

Service Pack Notes for February 6, 2015

This document provides information about the updates deployed to the DocuSign Production environment as part of February 6, 2015 Service Pack. There are four sections in the Service Pack Notes:

- [New Signing Experience Updates](#)
- [Authentication ID Check Improvement](#)
- [Classic DocuSign Experience Document Retention Option Update](#)
- API Changes for the [REST API](#)
- [Service Pack Bug Fixes](#)

These notes have been updated since the Service Pack was deployed to the DEMO environment with the addition of the Service Pack Bug Fixes WAPP-4922, WAPP-4936, WAPP-4942, SIGN-5054, SIGN-5261, API-11, and API-852. Changes are shown by change bars on the left side of the page.

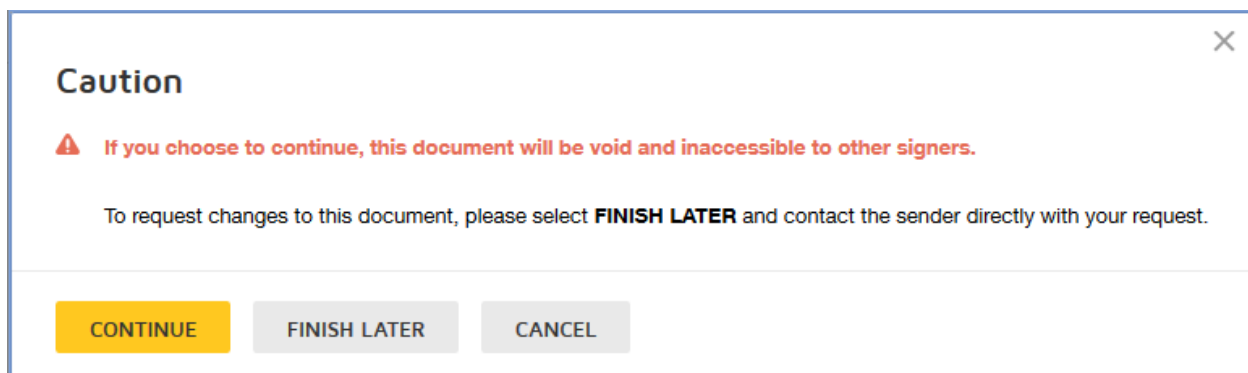
* - Feb 7, 2015 Update: The [Authentication ID Check Improvements](#) was initially deployed with the February Service Pack, but was reverted to the previous settings due to customer concerns.

New Signing Experience Updates

As part of the continuing improvements for the new signing experience, DocuSign has added the following changes as part of February 6, 2015 Service Pack. These changes only apply to the new signing experience.

Decline Warning

This change adds a new warning dialog that provides additional information to signers about the action they are about to take when selecting the **DECLINE TO SIGN** option from the Other Actions menu.



If the signer clicks **CONTINUE**, then they follow the normal Decline to Sign actions for your account. Clicking **FINISH LATER** closes the signing experience, saving any information the signer might have entered. Clicking **CANCEL** returns the signer to the signing experience.

Note: The text in the warning dialog can be modified in the signing resource file.

Disabling Return by Fax

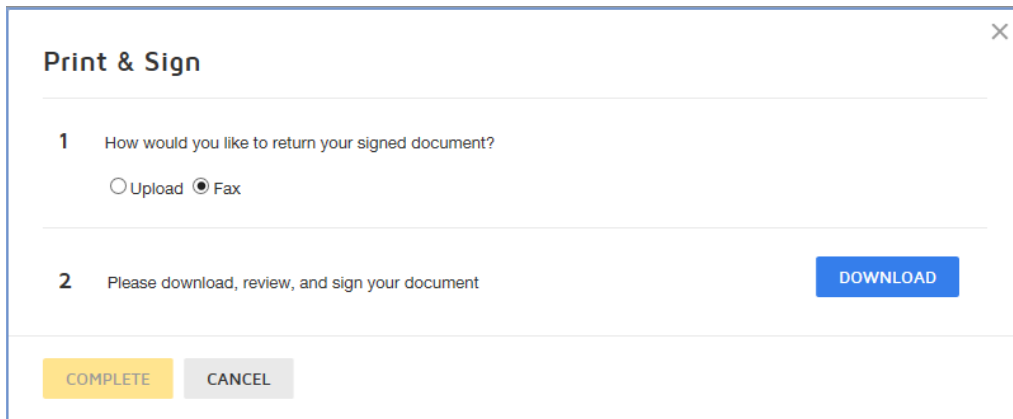
This change allows customers that use signing resource file branding to disable the fax option for the Printing & Sign option and for returning signer attachments, requiring signers to upload their documents and attachments.

Note: You must have resource file branding enabled for your account to change these options.

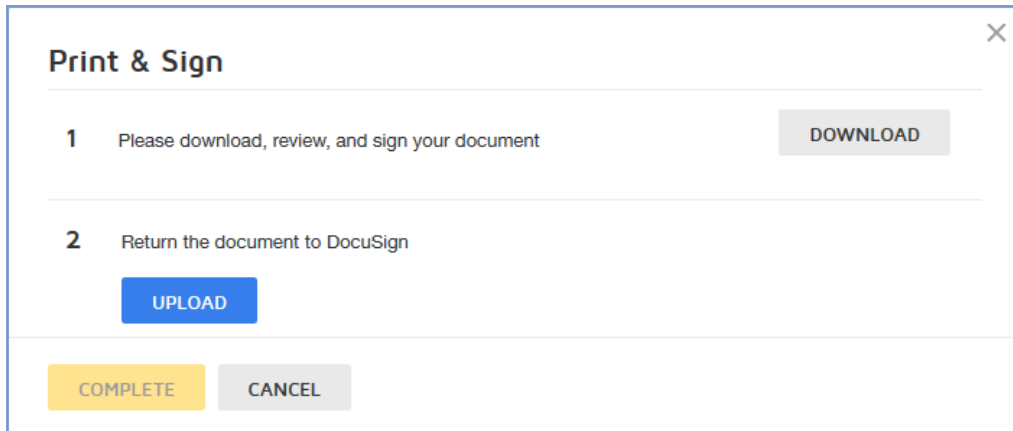
The fax options are controlled by the following lines in the DocuSign signing resource file:

- DocuSign_FaxAllowForSignOnPaper
- DocuSign_FaxAllowForAttachment

When **DocuSign_FaxAllowForSignOnPaper** is set to **false** in the brand profile signing resource file, the text discussing faxing documents back is removed from the print and sign option and uploading is the only available method of returning documents.

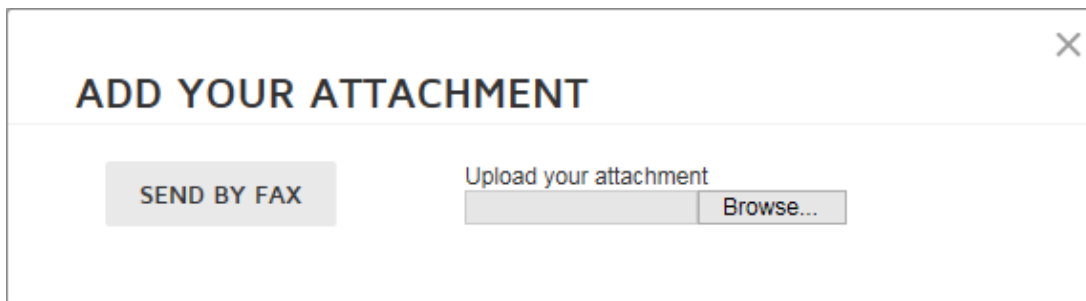


Print & Sign dialog – fax available

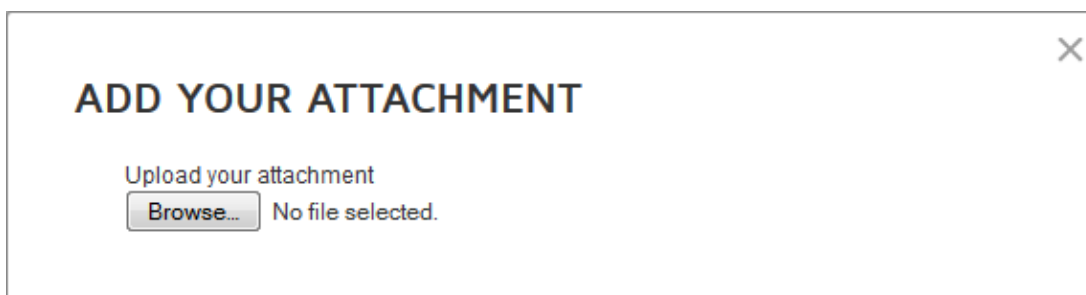


Print & Sign dialog – fax disabled

When **DocuSign_FaxAllowForAttachment** is set to **false** in the brand profile signing resource file, the fax option, and subsequent fax dialogs, is removed for returning signer attachments.



Add your Attachment dialog – fax available



Add your Attachment dialog – fax disabled

Authentication ID Check Improvements

Important: This change was initially deployed with the February Service Pack, but was reverted to the previous settings due to customer concerns. DocuSign will revisit this change sometime in the future.

~~DocuSign has worked with our partners to refine the strength of ID Check process by reducing the amount time signers have to answer questions and improving the validity of questions asked.~~

~~If your account currently has a custom ID Check configuration, there will be no change to the configuration. If you are using a custom ID check configuration and would prefer to use the new default process, please contact your Account Manager or Customer Support.~~

Classic DocuSign Experience Document Retention Update

This update adds the option to remove additional information from the DocuSign system when documents are deleted.

This setting can be enabled in the Classic DocuSign Experience by clicking your profile image in the upper right and selecting **Preferences**. In the navigation pane on the left side of the page, under the Account Administration heading, click **Features**. Under the Manage Account section, click the **Document Retention** link to go to the Document Retention Settings page.

The screenshot shows a dialog box titled "Document Retention Settings". It contains a text input field for "Number of days to retain documents from completed envelopes: (Leave blank to retain documents indefinitely)". Below this is a checkbox labeled "Remove meta data, including DocuSign fields, attachments, etc.". At the bottom of the dialog are two buttons: "Next" and "Cancel".

When a document retention setting is set and the **Remove meta data** option is selected, DocuSign will delete the original envelope documents, any fields that were added to the documents, and any attachments that were added to the envelope from the system. When a document retention setting is set and the option is not selected, then DocuSign only deletes the original envelope documents from the system.

When the retention date setting is reached, the envelope documents and, if selected, the envelope meta data are placed in a purge queue for deletion in 14 days. A warning email notification is sent to the sender and recipients associated with the envelope notifying them that the envelope document will be deleted in 14 days and providing a link to the documents. Another email is sent 7 days later with the same message. At the end of the 14-day period, the envelope documents and, if selected, the envelope meta data are deleted from the system.

API Changes

The following API changes were deployed to the DocuSign DEMO environment as part of February 6, 2015 Service Pack.

REST API Changes

Envelope and Template Locking

This change adds the ability to lock an envelope or template for editing to prevent other users or recipients from accessing and changing the envelope or template. Locking is the first phase in expanding the envelope correct mechanisms. Draft envelopes, sent envelopes, and templates can all be locked.

Note: API users are not required to use the new lock functionality. It is completely optional and current customer applications will continue to function as-is. If API users want to apply a set of edits on an envelope or template, the lock function simply enables them to do so without concern that other users can also be making changes to the envelope or template.

The general workflow for envelope or template locking through the REST API is:

1. Determine if envelope locking capability is available for the user. This is done by checking to see if the user setting 'canLockEnvelopes' is true for the user.
2. The user locks the envelope for editing using a POST. Draft envelopes, sent envelopes, and templates can all be locked for editing. While the envelope/template is locked, other users and recipients cannot access the envelope/template and are presented with a message, in the appropriate environment, stating that the envelope is locked. The image below shows an

example envelope lock message when viewing the envelope summary in the Classic DocuSign Experience web application.

The screenshot shows a web interface with two tabs: 'Summary' (active) and 'Document'. Below the tabs, the 'Envelope Status' is 'In Process'. A red box highlights the text 'Envelope locked for editing by: Laurel Lemans in Laurels Postman'. Below this, the 'Envelope Subject' is 'Test Document to Correct' and 'Pages: 1'. A list of items follows: 1. Sent by Laurel Lemans (laurel.lemans@docusign.com) | 1/20/2015 9:35:27 PM PT, and 2. Next to sign Laurel Gmail (laurel.docustage@gmail.com).

3. The user takes the lock token from the POST lock response and creates an X-DocuSign-Edit header.
4. The X-DocuSign-Edit header is added to all subsequent envelope/template calls (and their constituent parts) to show that the caller is the owner of the lock.
5. If the user is not actively editing the envelope and wants to extend the lock, the user can update the lock duration using a PUT.
6. When the user has finished editing, they use a DELETE to remove the lock.

The added calls for envelope/template locking are:

- POST /accounts/{accountId}/envelopes/{envelopeId}/lock

This locks the envelope or template and sets the time until the lock expires.

Note: When locking a template, the templateId is used in place of the envelopeId.

Name	Reqd?	Type	Description
lockDurationInSeconds	No	String	Optional setting to set the time, in seconds, until the lock expires when there is no activity on the envelope. If no value is entered, then the default value of 300 seconds is used. The maximum value is 1,800 seconds. The lock duration can be extended.
lockType	Yes	String	The type of lock being set. The accepted value is: edit
useScratchPad	No	Boolean	Reserved for future use. Optional setting that shows if a scratchpad is used for editing information.
lockedByApp	No	String	Optional setting that provides an easily understood name of the application that is locking the envelope.

Example Request

```
POST https://{server}/restapi/{apiVersion}/accounts/{accountId}/envelopes/
{envelopeId}/lock

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Passwor
d><IntegratorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json

{
  "lockDurationInSeconds": "string",
  "lockType": "string",
  "useScratchPad": "boolean",
  "lockedbyApp": "string"
}
```

Example Response

The response returns the lock information and a lock token that is used to in the X-DocuSign-Edit header to access and make changes to the locked envelope.

```
{
  "lockedByUser": {
    "userName": "string",
    "email": "string",
    "userId": "string"
  },
  "lockedByApp": "string",
  "lockedUntilDateTime": "dateTime",
  "lockDurationInSeconds": "string",
  "lockType": "string",
  "useScratchPad": "boolean",
  "token": "string"
}
```

The X-DocuSign-Edit header must be included in all subsequent envelope or template calls to show the user is the owner of the envelope lock. The header structure is:

```
X-DocuSign-Edit = <DocuSignEdit><LockToken>{token from response}
</LockToken><LockDurationInSeconds>600</LockDurationInSeconds></DocuSignEdit>
```

- PUT /accounts/{accountId}/envelopes/{envelopeId}/lock

This is used to extend the lock duration time or update the lockedByApp information. The user and integrator key must match the lockByUser user and integrator key information and the X-DocuSign-Edit header must be included or an error will be generated.

Example Request

```
PUT https://{server}/restapi/{apiVersion}/accounts/{accountId}/envelopes/
{envelopeId}/lock
```

```

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><IntegratorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json

X-DocuSign-Edit = <DocuSignEdit><LockToken>{token from response}
</LockToken><LockDurationInSeconds>600</LockDurationInSeconds></DocuSignEdit>

{
  "lockDurationInSeconds": "string",
  "lockedbyApp": "string"
}

```

The response returns the same information as a POST.

- GET /accounts/{accountId}/envelopes/{envelopeId}/lock

This returns general information about the envelope lock. If the call is made by the lockedByUser and the request has the same integrator key as original, then the X-DocuSign-Edit header and additional lock information is included in the response. This allows users to recover a lost editing session token and the X-DocuSign-Edit header.

Example Response (standard)

```

{
  "lockedByUser": {
    "userName": "string",
    "email": "string",
    "userId": "string"
  },
  "lockedByApp": "string",
  "lockedUntilDateTime": "dateTime",
  "lockType": "string"
}

```

Example Response (for lockedByUser)

```

X-DocuSign-Edit: {"token": "token_string", "lockDurationInSeconds": "string"}
{
  "lockedByUser": {
    "userName": "string",
    "email": "string",
    "userId": "string"
  },
  "lockedByApp": "string",
  "lockedUntilDateTime": "dateTime",
  "lockDurationInSeconds": "string",
  "lockType": "string",
  "useScratchPad": "boolean",
}

```

```

"token": "string"
}

```

- DELETE /accounts/{accountId}/envelopes/{envelopeId}/lock

This removes the lock from the envelope or template. The X-DocuSign-Edit header must be included in the request. Additionally, an optional query string can be added to the request to resend the envelope.

Name	Reqd?	Type	Description
resend_envelope	No	Boolean	Optional setting, when true the envelope is sent to all recipients in the current routing order.

Example Request

```

DELETE https://{server}/restapi/{apiVersion}/accounts/{accountId}/envelopes/
{envelopeId}/lock?resend_envelope=true

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Passwor
d><IntegratorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json

X-DocuSign-Edit = <DocuSignEdit><LockToken>{token from response}
</LockToken><LockDurationInSeconds>600</LockDurationInSeconds></DocuSignEdit>

```

Additional Response Information for Envelope Templates

This change adds an optional query parameter that, when set, will return template matching information in the response when retrieving (GET) the list of templates in an envelope.

Name	Reqd?	Type	Description
include	No	String	The possible values are: <ul style="list-style-type: none"> • matching_applied – This returns template matching information for the template.

An example response, with include=matching_applied, is shown below.

Example Response

```

{
  "templates": [
    {
      "templateId": "string",
      "name": "string",
      "documentId": "string",
      "documentName": "string",

```



```

    "applied": "string",
    "templateMatch": {
      "matchPercentage": "string",
      "documentStartPage": "string",
      "documentEndPage": "string"
    },
    "uri": "string"
  }
]
}

```

Account Settings Updates

This change adds two accountSettings:

Setting Name	Value	Authorization Required	Description
allowSharedTabs	Boolean	Admin	When true, the account allows users to share custom tags (fields). Note: This setting is only shown when getting account settings. It cannot be modified.
phoneAuthRecipientMayProvide PhoneNumber	Boolean	Admin	When true, senders can select to allow the recipient to provide a phone number for the Phone Authentication process.

Service Pack Bug Fixes

The following bug fixes were deployed to the DocuSign DEMO environment as part of February 6, 2015 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-4784:** When using the Classic DocuSign Experience web application to send documents from Box, some javascript code was being displayed when an envelope was being sent.
- WAPP-4862: Subject and Email merge fields were not working for some distributor plans.
- **WAPP-4866:** An administrative setting was incorrectly preventing customer administrators from importing templates.
- **WAPP-4901:** When using the Classic DocuSign Experience web application bulk recipient feature with an Internet Explorer browser the bulk recipient CSV file failed to load when creating or editing an envelope.

- **WAPP-4912:** When using the Classic DocuSign Experience web application bulk recipient feature to send from a template, the bulk recipient routing order changed after reassigning tags and changing routing order.
- **WAPP-4922:** When using the Classic DocuSign Experience web application bulk recipient feature with a template, users were getting system errors when clicking the Bulk Recipient icon.
- **WAPP-4936:** A user with membership in multiple accounts was unable to use the bulk recipient feature in an account where the feature was enabled if the feature was disabled in the user's default account.
- **WAPP-4942:** When using the Classic DocuSign Experience web application bulk recipient feature with a template, tags were being removed after envelopes were sent.
- **SIGN-2479:** When signing using a mobile browser on a Windows Phone the signing pages were not loading correctly and could not be scrolled.
- **SIGN-5054:** When using the Brand profile signing resource file to set brand color information, users were unable to change the header font color.
- **SIGN-5160:** When using the new signing experience with an Internet Explorer 8 browser the documents were being shown in a separate window that prevented signing.
- **SIGN-5201:** When using free-form signing with a Chrome browser the signer could not select tags to complete the signing process.
- **SIGN-5261:** Email messages where the recipient language was set to Korean were not fully localized.
- **API-11:** When using the REST API (v2) to add a radio button group in a composite template with a radio button selected, the set radio button selection was not being shown in the signing interface.
- **API-125:** When using the REST API (v2) to retrieve documents for an envelope marked as Authoritative Copy, the Envelope ID stamp was not being shown on the document PDFs.
- **API-192:** When using the REST API (v2) tags could not be added to added to an in-process envelope for a recipient that has not completed the envelope.
- **API-446:** When using the REST API (v2) recipients could not be changed from remote to embedded (captive) and vice-versa.
- **API-852:** When using the REST API (v2) to add multiple radio button groups and one radio button group is uses another as a conditional tag, the set radio button selection was not being shown and the conditional radio button group was not being shown.
- **API-906:** When using the Classic DocuSign Experience web application bulk recipient feature, if the bulk recipient was not the first recipient in the routing order an "envelope creation has been cancelled" error was being generated, but the envelopes were being sent correctly.
- **API-939:** When using the REST API (v2) to retrieve envelope information the results of an SMS Authentication check were not being included in the response.
- **API-1007:** When using the REST API (v2) to add phone numbers for SMS authentication in a composite template, the phone numbers were not being shown in the SMS authentication signing interface.
- **API-1094:** When using the bulk send feature in the Classic DocuSign Experience web application, the New DocuSign Experience web application, and the REST API, error messages

were being generated and sending prevented if a CSV file field entry exceeded 100 characters in length.