CobbleStone Software - Release Notes
Contract Insight Version 22.6.2 Rev 260320 (Patch)

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Patch Overview-Version 22.6.2

Release Version Information

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

Release Version Number	**Client Release Date**	**Release Type** ***(from prior release)***
22.6.2 (Rev 260320)	24 March 2026	Patch

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For CobbleStone Software version 22.6.2 (Rev 260320), 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

Patch 22.6.2 - 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: Watermark Management for PDF Documents

Reference #: 260320.345.17836

We've introduced a new feature that gives System Administrators the ability to manage watermarks for PDF documents directly within Contract Insight. This feature provides greater control over how sensitive documents are marked when downloaded or viewed.

With this update, System Admins can:

- Create, edit, and delete watermarks
- Choose between text-based or image-based watermarks
- Optionally set a single default watermark for all PDFs in the system

Watermarks are applied as an overlay when a PDF is downloaded or previewed, ensuring the original file remains unchanged. This design prevents interference with features like signing or OCR while still allowing organizations to mark documents consistently.

All watermark settings are managed in one centralized location:

Manage/Setup → Application Configuration → PDF Watermark Configuration

From there, System Administrators can review existing watermarks, create new ones, or select a default. Once a default is set, any PDF opened or downloaded in Contract Insight will automatically display the chosen watermark.

This feature helps organizations improve document control and visibility while keeping the user experience simple and efficient.

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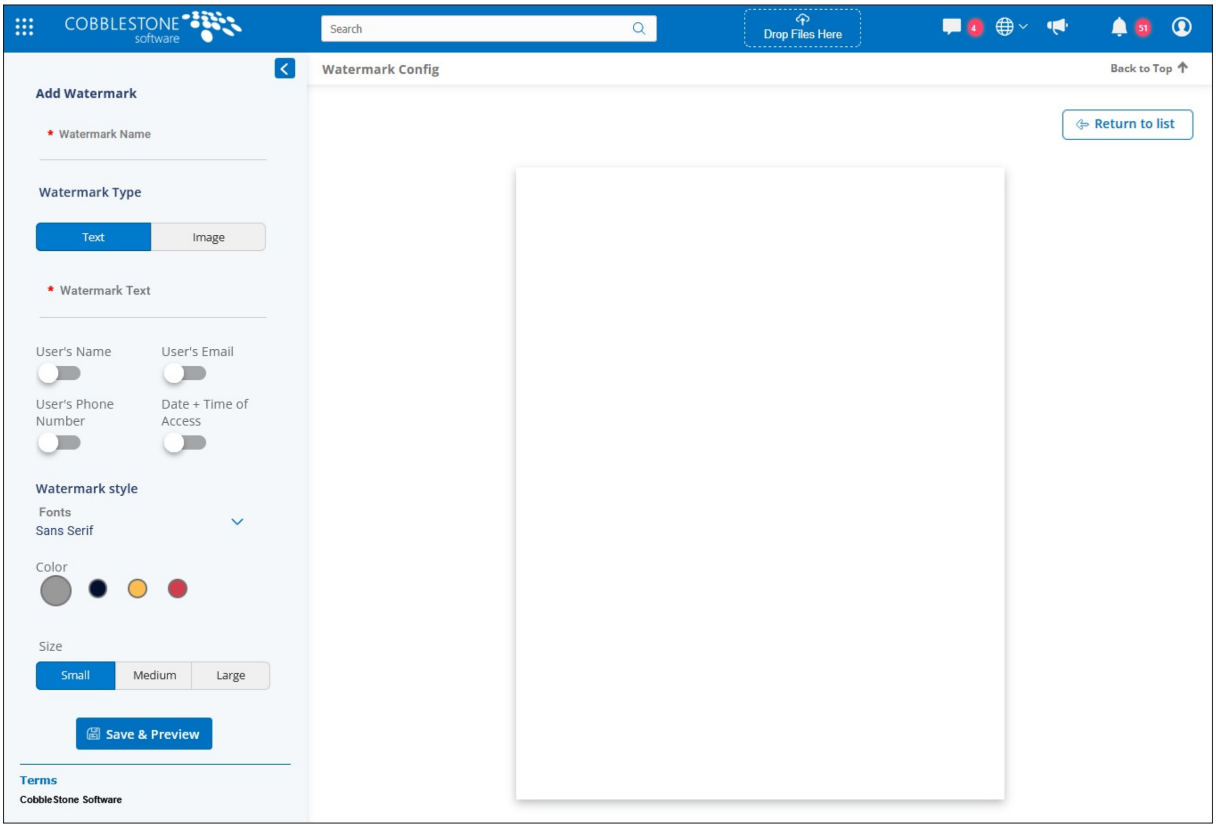
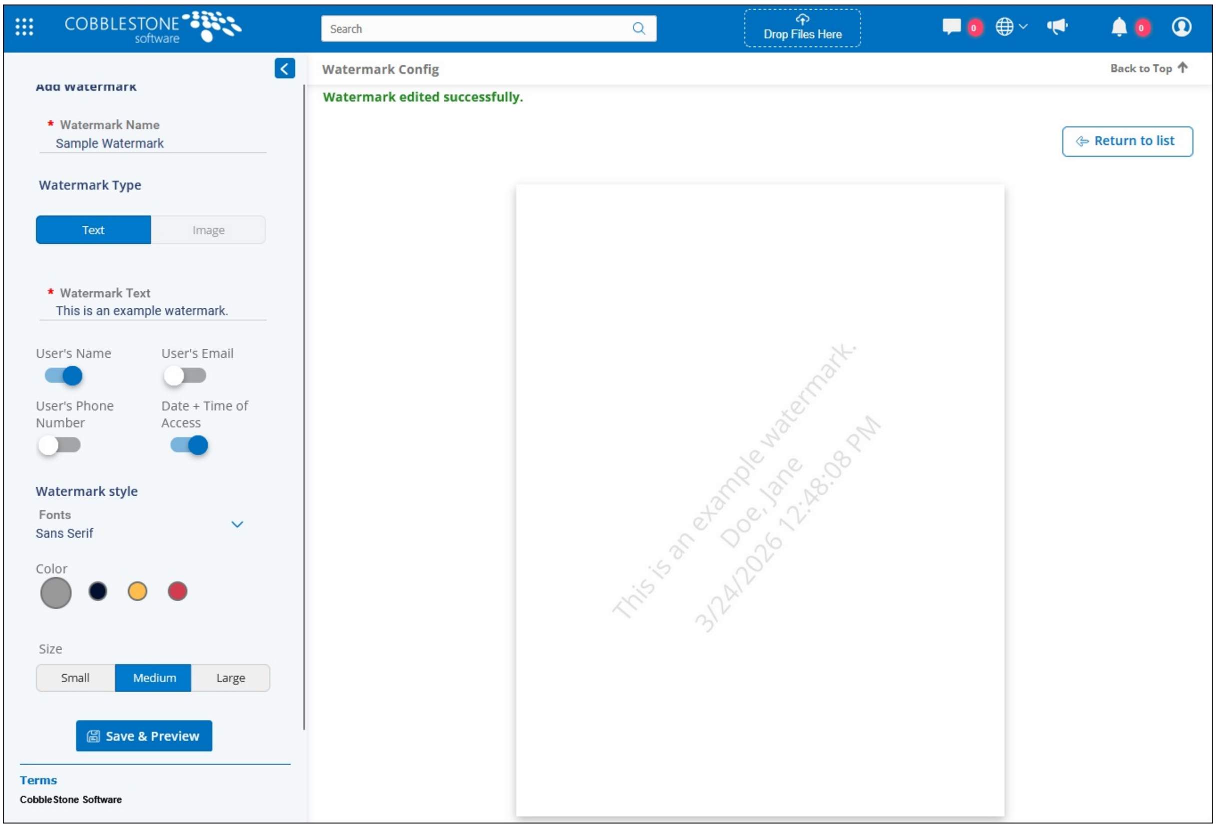

COBBLESTONE software
Search
Drop Files Here
Add Watermark
* Watermark Name
Watermark Type
Text
Image
* Watermark Text
User's Name
User's Email
User's Phone Number
Date + Time of Access
Watermark style
Fonts
Sans Serif
Color
Size
Small
Medium
Large
Save & Preview
Terms
CobbleStone Software
Watermark Config
Back to Top
Return to list


COBBLESTONE software
Search
Drop Files Here
Add Watermark
* Watermark Name
Sample Watermark
Watermark Type
Text
Image
* Watermark Text
This is an example watermark.
User's Name
User's Email
User's Phone Number
Date + Time of Access
Watermark style
Fonts
Sans Serif
Color
Size
Small
Medium
Large
Save & Preview
Terms
CobbleStone Software
Watermark Config
Back to Top
Watermark edited successfully.
Return to list
This is an example watermark.
Doe, Jane
3/24/2026 12:48:08 PM

CORE SYSTEM RESOLUTIONS

RESOLUTION: Some Users Unable to Access Survey History

Reference #: 260320.365.26304

We've resolved an issue that prevented some users, including Super Users, from viewing the history of surveys on Contract records. Previously, when navigating to a Contract record and opening Ratings & Surveys → Manage Survey → View History, users might have seen a red message stating they did not have permission to view the page.

With this update, the system now correctly confirms whether a user has permission to view the related Contract. If they do, the survey's history will display as expected.

RESOLUTION: Deleted Graphical Dashboard Causing Issue Displaying Security Group Information

Reference #: 260320.1259.23570

We've resolved an issue that affected the display of information when opening certain security groups. Some users reported that when accessing specific security groups the page appeared to load but did not show the expected tables and details. The error message was present but hidden behind a gray panel, making it hard to identify the issue.

Users also found that if they first opened another security group that loaded correctly, then switched back, the information would display as expected. This issue occurred because the system was attempting to load a graphical dashboard that was no longer assigned.

With this update, the system now properly handles cases where a graphical dashboard is missing. Users can also safely remove dashboards from security groups without encountering display errors.

RESOLUTION: ContractTerm Field Triggering Error When Loading Contract Search Results

Reference #: 260320.365.24117

We resolved an issue where users received an error when navigating to Contracts → Find/Search Contracts. This occurred when the ContractTerm column was included in the search grid, causing the page to fail before loading results.

The system now ensures the Contract Search page loads normally. Users can once again access and use the search functionality without encountering errors.

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RESOLUTION: Incorrect Field-Length Validation Causing Error When Creating New Records

Reference #: 260320.1273.25309

We resolved an issue where users encountered an error stating that a field's value exceeded its maximum allowed range, even when the text entered was within the field's defined limits.

The validation process has been updated and refined to correctly evaluate only the actual field value. As a result, users can now create records without receiving this incorrect error message.

RESOLUTION: Configuration-Dependent Query Issue Causing Employee List Page Failure

Reference #: 260320.1203.29295

We resolved an issue where users encountered an error when trying to open the Employee List. This occurred only in environments where the "Employee List Screen Visible to All Employees" setting was enabled.

The system was not correctly connecting to the employee data when this setting was active, causing the page to fail before displaying results. The underlying logic has been updated to properly include employee information when needed.

With this fix, users can now access and view the Employee List without errors, and the page loads as expected.

RESOLUTION: Edge-Case Data Handling Issues Causing Display Errors and Save Failures in Specific Field Types

Reference #: 260320.337.29335

We resolved three related issues where older versions of the system silently masked edge-case failures, which became visible after recent platform improvements designed to load and validate data more precisely. These fixes ensure more reliable field rendering, consistent data display, and dependable saving behavior across all forms.

1. Subtable Primary Keys Displaying as Blank

Some user-defined subtables showed blank values for their primary key column even though the data was stored correctly. This occurred because the platform identified the primary key using a universal internal name ("RecPrimaryKey"), while the display grid expected the subtable's specific primary key field name. Older versions unintentionally hid this mismatch by always loading all fields, but the enhanced version only loaded fields defined for display, revealing the discrepancy. The system now correctly aligns the internal key with the displayed key, ensuring primary key values appear as expected.

2. Locked Email/Hyperlink Fields Preventing Save

Forms containing email or hyperlink fields marked as "locked" (non-editable) could fail on save. Locked versions of these fields render as display-only labels without an associated input control, and this mismatch led to a validation error during saving. The save logic has been updated to properly handle display-only locked fields, ensuring consistent behavior across all form types.

3. Dropdown Fields With No Defined Options Blocking Save

Comma-separated dropdown fields with no predefined options caused a hidden failure. Previously, the system silently substituted a default "Select one" option, allowing the form to function. After recent improvements, the silent failure instead blocked the save button from working. The dropdown logic has been corrected so that empty option sets are handled cleanly without blocking the ability to save the form.

Patch 22.6.2 - 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: Global Setting to Disable Delegation for Approvals and Signatures

Reference #: 260320.1157.25437

We've added a new configuration setting that allows organizations to prevent users from delegating their approval or signature responsibilities. This feature helps ensure that only the intended, authorized individuals can complete approval and signing tasks, supporting stronger governance and compliance.

System Administrators can now enable the Disable Delegation setting within the General system configuration.

- When Disable Delegation is set to **True**, the option for users to delegate participants during approval or signature workflows is removed.
- When set to **False**, users will continue to see the delegate option as they do today.

This feature provides organizations with more control over their workflow integrity by ensuring that sensitive actions—such as approvals and signatures—cannot be reassigned without oversight.

ENHANCEMENT: Setting to Prevent Approvers from Uploading Documents During Review

Reference #: 260320.345.26562

We've added a new configuration setting that gives organizations greater control over how documents are handled during the approval process in Document Collaboration.

With this feature, System Administrators can choose to prevent approvers from uploading files while completing their approval tasks. When enabled, approvers will still be able to review and edit documents directly within the built-in editor, but they will no longer be able to upload revised versions from outside the system. This helps maintain document version integrity by ensuring that all edits stay within the platform.

System Administrators can manage this setting by navigating to:

Manage/Setup → Application Configuration → Document Authoring → Prevent Document Uploading for Approvers

- When this setting is **True**, approvers can view and edit documents in the platform but cannot upload new versions.
- When **False**, approvers may upload documents as part of the approval process, consistent with current behavior.

This enhancement helps organizations ensure consistent document handling, reduce version risks, and maintain tighter control during approval workflows.

ENHANCEMENT: **Ability to Pre-Configure Signature Placeholders in Document Templates**

Reference #: 260320.1157.10621

We've introduced an enhancement that streamlines the signing process by allowing signature, date, and text placeholders to be added directly within document templates—before the template is ever merged onto a record. This means users no longer need to re-create placeholder locations each time a template is used, saving time and ensuring consistent placement across every document generated from that template.

With this enhancement, template designers and administrators can:

- Add predefined placeholders to templates using Microsoft Word or the CobbleStone Editor
    - Supported placeholder formats include:
        - {---Signer---} for Signature
        - {---Date---} for Date
        - {---Text---} for Text
- Assign participants to those placeholders directly within the template
- Ensure all documents created from the template use a controlled, placeholder-based signing process rather than freeform signing
- Maintain placeholder integrity throughout merge, approval, and signature steps

During the signing process, the system automatically reads the placeholder positions, applies the correct participants, and replaces each placeholder with the appropriate signature block—ensuring accuracy and consistency across all documents.

If users remove placeholders during editing, those placeholders will be removed for the rest of the workflow. To maintain proper signing behavior, each placeholder must be assigned a participant before a signature process can begin.

Where to Access This Feature

You can add or manage placeholders within **Document Authoring Manager: Template Overview** by navigating to:

Content Setup → Attachments → Add Placeholders

This option appears for Word and PDF files attached to a template and works similarly to assigning placeholders during the merge process—but now happens at the template level.

This update provides a more efficient, reliable, and user-friendly signing experience by ensuring templates are fully prepared for signatures before they are ever used.

DOCUMENT COLLABORATION & E-SIGNATURE RESOLUTIONS

RESOLUTION: **Mismatched Page Orientation Causing Signature and Text Misalignment After Document Signing**

Reference #: 260320.345.24372

We resolved an issue in IntelliSign where signatures and accompanying text (such as name and title) appeared correctly aligned during the signing process but shifted out of place once the document was completed. This misalignment occurred on documents that used a different page orientation during signing than the rest of the document.

The system now correctly accounts for page orientation throughout the signing process, ensuring that signatures and text blocks remain in their intended positions when the document is finalized.
With this update, signatures will consistently appear where they were placed, regardless of document orientation.

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Patch 22.6.2 - 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 RESOLUTIONS

RESOLUTION: **Dropdown Handling Error Preventing Account Creation**

Reference #: 260320.1203.26347

We resolved an issue where users received an error immediately after clicking Create Account in the Vendor/Client Gateway. This happened because the system was not referencing a configuration setting used to determine when dropdown fields should switch to an autocomplete mode based on the number of available records.

The system now properly checks the setting, ensuring dropdowns behave consistently with Core functionality. As a result, the Create Account process now loads as expected without triggering errors.

RESOLUTION: **Gateway Date Updated Field Not Updating With Deletes on Request Subtables**

Reference #: 260320.1203.28150

We resolved an issue where deleting items from subtables—such as Request-related data or Request file records—did not update the Gateway Date Updated field on the parent Request in the Core system. This caused Request records to appear unchanged even when subtable information had been modified.

Recent improvements included updates to ensure that all relevant actions correctly refresh the request's Gateway Date Updated timestamp.

- **Subtable deletes now correctly update request timestamps**
  The system now verifies when a deleted subtable entry belongs to a request or request-file record and automatically updates the Gateway Date Updated field when such deletions occur.
- **Automatic updates after file uploads or subtable changes**
  The Request Details page now immediately refreshes the Gateway Date Updated field when a file is uploaded or when an item is removed from a subtable grid.
- **Correct field handling during subtable additions**

An issue where an incorrect record ID was being passed during subtable additions—resulting in inaccurate field values—has been fixed.

- **Legacy page routing updated**

  Navigation from the older "VCG_AdHocReports" page now correctly redirects to "Reports."

These improvements ensure that request records always show the correct last-updated timestamp, providing clearer audit trails and more accurate status tracking across the system.

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