Service Pack Notes for November 7, 2014

This document provides information about the updates deployed to the DocuSign Production environment as part of November 7, 2014 Service Pack. There are four sections in the Service Pack Notes:

- DocuSign Signed By Certificate Update
- Classic DocuSign Experience Updates
- API Changes for REST and SOAP
- Service Pack Bug Fixes

These notes have been updated since the Service Pack was deployed to the DEMO environment with the addition of Service Pack Bug Fixes WAPP-4642 and API-573. Changes are shown by change bars on the left side of the page.

DocuSign Signed By Certificate Update

DocuSign has made a required update to our *Signed By* certificate used with DocuSign Connect and the DocuSign APIs that might need your attention. DocuSign's current *Signed By* certificate expiries on November 12, 2014. If you uses the DocuSign x.509 certificate with DocuSign Connect or the DocuSign APIs, you might need to update information in your systems.

Schedule

The key dates for the DocuSign *Signed By* certificate update are given below:

October 8, 2014	The DocuSign Demo environment was updated with a switch to use either the current or new *Signed By* certificate. Your organization can update your web application and test the changes in the Demo environment.
October 13, 2014	The Production environment was updated with a switch to use either the current or new *Signed By* certificate. Your organization can promote your changes into Production and use the new *Signed By* certificate.
October 27, 2014	DocuSign automatically switched all accounts to use the new *Signed By* certificate in the DocuSign Demo environment.
November 3, 2014	DocuSign automatically switched all accounts to use the new *Signed By* certificate in the Production environment. **IMPORTANT:** If your organization has not updated your web application by this date, you will experience a service outage.

Action

The procedures for checking and updating your organization's settings are provided on the webpage:

https://www.docusign.com/support/classic/article/signed-by-replacement

If you have any questions, please email or call (866) 219-4318 to contact your DocuSign Account Manager.

Classic DocuSign Experience Updates

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

Report Updates

DocuSign is adding two new standard reports to the Reports Library: the Envelope Authentication Report and the Account Authentication Report. Both new reports are accessed through the Classic DocuSign Experience web application Reports tab.

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

- 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: • 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.

  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: • 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.

API Changes

The following API changes were deployed to the DocuSign Production environment as part of November 7, 2014 Service Pack.

REST API Changes

Important Date-Time Correction Note:

With this service pack DocuSign is correcting 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:

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
rsaVeridAccountName	String	Admin	The RSA account name.
rsaVeridPassword	String	Admin	The password used with the RSA account.
rsaVeridRuleset	String	Admin	The RSA rule set used with the account.
rsaVeridUserId	String	Admin	The user ID for the RSA account.

Envelope eventNotification Updates:

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:

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.

SOAP API Changes

Envelope EventNotifcation Updates:

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:

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

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.

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 DocYouSign" 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.