Release Notes for DocuSign Fall '14 Release

This document provides information about the updates deployed to the DocuSign Production environment on September 5, 2014 as part of the DocuSign Fall '14 Release.

> **Note:** 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.

Contents

Classic DocuSign Experience Updates

Reports Updates

In response to customer demand, we are adding additional optional data columns to the Envelope Report and Envelope Recipient Report. We are also adding two new standard reports to the Reports Library: the Account Authentication Report, and the Envelope Authentication Report.

- The additional data columns for the Envelope Report and the Envelope Recipient Report are expected to be available in October. The optional data columns being added are:

Envelope Report:	Envelope Recipient Report:
Sender Company Name	Signed On Paper
Date Delivered	Signed on Mobile
Signer List	Sender IP Address
Voided Reason	Envelope Voided Reason
EOD Transaction Name	
EOD Status	
Sender Job Title	
Sender IP Address	
Expiration Date	
Date Signed	

- The new Account Authentication Report and Envelope Authentication Report are expected to be available in November.

OpenTrust Digital Signatures Support Update

With the DocuSign Fall '14 Release DocuSign is updating the authentication requirements associated with the OpenTrust digital signature.

When requiring an OpenTrust digital signature, you must include a second authentication option (Access Code or SMS Authentication) for the signer. You cannot send the envelope until an option is set.

DocuSign for Life Sciences

We have partnered with industry experts to validate DocuSign's ability to deliver transactions which meet FDA regulations. DocuSign 21 CFR Part 11 solution includes industry-designed capabilities that include:

- Pre-packaged account configuration
- Signature-level credentialing
- Signature-level Signing Reason
- Signature manifestation (Name, Day, and Reason)
- Authentication options including SAFE digital signature
- Tamper-proof with full audit trail

More information about this solution will be available soon.

Portuguese Language Update

Starting with the DocuSign Fall '14 release, sending and signing functionality for Portuguese language web users will be available under the product name 'DocYouSign'. The DocYouSign web application is visually similar and functionally identical to the Classic DocuSign Experience, and both run on the same underlying DocuSign platform.

This name update is reflected in the in-product branding and system-generated email communications. This is the default functionality and naming for Portuguese users and can be controlled by changing your language settings.

Calculated Fields Update (August)

This change was added to the Classic DocuSign Experience as part of the August Service Pack. DocuSign has removed the restriction that a formula tag cannot be a parent or child conditional field and that a reference tag cannot be a child conditional field.

Bulk Sending File Documentation Update (August)

This change was added to the Classic DocuSign Experience documentation as part of the August Service Pack. When creating a bulk sending file where a recipient will use SMS authentication, the value **SMS** must be used in the Identification column. This is an exception to the normal case where the Identification value must match the information that appears in the Identity Check list for your account.

API Request Logging (July)

This change was added to the Classic DocuSign Experience as part of the July Service Pack. This feature enables users to capture API requests and, when available, responses to assist with troubleshooting REST and SOAP API issues.

The **Enable API Request Logging** option was added to user Permission settings and can be turned on for individual users. When enabled SOAP or REST API requests and responses for the user are added to a log. There are two buttons associated with this option, one to download a zip file of the log and another to clear the current log entries. A log can have a list of up to 50 requests/responses with the current number shown to the right of the buttons. Logging is automatically disabled when the log limit of 50 is reached. Private information, such as passwords and integrator key information, which is normally located in the call header is omitted from the request/response log.

> **Note:** Responses for SOAP requests are not included in the logs. This is a known limitation of the option.

☑ Sequential Signing (API) ❷
☑ Enable API Request Logging ❷

| Download API Request Logs | Clear API Request Logs | (0 of 50 used.) |

Advanced

Signing Experience Enhancements Update

As you know, we're 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.

These enhancements have been available in your 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! You've also told us you'd like additional time to test the enhancements in your Demo environment. **Based on your feedback, we've decided to move the release date for the new Signing Experience to December 5, and will be delivering it to your Production environment as part of the DocuSign Winter '15 Release.** The new Signing Experience will continue to be available in Demo during that time - and we hope you'll take advantage of the additional time to try it out. More information about the enhancements is available in the DocuSign Signing Experience Enhancements Guide.

Once released in Production on December 5, customers will be automatically transitioned to the new Signing Experience, unless the customer administrator turns it off. Customer administrators will be able to select the **Use DocuSign Winter '15 Signing Experience** option in the Classic DocuSign Experience in Preferences - Features.

For customers using Branding signing resource file customizations, this release will maintain backward compatibility with your existing resource files. However, we will be retiring some resource file nodes that no longer apply in the enhanced signing experience and adding new strings. We recommend you analyze your resource file branding customizations in Demo prior to December 5 to ensure the experience meets your organization¹s needs.

The timeline for the signing experience implementation is:

- June 6, 2014: The signing experience enhancements are available on the DocuSign Demo environment.

- December 5, 2014: The signing experience enhancements release to Production. Customers will be automatically transitioned to the enhanced signing experience, unless the customer administrator turns it off.

- December 5, 2014 to March 6, 2015: DocuSign will only make Priority 1 bug fixes (as determined by DocuSign) to the current signing experience. After March 6, DocuSign will not make any changes to the current signing experience; there will be no exceptions to this.

- August 31, 2015: Current signing experience is retired and all users will be automatically transitioned to the most recent version of the signing experience, there will be no exceptions to this.

DocuSign Mobile App Updates

DocuSign for iOS

The award-winning DocuSign iOS app will receive a major document management update. Users can easily access comprehensive document routing and document status information, remind recipients that they have a document to sign, and quickly void documents out for signature.

Launching alongside Apple's release of iOS 8, we will fully support iOS 8 and be introducing several new innovative iOS 8 features designed to delight users and developers alike. We will also be introducing two new security features for the iOS app, session timeout and hiding contents when in the multitasking view. Finally, we will be introducing the ability to log in to the iOS app using your Office 365 credentials. Estimated availability is September.

DocuSign for Android

The DocuSign Android app features an all-new homepage, providing real time status of and access to documents, as well as one-tap access to common tasks like creating your signature.

With the next major release, Android users will see a major update to the Sign & Send functionality in the app. In addition to a design and usability update, we will be adding the ability for users to add fields to documents for others to sign. Estimated availability is September.

DocuSign for Phone and Windows 8

Windows 8 and Windows Phone will both receive updates to support login via Office 365 credentials, as well as continued performance improvements.

API Changes for the DocuSign Fall '14 Release

This section provides addition information on the API changes to implement the features in the DocuSign Fall '14 Release. The following table shows a list of the features in the release that impact the DocuSign SOAP and REST APIs.

REST API Changes

OpenTrust Digital Signature Support through the REST API

This change adds "open_trust" to the list of possible values for the In Person Signers and Signers Recipient types requireSignerCertificate node.

> **Important:** OpenTrust digital signatures require two-factor authentication for signers. When sending with OpenTrust you must include a second authentication option (Access Code or SMS Authentication) for the signer.

Additionally, the allowOpenTrustSignerCertificate node was added to the accountSettings. This must be set to true to allow senders to use the OpenTrust digital signatures.

Sender Required Fields for Template Tabs

This adds the ability for template creators to mark Text and List tabs in the template as requiring sender input before an envelope using the template can be sent. This change can only be used through the API.

This change adds a senderRequired node to textTab and listTab. When this value is set to true for a tab in a template, the sender must populate the tab before an envelope can be sent using the template.

The senderRequired value for a tab can be changed by modifying (PUT) the template.

Tabs with a senderRequired value of true cannot be deleted from an envelope.

Account Settings Changes

Two nodes have been added to the accountSettings:

- allowOpenTrustSignerCertificate: when set to true senders are allowed to use the OpenTrust digital signatures.
- mobileSessionTimeout: Sets the amount of idle activity time, in minutes, before a mobile user is automatically logged out of the system. The default value is 20 minutes but can be set to be 1 to 120 minutes.

SOAP API Changes

OpenTrust Digital Signature Support through the SOAP API

This change adds "OpenTrust" to the list of possible values for the Recipient - RequireSignerCertificate node.

> **Important:** OpenTrust digital signatures require two-factor authentication for signers. When sending with OpenTrust you must include a second authentication option (Access Code or SMS Authentication) for the signer.

Sender Required Fields for Template Tabs

This adds the ability for template creators to mark Text and List tabs in the template as requiring sender input before an envelope using the template can be sent. This change can only be used through the API.

This change adds a SenderRequired node to Tab. When this value is set to true for a tab in a template, the sender must populate the tab before an envelope can be sent using the template. The value is only checked if the Tab – CustomTabType is List or Text.

Bug Fixes

DocuSign Fall'14 Release Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment on September 5, 2014 as part of the DocuSign Fall '14 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-3922:** Adding recipients to envelopes was taking too long for DocuSign for Salesforce accounts due to expired token for Connect.

- **WAPP-4161:** Templates downloaded from the Classic DocuSign Experience DEMO environment were not including the template IDR settings.

- **WAPP-4301:** Fixed a Classic DocuSign Experience issue where a new account user's membership was incorrectly merged with an existing account member.

- PLAT-1679: When getting recipient information through the REST API the recipient authentication status was not being returned for SMS authentication.

- **PLAT-2226**: Document Fields were missing when envelope was sent. This issue is related to PLAT-2592.

- **PLAT-2262:** The SOAP API PublishConnectFailures was not republishing Connect posts.

- PLAT-2552: Password reset emails were not correctly showing forgotten password questions.

- PLAT-2592: Draft envelopes with Document Fields created in the SOAP API had the Document Fields removed if the draft envelope was opened and sent through the Classic DocuSign Experience. Note, if the draft envelope was sent through the SOAP API, the Document Fields were not removed. This issue is related to PLAT-2226.

- PLAT-2626: Updates sent through the REST API for in person signer information (inPersonSigner, hostName, and signerName in the Signers Recipient Type) were not being saved correctly.

- PLAT-2641: Envelopes could be sent through the REST API for in person signing with a blank signer name (signerName in the Signers Recipient Type). The REST API now generates and error in this case.

- **PLAT-2695:** Updating recipient information through the REST API was removing the client ID for embedded signers.

August Service Pack Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment as part of August 4, 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-3681:** Corrected a Classic DocuSign Experience issue where some imported PDF form fields were not imported correctly.
- **WAPP-4126:** Corrected a Classic DocuSign Experience issue where the Document Visibility Grid was showing incorrect view permissions.
- **SIGN-3529:** Corrected an issue where the 'Not on a mobile device' link was missing from the mobile log on page.
- **SIGN-3772:** Corrected a Classic DocuSign Experience issue where new users received an error when trying to activate their account for cases where one forgotten password security question was required and the user language is French or French (Canada).
- **SIGN-3864:** Added the ability to print PDF documents from iPad and Android tablets by setting the DocuSign_SigningAllowPrint_Tablet string in the signing resource file to true.
- **PLAT-660:** Corrected a document conversion issue where PDF text was not being imported correctly.
- **PLAT-1031:** Corrected a REST API issue where when modifying a Tab values for nodes not included in the request were reverting to default values.
- PLAT-2098: In the REST API added signerEmail to the inPersonSigner Recipient Type.
- **PLAT-2168:** Corrected an API issue where some PDF form fields were not correctly converting to DocuSign tabs for PDFs created with certain PDF applications.
- PLAT-2308: Corrected a REST API issue where the buttonText for a Decline Tab could not be changed.
- PLAT-2399: In the REST API exposed name value for Notes Tab.
- **PLAT-2439:** Corrected a REST API issue where recipient ID was being incorrectly re-used when a new recipient was added and placed in a routing order before the original recipients.
- **PLAT-2534:** Corrected an issue where a sender could not use an existing signer email address with a different signer name if the signer had a DocuSign account and the sender's account resided on a different server.

July Service Pack Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment on as part of July 8, 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-817: Corrected a translation issue in the Classic DocuSign Experience where the word Fax was not changing consistently when switching between a Fax and Email delivery method.
- **WAPP-2406:** Corrected an issue with Connect where users could not access Connect configuration settings when browser language was set to French or Italian.

- **WAPP-2762:** Corrected an issue in the Classic DocuSign Experience where Signature tag shifting on a document. This is related to WAPP-4006.
- **WAPP-3223:** Corrected an issue in the Classic DocuSign Experience for automatic transfer rules where an envelope became disassociated with an account for the case where the sender of envelope was also the user the envelope was transferred to, using an automatic transfer rule.
- **WAPP-3318:** Corrected an issue in the Classic DocuSign Experience where envelope CSV files downloaded from shared Sent folder did not contain information for the Created column.
- **WAPP-3364:** Corrected an issue in the Classic DocuSign Experience where the Automatic Template Matching icons were not updating correctly.
- **WAPP-3372:** Updated the Dropbox logo image in the online documents views.
- WAPP-3532: Corrected an issue in the Classic DocuSign Experience display issue where SMS Authentication text was overlapping in envelope History view.
- **WAPP-3663:** Corrected an issue where signature images were missing from completed document PDFs.
- **WAPP-3745:** Corrected an issue in the Classic DocuSign Experience where when using the bulk send feature the signer email address bulk@recipient.com was used instead of actual signer email addresses.
- **WAPP-3746:** Corrected an issue in the Classic DocuSign Experience where envelope time information was not being shown when viewing envelopes in the Manage Tab when the Allow account members to set their own unique time zone setting was not enabled.
- **WAPP-3807:** Corrected an issue in the Classic DocuSign Experience where when all navigation tabs were removed from a user view when the User Permission - Send Envelopes setting was not enabled for the user.
- **WAPP-3988:** Corrected an issue in the Classic DocuSign Experience where when website language was set to Spanish or Portuguese, users could not access envelopes in the "Awaiting my Signature" folder.
- **WAPP-3993:** Corrected an issue in the Classic DocuSign Experience where the incorrect Home page was being shown to users between the DEMO and Production environments.
- **WAPP-4002:** Corrected an issue in the Classic DocuSign Experience where when sending an envelope with multiple signers that use SMS authentication, the telephone number was not being saved for the second and subsequent signers.
- WAPP-4003: Corrected an issue in the Classic DocuSign Experience where when sending with Bulk Sender file, the selected font type for signer tags was not being used.
- WAPP-4004: Corrected an issue in the Classic DocuSign Experience where Out for Signature information in the Home tab and Dashboards tab did not match the number of envelopes in the Out For Signature folder.
- WAPP-4006: Corrected an issue in the Classic DocuSign Experience where Signature tags shifted when replacing documents in a template.
- **WAPP-4044:** Corrected an issue in the Classic DocuSign Experience where the incorrect time zone was being shown for Stockholm.
- WAPP-4050: Added the ability to include Decline Reason in emails using the Branding Email Resource File.
- WAPP-4053: Corrected an issue in the Classic DocuSign Experience where the Authenticate on Each Access setting was not being honored for subsequent envelope access when Allow All to Edit was enabled for a tag.

- **WAPP-4054:** Corrected an issue in the Classic DocuSign Experience where templates were not being applied with template matching after adding multiple documents to an envelope.
- **WAPP-4068:** Corrected an issue in the Classic DocuSign Experience where Anchor Tags were not respecting case-sensitivity in the anchor tag text, causing some tags to not appear on a document.
- **WAPP-4124:** Updated the DocuSign Support email address in the Password Reset Request email.
- **WAPP-4161:** Fixed an issue where template Intelligent Document Recognition (IDR) zones were not being included in the template file when downloading the template in the DEMO environment.
- WAPP-4183: Corrected an issue in the Classic DocuSign Experience User - Sharing page where the user name was not being displayed in the heading.
- **SIGN-461:** Corrected a mobile signing issue where the "Are you Finished" text continued to be displayed after a signer removed a signature from a document.
- **DSP-1287:** Corrected an issue where some documents were missing in the zip file when trying to download the zip file using a Chrome browser. This is related to DSP-1288.
- **DSP-1288:** Corrected an issue where some documents were missing in the zip file when trying to download the zip file using an Internet Explorer 9 browser. This is related to DSP-1287.
- **PLAT-1073:** Corrected an API issue where a duplicate Document ID was created when another document is added to a draft envelope.
- PLAT-1385: Corrected a REST API issue where there were inconsistencies with listTab width in templates.
- PLAT-1685: Added accepted credit card types to the currencyPricePlan response when retrieving account billing information in the REST API.
- PLAT-1941: Added account user's password expiration date information to the response when retrieving user information in the REST API.
- **PLAT-2018:** Updated the REST API to check for clientUserId for checks that look at recipients to allow for changing signers from embedded (captive) to non-embedded. For REST PUTs the recipientId should be used as the key for changes.
- **PLAT-2020:** Corrected a REST API issue where when using a server template the recipient requireSignOnPaper setting was not being honored.
- **PLAT-2021:** Corrected a SOAP API issue where RequireSignerCertificate was being set to true for old templates when using the CreateEnvelopeFromTemplates method.
- PLAT-2099: Added account user's last login information to the response when retrieving user information in the REST API.
- **PLAT-2209:** Updated the SOAP API error message shown when a password protected PDF is uploaded to include filename for the PDF.
- PLAT-2225: Corrected a REST API issue where, for envelopes with multiple signers, if the sender tried to delete a recipient after the recipient had signed the envelope, the delete recipient event was still being added to envelope history even though deleting recipient failed.
- **PLAT-2277:** Corrected an OCR issue where a returned fax was being applied to two different envelopes.
- **PLAT-2289:** Corrected a platform issue where the signer had to adopt a new signature instead of using the existing signature when using the Sign a Document Now function.

- **PLAT-2301:** Corrected a PowerForms issue where an email PowerForm behaved like direct PowerForm when the recipient's email address matches the sender's email address.
- **PLAT-2304:** Corrected a platform issue for mobile and integration applications where signers were unable to open envelopes when the original sender's account was on a different server than the signer's account.
- PLAT-2314: Corrected an API issue where the sender's name was shown on the Phone Authentication screen instead of the recipient's name.
- **PLAT-2419:** Corrected an issue in the DEMO environment where the Branding Email Resource file was missing some email templates.
- **PLAT-2424:** Corrected a REST API issue in the DEMO environment where GET Connect Failure was not acting correctly.