

## Overview - Contract Insight Enterprise Edition

**CobbleStone Systems** is a world-wide leader in providing Contract Management Software Products. Contract Insight Enterprise Contract Management Software, by CobbleStone Systems is used by many fortune 500 companies around the globe. CobbleStone Systems has been providing contract management software solutions since 1995 and has years of client feedback and industry knowledge.

**Contract Insight Enterprise, by CobbleStone Systems**, is an “End-to-End” enterprise level, completely web-enabled Contract Management Software Solution which provides enterprise contract tracking, contract drafting, unlimited custom user-defined fields, custom report design and generation tools, e-mail alerts, calendar reminders, task schedules and checklists, security, document capture and management, check in tracking, workflow, financials, cost control, searching, performance tracking, full text indexing, web platform, web calendaring, and more. It is built upon the latest web-enabled technologies so it can be deployed faster, supported easier, reduce your total cost of ownership and accelerate your return on investment.

**CobbleStone Systems** is committed to providing the best value Enterprise Contract Management (ECM) Solution in the industry.

Some of the **Features and Benefits** provided by Contract Insight Enterprise:

- Manage any type of contract, agreements, patents, material transfer agreements, intellectual property agreements, software license agreements, leases, and licenses including revenue contracts, expense contracts, master/sub contracts, milestones, action items and more
- Create/draft contracts from contract templates with field merging that is reusable for ease-of-use
- Quickly Create and Access Contracts from a web browser or web enabled phone
- Track documents, images, files, e-mails, faxes, voice mail, PDF, Excel, Word, and any other files
- Link and Associate Contracts together for master and sub-contracts
- Track Contracts according to your standard codes, categories, status, departments, locations, and more
- Track Contract's physical location, amendments, notes, changes, and more
- Track Contract Work Flow, approval status, and performance
- Easily renew contracts with a click of the mouse and link to previous versions to retain history
- Provides e-mail notifications for contracts, tasks, milestones, action items, and payments
- Manage complex and/or simple workflow; users are kept up-to-date via our advanced notification system; automatic reminders are sent to key stakeholders; assign employee responsibility to track workflow; with escalation/delegation

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- Track payments and payment notifications; receive budget and cost alerts for financial control
- Create simple task alerts with e-mail directly to MS Outlook/Exchange, Lotus Notes and all SMTP e-mail systems
- Create pre-defined and global tasks by Contract Type, Department, Status, Amount, and any field
- Track Checklists and Milestones
- Calendaring integrated with contract notifications; exporting of Calendar to MS Outlook and of vCalendaring systems
- Create any type of field using easy-to-use User-Defined Fields (with friendly names, field order, and help text)
- Create and assign fields by contract type
- Report /search on any field via ad-hoc searching, save searches, export to Excel and other formats, create reports with Report Builder; with scheduled e-mailed reports
- Manage compliance and vendor performance
- Offers granular security for user, department, with add/read/modify permissions; plus full audit trails/change tracking
- Import/Export data and integrate with common ODBC compliant databases and third party systems
- Online user manuals, demos, video tutorials, and help system
- Take advantage of CobbleStone's **concurrent** user license model and get rid of named license fees & management

### Flexible, Scalable, Extensible Architecture

Contract Insight Enterprise, is built on the Microsoft .Net platform, and utilizes the .Net 2.0 framework as well as IIS version 5 or later and MS SQL Server 2000 or later. Contract Insight is built upon Microsoft's Nth tier web architecture. From a server standpoint and when hosted in our client's datacenter: The server requirements are: Windows 2000, or 2003, or 2008 Server; MS SQL 2000, or 2005, or 2008 database. Contract Insight supports single server to multi server for load balancing, virtualization, caching, and it supports Windows OS load balancing for the IIS application and MS SQL Cluster for the SQL server. The database and application are segregated into the application layer and the data layer. The Database can run on the same server as the IIS application or they can run on a separate database server and application server.

Contract Insight Enterprise includes web services api for firewall-friendly integration and can be integrated at the MS SQL Database level; system is built on principles that allow us to extend the functionality of the system to any 3<sup>rd</sup> party software. The system is built upon open standards to allow integration with other systems via data direct, ODBC, web services, APIs, and custom scripting. Contract Insight is built upon MS SQL Server database and offers open database connectivity to allow third party reporting tools to query and report off of the system.



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### **Thousands of simultaneous users**

Contract Insight Enterprise has been application tested for thousands of simultaneous users and only limited by the underlying hardware, server (Windows Server), and MS SQL Database limitations discussed by Microsoft (which support thousands of users and simultaneous transactions). Since our system leverages high available IIS applications, the system can support thousands of users. Our largest client, to date, by number of users is 1,165 users (State of Colorado). Any license limitation based on purchased concurrent user access to Contract Insight, is based on the total number of concurrent user licenses that have been purchase based on your licensing agreement with CobbleStone Systems.

The system supports integrated security with Windows Active Directory via IIS Integrated Authentication. Contract Insight design follows standard Microsoft DNA Web architecture. Contract Insight leverages Windows Server Active Directory for integrated authentication that leverages your AD rules and permissions. In addition, Contract Insight can run in a stand-alone authentication mode.

### **Powerful Role and Credential based security and permissions**

Contract Insight Enterprise provides role-based, Department/Division based, and login credential based security for all database records and associated attached files/documents. Each user/employee is assigned to roles such as Admin, Read-only, limited to department and Contract Insight includes user level permissions to assign if a user has full rights, read only, add only, delete and update for their department/division, and can limit what contracts the users can search and view. The vendor gateway includes the ability for a vendor to login, review a read only view of their assigned contract, request new contracts, submit notes and documents. Contract Insight includes user based security to limit what the user can see, read, view, modify, update, search, and delete. Contract Insight allows for the transferring of Contracts (and / or tasks) by any field including Project name.

### **Comprehensive, Granular audit Trail and Logging**

Contract Insight Enterprise includes a very granular audit trail that includes logging of user events such as: log in, log in failures, view, edit, delete transactions, and all transaction store the system date/time and user of the transaction. In addition, Contract Insight Enterprise includes robust and flexible suite of searching querying and reporting tools which provides custom reporting of any data fields, including user-defined fields, as required by your organization. There is a full and granular permissioning base that our system employs for every

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action that can be taken within the system. Each user of the system can be setup to have a custom set of permissions and privileges as required by your organization. In high availability deployments, the failover and redundancy is provided as per a Clustered SQL Server and follows the Microsoft SQL Standards. Compliance with a regular database backup schedule coupled with MS SQL Server's Transaction Log File allows for system recovery in the event of a failure. The recovery is based on the MS SQL Trans logs and back up history. Contract Insight includes all change and audit history down to the field level. The system will track original values, dates/times, and employees that changed each field, and track log in attempts, viewed contracts and every record that is added, modified, deleted, and changed down to the field level. Contract Insight includes all change and audit history down to the field level. The system will track original values, dates/times, and employees that changed each field, and track log in attempts, viewed contracts and every record that is added, modified, deleted, and changed down to the field level. Contract Insight has a full audit trail and system logging such as who logs in, what log in failed, what records were accessed, modified, added, deleted, what fields were changed/by whom/and when (with storing of the old value and the new value). In addition, the audit trail is fully reportable.

### Full Workflow Task, Milestone and Alert Creation and Management

Contract Insight Enterprise supports full workflow task creation and management. Contract Insight Enterprise Workflow is fully flexible and configurable based on contract type, division/department, location, price, and any other field contained on the contract screen. Each workflow task will generate an email alert and a calendar alert to the person or persons the task belongs to. Furthermore, the task can be defined as a recurring task based on a selected schedule, and the task can be optionally defined with an escalation rule. Contract Insight Enterprise provides a comprehensive, robust environment and suite of tools and accelerators which enable you to define, adjust, manage and monitor the custom contract lifecycle that your organization needs and requires, including contract creation, negotiation, tracking, and vendor/client negotiation.

..... and so much more ..... **Contact us today to schedule your live test drive!**