



The Global Standard for eSignature

# Service Pack Notes

## Service Pack Notes for October 3, 2014

This document provides information about the updates deployed to the DocuSign Production environment as part of October 3, 2014 Service Pack. There are three sections in the Service Pack Notes:

- [Classic DocuSign Experience Updates](#)
- API Changes for [REST](#) and [SOAP](#)
- [Service Pack Bug Fixes](#)

These notes will be updated, as needed, when the Service Pack is deployed to the Production environment.

### Classic DocuSign Experience Updates

The following change has been added to the Classic DocuSign Experience.

#### Reports Updates

In response to customer demand, we added more optional data columns to the Envelope Report and Envelope Recipient Report. The optional data columns being added are:

Envelope Report Column	Description
Declined Date	The date and time the envelope was declined.
Delivered Date	The data and time the envelope status changed to Delivered.
EOD Document Profile ID	The document profile ID set by eOriginal when the document is successfully vaulted.
EOD Transaction ID	The transaction ID set by eOriginal when the document is successfully vaulted.
EOD Transaction Name	The transaction name set by eOriginal when the document is successfully vaulted.
Expiration Date	The date the envelope will expire. This date is based on expirations settings for the envelope or default account settings.
Reason for Voiding	The reason for voiding an envelope, as entered by the person that voided the envelope.
Sender Company Name	The sender's company as shown in their ID card.
Sender IP Address	The sender's IP address.
Sender Job Title	The sender's job title as shown in their ID card.
Signed Date	The date and time the envelope was signed.
Voided Date	The data and time the envelope was voided.

Envelope Recipient Report Column	Description
Envelope Voided Reason	The reason for voiding an envelope, as entered by the person that voided the envelope.
Signed on Mobile	Shows if the signer used a mobile device during signing.
Signed on Paper	Shows if the signer used the sign on paper option.
Sender IP Address	The sender's IP address.

## Access Code Format Settings

This change adds the ability for customers to set their own requirements, such as minimum length and format, for access code authentication. This option will initially only be available in the Classic DocuSign Experience web application, it will be added to the New DocuSign Experience web application and API at a later date.

**Important:** This option is available to all DocuSign account plans, but you must contact your Account Manager or DocuSign Support to request that the option be enabled for your account.

### To set the Access Code Format

After the option is enabled by DocuSign, you can set the format requirements as follows:

1. From the Classic DocuSign Experience, click your profile image in the upper right and select **Preferences**. In the navigation pane on the left side of the page, under the Account Administration heading, click **Features**.
2. Scroll down to the Authentication heading and click **Access Code Format**.



3. On the Access Code Format page:

 A screenshot of the 'Access Code Format' configuration page. It features a title 'Access Code Format' and several settings:
 

- Access Code format required
- Minimum Access Code length (6-50): 6 (dropdown menu)
- Access codes must include:
  - At least one letter (Aa-Zz)
  - At least one digit (0-9)
  - At least one special character

 At the bottom of the form are 'Save' and 'Cancel' buttons.

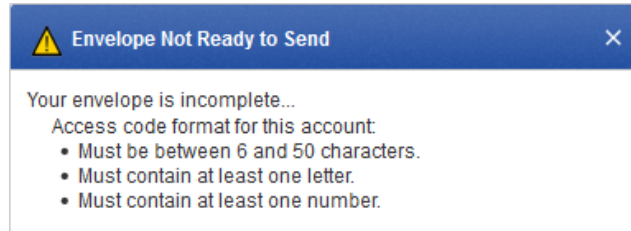
- Select **Access Code format required**.
- Select the Minimum Access Code length. This can be 6 to 50 characters.

- Optionally, select if Access Code must have at least one letter character, at least on number character, and at least one special character. Special characters are any keyboard characters that are not letters, numbers, or spaces.

4. Click **Save** to save the changes.

### **What Senders will see**

After the Access Code format is set for your account, if a sender adds an Access Code that does not meet the format requirements and tries to send the envelope (clicks **Send**) an error message with the Access Code requirements is shown. The sender cannot send the envelope until the Access Code is removed or meets the account requirements.



## **Sender as Signer Authentication Requirement**

In some cases, a customer's workflow requirements need to show that a recipient passed an authentication check, even when that recipient is the sender of the envelope. Currently the DocuSign signing workflow does not require senders that are also recipients of envelopes they send to pass authentication. This change adds the ability for customers to force envelope senders that are also envelope recipients follow the authentication requirements, except for email authentication, for the envelope.

This option is available for all DocuSign accounts.

*Example:* A sender is using a template that requires all recipients to pass use access code authentication. The sender is added as a signer and completes sending the template. The sender is then asked if they would like to sign the envelope. Normally, the sender would go directly to the signing workflow. However, when the sender as signer authentication requirement is enabled, the sender must pass the access code authentication check before they can sign the documents.

### **To Enable Sender as Signer Authentication Requirement**

You can enable the sender as signer authentication requirement as follows:

1. From the Classic DocuSign Experience, click your profile image in the upper right and select **Preferences**. In the navigation pane on the left side of the page, under the Account Administration heading, click **Features**.
2. Scroll down to the Authentication heading and select **Sender as Signer must authenticate when requested**.



3. Click **Save** at the bottom of the page to save the change.

## Fax Updates

DocuSign is changing the fax vendor used for our outbound and inbound Fax features. Senders and recipients of DocuSign envelopes will not see any change in functionality; only different fax numbers on the fax cover sheet.

For signers that need to return documents and attachments by fax, this change adds fax-back numbers for Australia. We will be adding numbers for other locales in the future.

Please note that the phone numbers for the currently supported locales (US, Canada, London, and Singapore) will change. The new numbers are reflected on the fax cover sheet.

## API Changes

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The following API changes were deployed to the DocuSign Production environment as part of October 3, 2014 Service Pack.

### REST API Changes

#### **Formula Tab Update:**

This change exposes the roundDecimalPlaces node for formula tabs. This sets the number of digits after the decimal point in formula tab. The only accepted values are 0 or 2.

#### **Recipient embeddedRecipientStartURL Update**

This change adds a new “sign at DocuSign” option for senders that are using the embeddedRecipientStartURL node for their embedded recipients.

When a sender uses the keyword value SIGN\_AT\_DOCUSIGN for the embeddedRecipientStartURL node, the recipient will be directed to an embedded signing or viewing process directly at DocuSign.

The signing or viewing action is initiated by the DocuSign system and the transaction activity and Certificate of Completion records will reflect this. In all other ways the process is identical to an embedded signing or viewing operation that would be launched by any partner.

It is important to remember that in a typical embedded workflow the authentication of an embedded recipient is the responsibility of the sending application and DocuSign expects that senders will follow their own process for establishing the recipient’s identity. In this workflow the recipient goes through the sending application before the embedded signing or viewing process is initiated. However, when the sending application sets embeddedRecipientStartURL=SIGN\_AT\_DOCUSIGN, the recipient goes directly to the embedded signing or viewing process bypassing the sending application and any authentication steps the sending application would use. In this case, DocuSign recommends that one of the normal DocuSign authentication features (Access Code, Phone Authentication, SMS Authentication, etc.) be used to verify the identity of the recipient.

#### **Update Account Billing Plan Documentation Update:**

This documentation update removes the following sub-nodes from the referralInformation node in the Update Account Billing Plan topic. These sub-nodes are not part of the referral information and were incorrectly included in the documentation.

- SaleDiscountAmount
- SaleDiscountFixedAmount
- SaleDiscountPercent

- SaleDiscountPeriods
- SeatPrice

## SOAP API Changes

### **Recipient EmbeddedRecipientStartURL Update**

This change adds a new “sign at DocuSign” option for senders that are using the CaptiveInfo - EmbeddedRecipientStartURL node for their embedded recipients.

When a sender uses the keyword value SIGN\_AT\_DOCUSIGN for the EmbeddedRecipientStartURL node, the recipient will be directed to an embedded signing or viewing process directly at DocuSign.

The signing or viewing action is initiated by the DocuSign system and the transaction activity and Certificate of Completion records will reflect this. In all other ways the process is identical to an embedded signing or viewing operation that would be launched by any partner.

It is important to remember that in a typical embedded workflow the authentication of an embedded recipient is the responsibility of the sending application and DocuSign expects that senders will follow their own process for establishing the recipient’s identity. In this workflow the recipient goes through the sending application before the embedded signing or viewing process is initiated. However, when the sending application sets EmbeddedRecipientStartURL=SIGN\_AT\_DOCUSIGN, the recipient goes directly to the embedded signing or viewing process bypassing the sending application and any authentication steps the sending application would use. In this case, DocuSign recommends that one of the normal DocuSign authentication features (Access Code, Phone Authentication, SMS Authentication, etc.) be used to verify the identity of the recipient.

## Service Pack Bug Fixes

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The following bug fixes were deployed to the DocuSign Production environment as part of October 3, 2014 Service Pack. The name-number is the internal DocuSign tracking number for the bug.

**Important:** Issue numbers that are **bold underlined text** are externally reported bugs or customer commitments that were fixed in the Service Pack.

- **WAPP-2755:** The fax numbers for London and Singapore appeared on the fax cover sheet after they were disabled in a customized Signing Resource file.
- **WAPP-4170:** An extra signing email was being generated and sent after an envelope was created in the Classic DocuSign Experience web application.
- **WAPP-4214:** The selected authentication method was not honored when exporting and reimporting a template XML file in the Classic DocuSign Experience web application.
- **WAPP-4436:** In the Classic DocuSign Experience web application Document Visibility was not honored for a signer with multiple account memberships, including membership in the sending account, unless the sending account membership is set as the signer's default account.
- WAPP-4531: Incorrect branding information was shown for tool tips in DocYouSign web application Preferences – Features.
- **SIGN-4019:** For Captive Recipients (Embedded Recipients), the signing experience was not enforcing the Each Access authentication ID check for envelope access.
- **SIGN-4020:** For Captive Recipients (Embedded Recipients) using ID Check Authentication, the Next button was active before the recipient entered any information.
- **PLAT-959:** Tabs with Anchor Tab settings sent through the API were not enforcing maximum length settings.
- PLAT-1679: When using the REST API to request recipient authentication status for SMS Authentication, the status was not being returned.
- PLAT-2640: When using the REST API to access the Box cloud storage provide, the initial response returned 0 results, but subsequent request returned the correct results.
- PLAT-2671: In the REST API the Salesforce authentication status node was appearing in some in some recipient authentication status nodes when no Salesforce operations were being used.
- **PLAT-2687:** The date information was not displaying correctly on PDF version of the Certificate of Completion.
- PLAT-2705: Updated REST API documentConversionRestrictions error message so that v1 and v2 use the same message.
- **PLAT-2714:** When using the REST API to update the listTab attribute, the listItem values were being changed to be the same as the listItem text.
- PLAT-2724: After an envelope is corrected to remove a recipient, if the deleted recipient has a DocuSign account the envelope still appeared in the deleted recipient's Inbox. The deleted recipient was not able to open the envelope.
- PLAT-2727: In the REST API, a draft envelope could not be saved when setting the hostEmail information for an In-Person Signer recipient type to an email that is not associated with a DocuSign account.
- PLAT-2888: The DocuSign API was updated to enforce rules for using special characters in the Document Name and to pass an error message when this occurred. To support customer document operations outside of DocuSign, DocuSign is replacing a special character with an underscore in the Document Name.

- **PLAT-2913**: A customer administrator was receiving errors when attempting to make account changes for an account in a time zone with a 30-minute offset.
- DSP-1534: For the OpenTrust digital signature integration, updated the Company and Country information to use the sender information instead of signer information.
- DSP-1616: The incorrect URL to the OpenTrust Subscriber Agreement was being used for French - Canada and Vietnamese languages.