

Release Notes for DocuSign Winter '15 Release

This document provides information about the updates deployed to the DocuSign Production environment as part of the December 5, 2014 DocuSign Winter '15 Release.

Note: Some items listed in the Release Notes were implemented in previous monthly service packs. The month the item was implemented is given in the heading for that item. The list of features, descriptions, and other release information are updated on a regular basis until the actual release date. Be sure to check the full release notes link DocuSign web site [Upcoming Release page](#) for updates. Changes to the release notes since the previous version are shown by a change bar on the left side of the page.

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New Signing Experience Information

DocuSign has been working on significant improvements to the signing experience including improved navigation, streamlined welcome screen, responsive email notifications, and a more modern look and feel - all to make it easier and faster for your customers to sign documents.

The timeline for implementing the new and improved signing experience is:

- November 21, 2014: The new and improved signing experience is enabled for customer accounts on the DocuSign Demo environment. Customer administrators can continue to manage this setting in Preferences. Customers may begin to control the signing version for their Production account(s) in Preferences.
- November 21, 2014 to December 4, 2014: Customers have the opportunity to examine and assess the new signing experience.

Customers can turn off the new signing experience in the Classic DocuSign Experience web application by going to the Preferences – Features section and clearing the **Use DocuSign Winter '15 Signing Experience** option. Customers that have turned off the option and left it off before December 5 will be placed on an opt-out list. Additionally, customers that use Digital Certificates or are known accessibility users will automatically be placed on the opt-out list because those features are not supported in the initial release of the new signing experience.

- December 5, 2014: The new and improved signing experience is released to Production. Customers that are not on the opt-out list will be automatically transitioned to the new and improved signing experience.

After the release to Production, the new signing experience will still be available in the Demo environment. DocuSign recommends that customers who opted out of the initial deployment turn on the option in their Demo environment to evaluate the new signing experience.

- December 5, 2014 to March 6, 2015: DocuSign will only make Priority 1 bug fixes (as determined by DocuSign) to the previous signing experience. After March 6, DocuSign will not make any changes to the previous signing experience. There will be no exceptions to this.
- August 31, 2015: The previous signing experience is retired and all users will be automatically transitioned to the most recent version of the new signing experience. There will be no exceptions to this.

The new signing experience has been available in the DocuSign Demo environment since June 6, and since then, we've been collecting your feedback at: SigningFeedback@docusign.com. You've given us valuable recommendations - thank you! We want to encourage you to continue to provide feedback on the new signing experience.

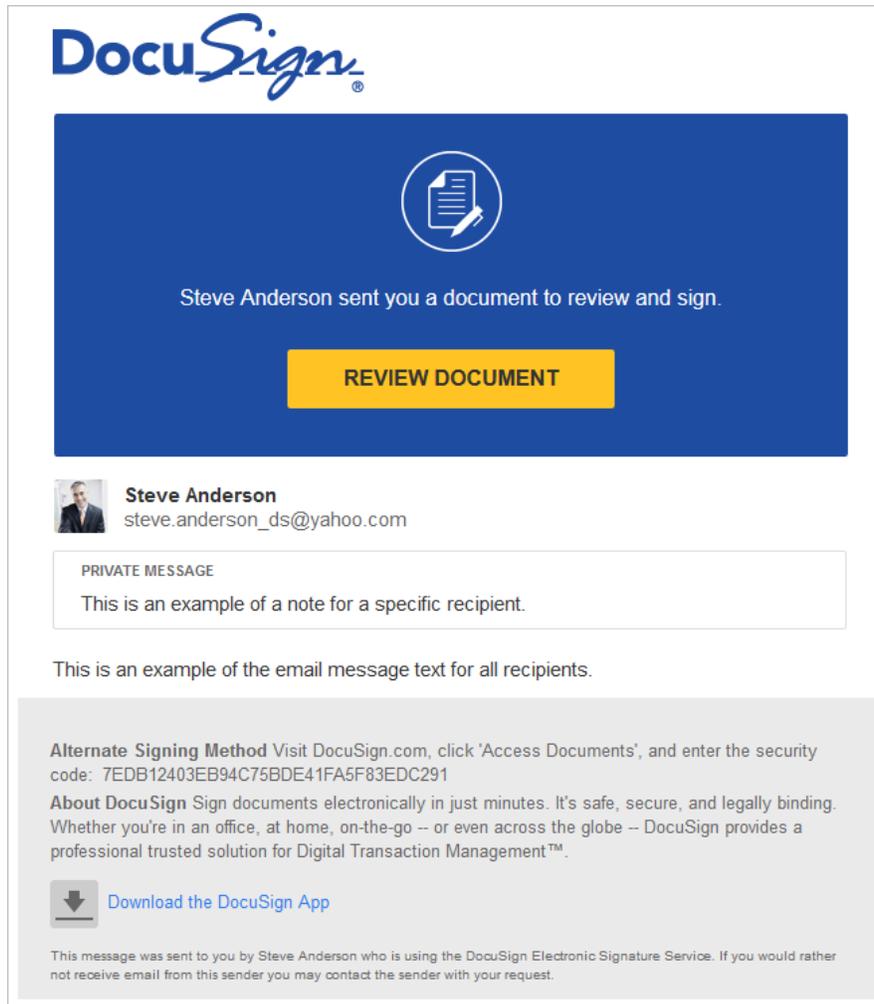
Note: The following restrictions apply to the new signing experience:

- Accessibility, Localization, and Digital Signatures have not yet been implemented in the new signing experience, but will be available before August 31, 2015.
- The new signing experience does not function with Internet Explorer version 7 or earlier. When trying to view the new signing experience with these browsers, an error message is shown to the viewer.
If you are using Internet Explorer 8 or above in Compatibility Mode, then the new signing experience interprets the browser as IE7 and will display the error message.

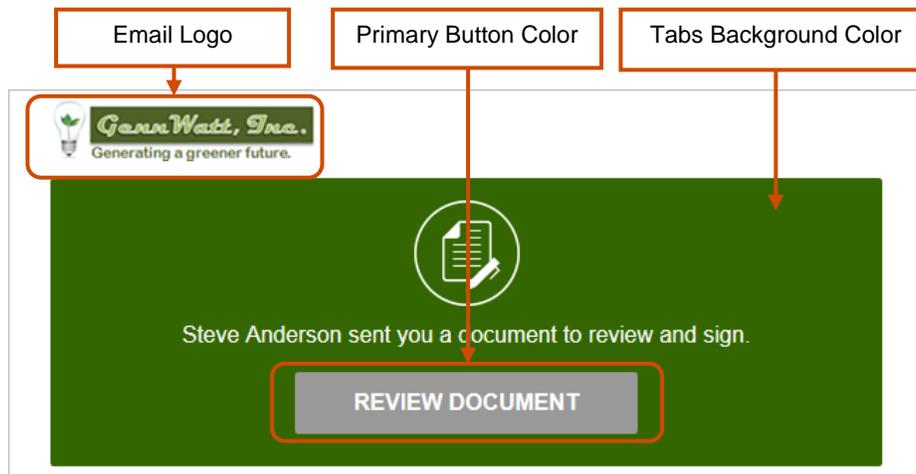
More information about the new signing experience is available in the [DocuSign New and Improved Signing Experience Information Guide](#).

New Email Information

The new and improved signing experience still starts with responsive web design email messages providing an optimal viewing experience for recipients.



The new email messages use the following Branding settings for the colors and logo.



New Email Templates

In addition to the new email design, DocuSign is adding two new email templates. Descriptions of when the new email templates are used and example email images are provided below:

- **Return Documents:** This email is used to send a copy of documents a user signed to one or more email addresses. The documents are signed and email addresses added when using the Sign It Now (Classic DocuSign Experience) or Sign a Document (New DocuSign Experience) functions in the DocuSign web application.





Your Signed Document

[VIEW DOCUMENT](#)



John Q. Sender
John.Sender@businessco.com

John Q. Sender has signed a document using DocuSign.

Jane Recipient,

Select [VIEW DOCUMENT](#) to securely view and download your documents.

This email contains a secure link to DocuSign. Please do not share this email, link, or access code with others.

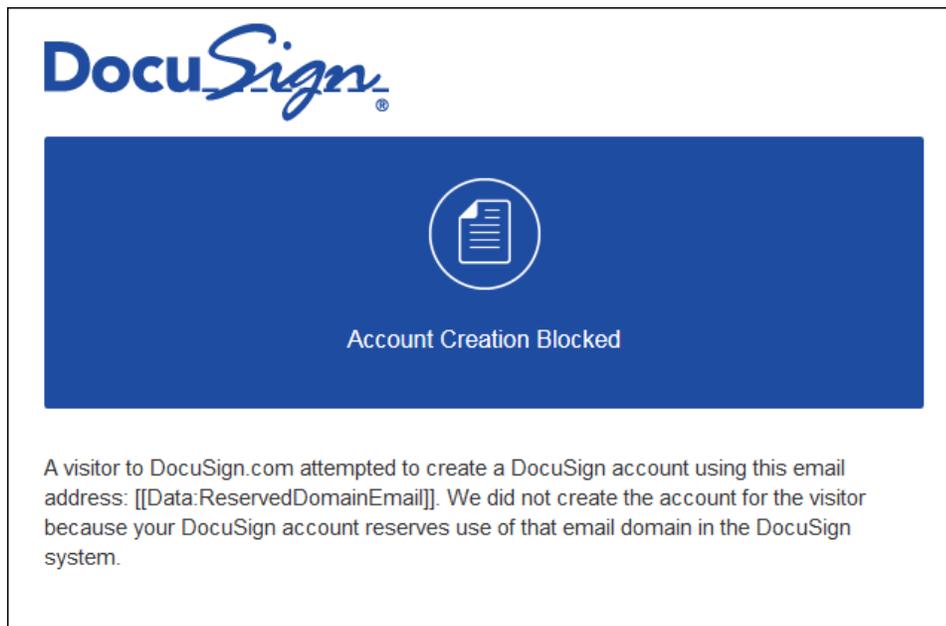
Alternate Signing Method
Visit [DocuSign.com](#), click 'Access Documents', and enter the security code:
00000000000000000000000000000000

About DocuSign
Sign documents electronically in just minutes. It's safe, secure, and legally binding. Whether you're in an office, at home, on-the-go -- or even across the globe -- DocuSign provides a professional trusted solution for Digital Transaction Management.

 [Download the DocuSign App](#)

This message was sent to you by John Q. Sender who is using the DocuSign Electronic Signature Service. If you would rather not receive email from this sender you may contact the sender with your request.

- **Reserved Domain Notification:** This email is sent to account administrators for accounts that have reserved domains enabled when someone tries to create a new account using the account's reserved domain email information.



Email Resource File Customization

If you have enabled the new signing experience and your account has resource file branding enabled, you can download the Branding email resource file with the new email templates from the Resources tab in a brand profile.

Note: If you want to download the new resource file, but do not want to leave the new signing experience enabled; you can turn on the new signing experience in your Demo account, download the resource files, and then turn off the new signing experience.

Important: If your account uses a modified Branding email resource file to customize email templates, the email template modifications in your uploaded file will continue to be used for your account. However, any emails that are sent with templates that are not included in your uploaded resource file will use the new email templates. It is important to review your current resource file and the new email resource file to ensure all your messages from your account to ensure the email templates meet your organization's needs.

More information about the email resource file is available in the [DocuSign Email Resource file Information Guide](#).

PDF Document Long-Term Validation

In the DocuSign Winter '15 Release, DocuSign has enabled long-term validation for downloaded PDF documents by including Online Certificate Status Protocol (OCSP) responses in our digital signatures. Additionally, DocuSign is replacing our expiring X.509 certificate with a new X.509 certificate.

When users download PDF documents from the DocuSign platform, DocuSign applies a tamper-evident seal by digitally signing the PDF documents with a X.509 certificate.

DocuSign uses a X.509 certificate issued by Entrust, which is part of Adobe® Certified Document Service (CDS) program and so it is automatically trusted by Adobe Reader® and Acrobat®. When the downloaded PDF documents are viewed with Adobe Reader and Acrobat, the applications check the digital seal validity and display the results in the blue bar at the top of the document. A green check mark indicates the PDF is signed and all signatures are valid.



Prior to the DocuSign Winter '15 Release, DocuSign did not have long-term validation enabled when we digitally signed PDF documents. Because of this, after our current X.509 certificate expires on December 20, 2014, Adobe Reader and Acrobat will show a yellow warning sign - instead of the green check mark - for any PDF documents downloaded prior to December 20, 2014.



The warning is shown because Reader and Acrobat can no longer verify the status of the X.509 certificate by performing via a real-time check (OCSP) or looking at the Certificate Revocation List (CRL).

To correct this, and have a green check mark shown in Reader and Acrobat, users simply need to download the PDF documents again from the DocuSign platform.

Classic DocuSign Experience Updates

New Language Setting and Email Language Logic

Users will now have their preferred language associated with them.

Customer administrators can specify the **Language** setting when new users are added to an account and when modifying existing users. The image below shows the Language setting when creating a new user; it is in the same location when modifying a user.

A screenshot of the DocuSign user creation interface. At the top, there are four tabs: "Account", "Permissions", "Address", and "Sharing". Below the tabs is a form titled "Personal Info for". The form contains several fields: "Email" (with value "john.public@openemail.com"), "Name", "Company" (with value "GenWatt, Inc."), "Job Title", "Permission Profile" (with value "-- Select --"), and "Language" (with value "English US (en)"). The "Language" field is highlighted with a red rectangular box. To the right of the "Language" field, there is a section titled "In Group(s)" with three checkboxes: "Sales (NW)", "Administrators", and "Everyone". At the bottom of the form, there is a note "(* = Required Information)". Below the form are "Save" and "Cancel" buttons.

Users can set or change their default language using the language setting at the bottom of the Classic DocuSign Experience web application.



Once the preferred language is set, emails sent from to that user will leverage the new language setting as follows:

For system-level account emails (for example, an account activation email or change password notice):

- Emails are sent in the user's set language.
- If the user language is not set, the email is sent in English – US.

For document related emails (for example, sign documents, completed documents, or carbon copy notifications):

- Emails are sent in the language selected by the sender.
- If the sender does not select a language, the email is in the user's set language.
- If the user language is not set, the email is in the sender's set language.
- If none of the above, then the email is sent in English – US.

ID Check Question Refresh Limits

This change adds the ability for customer administrators to limit the number of unique ID check question sets a recipient can get before being locked out of an envelope. This change was implemented to allow customers to better control the charges associated with ID check authentication, since an account is charged for an ID check each time an ID check question set is generated.

How it Works

For recipients that must complete ID check authentication before accessing their documents, a new ID Check question set is generated each time the recipient:

- Tries to access the documents from the link in the email notification or from the Access Documents link on the DocuSign website.
- Tries to access their documents from the recipient's DocuSign account.
- Refreshes their browser while viewing the actual ID Check questions.

If a recipient exceeds the number of unique question sets allowed by the account, the recipient is considered to have failed the ID Check and the sender is notified of the failure. The sender can resend the envelope, which will reset the recipient's question sets giving the recipient the opportunity to answer the ID check questions.

How to Change the Setting

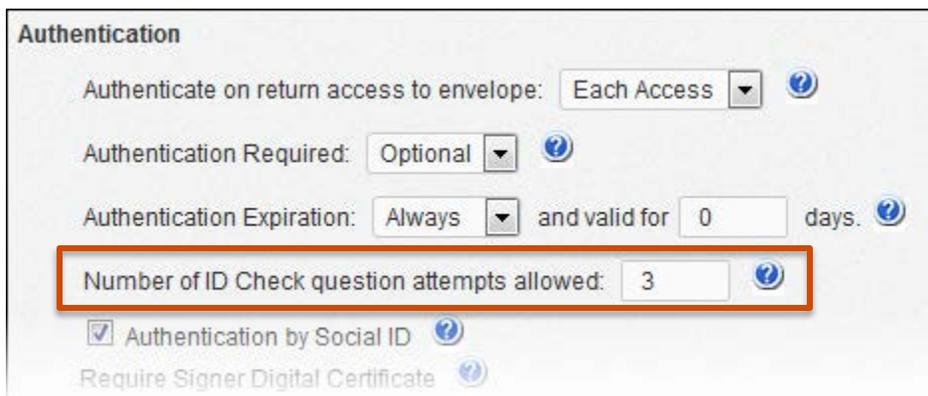
The setting for the number of ID Check question attempt can be set by a customer administrator in the Classic DocuSign Experience Preferences. The default value is 3, but can set this to any number from 1 to 255.

Note: Customers can also contact DocuSign and request that DocuSign change the setting for their account.

To change the setting:

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 section and set the **Number of ID Check question attempts allowed** value. The value can be any number from 1 to 255.

IMPORTANT: There is an additional charge for new set of questions a recipient gets.



The screenshot shows the 'Authentication' settings page. The 'Number of ID Check question attempts allowed' field is highlighted with a red box and contains the value '3'. Other settings include 'Authenticate on return access to envelope' set to 'Each Access', 'Authentication Required' set to 'Optional', and 'Authentication Expiration' set to 'Always' and valid for '0' days. There are also checkboxes for 'Authentication by Social ID' and 'Require Signer Digital Certificate'.

3. Click **Save** to save your changes.

Reminder Emails

In this release DocuSign has updated the processing used to determine when signing reminder emails are sent. With this change, the time zone used to determine when to send reminder emails is the time zone setting for your account. Previously the reminder emails were managed during overnight processing and the emails would be sent out based on U.S. Eastern and Pacific Standard Times.

Bulk Recipient Feature Sending Updates

DocuSign has updated how envelopes sent using the Bulk Recipient feature are sent and how limits are enforced.

Previously envelopes sent with a Bulk Recipient file were created and sent immediately, but only up to the hourly API limit for accounts, which was strictly enforced by the DocuSign API. This could cause delays in sending as the system waited for the limits to reset before sending more envelopes.

With the DocuSign Winter '15 Release, the Bulk Recipient envelopes are added to and sent in a metered fashion through a Bulk Recipient queue. The addition of the queue removes the need for the DocuSign API to enforce the API limits for envelopes sent using the Bulk Recipient feature.

There is a limit of 2,000 envelopes in the Bulk Recipient queue and an error message is shown to the sender if this limit is reached.

Reports Updates (added in October and November)

In response to customer demand, DocuSign added some new optional data columns to the Envelope Report and Envelope Recipient Report and released two new standard reports to the Reports Library: the Account Authentication Report, and the Envelope Authentication Report. Both new reports are accessed through the Classic DocuSign Experience web application Reports tab.

Additional Optional Report Columns (added in October)

The optional data columns being added for the Envelope Report 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.

The optional data columns being added for the Envelope Recipient Report are:

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.

New Reports (added in November)

The new reports are described below:

- Envelope Authentication Report – This report provides details for all recipients with authentication checks for the selected report parameters. Each report row is for a different recipient and shows the recipient information, authentication check information, and the result of the authentication check.

The available information columns for the Envelope Authentication Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Envelope Authentication Report Column	Description
Event Date*	The date the authentication event occurred.
Envelope ID*	The DocuSign envelope ID.
Recipient Name*	The recipient's name.
Recipient Email*	The recipient's email address.
Authentication Category*	The general authentication category for the authentication type used by the recipient. The categories and associated authentication types are: <ul style="list-style-type: none"> • Access Code = Access Code • ID Check = iAuth, iAge, iPatriot, and STAN • Phone = Phone Authentication and SMS Authentication • PKI Cert = PKI Certificate • Social ID = Google, AnySocialID, Salesforce, LinkedIn, Facebook, Live ID, Yahoo, Twitter, OpenId • WURFL = WURFL Device Detection • Other = Any non-established type
Authentication Type*	The specific type of authentication check used for the recipient. The possible values are: Access Code, AnySocialID, Facebook, Google, iAge, iAuth, iPatriot, LinkedIn, Live_ID, OpenId, PhoneAuth, PKICert, Salesforce, SMSAuth, STAN, Twitter, WURFL_DeviceDetection, and Yahoo.
Authentication Success*	The authentication result where True = passed authentication and False = failed authentication.
Sender User ID	The DocuSign ID for the sender.
Sender Name	The sender's name.
Recipient ID	The DocuSign ID for the recipient.
Recipient User ID	If the recipient is also a DocuSign user, this is the recipient's DocuSign user ID.
Vendor Return Code	The vendor's result code associated with this authentication check. Note that this is typically only populated for failed authentication checks.
Vendor Failure Reason	The vendor's failure reason associated with this authentication check. Note that this is only populated for failed authentication checks.

- Account Authentication Report – This report provides overall authentication check information for the account for the selected timeframe. The report shows the number of authentication check successes and failures for each authentication type for envelopes sent by the account.

Note: The Account Authentication Report is only available to administrators.

The available information columns for the Account Authentication Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Account Authentication Report Column	Description
Authentication Category*	The general authentication category for the authentication types. The categories and associated authentication types are: <ul style="list-style-type: none"> • Access Code = Access Code • ID Check = iAuth, iAge, iPatriot, and STAN • Phone = Phone Authentication and SMS Authentication • PKI Cert = PKI Certificate • Social ID = Google, AnySocialID, Salesforce, LinkedIn, Facebook, Live ID, Yahoo, Twitter, OpenId • WURFL = WURFL Device Detection • Other = Any non-established type
Authentication Type*	The specific type of authentication check. The possible values are: Access Code, AnySocialID, Facebook, Google, iAge, iAuth, iPatriot, LinkedIn, Live_ID, OpenId, PhoneAuth, PKICert, Salesforce, SMSAuth, STAN, Twitter, WURFL_DeviceDetection, and Yahoo.
Successes*	The number of successful authentication events.
Failures*	The number of failed authentication events.

Access Code Format Settings (added in October)

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.

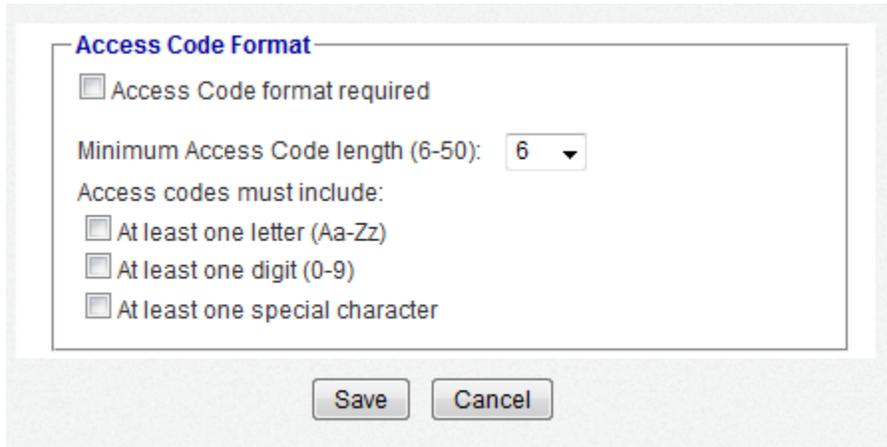
To set the Access Code Format

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:

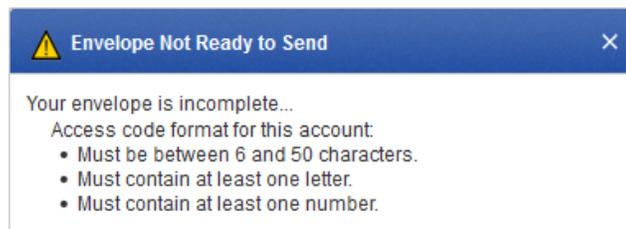


- Select **Access Code format required**.
- Select the Minimum Access Code length. This can be 6 to 50 characters.
- Optionally, select if Access Code must have at least one letter character, at least on number character, and at least one special character. Special characters are any keyboard characters 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 (added in October)

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 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.

API Changes for the DocuSign Winter '15 Release

This section provides additional information on the API changes to implement the features in the DocuSign Winter '15 Release. The following table shows a list of the features in the release that impact the DocuSign SOAP and REST APIs.

REST API Changes

New User Locale Attribute

This change adds a new user setting that sets the default language for the user. The new userSetting name is 'locale' and the associated value is the language code. The supported languages, with the language value shown in parenthesis are: Chinese Simplified (zh_CN), Dutch (nl), English US (en), French (fr), German (de), Italian (it), Japanese (ja), Korean (ko), Portuguese (pt), Portuguese (Brazil) (pt_BR), Russian (ru), Spanish - (es).

The user setting value can be set when adding (POST) a new user or modifying (PUT) user setting information and when setting the initial user when creating (POST) an account. It is also returned when retrieving (GET) user setting information.

Additional Response Information for User and Group User Requests

This change adds the user email information to the basic response when retrieving (GET) a list of account users or group users. This allows REST API users to quickly and easily get basic information identification information (User ID, name and email) about account and group users.

Previously the optional `additional_info=true` query could be added to the call so that the user email information would appear in the response. However, using this also returned additional user data and increased the size of the response.

Important Date-Time Correction Note (added in November):

As part of the November 7, 2014 Service Pack DocuSign corrected a REST API time shift bug. Previously when an incoming `dateTime` request parameter specified UTC or an offset from UTC, the system would shift the time to Pacific Time (UTC-8). When the fix is in place, the system will honor the UTC and UTC offset setting for incoming `dateTime` parameters.

Note that incoming `dateTime` request parameters that did not specify UTC or an offset were assumed to be UTC and were not changed.

Account Settings Update (added in November):

This update adds new account settings that allow an ID Check configuration to be set when creating an account or changed by users with administrator permissions.

The new account settings are described below:

Setting Name	Value	Authorization Required	Description
<code>rsaVeridAccountName</code>	String	Admin	The RSA account name.
<code>rsaVeridPassword</code>	String	Admin	The password used with the RSA account.
<code>rsaVeridRuleset</code>	String	Admin	The RSA rule set used with the account.
<code>rsaVeridUserld</code>	String	Admin	The user ID for the RSA account.

Envelope eventNotification Updates (added in November):

This update adds more settings to the `Envelope eventNotification` parameter when creating an envelope or template. The new settings are:

- `includeEnvelopeVoidReason` – When set to true, this tells the Connect Service to include the void reason, as entered by the person that voided the envelope, in the message.
- `includeDocumentFields` – When set to true, this tells the Connect Service to include the Document Fields associated with the envelope. Document Fields are optional custom name-value pairs added to documents using the API.
- `includeCertificateOfCompletion` – When set to true, this tells the Connect Service to include the Certificate of Completion with completed envelopes.

Custom Fields Note (added in November):

When sending an envelope, including when sending from one or more templates, each custom field used in the envelope must have a unique name. This is especially important to note when sending an envelope with multiple templates.

Formula Tab Update (added in October):

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 (added in October):

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 (added in October):

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

New Member Locale Attribute

This change adds a new member setting that sets the default language for the user. The new MemberSetting name is ‘Locale’ and the associated value is the language code. The supported languages, with the language value shown in parenthesis are: Chinese Simplified (zh_CN), Dutch (nl), English US (en), French (fr), German (de), Italian (it), Japanese (ja), Korean (ko), Portuguese (pt), Portuguese (Brazil) (pt_BR), Russian (ru), Spanish - (es).

The member setting value can be set when adding members to an account or updating member setting information and when setting the initial member when creating a new account.

Envelope EventNotification Updates (added in November):

This update adds more settings to the Envelope EventNotification parameter when creating and sending envelope. The new settings are:

- IncludeEnvelopeVoidReason – When set to true, this tells the Connect Service to include the void reason, as entered by the person that voided the envelope, in the message.

- IncludeDocumentFields – When set to true, this tells the Connect Service to include the Document Fields associated with the envelope. Document Fields are optional custom name-value pairs added to documents using the API.
- IncludeCertificateOfCompletion – When set to true, this tells the Connect Service to include the Certificate of Completion with completed envelopes.

Custom Fields Note (added in November):

When sending an envelope, including when sending from one or more templates, each custom field used in the envelope must have a unique name. This is especially important to note when sending an envelope with multiple templates.

Note for SenderRequired Setting (added in November):

The Tab – SenderRequired node does not function with the CreateEnvelopeFromTemplates method. If you want to send from a template that has this option enabled, you must use the CreateEnvelopeFromTemplatesAndForms method.

Recipient EmbeddedRecipientStartURL Update (added in October):

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.

Bug Fixes

DocuSign Winter '15 Release Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment as part of the DocuSign Winter '15 Release. 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 release.

- **WAPP-4295:** When using embedded sending some web application tabs remained active on the the Session Timeout page.
- **WAPP-4459:** When using the Classic DocuSign Experience web application to upload a document with numerous anchor tags, the success dialogue box extended outside of the browser's visible area, preventing users from closing the dialog.
- **WAPP-4747:** Updated the error message shown when trying to save a PowerForm where the template is missing role name information.
- **WAPP-4804:** When using the Classic DocuSign Experience web application Branding profiles with xml resource files could not be imported.
- **SIGN-4753:** When using a mobile browser for signing, initials for document markup related to changes for radio buttons were not appearing.
- **SIGN-4065:** Changing the DocuSign_IntroSuppress string in the branding signing resource file was not reflected in the signing experience.
- **PLAT-3301:** When using the Classic DocuSign Experience web application the Electronic Records and Signature Disclosure was resetting to be required after a new account user was activated.
- API-24: When using the REST API, senders were unable to resend envelopes in cases where recipient information was locked when the envelope was sent.
- API-91: When using REST API to send an envelope for in-person signing, the envelope could be sent to a host email and name that did not have a DocuSign account.
- **API-117:** When using the REST API to send envelopes with composite templates the reminder and expiration settings were being overridden by the server template or default account settings.
- API-560: When using the SOAP API RequestEnvelopeWithDocumentFields call, the retruned PDF files were not being digitally signed.
- API-561: When using the SOAP API RequestEnvelope call, the Authoritative Copy setting was always being returned as false, no matter what the actual setting was.
- **API-733:** When using the REST API to update user settings without updating a top level setting an "Unspecified Error" was being returned.
- **FS-765:** When working with a DocuSign Connect for Salesforce configuration the items in the Add selection list were being duplicated each time the Add button was clicked.

November Service Pack Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment as part of November 7, 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-3904:** In the Classic DocuSign Experience web application when the sender was also the first signer in an envelope, the "Would you like to sign your envelope now?" dialog was not being shown consistently.
- WAPP-4450: The size of "Powered by DocuSign" text and logo for Portuguese-Portugal and Portuguese-Brazil was adjusted to match other web application information.
- **WAPP-4540:** In the Classic DocuSign Experience the Password Reset user interface was causing confusion when a user was on the log on page for one DocuSign server and their account was on a different DocuSign server.
- **WAPP-4642:** In the Classic DocuSign Experience when two unique users (with different user names) used the same email address and password, they were prevented from access the system.
- **WAPP-4655:** In the Classic DocuSign Experience some templates could not be downloaded while using the Chrome browser due to the use of commas in the template name.
- **DSP-1692:** For accounts with 21 CFR Part 11 compliance enabled, the UTC label for the Signing Time was not appearing on Initials tags.
- **API-36:** When using the REST API to retrieve shared templates, the response only returned templates that were explicitly shared with the account member, even when the account member had administrator privileges and the results should have returned all account templates.
- API-44: When using the SOAP API CreateEnvelopeFromTemplate method, the Tab - SenderRequired setting not was not being enforced.
- API-142: When using the REST API and sending a dateTime request parameter that specified UTC, the system would shift the time to Pacific Time (UTC-8). There is an expanded description of this fix in the [REST API Changes section](#) of this document.
- API-156: When using the REST API to access the Box cloud storage provider, the initial response returned 0 results, but a subsequent request returned the correct results.
- API-207: When using the REST API to select Dropbox as a documentation source, a blank browser window was shown instead of the Dropbox interface.
- **API-214:** When using the SOAP API to update address book items, the response contained duplicate entries for the newly added items.
- API-233: When using the SOAP and REST APIs to send with composite templates, new event notifications were not being created in the Connect logs.
- **API-242:** When using the SOAP or REST API setting Shared Access for envelope folders failed if the account member being shared with had an ActivationSent status.
- **API-250:** When using the REST API to Correct Recipient Information for an envelope where the sender is also the recipient and the recipient information is changed, the Inbox folder view did not update to show the change.

- API-302: When using the REST API to correct recipient information multiple copies of the corrected envelope were shown in the Sent folder for the Classic DocuSign Experience web application. This is related to API-250.
- API-305: When using the SOAP or REST API to download combined documents if the request does not specify to include the certificate of completion, then the account setting for this option is used.
- **API-372**: Added new settings to the SOAP and REST API Envelope – Event Notification parameter for use when creating an envelope or template. The new settings are described in the [SOAP](#) and [REST](#) API Changes section of this document.
- API-382: Added new account settings to allow ID Check configurations to be set when creating an account using the REST API.
- **API-401**: When using the SOAP or REST APIs purge documents was not working if documents were marked as authoritative copy, even after the documents were successfully exporting to another location.
- API-441: Added new account settings to allow ID Check configurations to be changed after account creation when using the REST API.
- API-566: When using the REST API, envelopes sent with different Custom Fields that used the same name were causing errors and would not be returned by the system.
- **API-573**: When using the REST API to send an envelope from a template an error message was received if the template was in a shared folder for the sender and the template is not specifically shared with the sender.
- **PLAT-2442**: Envelopes sent to cross-site accounts were being routed to closed accounts when the recipient had a closed account and their open account was not set as the default account.
- **PLAT-2715**: When using the REST API to GET Envelope Audit Events did not return the correct time zone in the response. This is related to API-142.
- PLAT-2838: Member activation emails were being incorrectly sent to members for some account plan Distributor Codes, even though the default setting was to suppress the activation emails.
- PLAT-3186: Users could not open and sign envelopes when they have open default accounts on two DocuSign servers.

October Service Pack Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment on 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.