CobbleStone Software - Release Notes

Contract Insight Version 22.5.1 Rev 250804

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Patch Overview-Version 22.5.1 (Rev 250804)

Release Version Information

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

Release Version Number	**Client Release Date**	**Release Type *(from prior release)***
22.5.1 (Rev 250804)	04 August 2025	Patch

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For CobbleStone Software version 22.5.1, 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: Vendor/Client Collaboration Gateway
- CobbleStone Add-In: Microsoft Word

Patch 22.5.1 - 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 ENHANCEMENTS

ENHANCEMENT: **Reporting Permission for DB Views**

Reference #: 250804.337.17069

A new permission named *Reports: Prevent Report Creation with DB Views* has been added to Contract Insight. System Administrators can assign this permission to individual users or to a Security Group to prevent users from creating reports using any DB View listed in the Primary Table selection field (e.g. *Contract Spend by Year (DB View)*)

How will this affect users?

End users with this permission assigned will be unable to create reports using the *DB View* Primary Tables in Ad-Hoc Reporting.

ENHANCEMENT: **Prepend Sender's Name to "From" Address**

Reference #: 250804.1259.8297

An enhancement has been added for Alerts emailed from within Contract Insight to include the first and last name of the user initiating the process. This also includes alerts sent for:

- One-off emails
- IntelliApprove
- IntelliSign
- E-Approvals
- E-Signatures

The From address name will now read as: Jane Doe via Contract Insight <alerts@cobblestone.software>

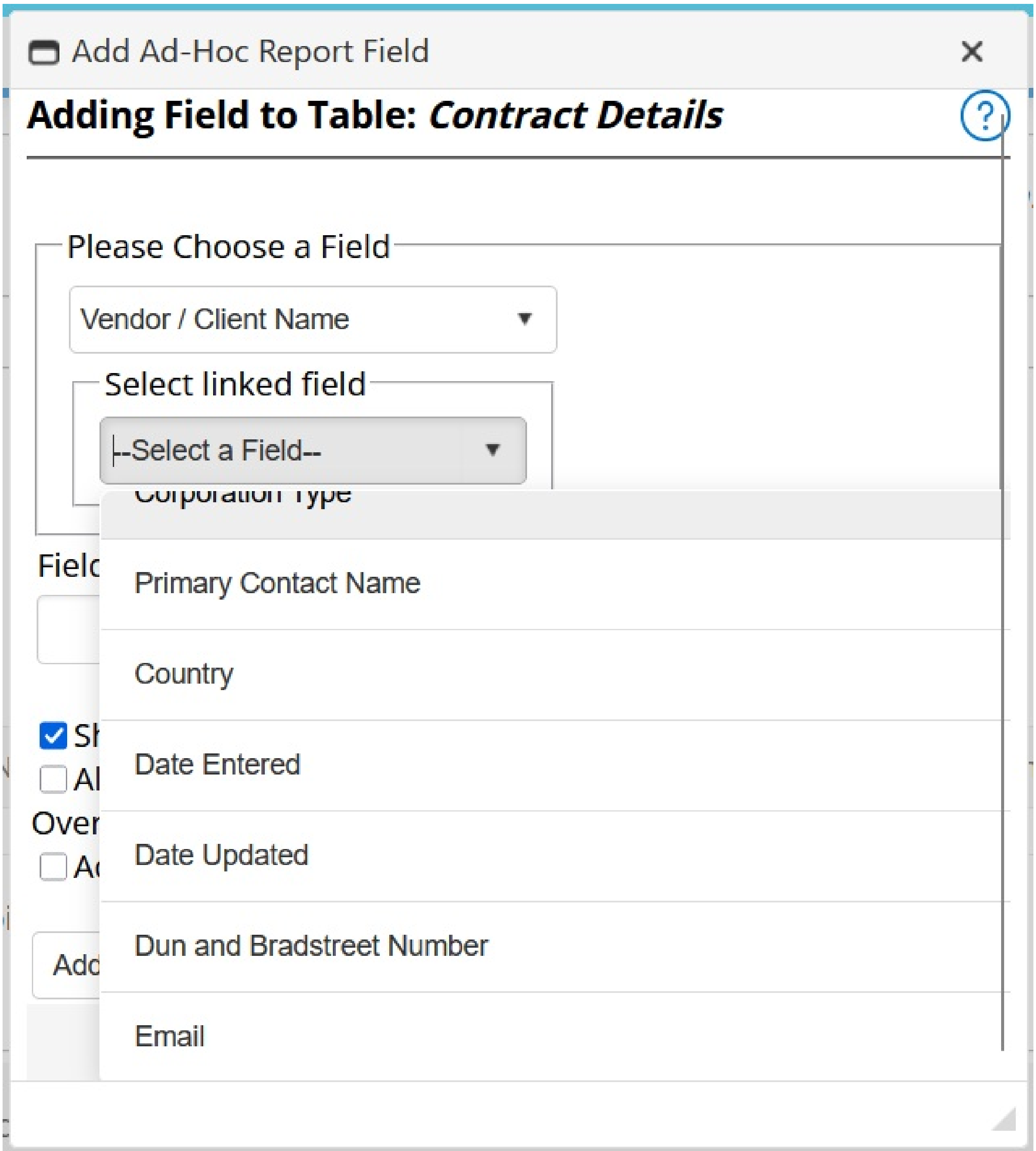
How will this affect users?

End users, Company Contacts, and External Emails receiving an alert from Contract Insight will have a clearer understanding of who initiated the message.

ENHANCEMENT: Ad-Hoc Report Field Selection - Linked Field no longer defaults to first option

Reference #: 250804.1286.574

When adding fields to an Ad-Hoc Report, fields that pull data from a separate table no longer automatically select the first value in the *Select linked field* dropdown. This will prompt the user to select the desired linked field as opposed to defaulting to the first item in the dropdown list.



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

End users creating an Ad-Hoc Report with field linked to other tables in the system will now need to select the appropriate linked field to ensure the desired information is shown.

ENHANCEMENT: **Record Email Enhancements: Alert on Reply and Start New Email Chain**

Reference #: 250804.365.8308

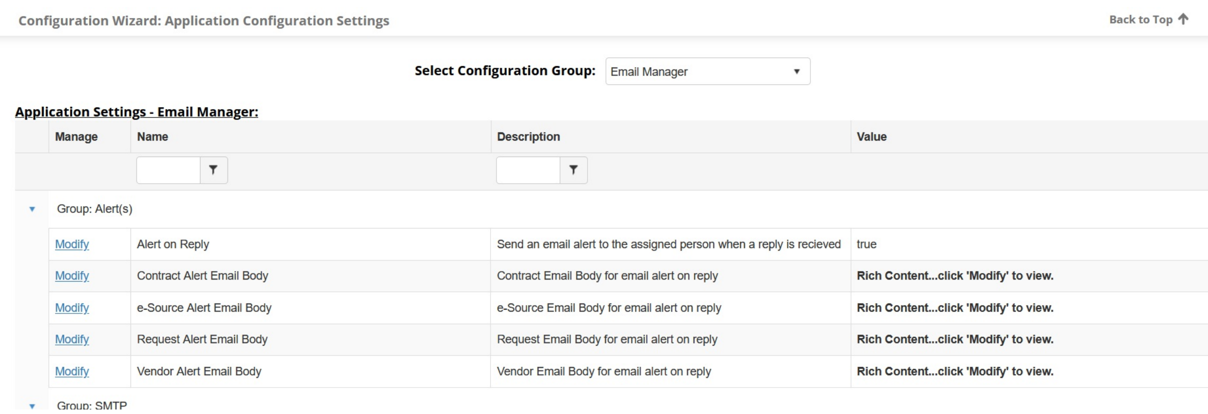
Emails on Request, Contract, Vendor, and E-Sourcing Records have been enhanced to:

- Alert the Employee Assigned when a reply is received
- Allow anyone to start a new Email chain from their email client

<u>*Alert on Reply*</u>

Email Alerts are now sent to the Employee Assigned on the record when a reply is received for an email chain on the record. By default, the Alert on Reply configuration is set to True.

To configure the email body for the individual alerts or to turn off the configuration setting, go to *Manage/Setup > Application Configuration > Config Settings* and choose Email Manager from the Configuration Group dropdown.



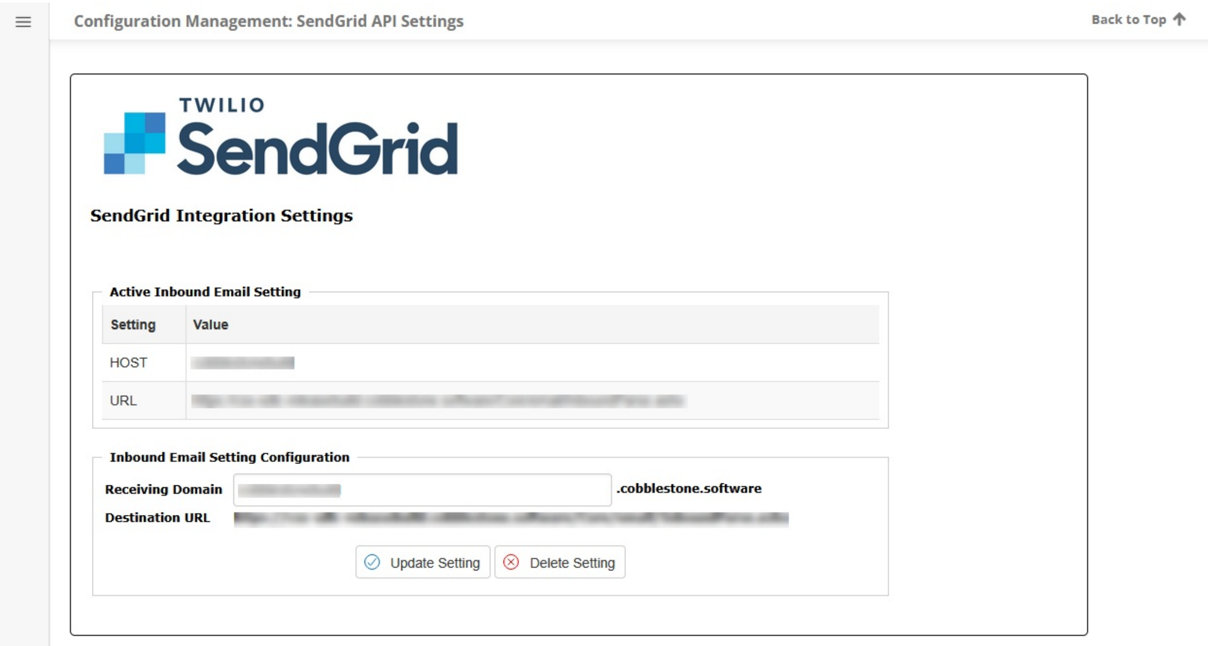
<u>*Start New Email Chain*</u>

Anyone who has an ID for a Request, Contract, Vendor, or E-Sourcing record can now start an new email chain on the record directly from their email client (e.g. Microsoft Outlook). Simply set the To address to one of the following (replacing the *<RECORD ID>* and *<receiving domain>* placeholders):

- Contracts_*<RECORD ID>*@*<receiving domain>*.cobblestone.software
- Requests_*<RECORD ID>*@*<receiving domain>*.cobblestone.software
- Solicitations_*<RECORD ID>*@*<receiving domain>*.cobblestone.software
- Vendors_*<RECORD ID>*@*<receiving domain>*.cobblestone.software

For example:

If unsure of the receiving domain, System Administrators can go to Manage/Setup > Application Configuration > SendGrid API Management:



How will this affect users?

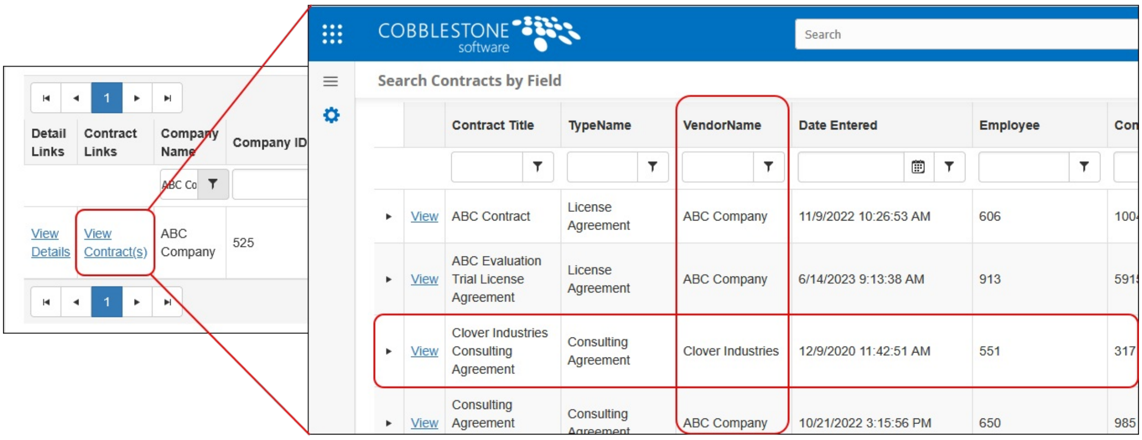
Employees assigned to a Request, Contract, Vendor, or E-Sourcing record can now receive email notifications when a reply is received on a record's email chain. Also, anyone with a record ID for one of those areas and the receiving domain can start a new email chain directly from their preferred email client.

ENHANCEMENT: **Contract with User-Defined Company Field Shows on Vendor Company List/Company Details Screens**

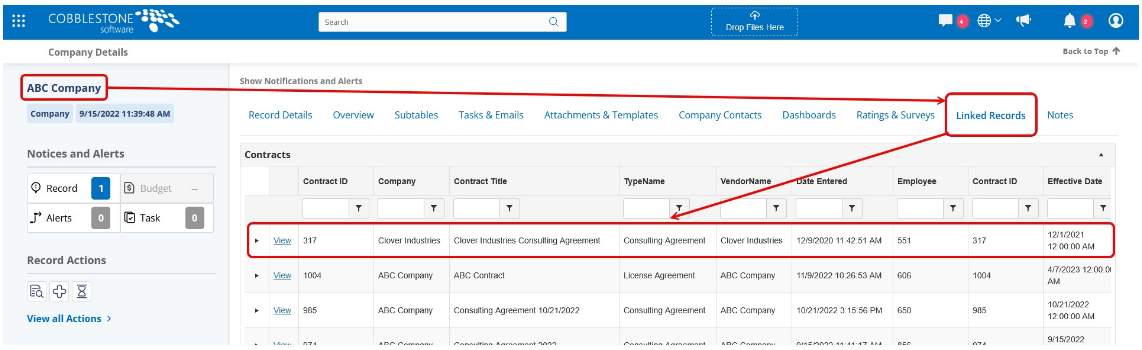
Reference #: 250804.337.9554

Contracts with a user-defined Company field will show on the *View Contracts* search from the **Company List** and the *Linked Records* tab on the **Company Details** page for the Vendor/Company selected in that field on the Contract.

View Contracts from Company List



Linked Records tab on Company Details



How will this affect users?

End users with permission will be able to view Contracts where the Company/Vendor is listed in a user-defined Company field on the Contract record.

ENHANCEMENT: **Company Quick Add Uses *Fields by Type* Setting**

Reference #: 250804.1208.9692

While adding a new Record in the system, users with permission can add a new Vendor/Company in-line without leaving the Add Record screen. This functionality has been enhanced to require the Vendor/Company Type to be selected then will only show the fields configured to show on that selected type.

How will this affect users?

Adding a new Vendor/Company in-line on an Add screen will be less overwhelming by only showing the fields assigned to the selected Vendor/Company Type.

CORE SYSTEM RESOLUTIONS

RESOLUTION: **Sys Admin field locked for Legacy License users**

Reference #: 250804.337.16769

Legacy license users noted that the Sys Admin field on an Employee record was locked, preventing them setting a user as a System Administrator. A fix was applied and the field is no longer locked when creating new employees and can also be edited via the field group.

RESOLUTION: **Online Editor Document permissions saving for all users**

Reference #: 250804.1208.10099

Configuring Permissions in the Online Document Editor for a Record attachment was applying the protection/permissions to all users, not just the selected user(s). The Online Document Editor Permissions are now saving when applying to users, applying users to edit sections of the document, and enforcing via password.

RESOLUTION: **External links in an exported Ad-Hoc report not opening**

Reference #: 250804.1203.12957

After exporting an Ad-Hoc Report to Excel, clicking an external link in that exported report (found in a hyperlink field) would not open. This has been resolved so clicking external links within the exported report will open as expected.

RESOLUTION: **Record Flow Template inconsistent**

Reference #: 250804.1267.13862

Users were finding Record Flow Templates were not reliably triggering on Record Add and Edit. This has been updated to improve record flow performance and consistency.

RESOLUTION: **Mass Upload template ordering fields**

Reference #: 250804.1273.13950

Importing a .csv file to update a subtable was incorrectly ordering the fields. This has been resolved to order the fields by Display Name as it had previously done.

RESOLUTION: **Unable to search by Entered By when linking Contract Records**

Reference #: 250804.1250.14812

Users were unable to link a Contract record by searching the Entered By field. This has been resolved to enable searching by Entered By field as expected.

RESOLUTION: Files/Attachments table not centering after zooming out and zooming back in

Reference #: 250804.386.14954

After zooming out then back in on the Attachments & Templates tab, the Files & Attachments table was not resizing to the dock width. This has been resolved so when zooming the browser in and out it will position correctly.

RESOLUTION: Secure Emails not formatted as expected

Reference #: 250804.1259.14960

Secure Emails were not appearing with the expected format, making user acknowledgement more difficult. This has been resolved and Secure Emails now look and function as expected.

RESOLUTION: Conditional Field not working as intended on Details screens

Reference #: 250804.345.15038

Conditional fields were not showing/hiding as expected on a record's Details screen when the parent field(s) were updated in a specific order. This has been updated so the conditional fields show/hide as expected.

RESOLUTION: Error while searching For Contracts Through Standard Search

Reference #: 250804.1271.15347

Users with their Regional Setting set to English - New Zealand (en-NZ) were unable to use the Standard Search functionality on the Find/Search Contracts page when searching a range between two expiration dates. This has been resolved.

RESOLUTION: Contract changes tabs after saving on sub table

Reference #: 250804.1250.15537

After adding a new subtable entry on the Subtables tab of a Record, users were redirected back to the Details tab instead of remaining on the Subtables tab. This has been updated so when editing, adding, or bulk adding for a subtable, users will be returned to the Subtables tab.

RESOLUTION: Cannot Delete request unless they are Accepted

Reference #: 250804.337.15802

Users found that a Request record could not be deleted until it was in Accepted status. This has been resolved so a Request can be deleted while still in Pending status as expected.

RESOLUTION: Document Comparison Issue

Reference #: 250804.1203.16033

When selecting Edit with VISDOM using the Document Comparison tool, users were seeing a notice stating ***Document Comparison Unavailable***. This has been fixed so users can compare documents using the Edit with VISDOM option.

RESOLUTION: VISDOM spelling error

Reference #: 250804.932.16037

The word 'Entity' was misspelled within the section for editing an algorithm in an existing VISDOM process. This spelling error has been resolved.

RESOLUTION: Conditional fields disappearing on drag and drop with VISDOM basic

Reference #: 250804.1222.17037

On the VISDOM Basic add page, a conditional field disappeared when one parent field matched a condition to show a child field then the user input a value into the child field and then matched a condition for a totally separate conditional field. This has been resolved.

Patch 22.5.1 - 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 ENHANCEMENTS

ENHANCEMENT: **Document Collaboration Templates**

Reference #: 250804.1157.7942

CobbleStone has expanded the Document Templates offered out-of-the-box! The following new Document Templates have been added:

Contracts

- CobbleStone Doc Template - Business Associate Agreement
- CobbleStone Doc Template - NDA
- CobbleStone Doc Template - Termination of Agreement

Counterparty

- CobbleStone Doc Template - Change of Address
- CobbleStone Doc Template - Merger or Acquisition
- CobbleStone Doc Template - Signature Authorization

E-Procurement

- CobbleStone Doc Template - E-Sourcing - Bid Cancel

Prior to initial use, CobbleStone strongly recommends:

1. Reviewing the attachments for each Document Template with your company's appropriate representative/legal team.
2. Updating company-specific information for each attachment.
3. Verifying accuracy of placeholders within each attachment. Placeholders are set using out-of-the-box fields available on new system configuration and may not be appropriate for your company's specific configuration of Contract Insight.

How will this affect users?

End users with permission to manage/use Document Templates will have a starting point for some common document processes.

DOCUMENT COLLABORATION & E-SIGNATURE RESOLUTIONS

RESOLUTION: **Unable to replace signatories in an Active Signature Process**

Reference #: 250804.1157.12627

Users were unable to replace signers from the *Document Process Manager: Signature Process Dashboard*. This issue has been resolved and signers can be replaced as designed.

RESOLUTION: **IntelliSign signature formatting is inconsistent**

Reference #: 250804.345.14058

Some users were experiencing inconsistent formatting of the signature attached during the IntellSign Now and IntelliSign E-Sign processes. Adjustments have been made to the signature orientation to resolve this issue and ensure proper signature placement.

RESOLUTION: **Document Template for Requests cannot be merged under a specific scenario**

Reference #: 250804.1157.16756

A Document Template created for the Requests *Template Area* with the Request Task Details subtable added were not mergeable onto a record if Employee Details fields were also added to the template. This has been resolved and the template under this scenario can be merged as expected.

Patch 22.5.1 - 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 ENHANCEMENTS

ENHANCEMENT: **Dynamic Translation of Field Groups and Field Names**

Reference #: 250804.1203.15760

Translations on the Vendor/Client Gateway have been enhanced to include translation of Field Groups and Field Names. The preferred language can be selected by clicking the globe icon in the header or by setting the Customer Contact's Regional Setting value.

How will this affect users?

Users of the Vendor/Client Gateway will now see Field Groups and Field Names translated when choosing a preferred language.

ENHANCEMENT: **Updated Secure Email Page Design**

Reference #: 250804.1203.16469

The design of the Secure Email page has been updated to match the design changes throughout the Vendor/Client Gateway.

How will this affect users?

Users of the Vendor/Client Gateway will see and updated design for Secure Email

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VENDOR/CLIENT COLLABORATION GATEWAY RESOLUTIONS

RESOLUTION: **Unable to create Request from Contract**

Reference #: 250804.1203.15545

Users were previously unable to submit Requests directly from the Vendor Collaboration Gateway (VCG). This fix enables seamless Request creation from within the VCG interface, improving usability and contract management workflows.

RESOLUTION: **Sign In field order flipped**

Reference #: 250804.1288.15548

On the Vendor/Client Gateway (VCG) Welcome page, the Company ID field was incorrectly appearing before the Password field, disrupting the expected login flow. The field order on the VCG Welcome page has been corrected to follow the intended sequence:

- Username
- Password
- Company ID

RESOLUTION: **Long titles on dropdowns causes overlapping**

Reference #: 250804.1203.15553

Dropdown fields with long field names were overlapping the values for the field. This has been resolved by truncating the name of long fields and showing the full name in the tooltip.

RESOLUTION: **All surveys show on E-Sourcing records**

Reference #: 250804.1203.15554

All surveys were displaying on the E-Sourcing records whether it was assigned to the specific record or not. This has been fixed so that only the appropriately assigned surveys show as expected.

RESOLUTION: **Horizontal scroll aligned right**

Reference #: 250804.1203.15615

When the Vertical Scroll position in the Core system is set to left, the horizontal scroll for grids on the Vendor/Client Gateway are starting aligned/scrolled to the right. This has been adjusted so the grid is aligned left as expected.

RESOLUTION: Internal files appearing on a the Contract Search grid

Reference #: 250804.1203.15633

Files/Attachments on a Contract that were marked as an Internal file type in the Core system were showing on the Contract Search grid on the Vendor/Client Gateway. This has been resolved so only files with a type of Gateway or Public are available on the Vendor/Client Gateway as expected.

RESOLUTION: Contract and E-Sourcing grids defaulting to show Public records for logged in users

Reference #: 250804.1203.15827

After logging in and going to either Contracts or E-Sourcing, users were directed to the list of public records for the specified area. This has been updated to initially direct a logged in user to the My Contracts or My E-Sourcing list.

RESOLUTION: VCG Note and Rich Text control overlaps input

Reference #: 250804.1203.15829

The Note and Rich Text field formatting section of the field was overlapping the data input area, making it difficult to read the first line of entered text. This has been adjusted to allow for additional space between the field formatting section and data input area of the field.

RESOLUTION: Submit Request only showing public Request Type option

Reference #: 250804.1203.15882

Users logged into the Vendor/Client Gateway were only presented with public Request Types when clicking on the Submit Request button. This has been fixed so the configured Request Types for logged in users appear.

Patch 22.5.1 - CobbleStone Add-In: Microsoft Word

Optional CobbleStone Add-In for Microsoft Word improves workflow and integration between Contract Insight and Microsoft Word. This add-in is available for use in both application-level versions of Word (Word Desktop App) and browser-level versions (Word Online).

COBBLESTONE ADD-IN FOR MICROSOFT WORD NEW FEATURES

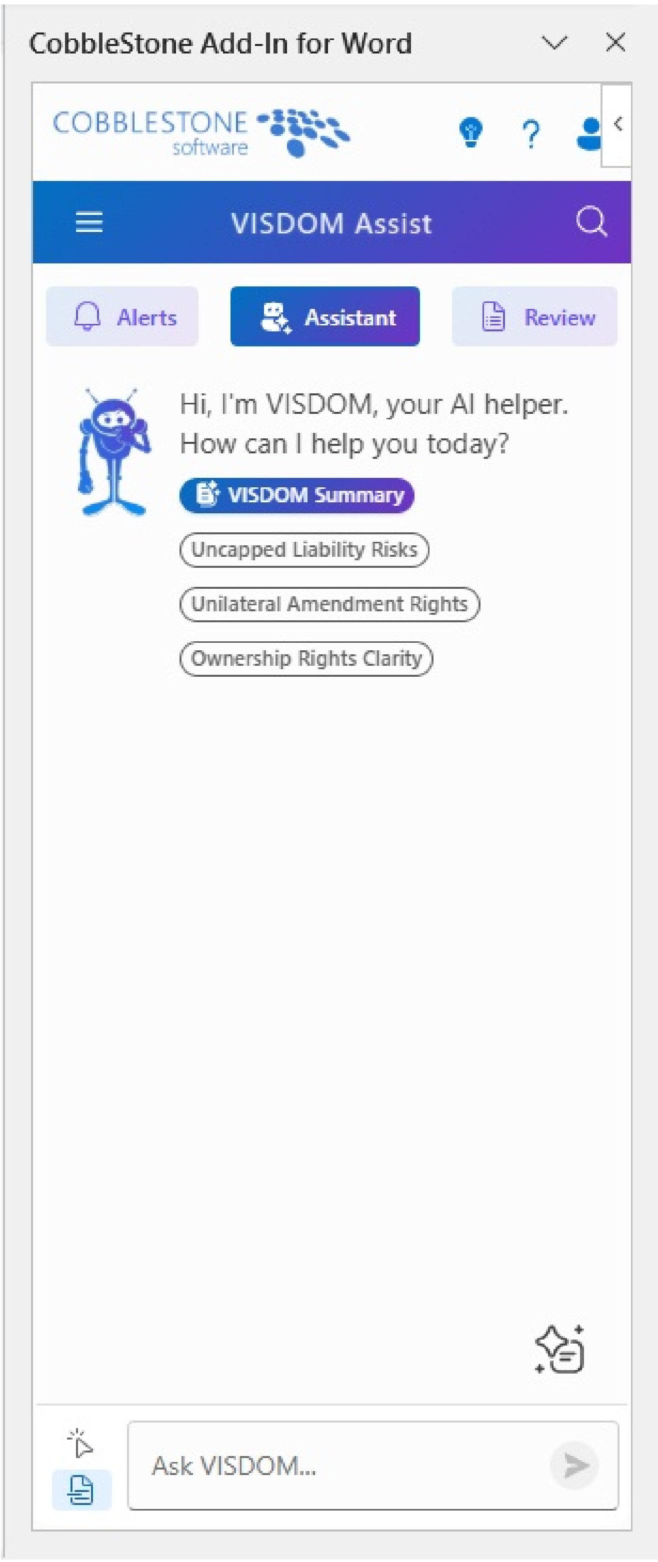
NEW FEATURE: VISDOM Assist Chatbot Integration in CobbleStone Add-In for Word

Reference #: 250804.1237.5805

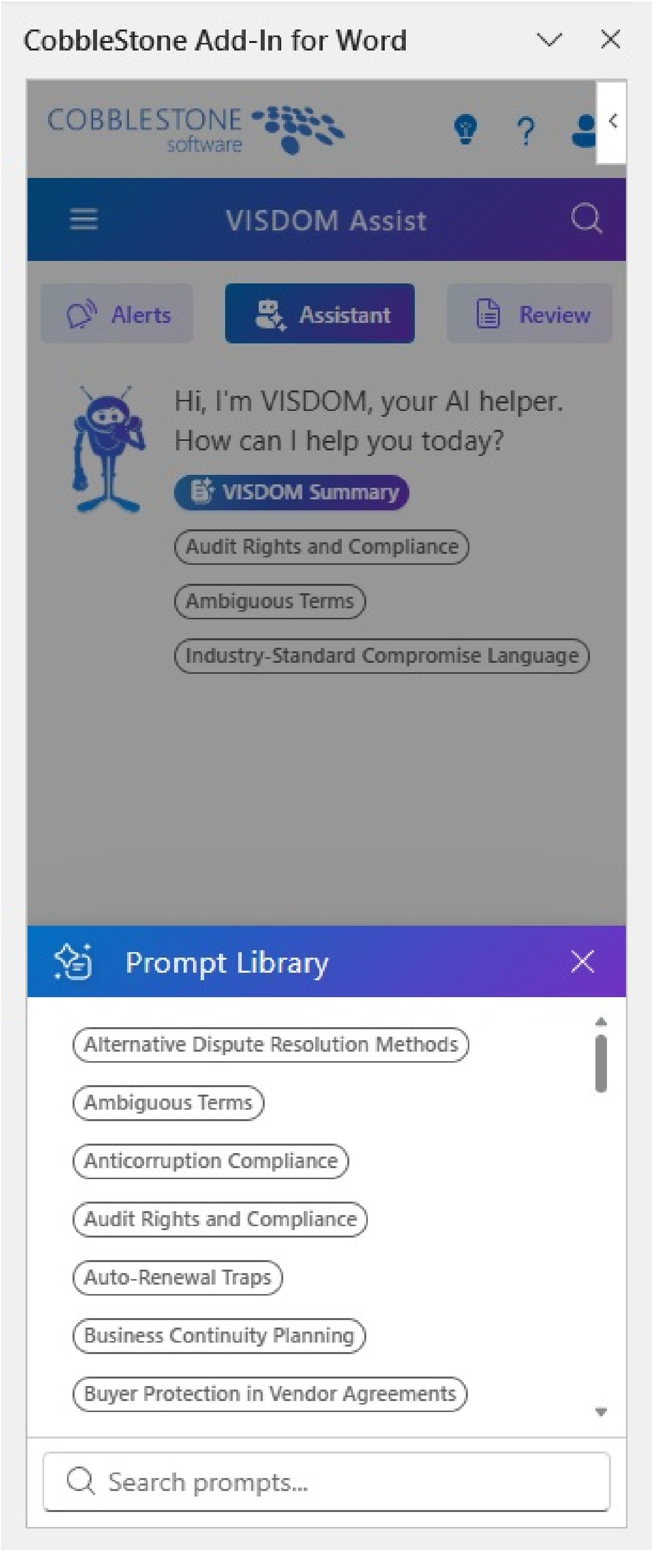
The VISDOM Chatbot has been integrated into the CobbleStone Add-In for Word, bringing intelligent document analysis and assistance directly into your workflow.

Assistant Tab

The new Assistant tab provides access to the VISDOM Chatbot, which leverages a large language model (LLM) to analyze your document and respond to queries. You can ask questions about the software or request legal insights based on your document's content.



A set of predefined prompts is available to help guide your interactions and streamline common tasks.



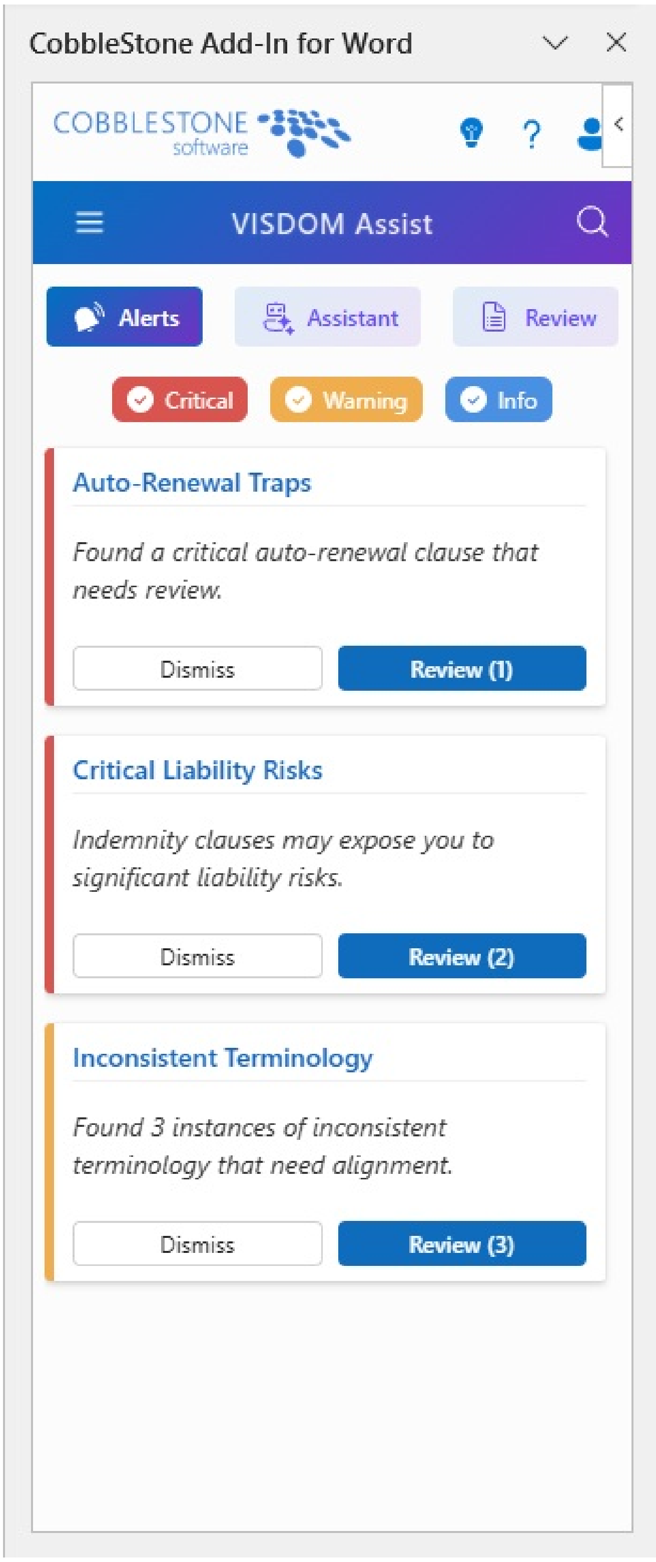
Users can also highlight text within their document and ask the chatbot to:

- Translate
- Summarize
- Rewrite

These features mirror existing functionality in Core, now available directly within Word.

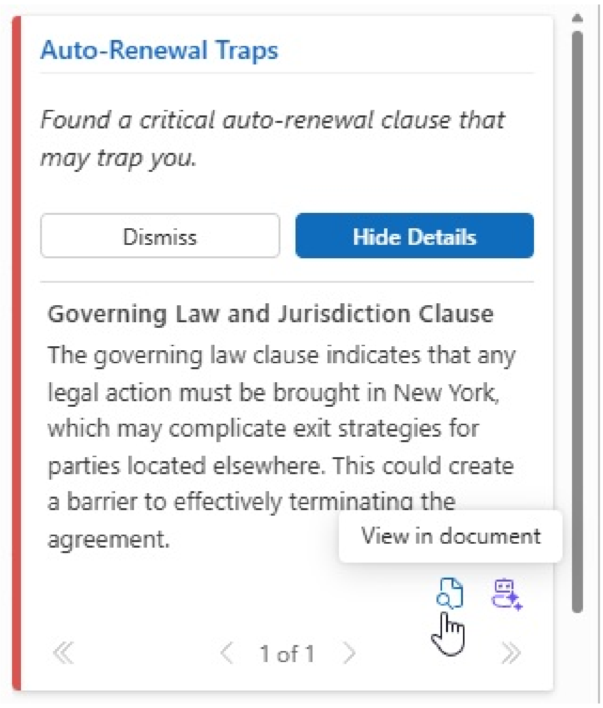
Alerts Tab

Enable Critical, Warning, and Info alerts to continuously scan your document.

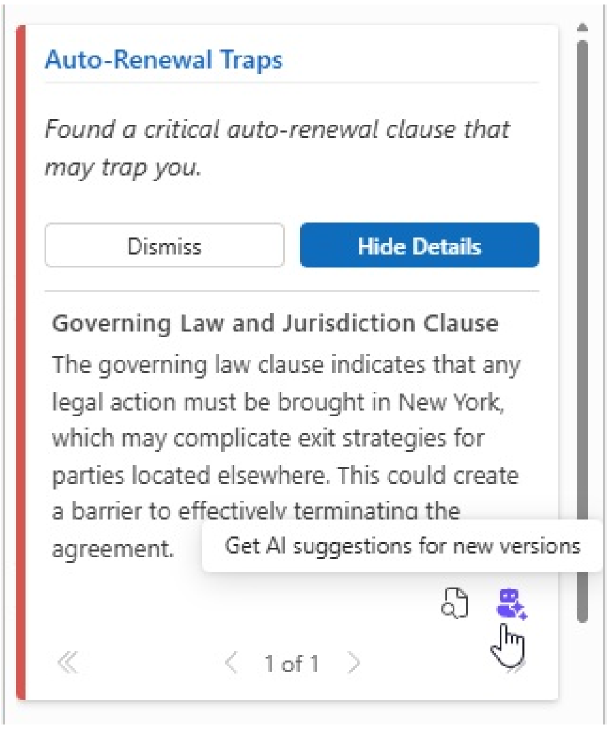


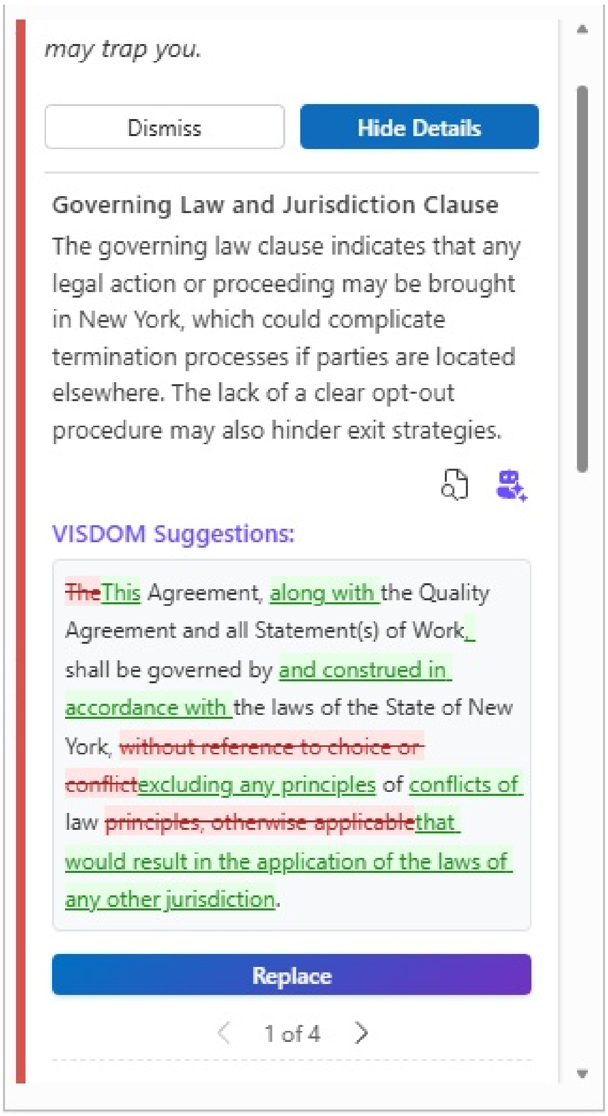
Findings are queued in the Alerts tab, where you can:

- Click View In Document icon to locate the issue in your document
  -



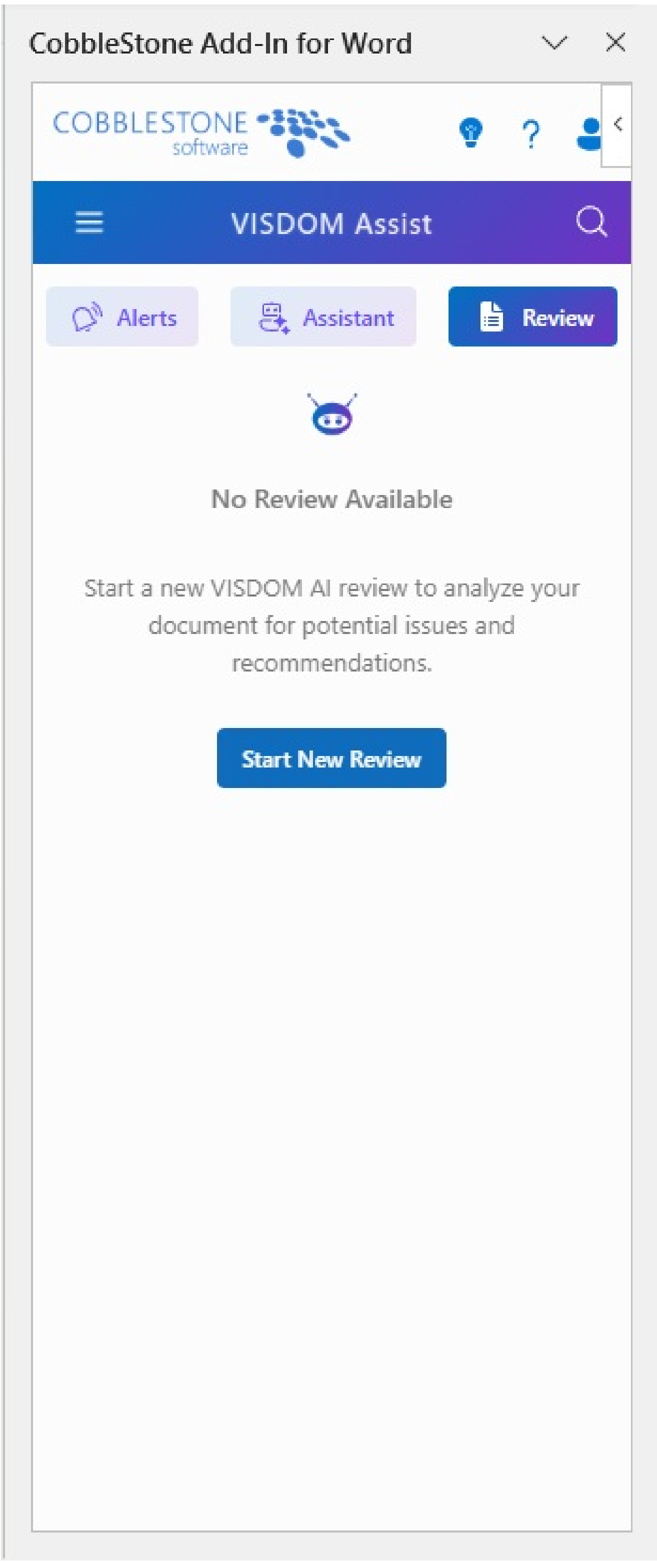
- Use the chatbot for additional suggestions
  -

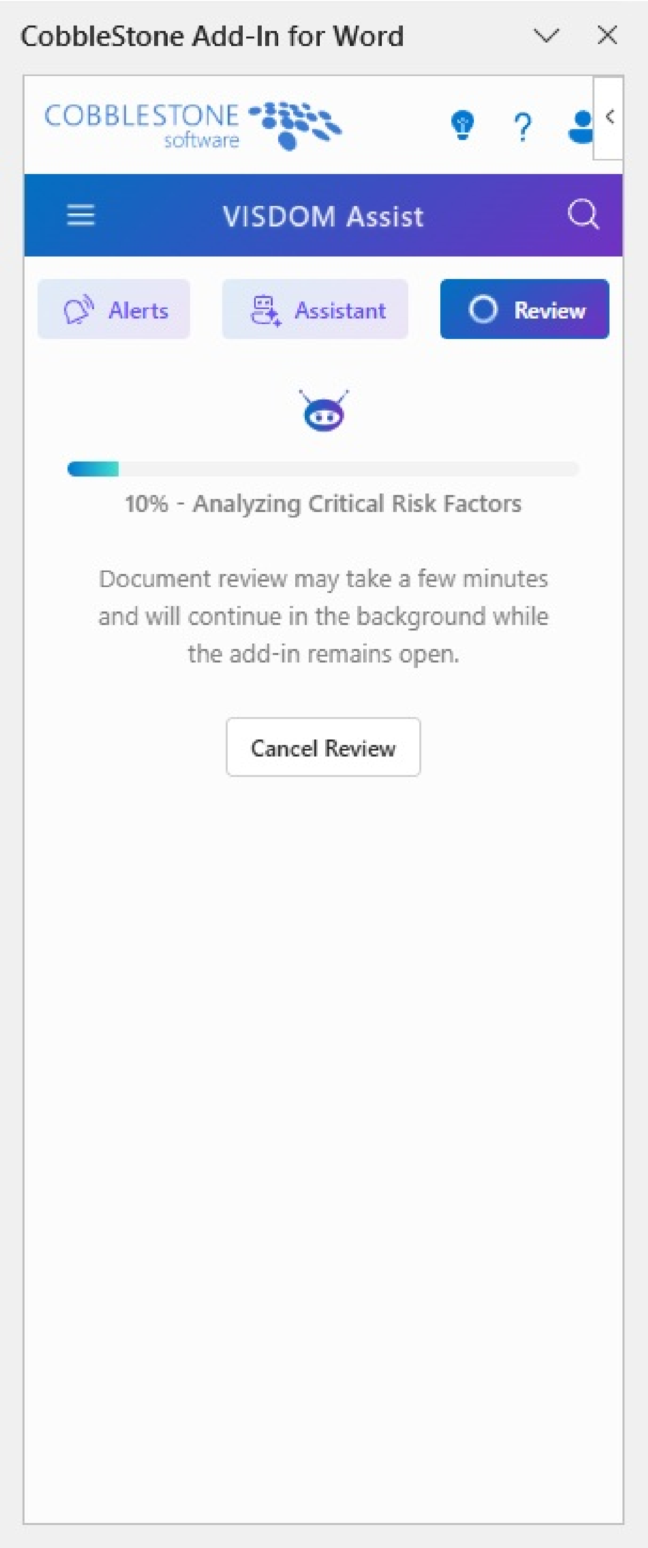




Review Tab

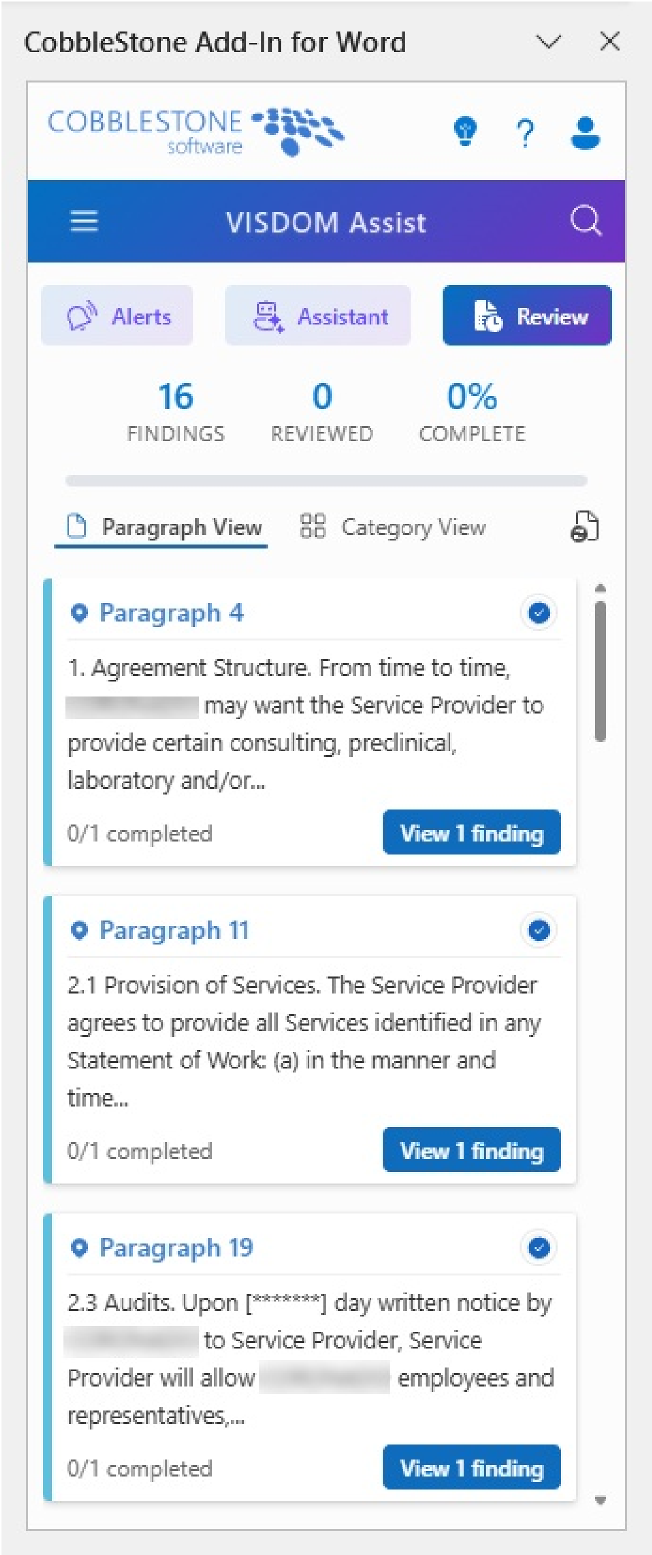
Initiate a comprehensive document review for deeper analysis. This process may take several minutes and provides detailed insights to enhance document quality.


CobbleStone Add-In for Word
COBBLESTONE software
VISDOM Assist
Alerts
Assistant
Review
No Review Available
Start a new VISDOM AI review to analyze your document for potential issues and recommendations.
Start New Review

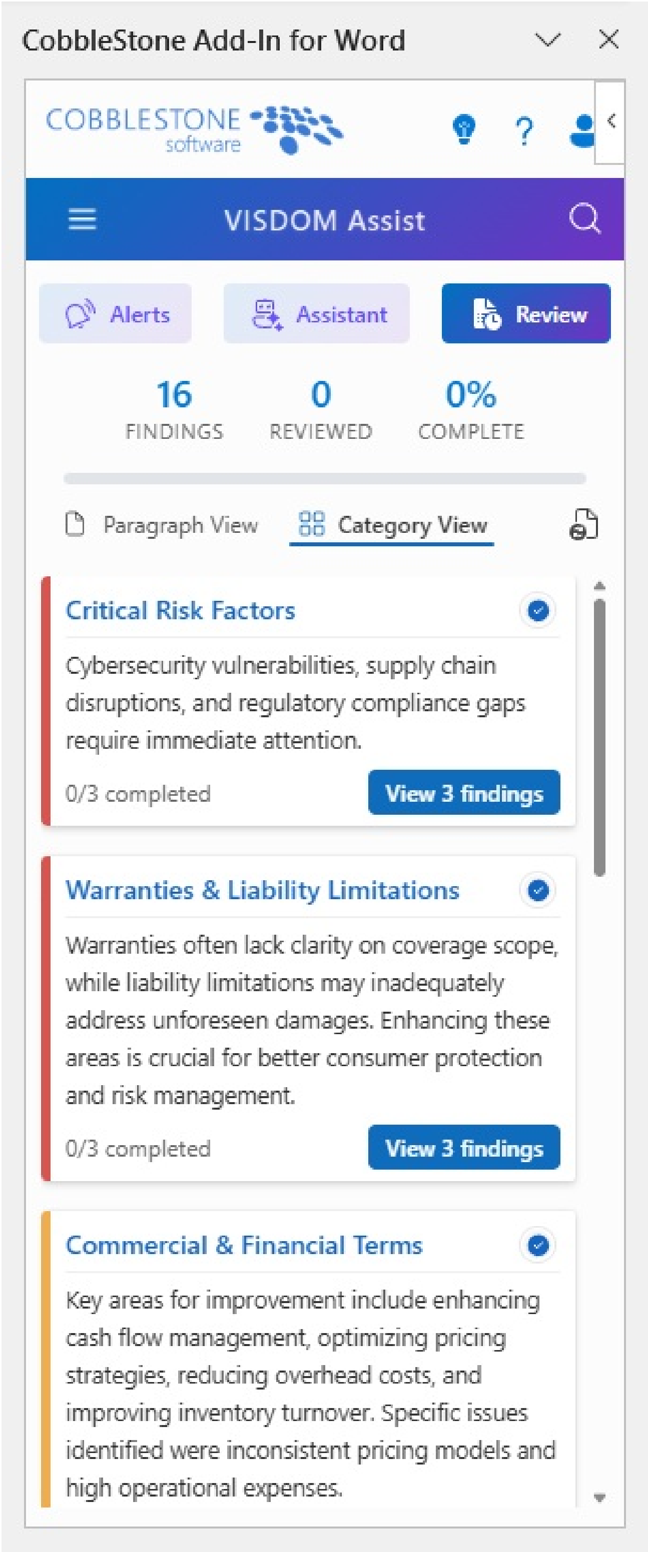


Review results are available in two formats:

- Paragraph View: Displays findings by paragraph, with options to view, revise, or mark as reviewed.
    -



- Category View: Organizes findings by type (e.g., Contract Structure & Completeness) for a thematic overview of document issues.
    -



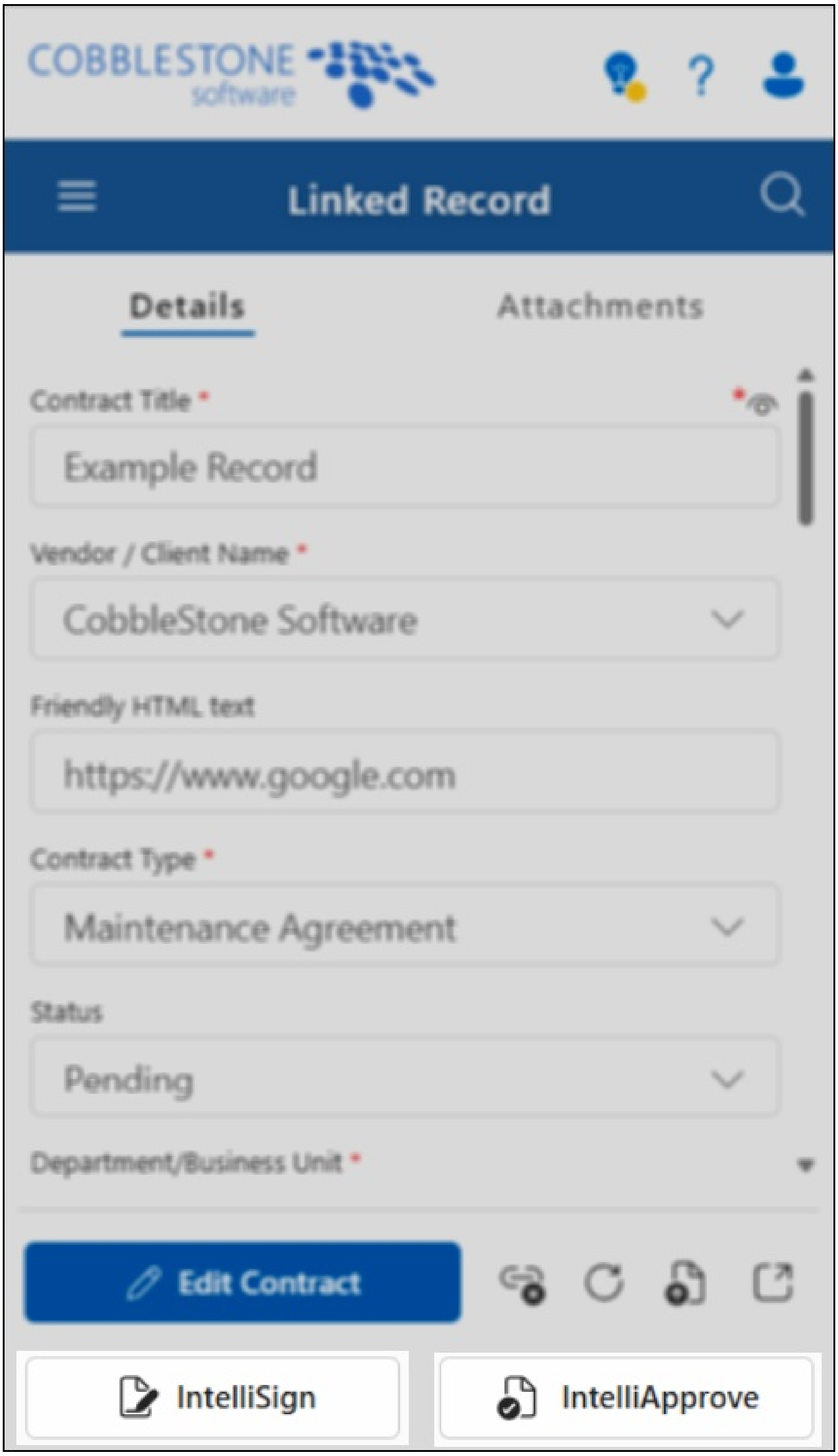
Like the Alerts tab, users can click the *View in document* icon to find the text within the document or click the Chatbot icon for additional suggestions.

NEW FEATURE: Send Document for IntelliApprove/IntelliSign

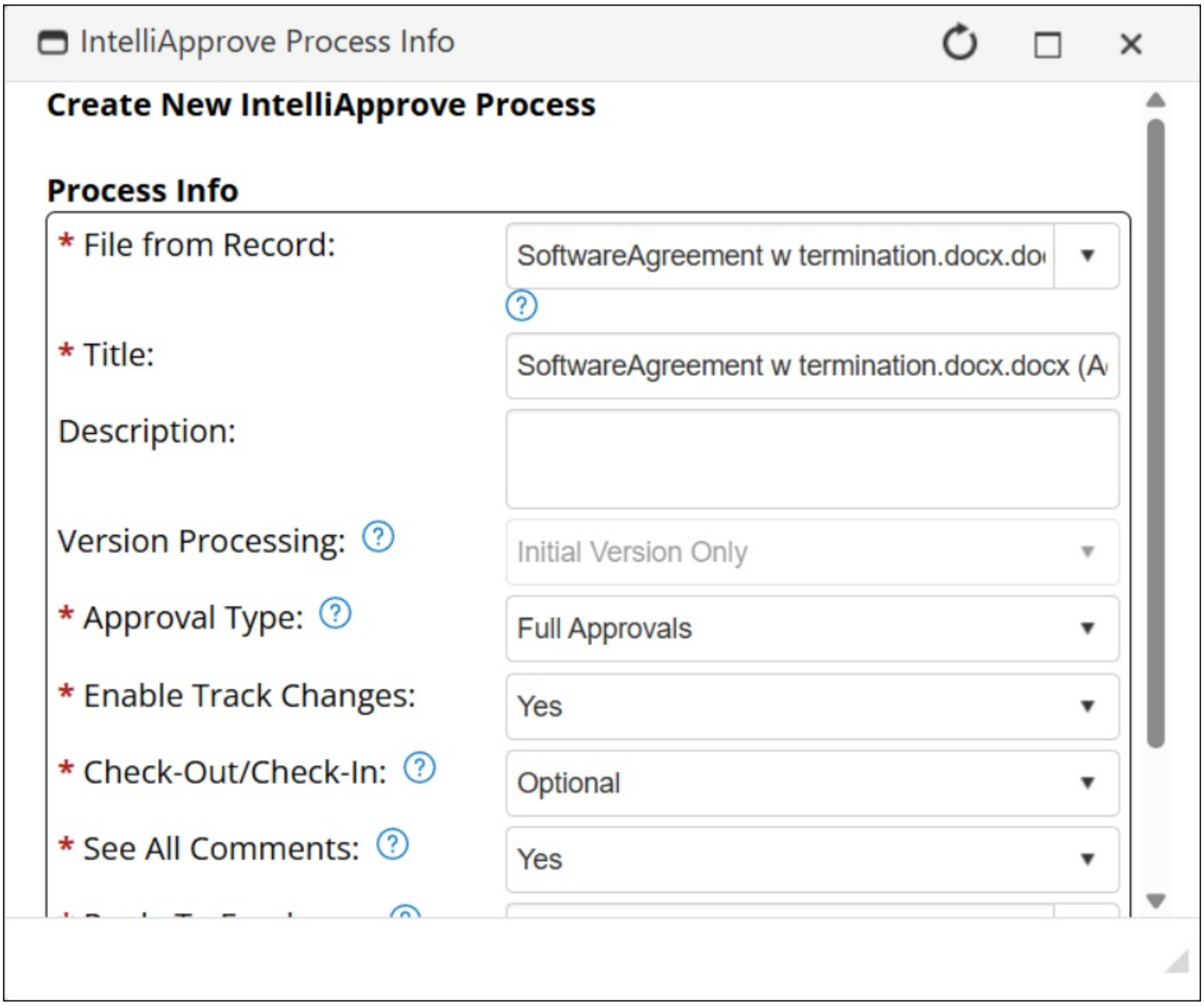
Reference #: 250804.1231.386

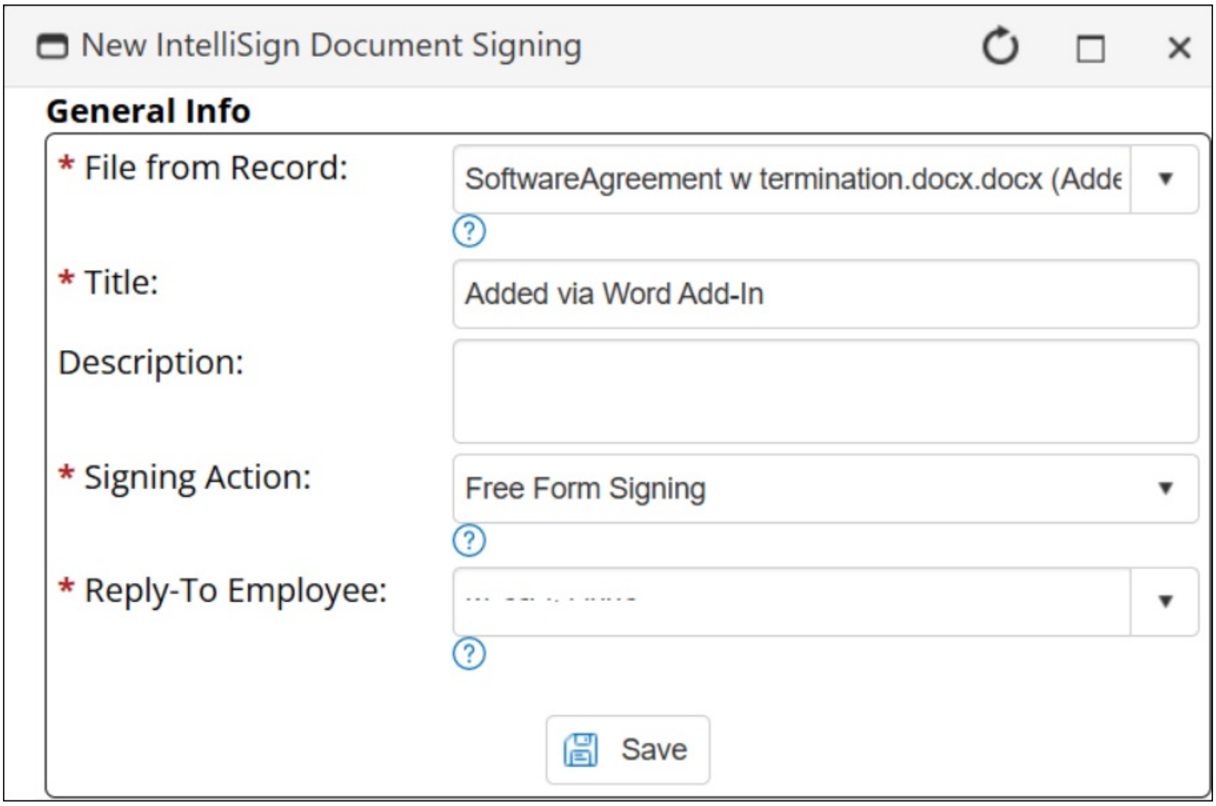
If Document Authoring is licensed, users with permission can now start an IntelliApprove or IntelliSign process for a linked record directly from the CobbleStone Add-In for Word.

When viewing the linked record through the Add-In, new IntelliSign and IntelliApprove buttons are available at the bottom of the record.



Clicking these options directs the user to Contract Insight and displays the respective window for starting the Signature or Approval process with the file.


IntelliApprove Process Info
Create New IntelliApprove Process
Process Info
* File from Record:
SoftwareAgreement w termination.docx.do
* Title:
SoftwareAgreement w termination.docx.docx (A
Description:
Version Processing:
Initial Version Only
* Approval Type:
Full Approvals
* Enable Track Changes:
Yes
* Check-Out/Check-In:
Optional
* See All Comments:
Yes


New IntelliSign Document Signing
General Info
* File from Record:
SoftwareAgreement w termination.docx.docx (Adde
* Title:
Added via Word Add-In
Description:
* Signing Action:
Free Form Signing
* Reply-To Employee:
Save

How will this affect users?

Users with permission will be able to start an IntelliApprove or IntelliSign process directly from the Add-In for Word.

COBBLESTONE ADD-IN FOR MICROSOFT WORD ENHANCEMENTS

ENHANCEMENT: **Enable Conditional Fields**

Reference #: 250804.1237.9161

Conditional fields are now showing/hiding on the Create Record screens in the CobbleStone Add-In for Microsoft Word. This mirrors how the fields are configured in the Core system.

How will this affect users?

If conditional fields are configured, end users will only see the field when the conditions are met.
