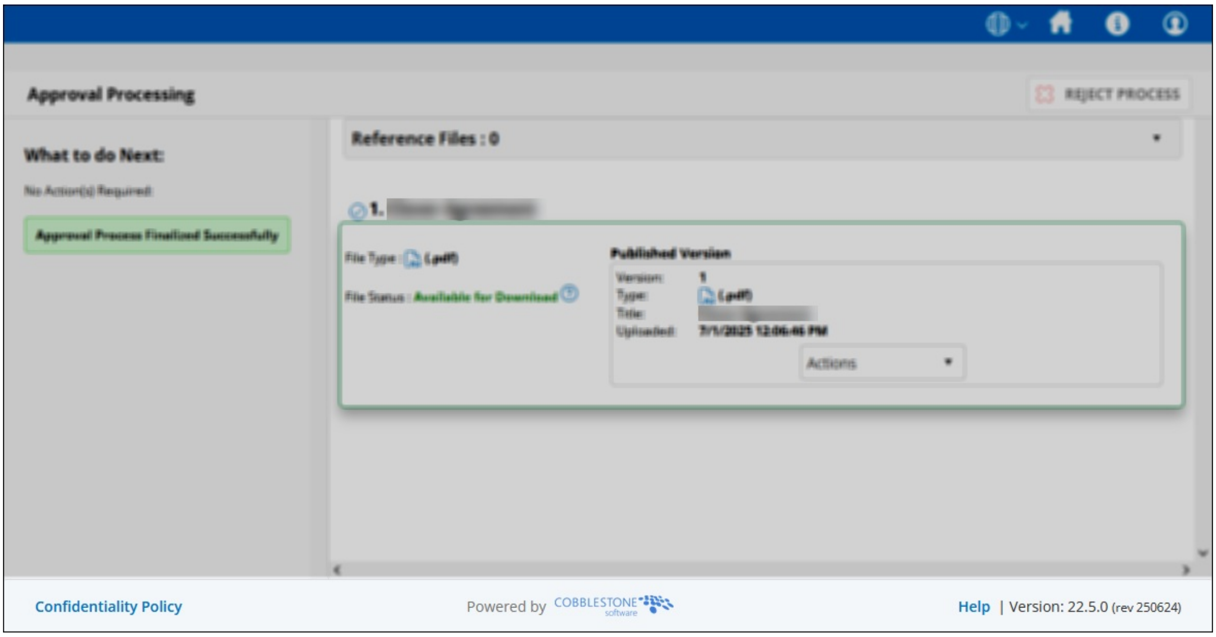
How will this affect users?

Users will have visual confirmation that their changes were being applied when adding placeholders to a document during the E-Signature process.

ENHANCEMENT: UI Update to Footer when Approving or Signing a document

Reference #: 250624.1216.8565

The page footer during the Approval or Signing of a document has received a UI update. This update aligns with our continuous UI throughout the system.



<u>How will this affect users?</u>

End users are not affected by this change.

DOCUMENT COLLABORATION & E-SIGNATURE RESOLUTIONS

RESOLUTION: Document Template not accessible after removing and adding new mergeable clauses

Reference #: 250624.1092.14183

There was an instance where users added Mergeable Clauses to a Document Template and then replaced said Clauses by removing and adding new ones. Doing this caused the Template to no longer be accessible. This has been resolved so deleted Mergeable Clauses will still allow the user to access the Document Template.

RESOLUTION: IntelliApprove process unable to be routed under a specific scenario

Reference #: 250624.1157.12061

When Simple Participant Approvals was enabled if an IntelliApprove process was started where the External participant was the first sequence followed by an Employee participant the second participant wasn't receiving the invite. This has been resolved so if the setting is enabled/disabled they will still receive the invite.

RESOLUTION: Document Track Changes not enabled by default in IntelliApprove

Reference #: 250624.1157.11650

An issue where the Track Changes function is not set to true on the IntelliApproval process. A new setting to Enable Track Changes has been added to the IntelliApprove Process Info setup window.

RESOLUTION: Document Template Type of Internal Document obsolete

Reference #: 250624.1157.10581

Users were able to create an older style of Document Templates called Internal Document. This caused issues when trying to perform certain actions with this type. We have disabled this type of Document Template and if users would like to use a similar tool they can use the Document Builder off of a Document Package template.

RESOLUTION: Document Signature Gateway - Icons not displaying properly

Reference #: 250624.1157.10751

When changing the header color of the system to white and starting an IntelliSign/IntelliApprove process the header icons were appearing as gray and one of the icons was not displaying. We have adjusted the icons so if the header color is white it will display black icons.

RESOLUTION: IntelliSign Signatures Fuzzy Upon Completion of Signing

Reference #: 250624.345.6136

When doing an IntelliSign process users were seeing pixelated signatures. Users should now be able to view the finalized process without pixelation when viewing inside of the process and when downloaded. This issue has been resolved.

RESOLUTION: PDF Online Editor not saving Comments

Reference #: 250624.345.9601

When adding comments to a PDF document in the Online Editor they were not being saved. This is a limitation of the Online Editor and has been hidden as to not confuse any other users.

RESOLUTION: Document templates not merging

Reference #: 250624.1208.9331

Some users were receiving an error message at the top of the Document Merge screen when attempting to merge a Document Template or Third-Party Paper Template. This has been resolved so the error no longer appears and the template merges as expected.

Update 22.5.0 - 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.

E-SOURCING/PROCUREMENT MANAGEMENT ENHANCEMENTS

ENHANCEMENT: **Add email options back to Solicitations and update Q&A table emailer**

Reference #: 250624.1259.9696

The option to Email Respondents and Email Awarded Vendors has been added to the Email Dock on Solicitation Records. These options appear as buttons next to the send email button when requirements are met. The Email Respondents button will appear on the dock after you have assigned a Respondent to the Solicitation record and the Record is set to invite only or Public, if neither of those options are assigned than the Email Respondents button will remain hidden. The Solicitations Questions and Answers table also uses the SendGrid emailer now.

How will this affect users?

Users will be able to leverage the SendGrid emailer for the full range of Solicitation Email options.

ENHANCEMENT: **Extend Pricing Sub-Table for E-Sourcing**

Reference #: 250624.1250.2389

The Pricing Line Items Table has been modified so when users create a new Contract from an E-Sourcing record with pricing line items, the pricing line items will carry over into the Contract if they are assigned to the Awarded Vendor.

How will this affect users?

Users will have an easier workflow when creating Contracts from E-Sourcing records.

ENHANCEMENT: **Remove ID fields from Bid Rating Weight table on Solicitation**

Reference #: 250624.1250.2273

We have removed Solicitation ID, Solicitation Rating Weight ID, and Solicitation Rating Weight GUID from the grid when viewing the Bid Rating Weight table. If you click View on a Record you will be able to see the ID fields that were removed.

<u>How will this affect users?</u>

Users will have a cleaner view and easier time seeing important information on the Bid Rating Weight table

Update 22.5.0 - Module: Vendor/Client Collaboration Gateway

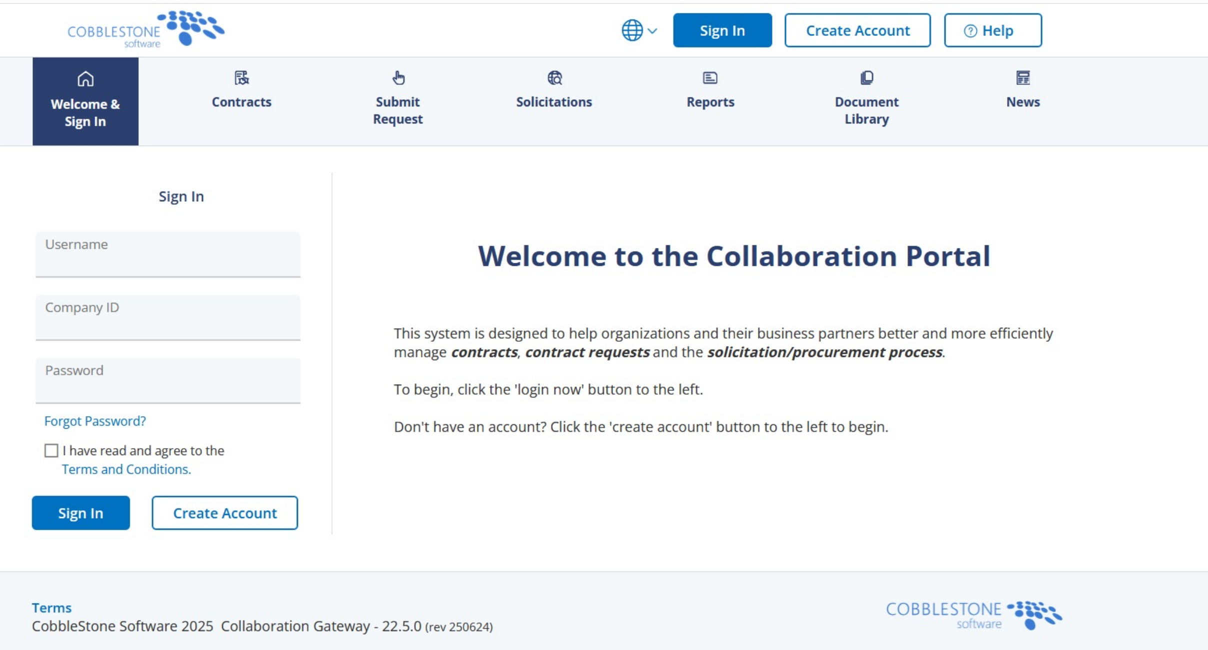
Optional Add-On Module used to extend the functionality and collaboration scope of Contract Insight by providing a dedicated gateway portal for your vendors, suppliers, providers, clients, customers, respondents, etc. to view and interact with the contracts, solicitations, etc. you have with them.

VENDOR/CLIENT COLLABORATION GATEWAY NEW FEATURES

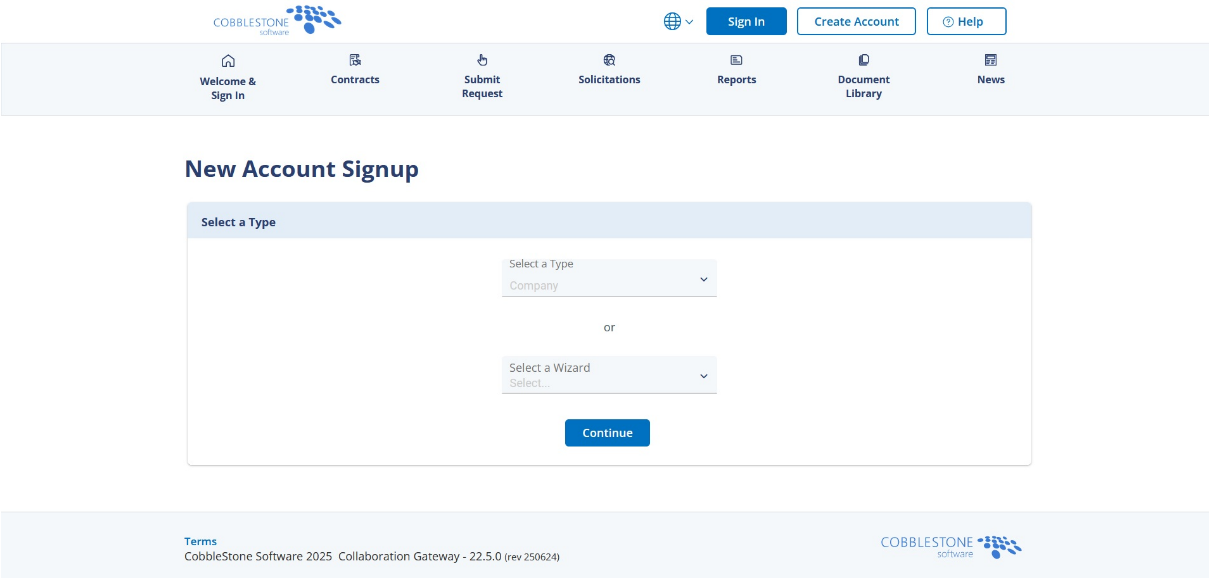
NEW FEATURE: Vendor/Client Gateway Overhaul

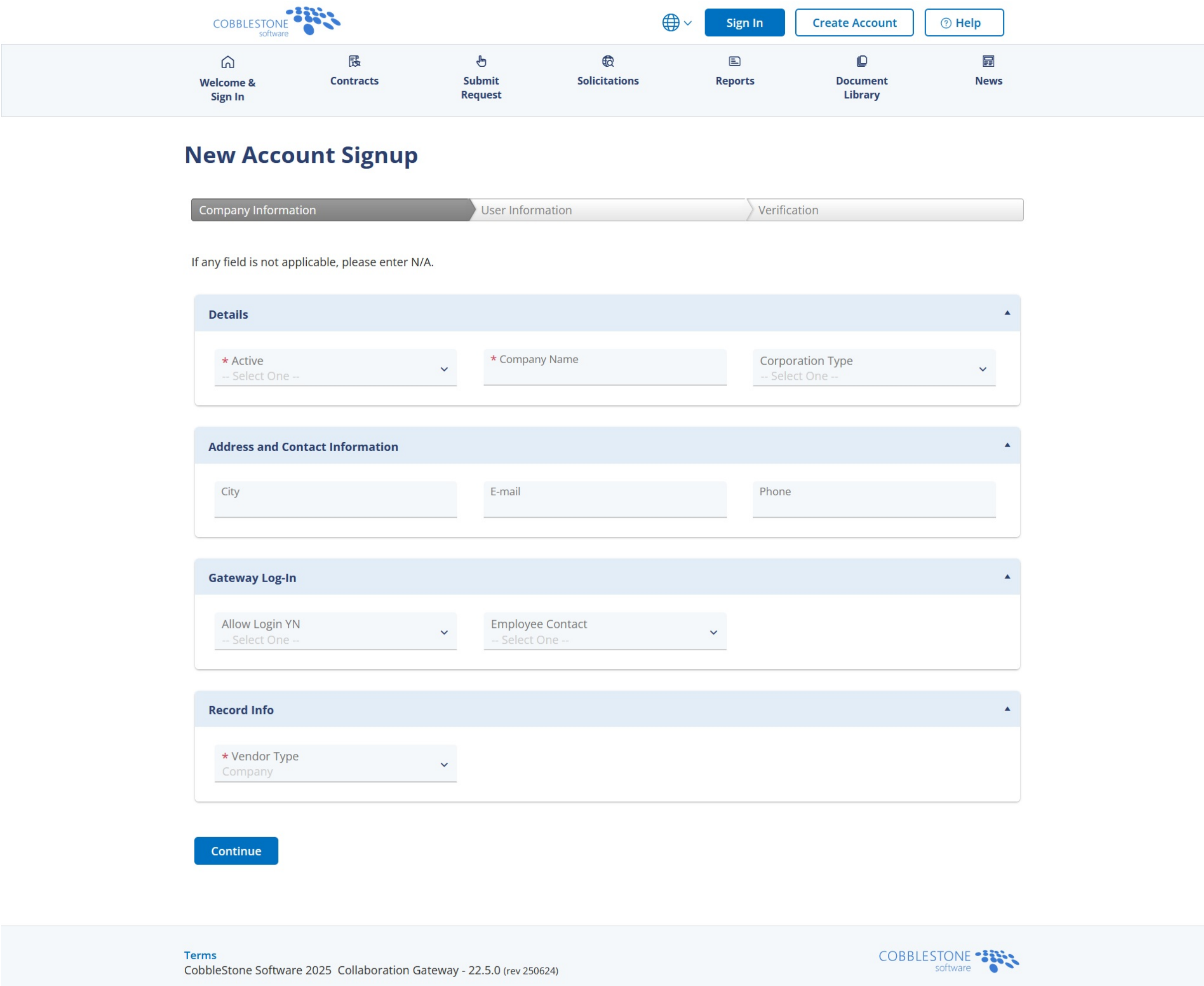
Reference #: 250624.1203.6650

The Vendor/Client Gateway has been redesigned, giving it an updated look and feel. When users first get to the Welcome page, they will notice a streamlined interface.

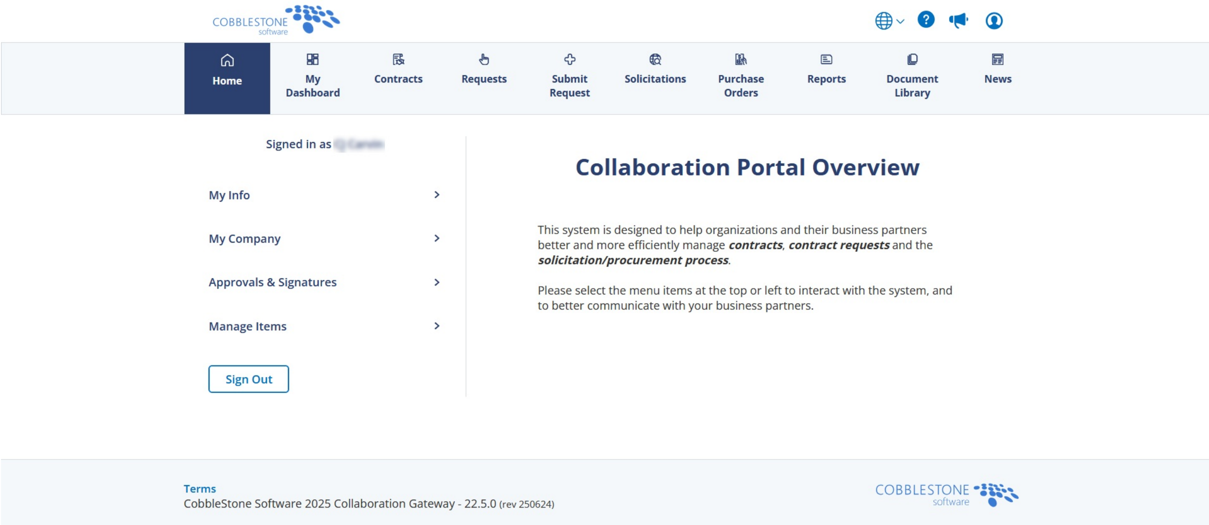


For new users who need an account, clicking on the Create Account button at the bottom of the Sign In will direct the user to the New Account Signup page where they can select the Type or a Wizard to use for :

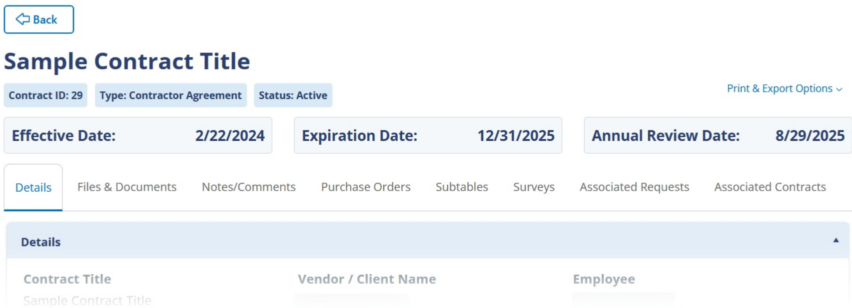




Once logged in, the user will be able to view information they have access to:

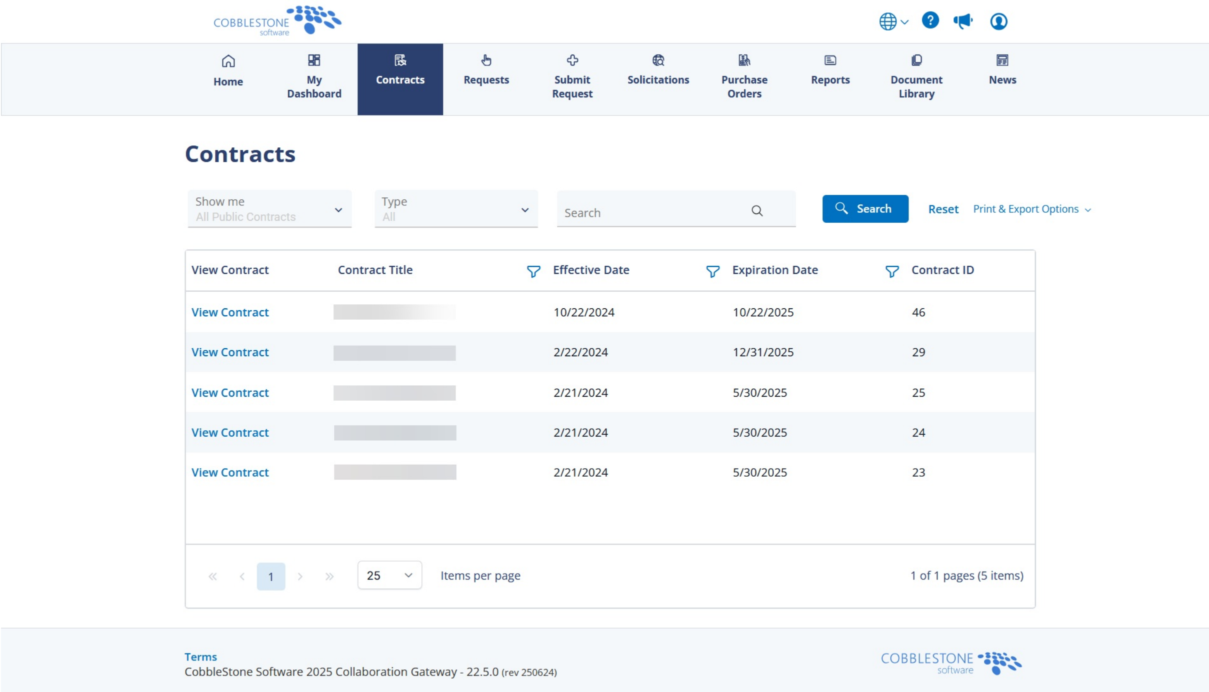


The record details screens have been updated as well to highlight key information as well as bring the Tabbed Details screens from the Core system into the Vendor/Client Gateway.

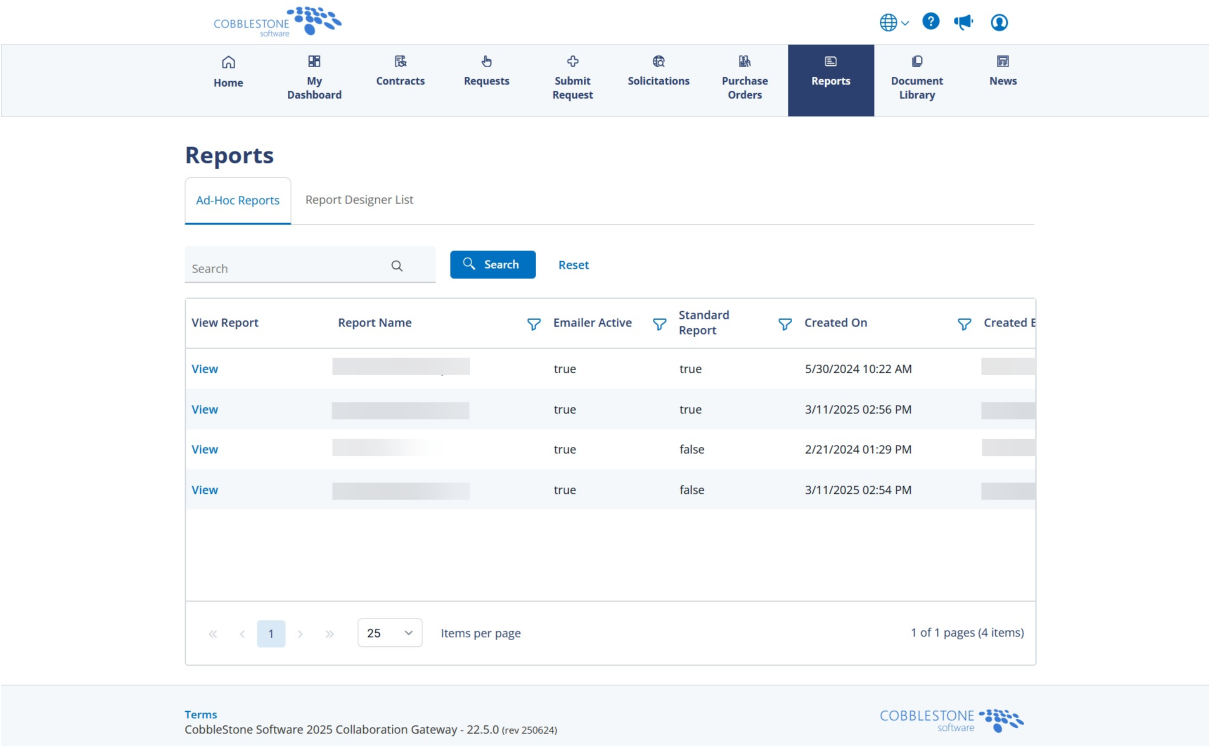


And an updated grid style and tabbed layout can be found throughout the site:

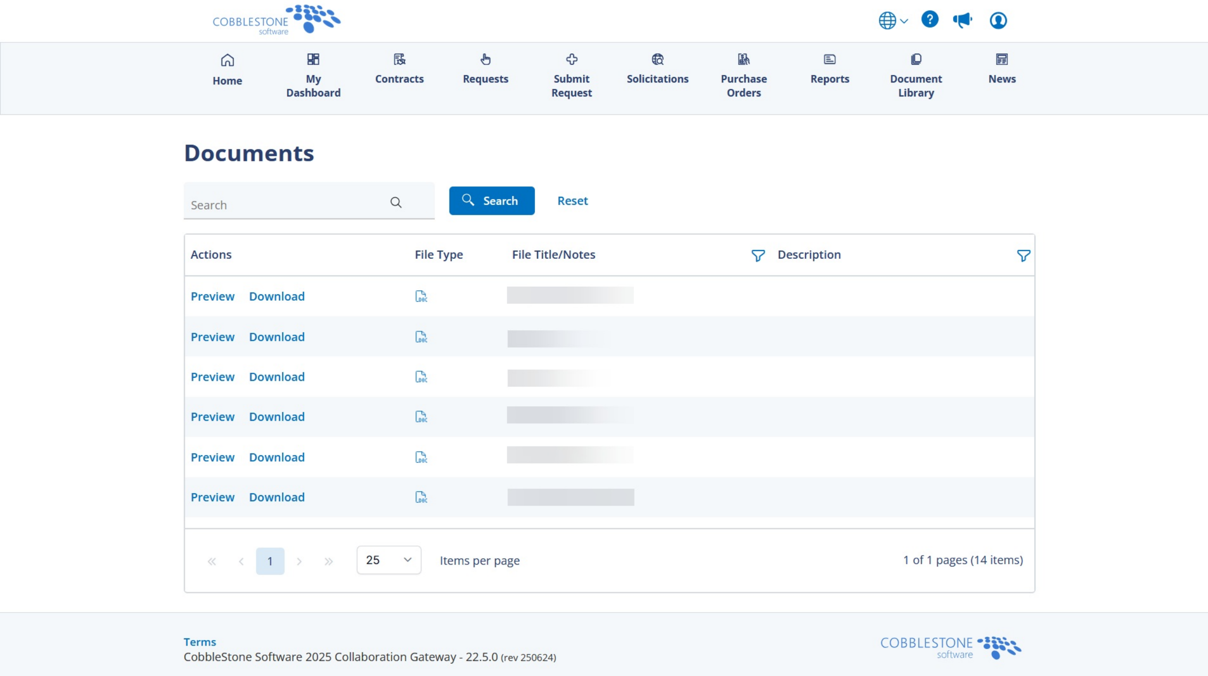
Contract List



Reports Grid



Document Library



<u>How will this affect users?</u>

Users will enjoy a cleaner more modern interface when interacting with the Vendor/Client Gateway

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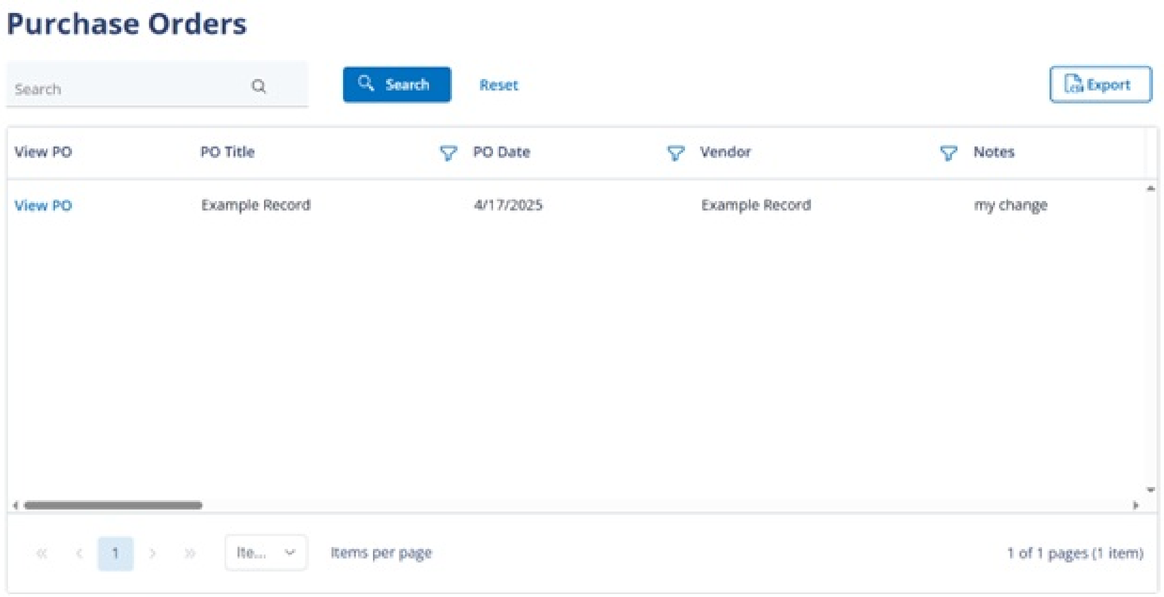
VENDOR/CLIENT COLLABORATION GATEWAY ENHANCEMENTS

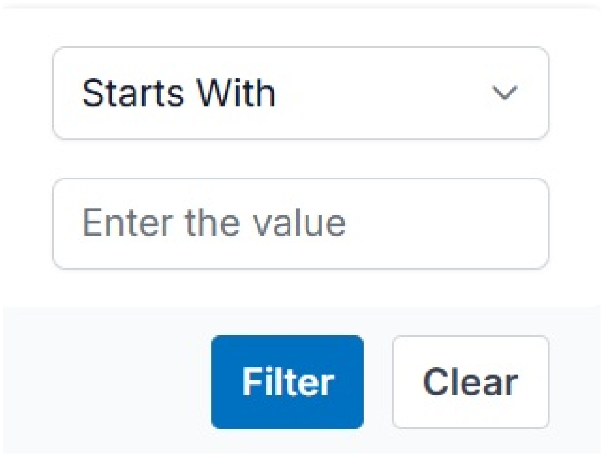
ENHANCEMENT: New Grids

Reference #: 250624.1203.7558

We have introduced new grids that will replace the old grids in the Vendor / Client Gateway. This change should improve the performance of filtering, sorting, paging and overall usability of the grids within the Gateway. They have a similar style to the old grids with slight differences in spacing with how the grids are built.

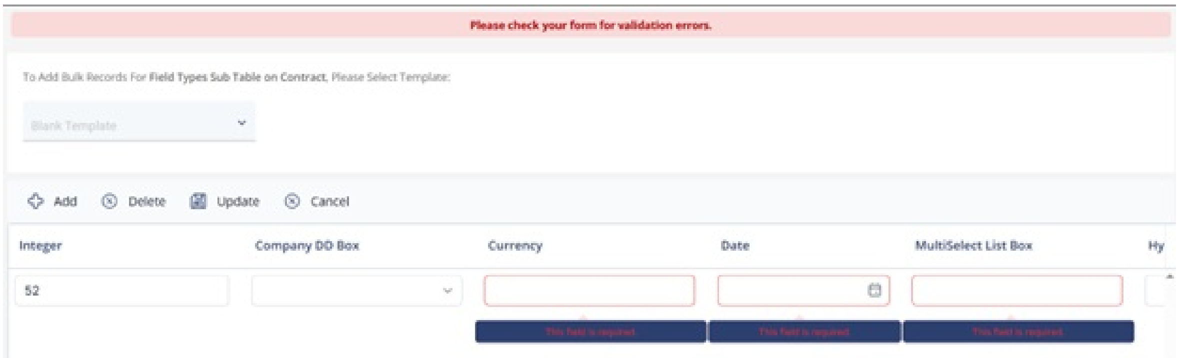


Click the Filter icon for a field and it will allow you to select the type of filter you would like to apply. The type of filter will differ depending on the field type.



If you would like to sort you can click the column of a field and it will sort. There is the ability to do multiple sorts. After clicking on a column every column requires a CTRL + M1 in order to perform multiple sorts on a grid.

We have also modified the Bulk Add off of a subtable. With this new approach you can use the Bulk Add to delete an item before it is added allowing users to go back and remove a line item that may not be needed. You can also click cancel to leave the menu. The biggest change with this that users should be aware of is when you're finished making changes to the Bulk Add you have to tab out or click off of the grid to leave a cells edit mode. If the table is still in edit mode it won't allow the form to be submitted.



__How will this affect users?__

Users will have a better, more intuitive grid interface.

ENHANCEMENT: **Updated Footer and Logout**

Reference #: 250624.1203.12798

Clicking on the CobbleStone logo in the footer will open a new tab and direct visitors to CobbleStone Software's website. In addition, when authenticated users log out of the Vendor/Client Gateway, CobbleStone's linked logo remains in the footer and is no longer in the center of the screen.

ENHANCEMENT: **Better interaction with Announcements**

Reference #: 250624.1171.7044

The Announcement list has been enhanced to be more modern looking and clickable. Clicking on an announcement brings the user to the updated news page where they can view it in full, in addition to seeing all the other news and announcements.

__How will this affect users?__

Users will have a more intuitive interaction with announcements they want to read.

ENHANCEMENT: **Allow Vendors to Add/Edit multiple line Items at once and at any time before the bid is fully submitted or closed**

Reference #: 250624.1203.8064

Users can now add, edit, and delete multiple line items at once. Navigate to a E-Sourcing record that has Line Item bids enabled and select the Pricing tab. Once selected click Edit Price Items and select Add and fill out all the fields associated with the line item. Once done ensure that you click off of the grid and then select Update to finalize your changes.

__How will this affect users?__

This offers a faster workflow for users looking to bulk add line items.

ENHANCEMENT: Record search improvement

Reference #: 2506424.1203.10363

All grids on the Vendor/Client Gateway now have a search bar that can search across all fields on the grid.

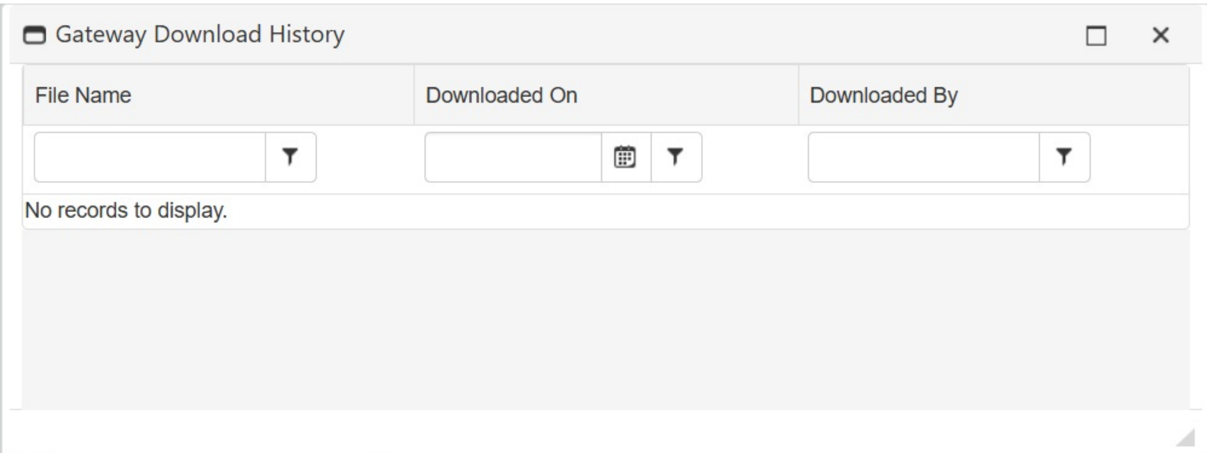
__How will this affect users?__

This will allow users to have more control over what they're searching for on these grids.

ENHANCEMENT: Indication of document download

Reference #: 2506424.1171.6781

We have added the ability to track Gateway Download History from the Files/Attachments of a record. This will enable Vendors and Core users to view the download history of a record. On the Core side click Gateway Download History from the Attachments & Templates tab next to Compare Documents. This will open a window with File Name, Downloaded On, and Downloaded By.



On the Vendor/Client Gateway side, once a file is downloaded and the record is refreshed, there will be a check mark next to the file name to indicate a download. Hovering over the check shows who was the last to download the file and the date downloaded. This is filtered by Vendor so Contacts associated to a Vendor will only see downloads associated to their Vendor. Core users can see downloads of all Vendors associated to a record.

This is disabled on Employee profiles as there aren't Employees within the Gateway to track download history.

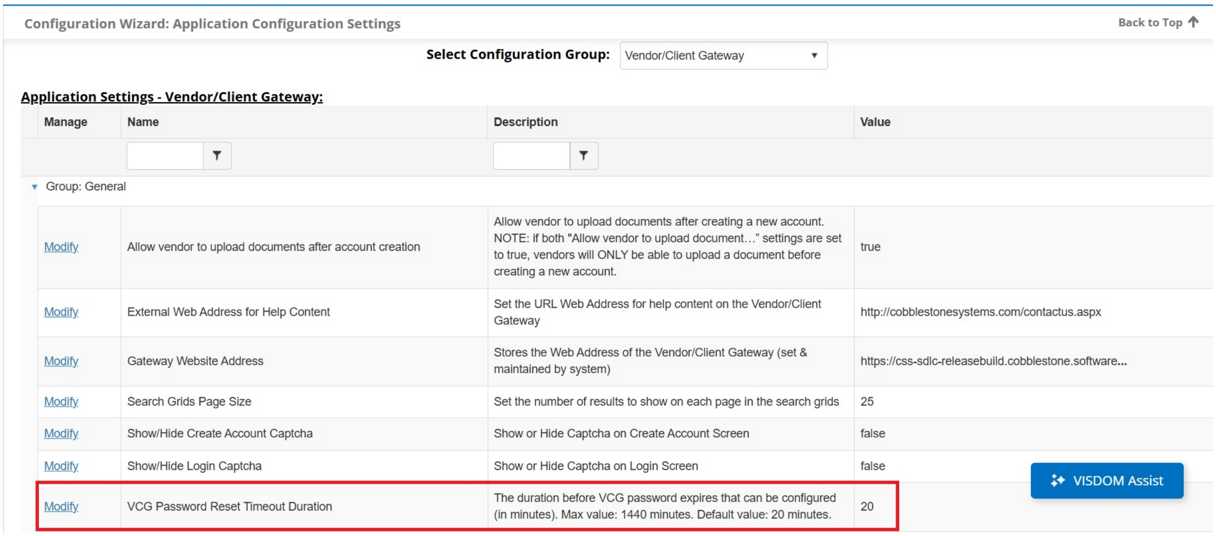
How will this affect users?

Users will have a clearer idea of who has downloaded a document.

ENHANCEMENT: Extend VCG Password Reset Link Time

Reference #: 2506424.1171.6790

Anew configuration setting has been added to the General Group in the Vendor/Client Gateway Configuration Group in the core system to give admin users the ability to edit the expiration time limit for VCG Password Reset links.



Manage	Name	Description	Value
Modify	Allow vendor to upload documents after account creation	Allow vendor to upload documents after creating a new account. NOTE: if both "Allow vendor to upload document..." settings are set to true, vendors will ONLY be able to upload a document before creating a new account.	true
Modify	External Web Address for Help Content	Set the URL Web Address for help content on the Vendor/Client Gateway	http://cobblestonesystems.com/contactus.aspx
Modify	Gateway Website Address	Stores the Web Address of the Vendor/Client Gateway (set & maintained by system)	https://css-sdlc-releasebuild.cobblestone.software...
Modify	Search Grids Page Size	Set the number of results to show on each page in the search grids	25
Modify	Show/Hide Create Account Captcha	Show or Hide Captcha on Create Account Screen	false
Modify	Show/Hide Login Captcha	Show or Hide Captcha on Login Screen	false
Modify	VCG Password Reset Timeout Duration	The duration before VCG password expires that can be configured (in minutes). Max value: 1440 minutes. Default value: 20 minutes.	20

ENHANCEMENT: Add Logout or Return to Home link on VCG and Core Signing Page

Reference #: 2506424.345.10077

If a user who was not the currently signed in user on the Gateway or in Core had clicked on a signing/approval link where they were not the signer/approver, they were taken to a screen that let them know that this process was not for the currently logged in user, but had no way to log out. Alog out option has been added to that page.

VENDOR/CLIENT COLLABORATION GATEWAY RESOLUTIONS

RESOLUTION: Gateway Login Type

Reference #: 250624.1259.12611

When setting Gateway Login Setting to Simplified, the emails that went out were being duplicated and sent to users without a username. A fix was applied and now the emails with new usernames will only go to users who are Active and have a username with a company that is active and allows logins on the gateway.

RESOLUTION: Company Menu Item on Vendor Gateway

Reference #: 250624.1171.12754

When switching the Company menu item in the Vendor/Gateway from a child menu item under Contacts/Users to a top-level menu item, it was still visible to non-company administrators and would fail to load if clicked by these users. This has been resolved.

Update 22.5.0 - 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.

EXTERNAL E-SIGN INTEGRATIONS RESOLUTIONS

RESOLUTION: Signed document not attaching to record when Adobe Acrobat Sign process completed

Reference #: 250624.1086.10267

When the Adobe Acrobat Sign configuration for Audit Import Preference was set to Import the final Audit Report, the signed document was not attaching to the record as expected. This has been resolved.

Update 22.5.0 - Aggregated Data Feed Services

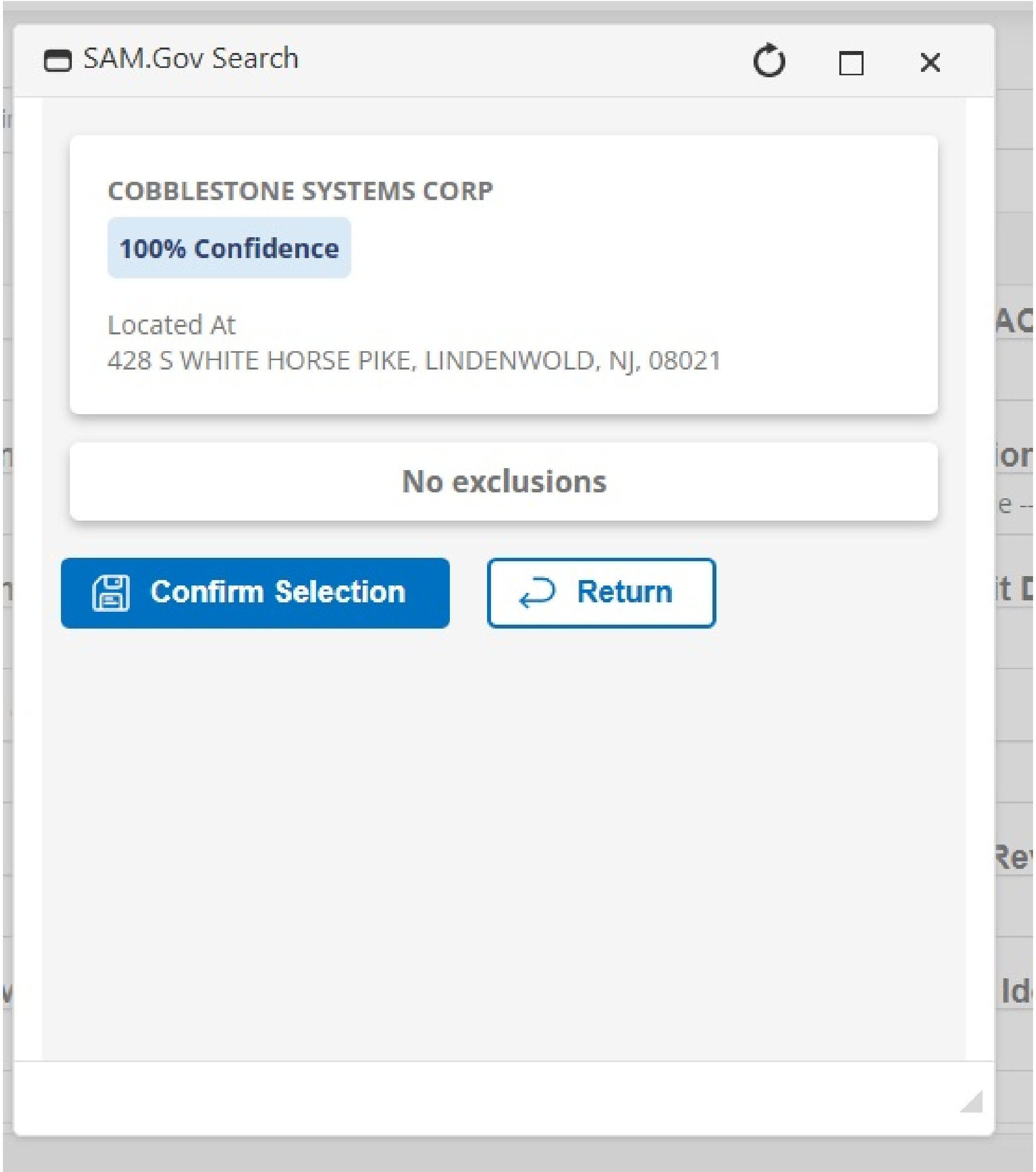
Optional Add-On Data Feeds that provide your organization with the capability of pulling in feeds of data relating to risk, compliance, contract management, procurement management, etc. from CobbleStone's Data Aggregator Service. Currently this service is configured for data feeds from OFAC.

AGGREGATED DATA FEED SERVICES
NEW FEATURES

NEW FEATURE: SAM.Gov Improvements

Reference #: 250624.1203.1078

When adding a Vendor using the SAM.Gov search using a Vendor Name, our tool performs a fuzzy logic search on the name to bring back a list of possible vendors. Selecting a match uses this company to quick fill the Address, SAM.Gov Identifier, and CAGE Code fields. Once a match is selected, the SAM Identifier will also be used to check for Exclusions. A search using the CAGE Code or SAM Identifier number will only return exact matches.



In order to effectively use this functionality, the Allow SAM.gov Check, SAM.gov Identifier, and SAM.gov CAGE Code fields must be present on the Company Add screen.

Any Exclusions associated with the SAM Identifier will be tracked in the SAM.Gov card in the Finances & Confidence Dock, and on the Risk Analysis Management Page.

How will this affect users?

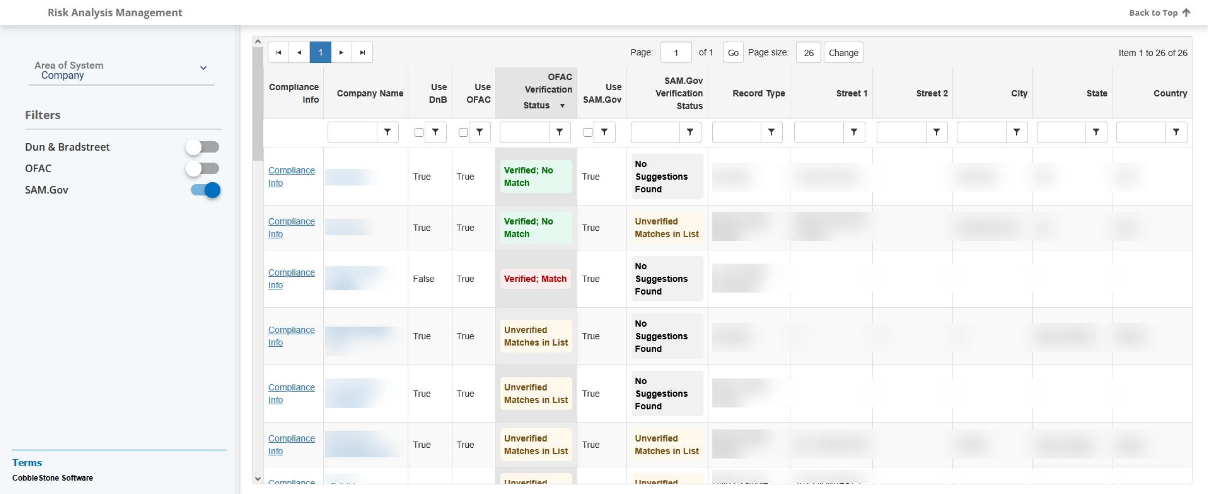
Users will be able to more effectively add companies using their SAM.Gov information, and track any exclusions more easily in order to better manage risk.

AGGREGATED DATA FEED SERVICES ENHANCEMENTS

ENHANCEMENT: Risk Analysis Management Page UI Enhancements

Reference #: 250624.1203.12182

The new Risk Analysis Management pages have been given a facelift, with more intuitive links and resized grids. They have also been moved to the Company Compliance Review and Employee Compliance Review main menu areas.



AGGREGATED DATA FEED SERVICES RESOLUTIONS

RESOLUTION: Date fields on Risk Compliance section

Reference #: 250624.1203.11230

The date in the OFAC, Dun & Bradstreet, and SAM.Gov risk rating cards has been update to clarify that it is the date of the last update.

RESOLUTION: OFAC Scheduler

Reference #: 250624.1203.11934

The Date Fields on the OFAC Risk cards have been updated. Last Update Received shows the last time the OFAC data associated with the record was updated by the monitor. Last Checked shows the last time the scheduler ran the OFAC check against the OFAC list.

RESOLUTION: OFAC Field Mapping Schedule Check

Reference #: 250624.1203.11172

There was an issue when running the scheduler for OFAC. This has been addressed and should work as intended.

RESOLUTION: OFAC Field Mapping Schedule Log

Reference #: 250624.1203.11164

Clients had noticed that enabling or disabling monitoring for OFAC for companies and employees was not being logged in every area that monitoring could be enabled or disabled. A fix was applied and the enabling and disabling of OFAC monitoring will be tracked consistently across the different points of enabling/disabling.

RESOLUTION: Country Field Mapping for Data Aggregator Service

Reference #: 250624.1203.11829

Users had noticed they were unable to save a field mapping for the Country property when configuring OFAC. A fix was applied and the Country field should be able to save a mapping as expected.

Update 22.5.0 - VISDOM+

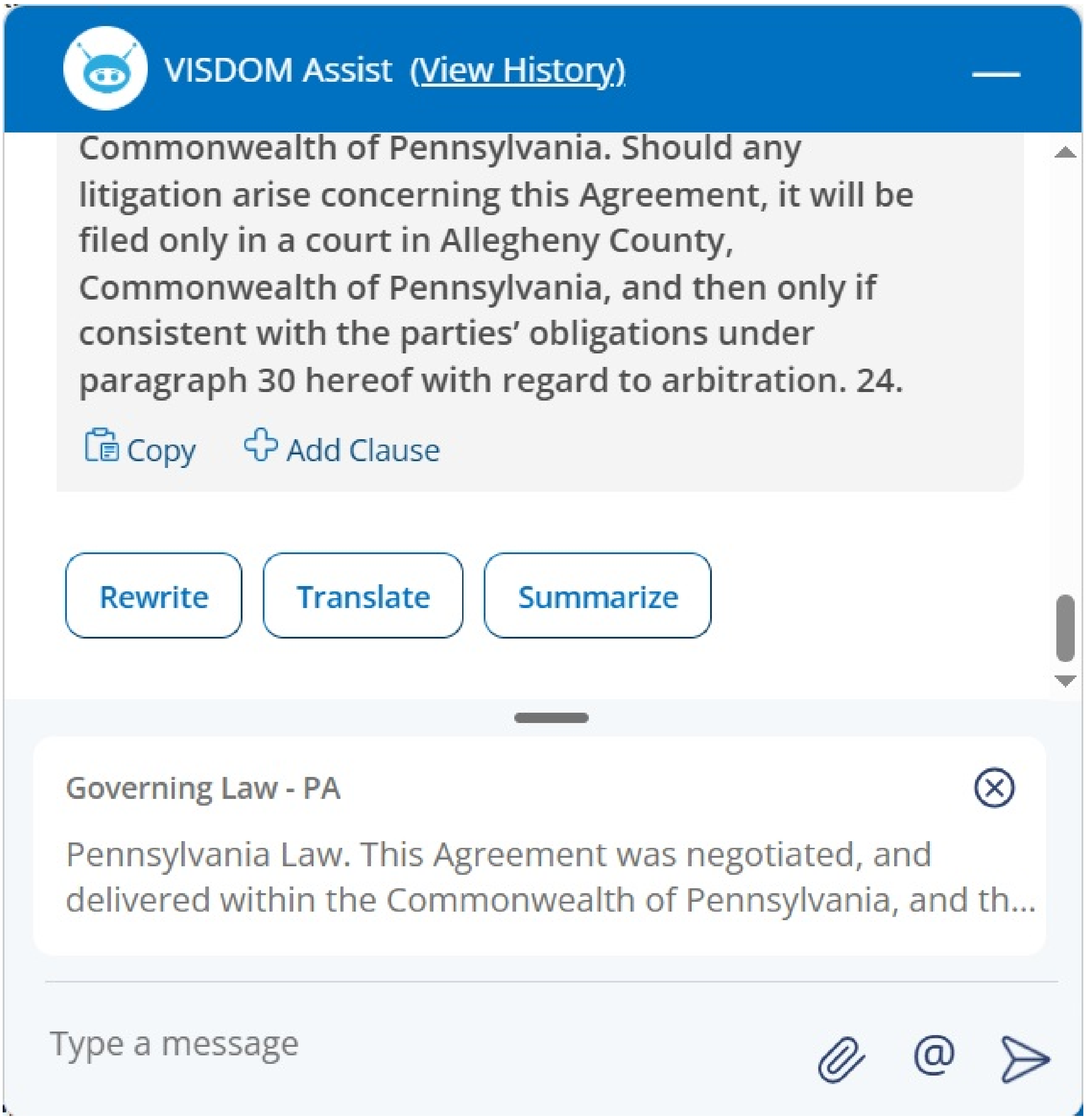
Optional Add-On license that takes VISDOM, our powerful artificial intelligence (AI) backed by machine learning, to the next level with generative AI and other helpful functionality by harnessing OpenAI.

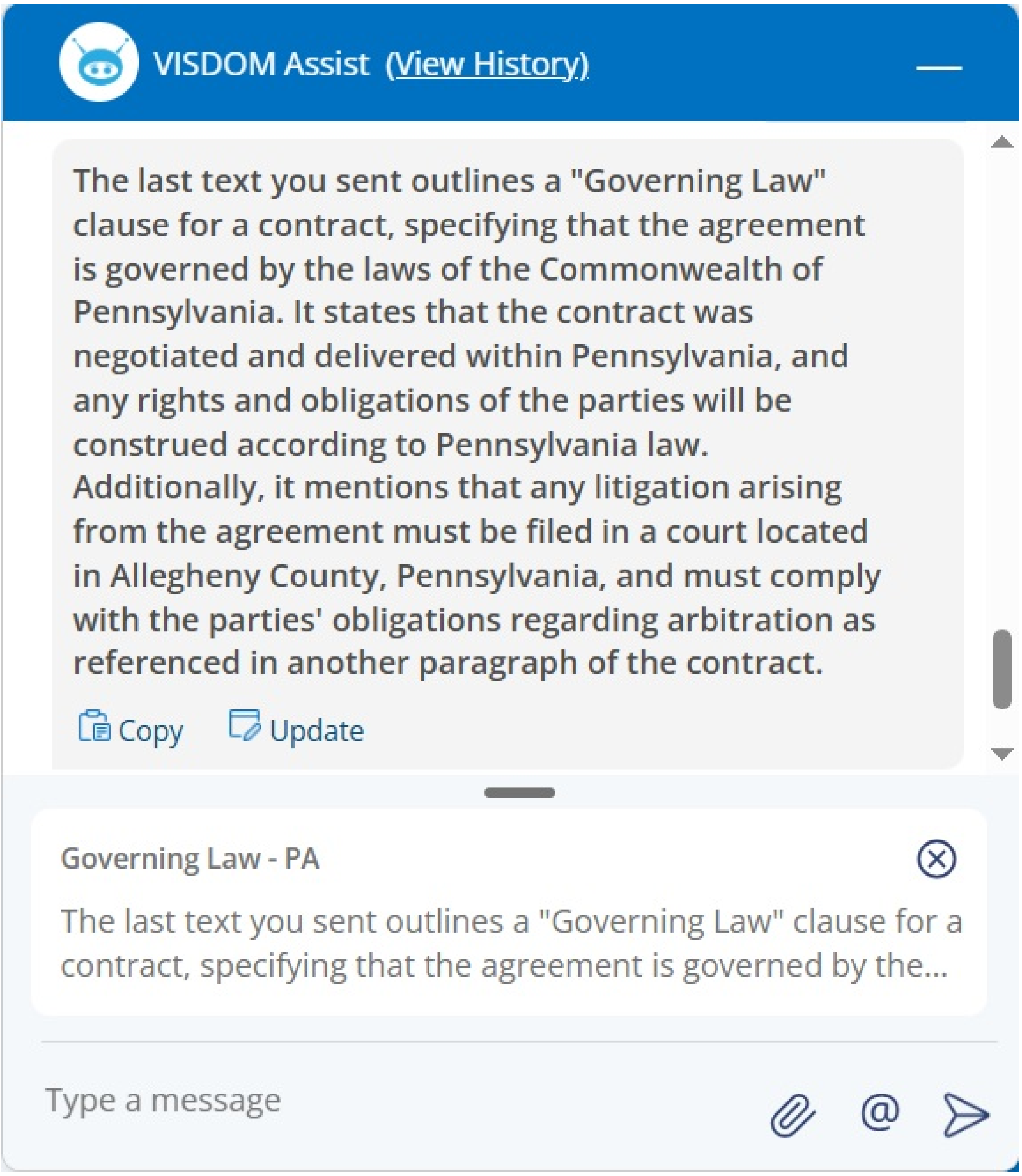
VISDOM+
NEW FEATURES

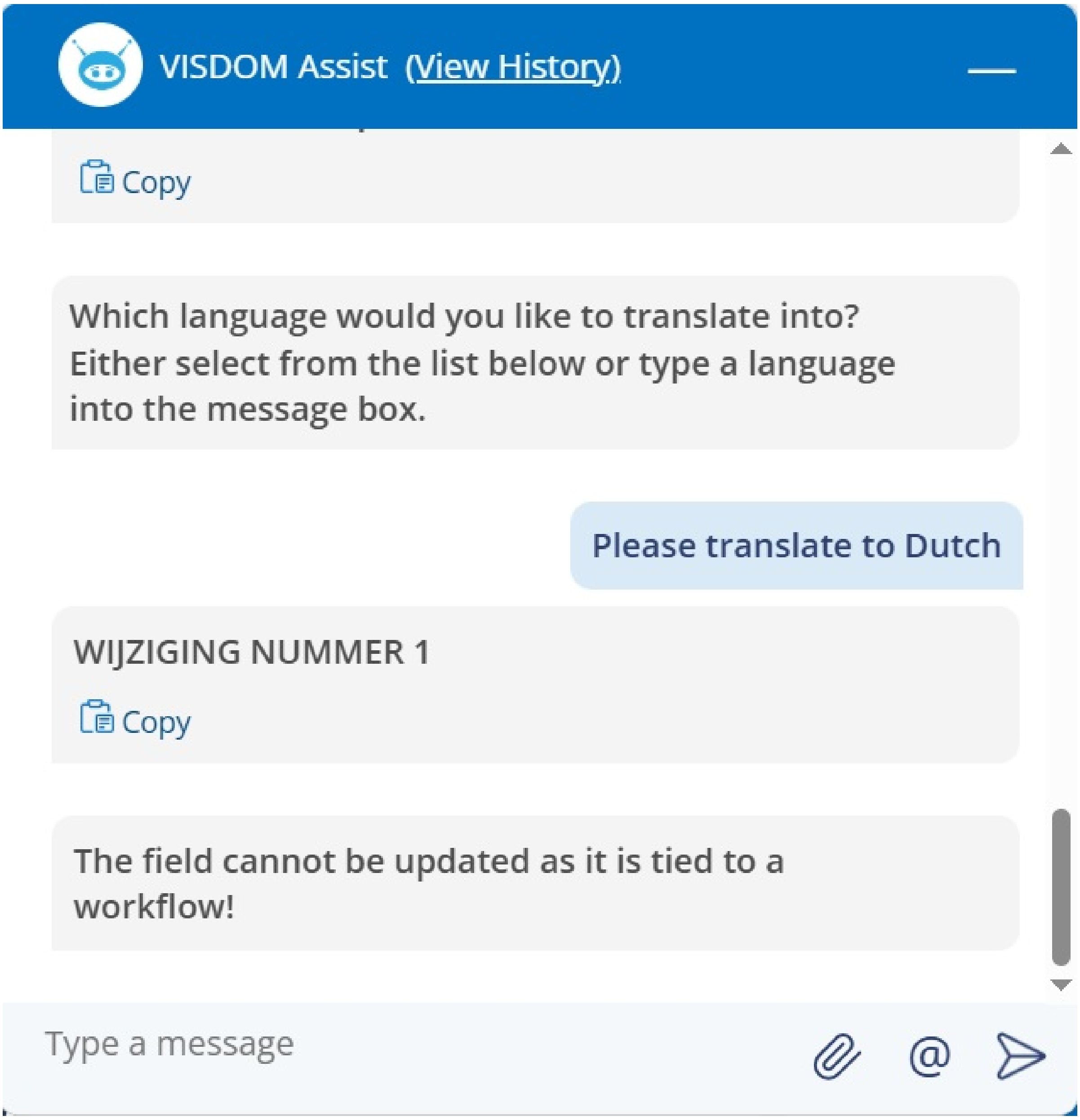
NEW FEATURE: Update Fields From the VISDOM Assist Chatbot

Reference #: 250624.1222.4086

We have added the ability to update fields from a Rewrite, Translation, or Summarizing of a Clause or Field in your system. When you copy a field or a clause to VISDOM Assist, an annotation of the field's name and its data will be displayed within the chatbot. If the field is connected to a workflow, it cannot be updated and will display a validation message alerting the user.


VISDOM Assist (View History)
Commonwealth of Pennsylvania. Should any litigation arise concerning this Agreement, it will be filed only in a court in Allegheny County, Commonwealth of Pennsylvania, and then only if consistent with the parties' obligations under paragraph 30 hereof with regard to arbitration. 24.
Copy
Add Clause
Rewrite
Translate
Summarize
Governing Law - PA
Pennsylvania Law. This Agreement was negotiated, and delivered within the Commonwealth of Pennsylvania, and th...
Type a message


VISDOM Assist (View History)
The last text you sent outlines a "Governing Law" clause for a contract, specifying that the agreement is governed by the laws of the Commonwealth of Pennsylvania. It states that the contract was negotiated and delivered within Pennsylvania, and any rights and obligations of the parties will be construed according to Pennsylvania law. Additionally, it mentions that any litigation arising from the agreement must be filed in a court located in Allegheny County, Pennsylvania, and must comply with the parties' obligations regarding arbitration as referenced in another paragraph of the contract.
Copy
Update
Governing Law - PA
The last text you sent outlines a "Governing Law" clause for a contract, specifying that the agreement is governed by the...
Type a message



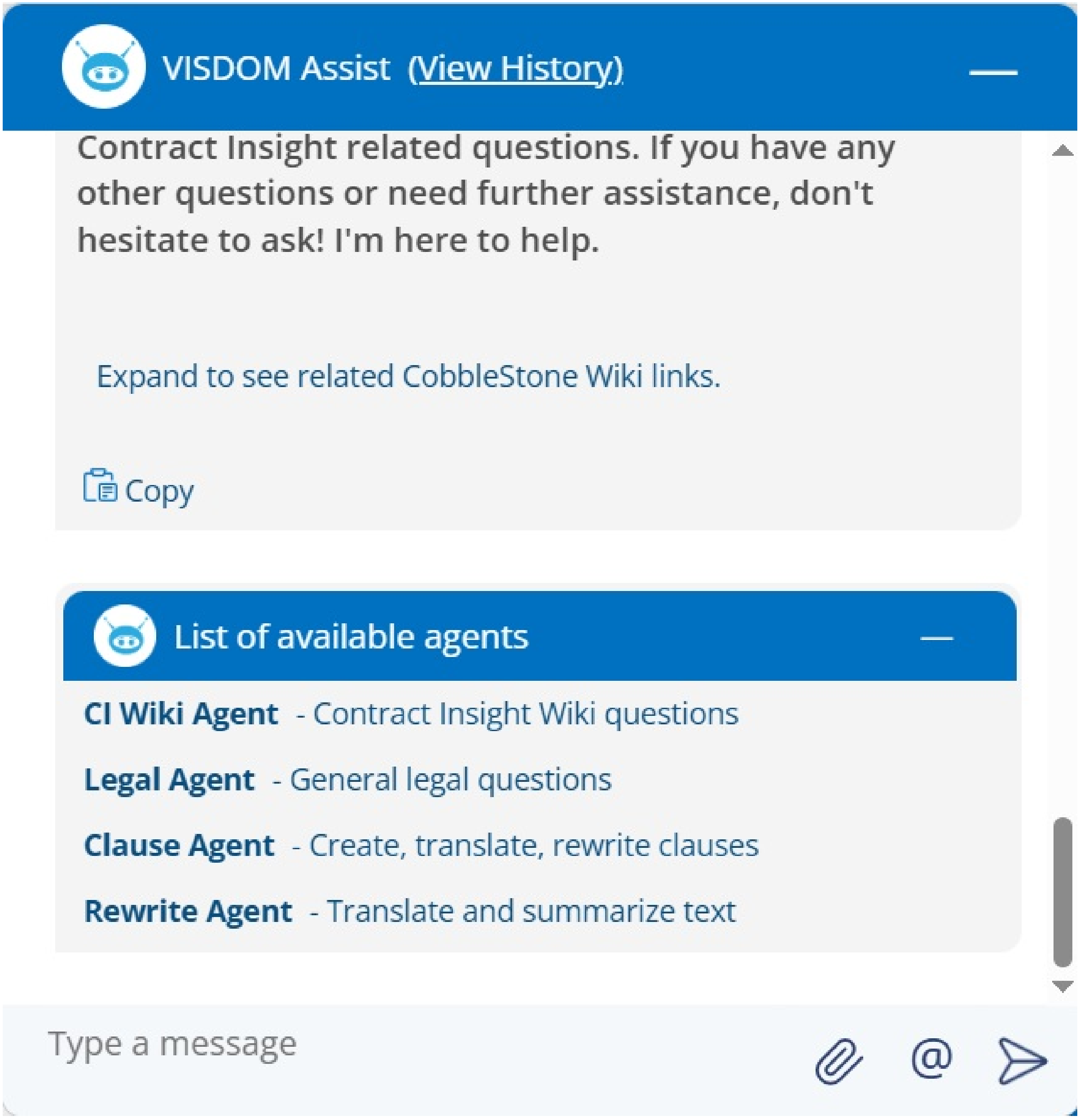
<u>How will this affect users?</u>

Users can now leverage the VISDOM Assist Chatbot to make field updates after using it to rewrite, translate or summarize.

NEW FEATURE: Agentic Chatbot Querying

Reference #: 250624.1086.10539

We have added the ability to select an agent depending on the type of question you would like to ask within VISDOM Assist. Using this approach allows the response time of questions to be considerably faster. To start click the VISDOM Assist button and select the '@' next to the paperclip and send message icons.



Currently available agents offered and descriptions are:

- The **CI Wiki Agent** allows the user to ask questions about the software and it will pull results from the CobbleStone Wiki.
- **Legal Agent** allows the user to ask general legal questions.
- The **Clause Agent** allows the user to Create, Translate, and Rewrite clauses
- The **Rewrite Agent** allows the user to Rewrite and Translate clauses.
- This functionality is enabled for the Internal LLM and the GPT LLM

<u>How will this affect users?</u>

Users can get quicker, more accurate answers and actions out of our chatbot.

VISDOM+ RESOLUTIONS

RESOLUTION: VISDOM+ reloading when attempting to replace clauses

Reference #: 250624.360.12851

When attempting to replace clauses during the Add with VISDOM+ process, users noted the page would reprocess before being able to select clauses to replace. This has been resolved so users can select the appropriate clauses and VISDOM+ only reprocesses once the button to proceed is clicked.

RESOLUTION: Companies added in-line on the VISDOM+ Add screen not showing in dropdown

Reference #: 250624.1278.11224

Users had noticed that when adding Companies inline on the VISDOM+ Add Screen, the new company would not populate in the dropdown. A fix was applied and adding inline via the blue plus should work as expected on VISDOM+ Add.
