MBSi CORP.
an Agero company

Contract Comply

Vetting Reviewer

Release Notes

v1.1.1.6 • 05/04/2018

Contents

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User Stories

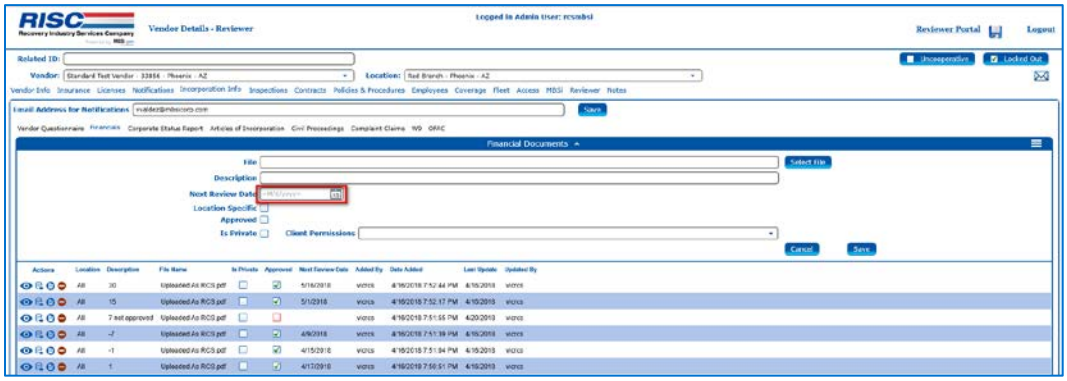
US 1800 – CC – Update RISC Fax Number on Automated Notifications

The RISC Fax number has been updated to (813) 423-6618 on all automated vendor notifications that are sent when the system determines that they are nearing (30, 15, 7, 1 day) or past (-1, -7 days) a document's expiration date.

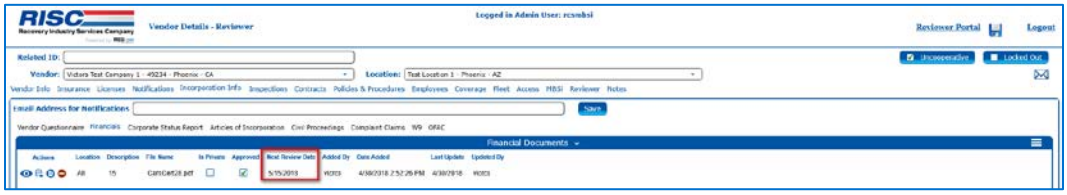
US 2121 – CC – Agent & Client Notification on Items w/o Expiration date field

A **Next Review Date** field has been added to the **Vendor Questionnaire** grid of the **Vendor Details** interface under the following tabs and sub-categories:

- **Incorporation** Tab
  - **Financials**
  - **Corporate Status Report**
  - **Articles of Incorporation**
  - **Civil Proceeding**
  - **Complain Claims**
  - **W9**
- **Contracts** Tab
- **Policies & Procedures** Tab



Use the **Next Review** date field to assign a date for the next review of the subject documentation to take place. When you set the next review value at the time of document upload, the grid will display the date on the **Next Review Date** column of the grid.



The documentation corresponding to the tabs and sub-categories described above will now trigger expiration notifications as the Next Review Date will be used by the agent notification service to advice vendors of expiring documentation on a schedule of 30, 15, 7, 1, days prior to expiration and -1 and -7 days after expiration.

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Additionally, the documentation corresponding to the tabs and sub-categories described above will now cause the soon to expire documentation to display as a line item on the **Reviewer Expirations Queue** based on the other filtering factors set on the interface.

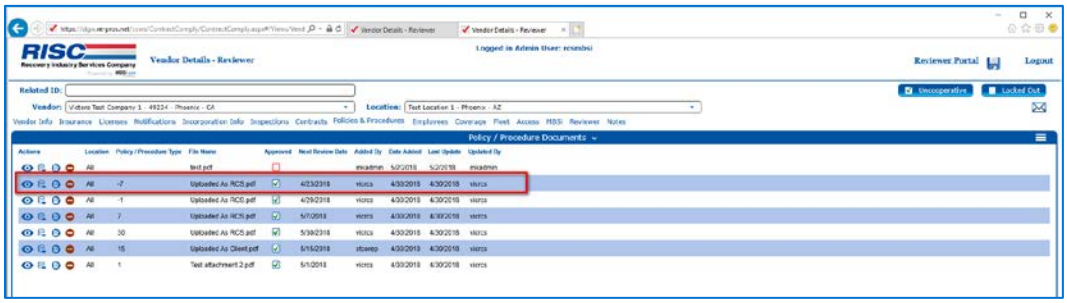


Figure 1 - The highlighted Policy/Procedure document upload has a Next Review Date of 4/23/2018. It is currently -7 past its expiration and will show in the Reviewers Expiration Queue (Figure 2).

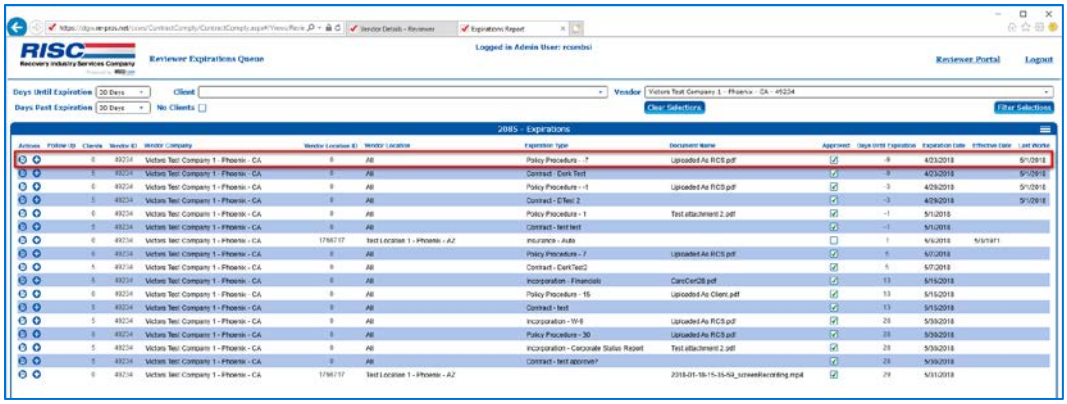
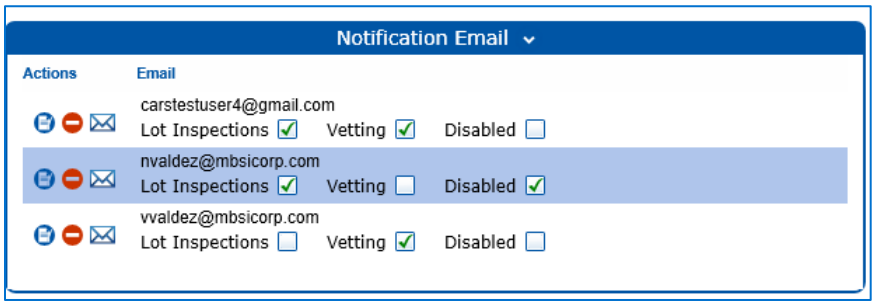


Figure 2 - The Policy and Procedure document highlighted in Figure 1 is also displayed in the Reviewer Expiration Queue.

US 2249 – CC – Add Vendor Notification Email Field to Vendor Details

The **Notification Email** section of the **Vendor Details** interface has functionality that allows you to manage notification email information for your vendors.



When you display a vendor's details the control displays the current notification emails that are set up for the company. Within you'll see the recipient's address, and whether they are set up to receive notifications for updates on one or more of the following processes:

- **Lot Inspections**

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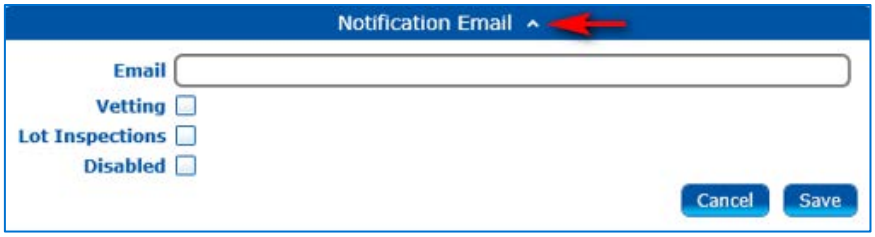
- **Vetting**
- **Disabled**

It also provides functionality for you to add, update, and delete email notification set up records. You can also use the control to send an email to a recipient.

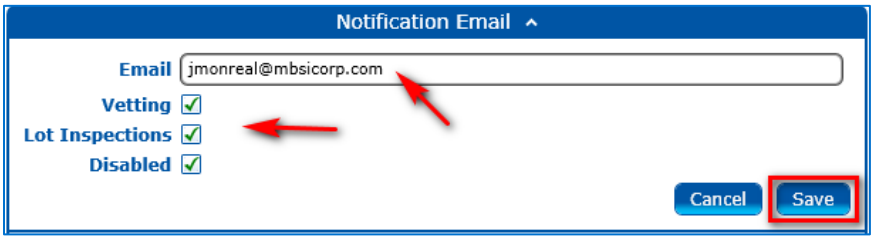
Adding a Record

To add a record:

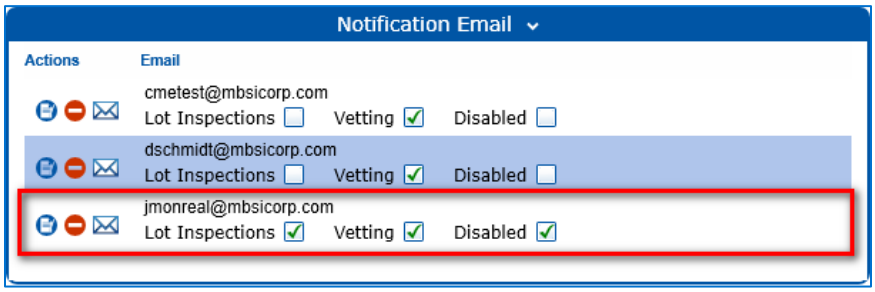
1. Click the dropdown arrow next to the **Notification Email** section header to expand the control.



2. Enter an **Email**.
3. Select one or more of the following checkboxes:
   a. **Vetting**
   b. **Lot Inspections**
   c. **Disabled**
4. Click **Save**.



The new email record will be added to the grid.



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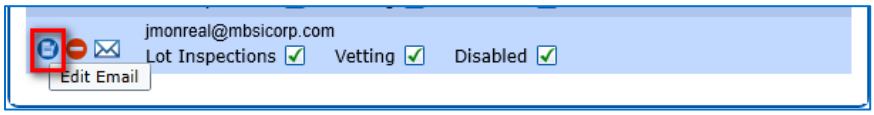
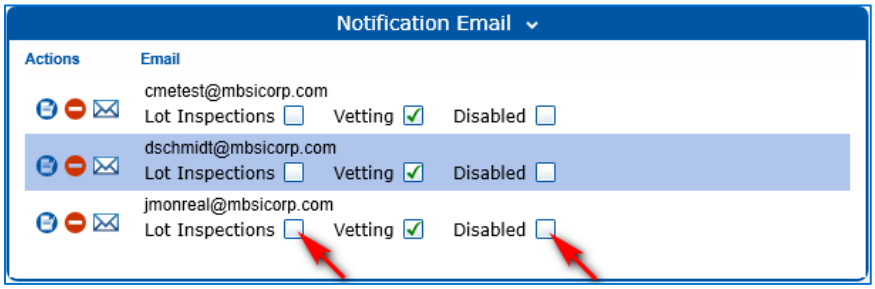
Editing a Record

To edit an existing notification email record:

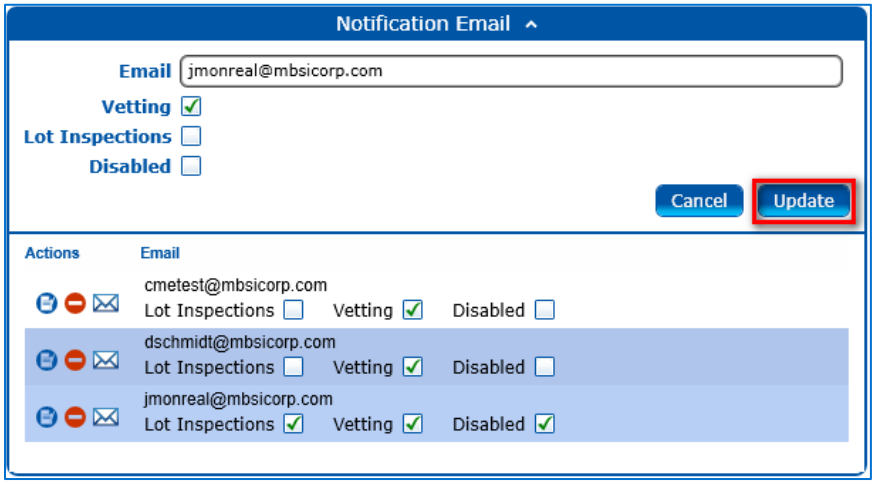
1. Click the **Edit Email** button on the **Actions** column of the grid.



The control will expand and display the editing controls for the notification record.

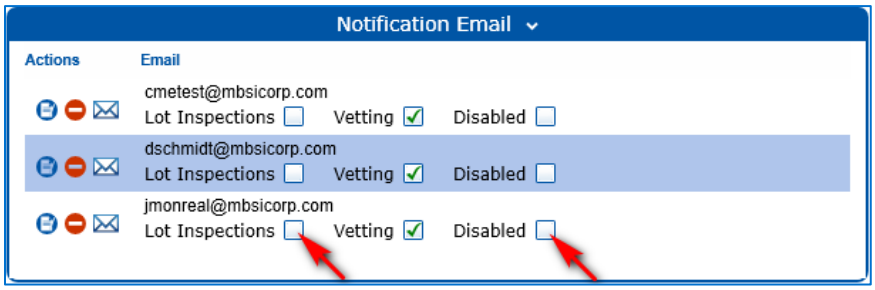


2. Make changes as required and click **Update**.



In the example above the **Lot Inspections** and **Disabled** checkboxes were unselected.

The changes will be reflected in the **Notification Email** grid.



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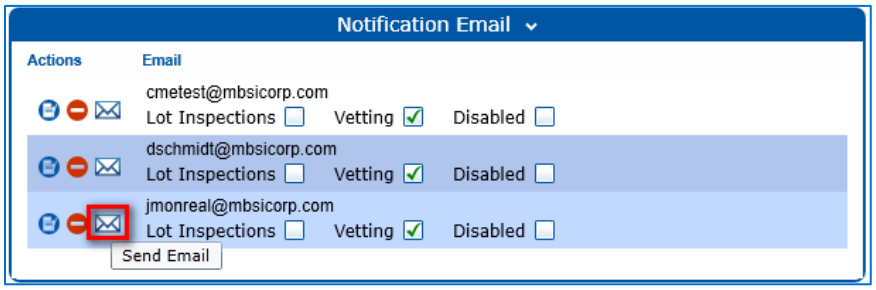
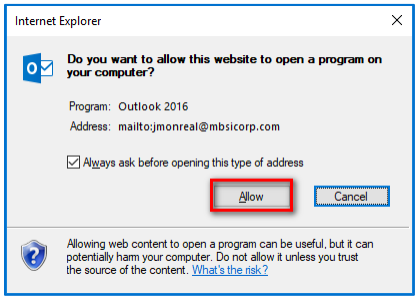
Sending an Email to a recipient

The **Notification Email** section has functionality to send a recipient an email from the interface. To do so:

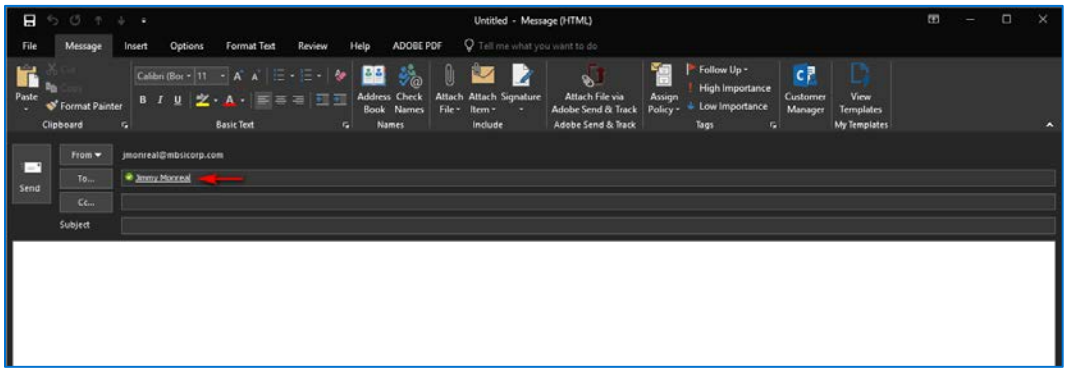
1. Click the **Send Email** button on the **Actions** grid.



2. If a warning dialogue asking you to allow the browser to open your email program displays, click **Allow**.



Your default email program will display a new email draft with the recipient's information already filled out.



3. Enter email text and send as you would any other email.

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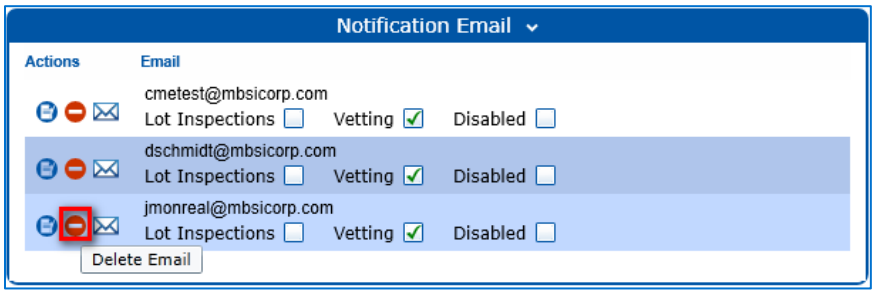
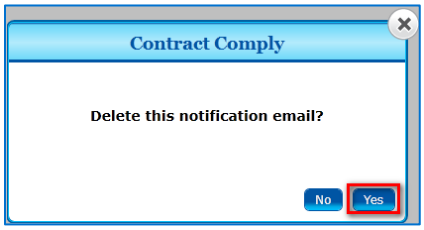
Deleting a Record

To delete a record:

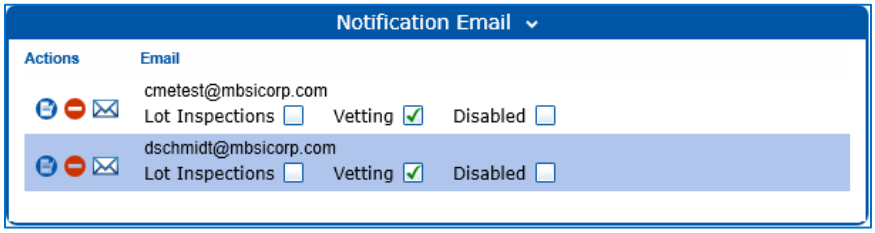
1. Click the **Delete Email** button on the **Actions** grid.



2. Click **Yes** on the "Delete this notification email?" dialogue.



The email notification record will be deleted from the grid.



US 2334 – CC – Uncooperative Vendor Checkbox

The **Uncooperative Vendor** checkbox gives you the ability to track vendors that have been uncooperative in providing vetting documents required by clients in Contract Comply. You can find it at the top right corner of the **Vendor Details** interface.

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When clicked, the **Vendor Flags** interface will display.

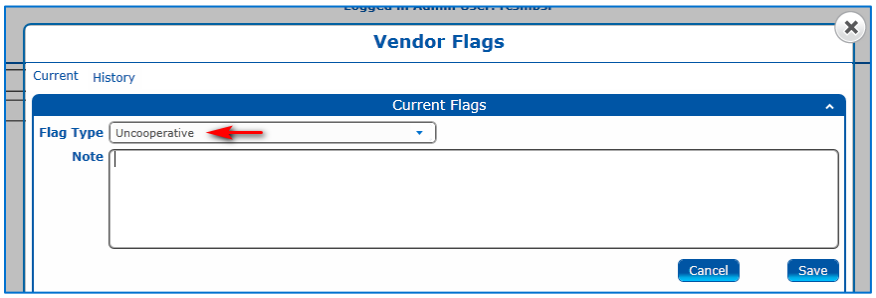
Here you can add an Uncooperative flag to the vendor in question.

Adding an Uncooperative Vendor Flag to the company

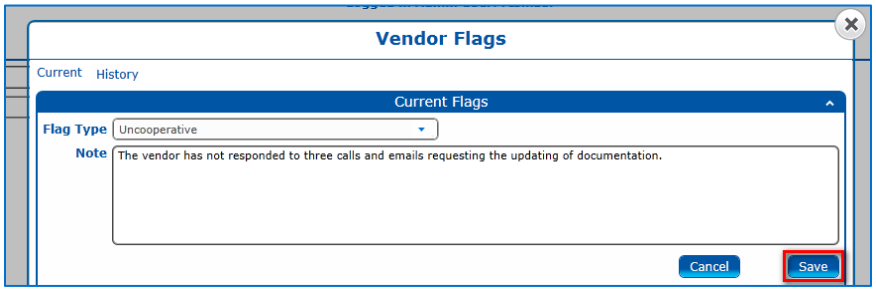
To add an "Uncooperative Vendor" flag to the company:

1. Click the dropdown arrow on the top right-hand side of the **Current Flags** grid.

The grid will expand and display controls to set the flag. The **Flag Type** will be set to *Uncooperative* by default.



2. Enter a reason for setting the flag in the **Note** field.
3. Click **Save**.



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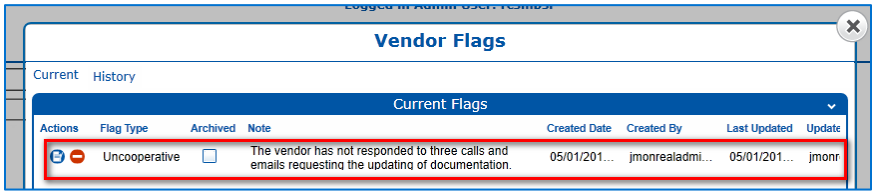
You will be taken back to the **Vendor Flags** interface where the Uncooperative flag will now display on the **Current Flags** grid.

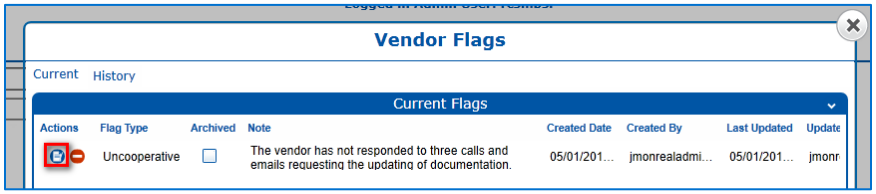


Additionally, the **Uncooperative** button on the **Vendor Details** interface will be selected, signifying that the vendor has been recorded as uncooperative.

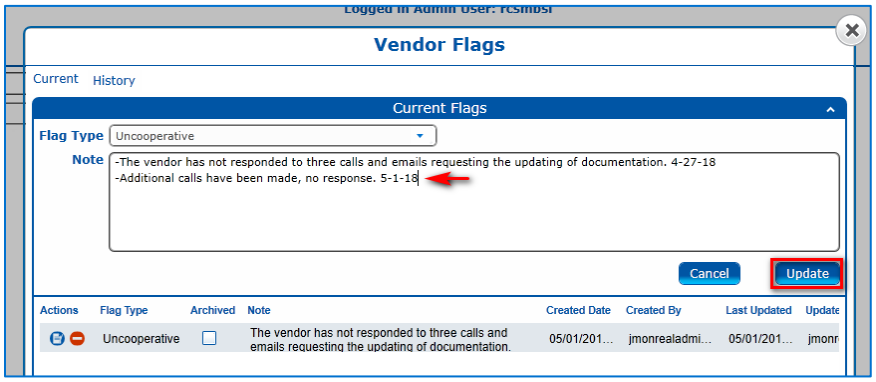
Editing an Uncooperative Flag

You can place additional information on the Uncooperative flag note that has already been created. To do so:

1. Click the **Edit** button on the **Current Flags** grid for the uncooperative flag in question.



2. Place additional comments on the **Note** field.
3. Click **Update**.



The flag will be updated with the new information.

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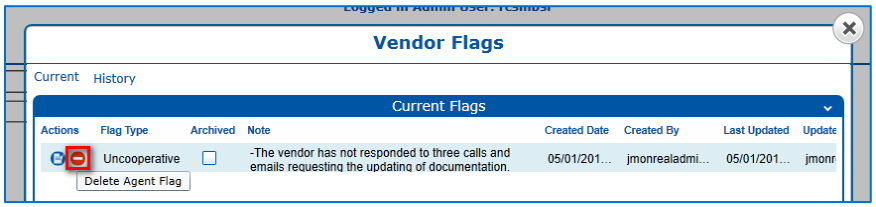
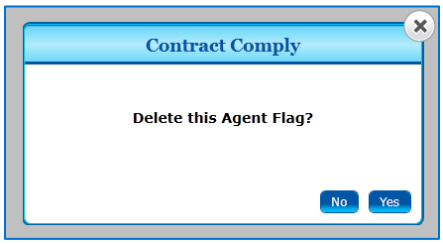
Deleting an Uncooperative Flag

To delete an Uncooperative flag:

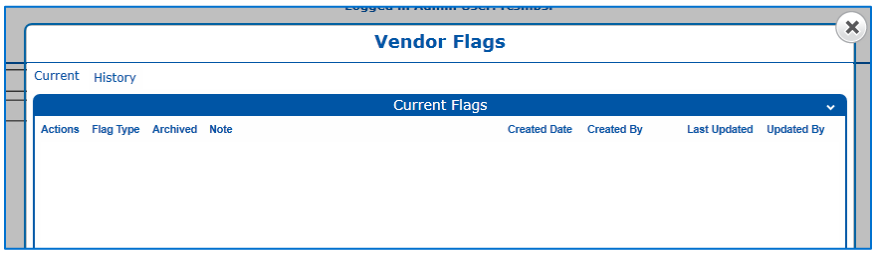
1. Click the **Delete Agent Flag** button on the **Actions** column of the **Current Flags** grid.



2. Click **Yes** on the “Delete this Agent Flag?” Contract Comply dialogue.



The line item will be removed from the grid.



The **Uncooperative** button on the **Vendor Details** interface will be unselected, as the flag has been removed.

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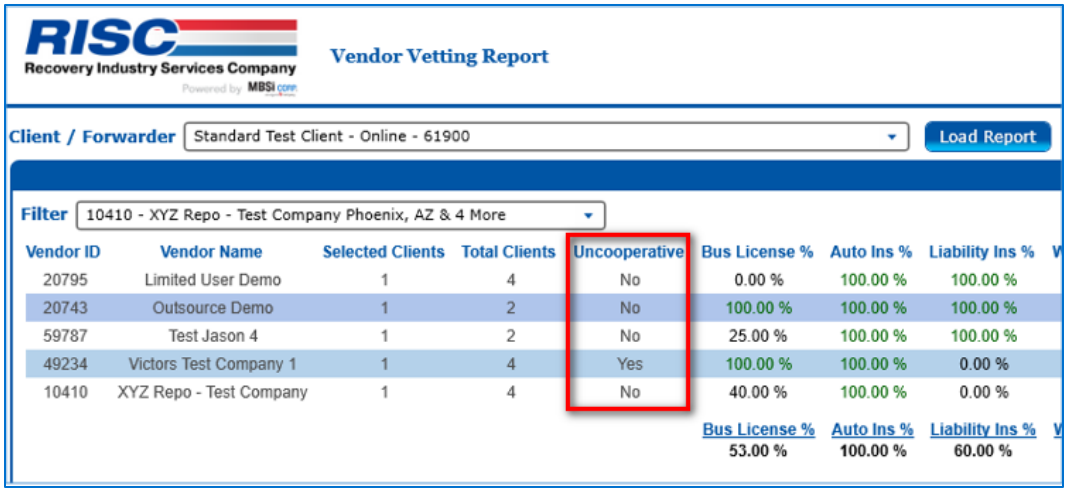
Vendor Flags Interface History Update

When changes are made to the status of the Uncooperative flag for a vendor, they are recorded in the **History** tab of the **Vendor Flags** interface in the **Flag History** column.

Uncooperative Status Reflected on the Vendor Vetting Report

When you flag or remove an Uncooperative flag from a vendor company on their **Vendor Details** profile, the **Vendor Vetting Report** will reflect the change. It will display a "Yes" on the **Uncooperative** column of the report for the vendor's line item if they have been marked as uncooperative, and a "No" if the flag is not currently enabled.



US 2610 – CC – Create Ability for RISC to send Free Form Notification within CC for Vetting

The **Send Email** button on the **Vendor Details** interface records history information on email notifications systematically or manually sent to a vendor. It also provides functionality to send free-form notifications.

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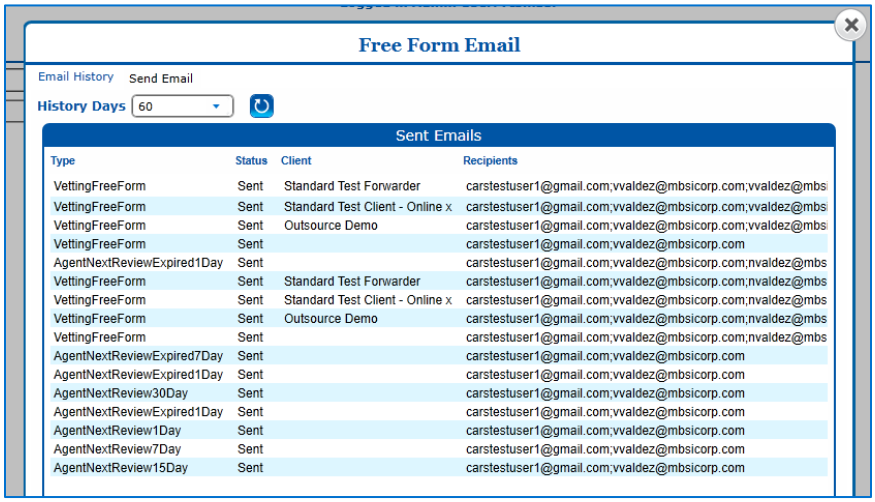
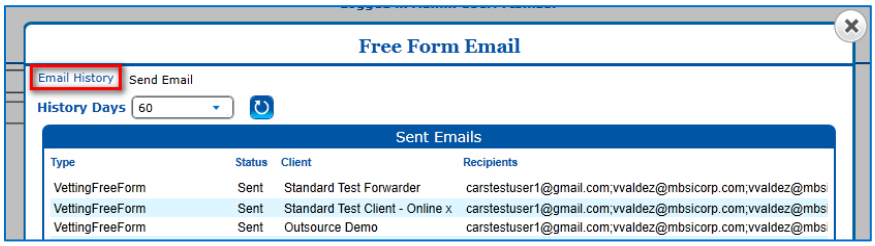
When clicked, the **Free Form Email** interface will display.



There are two tabs on the interface; **Email History** and **Send Email**.

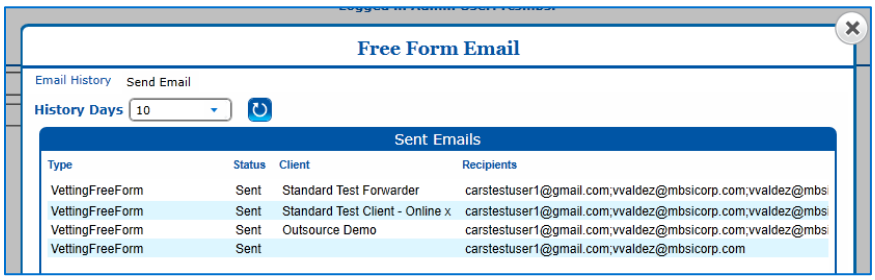
Email History Tab

The **Email History** tab displays vendor notifications that have been sent systemically by Contract Comply (e.g. Expiration notifications), or manually (e.g. Vetting communications) by a vetting user.



Sorting by History Days

The **History Days** dropdown filters the grid based on the amount of days since the notification was sent. The dropdown has selections for *All*, *30*, *60*, *90* days. You can also enter a freeform value directly into the dropdown and sort by that amount of days. To sort the grid by history days, freeform enter a number into the **History Days** dropdown or select a value.



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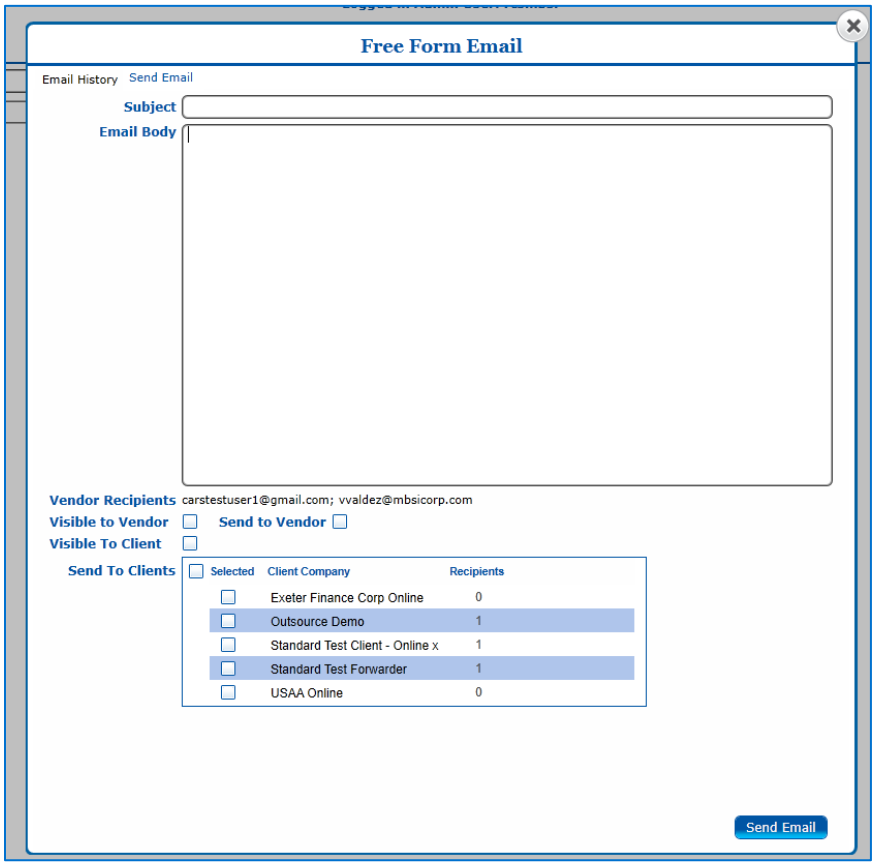
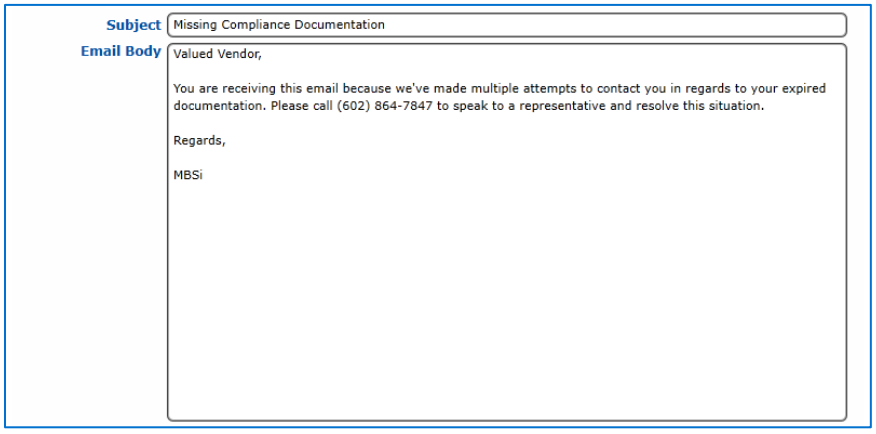
Send Email Tab

The **Send Email** tab gives you the ability to send an email to the vendor and/or client directly from within the application.



To send an email:

1. Enter the reason for the email in the **Subject** field (required).
2. Enter the email text into the **Email Body** field (required).



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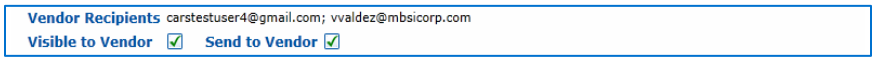
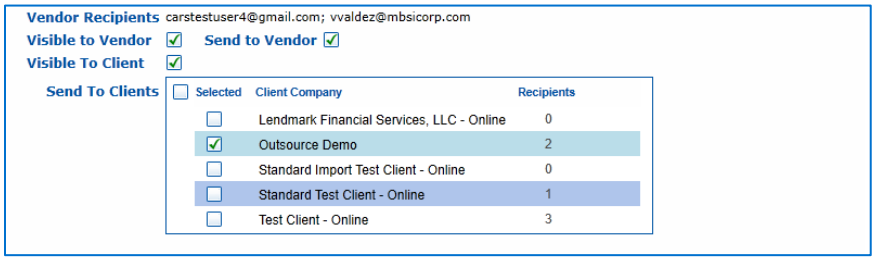
The **Visible to Vendor** and **Visible to Client** checkboxes give you the ability to select whether history information about the notification will be visible to the client/vendor. Selecting either checkbox will make the notification History visible to the selected recipient.

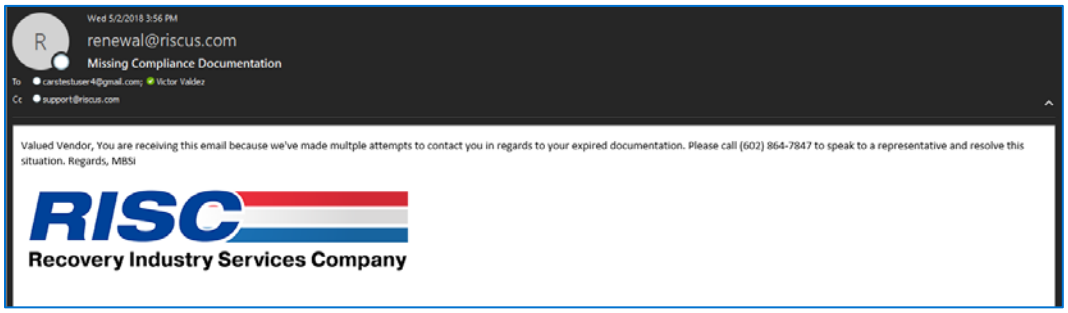


3. To send the email to the Vendor click **Send to Vendor** (optional).
4. To send the email to the Client select the available clients from the **Send to Clients** section (optional).



5. Click Send Email.

The email will be sent to the selected recipients.



Additionally, history information regarding the email send will be placed in the **Email History** tab.

US 2611 – CC – Agent & Client Notification on Items w/o Expiration Date in Field CC

See User Story 2121 for more information.

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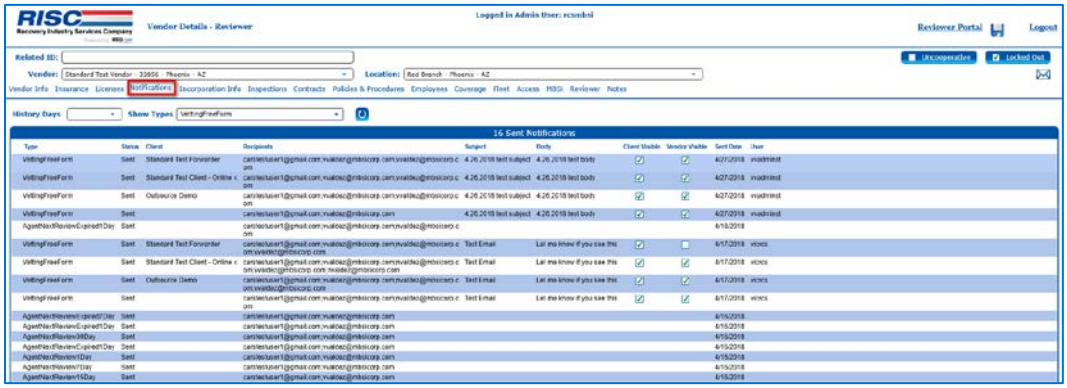
US 2908 – CC – Create Notification History Log within CC for Vetting

The **Notifications** tab of the **Vendor Details** interface displays vendor notifications that have been sent systemically by Contract Comply (e.g. Expiration notifications), or manually (e.g. Vetting communications) by a vetting user.

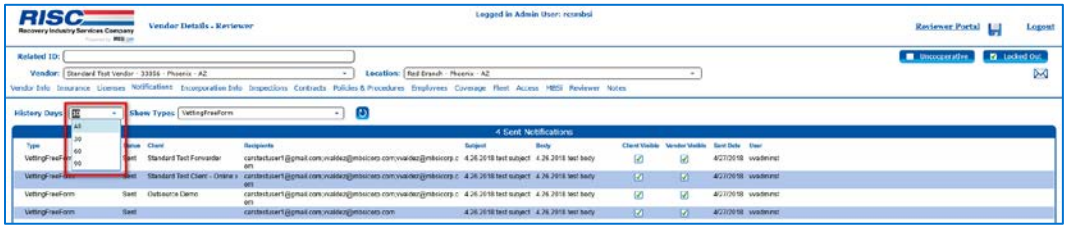


The grid displays notification information and provides functionality to sort the grid and affect the visibility of notification history.

The grid can be filtered based on history days.

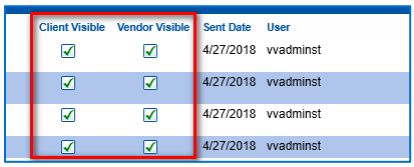
Sorting by History Days

The **History Days** dropdown filters the grid based on the amount of days since the notification was sent. The dropdown has selections for *All*, *30*, *60*, *90* days. You can also enter a freeform value directly into the dropdown and sort by that amount of days. To sort the grid by history days, freeform enter a number into the **History Days** dropdown or select a value.



Making Notification History Visible to Clients and Vendors

The **Notifications** grid also allows you to set the visibility of notification history for your Clients and Vendors. The **Client Visible** and **Vendor Visible** checkboxes toggle the visibility of notification history for Clients and Vendors on and off.



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When the checkbox is selected the Client/Vendor associated with the notification will have visibility on the notification within the **Notifications** grid of their **Vendor Details** interface.

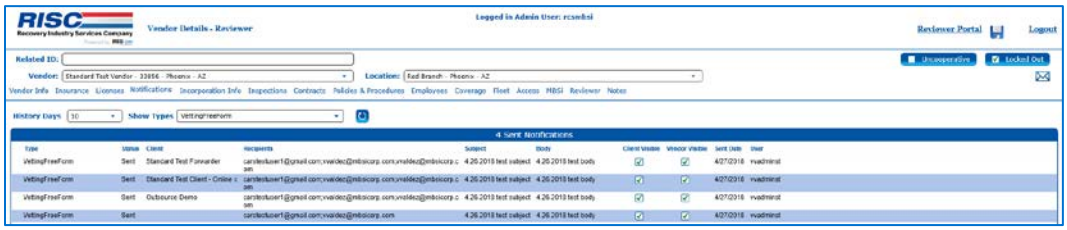

Figure 3 - Reviewer view of Notifications History for last 10 days For Standard Test Vendor, Red Branch

Figure 4 - Client view of the same parameters as Figure 1 when Client Visible checkbox is selected.

Conversely, if the visible checkbox is unselected the Client/Vendor will not be able to see notification activity in their **Notifications** grid.

US 3263 – CC – Agent & Client Notification on Items w/o Expiration without Date Field

See User Story 2121 for more information.

US 3265 – CC Create ability for RISC to Send Free Form Notifications Within CC for Vetting

See User Story 2610 for more information.

Defects

Defect 2124 – CC – Reviewer Notification Email Duplicating

Fixed an issue that was causing previously existing email records to not be displayed on the **Review Notification Email Settings** interface when a new email record was being entered for a company, and you switched to view another company's email settings.

Defect 2183 – CC – Agents Receiving Unnecessary Expiration Notices

Pointed the service that sends out document expiration notices to vendors to the new table that has been created to house expiration information. This addresses an issue that was causing document expiration emails to go out at incorrect times based on the information stored on the old table.

Defect 2248 – CC – License Tab: Editing Documents Error – Cannot Remove an Entity that has not been Attached

Addressed a "Cannot remove an entity that has not been attached" error that was occurring when editing documents that have been set to one or more specific locations, but not every location, on the **License** interface.

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Defect 2252 – CC – Vendor Questionnaire License Transfer

Pointed the Vendor Questionnaire approval service to point to its new location on the database to address an issue that was causing new business license documents to not be displayed on the Vendor Questionnaire interface after being added.

Defect 2447 – CC – Active Lot Inspection UI not Displaying Provider Info

Addressed an issue in the **Active Lot Inspection** interface that was causing certain providers to fail to display on the grid within the interface.

Defect 2900 – CC – Business Licenses Tab – Unable to view documents

Updated the **Business License Child Window** dialogue of the **Vendor Vetting Report** to pull license documents from the new License Tables. Additionally, work was done to update the **View** and **Download** events to point to the same location. This was done to address a situation where business license documents would be uploaded, but they would not display on the interface.

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