Release Notes

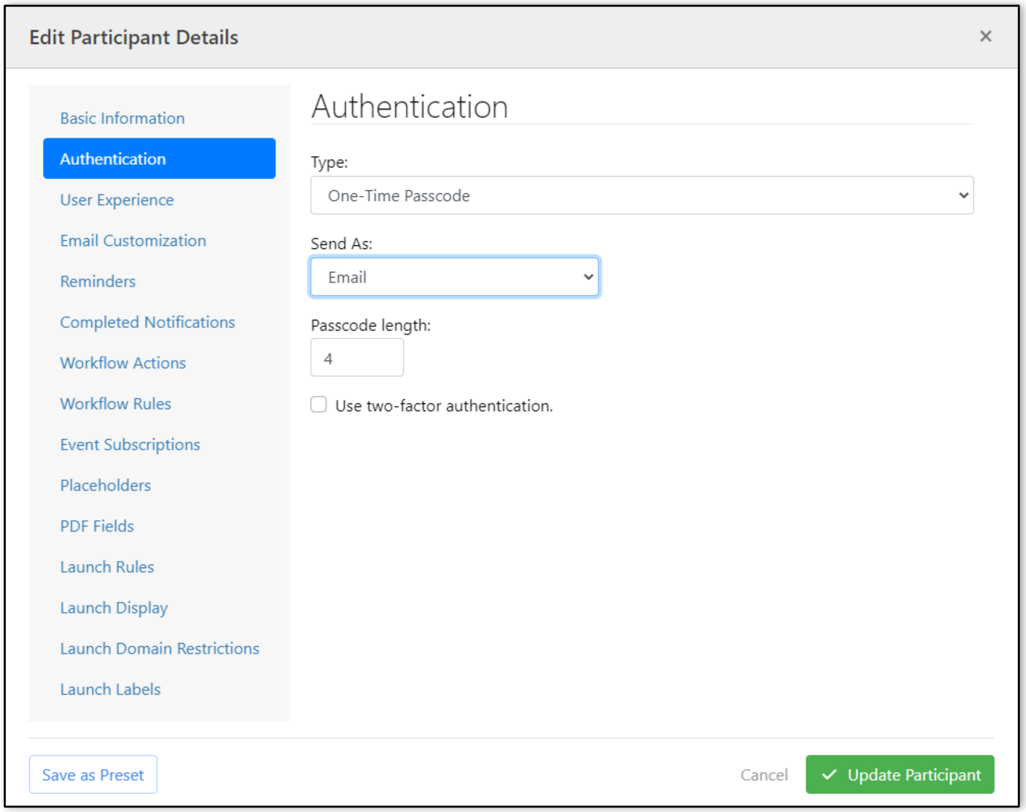
v5.17.0 Release *Production Release Date: 7/13/2023*

New Features

[PEP-6538] - Added the ability to allow listing and updating participant and task workflow actions via new Rest and Soap API endpoints. Please see the new API calls below and additional information in the developers guide.
https://developers.alphatrust.com/documentation/code-samples/workflow-actions.html

- GetTaskWorkflowActionsUpdateable()
- UpdateTaskWorkflowAction()
- GetParticipantWorkflowActionsUpdateable()
- UpdateParticipantWorkflowActions()

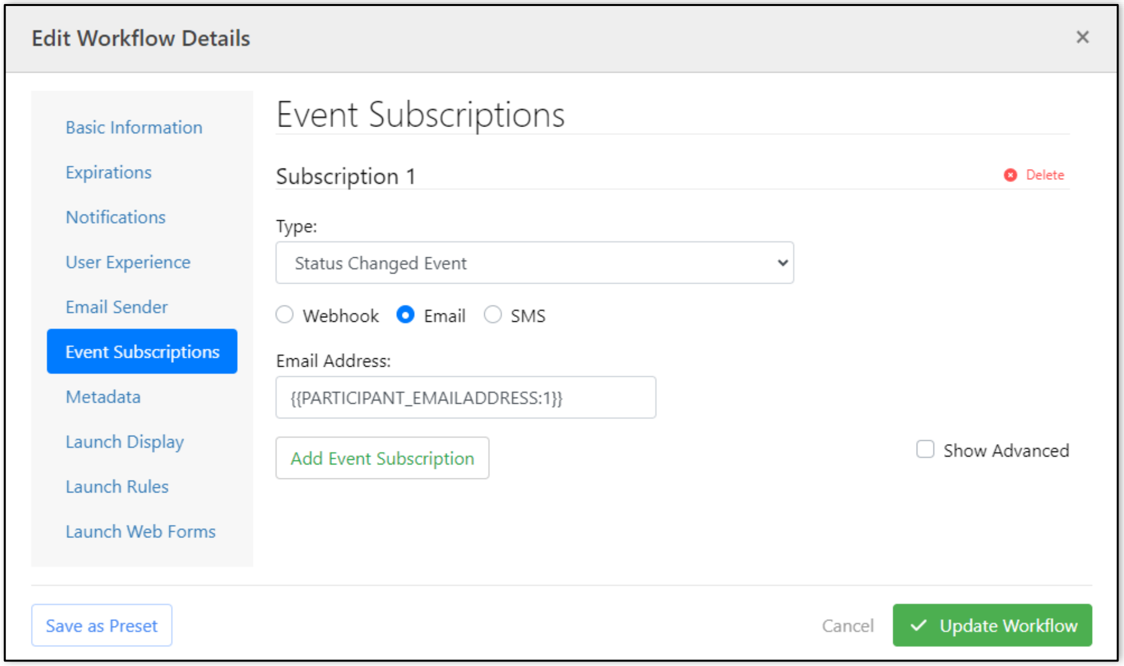
[PEP-5550] - Added the ability to send a One-Time Passcode to signing Participants in an email. *Mobile* Authentication has been renamed to *One-Time Passcode*. Please see the image below for more details.



[PEP-5424] - Added the ability to use placeholders for emails within Event Subscriptions. The new placeholders and Event Subscription settings referenced can be seen below. Also, please see the example image below using the Participant emails address index placeholder.

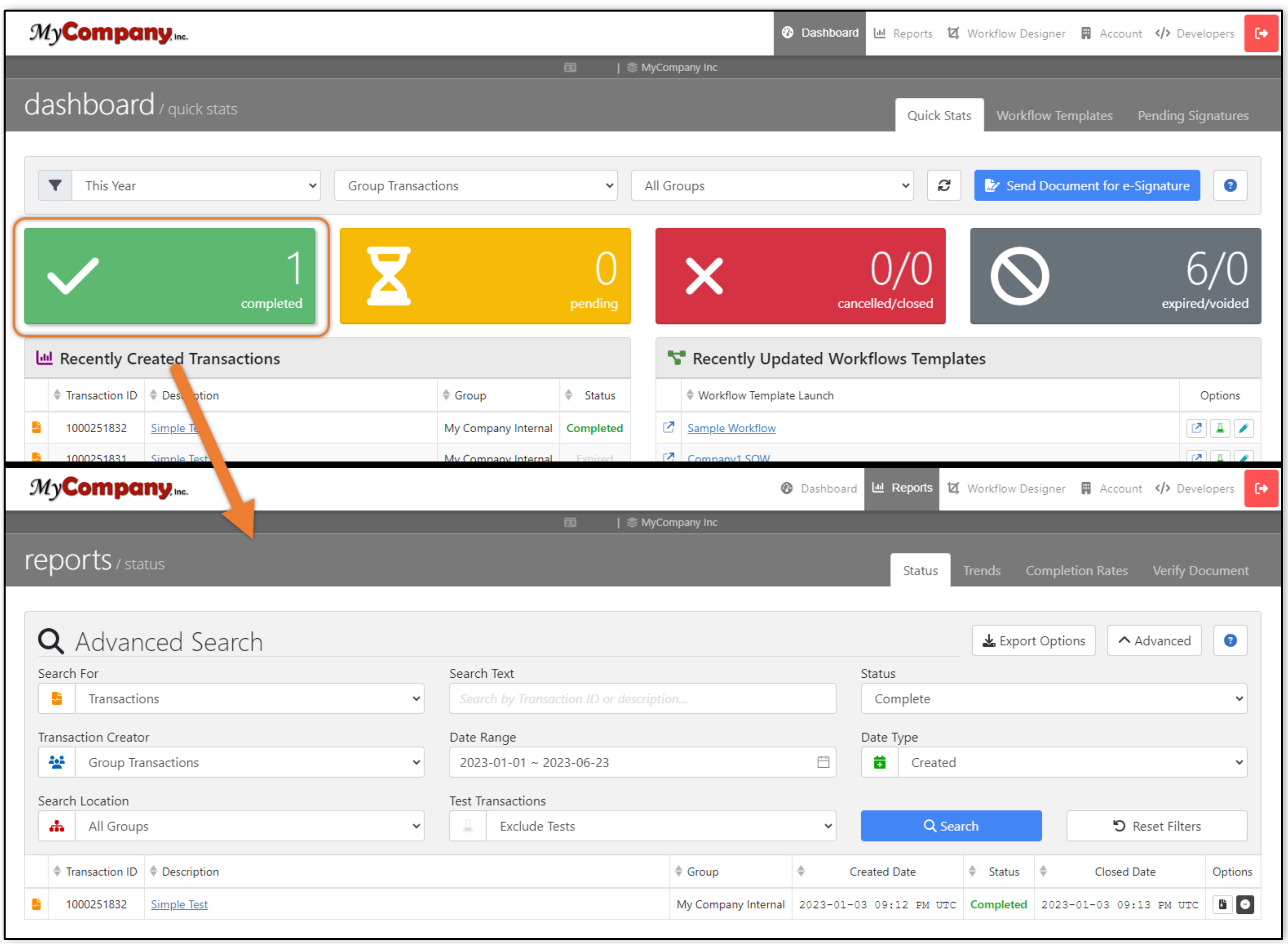
- {{LAUNCHER_EMAILADDRESS}} - The email of the user who made the transaction
- {{PARTICIPANT_EMAILADDRESS:[Index]}} - The email of the participant at [Index], this index starts at 1
- {{PARTICIPANT_EMAILADDRESS:[Role]}} - The email of the participant who has the [Role] as their role, this index starts at 1

Release Notes



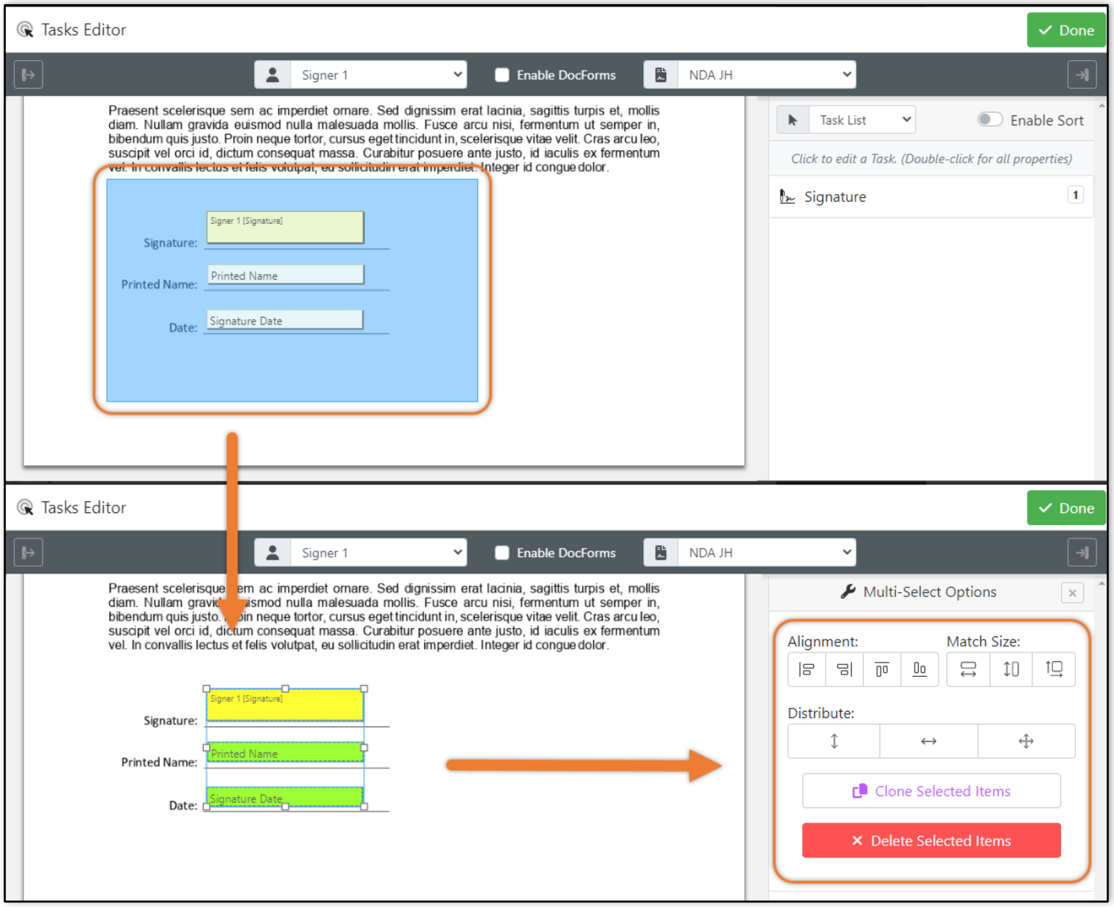
Improvements

[PEP-6901] - Improved the Quick Stats page by adding links to the Color Status blocks. The links will navigate the user to the Status page with the filter of the Color Status block selected. Please see the example image below for more details.

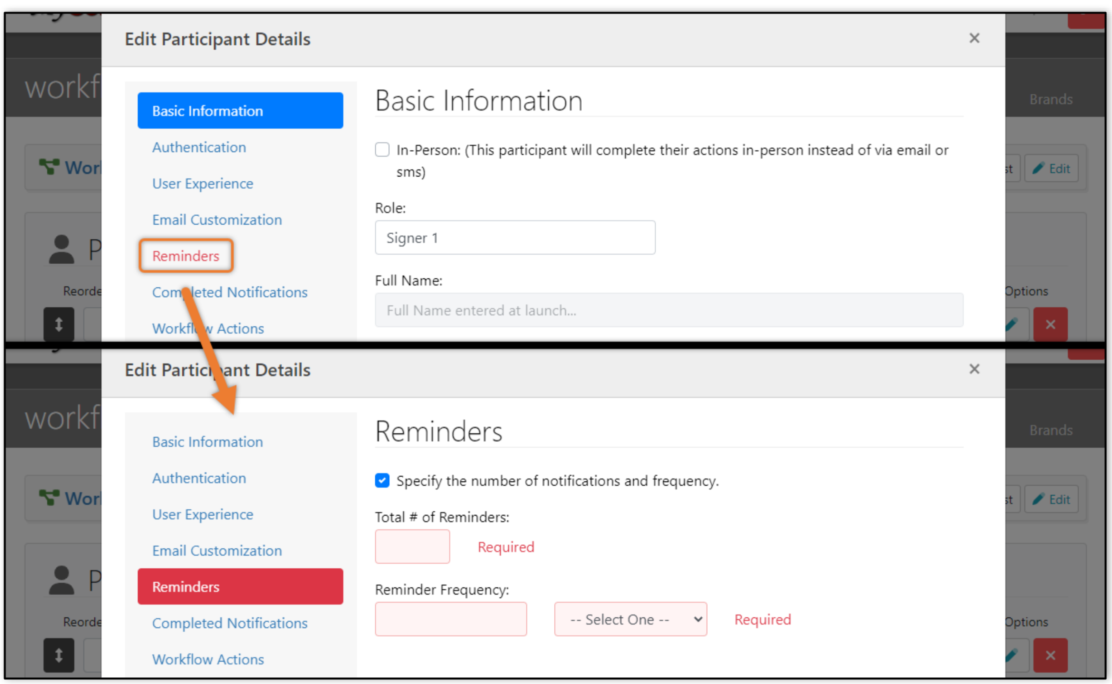


Release Notes

[PEP-6643] - Improved and added new functionality to the Tasks Editor. Users can select multiple fields by dragging the mouse and adjust alignment and sizing when you have multiple fields selected. Please see an example of the new functionality in the image below.

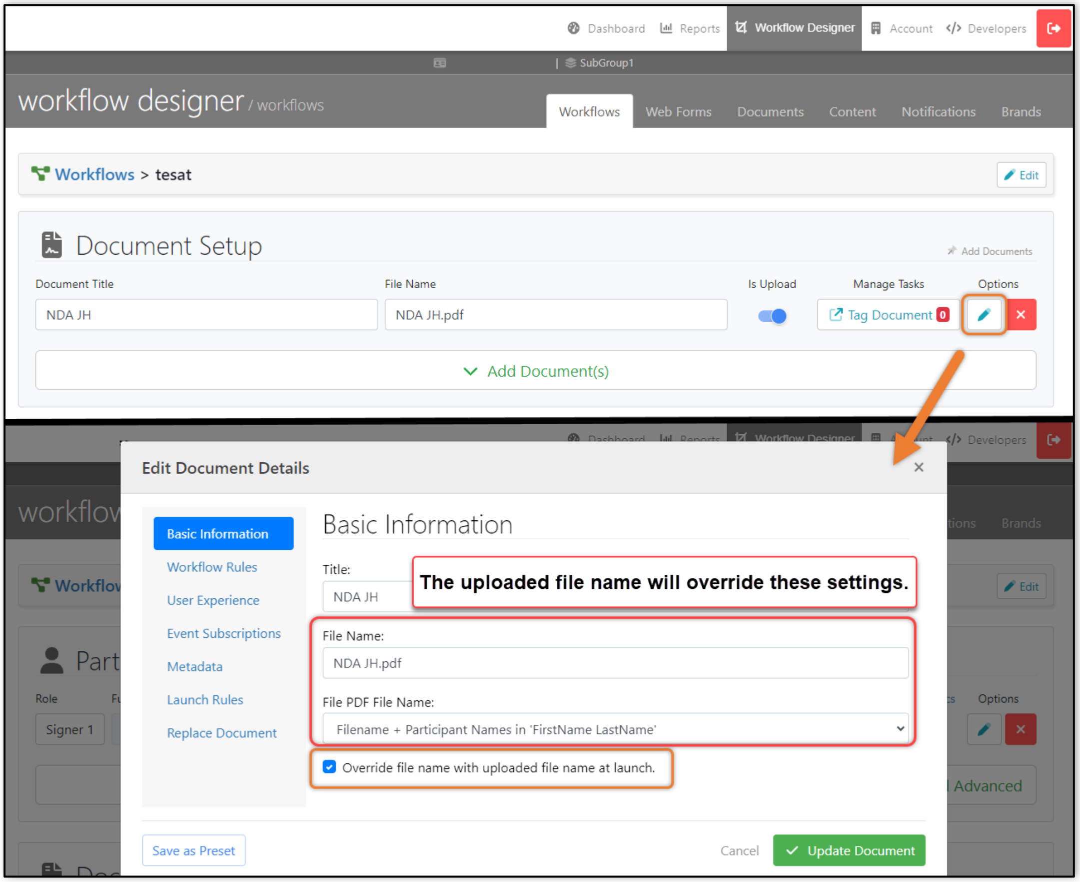


[PEP-6554] - Added Error indications in all editor modal tabs to notify the user when there's an error on active and inactive tabs. This allows the user to see there's an issue and where to go to resolve it when attempting to save any updates. Please see the example image below for additional details.

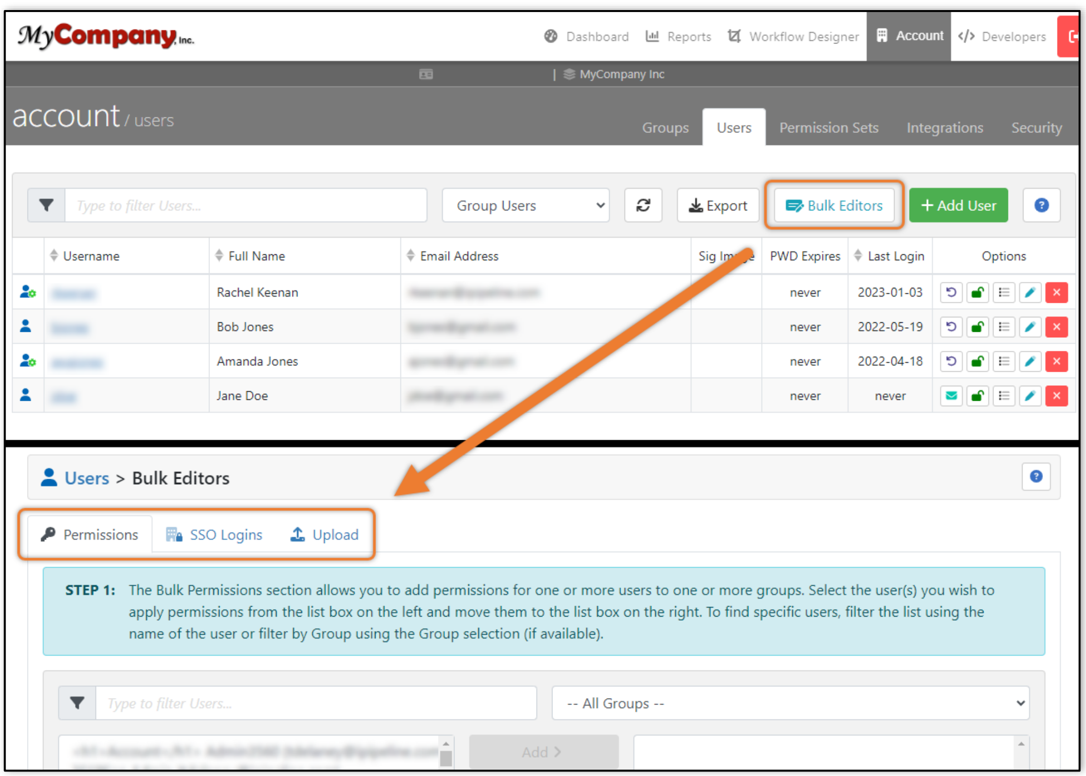


Release Notes

[PEP-6473] - Added the ability for the uploaded document file name to override the Document File Name set in the Workflow Document Details. Please see the image below for additional information.

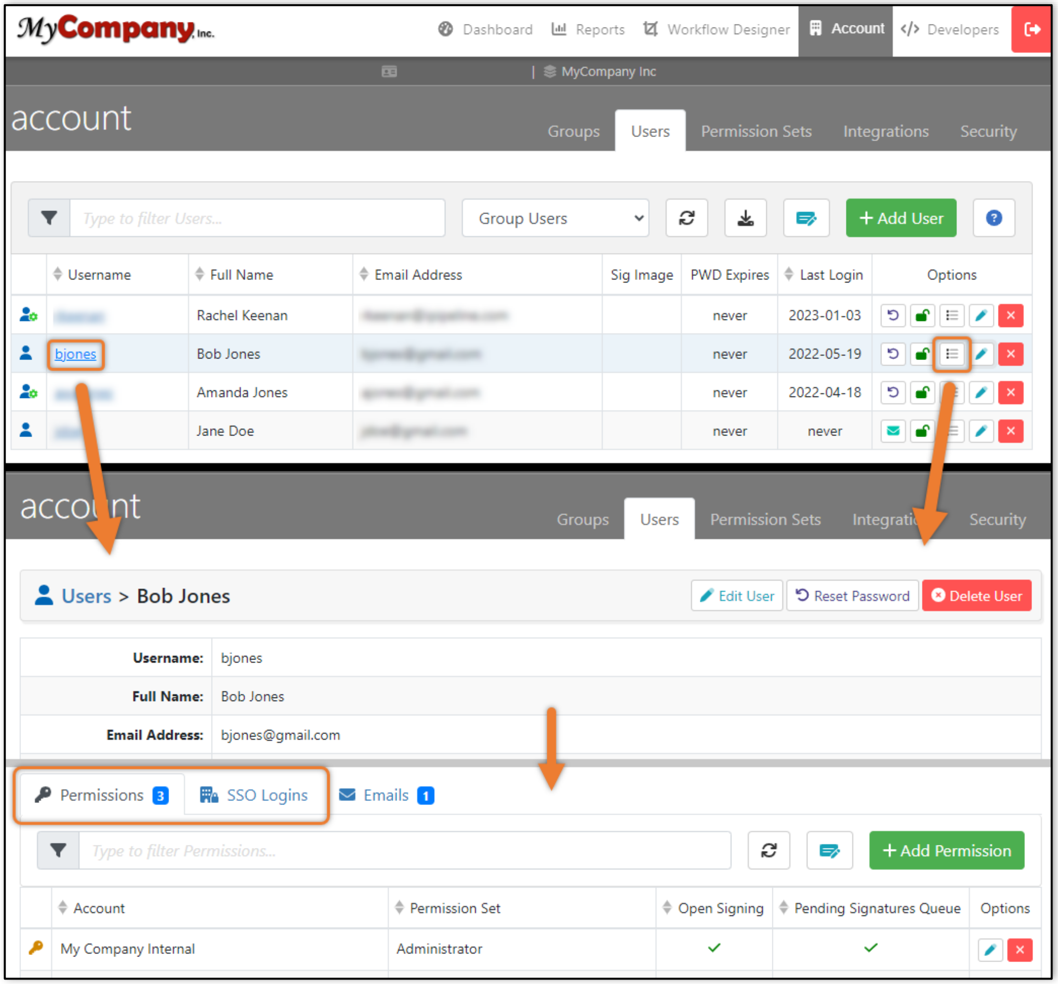


[PEP-6245] - Centralized bulk user editors into one location and added a Bulk SSO Logins option. Bulk Permissions, Bulk User Upload, and Bulk SSO Logins are now located in the Bulk Editors section. Please see the image below for more details.

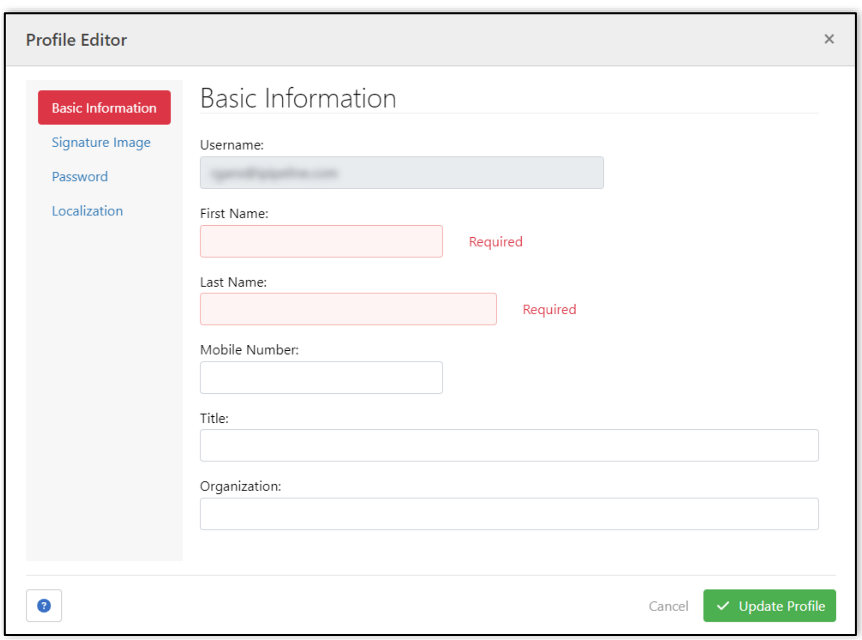


Release Notes

[PEP-6194] - Moved Permissions and SSO Logins for Users from the User Edit modal to the User details page. The Users details page can be accessed by clicking on the Username or the View Details button for the user. Please see the image below for additional details.



[PEP-6153] - Added support for displaying errors on unselected tabs in the Profile Editor. Please see the image below for an example.



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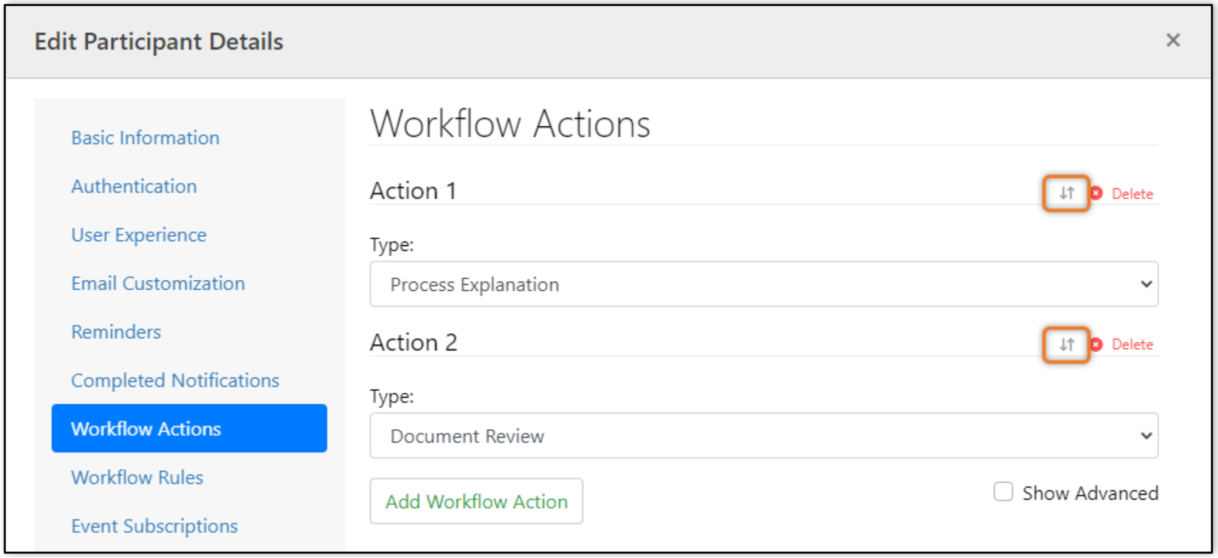
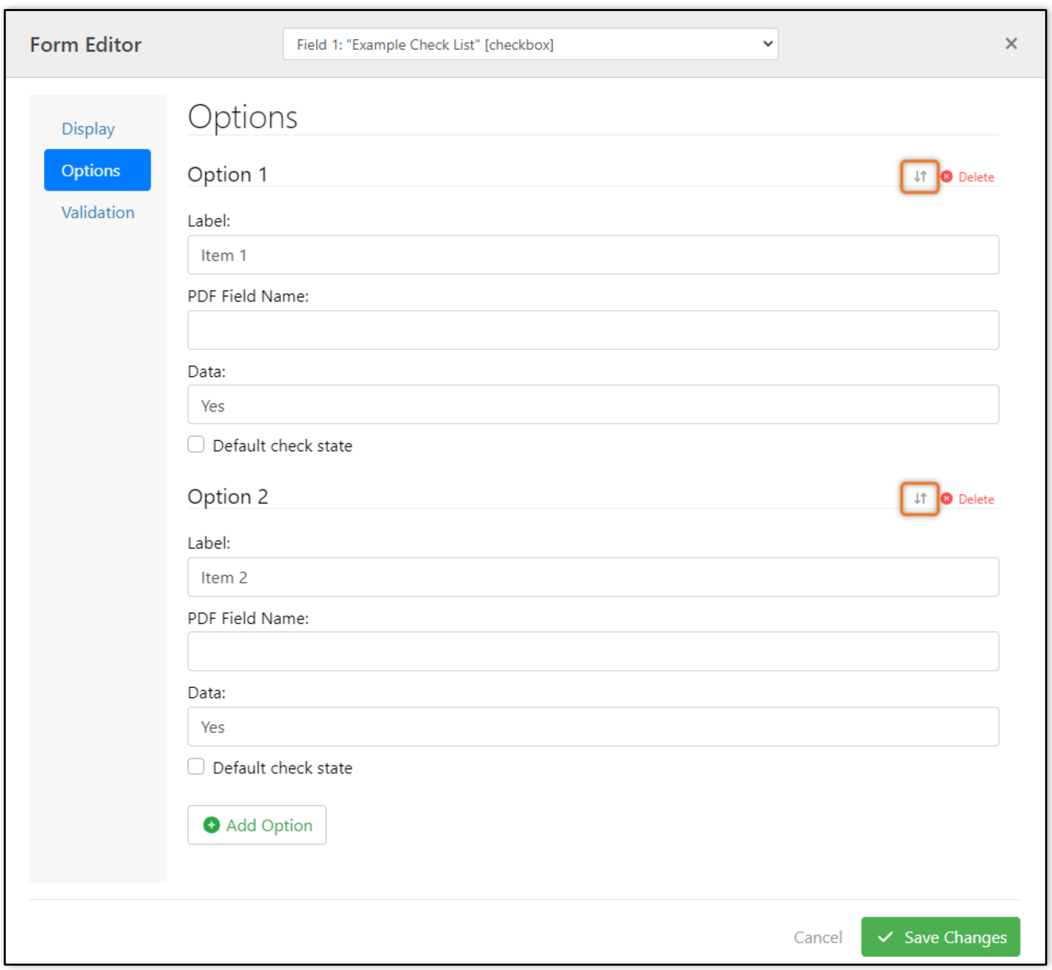
[PEP-6151] - Added additional placeholders for notifications. More information can be found in the developers guide. https://developers.alphatrust.com/documentation/participants/notification-placeholders.html.

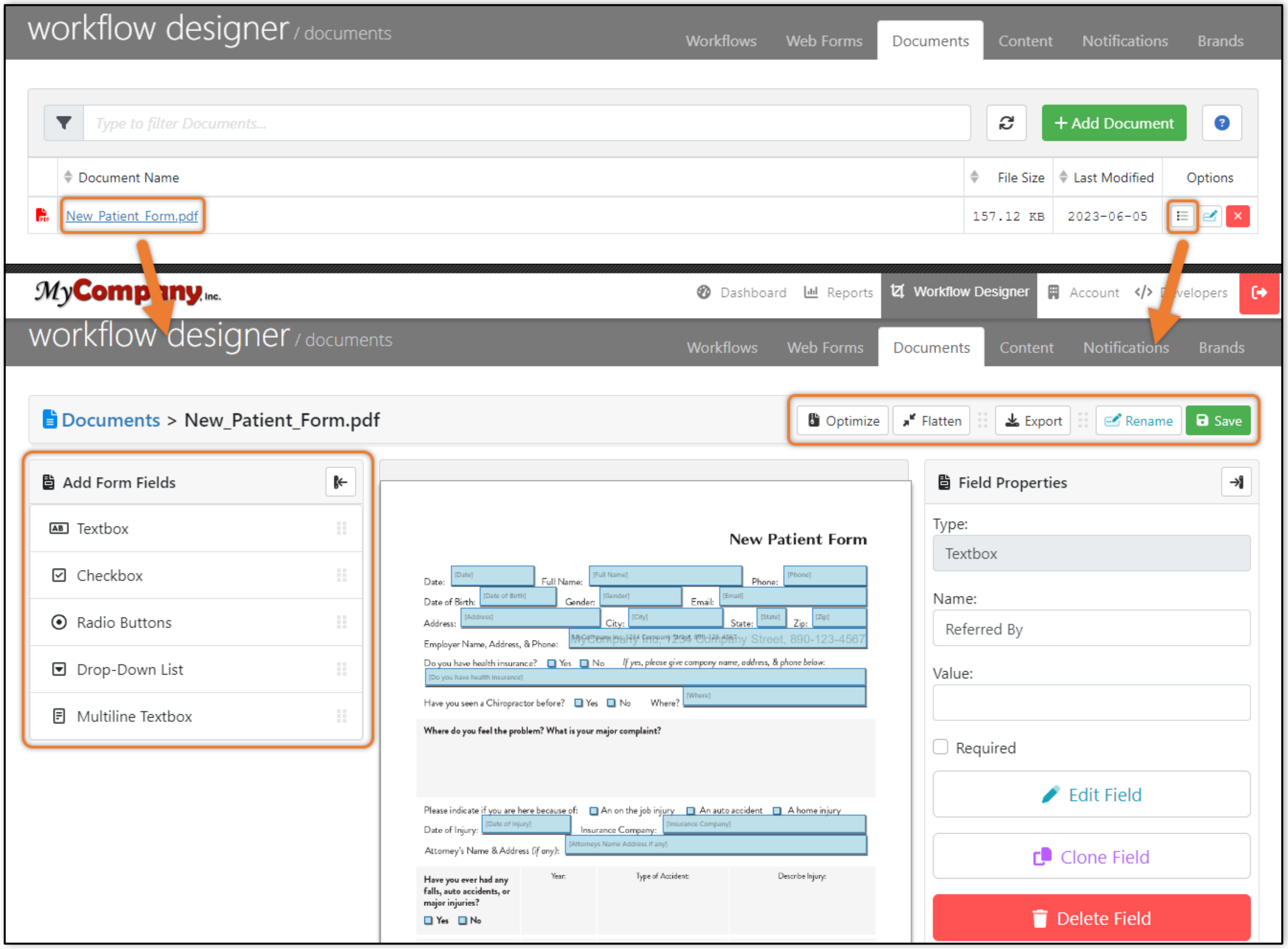
[PEP-6149] - Added the ability to reorder Workflow Actions for Participants and Document Tasks. This ability was also added to Web Form options for Radio Buttons, Checkboxes, and Dropdown Lists. Please see the examples for Workflow Actions and Web Form options in the images below.





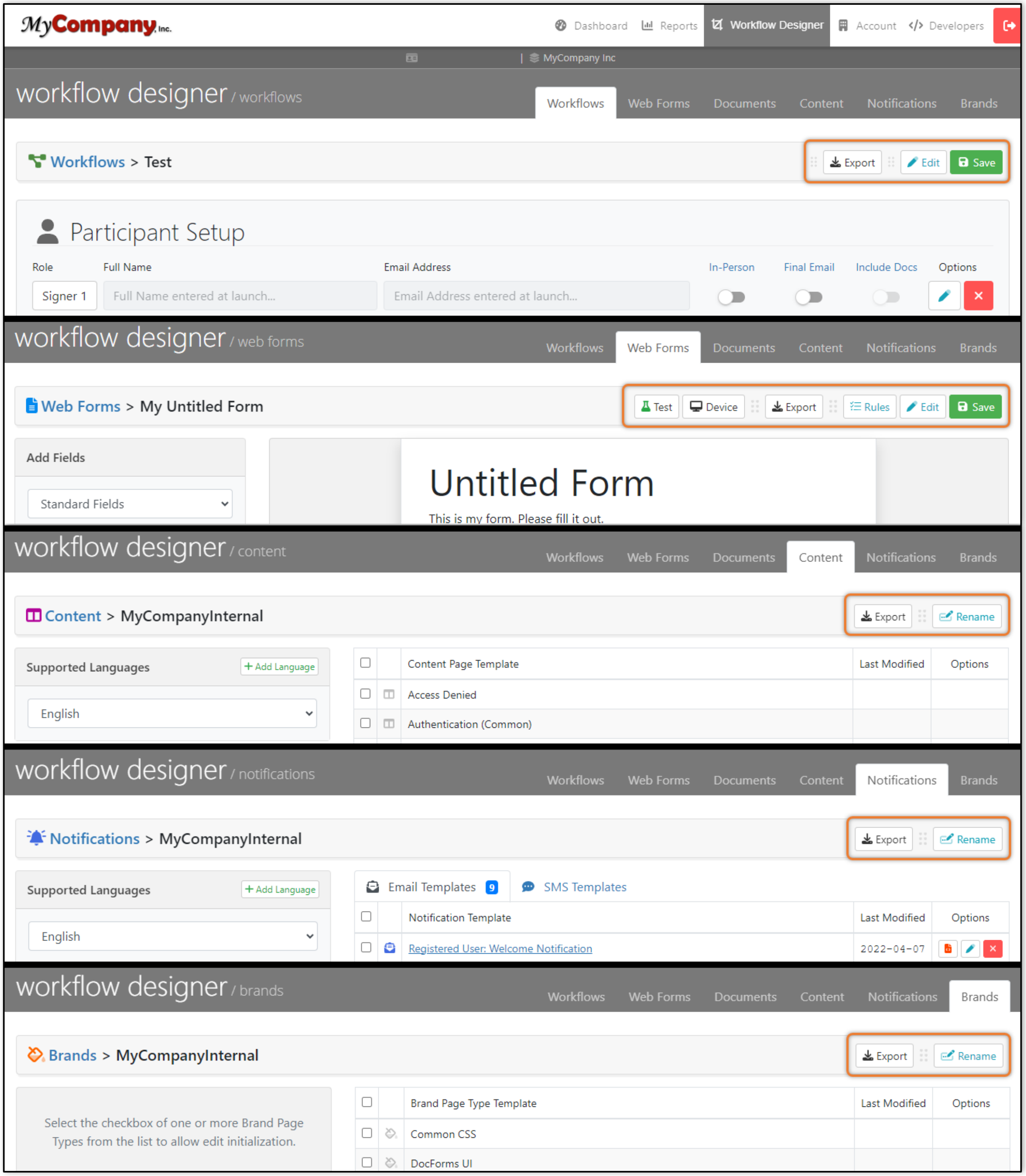
Release Notes

[PEP-6026] - Enabled editing of PDF Documents in the Workflow Designer > Documents tab. This includes options to add/edit fields within the PDF, save changes directly to the PDF file, and the ability to optimize and flatten PDFs. Please see the image below for the settings and options referenced.



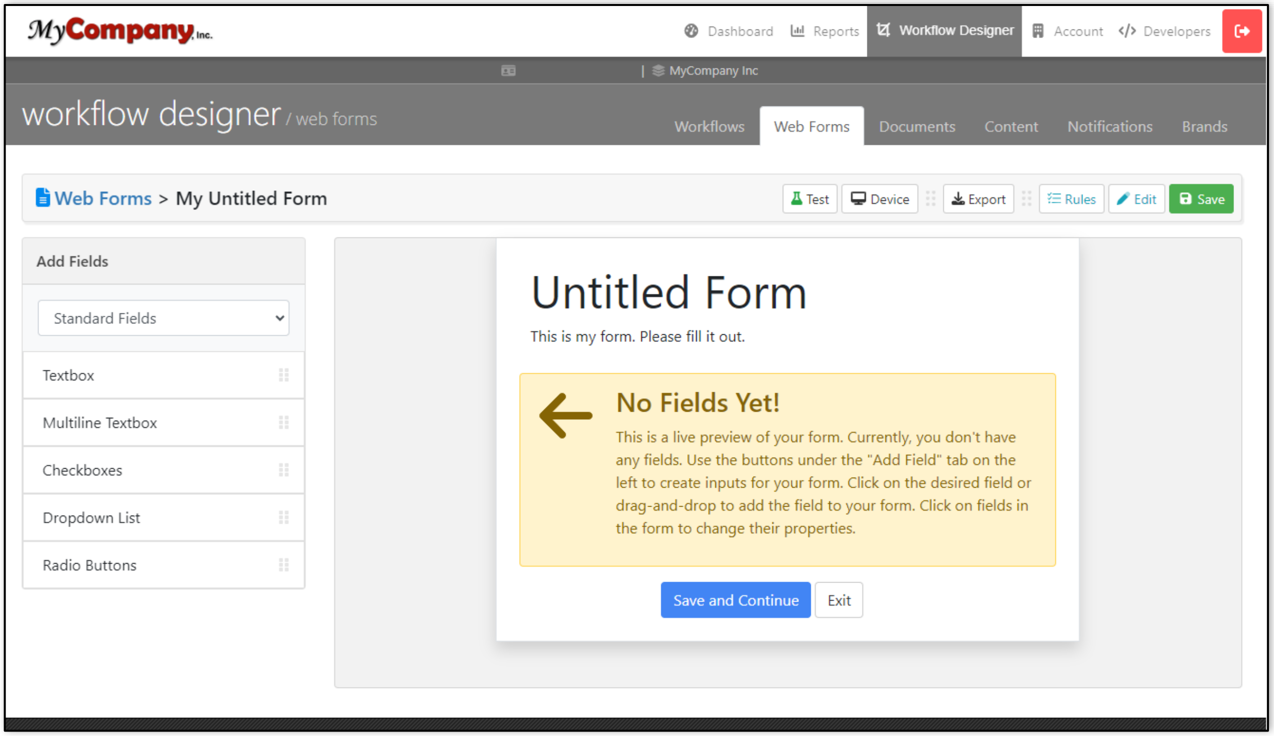
[PEP-6025] - Updated the UI for Workflow Setup, Content, Notifications, Web Forms, and Brand pages to be more consistent with other new UI updates. Please see the image below for more details.

Release Notes



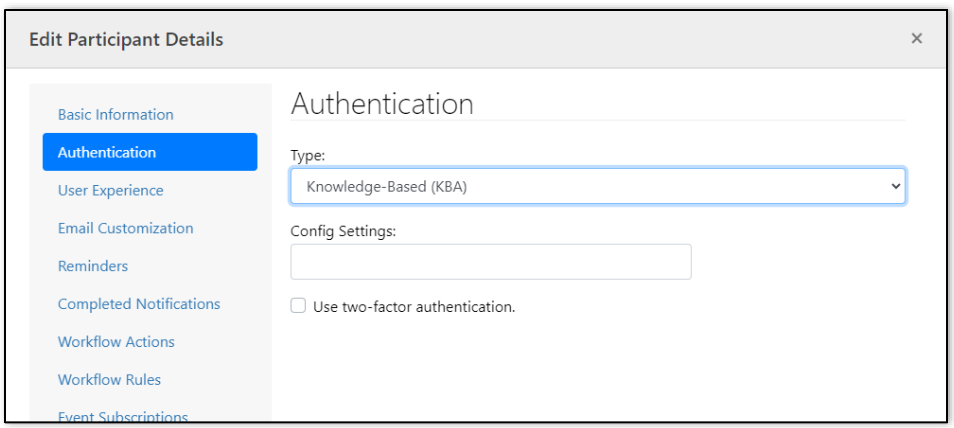
[PEP-5974] - Redesigned the Web Forms page for more consistent UI across the platform. Please see the image below for more details.

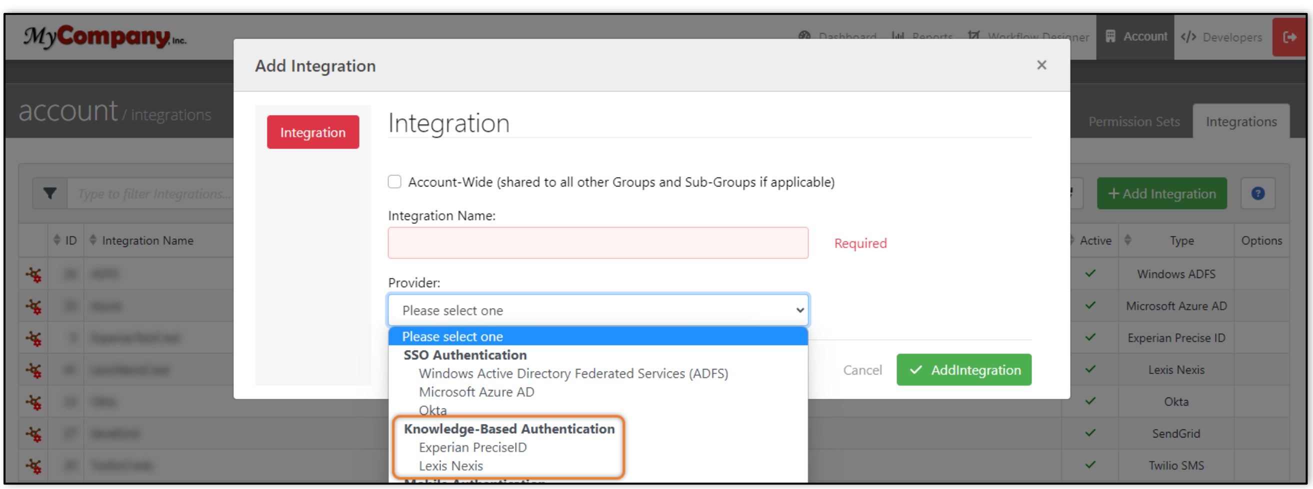
Release Notes



Bug Fixes

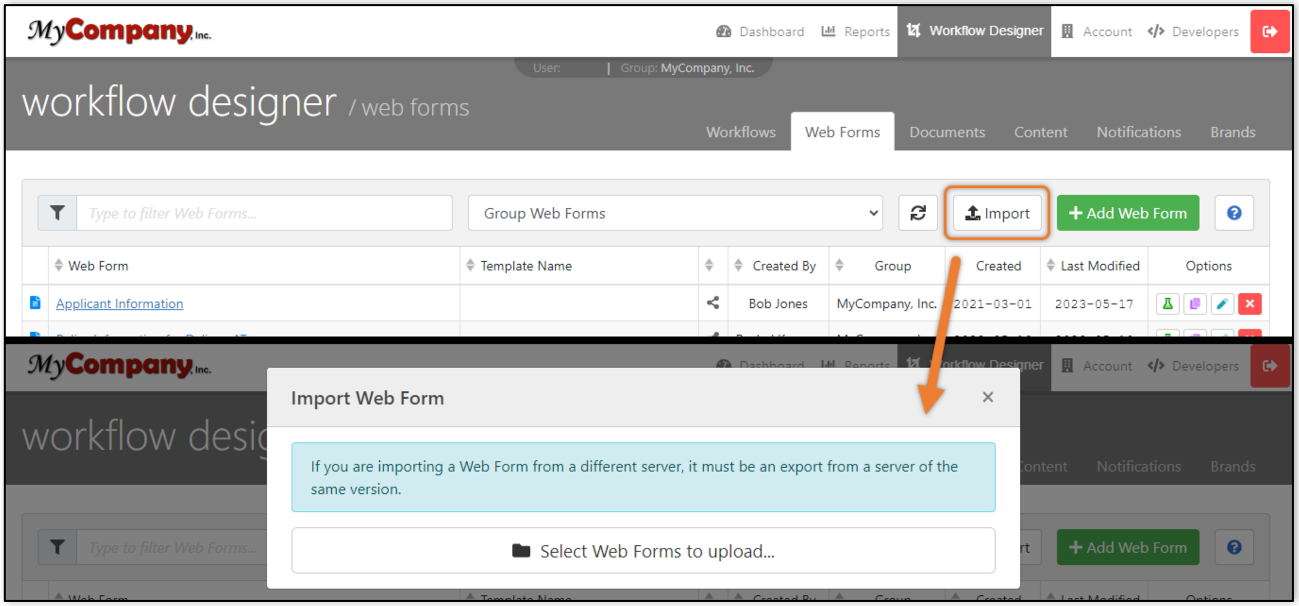
[PEP-6906] - Fixed issue where Participant metadata used to authentication via KBA wasn't properly overwriting the initial Participant metadata. Please see the images below for the settings referenced.



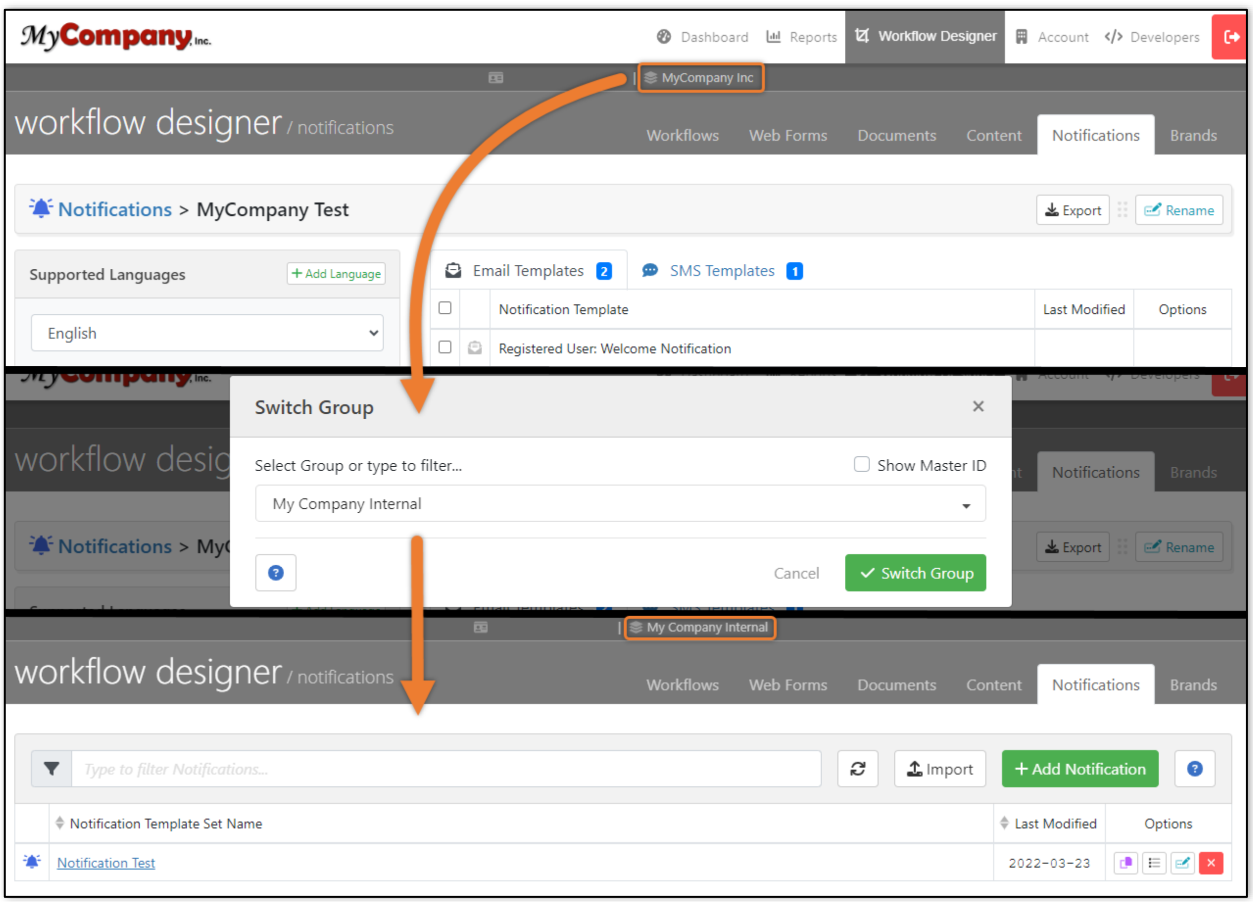


Release Notes

[PEP-6759] - Fixed issue where if a user closed an upload modal without completing an upload, the previously selected file list would remain instead of being cleared once the modal was closed. This issue was seen when importing Web Forms, Documents, Content, Notifications, and Brands. Please see the image below for more information.



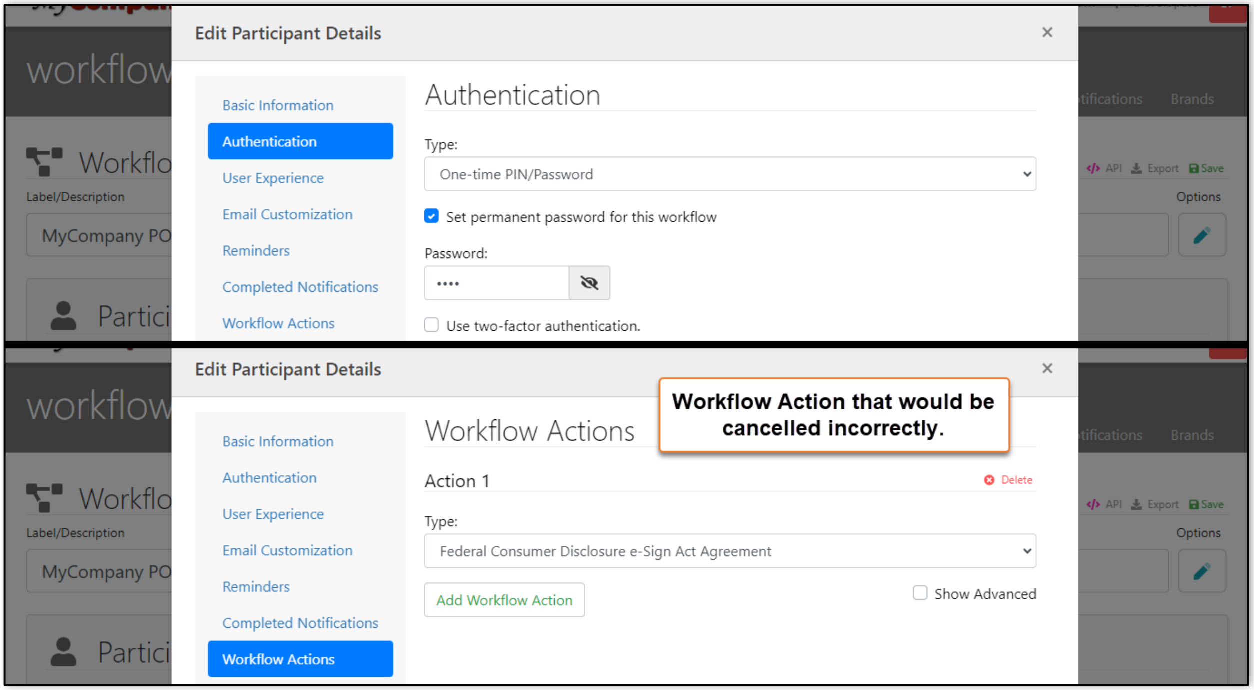
[PEP-6752] - Fixed issue where a user would not be returned to the Notifications, Documents, or Brands main screen after changing Groups. The user will now be redirected to the main list tab if the item doesn't exist in the content, notifications, brands, or documents tabs after switching Groups.

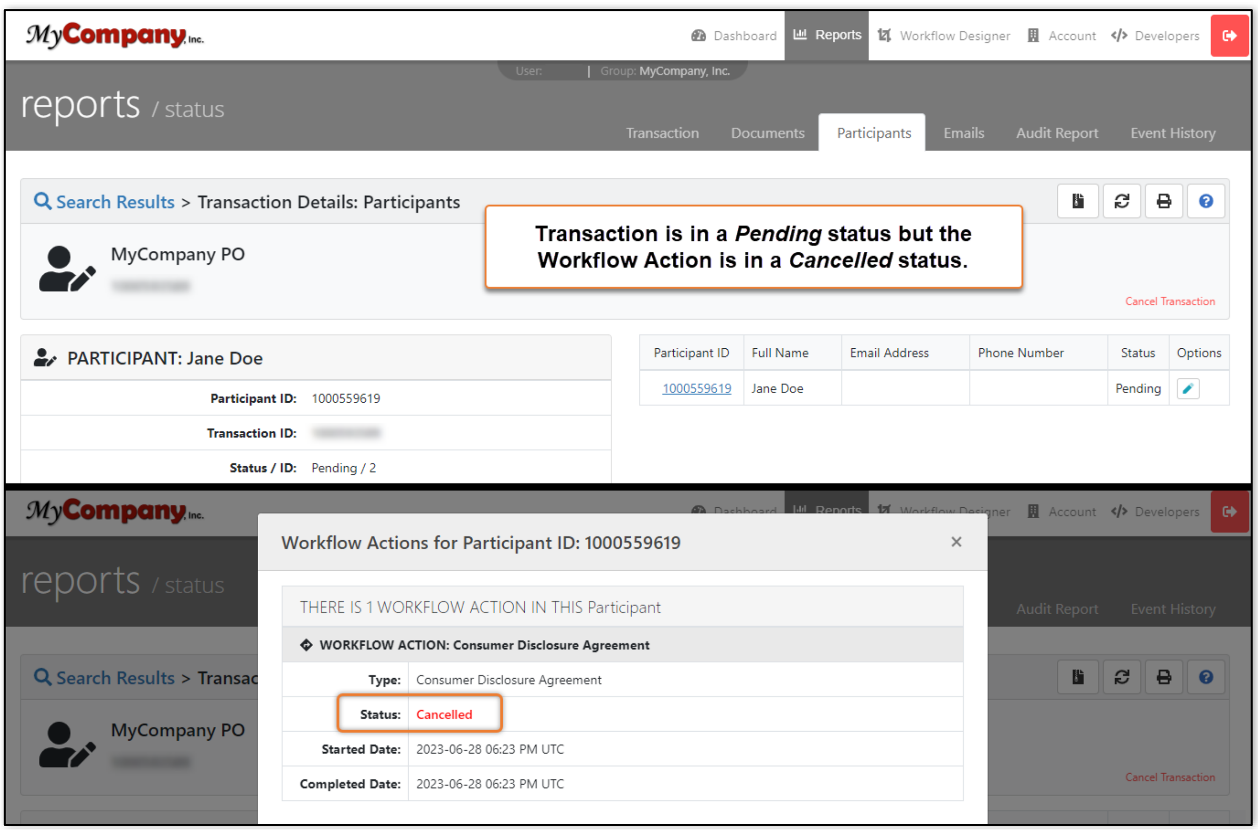


[PEP-6751] - Fixed issue where the content security policy would block log rocket from consistently recording.

Release Notes

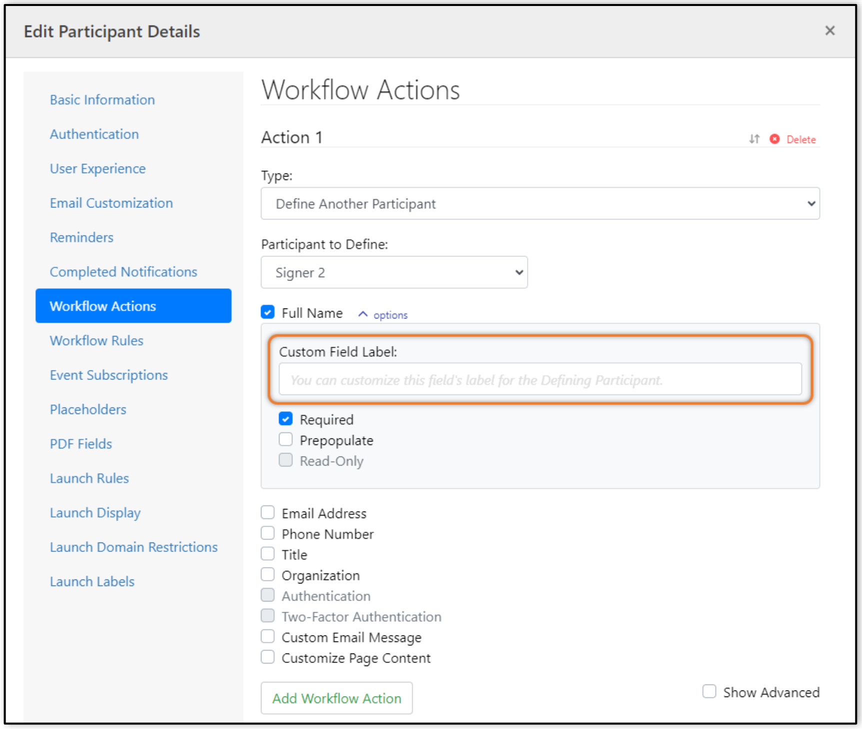
[PEP-6703] - Fixed issue where when exiting from an authentication screen, the next workflow action would be incorrectly cancelled. Please see the images below of the referenced settings and additional details.





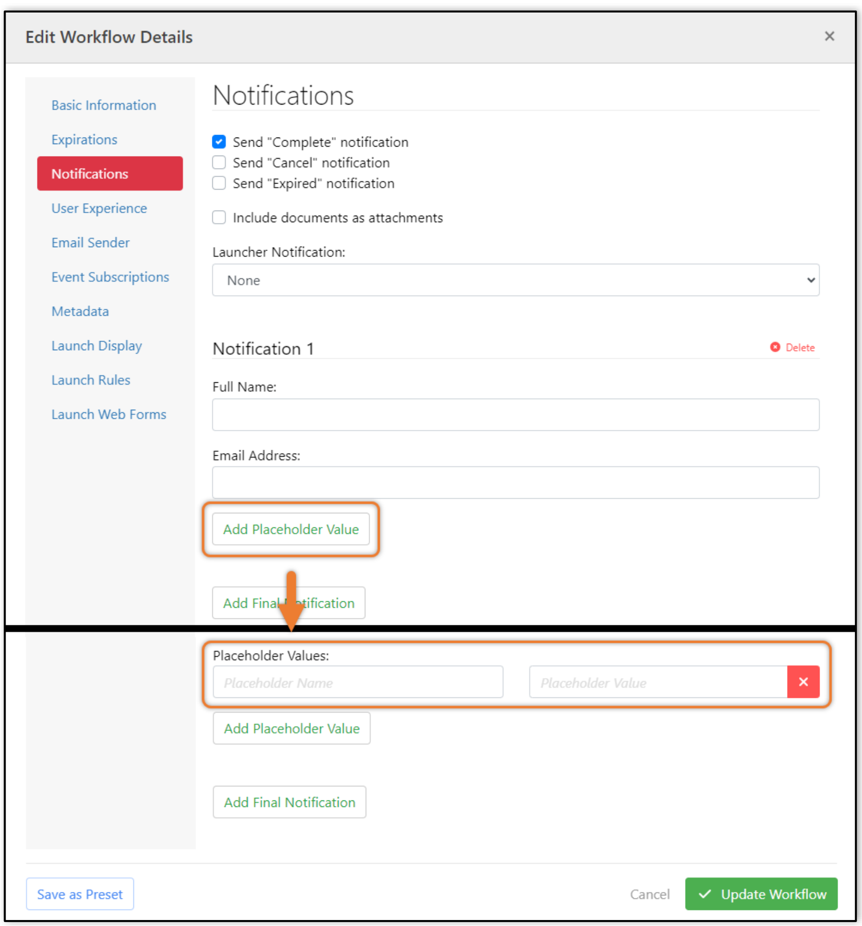
[PEP-6669] - Fixed issue where Custom Field Labels were not being shown when defining another participant in a transaction. This affected all information that could be requested for another participant. Please see the image below for the settings referenced.

Release Notes



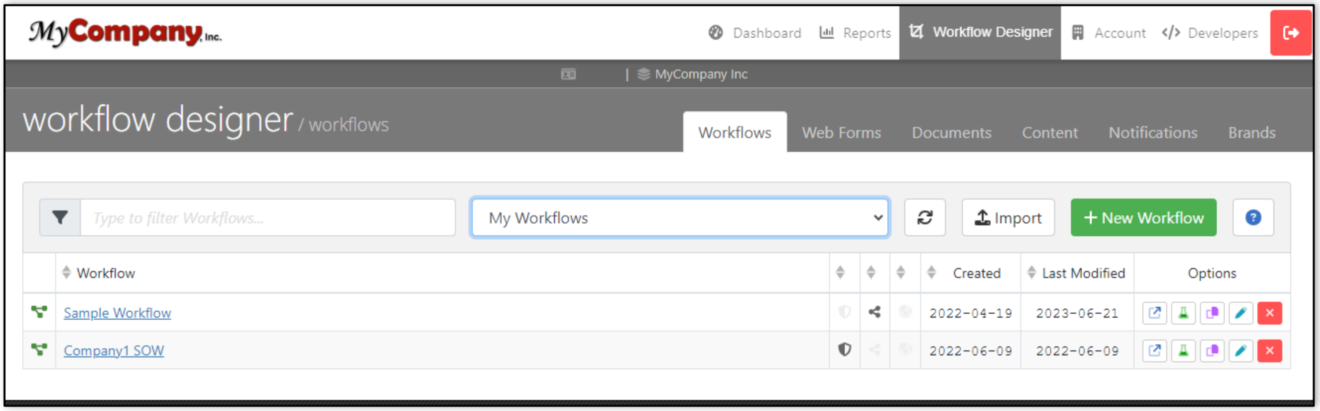
[PEP-6667] - Fixed issue where a user could enter an organization name longer than 64 characters. Added max character length check for the participant organization property.

[PEP-6608] - Fixed issue where the "Add Placeholder Value" button would not appear at the bottom of the Notifications section in the Edit Workflow Details pop-up. Please see the image below for more information.

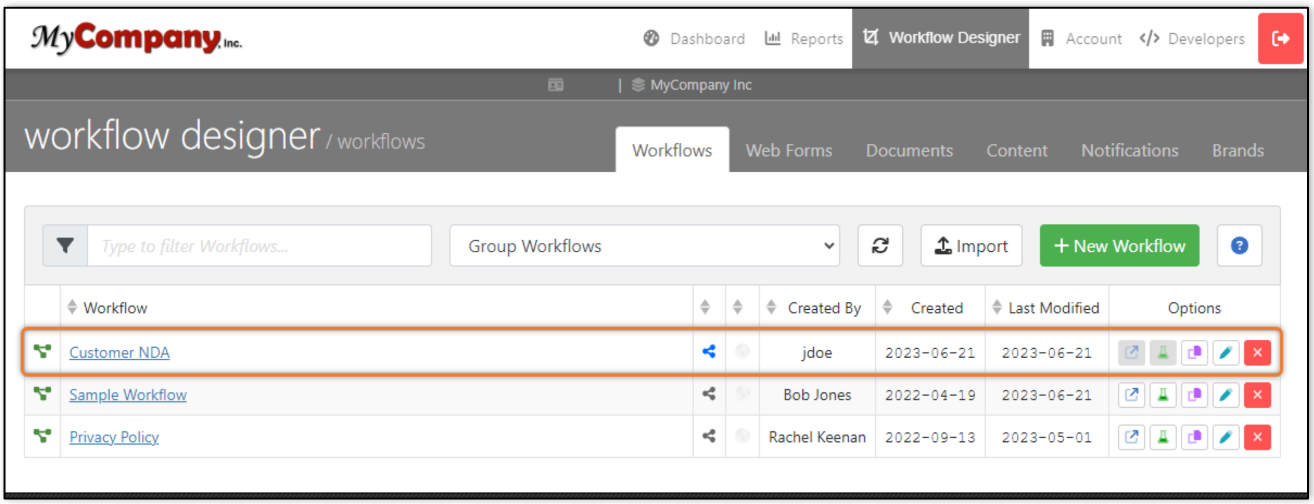


Release Notes

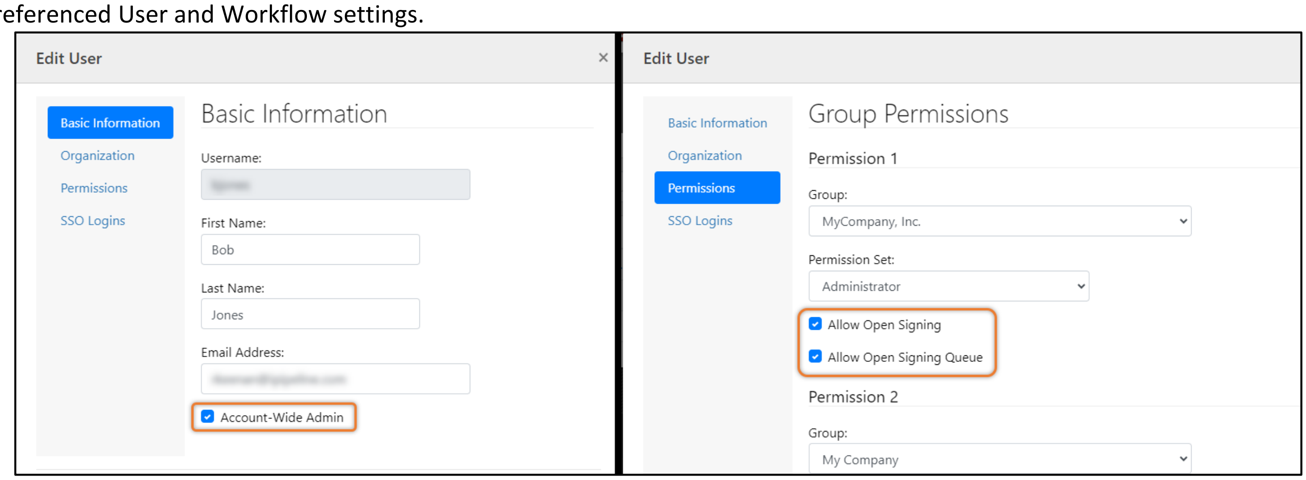
[PEP-6564] - Fixed issue where Workflows may not appear when switching from the Group Workflows filter to My Workflows filter. Workflows would appear after navigating away and returning to the My Workflows filter. Please see the image below for more information.



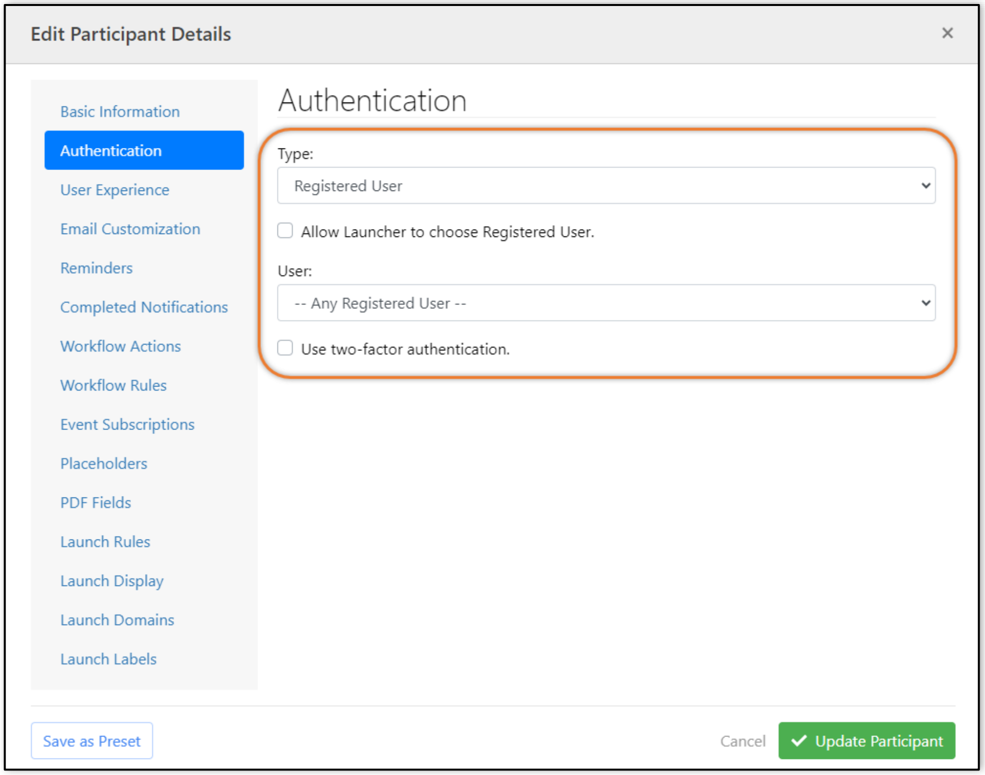
[PEP-6561] - Fixed issue where the copy button would be disabled if the user who created the Workflow was deleted. Please see the example Workflow, which was created by a deleted user, in the image below.

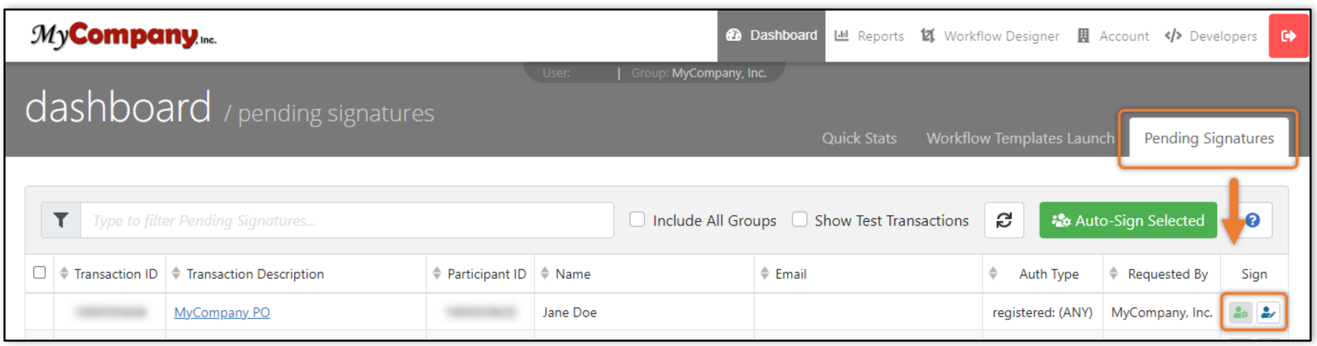


[PEP-6559] - Fixed issue where Account-wide admins that do not have explicit open-signing permissions would be able to see and sign open-signing transactions. Please see the images below for an example transaction with open-signing and the referenced User and Workflow settings.

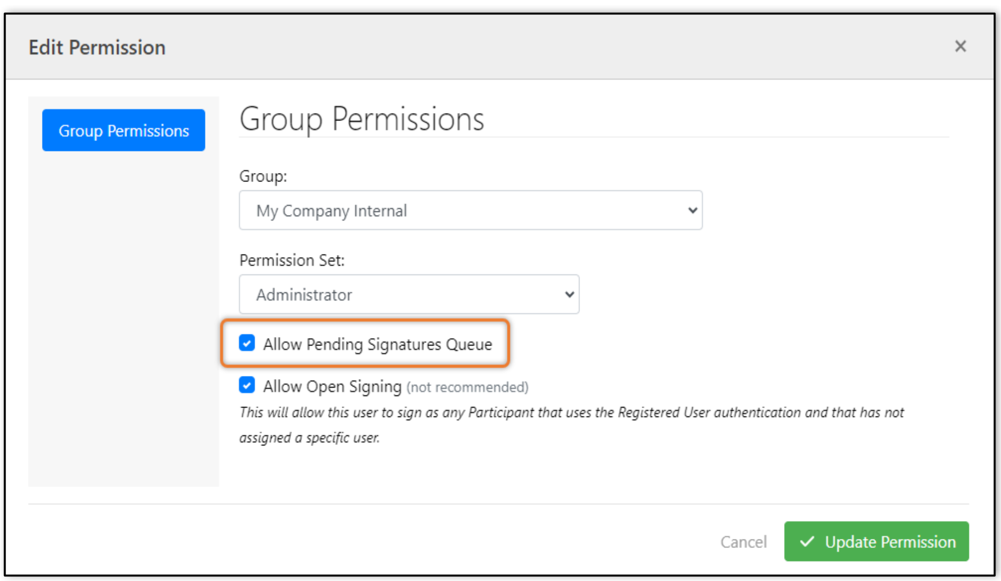


Release Notes



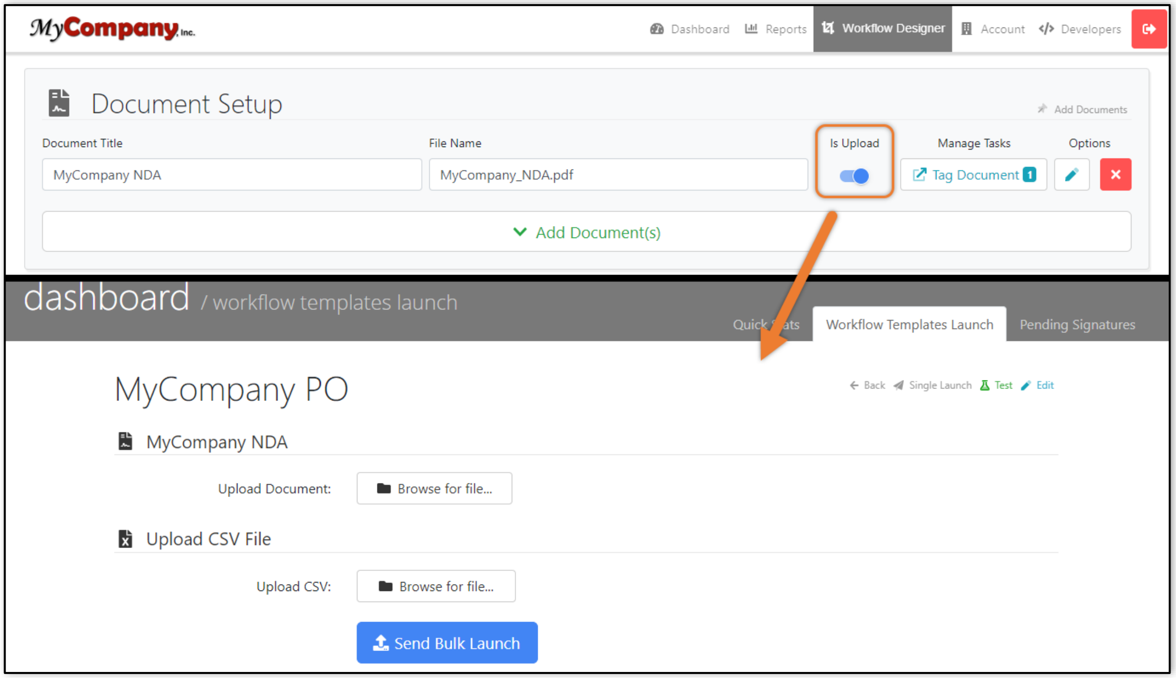


[PEP-6558] - Fixed issue where the Allow Pending Signatures Queue setting was mislabeled and would only appear after selecting the Allow Open Signing setting. Please see the image below for more information.



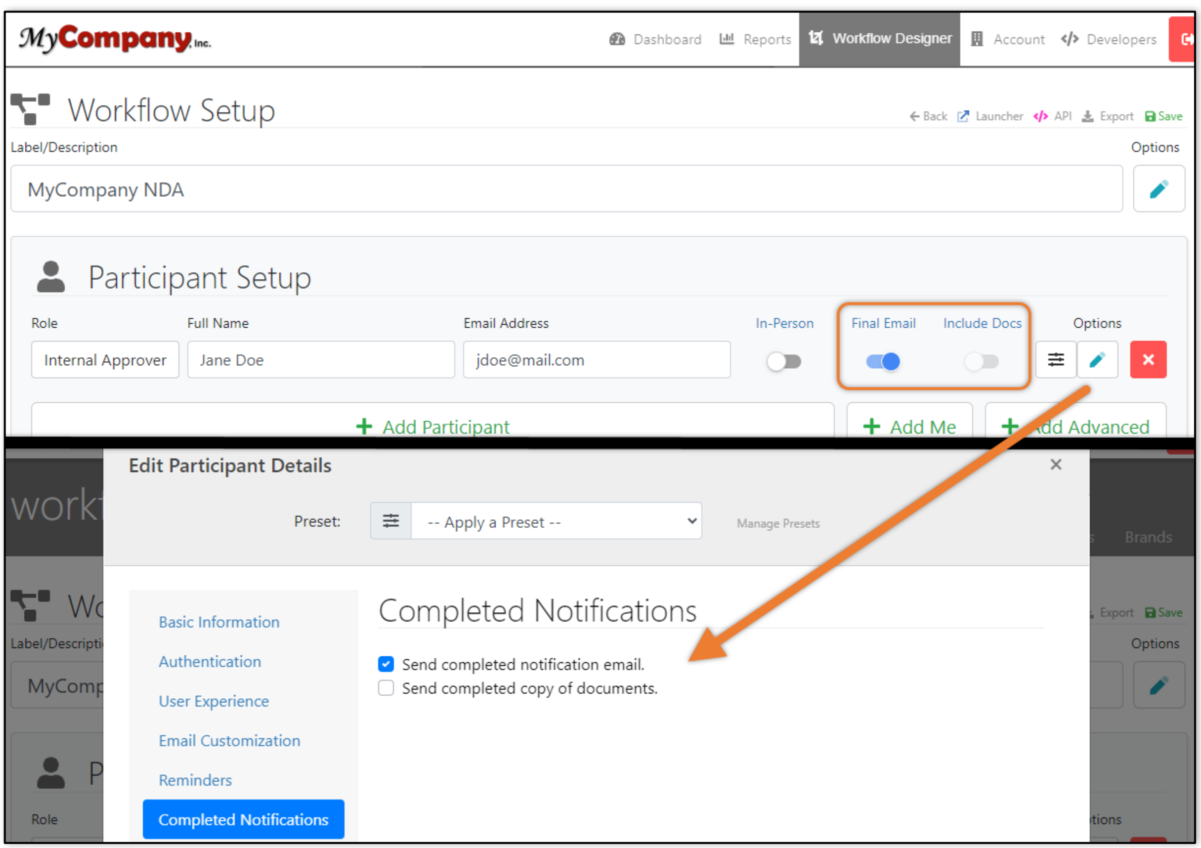
Release Notes

[PEP-6371] - Fixed issue where fields would not properly populate for an uploaded document when bulk launching. Please see the referenced settings in the image below.



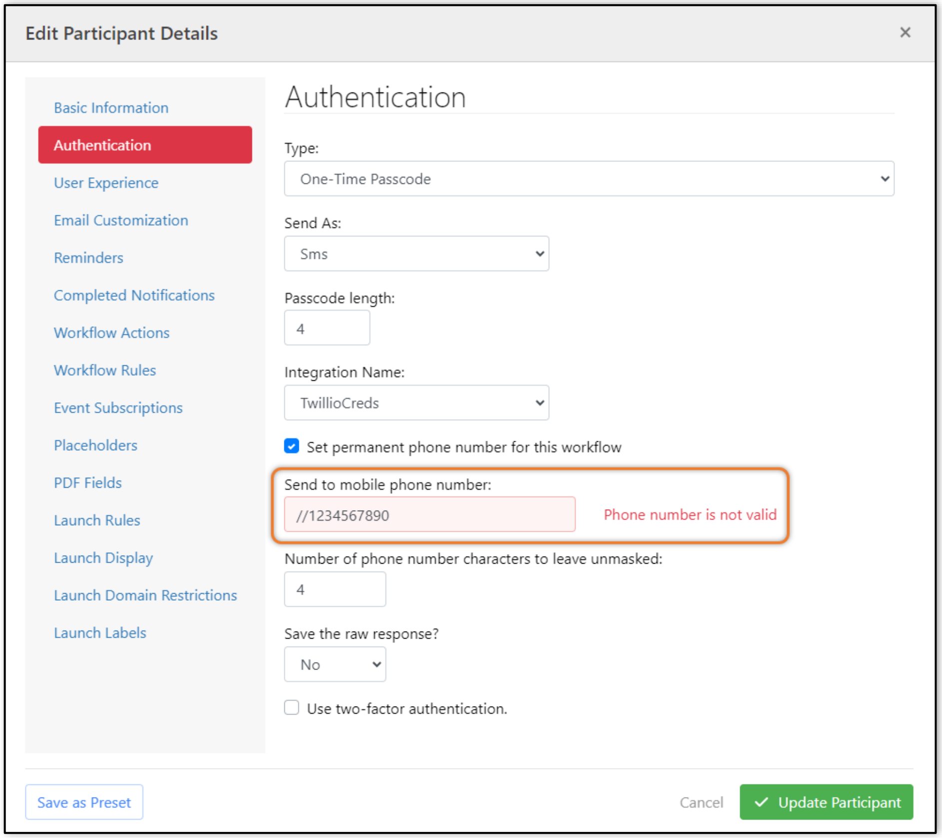
[PEP-6231] - Fixed issue where the Profile Editor would keep the Updated Password checkbox enabled and would reopen on the Password tab after a user clicks on the cancel button. The Profile Editor will open on the Basic Information tab every time it is opened.

[PEP-6218] - Fixed issue where when the Final Email participant toggle is enabled the Include Docs toggle should also be enabled automatically but is not. When the Final Email participant toggle is enabled, the user should be able to enable or disable the Include Docs toggle. Please see the referenced setting in the image below.



Release Notes

[PEP-6173] - Fixed issue where phone validation would intermittently stop working for Mobile authentication when setting it for a new participant. *Mobile* Authentication has been renamed to *One-Time Passcode*. Please see the image below for an example of phone number validation working correctly.



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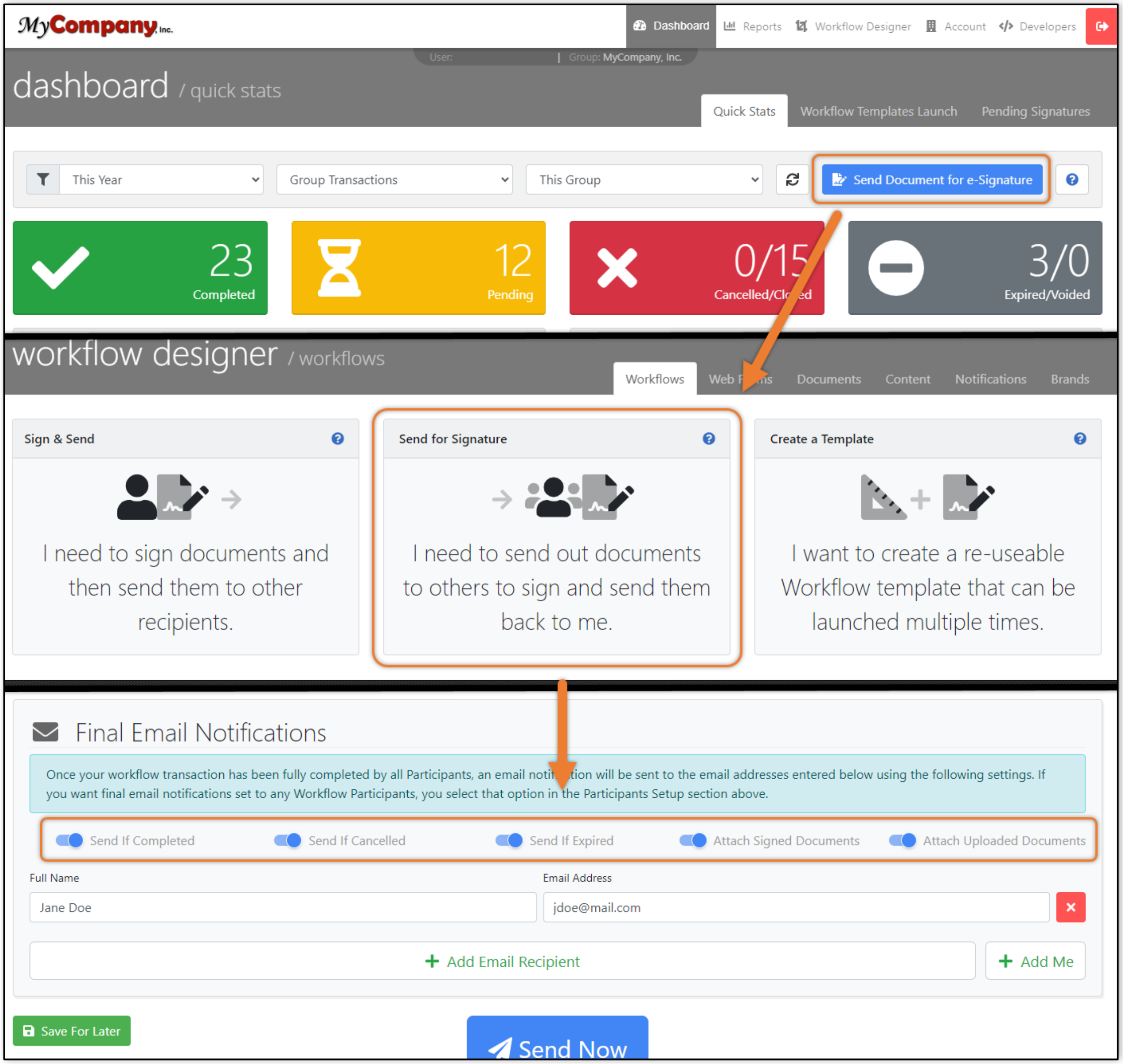
v5.16.7 Release *Production Release Date: 7/13/2023*

Bug Fixes

[PEP-6728] - Fixed issue where the toggle buttons within the Final Email Notifications section would not properly update for *Send for Signature* ad hoc Workflows. Please see the image below for additional information.

Release Notes



[PEP-6722] - Fixed issue where the signing UI could get hung indefinitely if it could not connect to an external resource. Added request timeout into the Control Panel and Signing UI to fix the resource issue.

[PEP-6721] - Fixed issue where the document service would report and log an error that was not an actual error. Updated the locking strategy so multiple services would not cause the error to be reported.

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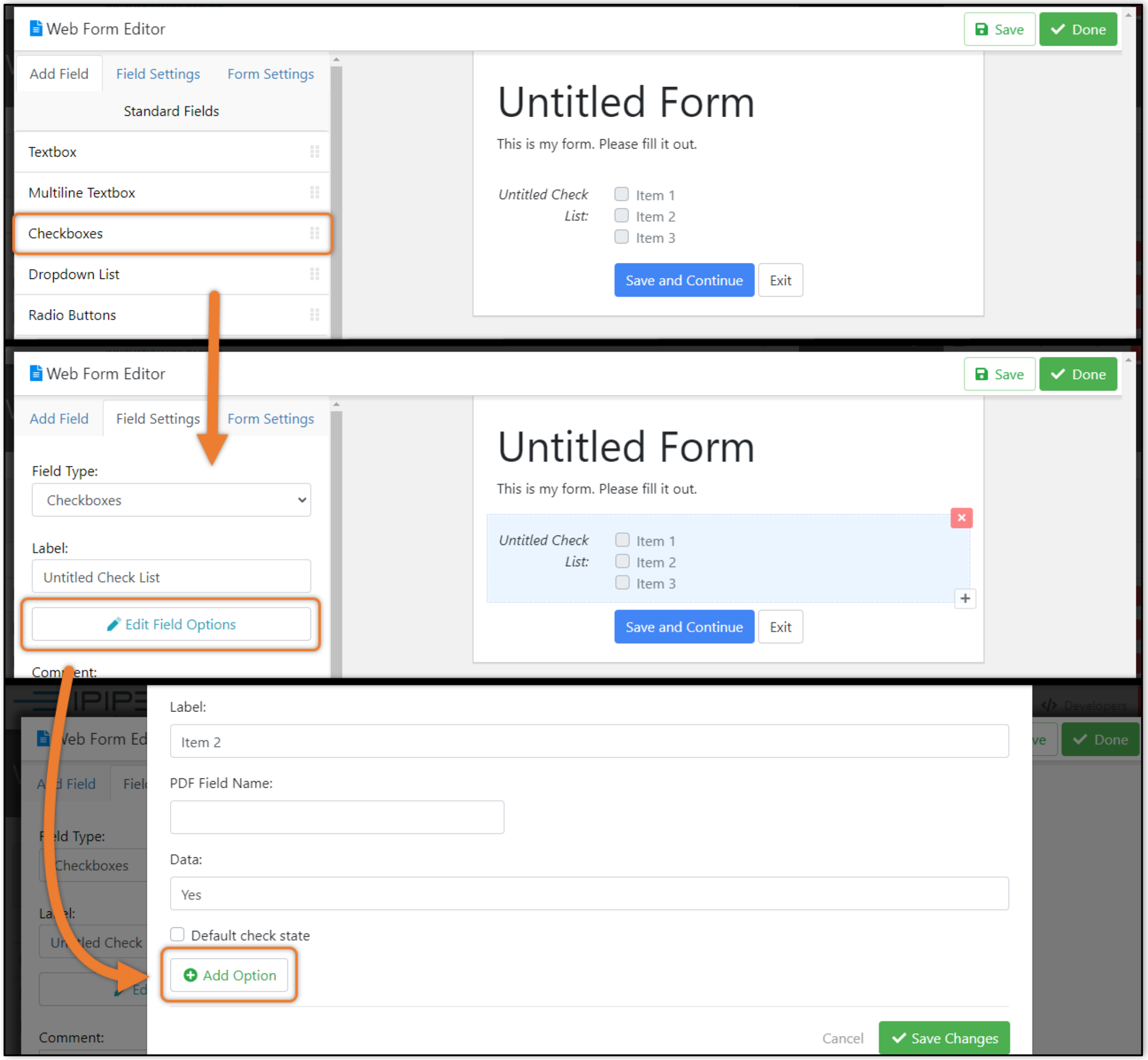
v5.16.6 Release *Production Release Date: 6/1/2023*

Bug Fixes

[PEP-6702] - Fixed issue where checkbox options could not be added to a Web Form. The default checkbox setting includes three options. The Add Options button would not add a new option as it should. Please see the checkbox and Web Form settings referenced below.

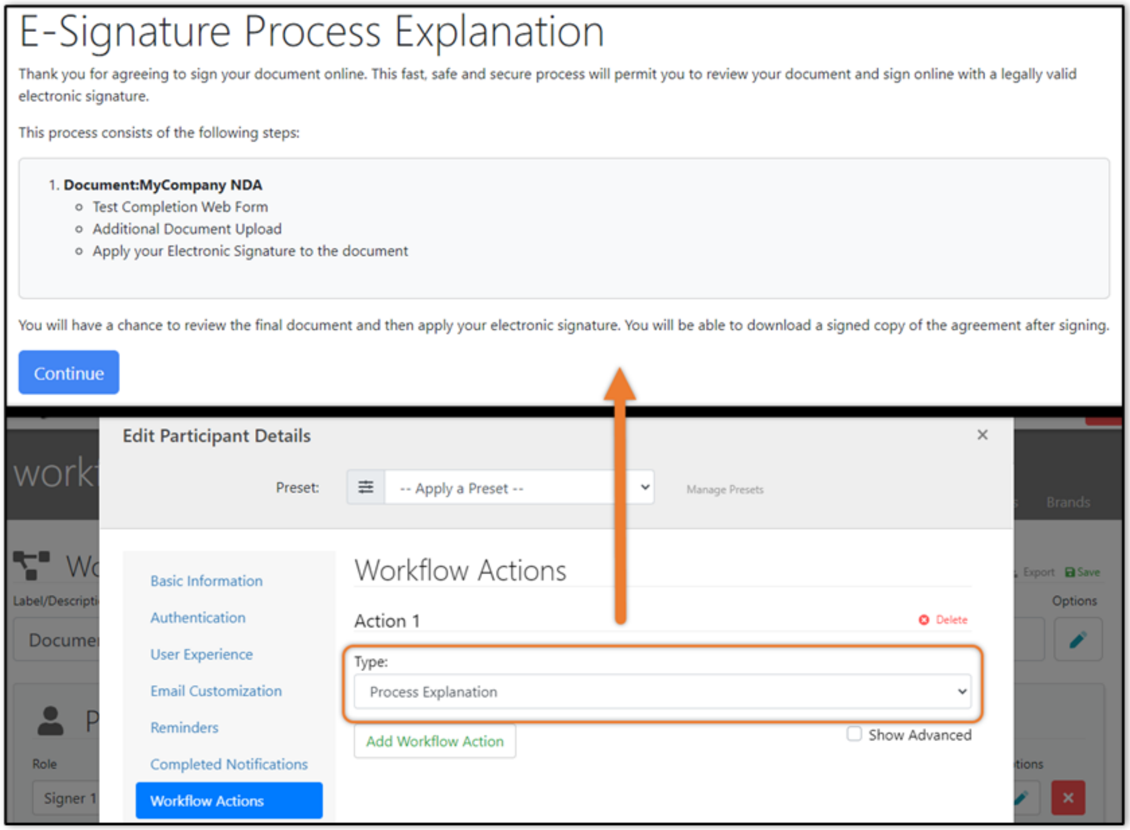
Release Notes



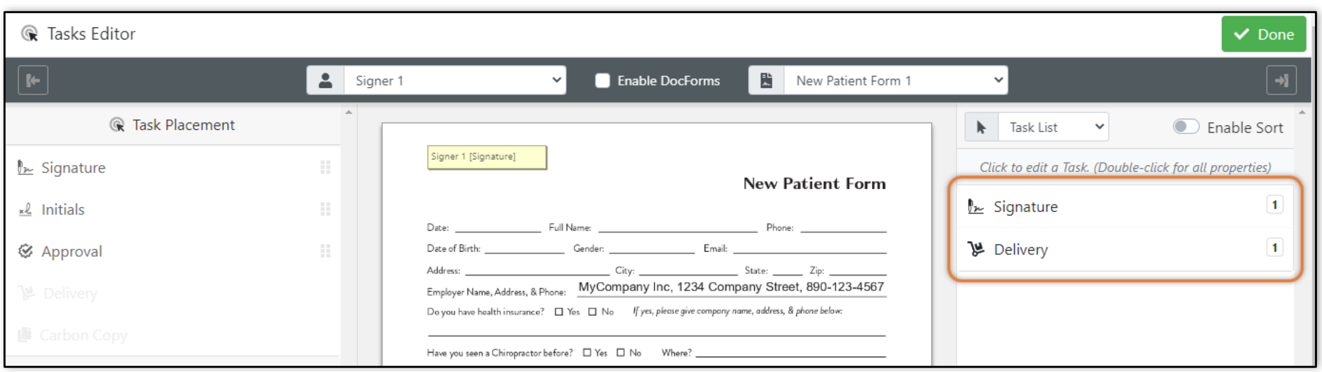
[PEP-6701] - Fixed issue where the CreateTransaction() API request would fail if it contained multiple actionable tasks with no placement information. The resulting error message seen stated "Can't locate coordinates: Field 'field_name' not found".

[PEP-6691] - Fixed issue where Carbon Copy and Delivery tasks would appear on the Process Explanation screen when they should not. Please see the image below for the Workflow Action settings and an example of the Process Explanation Screen.

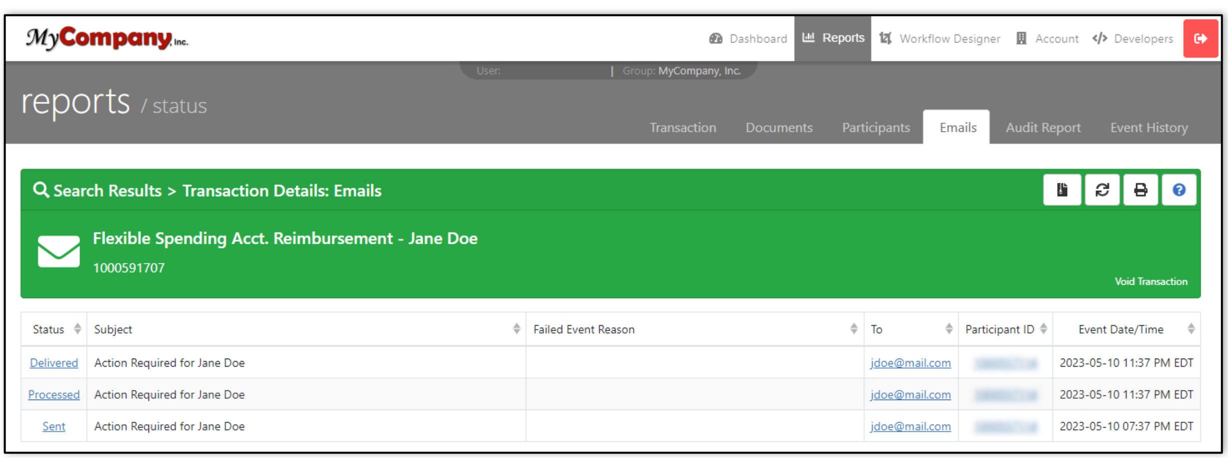
Release Notes



[PEP-6685] - Fixed issue where transactions would be stuck in a pending status if a participant was assigned a Signature task followed by a Delivery task. Please see the image below for an example of the assigned tasks.



[PEP-6681] - Fixed issue where transaction emails would not load correctly within the Emails tab of the transaction details. Please see the image below for an example of the Emails tab referenced.



Release Notes

v5.16.5 Release **Production Release Date: 5/18/2023**

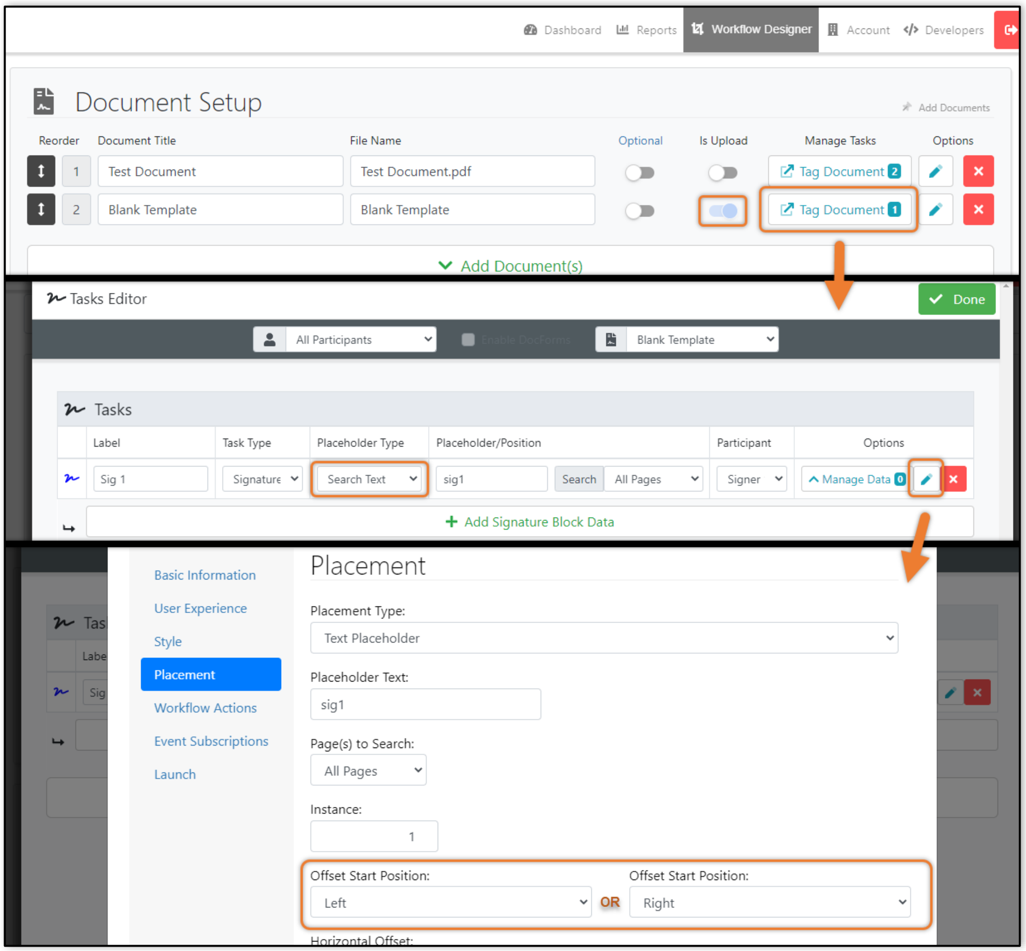
Bug Fixes

[PEP-6637] - Fixed issue where transactions could not be created when encrypted PDF/A documents were uploaded or used.

v5.16.4.1 Release **Production Release Date: 5/4/2023**

Bug Fixes

[PEP-6606] - Fixed issue where the vertical location would be shifted down by two pixels when placing the signature or signature data using the search text functionality, *Offset Start Position,* set to “Left” or “Right”. This fixes the specific settings referenced in addition to what was fixed in PEP-6572. Please see the image below for the settings referenced.



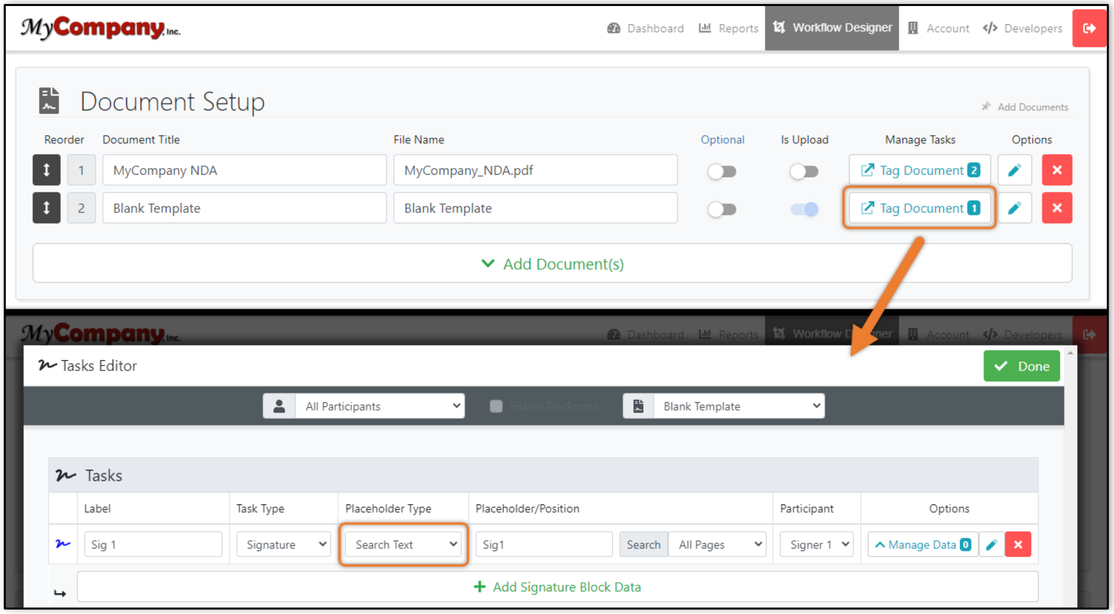
v5.16.4 Release **Production Release Date: 5/4/2023**

Bug Fixes

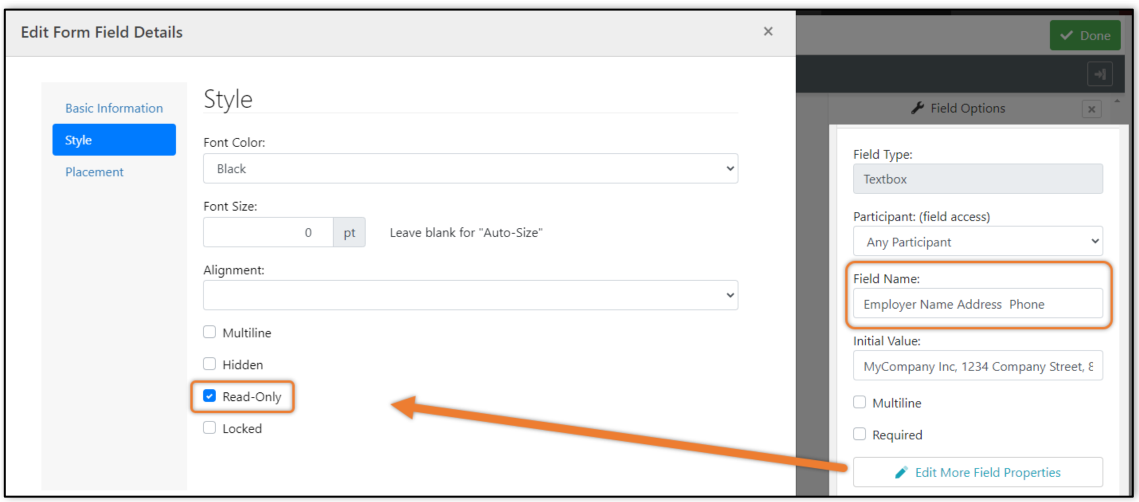
[PEP-6594] - Fixed issue in the new Signing UI which would cause performance issues on high-volume systems regarding the deletion of expired security tokens.

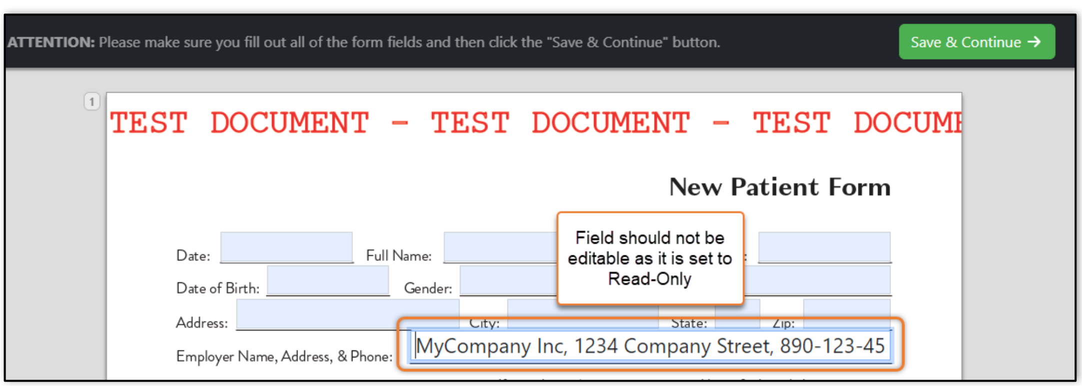
[PEP-6572] - Fixed issue where the vertical location would be shifted down by two pixels when placing the signature or signature data using the search text functionality. Please see the image below for the settings referenced.

Release Notes



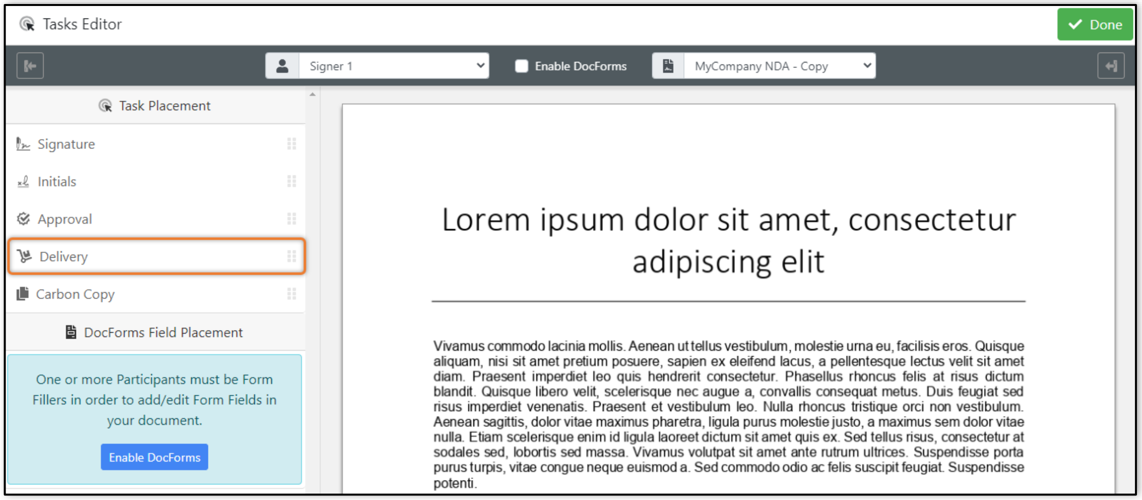
[PEP-6569] - Fixed issue where read-only form fields would be editable if the field name contained spaces. Please see an example and settings referenced in the images below.

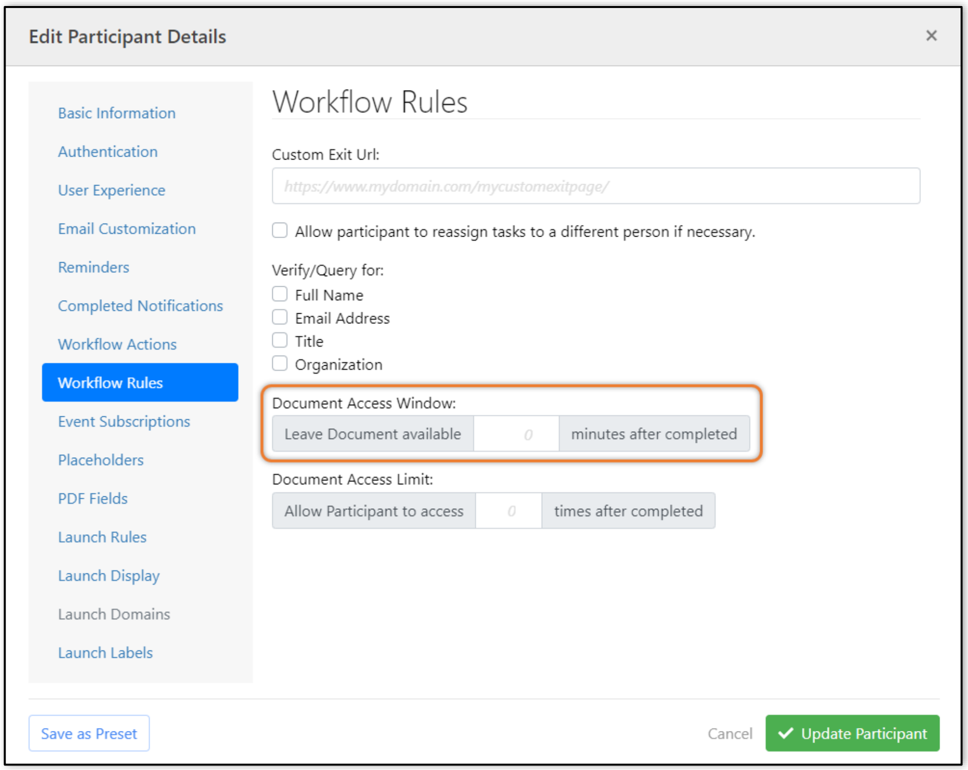




[PEP-6560] - Fixed issue where transactions with only a delivery task, and the Document Access Windows set to any value other than zero, would show a “process cannot continue” error message instead of properly loading the exit page. Please see the images below for the referenced settings.

Release Notes





[PEP-6472] - Fixed issue where pages intermittently aren't saved to the database. Ensured that the signing process can continue if rows are missing from the Page table in the database.

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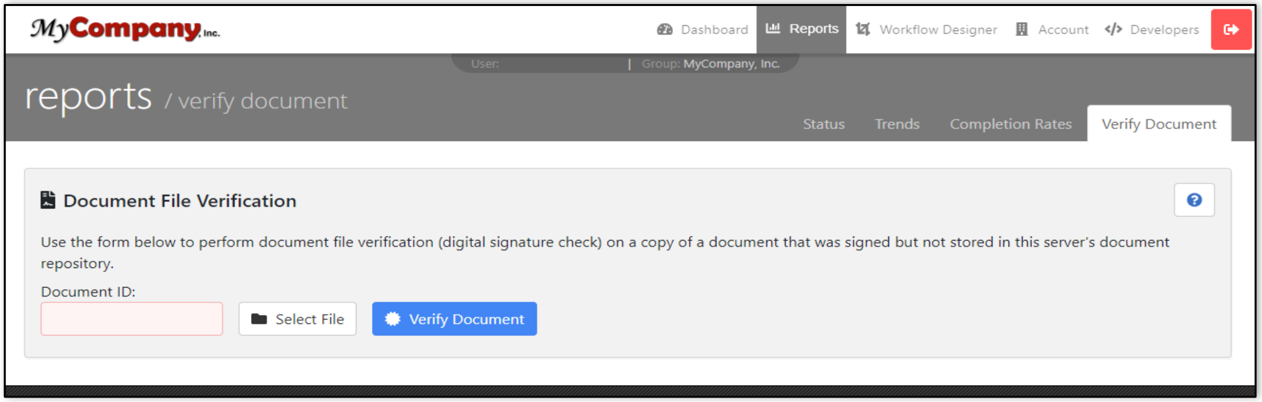
v5.16.3 Release *Production Release Date: 4/20/2023*

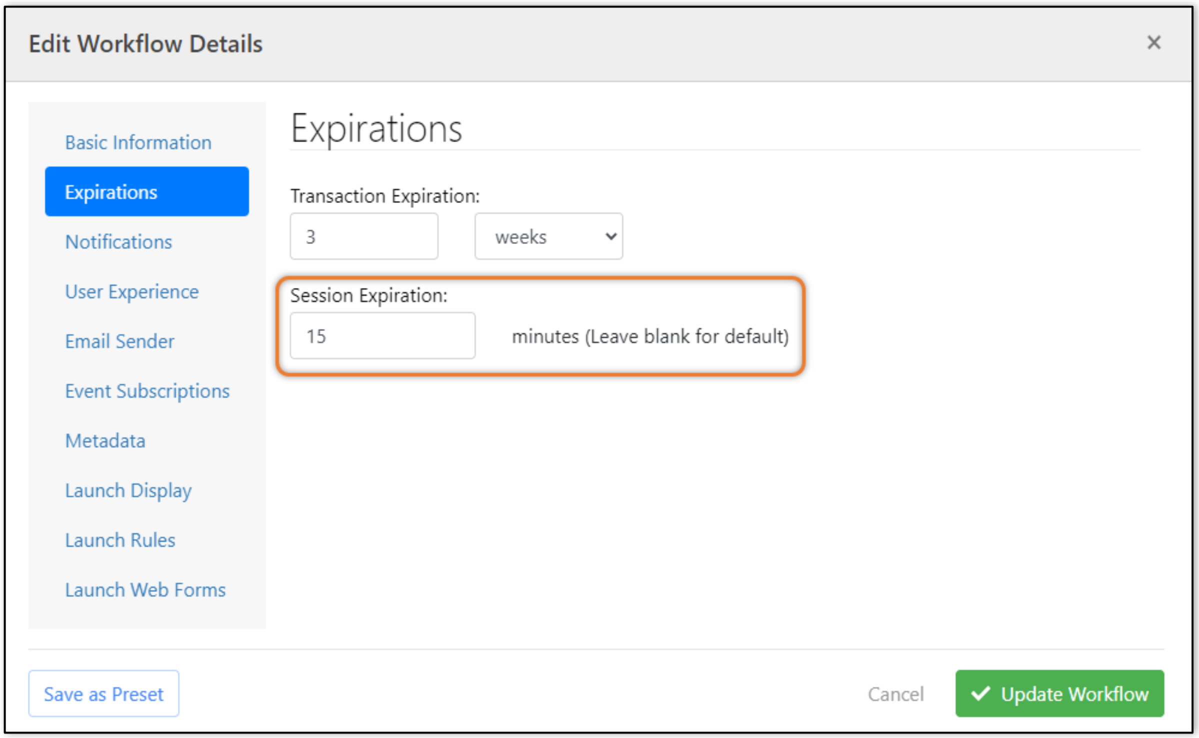
Bug Fixes

[PEP-6495] - Fixed issue where when attempting to verify an HTML document the user would receive an error message and the document was unable to be verified. Please reference the Verify Document feature in the image below.

Release Notes

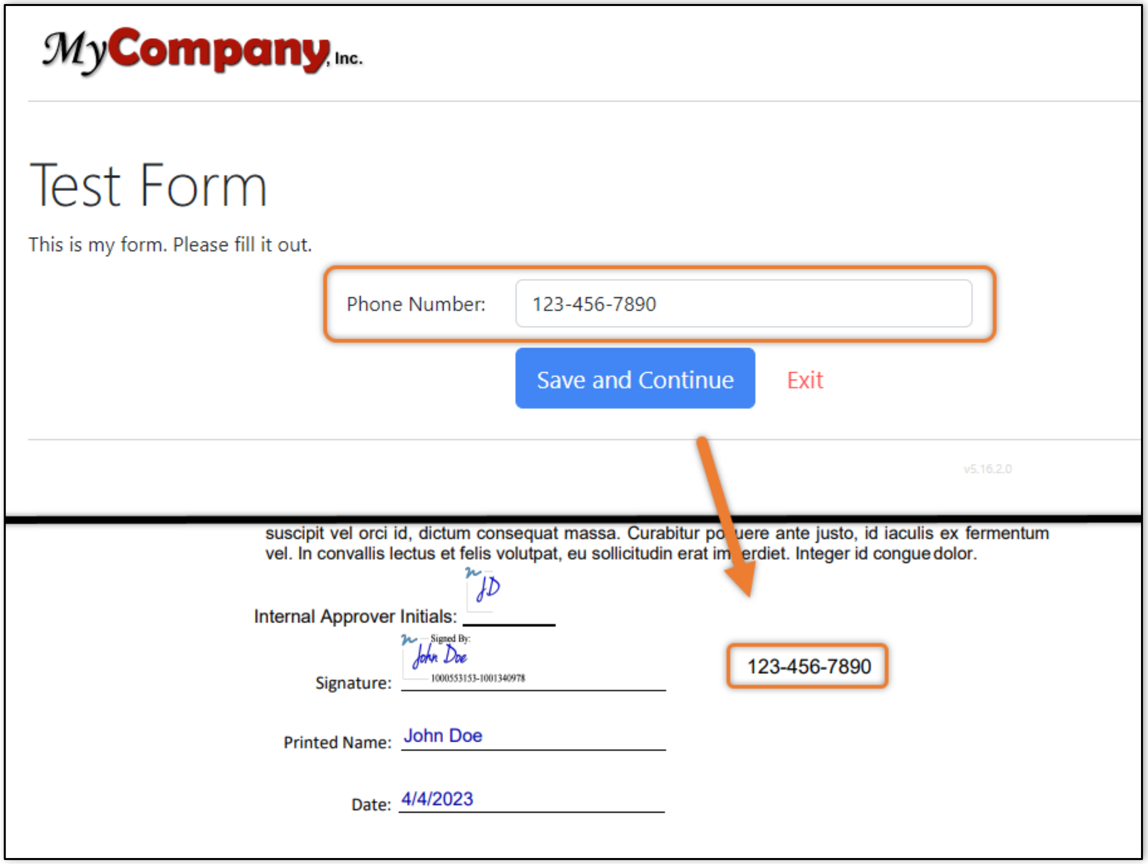


[PEP-6480] - Fixed issue where if a user hit the session expiration limit, the timeout modal would not appear on screen. The timeout modal should appear on screen if the user exceeds the session expiration set. Please see the setting referenced in the image below.



[PEP-6302] - Fixed issue where phone numbers entered in Web Forms would lose their formatting when transferred onto a document. Please see the example image below of a phone number keeping it's formatting after being entered into a Web Form.

Release Notes



v5.16.2.1 Release *Production Release Date: 4/6/2023*

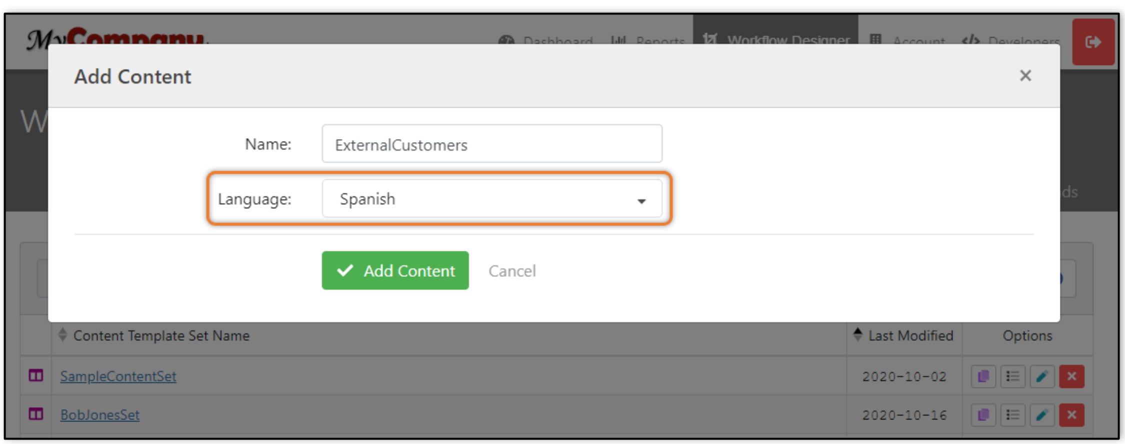
Bug Fixes

[PEP-6550] - Fixed issue where a transaction would not be created successfully when the CreateTransaction() API call would reference the Document Source via the FilePath property.

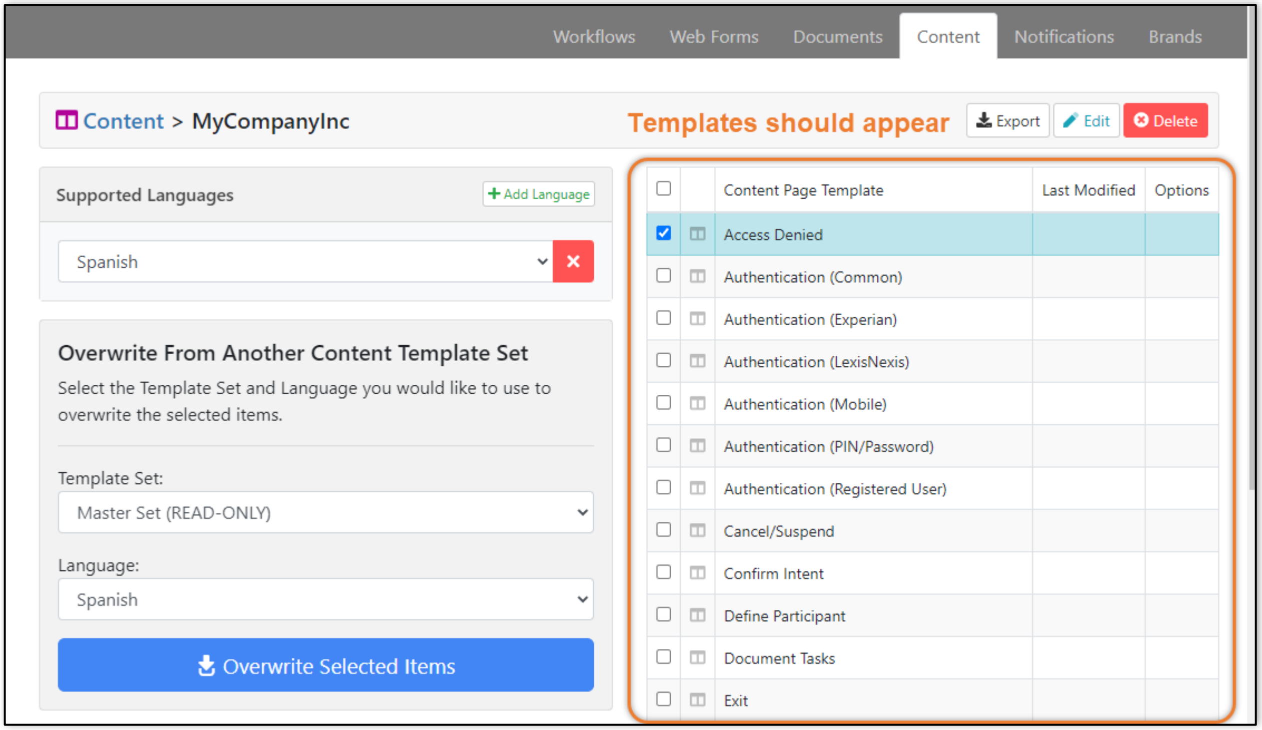
v5.16.2 Release *Production Release Date: 4/6/2023*

Bug Fixes

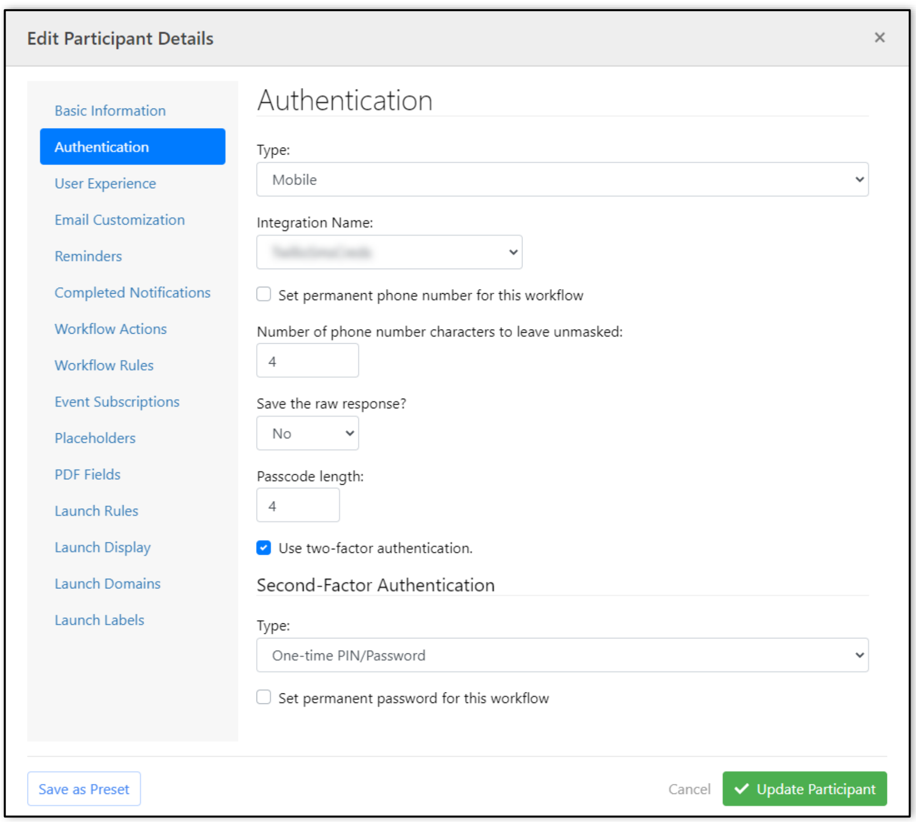
[PEP-6382] - Fixed issue where when creating a Content or Notification set with a default language that is not English, the templates would not load correctly. Please see the example images below of a Content Set and templates using a non-English language as the default language.



Release Notes

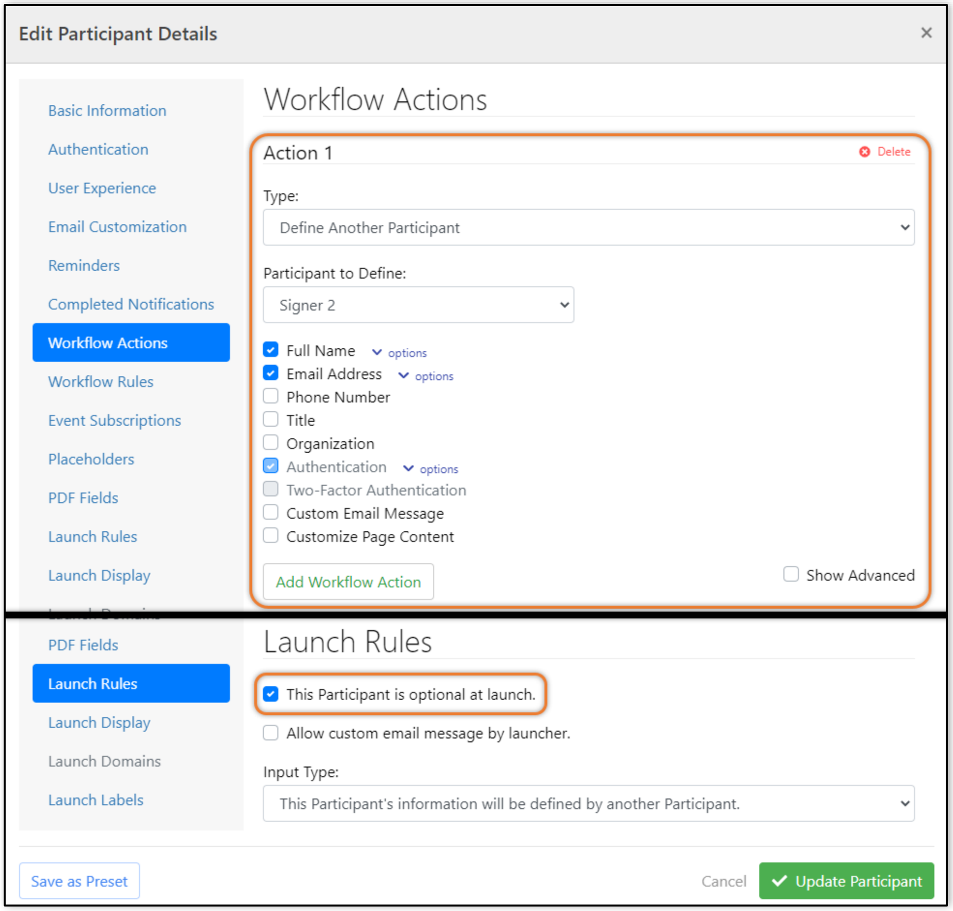


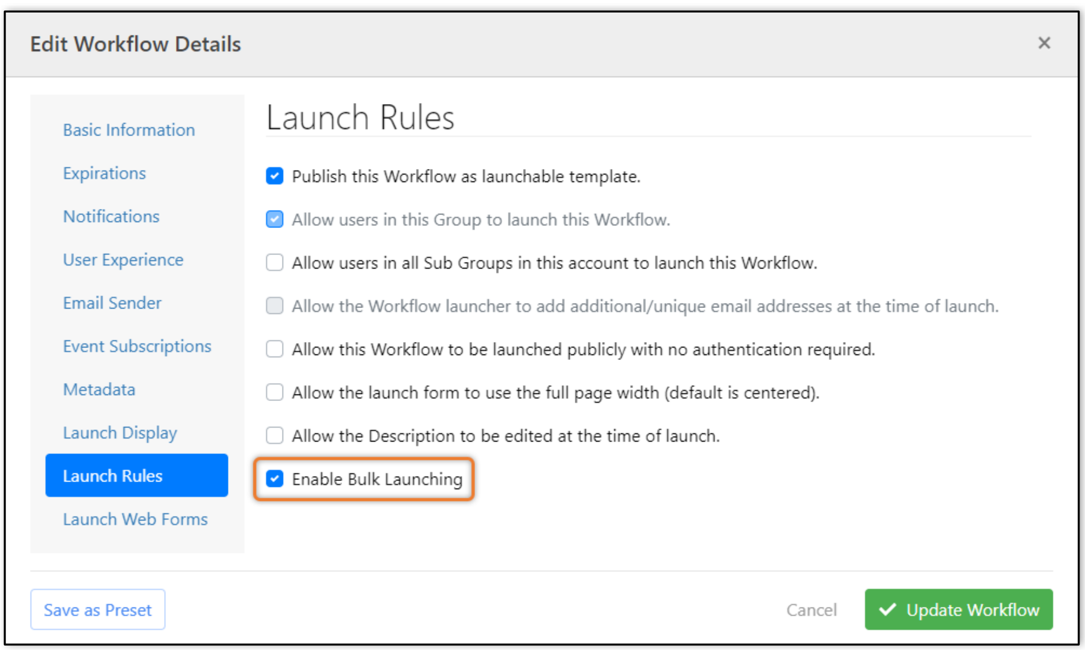
[PEP-6353] - Fixed issue where if mobile authentication was set as the first method of authentication in a two-factor authentication workflow, the second authentication method would be ignored and or skipped as if it was not set. Please see the example image below for more information.



[PEP-6260] - Fixed issue where bulk launch was not allowing optional participants, if defined by another participant. Please see the example images below for the Participant and Workflow settings referenced.

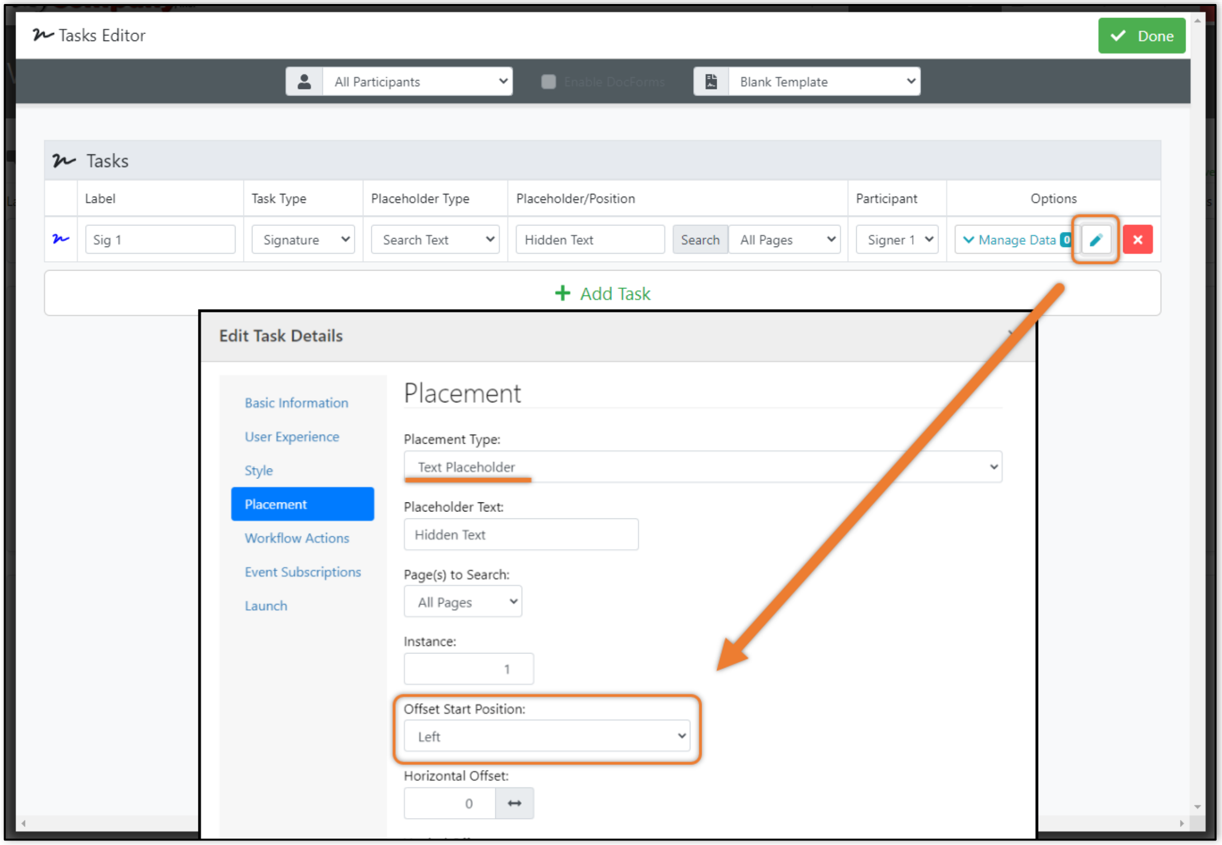
Release Notes





[PEP-6249] - Fixed issue where the Offset Start Position drop-down should have a default value set to *Left* but was blank. Please see the image below for more details.

Release Notes



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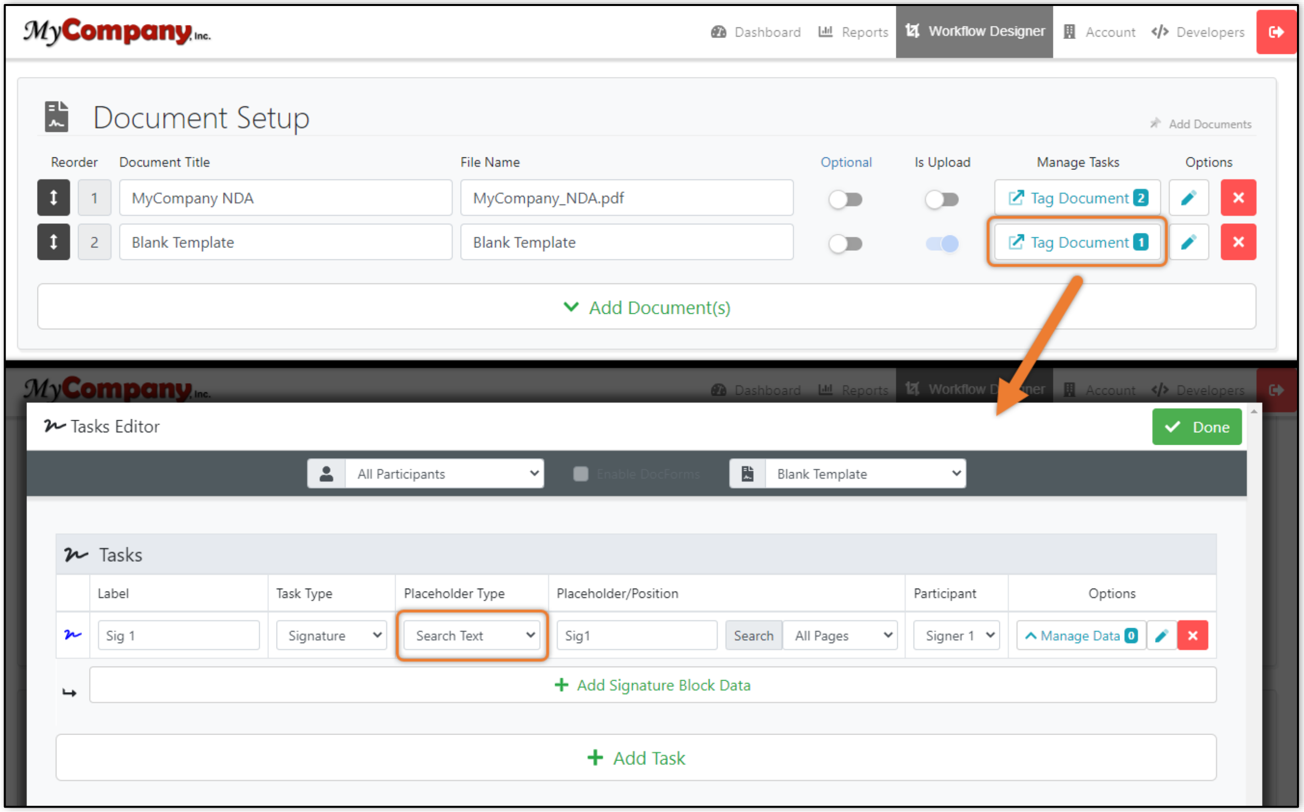
v5.16.1.5 Release *Production Release Date: 4/6/2023*

Bug Fixes

[PEP-6483] - Fixed issue where when utilizing the Search Text functionality the signature would not be placed in the correct location on a document. Please see the image below for the settings referenced.

Release Notes



v5.16.1.4 Release *Production Release Date: 3/17/2023*

Bug Fixes

[PEP-6431] - Fixed issue where some text characters weren't being found when using the search text signature placement method when creating transactions.

[PEP-6427] - Fixed issue where duplicate fields on documents were being incorrectly omitted from the DocForms page when signing.

[PEP-6419] - Fixed issue where when using FormField_InstanceOfField property for signature placement some signatures would not be placed on the document correctly.

v5.16.1.3 Release *Production Release Date: 3/8/2023*

Bug Fixes

[PEP-6413] - Fixed issue to accommodate documents containing signatures or all required text fields.

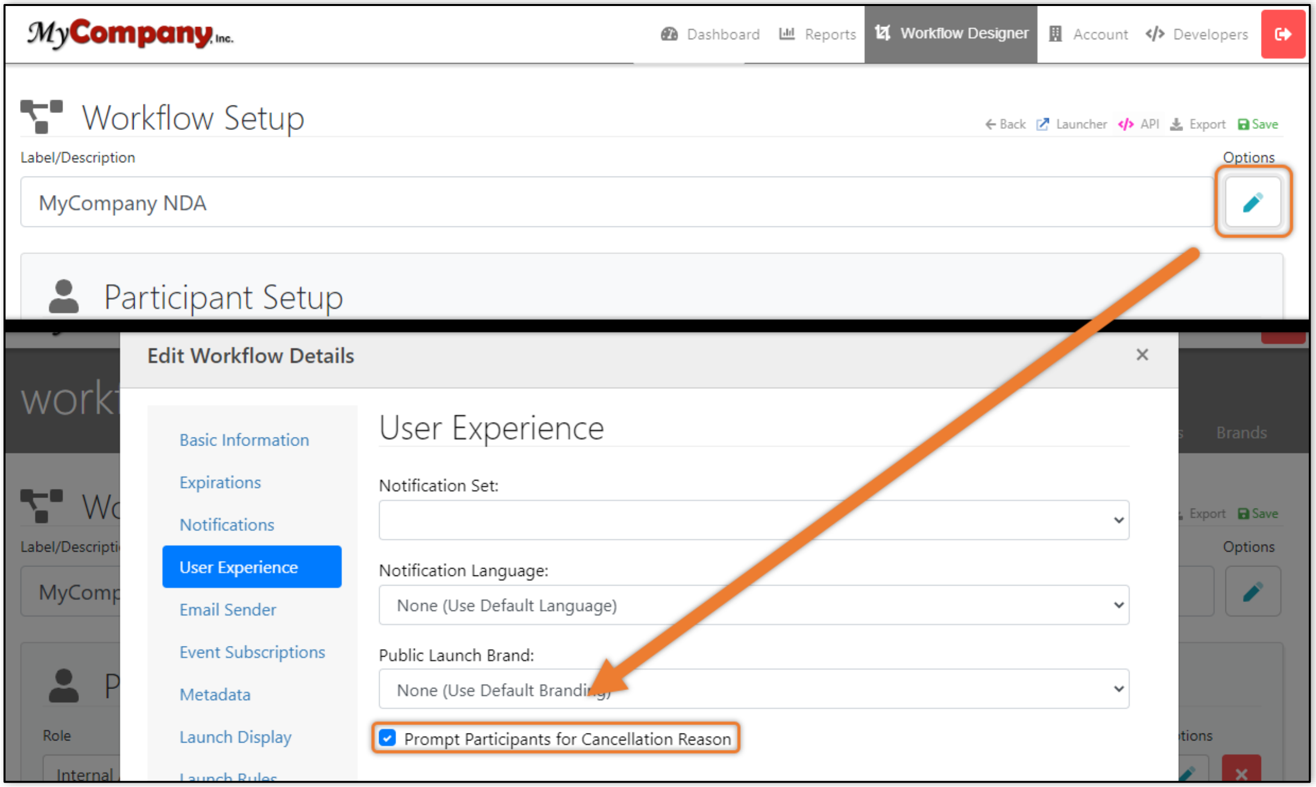
v5.16.1.2 Release *Production Release Date: 3/5/2023*

Bug Fixes

[PEP-6399] - Fixed issue where if a workflow had a no action task as the first item, the system would not properly move forward to complete the signing process and the user would get stuck on a blank screen.

[PEP-6397] - Fixed issue where a participant cancel comments would not properly save to the LastComment object in the database. Please see the cancel behavior setting referenced in the image below.

Release Notes



[PEP-6388] - Fixed issue where when uploading a document to a Workflow with all fields required, fields would not be imported properly. None of the fields would appear on the document during the signing process. The fields should have appeared on the document for the participants to enter information and complete the signing process.

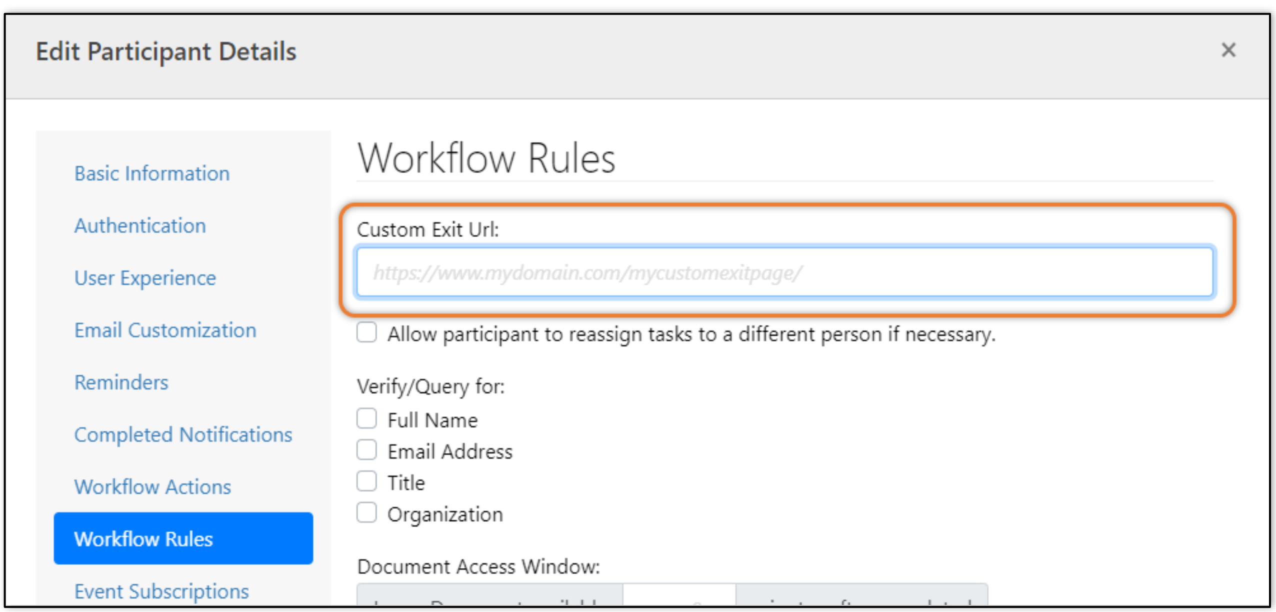
[PEP-6383] - Fixed issue where when uploading a document to a Workflow, DigitalSignature fields were not being imported properly nor recognized when tagging the document.

---

v5.16.1.1 Release *Production Release Date: 3/2/2023*

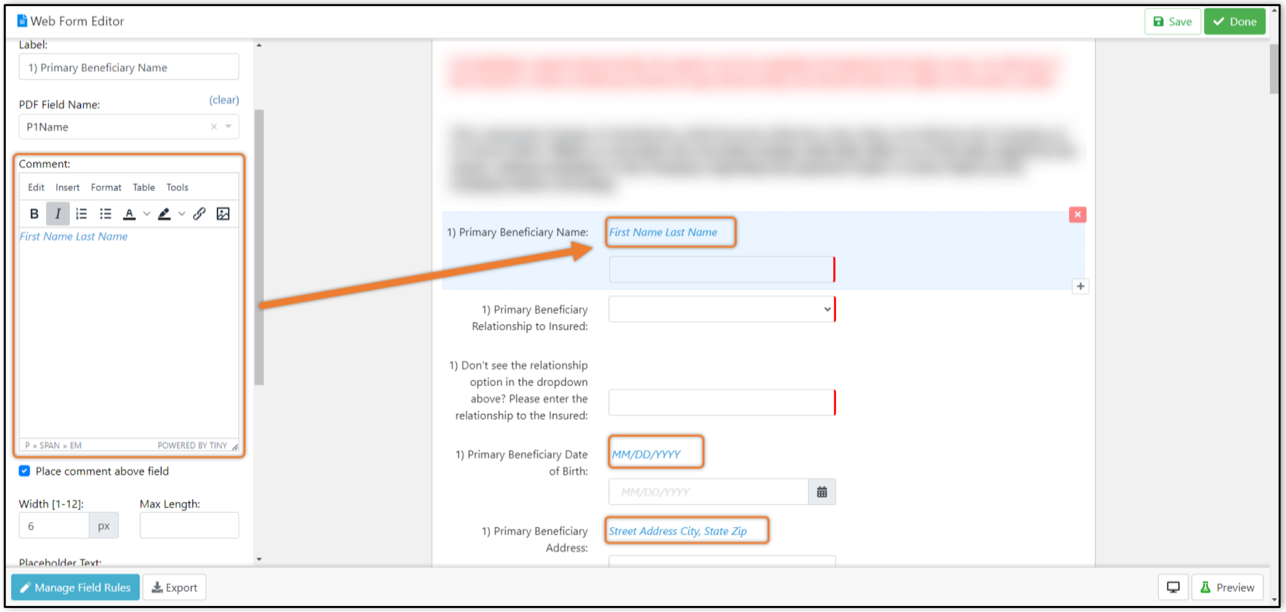
Bug Fixes

[PEP-6387] - Fixed issue where upon completing a workflow with a custom Exit URL with capitals after the domain, the user would be incorrectly redirected to a lowercase URL instead. Example: "domain.com/Example" would be incorrectly changed to "domain.com/example". Please see the image below of the setting referenced.



Release Notes

[PEP-6381] - Fixed issue where comments were not properly rendering on Web Forms. Comments should be shown if entered. Please see the image below of examples of comments on a Web Form.



[PEP-6380] - Fixed issue where cancelling a transaction with a custom URL would not properly cancel nor redirect as expected.

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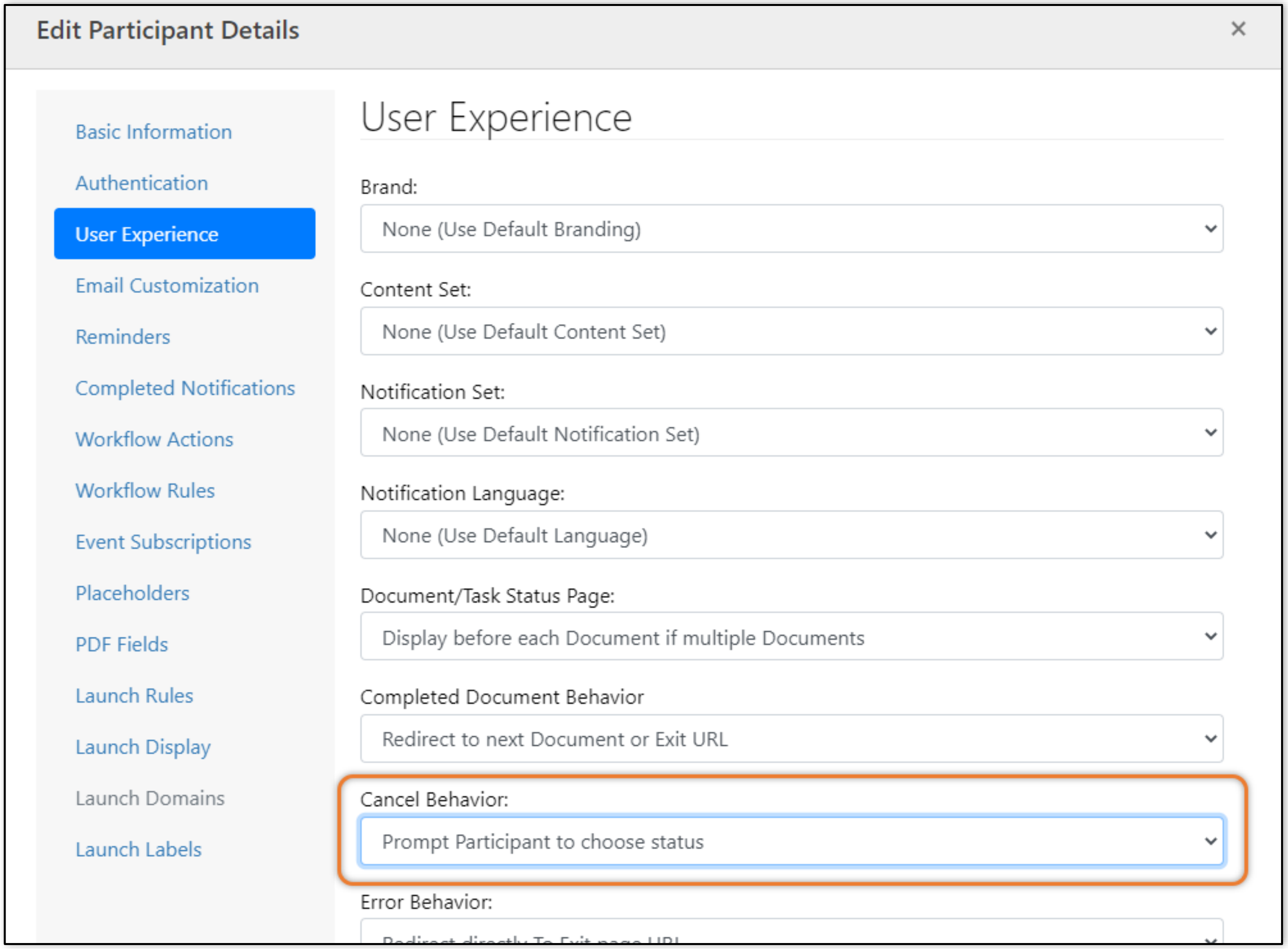
v5.16.1 Release *Production Release Date: 3/2/2023*

Bug Fixes

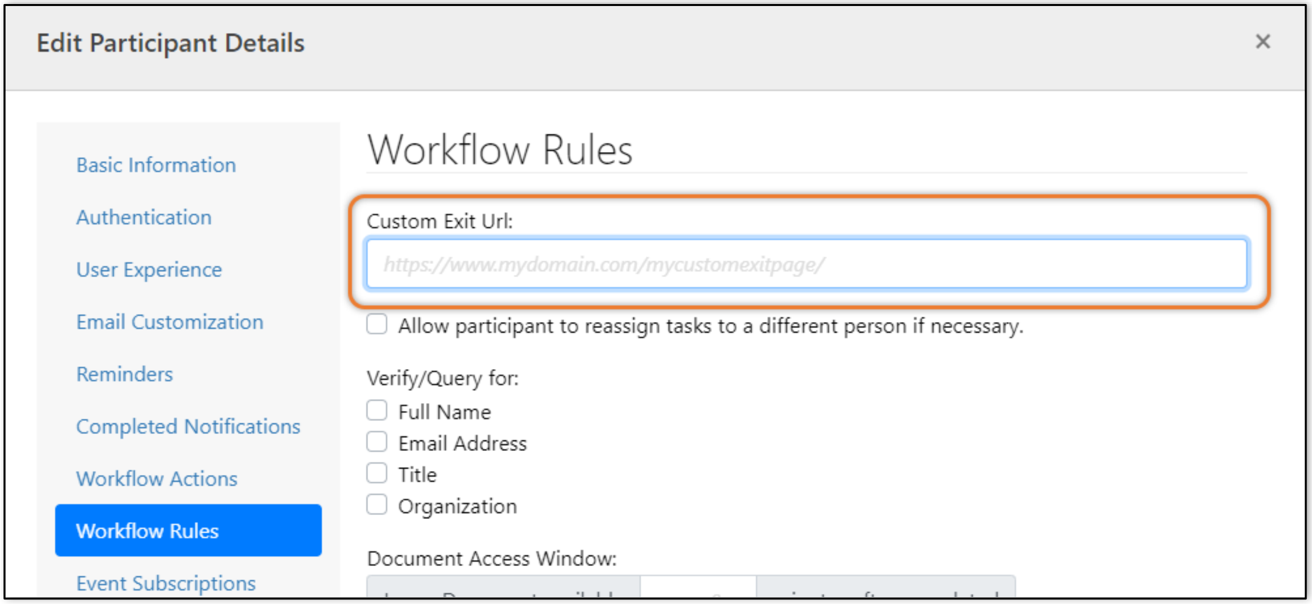
[PEP-6347] - Fixed issue where upon cancelling users were not shown the options to choose to either cancel or suspend the transaction when the cancel behavior was set to "Prompt Participant to choose status". Please see the setting referenced in the image below.

Release Notes

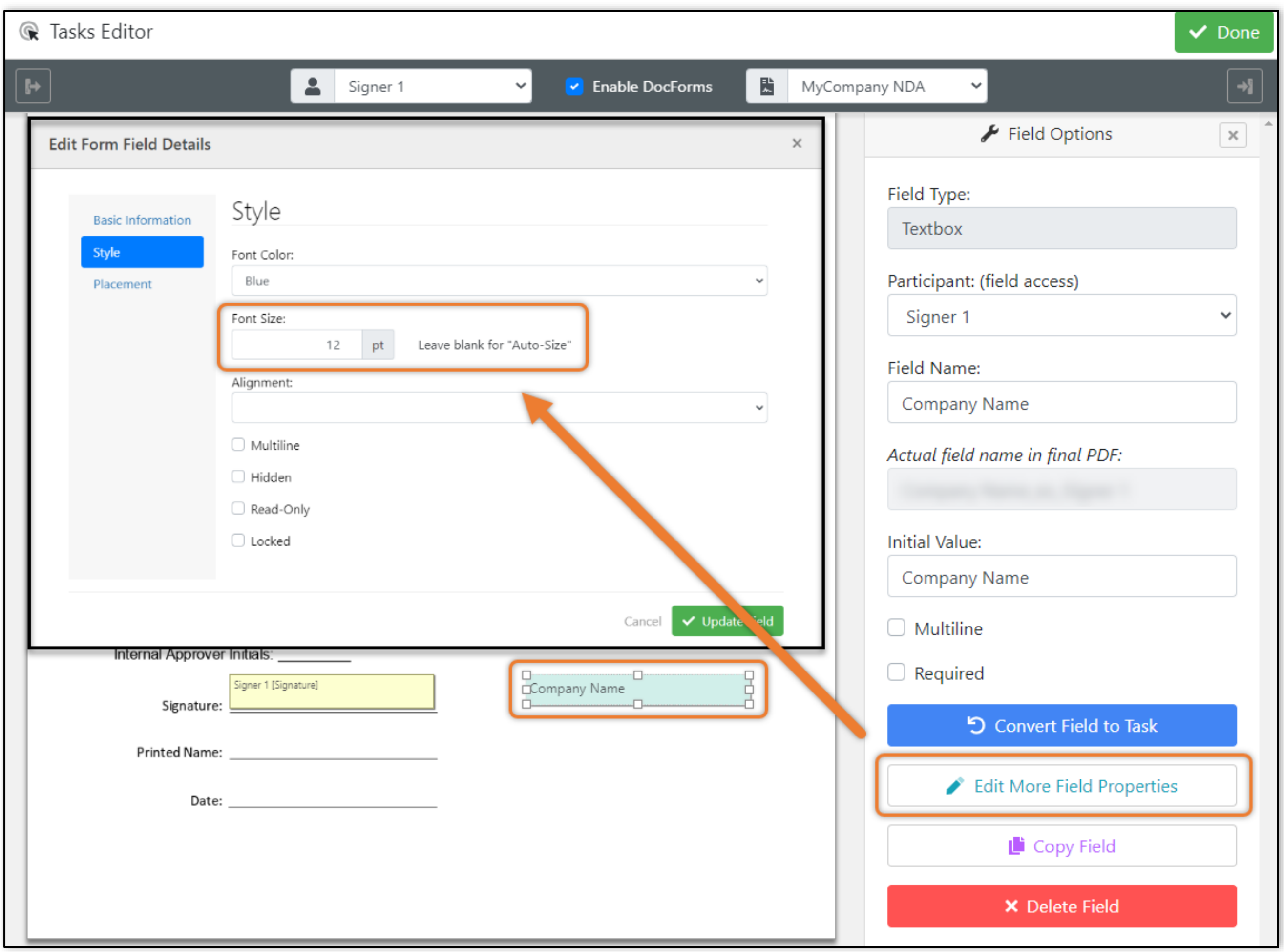


[PEP-6329] - Fixed issue where if a participant has a custom exit URL set, any delivery task would not complete and stay in a Pending status. Please see the images below of the settings referenced.

Release Notes

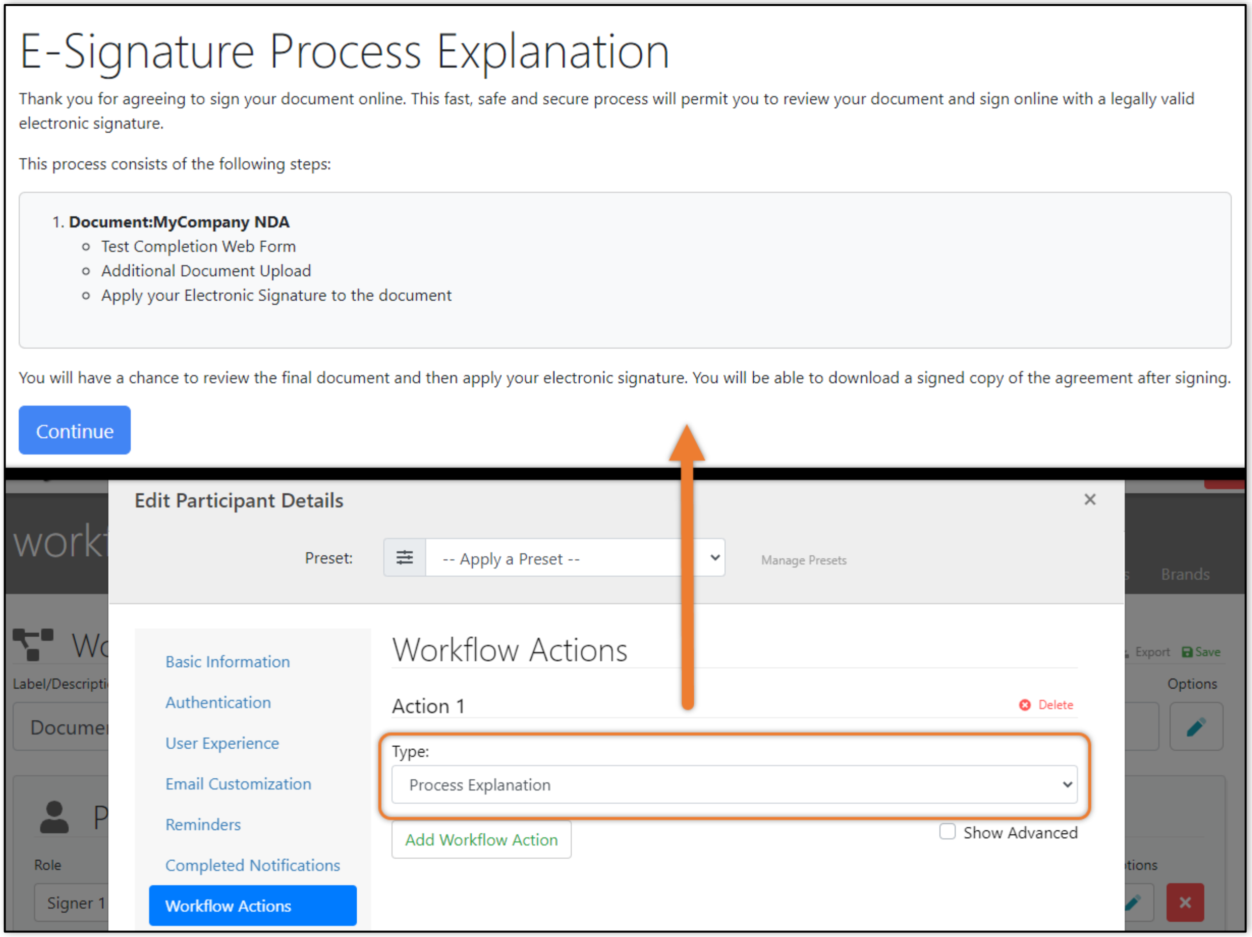


[PEP-6303] - Fixed issue where DocForm fonts during signing were being ignored in the final Document. The font size in the DocForm will now properly match the font size as styled from the control panel. Please see the example font size setting for a textbox in the image below.

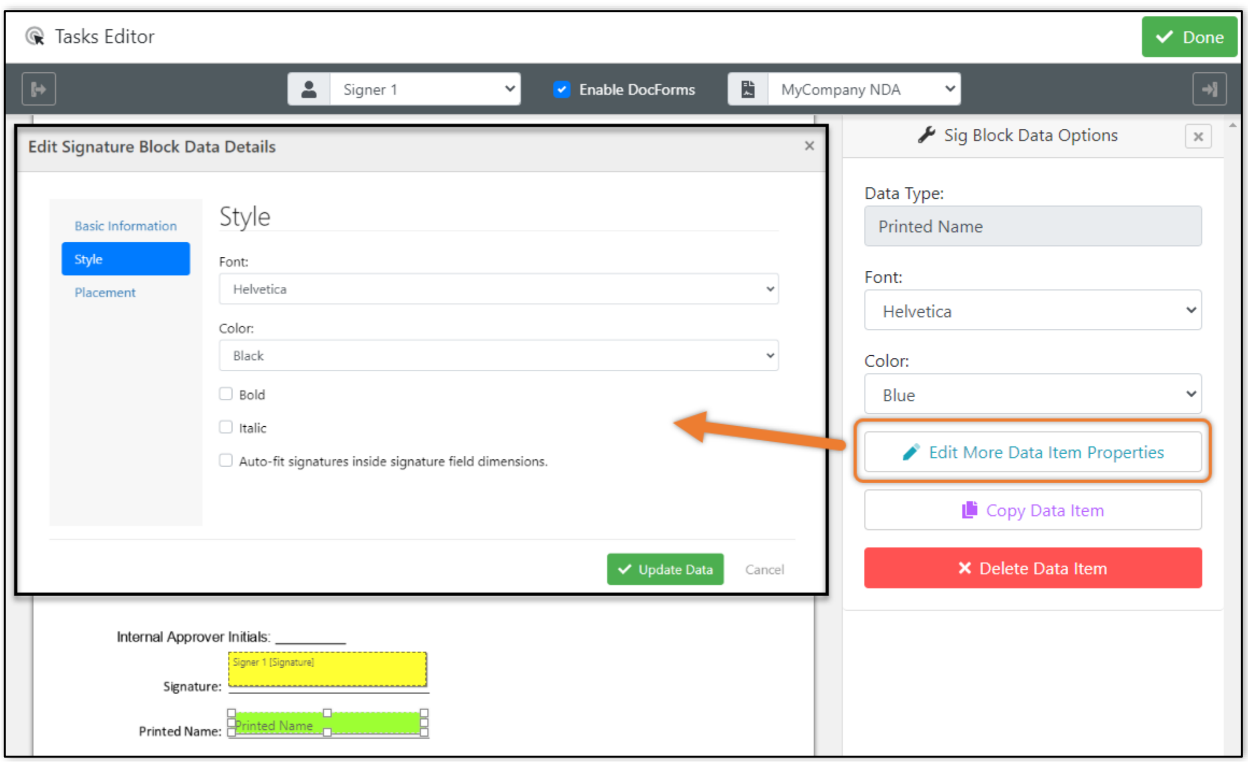


[PEP-6298] - Fixed issue where the Process Explanation screen would not display the correct tasks for each document in a transaction. Please see the referenced settings and example Process Explanation screen below.

Release Notes

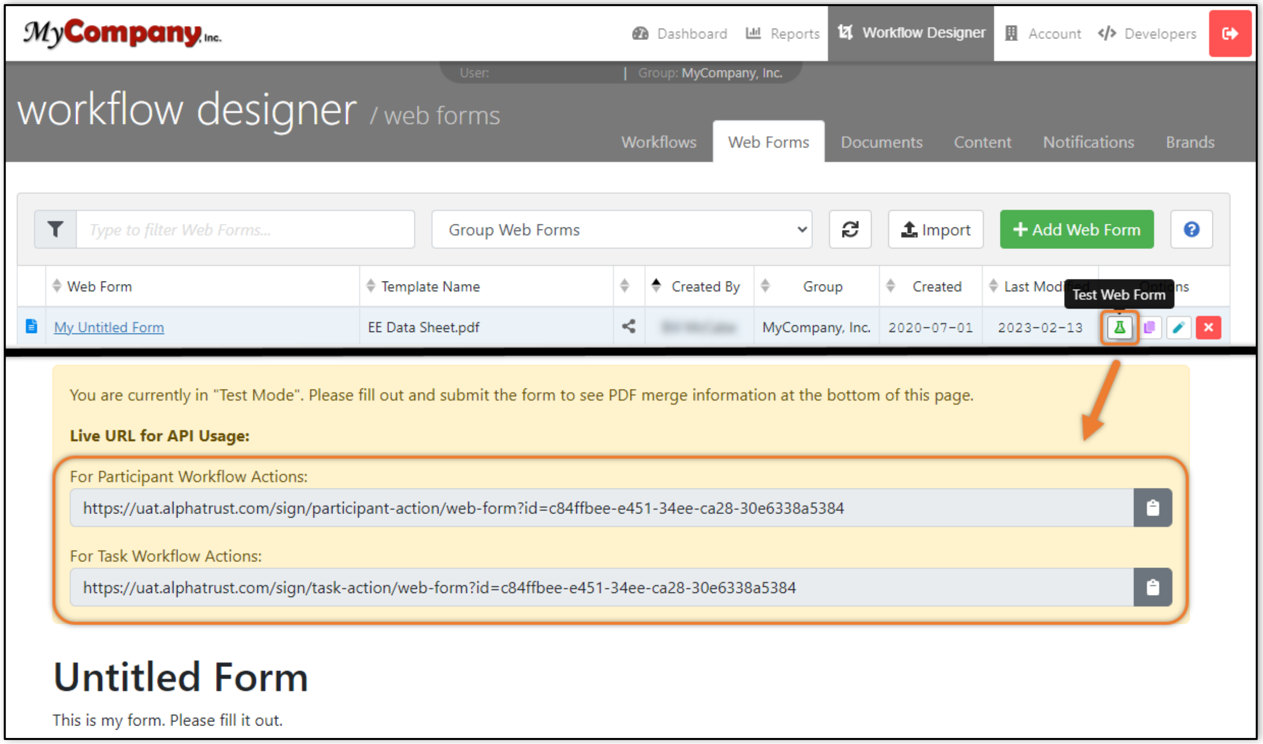


[PEP-6286] - Fixed issue where when attempting to update Signature Block Data, changes would not save. When using the "Edit More Data Item Properties" modal to edit a Signature Block Data element the element will now properly update and save. Please see the example *Printed Name* Signature Block Data in the image below for more details.

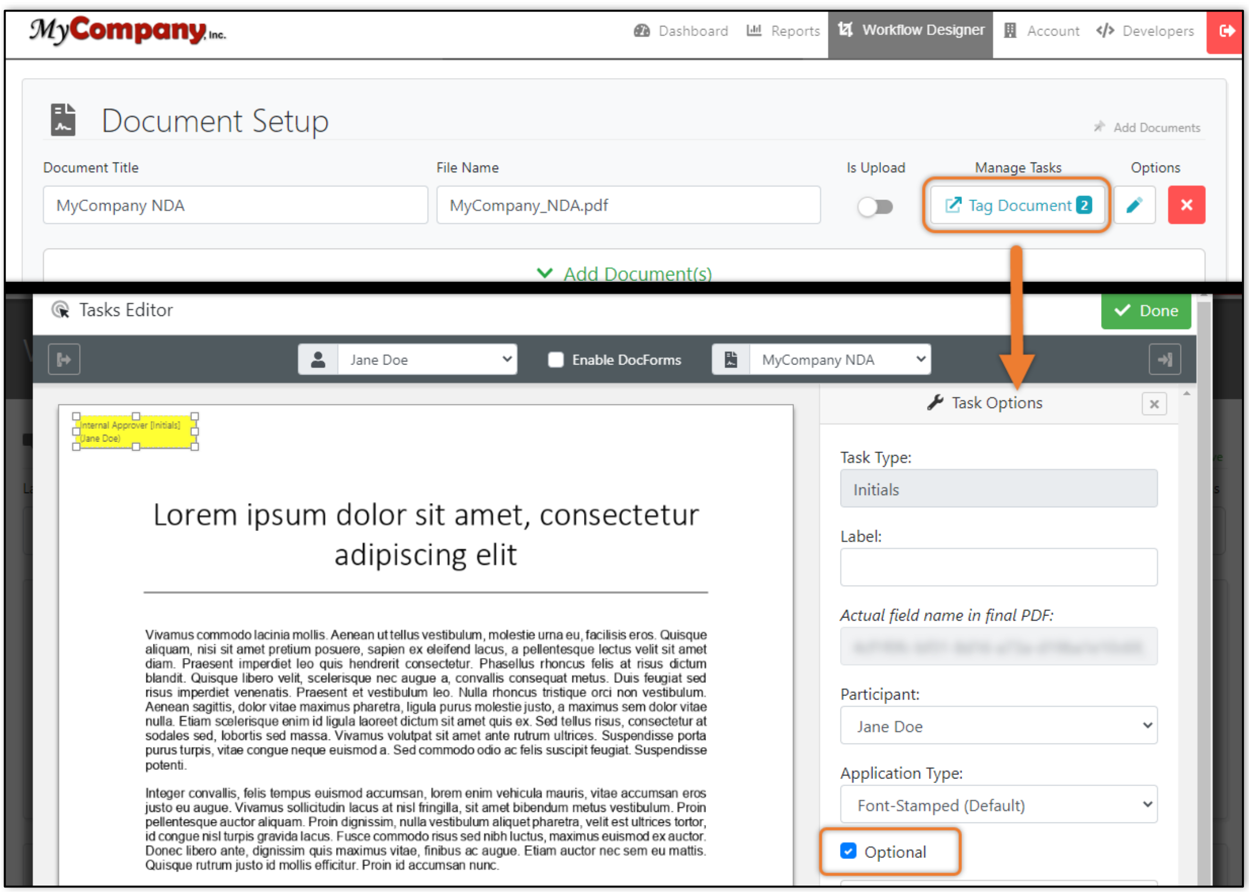


Release Notes

[PEP-6280] - Fixed issue where the web form test pages API URLs were incorrect. Please see the image below of an example Web Form and test API URLs for more details.

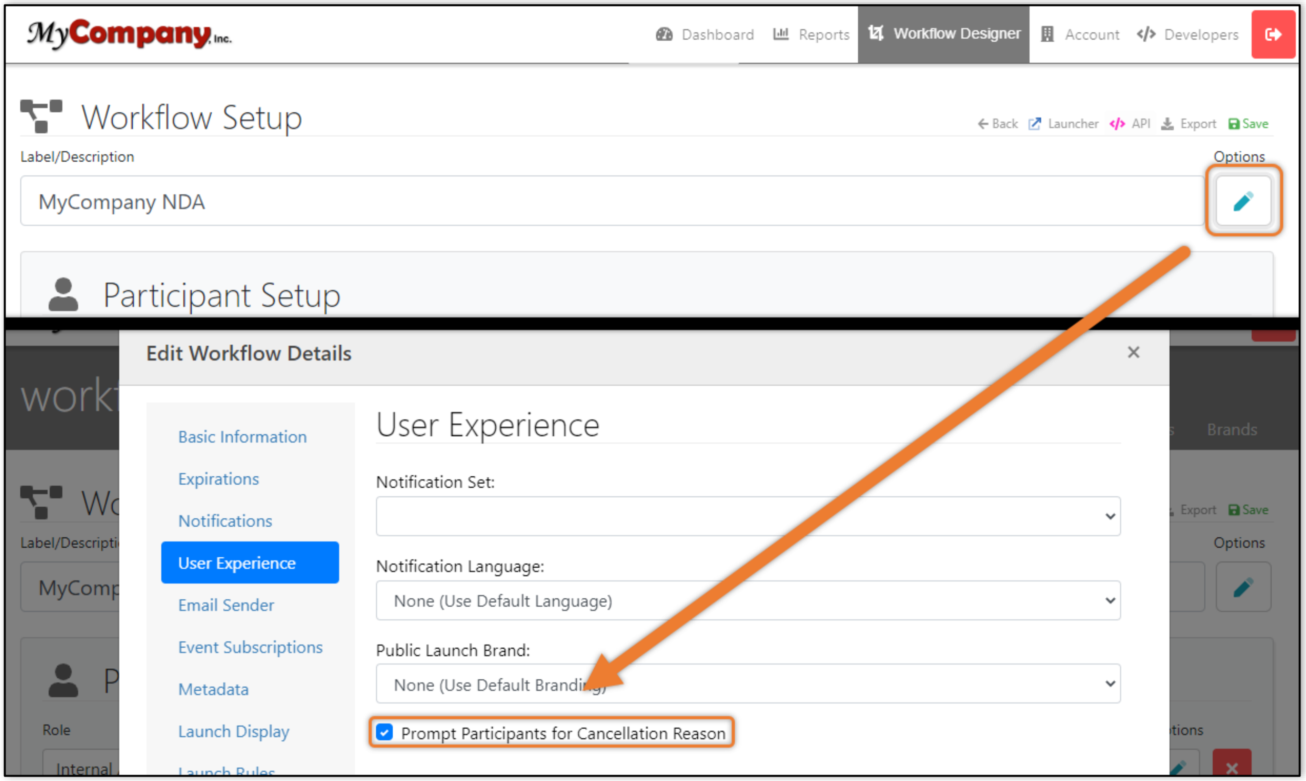


[PEP-6278] - Fixed issue where if a participant cancels on an optional task, the participant is taken to the Exit page and the transaction status is changed to Pending. The Participant should be taken to the next task instead of the Exit page. Please see the optional task setting referenced in the image below.

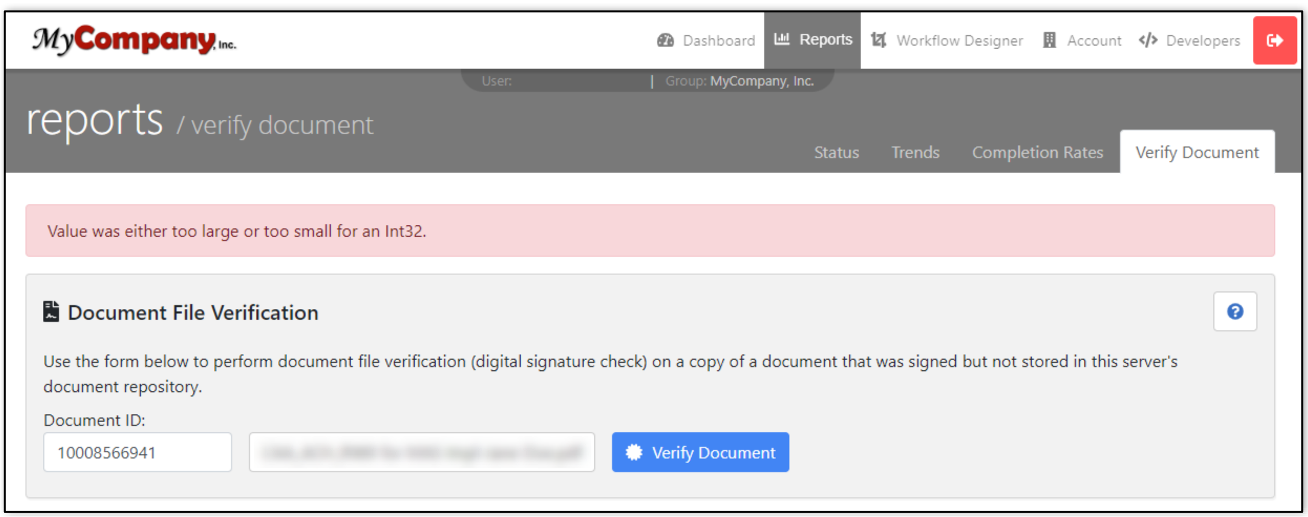


Release Notes

[PEP-6277] - Fixed issue where if the cancel behavior is set to prompt for the cancellation reason, after the participant selects to cancel a task, the participant is not prompted for the cancellation reason and moves to a suspended status. The participant should be prompted for the cancellation reason if the cancel behavior is set to do so. Please see the cancel behavior setting referenced in the image below.



[PEP-6242] - Fixed issue where if the Document ID entered for document verification had one extra digit an error and success message would display simultaneously on screen. The error message should be the only message that appears on screen. Please see the example image below.



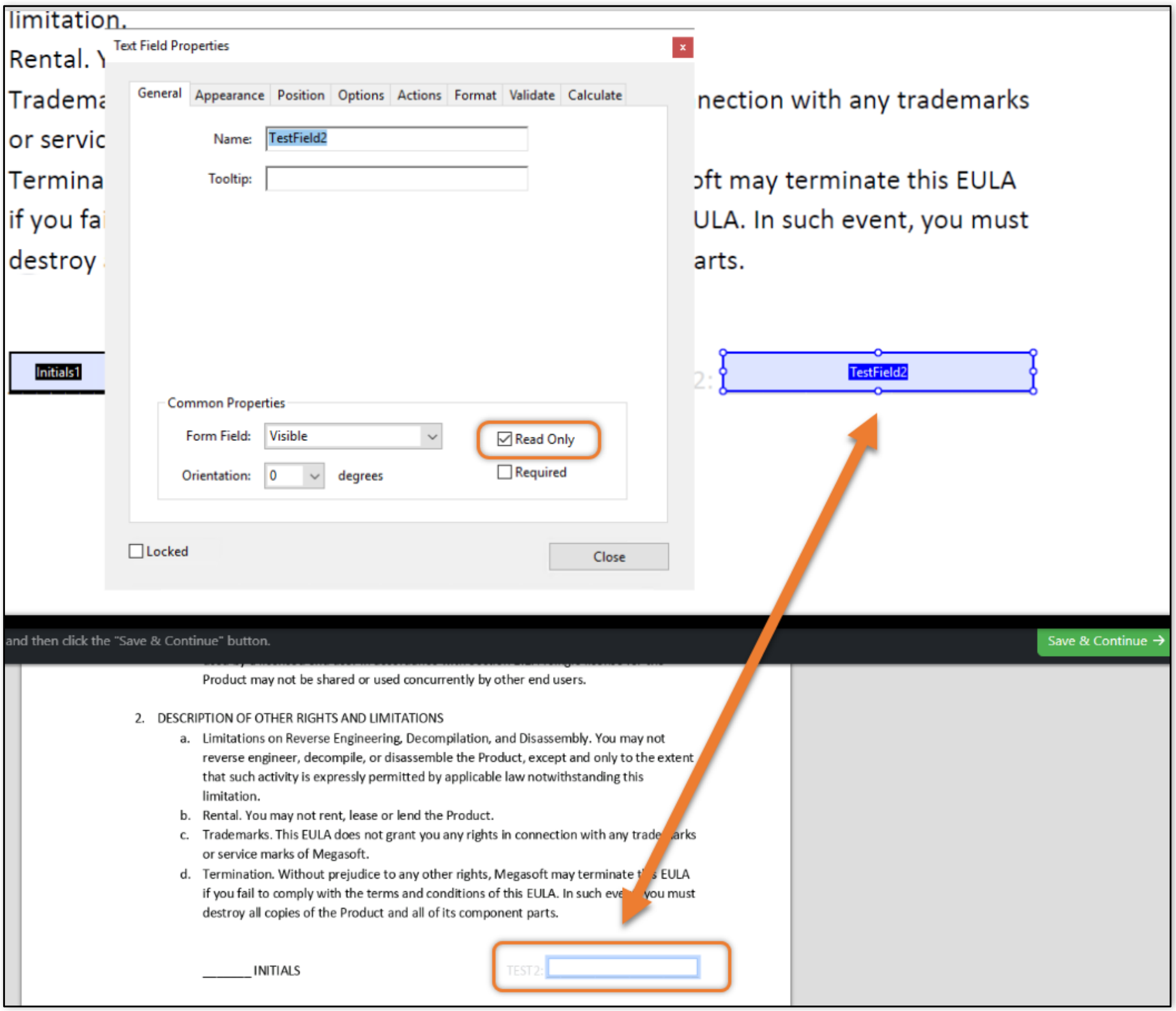
[PEP-6233] - Fixed issue where a Participant would see a blank screen with a logo after signing. The screen would go on to the correct next page, but the blank screen should not be seen. This was fixed by adding in a loading spinner and a prefetch on external exit screens to try and make the process more performant. Please see the example screen a Participant would see below.

Release Notes

[PEP-6215] - Fixed issue where signing sessions would not properly expire if you started another one.

[PEP-6156] - Fixed issue where outgoing email templates sometimes caused emails to be flagged as spam. Updated the email notifications to include proper HTML and a plain text alternative view in the sent emails.

[PEP-6093] - Fixed issue where when adding a PDF with a read-only DocForm field, the field would not be read-only and could be edited by the participant. Please see the example image below for more details.



v5.16.0.2 Release *Production Release Date: 2/24/2023*

Bug Fixes

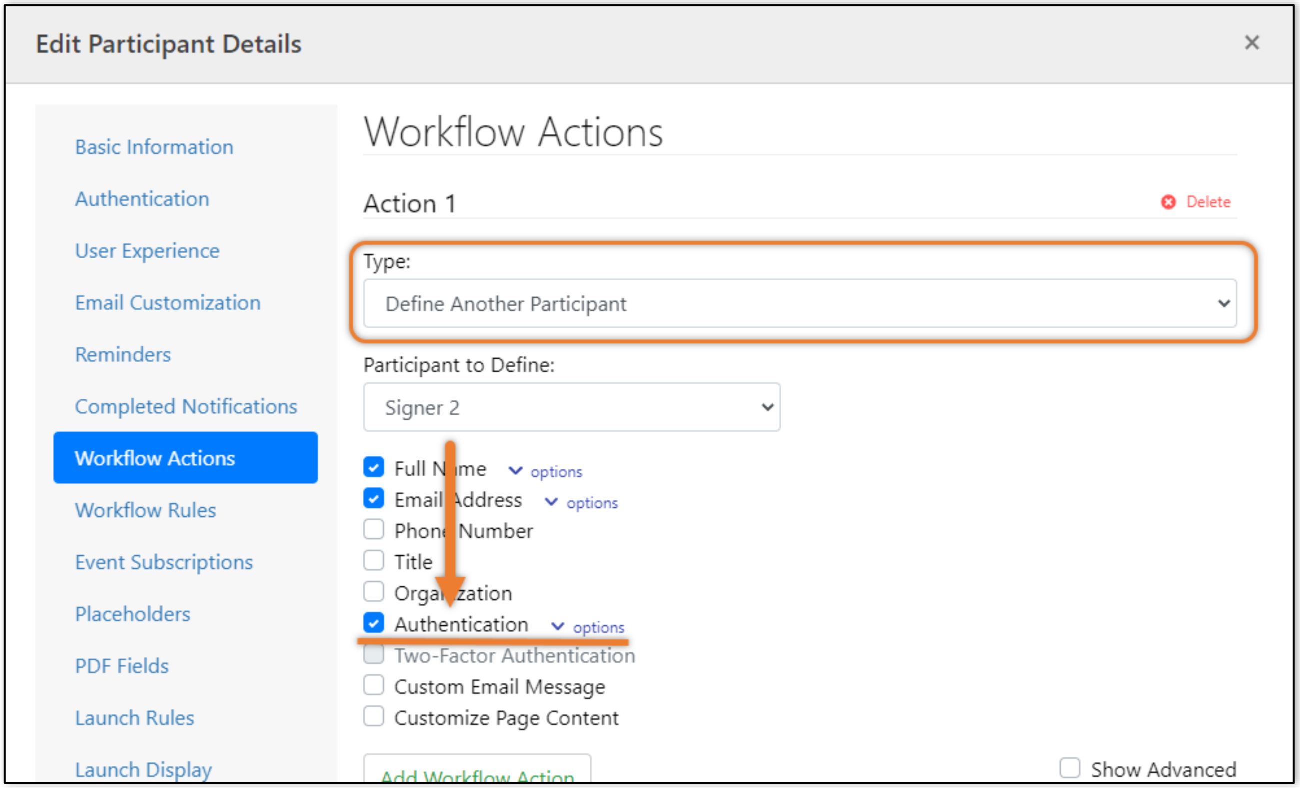
[PEP-6355] - Fixed issue where the incorrect Participant IP address was being recorded and logged on the Audit Report.

Release Notes

v5.16.0.1 Release *Production Release Date: 2/23/2023*

Bug Fixes

[PEP-6336] - Fixed issue where when a participant defines another participants' mobile authentication, it would not save the details correctly. Please see the setting referenced in the image below.



v5.16.0 Release *Production Release Date: 2/23/2023*

Important Notes:

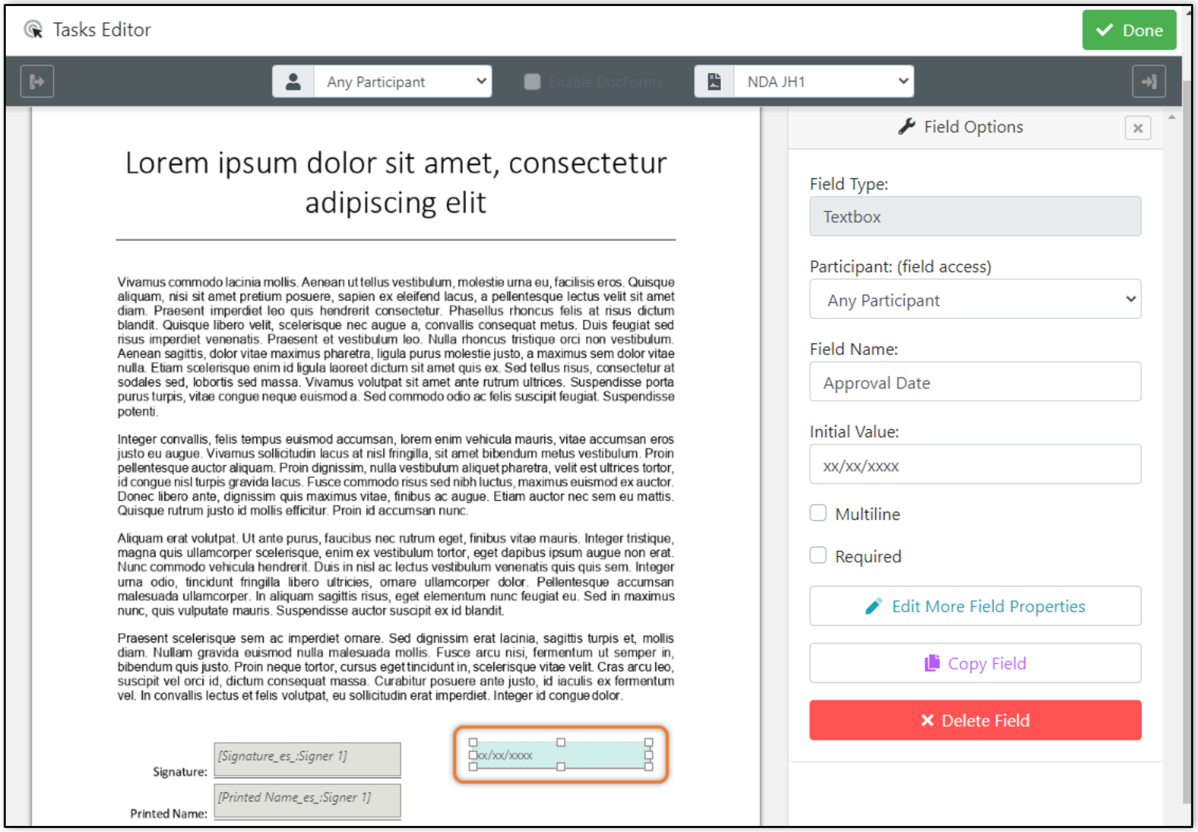
The following items are considered breaking changes.

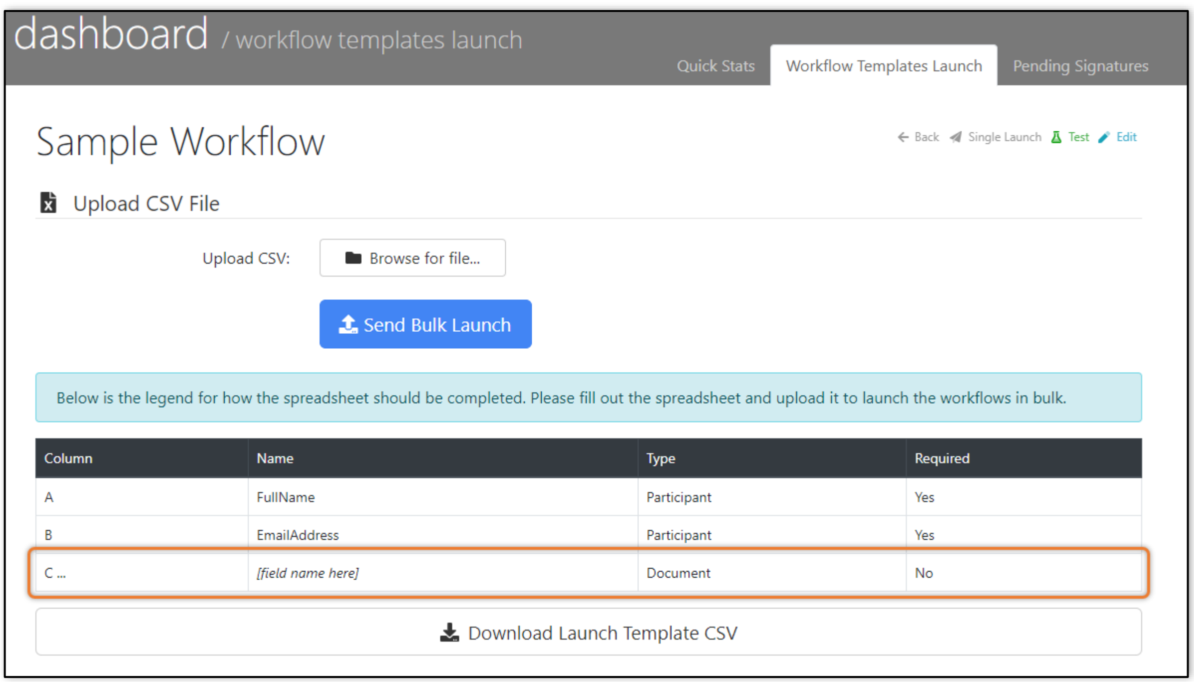
- [PEP-5350]-Twilio Authy was Removed as an integration option as it was deprecated by Twilio. If your team utilizes Twilio Authy for Mobile Authentication, it will no longer work and will need to be updated to Twilio SMS or Verify.

New Features

[PEP-5928] - Added the ability to submit document form fields via the Bulk Launch feature. An example form field and CSV legend can be seen in the images below for more details.

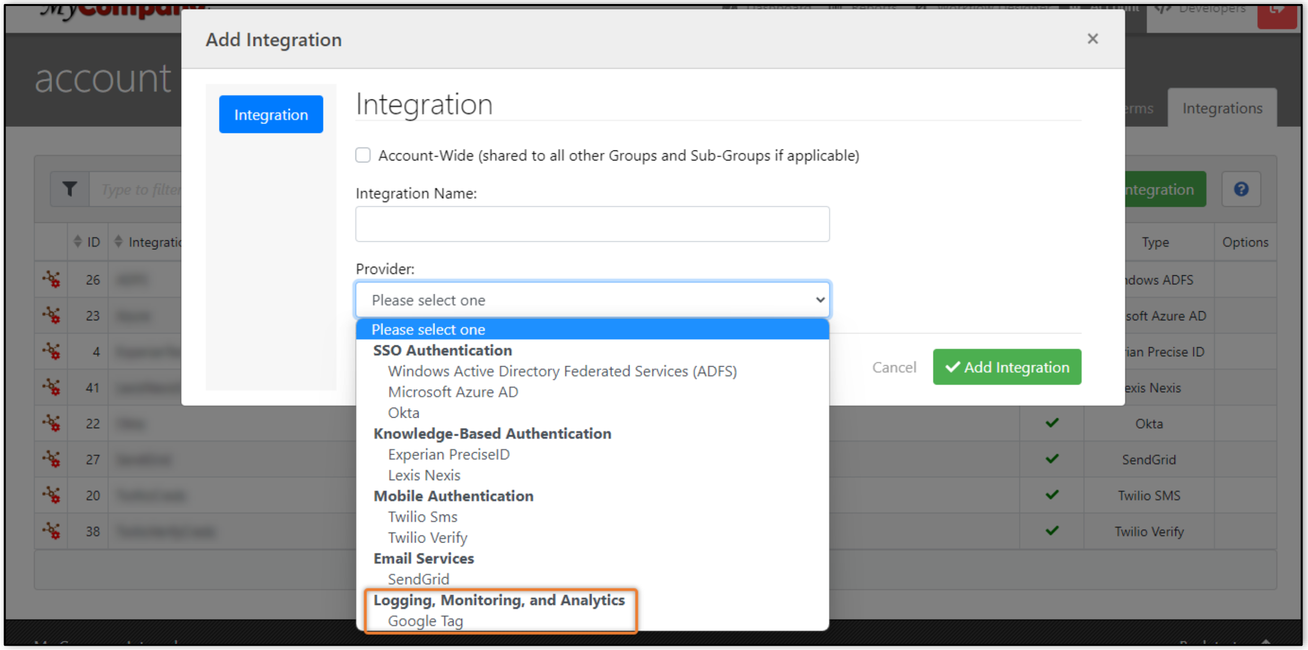
Release Notes



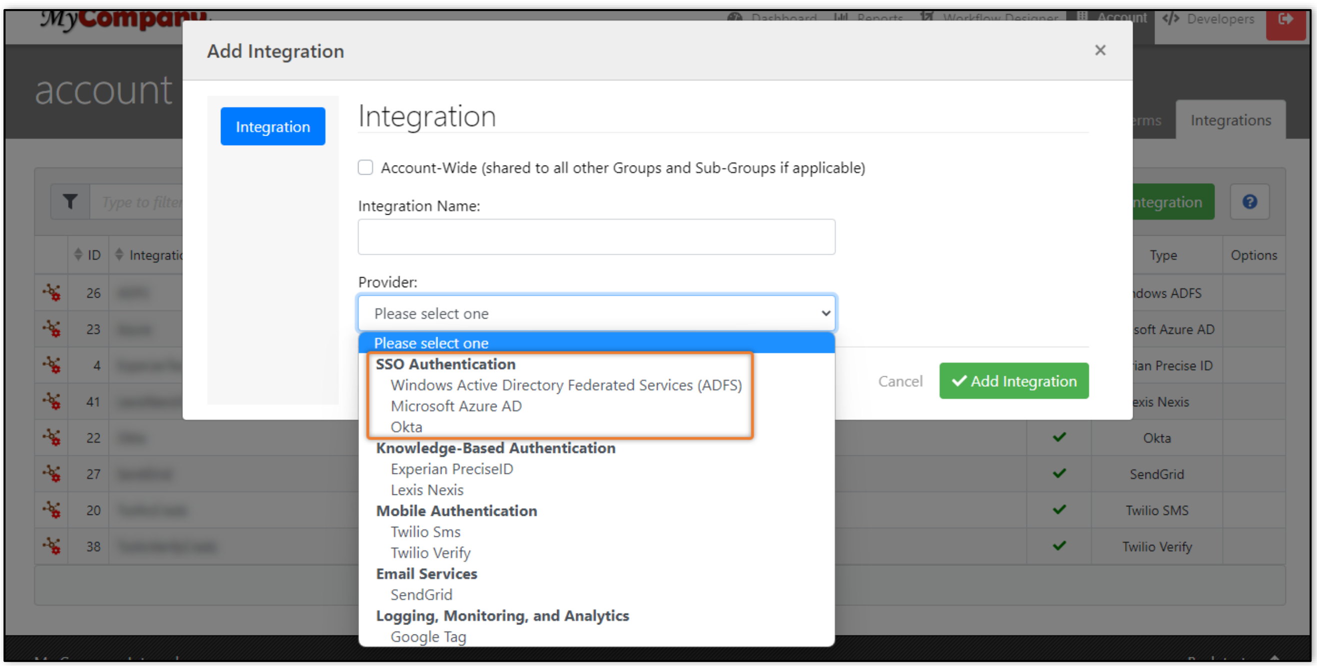


[PEP-5346] - Replaced the drop-in Analytics.htm functionality with official Google Tag Integration to support downstream Google Tag-enabled services (e.g. Google Analytics, etc.). Please see the image below for more details.

Release Notes



[PEP-5288] - Implemented ADFS, Azure, and Okta SSO for the new Signing UI. Please see the image below for more details.



[PEP-4977] - Created a new documentation website for developers to facilitate improved discovery and access to information. New Website: https://developers.alphatrust.com/. Note: Old website link will redirect to the new website.

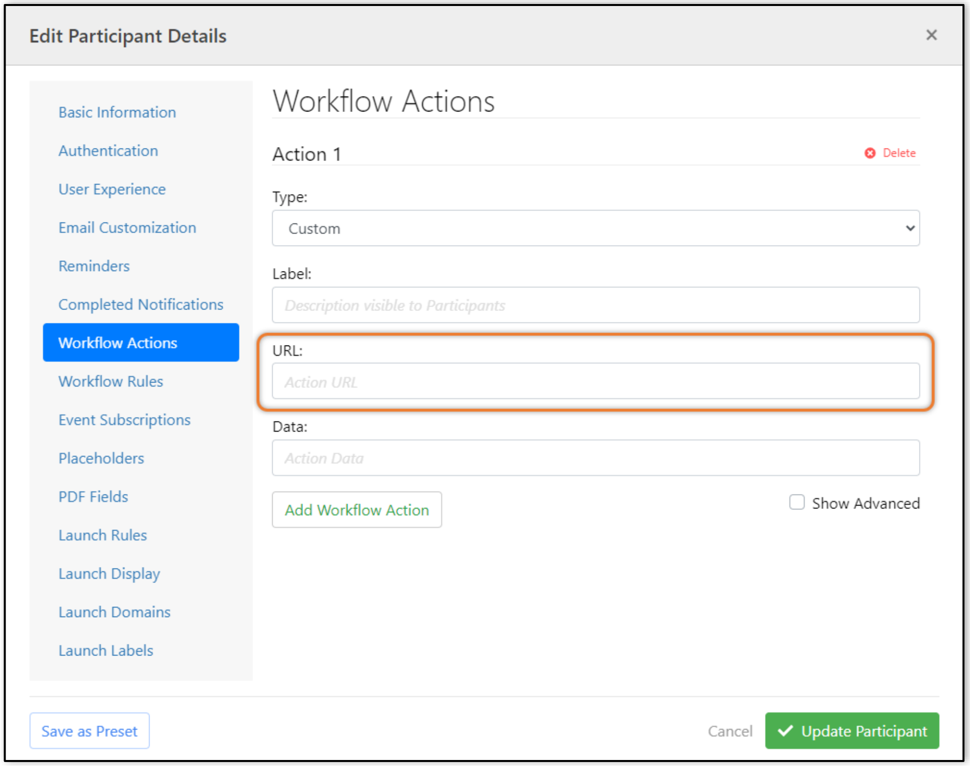
[PEP-4096] - Made improvements to the HTML Document Type Signing UI to be more consistent with the pdf Signing UI.

[PEP-3870] - Created a new modernized Signing UI to increase the overall performance of a user's signing experience. The upgraded components will also reduce the frequency of PDF validation errors as a result.

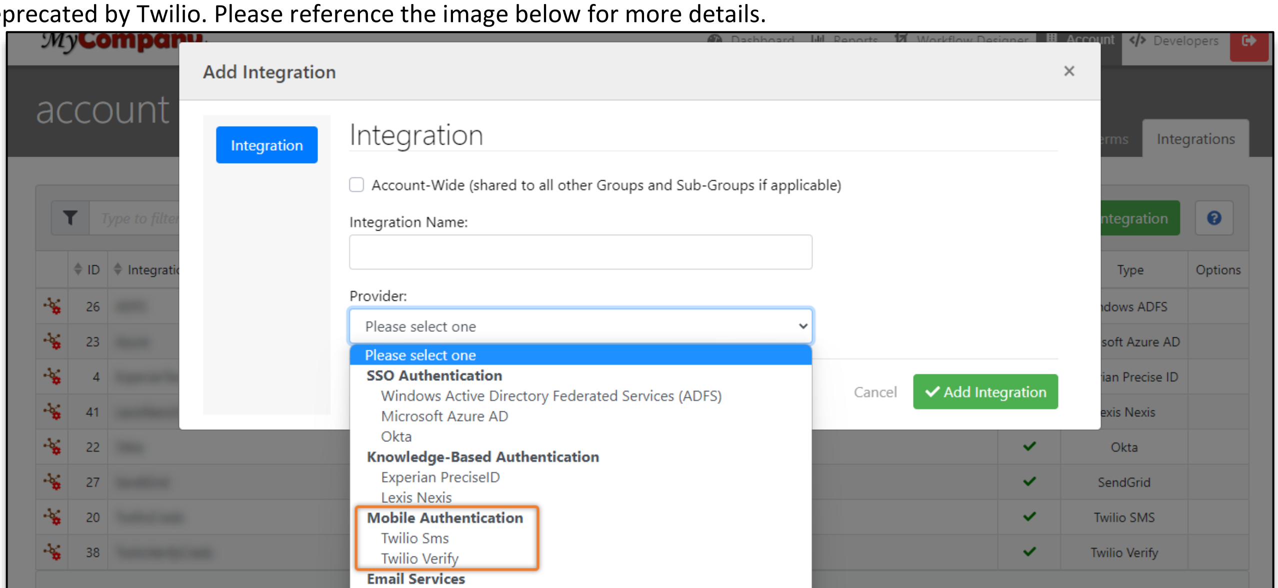
Improvements

[PEP-5779] - Changed the max characters for Workflow Action URLs from 512 to 2083. Please reference the image below for more details.

Release Notes

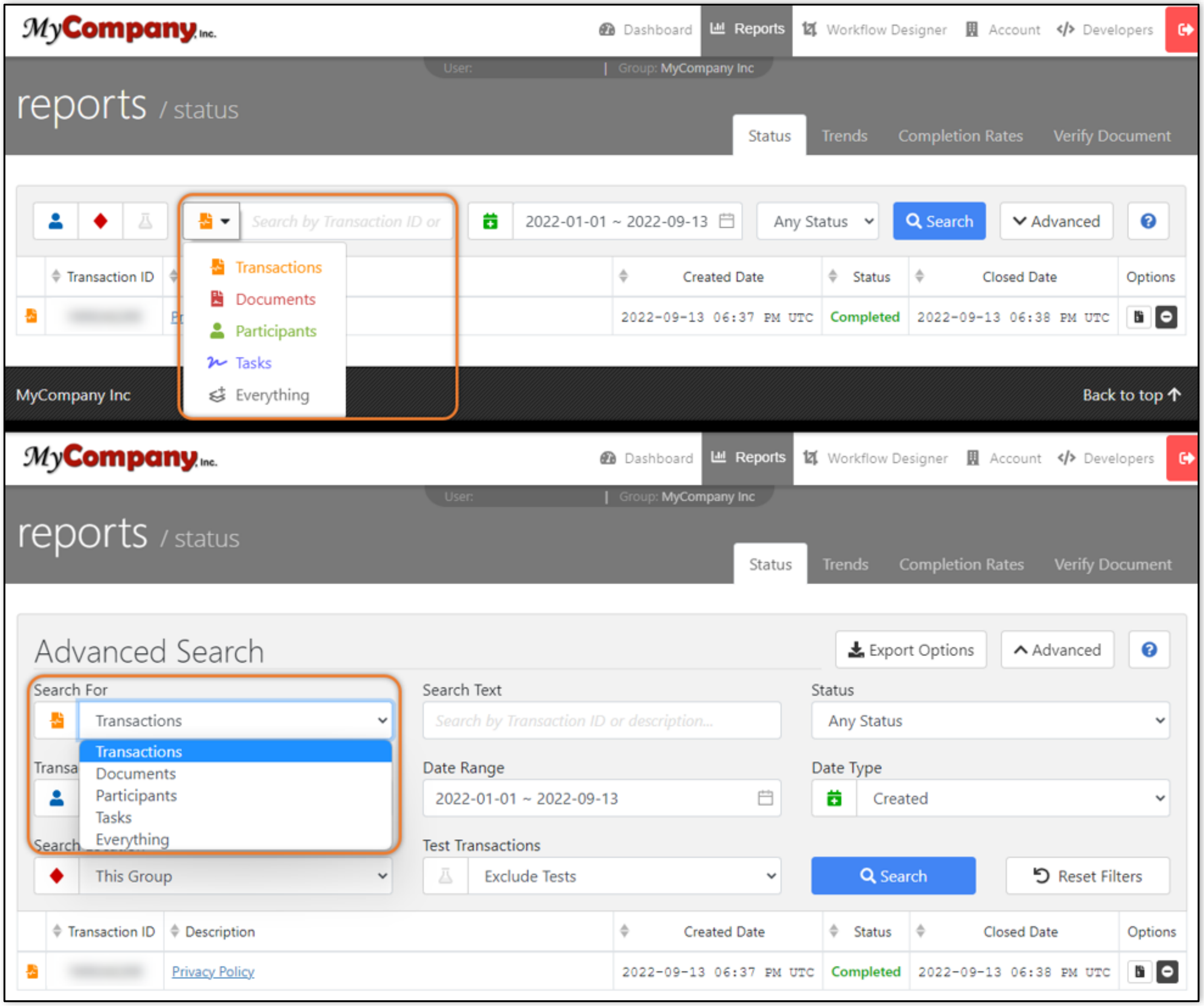


[PEP-5350] - Removed Twilio Authy as an integration option as it was a form of second-factor authentication that has been deprecated by Twilio. Please reference the image below for more details.



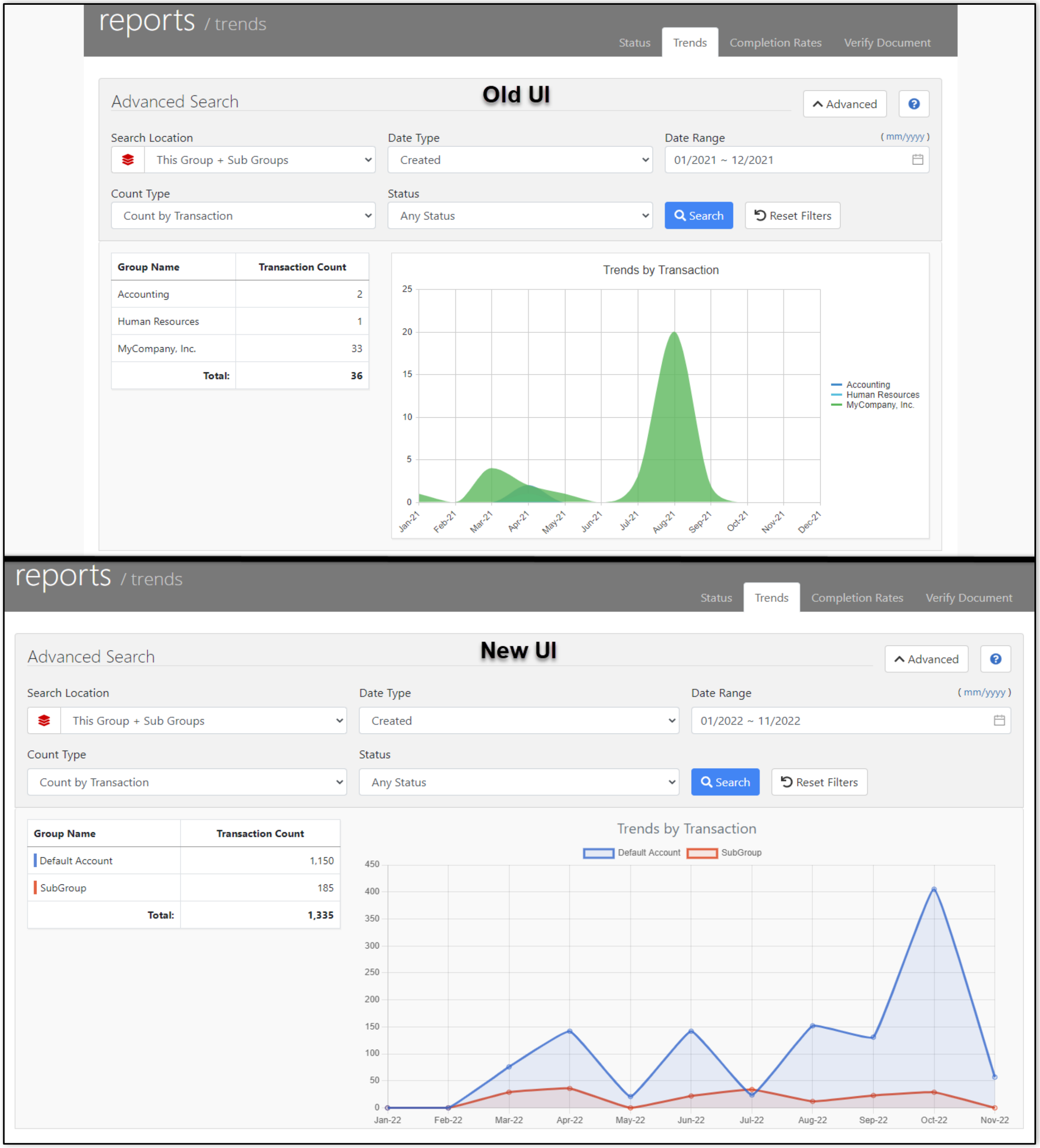
[PEP-5297] - Added additional Search Filter options (*Entity Type*) in the Status Reports. Please see the image below for an example of the search filter *Entity Type* referenced.

Release Notes

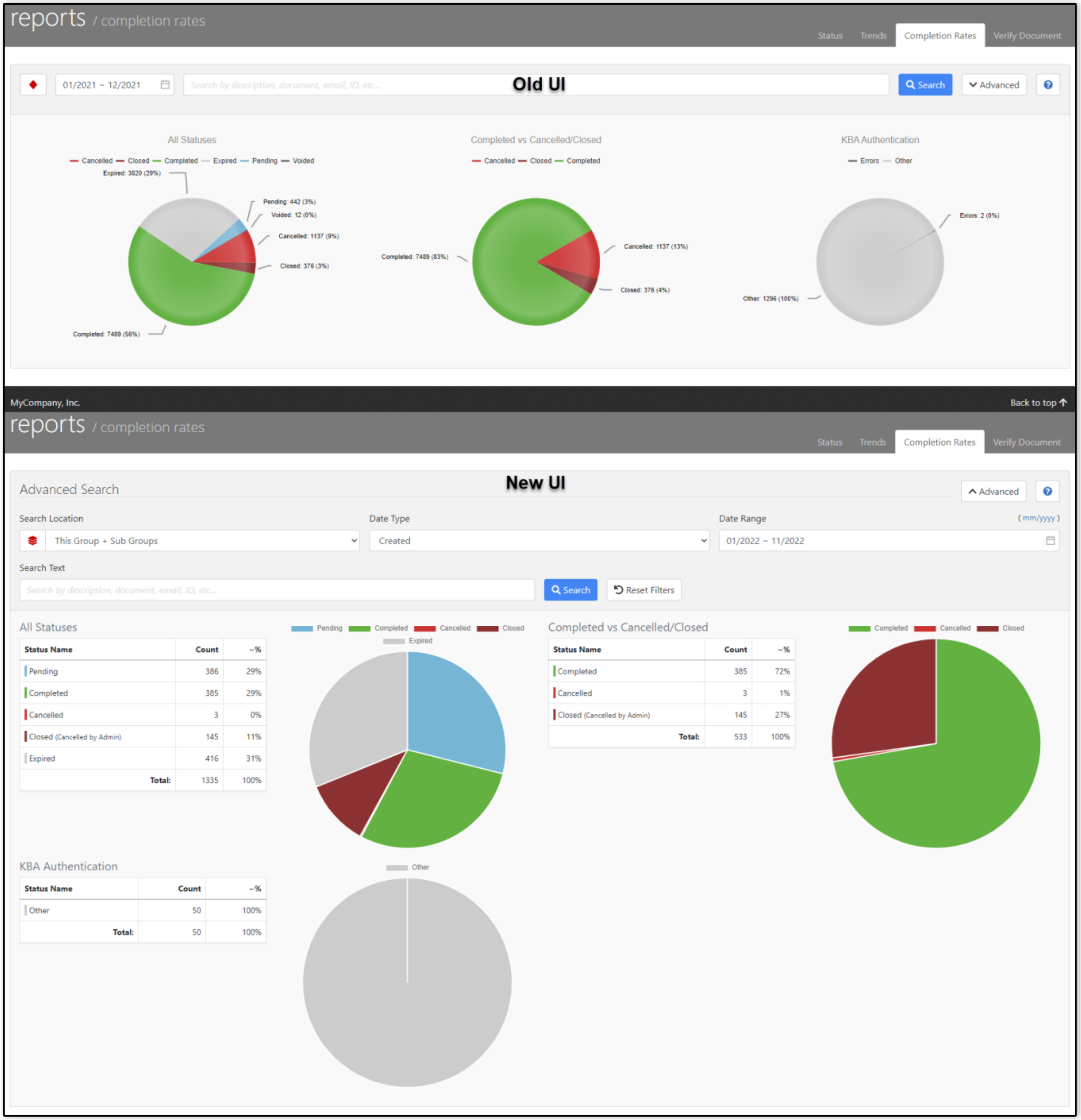


[PEP-5278] - Made minor UI/UX improvements on the Trends and Completion Rates Reports. Please reference the images below for more details.

Release Notes



Release Notes

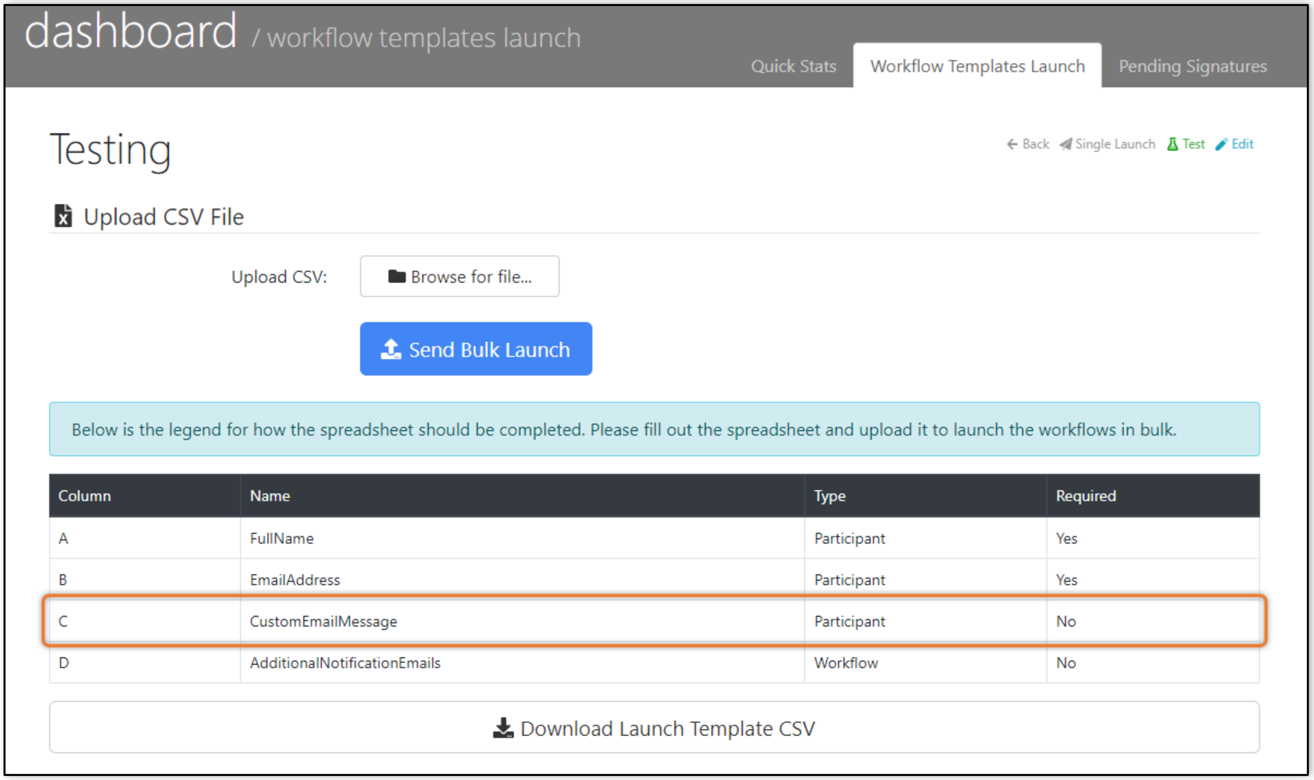


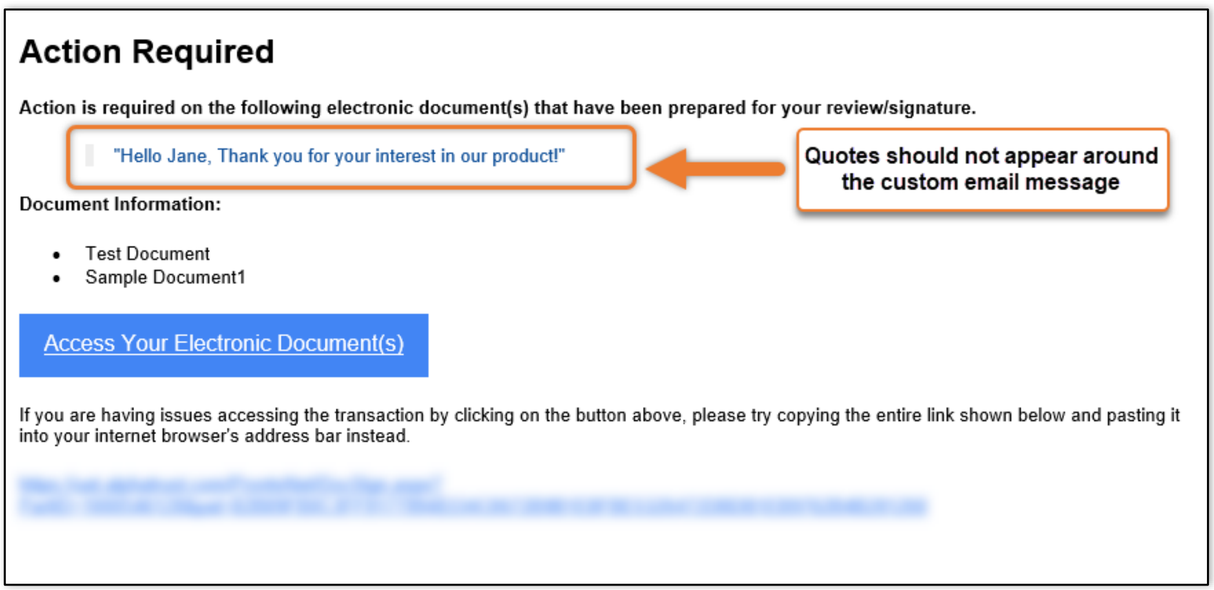
[PEP-4830] - Removed Authentication Requirement for RemoteSign() API. It now supports Password, Registered, and None. Please view the Signing Remotely developers article below for more information. https://developers.alphatrust.com/documentation/tasks/signing-remotely.html.

Bug Fixes

[PEP-6012] - Fixed issue where when using the Bulk Launch feature, an email string could incorrectly have double quotations around the custom email message content. An example image of the CSV legend and issue can be seen below.

Release Notes

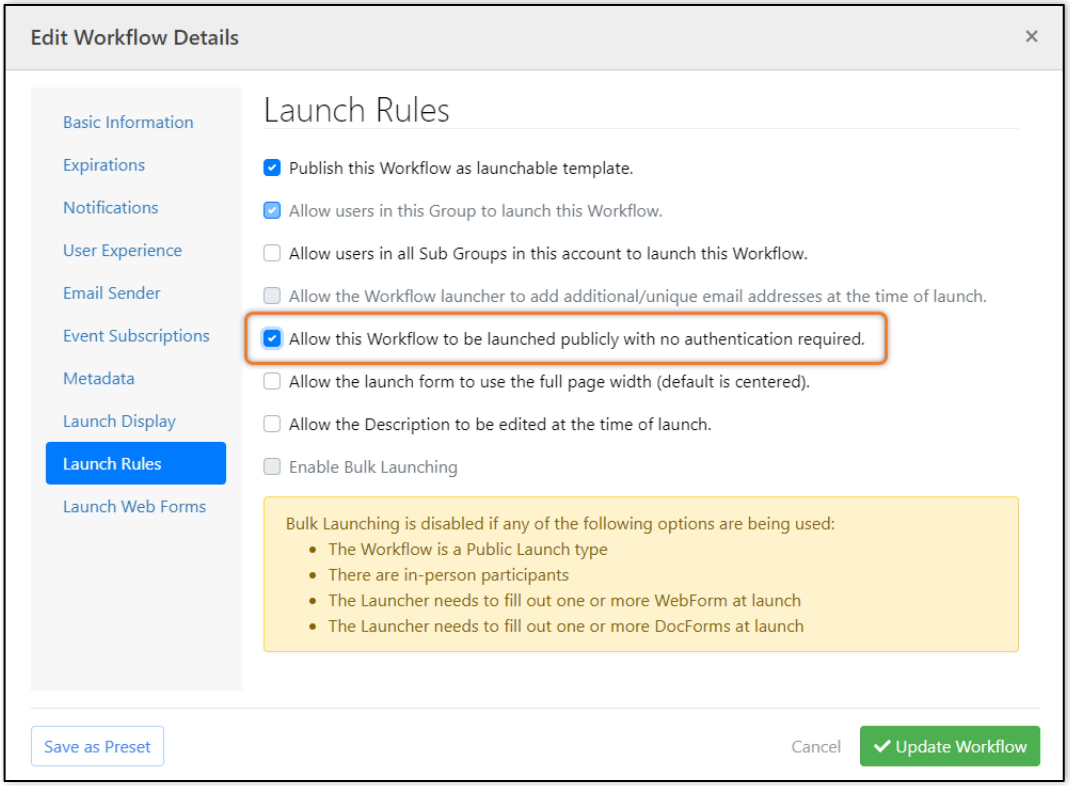


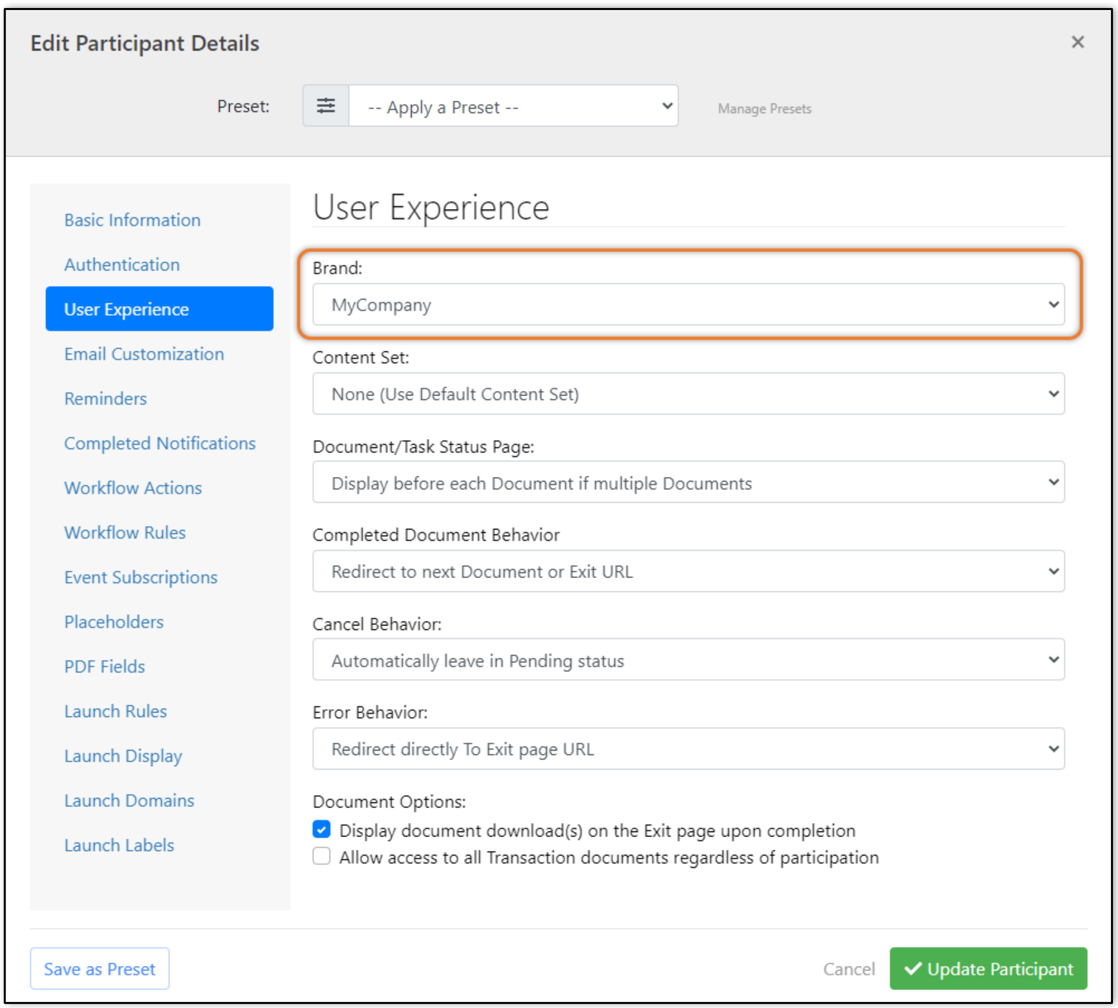


[PEP-6008] - Fixed issue where events were not being logged in the Event History for the new Signing UI. Increased logging for new Signing UI transactions.

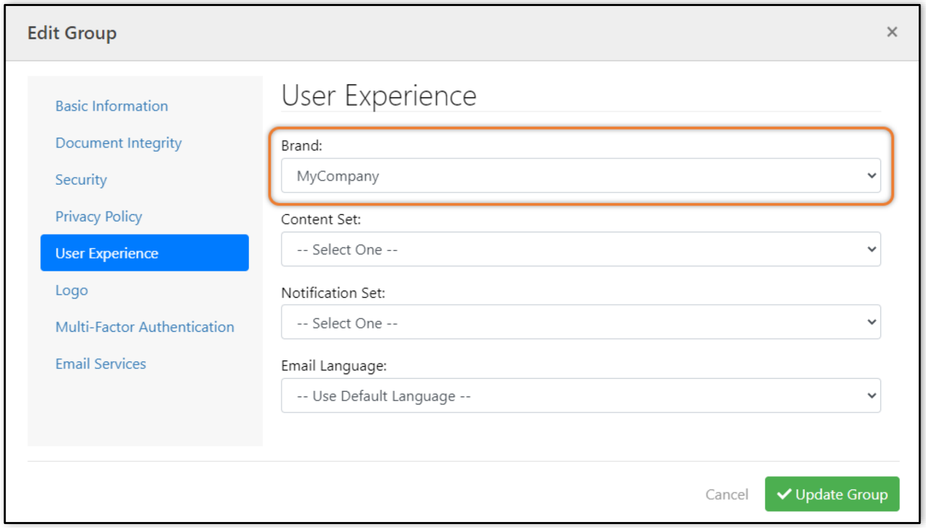
[PEP-5944] - Fixed issue where the public launch page would not pull in custom branding or content from either the workflow or the group settings. Please see the settings referenced in the images below.

Release Notes

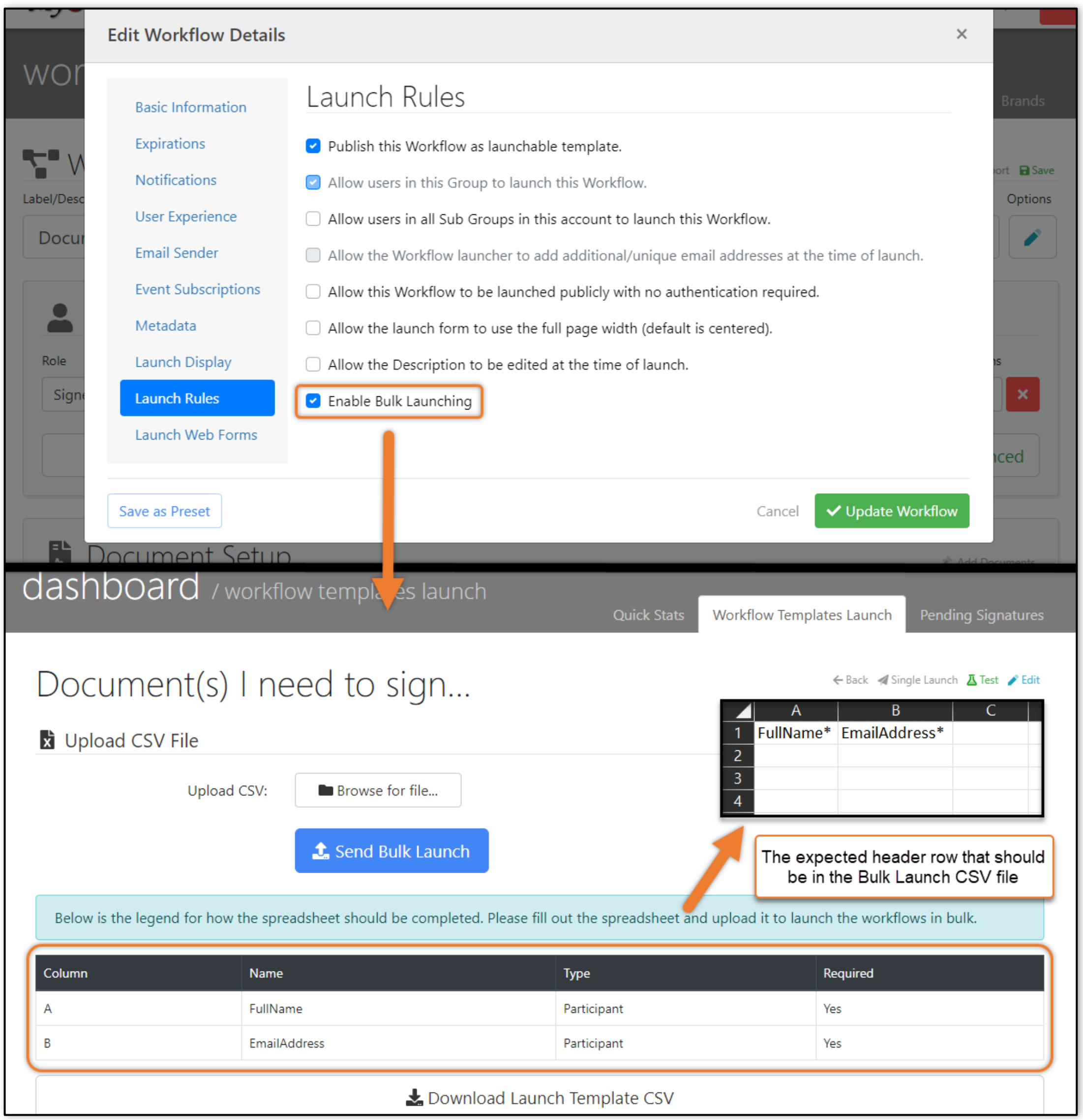




Release Notes

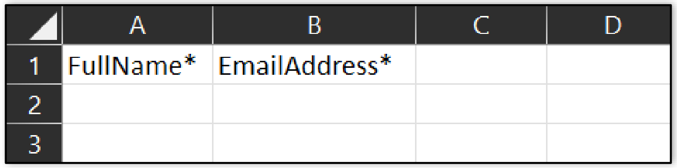


[PEP-5815] - Fixed issue where a user would see an internal error message after uploading a Bulk Launch CSV file. The error message would appear due to the CSV file not containing the expected header row. Added validation to the Bulk Launch CSV file to ensure the file uploaded is valid file with the expected header row. Please see the image below of the Workflow setting referenced and an example CSV file header row for more details.

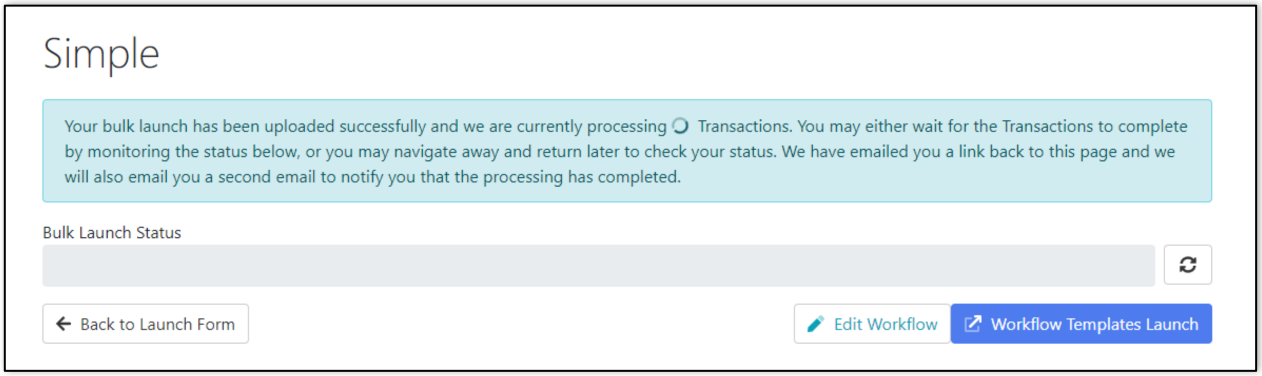


Release Notes

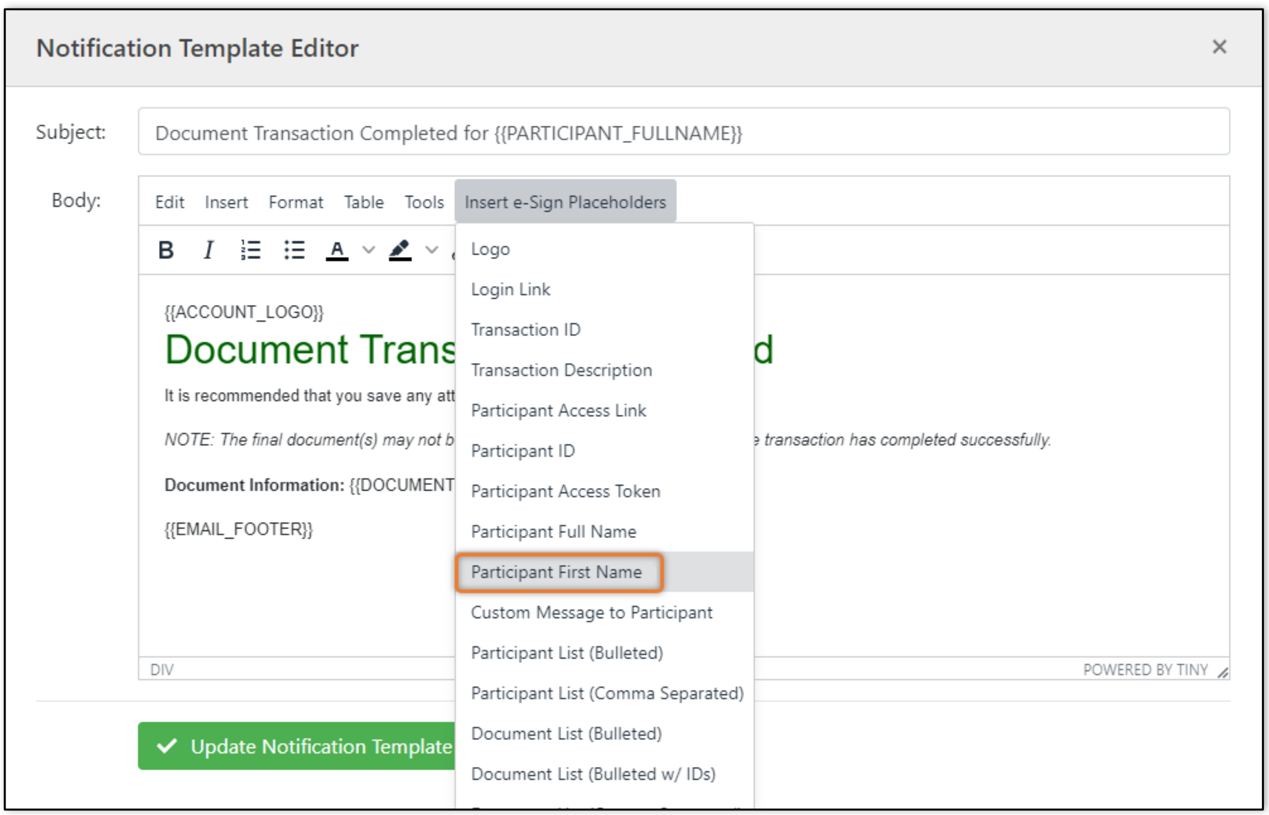
[PEP-5812] - Fixed issue where the Bulk Launch Status screen would hang and never update if a CSV file that only contained header row was used. Added CSV validation to ensure more than just a header row is in the CVS file used. Please see the images below of an example CSV with header row only and the Launch Status screen.



	A	B	C	D
1	FullName*	EmailAddress*		
2				
3				

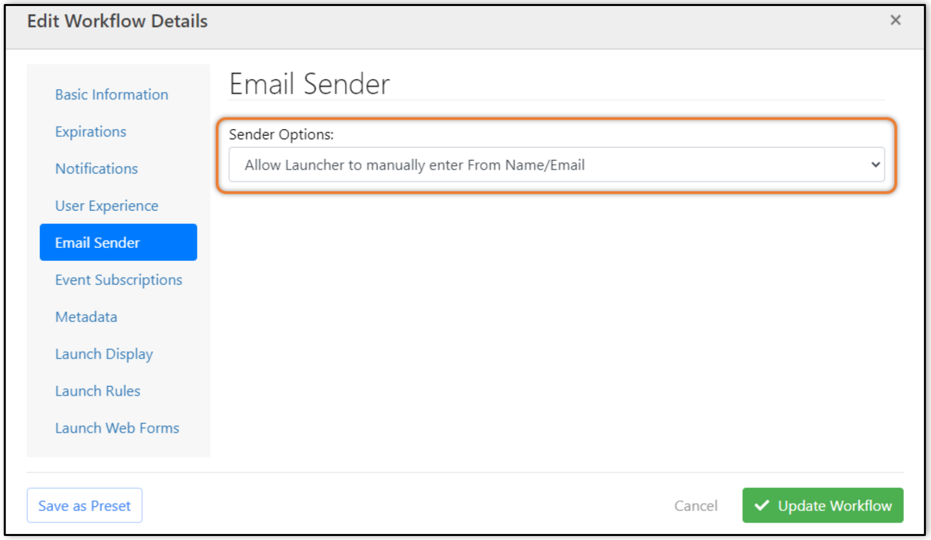


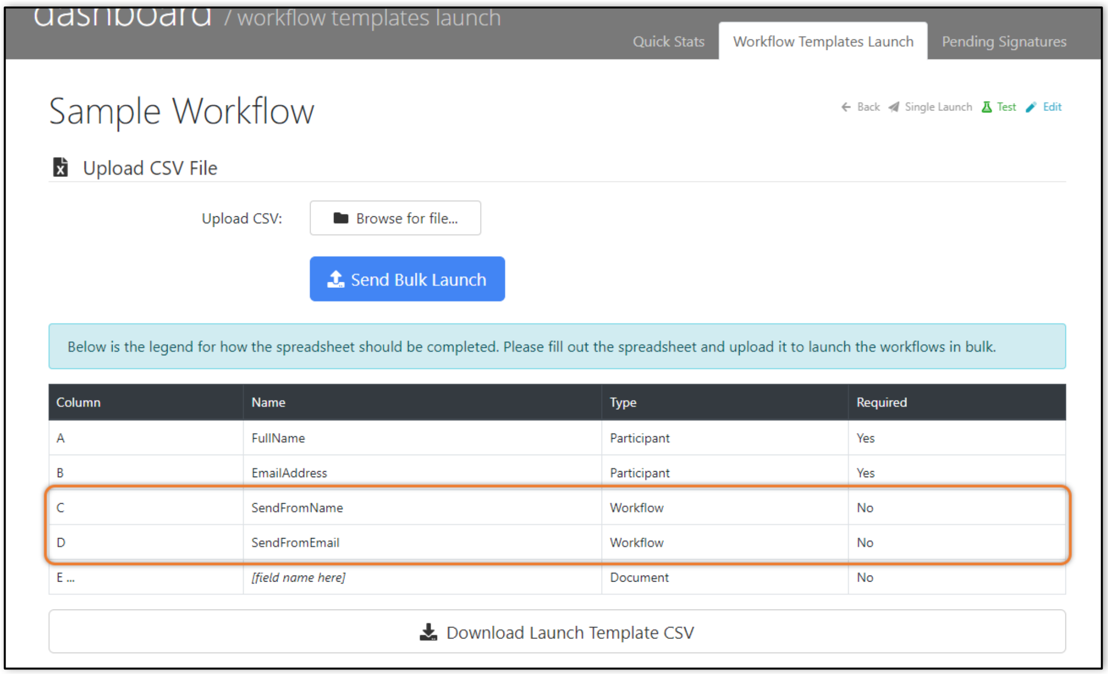
[PEP-5775] - Fixed a typo in the Notifications placeholders. Changed “Participant First Namee“ to “Participant First Name“. Please reference the image below for more details.



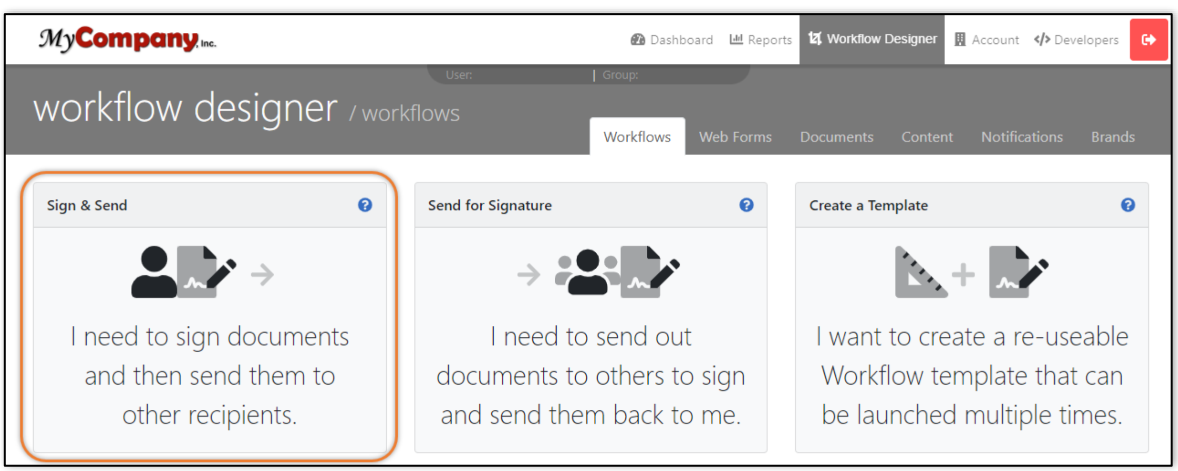
[PEP-5670] - Fixed issue where when using the Bulk Launch feature, the custom SendFromName and SendFromEmail would not be recognized and the system default SendFromName and SendFromEmail would be used. Please see the images below for an example of a SendFromName and SendFromEmail with Bulk Launch and the Workflow setting.

Release Notes

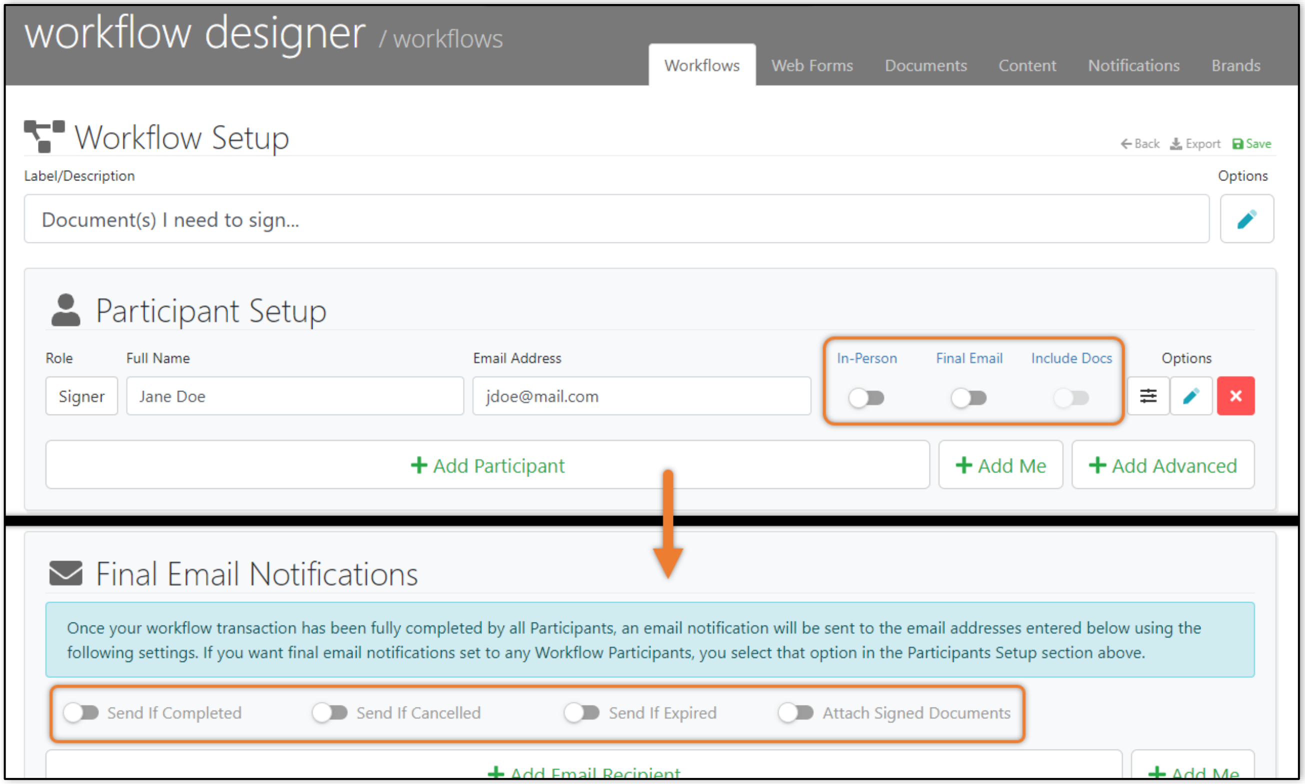




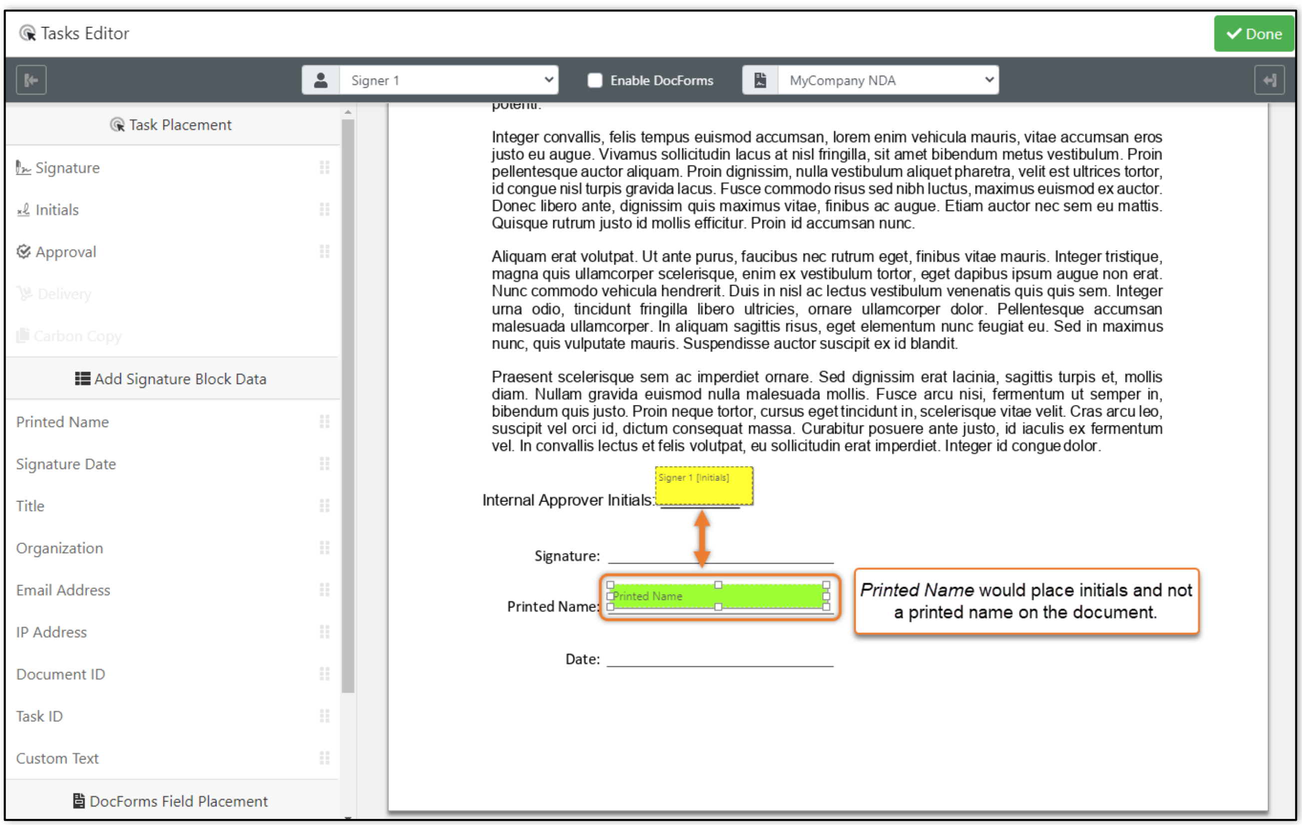
[PEP-5540] - Fixed issue where the Participant Setup and Final Email Notification toggle options such as *In-Person*, *Final Email*, and *Send If Completed* would not update correctly when sending a Sign & Send workflow. Please see the images below referencing to the affected Workflow type and toggles settings.



Release Notes



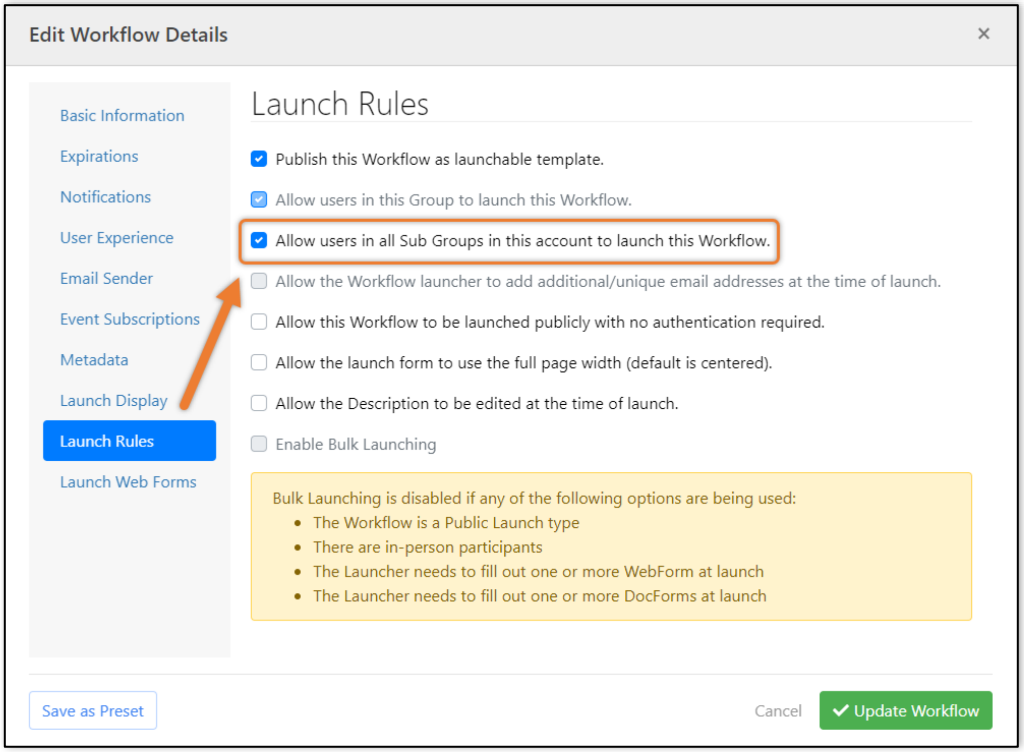
[PEP-5535] - Fixed issue where the *Printed Name* Block Data, relating to an *Initials* task, would appear as initials on the document when it should appear as a printed name. Please see the image below for more details.

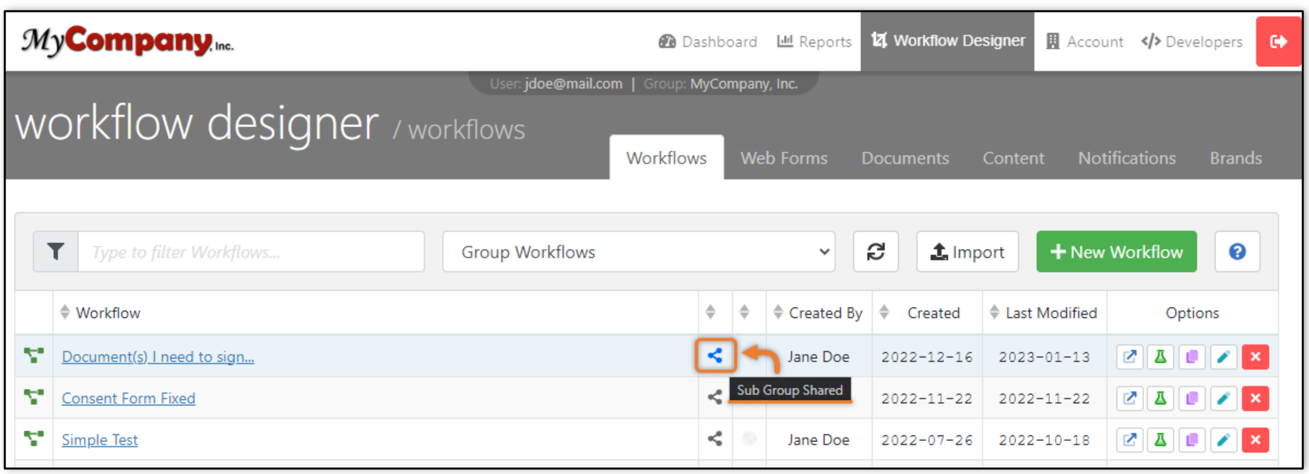


[PEP-5488] - Fixed issue where another user could take ownership of a Web Form and move it to a Sub-Group by editing and saving the Web Form.

Release Notes

[PEP-5486] - Fixed issue where when calling GetWorkflowLaunchRules() the Sub Group API credentials could not find any shared Workflows when they belonged to the Parent Group. The call should have returned information on shared Workflows that were owned by the Parent Group or Sub Group. Please see the Workflow settings referenced in the images below.

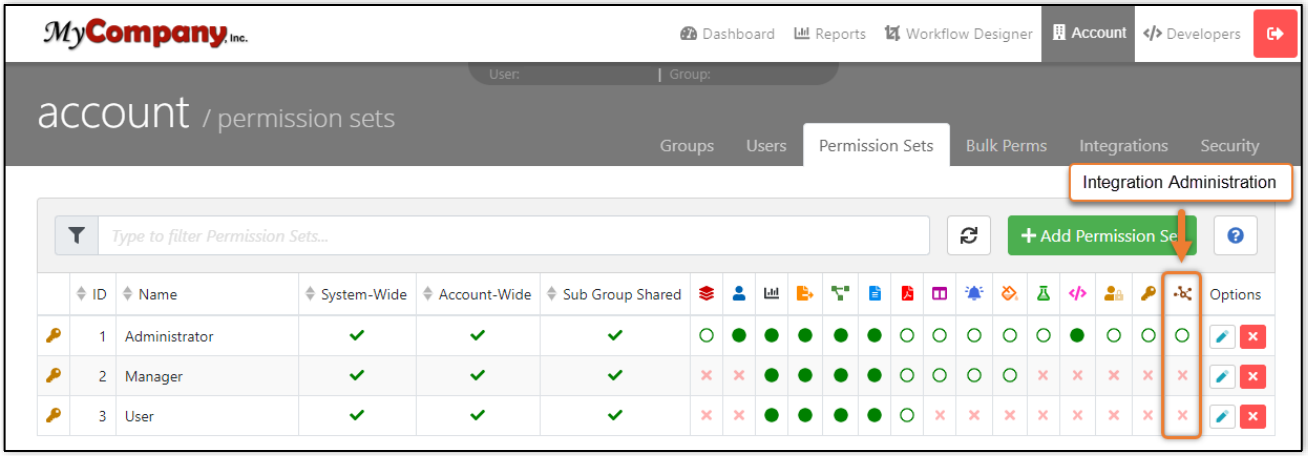


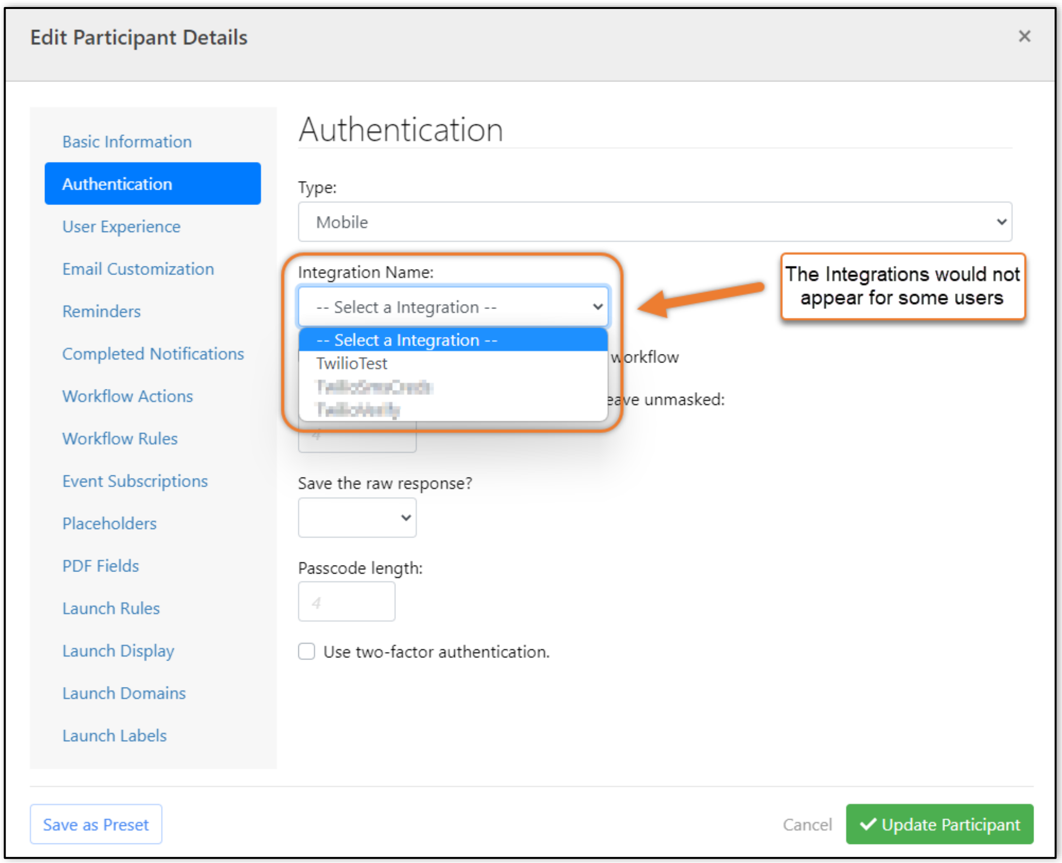


[PEP-5483] - Fixed issue where when calling GetWorkflowLaunchRules() for a Workflow that does not exist, the API permission check would return the incorrect response. If no Workflow exists, the API call should return *false* with a message stating that the Workflow either doesn't exist or you don't have the correct permissions to access it.

[PEP-5442] - Fixed issue where when selecting Mobile Authentication integration for a participant the *Integration Name* dropdown would not populate with selectable integrations. This issue would specifically affect users that did not have permission to *Integration Administration*. Please see the image below for the referenced permission and more details.

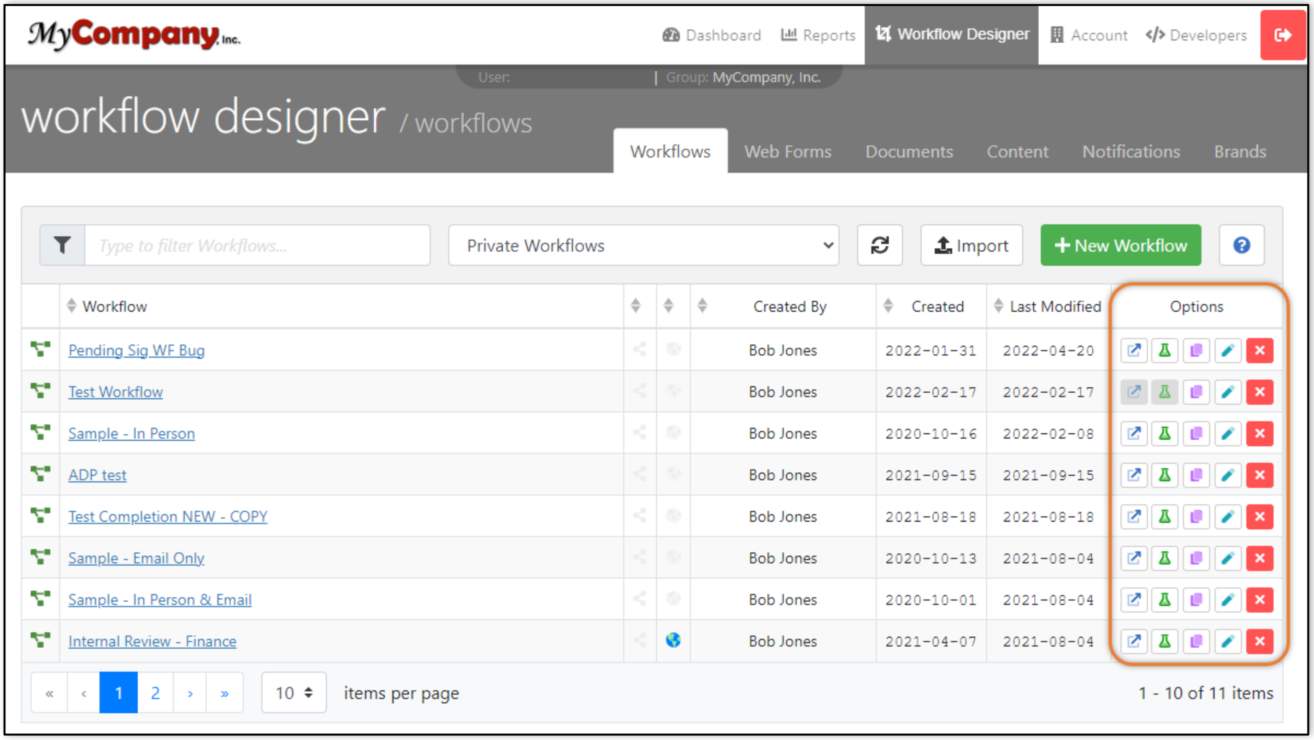
Release Notes



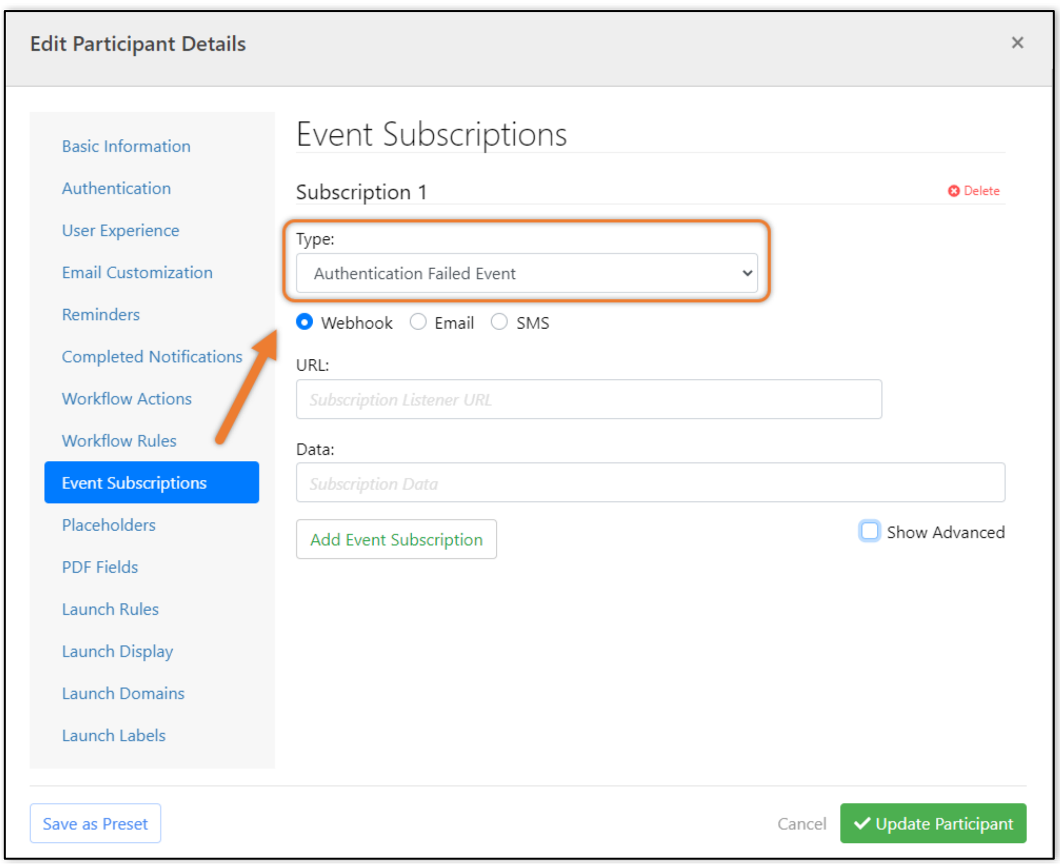


[PEP-5440] - Fixed issue where some of the options buttons would not appear on the Workflows page for certain Workflows. This issue affected Workflows where the Created By user was deleted. All options will now render on the page but will be disabled if the current user is not allowed to click/use them. Please reference the image below for more details.

Release Notes

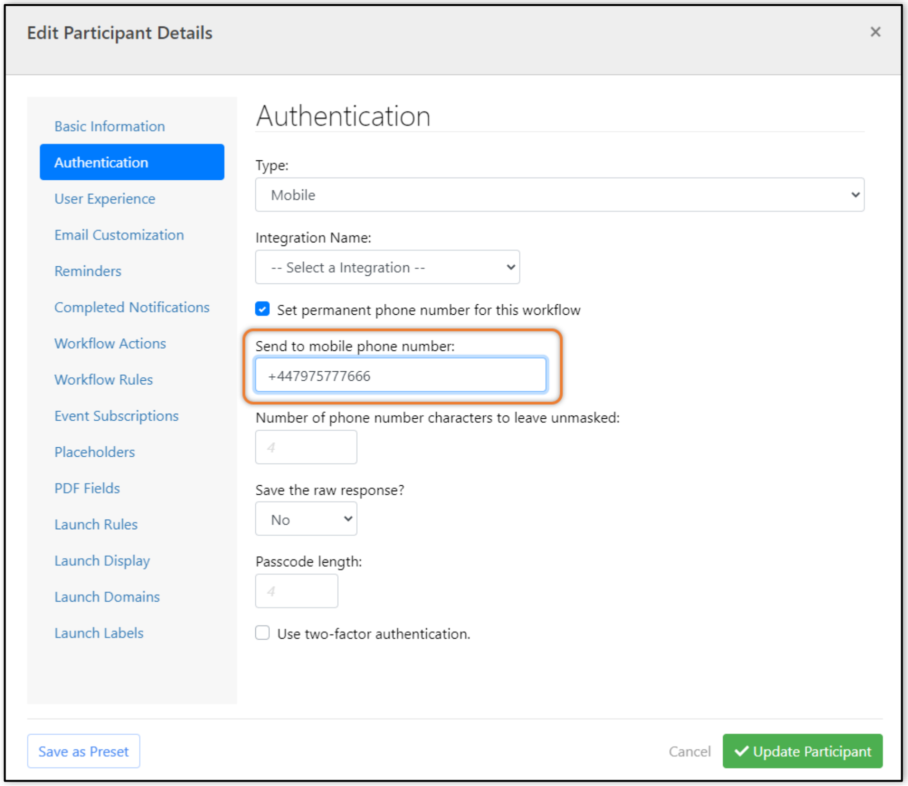


[PEP-5421] - Fixed issue where after reassigning a task to a new participant the Event Subscription for an Authentication Failed Event would not carry over to the reassigned participant. Please see the referenced setting in the image below.

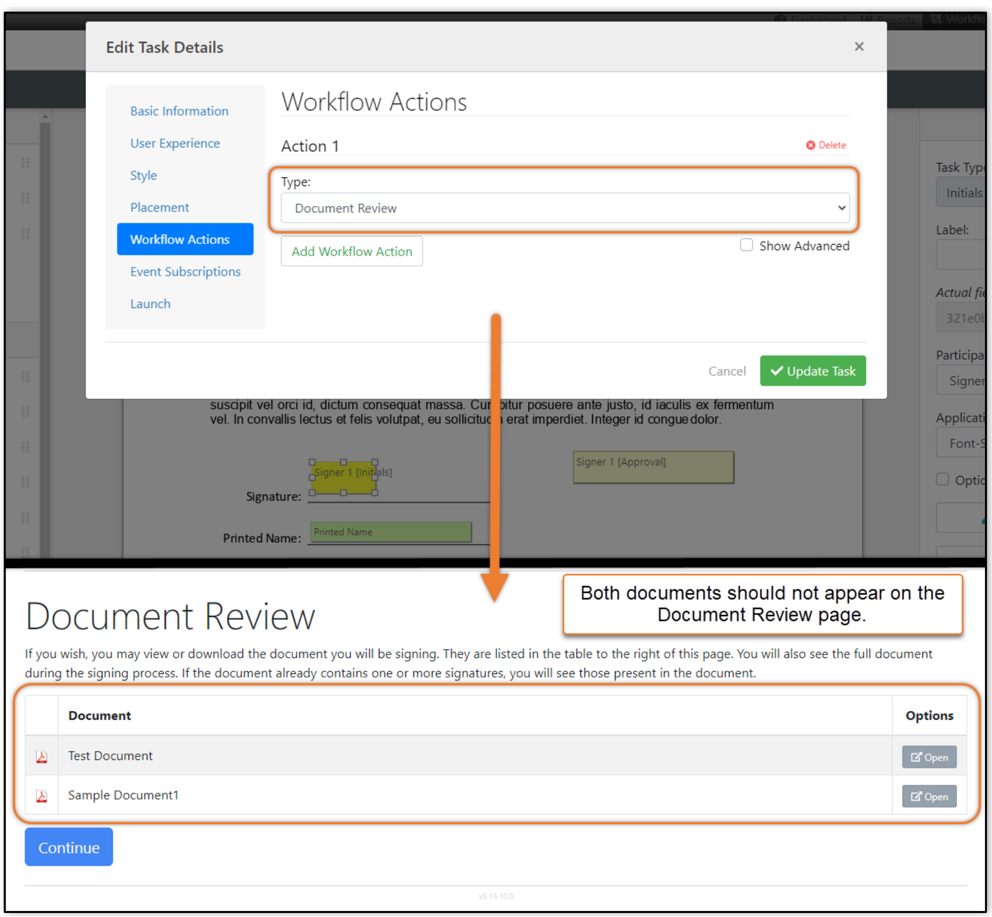


[PEP-5240] - Fixed issue where phone number validation would not allow for + country codes. Please see the example phone number with a country code below for more details.

Release Notes

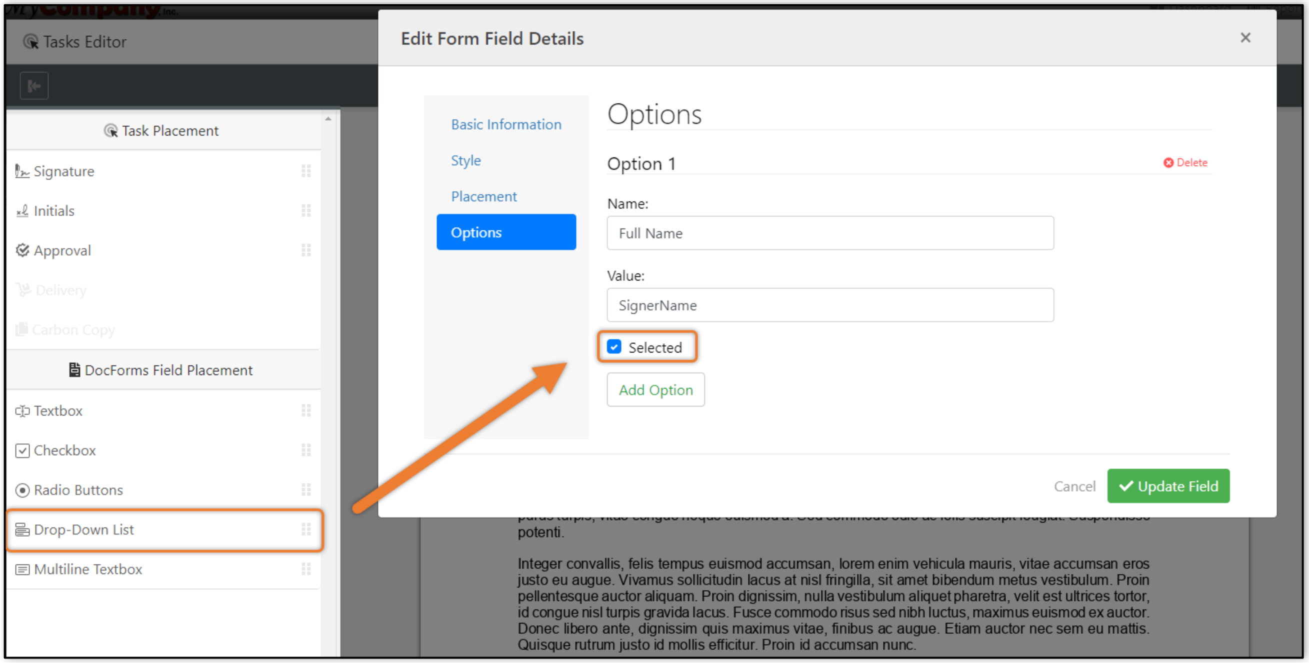


[PEP-4984] - Fixed issue where the Document Review workflow action on a task would show all documents in the participants workflow instead of only the document that the task was in. Please reference the example setting and image below for more details.

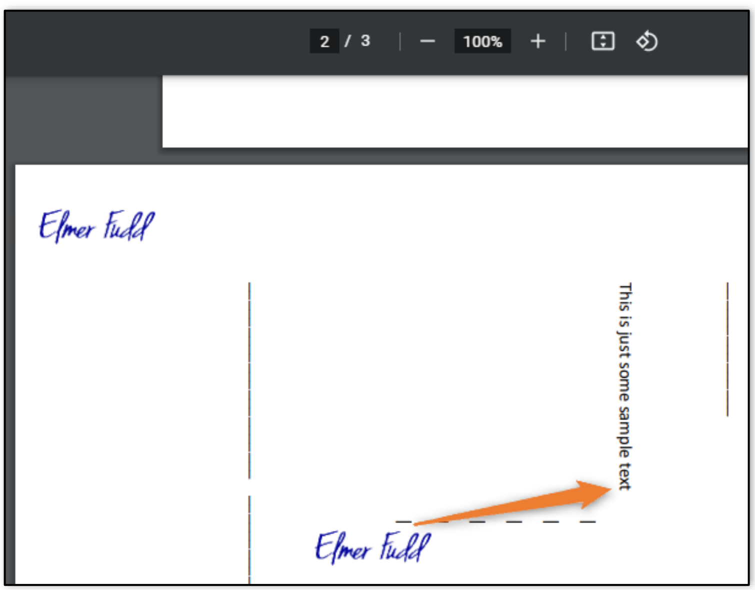


Release Notes

[PEP-4322] - Fixed issue where a user would be unable to un-check a DocForms dropdown option while in the task editor. Please see the image below for more details.



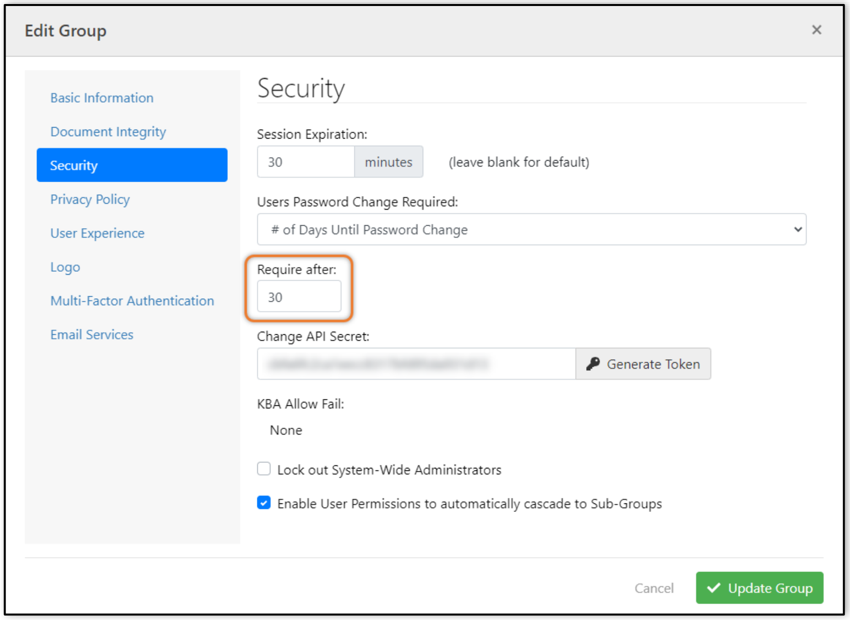
[PEP-3438] - Fixed issue where when a page in a PDF document is rotated 90 or 180 degrees, the calculation for the signature placement is off when its position is near search text. Please see the example signature image below.



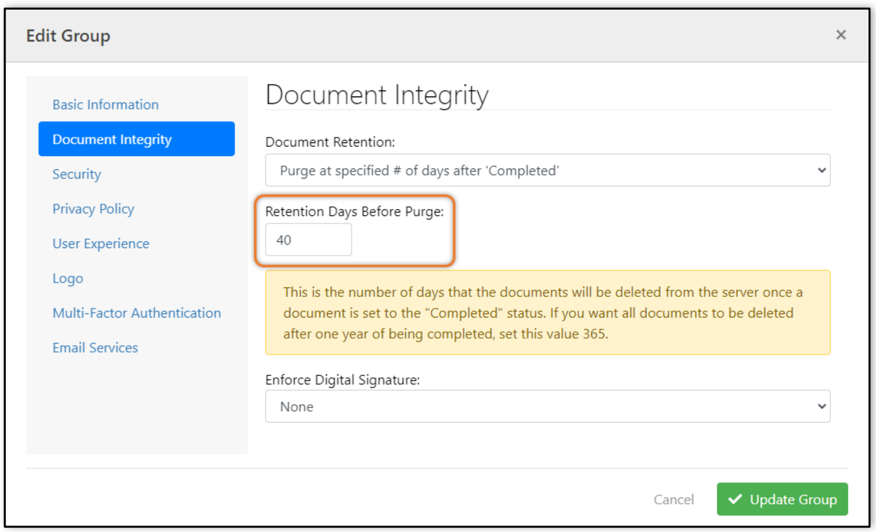
[PEP-2979] - Fixed issue where the RemoteSign() API call would fail validation if the participant name wasn't set on creation. Please view the Signing Remotely developers article below for more information. https://developers.alphatrust.com/documentation/tasks/signing-remotely.html.

[PEP-2555] - Fixed issue where the *User Password Change* setting could be set to a negative number. Please see the image below for an example of the setting referenced.

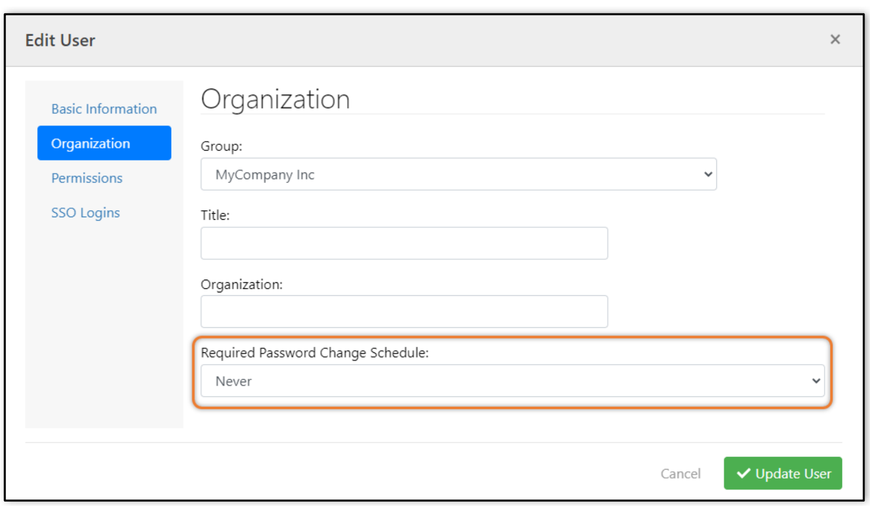
Release Notes



[PEP-2554] - Fixed issue where the *Document Retention* setting could be set to a negative number. Please see the image below for an example of the setting referenced.



[PEP-1643] - Fixed issue where the password change field was no longer a number field when set to never. Please see the image below for an example of the setting referenced.

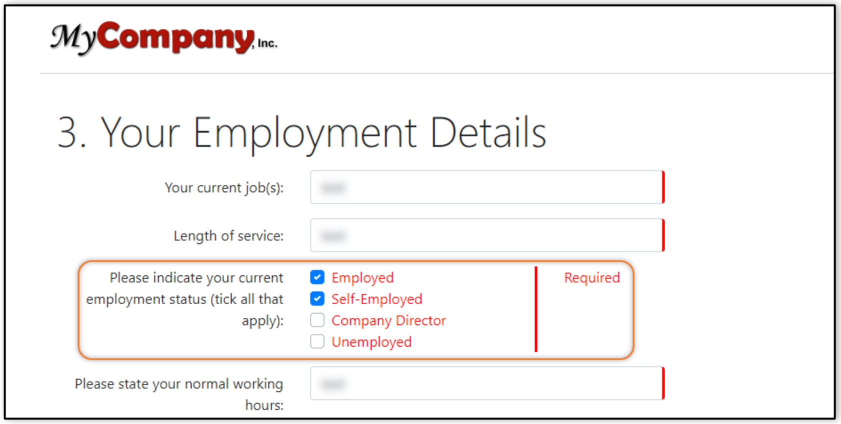


Release Notes

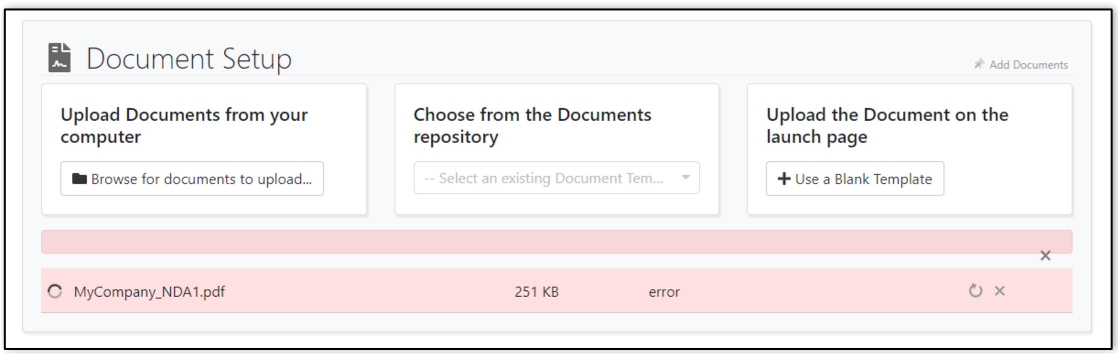
v5.15.10 Release — *Production Release Date: 11/17/2022*

Bug Fixes

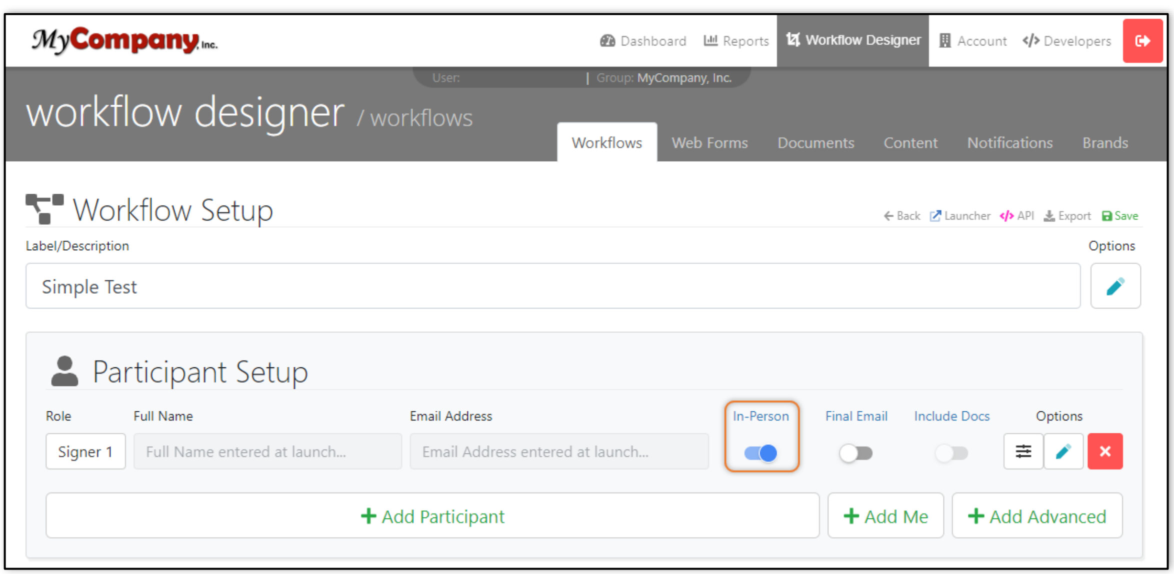
[PEP-5715] - Fixed issue where participants would see a required validation error for pre-selected checkboxes when prepopulating checkboxes from a PDF. Participants would need to deselect and reselect the checked box in order to bypass the validation error. Please reference the image below of an example of the error seen with checkboxes.



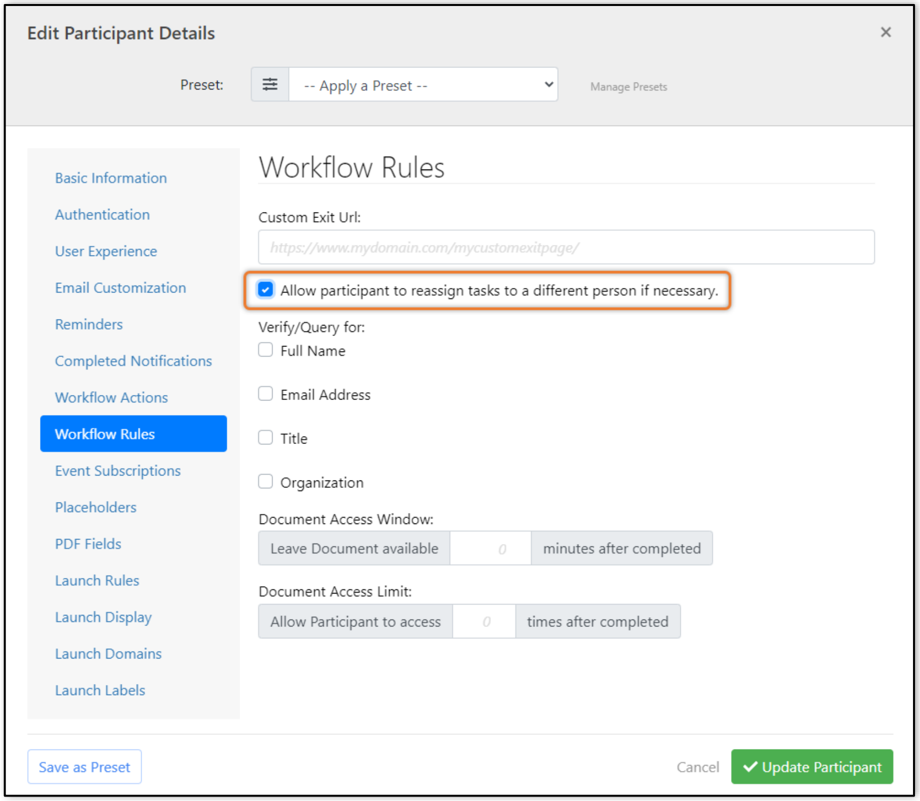
[PEP-5662] - Fixed issue where users may be unable to upload documents if they left the Workflow Setup screen open for too long. Reference the image below for an example of the error message seen.



[PEP-5420] - Fixed issue where a reassigned participant would not receive an email notification if the initial participant's signing method was In-Person. Please see the images below for an example of the Workflow settings referenced.



Release Notes

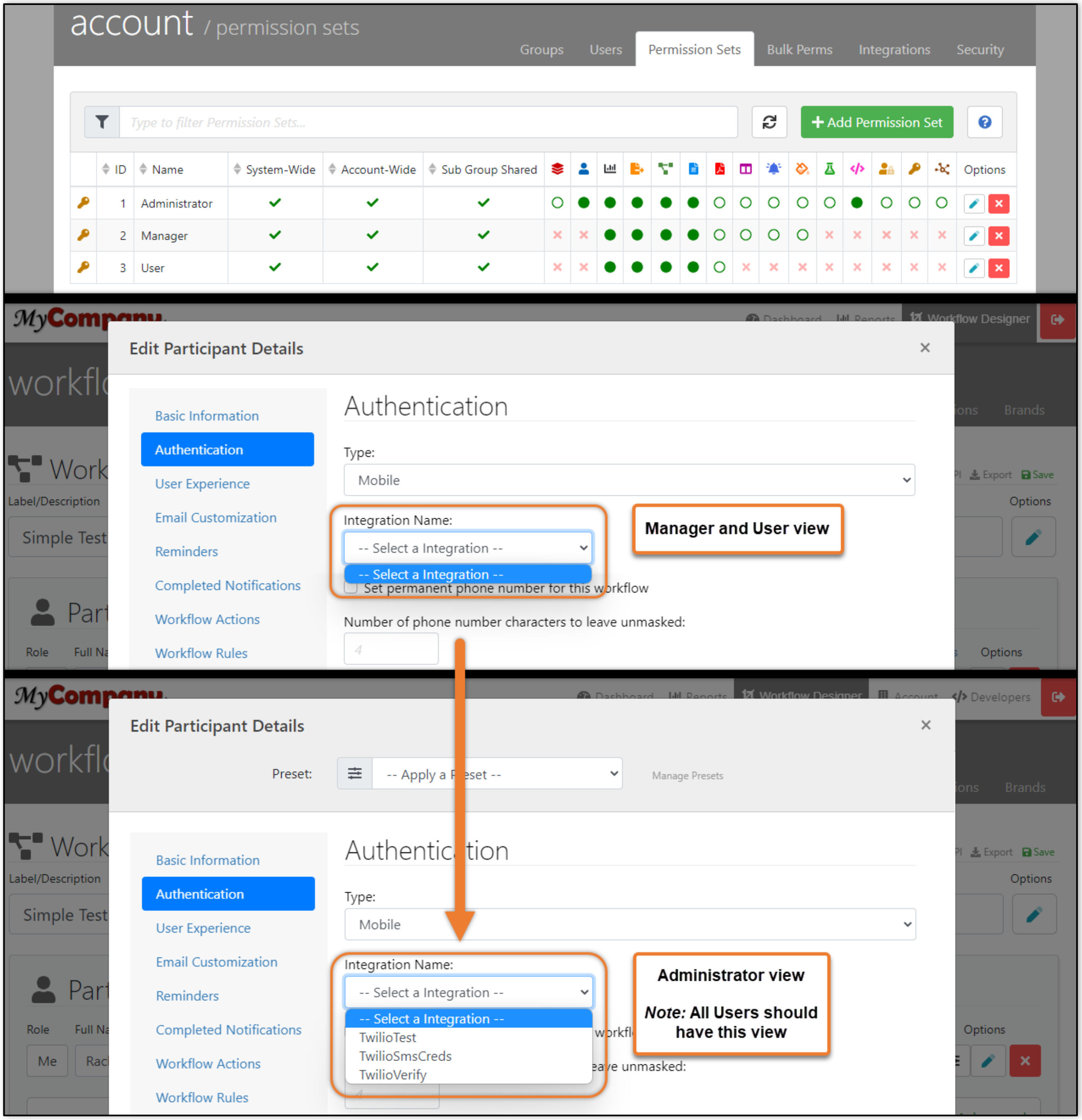


v5.15.9 Release — *Production Release Date: 11/3/2022*

Bug Fixes

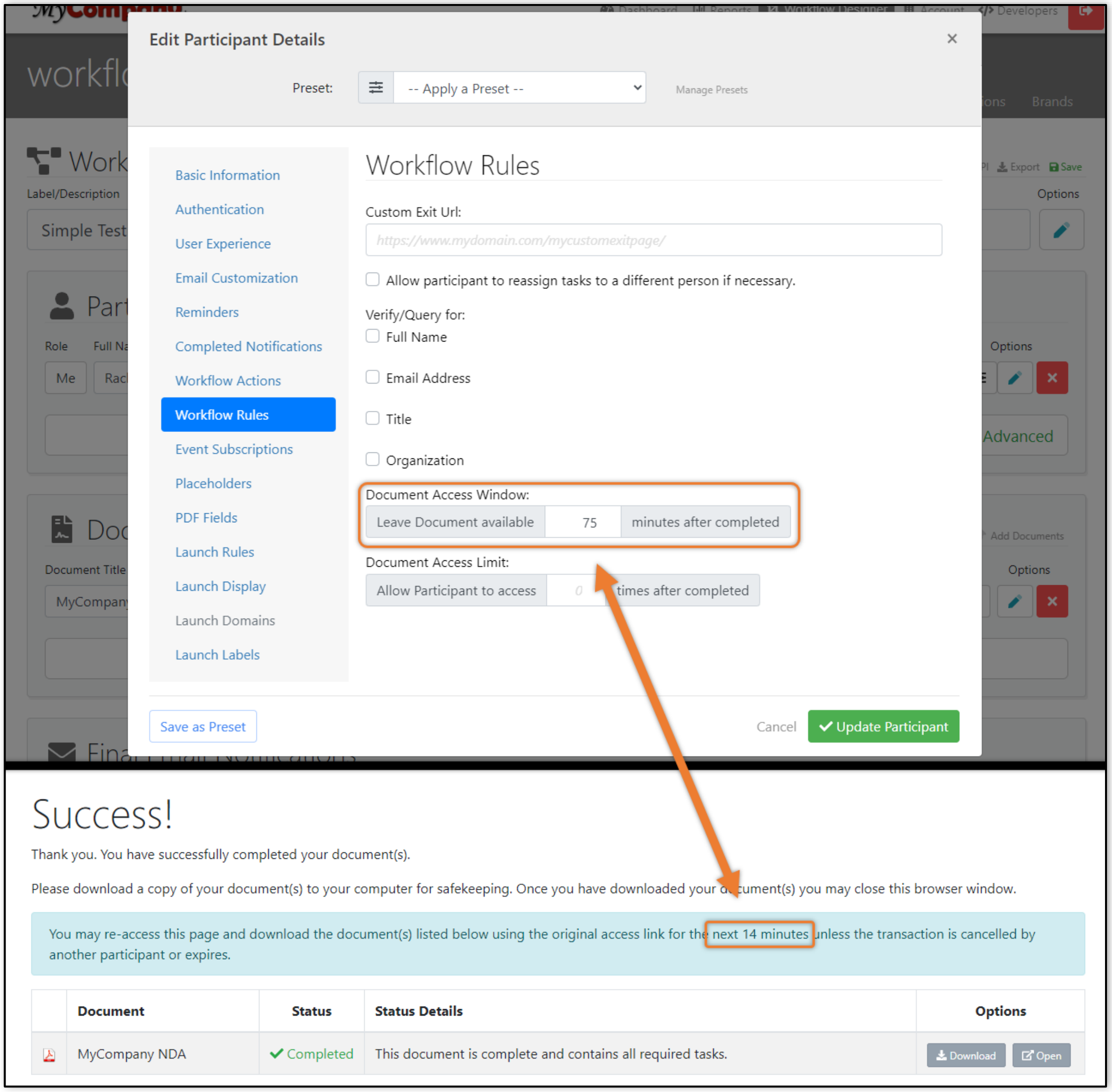
[PEP-5621] - Fixed issue where integrations for Mobile Authentication would not appear for users with Manager and User permissions. Users with Manager and User permissions should be able to select an integration from the drop-down for Mobile Authentication. Please see the images below for reference to Permission Sets and the view each user would see.

Release Notes

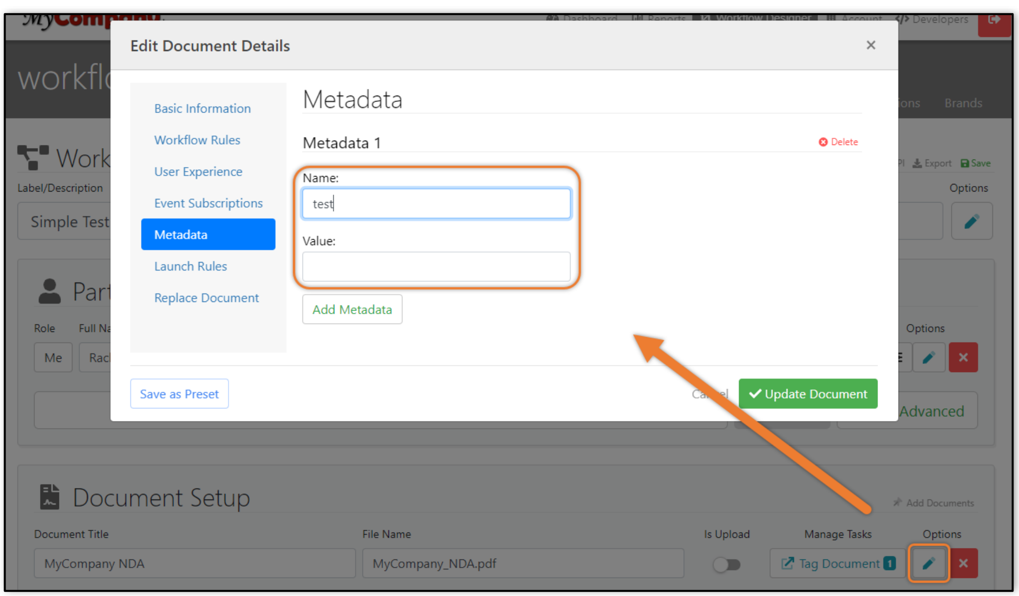


[PEP-5603] - Fixed issue where the *Document Access Window* message wasn't displaying the correct time remaining to access the completed documents. Please reference the image below of an example where the *Document Access Window* was set to 75 minutes and the message incorrectly says the user has 14 minutes.

Release Notes



[PEP-5428] - Fixed issue where the Metadata fields in the Document Editor would lose focus and prevent continuous typing after each keypress. Please reference the image below of an example Metadata field for more details.

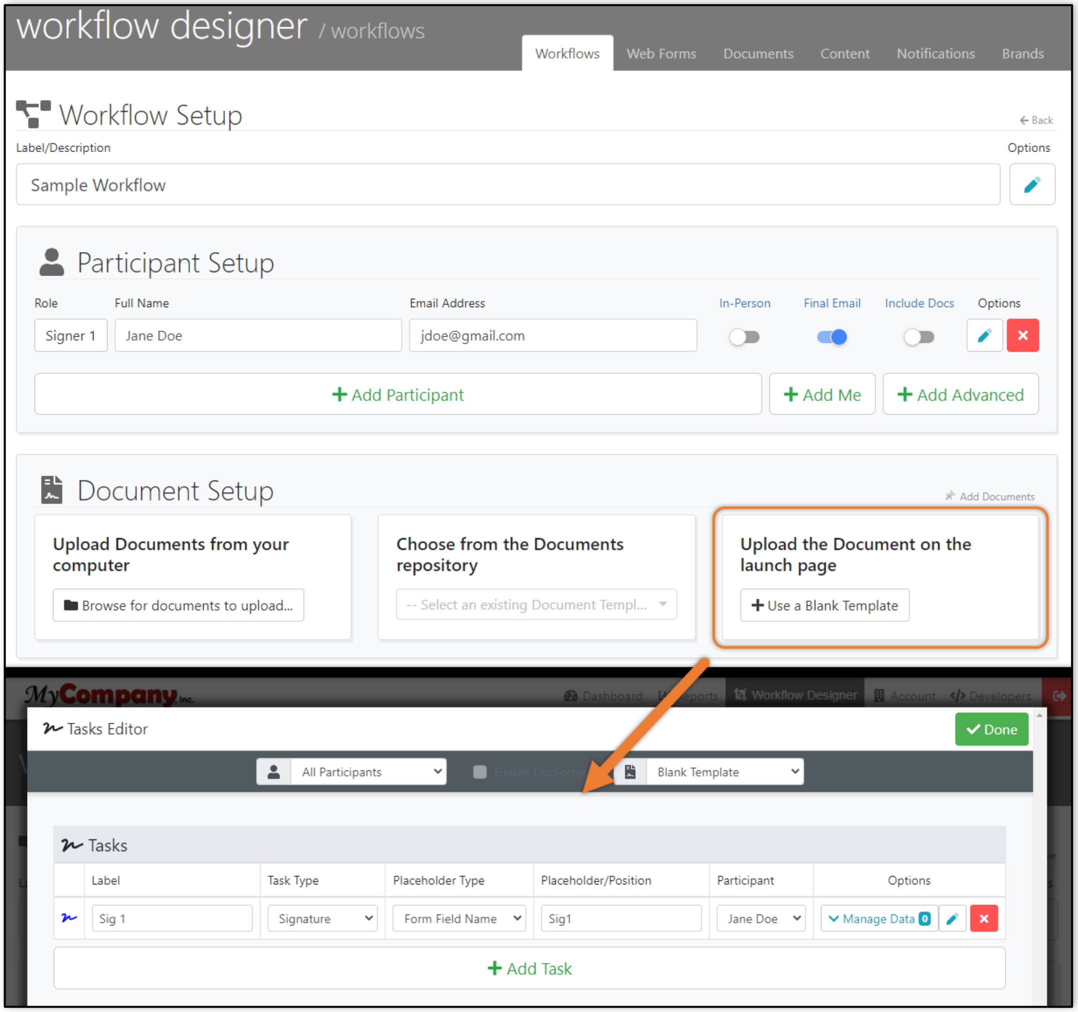


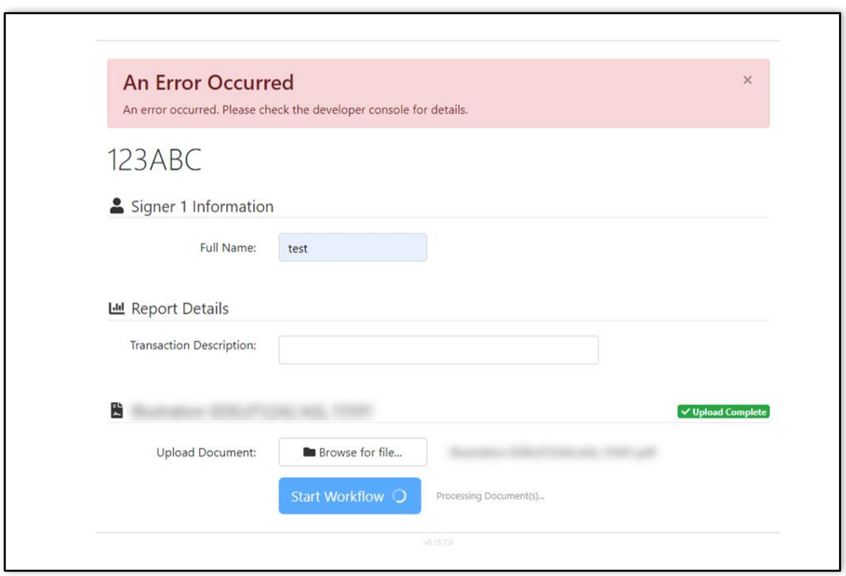
Release Notes

v5.15.8 Release *Production Release Date: 10/20/2022*

Bug Fixes

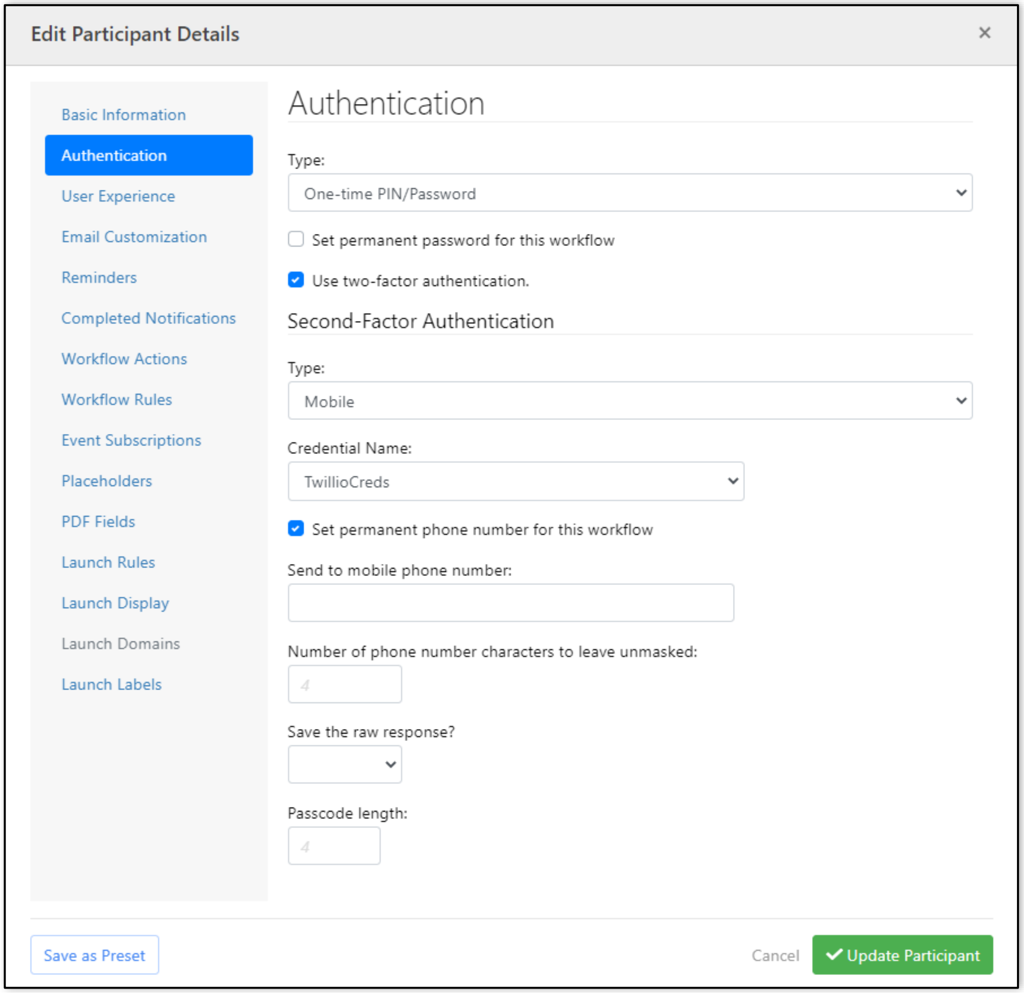
[PEP-5561] - Fixed issue where users were unable to launch workflows utilizing an upload document with a signature block. Reference the images below for an example of the Workflow settings and the error message seen on the launch page.



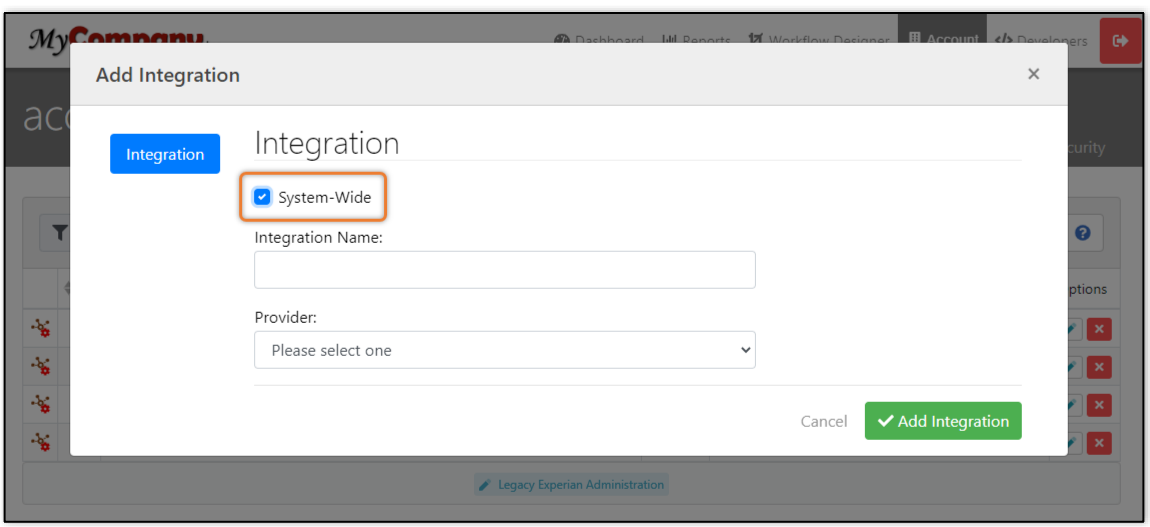


Release Notes

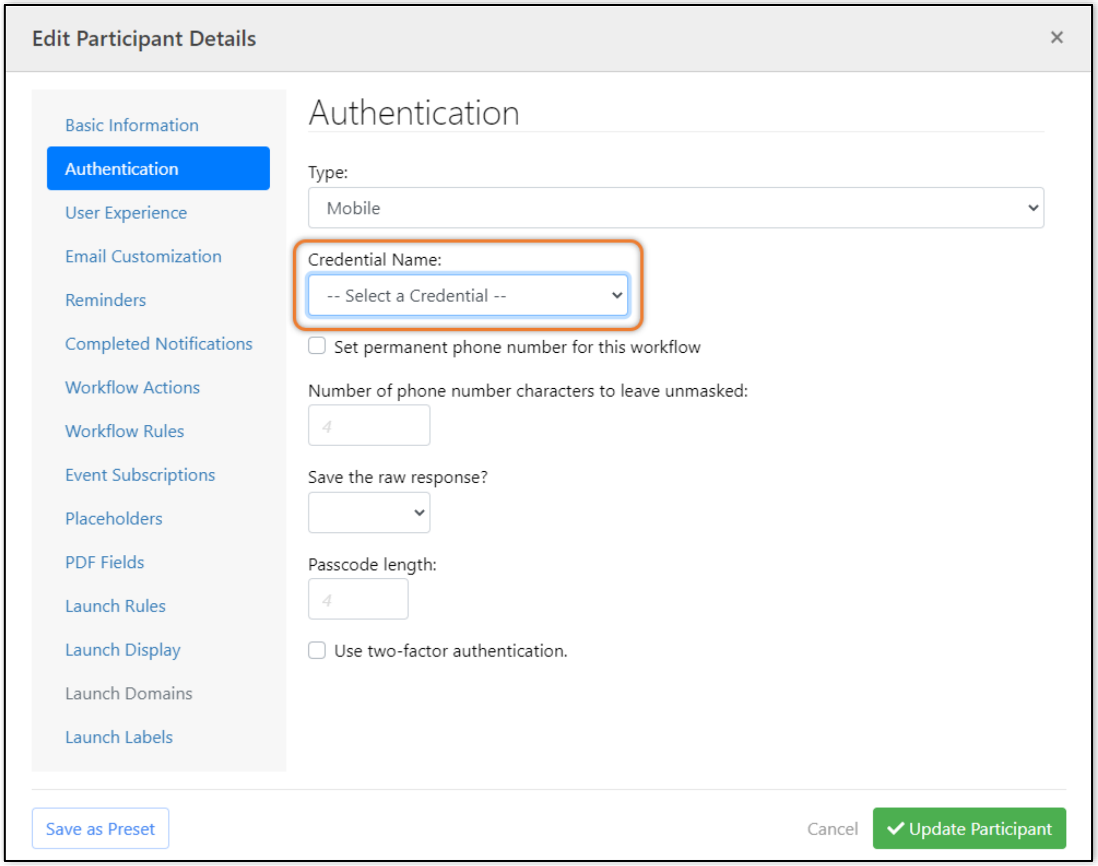
[PEP-5462] - Fixed issue where two-factor authentication failed when configured as *PIN/Password* first and *Mobile* second. Authentication data had an invalid character appended to it when a two-factor mobile authentication was used. Please see the image below for the authentication settings referenced.



[PEP-4792] - Fixed issue where System-Wide Integrations were not displayed for non-system admin users. Included System-Wide integrations to be available for Workflow Authentication options as well as visibility in the integrations list. Reference the images below for the System-Wide integration setting and an example of an where an integration could be utilized.



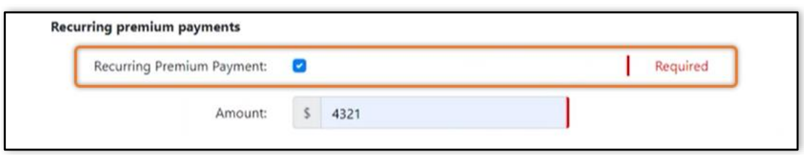
Release Notes



v5.15.7 Release ***Production Release Date: 10/6/2022***

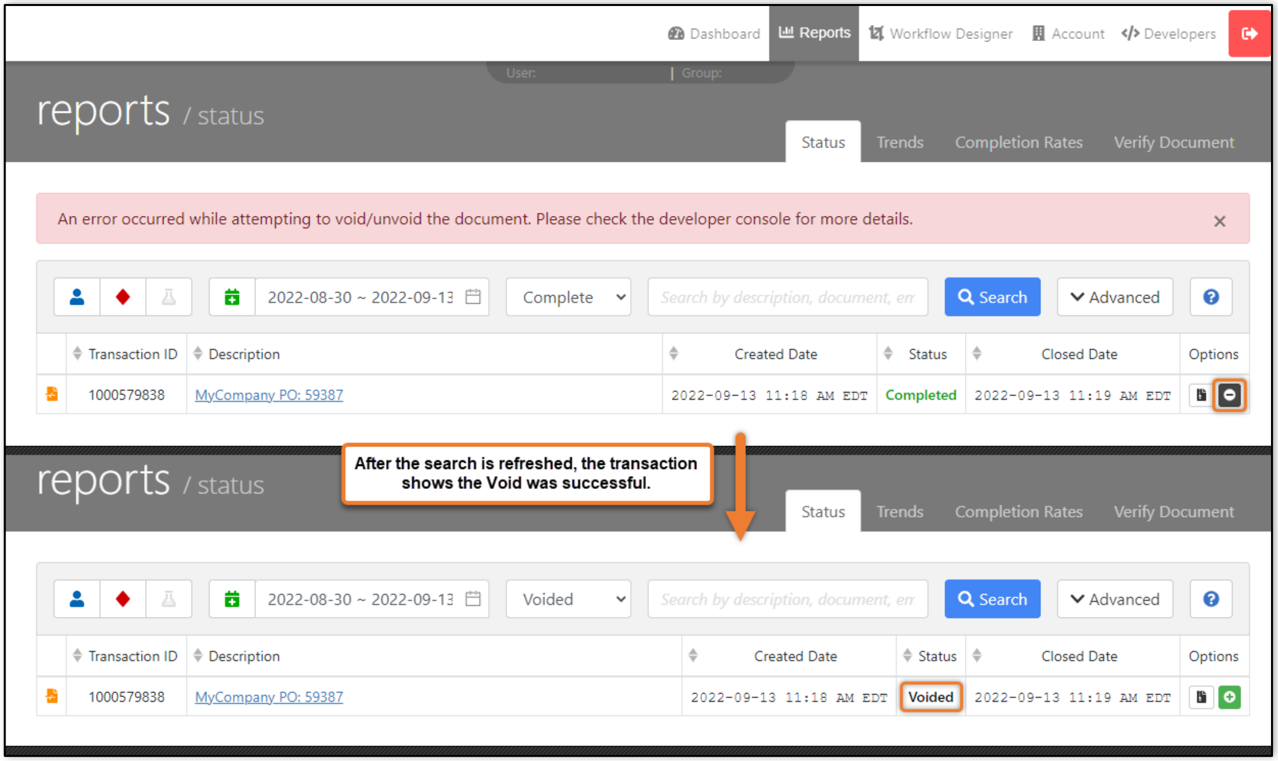
Bug Fixes

[PEP-5534]- Fixed issue with Web Form checkboxes utilizing Field Rules where if they were marked as "required" the system would not recognize they were checked. Once the user tried to click the *Save and Continue* button, the checkbox would be highlighted as required even though it was already checked. Please reference the image below for more details.



[PEP-5517] - Fixed issue where an error message would appear when attempting to Void a Completed transaction from the status reports page. The Void completes successfully but isn't reflected until the page is refreshed. Reference the image below for an example of the error message seen and an affected transaction.

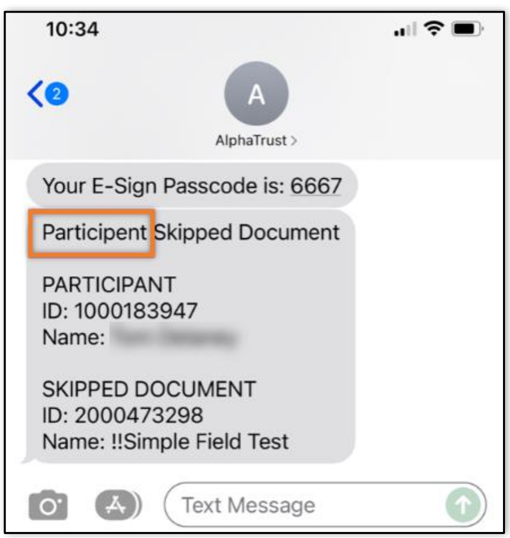
Release Notes

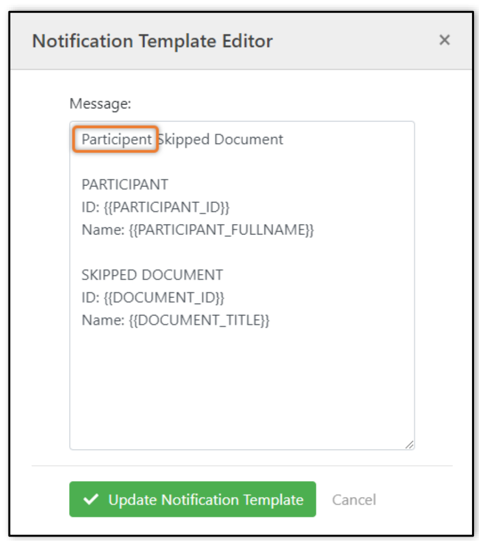


v5.15.6 Release ***Production Release Date: 9/22/2022***

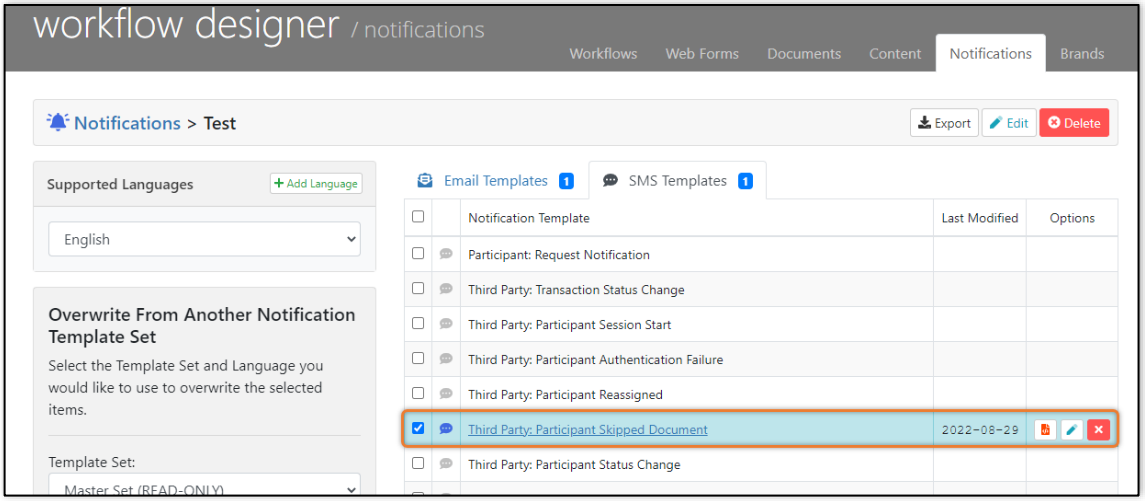
Bug Fixes

[PEP-5433] - Fixed issue where the word *Participant* was spelled incorrectly in the Participant Skipped Document SMS Notification template. Please reference the images below of an example text message, the Participant Skipped Document template, and location of the referenced template.

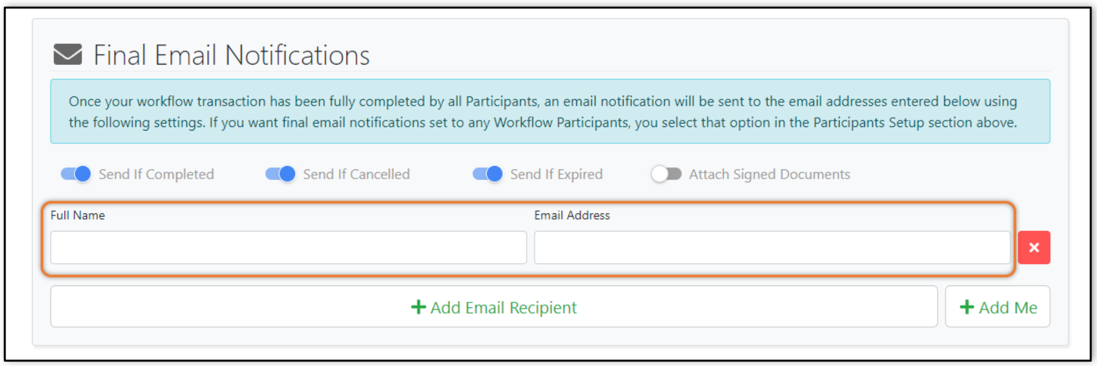




Release Notes



[PEP-5388] - Fixed issue where the workflow launch would fail if the Final Email Notifications were left blank. Note: if the fields are left blank, the Final Email Notification section will be ignored. Please reference the image below for more details.



[PEP-5345] - Fixed issue where the GetWorkflows() API call would not return ComboBox fields in the response. Added ComboBox as a Document Form Field return type for the GetWorkflows() API method.

[PEP-4955] - Fixed issue where, when signing on mobile, the task button may render outside of the document. Please reference the image below for more details.

Release Notes

v5.15.5.2 Release *Production Release Date: 9/8/2022*

Bug Fixes

[PEP-5496] - Fixed issue where the CreateTransactions() API call was not merging values into form fields.

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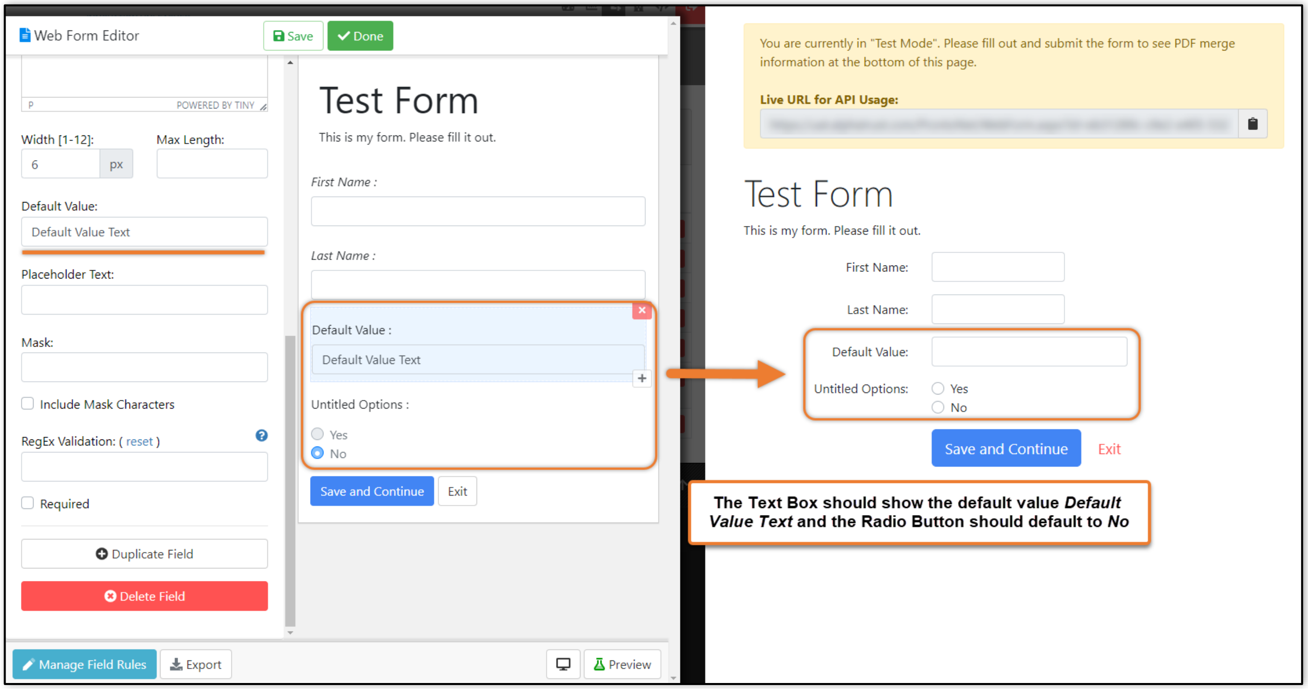
v5.15.5.1 Release *Production Release Date: 9/8/2022*

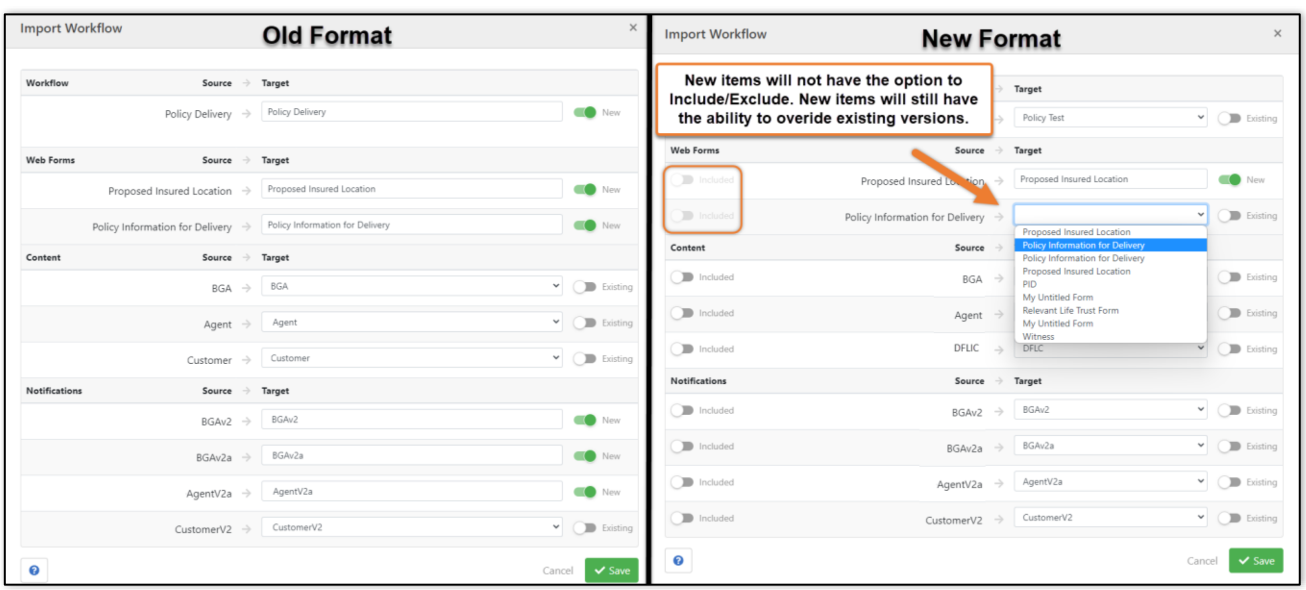
Bug Fixes

[PEP-5482] - Fixed issue where the default values for fields would not appear in Web Forms. Please see the image below of two examples of default values that should appear.

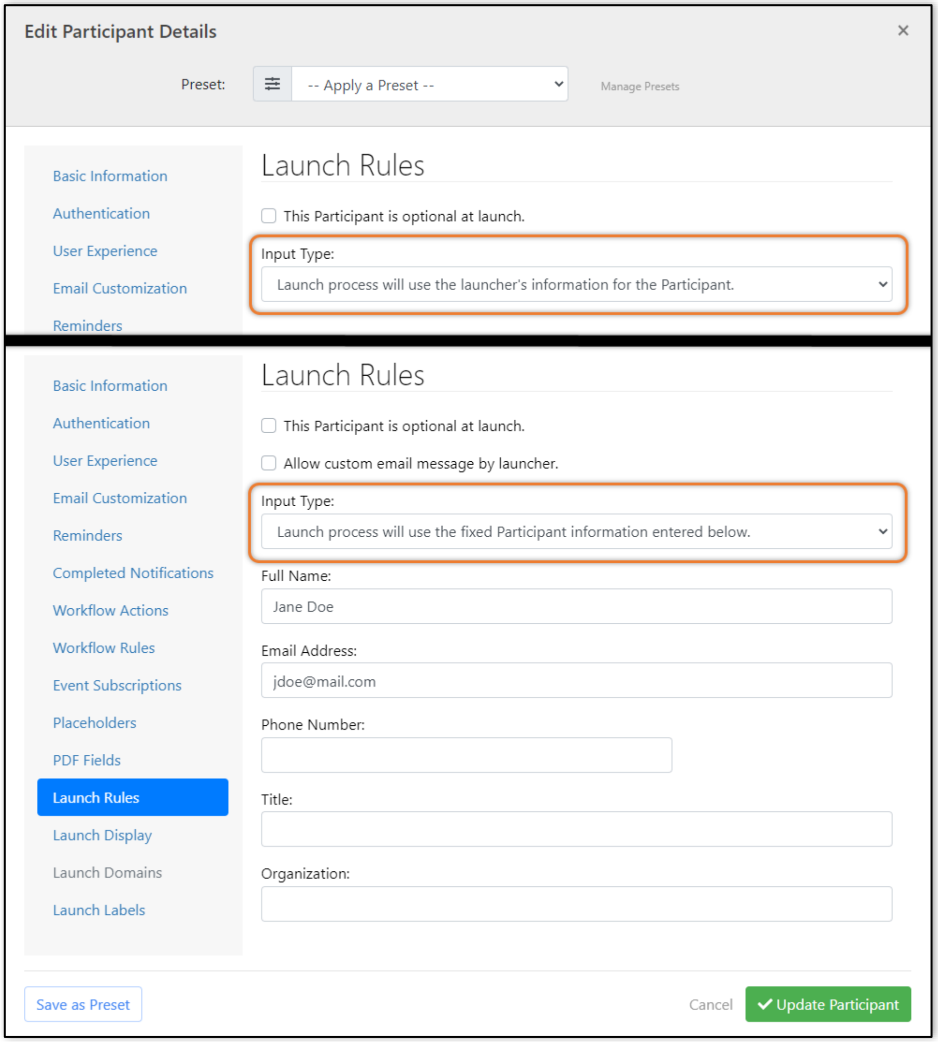


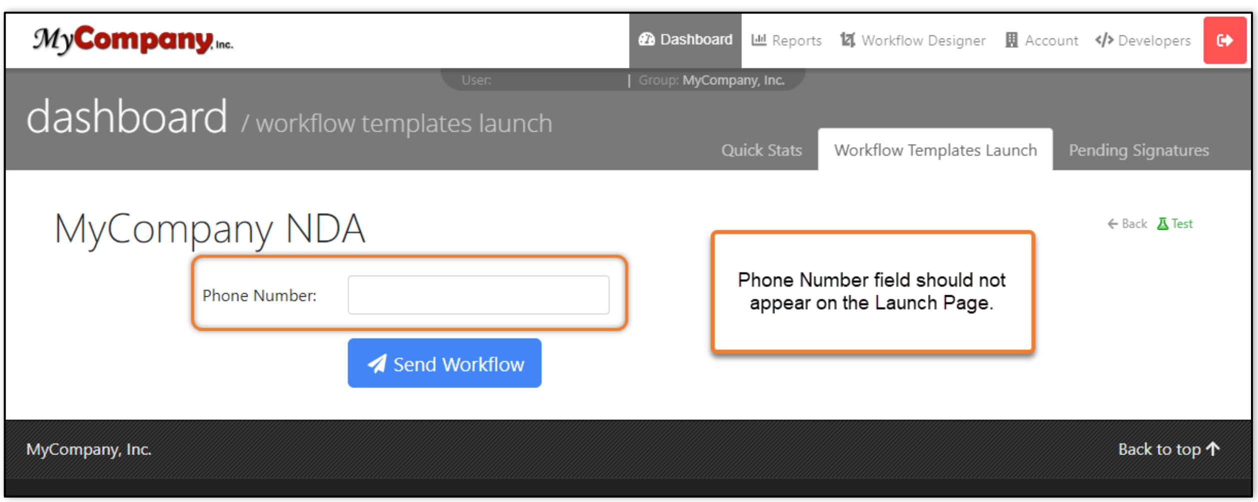
[PEP-5479] - Fixed issue where GetWorkflowLaunchRules() API method would error when calling a workflow created in a Sub Group.

[PEP-5464] - Fixed issue where users were not able to exclude or include existing referenced Web Forms, Content Sets, Brands, and Notifications for Workflow Imports. Added exclude/include options back into the Workflow Imports but now they are only available options on items that already exist. Please reference the image below for more details.



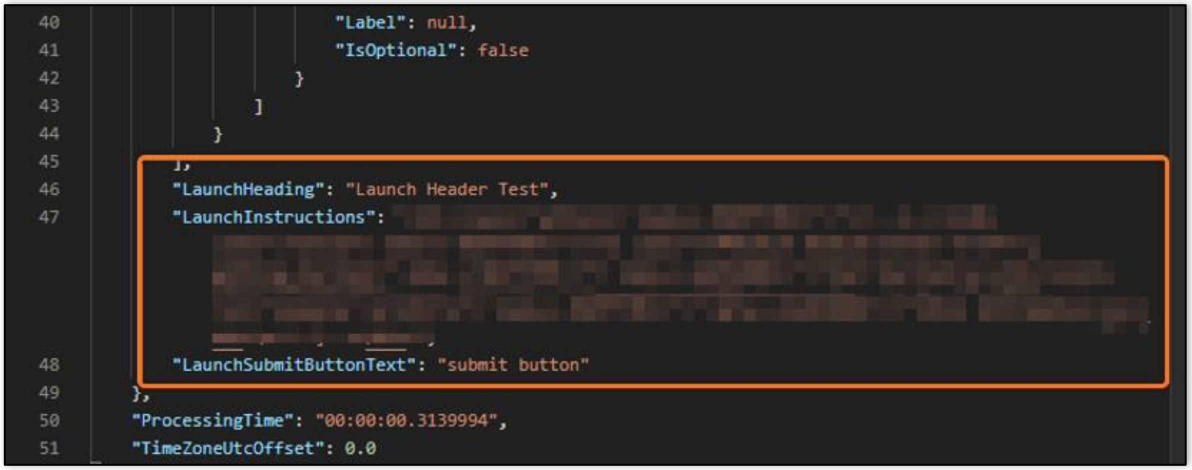
[PEP-5444] - Fixed issue where Participants with Input Types of *Launch process will use the launcher's information for the Participant* or *Launch process will use the fixed Participant information entered below* would cause the Launcher to be prompted for a Phone Number on the Launch Page even though it is not required or needed. Images of the Workflow settings and Launch Page can be seen below.





Release Notes

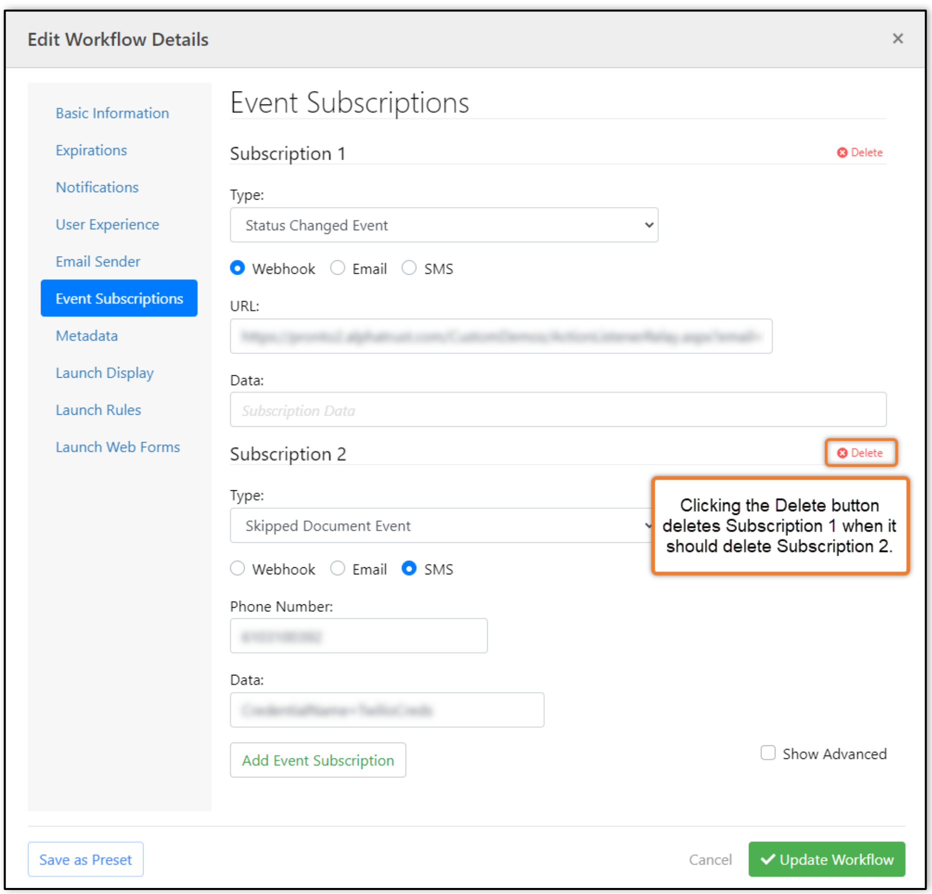
[PEP-5356] - Fixed issue where the GetWorkflowLaunchRules() API didn't return Launch Display properties. Added the Workflow Launch Display properties for API-driven launch pages. Three new properties have been added to the API response call "LaunchHeading", "LaunchInstructions", and "LaunchSubmitButtonText". Please see the image below for an example of the API response call.



[PEP-5287] - Fixed issue where the CreateTransactions() API validation error message did not include the document index and document title/name.

[PEP-5285] - Fixed issue where Event Subscriptions for Authentication Failed Events would not be sent. Added logic to trigger web hook on authorization failures.

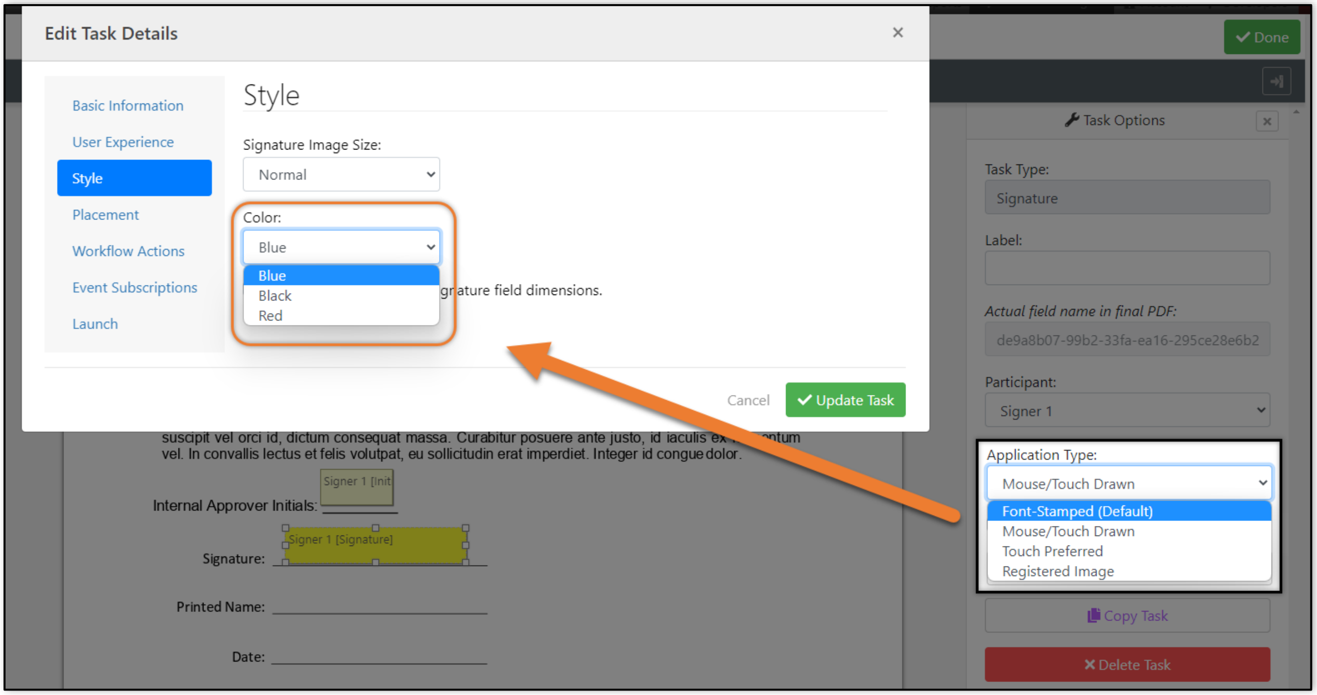
[PEP-5279] - Fixed issue where deleting a subsequent Workflow Event Subscription would delete the first Event Subscription. Please see the image below for more details.



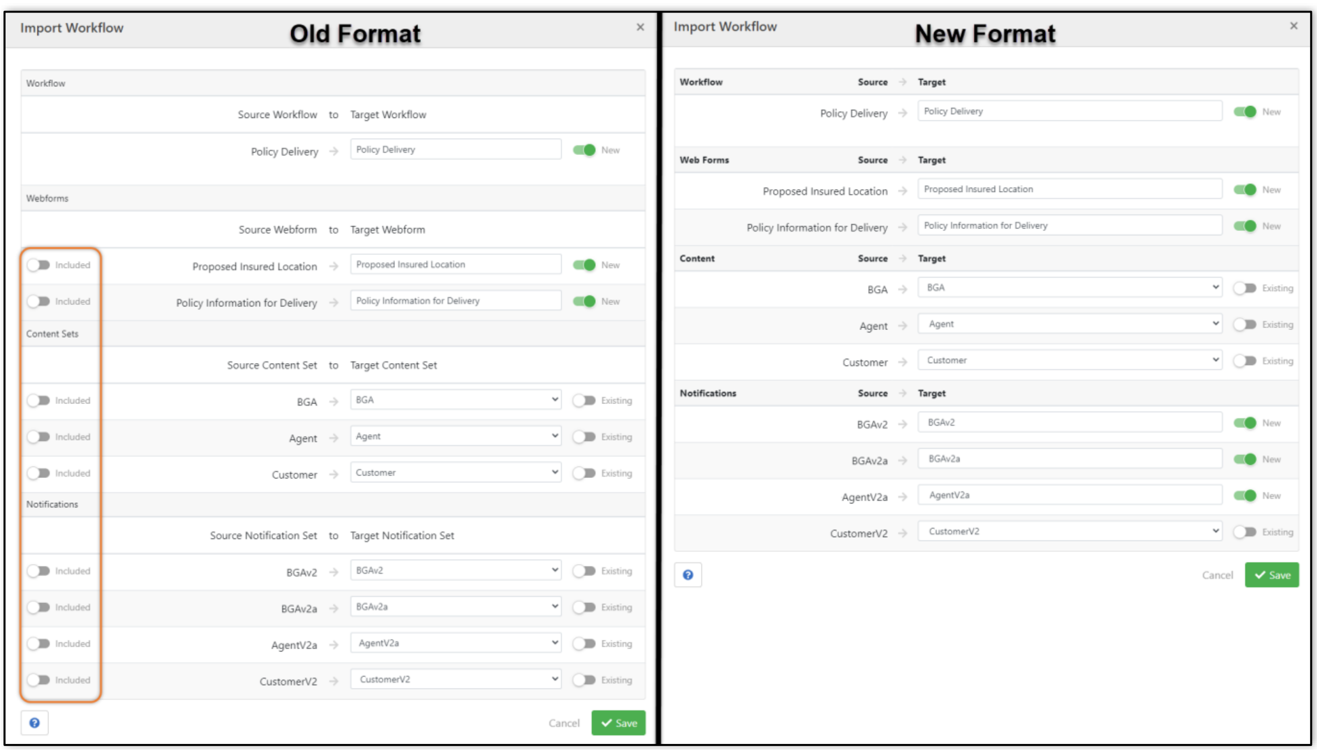
[PEP-5257] - Fixed issue where Web Form fields would not appear or disappear according to the Field Rules.

Release Notes

[PEP-5249] - Fixed issue where signature Application Types would not appear in the Signature color selected. Please see the image below for more details.



[PEP-5180] - Fixed issue where if a Web Form, referenced in a Workflow, is excluded from an imported Workflow the Workflow would not launch and an error would be shown in reference to the excluded Web Form. Removed the option to exclude referenced Web Forms, Content Sets, and Notifications for Workflow Imports.



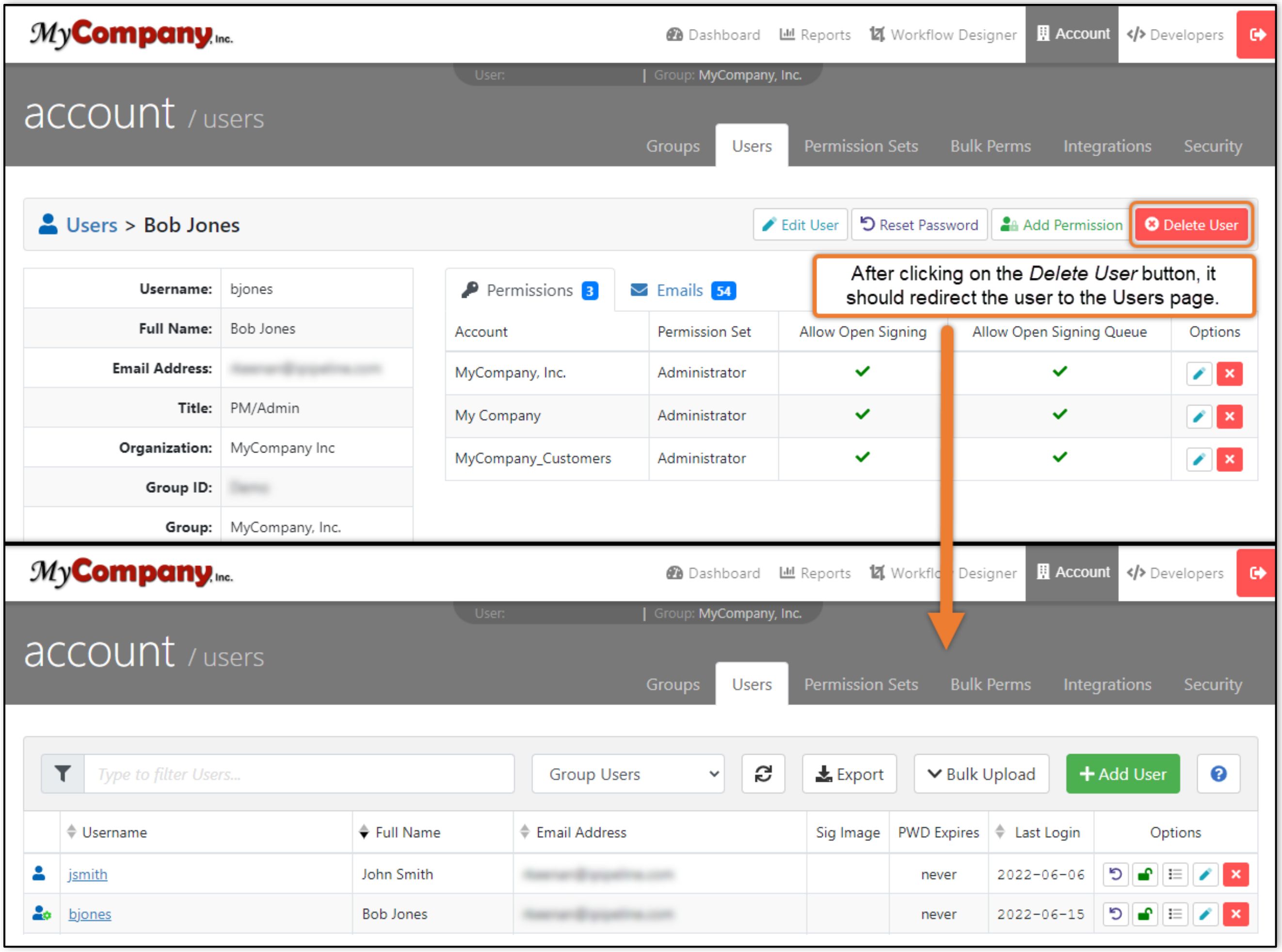
[PEP-5123] - Fixed issue with inserting new Legacy Experian integration credential data.

[PEP-5121] - Fixed issue where webhooks with no retry limit set only attempt to retry two times. The webhooks should retry for the default setting, which is three days.

Release Notes

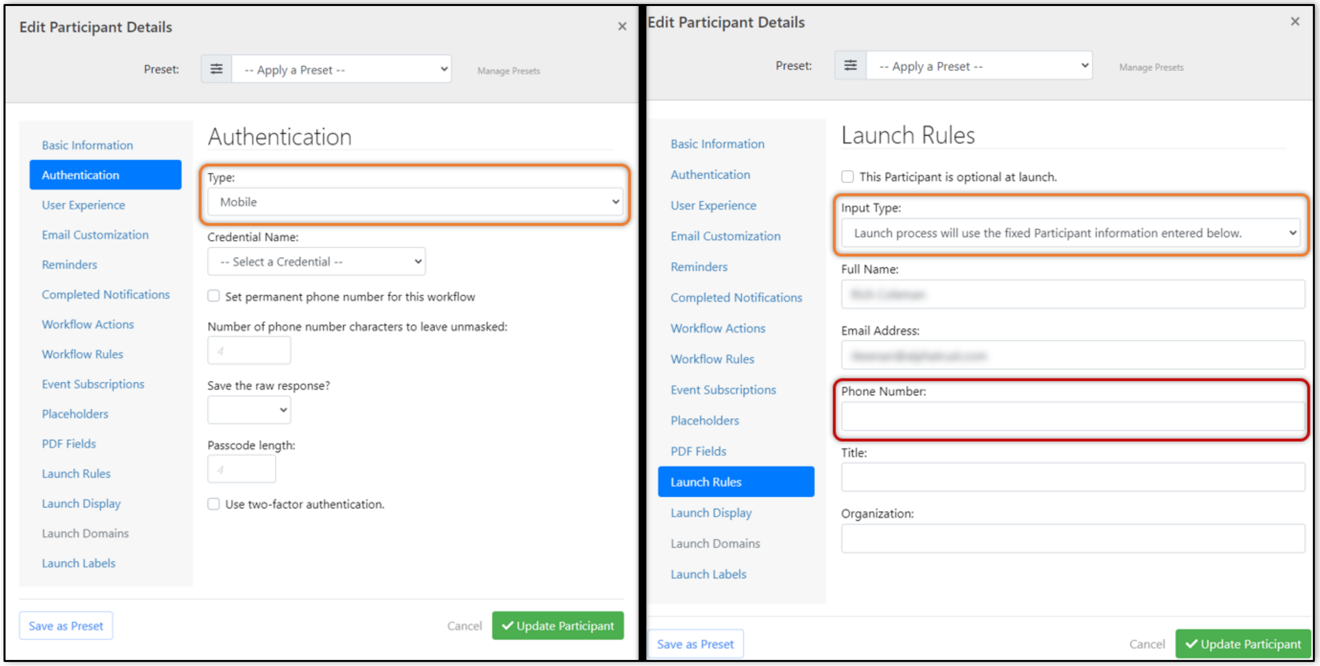
[PEP-5106] - Fixed issue where the system was attempting to seal documents that are not in a complete status. Added logic to check for IsFinal when reporting missing final file.

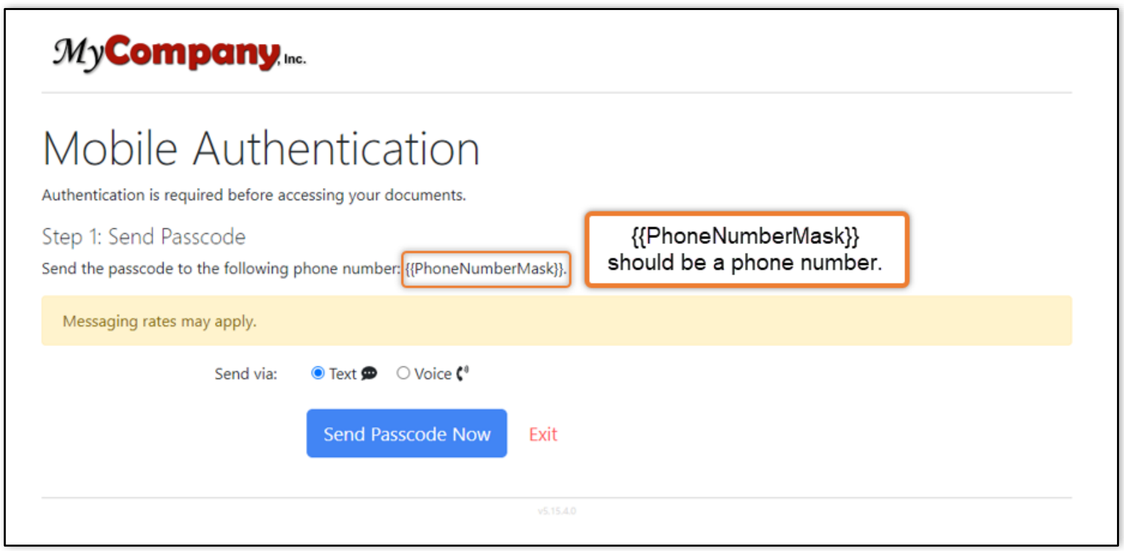
[PEP-4860] - Fixed issue where a user is not redirected properly after deleting an account on the User details page. Users should be redirected back to the User page. Please see the image below for more details.

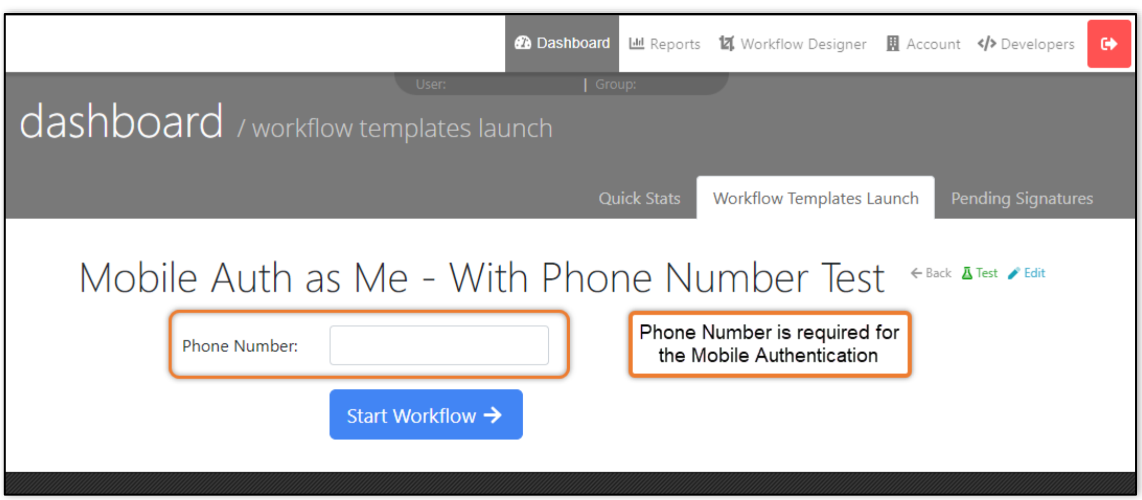


[PEP-2187] - Fixed issue where the phone number placeholder was displaying instead of the phone number when launch Input Type was *Launch process will use the fixed Participant information entered below*. Also fixed issue where when Authentication type is set to Mobile and a fixed Participant is used with no phone number provided, the phone number was not requested when the Workflow was Launched. The images below show the Workflow Authentication and Launch Rules settings, the phone number placeholder that will be removed, and the Phone Number field that is requested if there is no phone number in the fixed participant information.

Release Notes







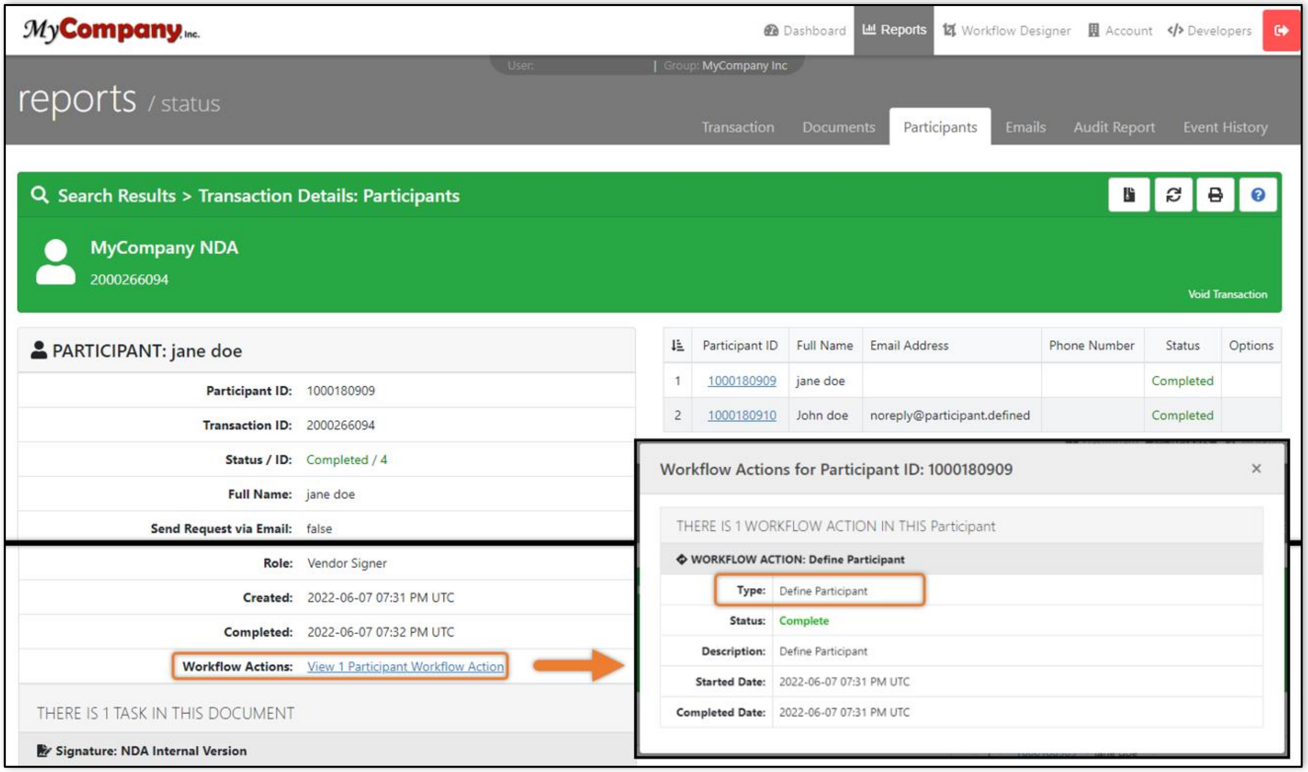
Release Notes

v5.15.4 Release *Production Release Date: 8/25/2022*

Bug Fixes

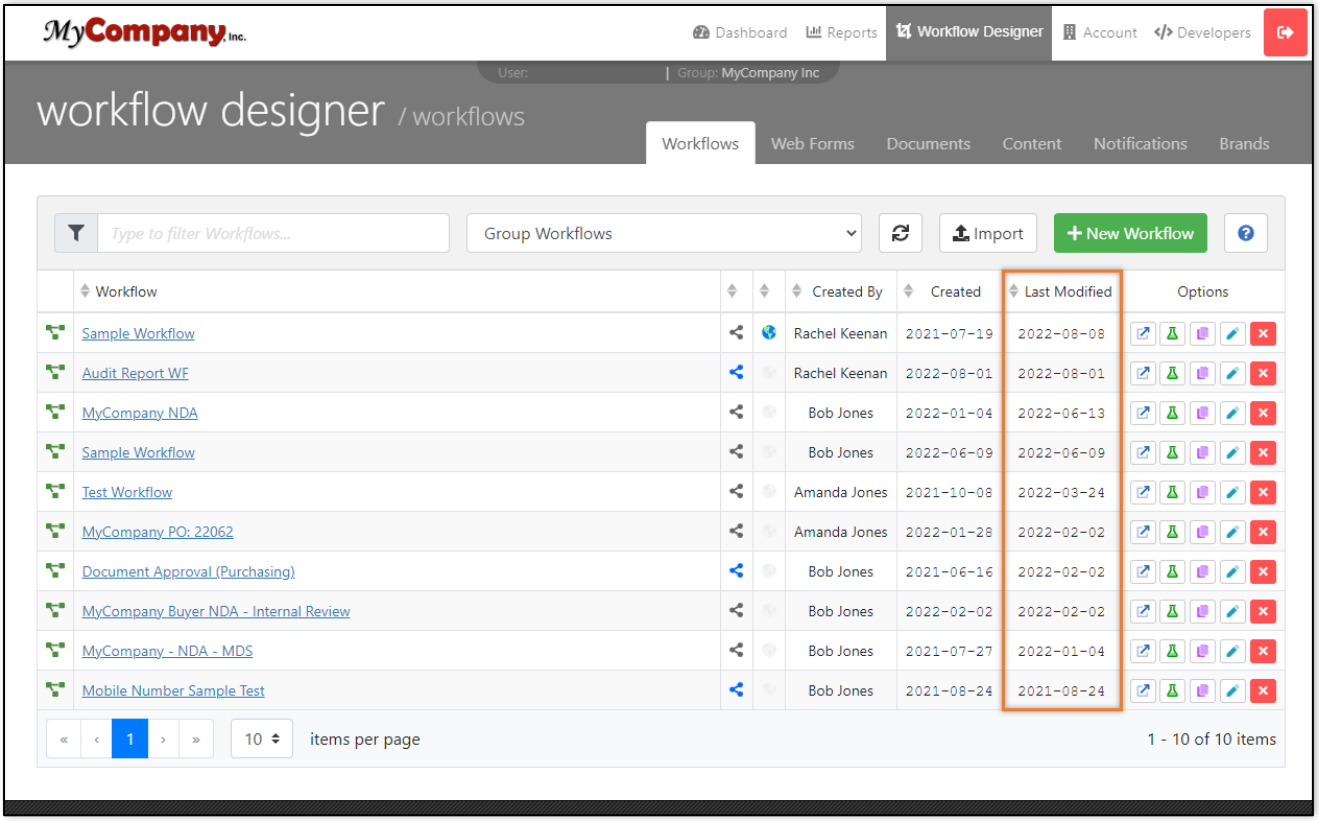
[PEP-5330] - Fixed issue where webhook security tokens were expiring too quickly. Users were seeing intermittent failures that were occasionally resolved by multiple retries.

[PEP-5313] - Fixed issue where Document Workflow Actions in the Control Panel were displaying the incorrect action label. Please see the image below of where the Workflow Actions in the Transaction Status is located and an example of a correct action label.

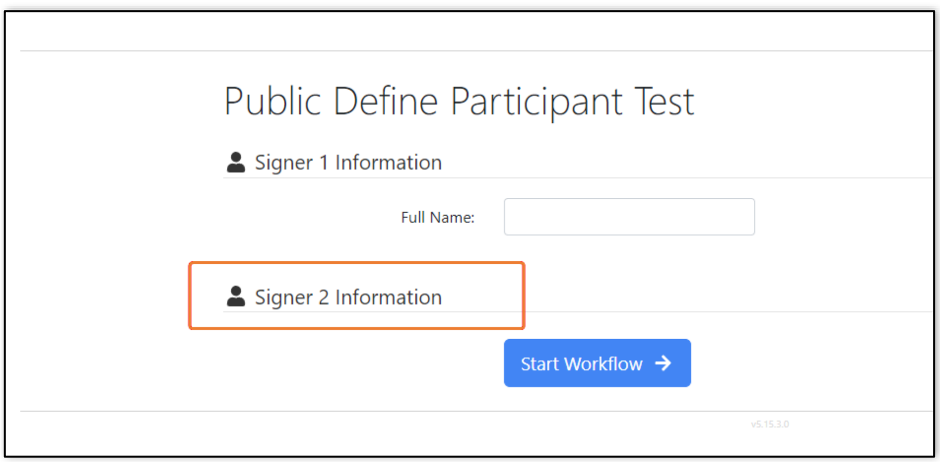


[PEP-5271] - Fixed issue where it was difficult to find recently updated Workflows and Web Forms. Updated the default sorting from alphabetical to Last Modified. Please reference the image below for more details.

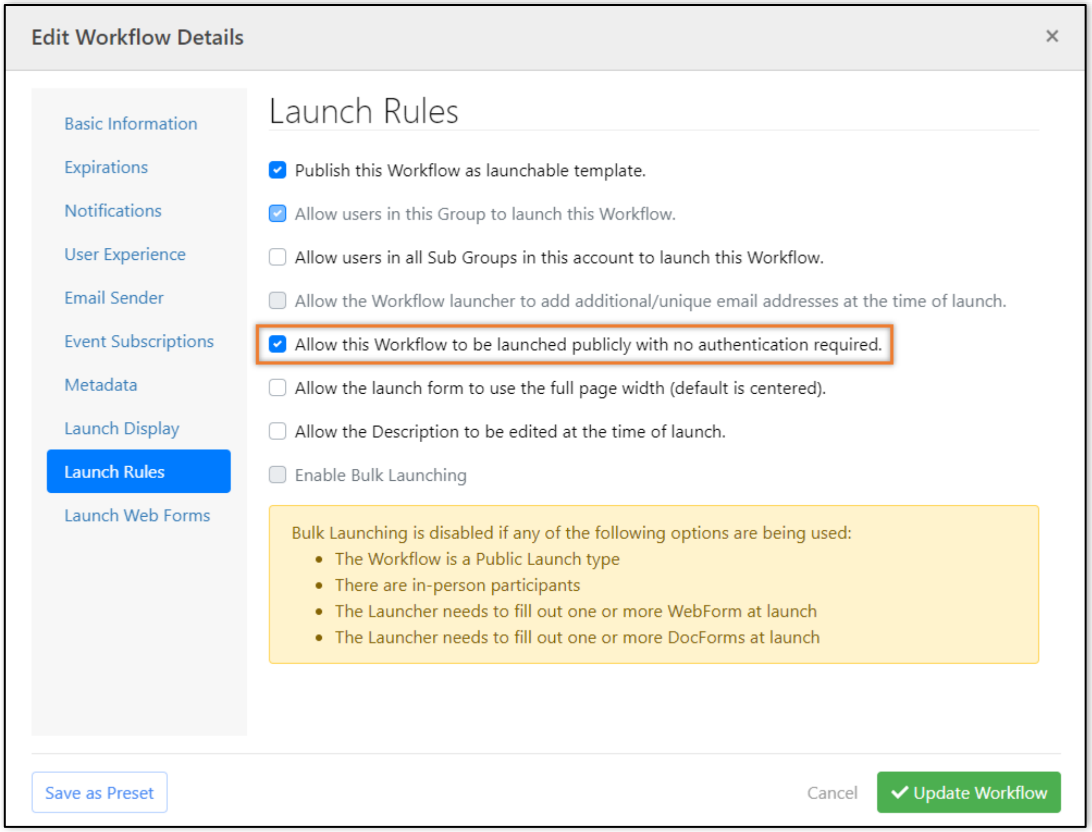
Release Notes



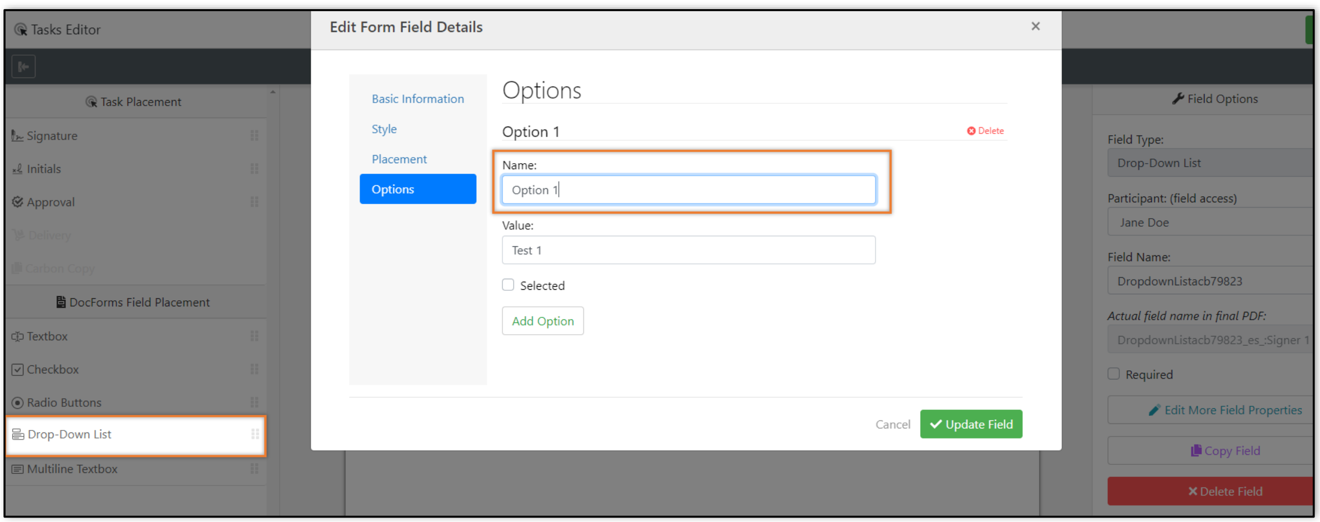
[PEP-5270] - Fixed issue with Publicly Launched Workflows where, when using the Defined Participant Workflow Action, the second participant to be defined was showing unnecessarily for the Launcher. The second signer information should not appear on screen for the launcher as it was to be defined by the first participant. Images of the Workflow settings and issue can be seen below.



Release Notes

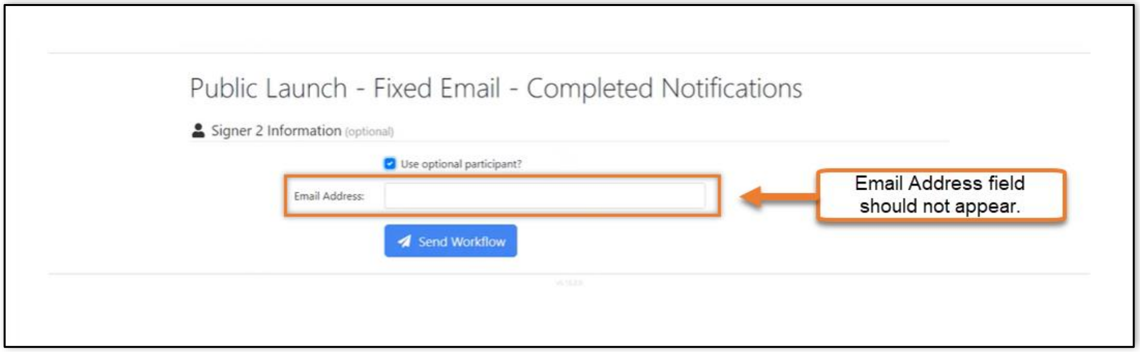


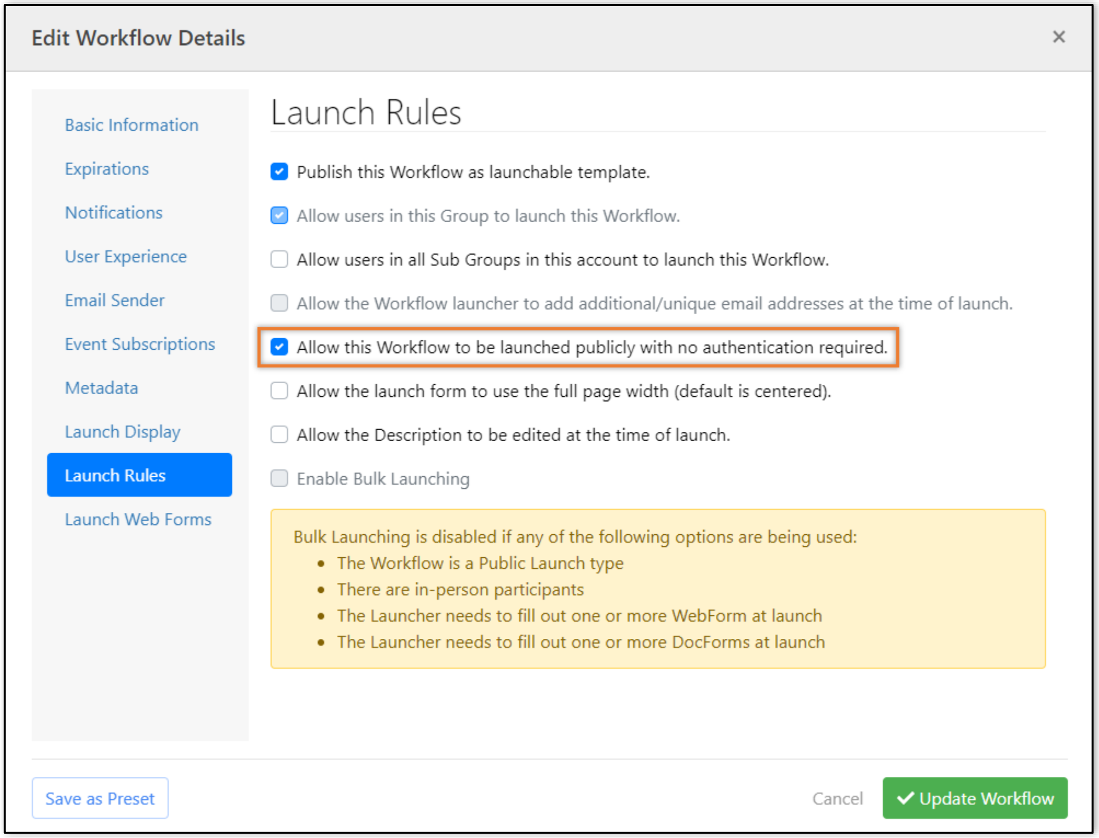
[PEP-5250] - Fixed issue where a DocForms Drop-Down List ‘Name’ field would lose focus and prevent continuous typing after each keypress. Please reference the image below of the example Drop-Down List for more details.



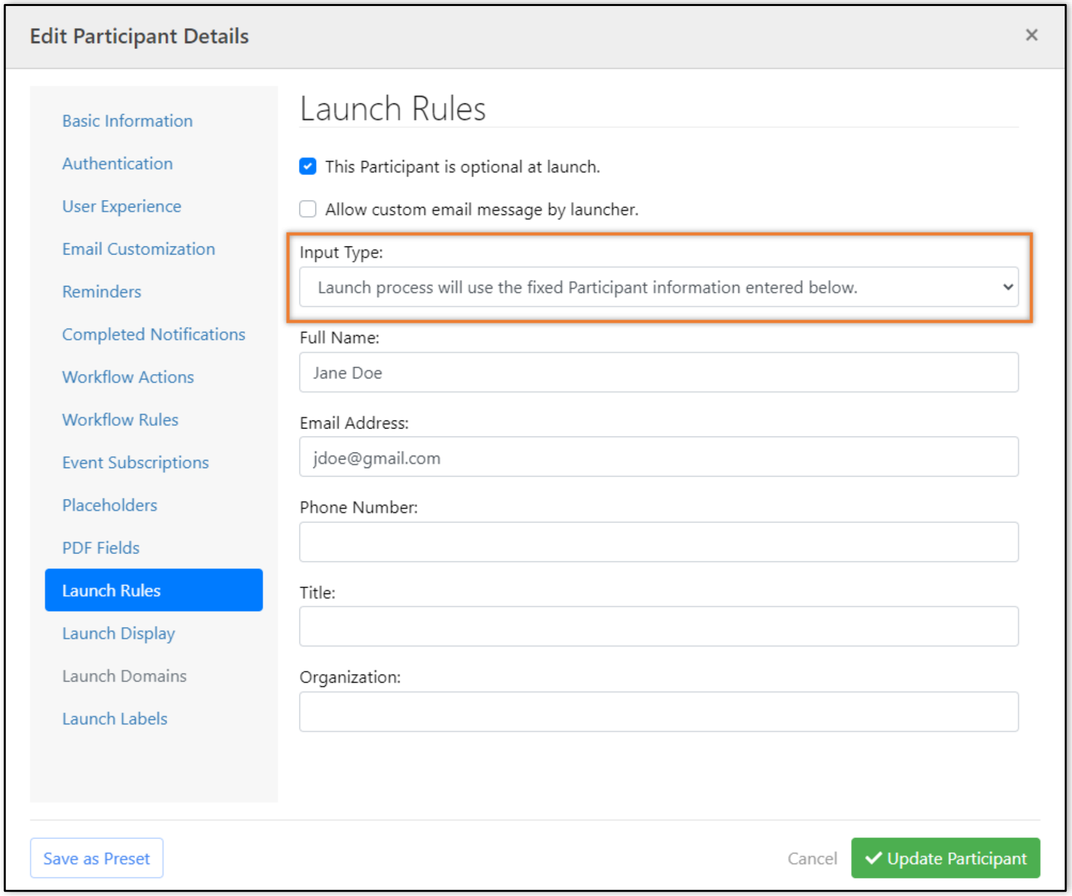
[PEP-5248] - Fixed issue with Publicly launched Workflows’ final notifications where the ‘Email’ field would appear on the Launch screen even though a fixed Participant Email was set. In this scenario no Email Address should have been asked for as a fixed Email Address was set for the Participant. Images of the Workflow settings and Launch Page can be seen below.

Release Notes





Release Notes

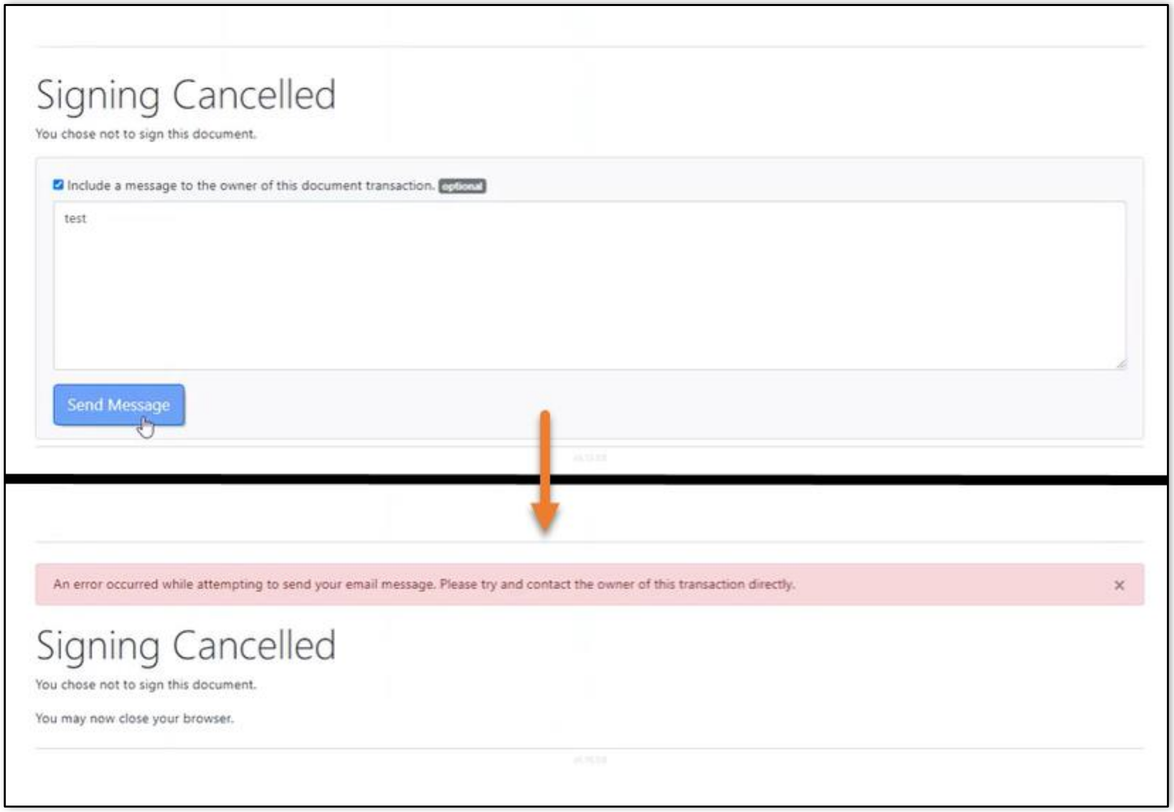


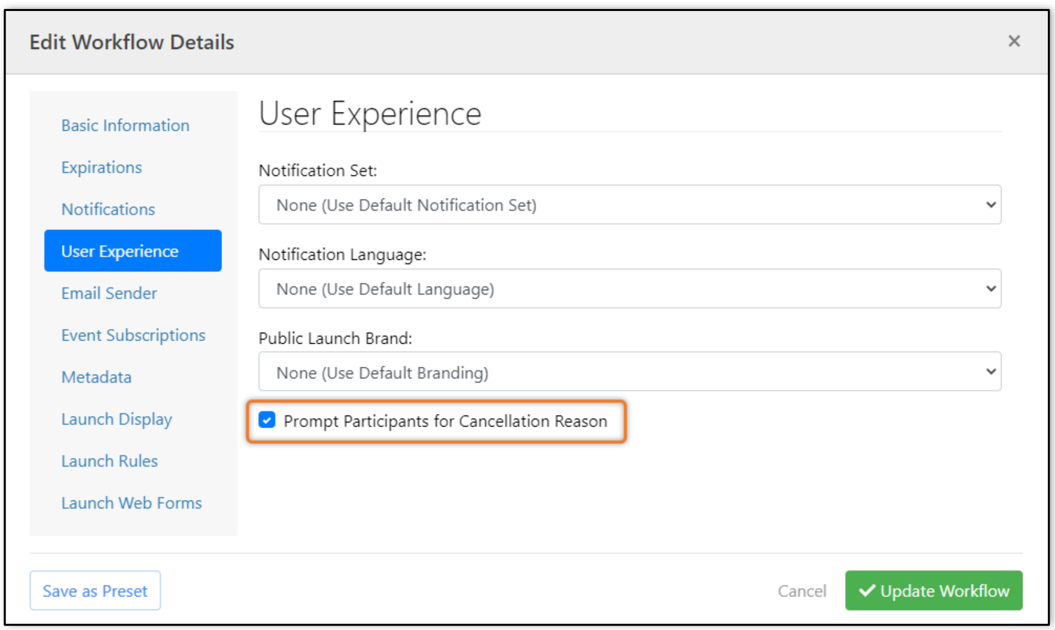
[PEP-5208] - Fixed issue with multiline textboxes on DocForms where only one line of text would be shown at a time. The textbox should have wrapped the text for users to easily read and enter information. Please see the image below for an example of the issue.

[PEP-5105] - Added database query performance improvements.

[PEP-5049] - Fixed issue where when sending a cancellation reason on the Exit Page it would show an unnecessary error message. Images of the Workflow setting, Exit Page, and error message can be seen below.

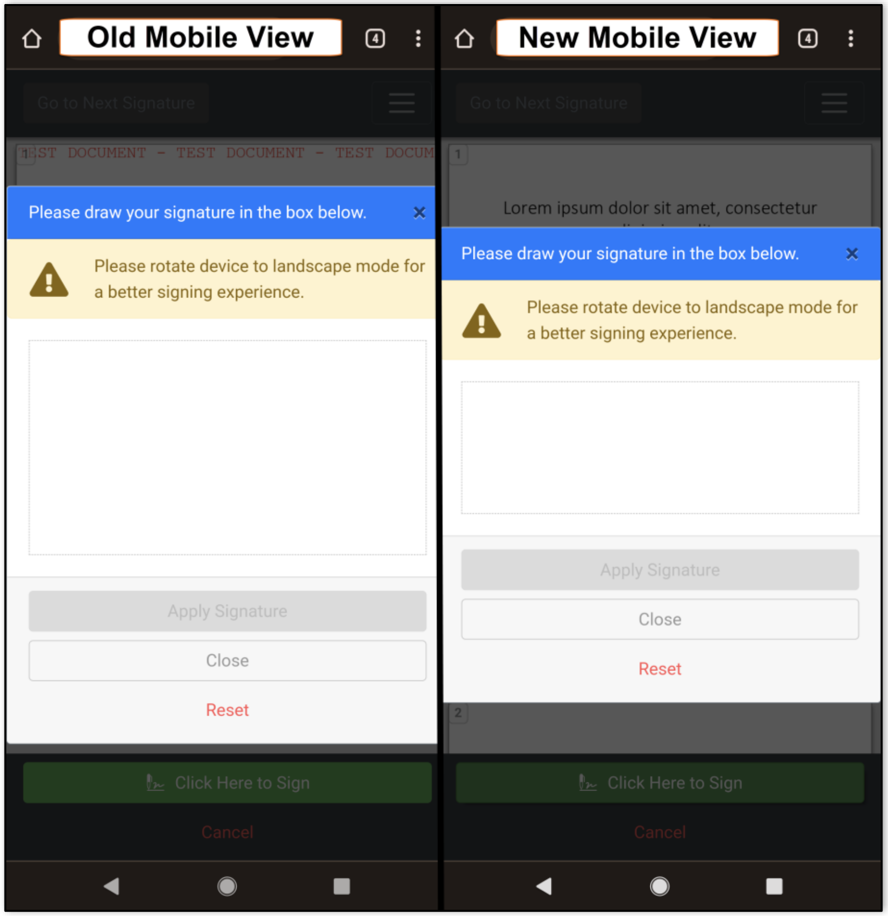
Release Notes

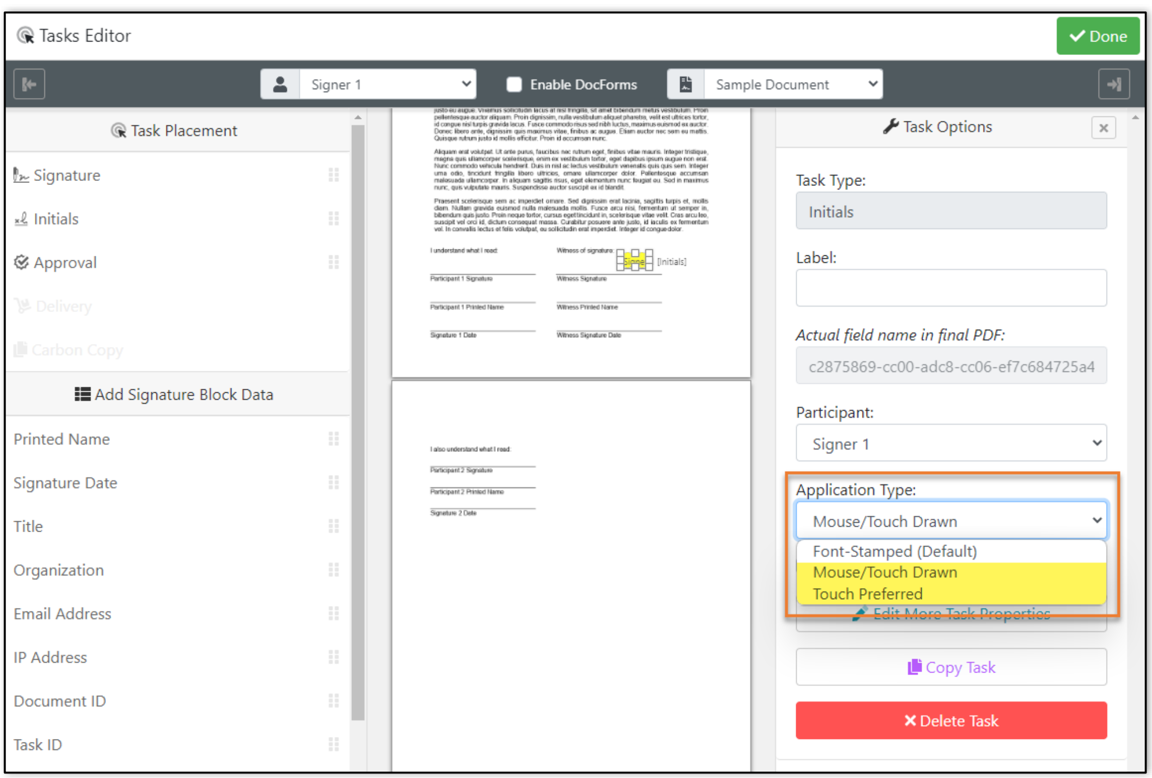




[PEP-5030] - Fixed issue where the touch/mouse signing canvas made it difficult for users to see the orientation of the document when signing. Adjusted the touch/mouse signing canvas to be a responsive 3/1 ratio for signatures, and a proper 1/1 ratio for initials. Note: This update only affects signing tasks that have the Application Type set to Mouse/Touch Drawn and Touch Preferred. Please reference the images below for a comparison of the old and new touch/mouse signing canvas and the Application Type setting referenced.

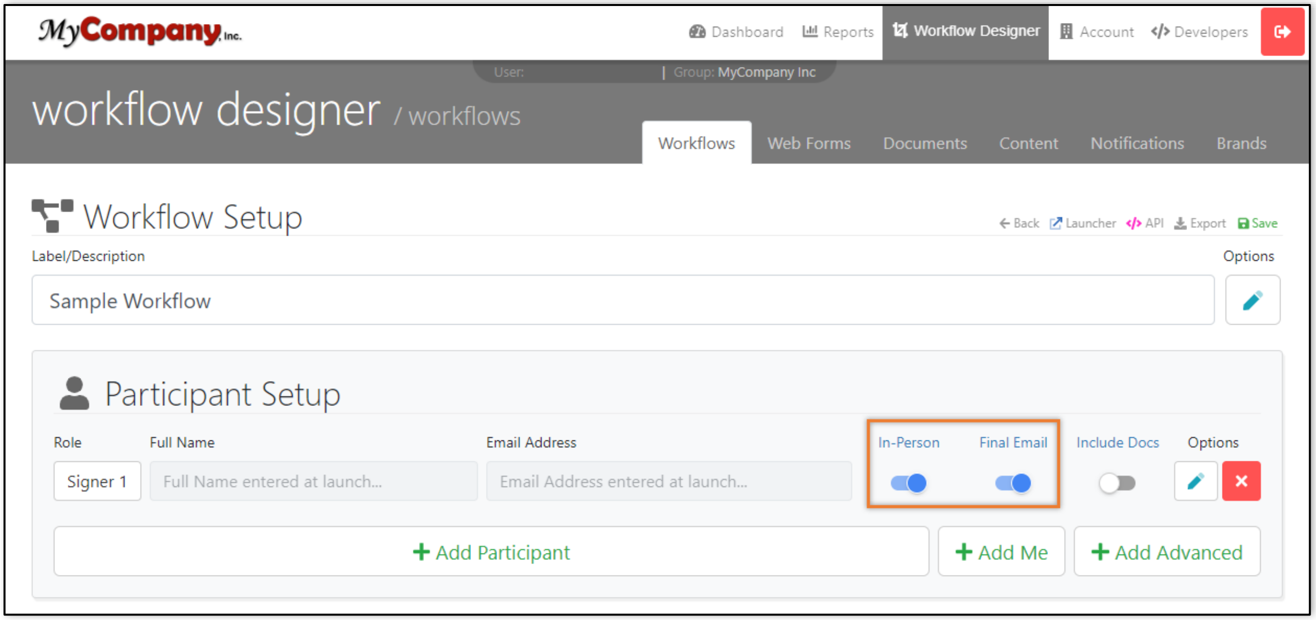
Release Notes

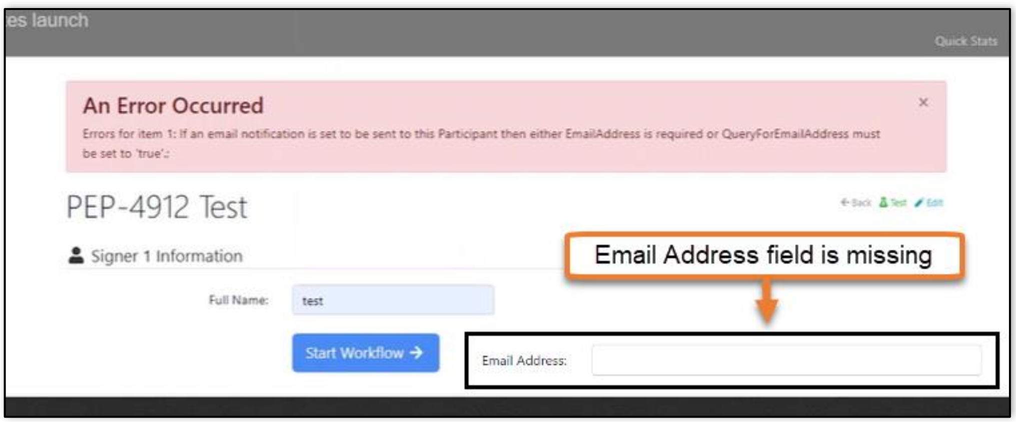




[PEP-5029] - Fixed issue where In-Person Participants with "Final Email" enabled would not show the email field at Launch. The Email Address field should have appeared on the Launch screen for the Participant to receive the "Final Email". Images of the Participant setup, launch screen, and error message can be seen below.

Release Notes





v5.15.3 Release *Production Release Date: 8/11/2022*

Bug Fixes

[PEP-5158] - Fixed issue for HTML documents where if the CSS link in the <head> tag contained CSS with the word 'error' as selectors in the style, the signing attempts resulted in seeing the error message "process cannot continue". Please see the image below for examples of the word 'error' being used as selectors in the style.

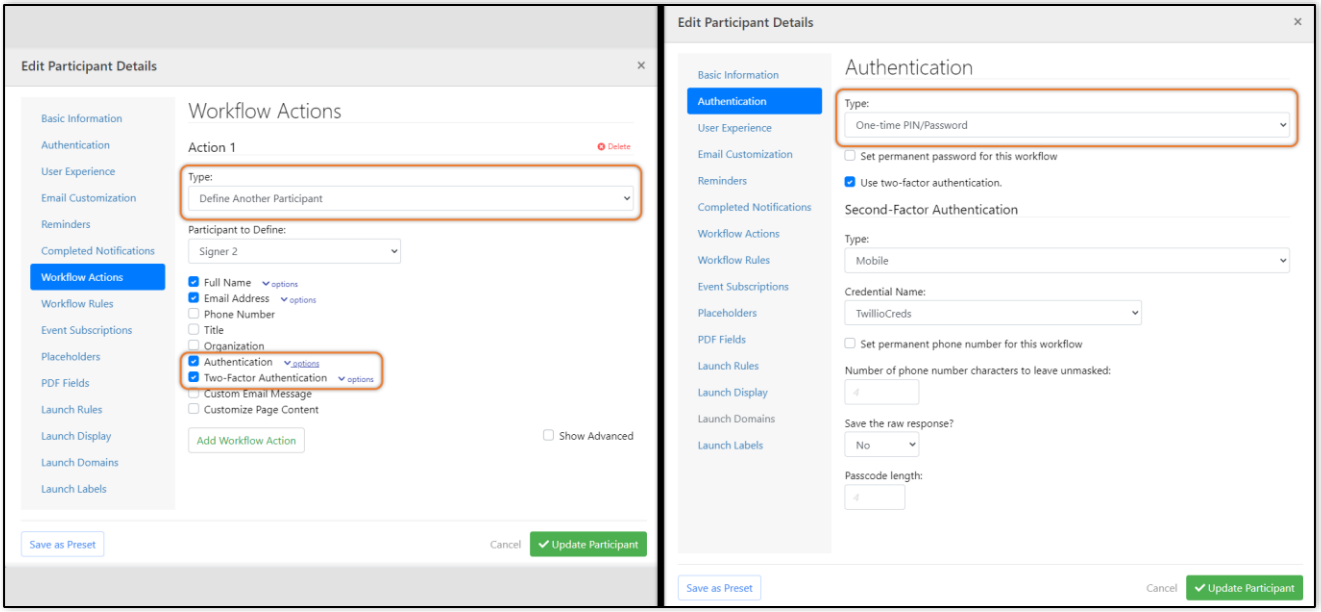
```
--c-button-secondary-disabled-border: transparent;
--c-button-secondary-disabled-text: rgba(245, 245, 246, 0.75);
--c-input-default-base-text: #262F3F;
--c-input-default-base-border: #D9DBDD;
--c-input-default-base-background: #ffffff;
--c-input-default-focus-border: rgba(0, 88, 251, 0.5);
--c-input-default-focus-shadow: rgba(0, 88, 251, 0.3);
--c-input-error-base-text: #BF3D66;
--c-input-error-base-border: rgba(255, 79, 127, 0.5);
--c-input-error-base-shadow: rgba(255, 79, 127, 0.3);
--c-input-error-focus-border: #FF4F7F;
--c-hint-default: rgba(38, 47, 63, 0.55);
--c-hint-success: #00B4A8;
--c-hint-error: #BF3D66;
--c-hint-required: #BF3D66;
--c-line-default: rgba(217, 219, 221, 0.6);
```

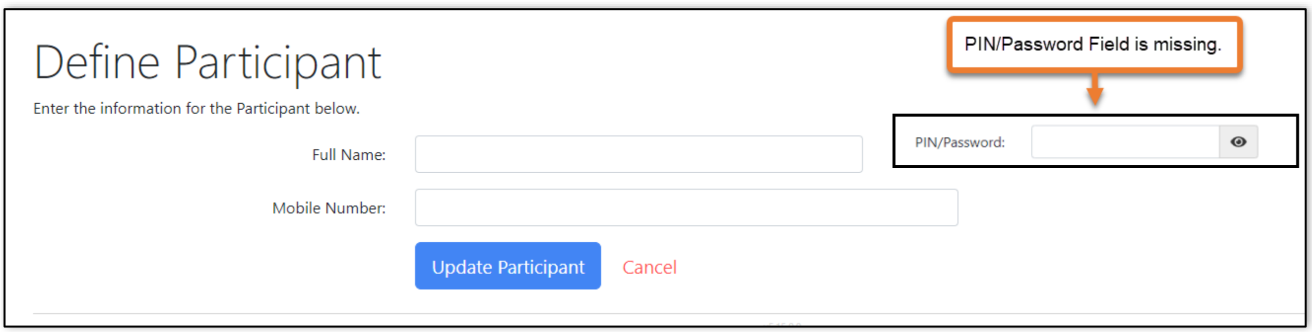
v5.15.2 Release *Production Release Date: 8/11/2022*

Bug Fixes

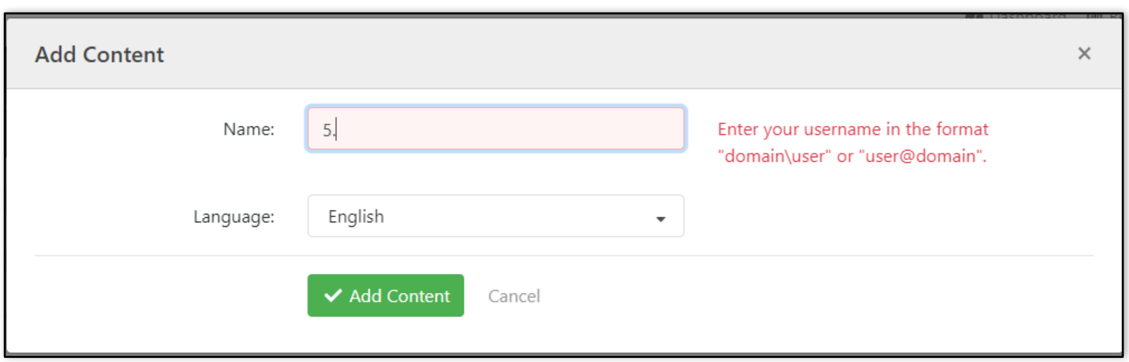
Release Notes

[PEP-4982] - Fixed issue where when defining a participant, the Pin/Password field would not display for Authentication. Please see the images below of the Define Participant Workflow Action and Participant Authentication settings referenced and an example of the Define Participant page.



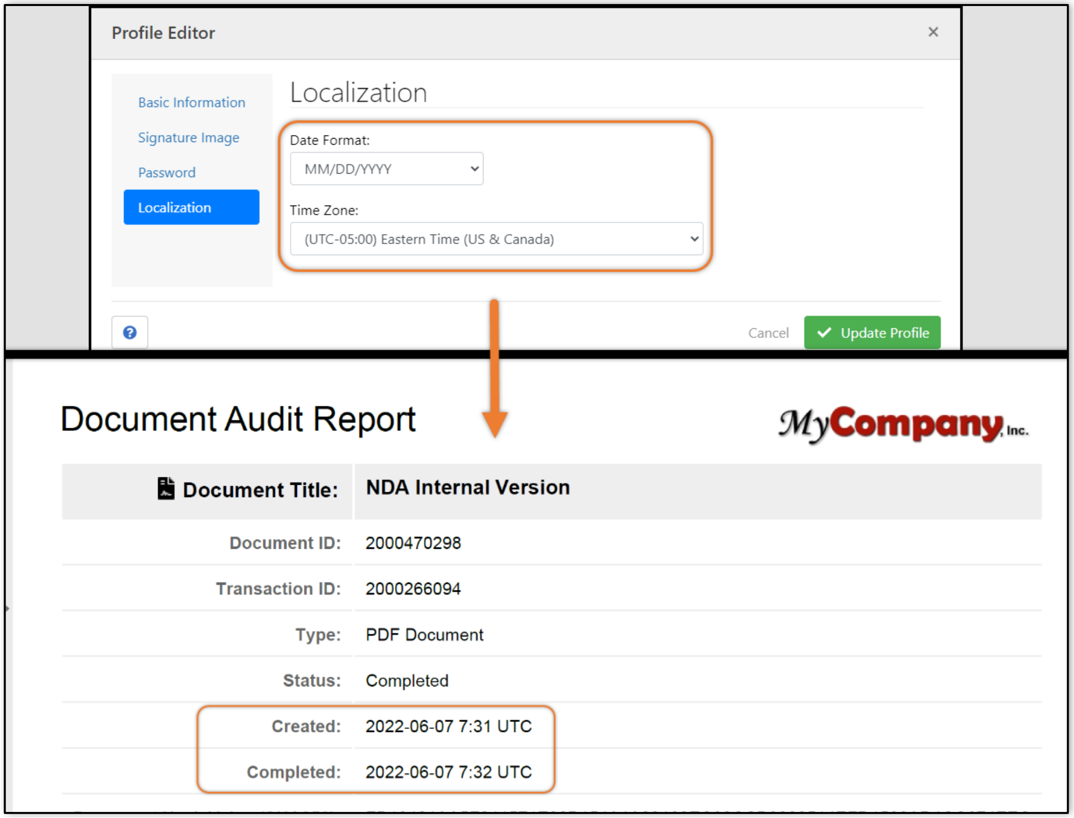


[PEP-4981] - Fixed issue where when adding and naming a new content, notification, or brand set, if invalid characters were used in the name, it would show an incorrect error message. Please reference the image below for an example of the incorrect error message.

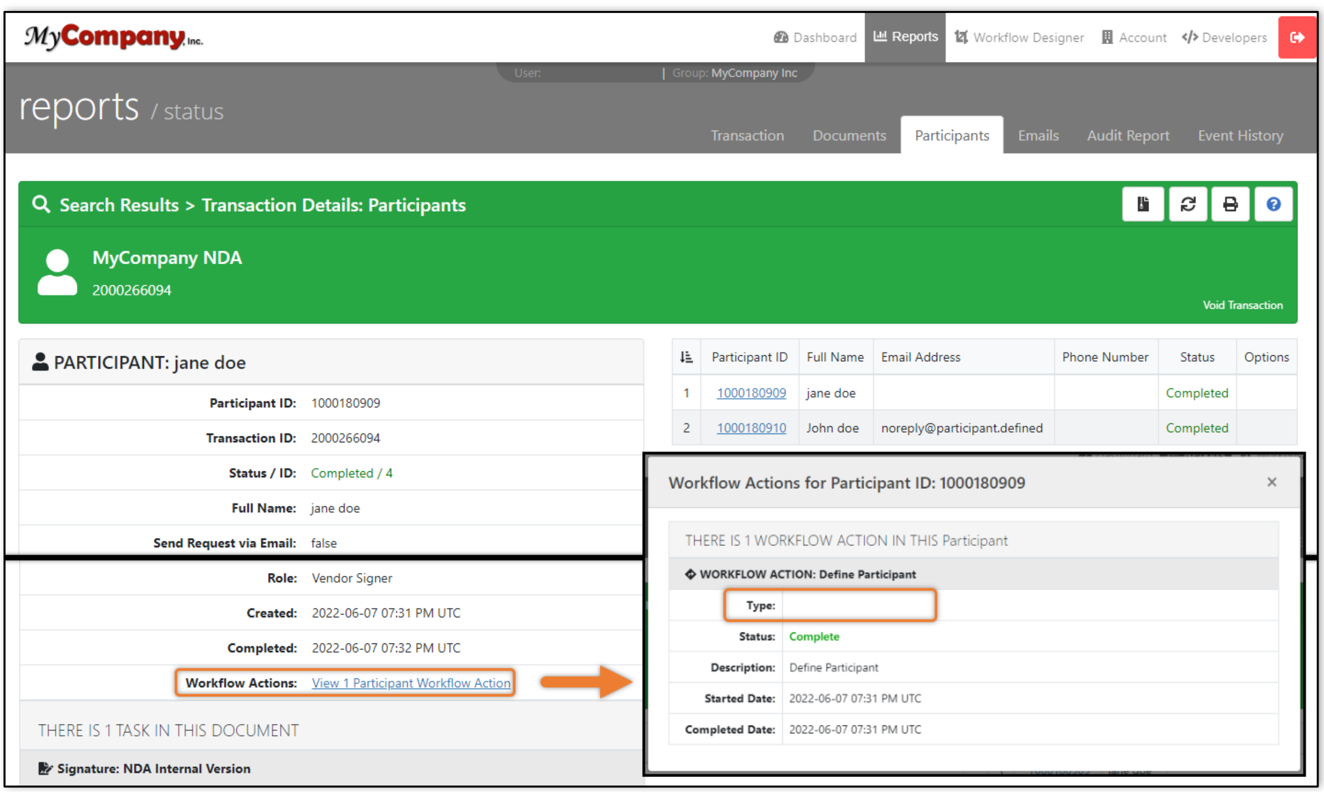


[PEP-4970] - Fixed issue where the time zone set in a user's profile was not being used in the Audit Report when it was downloaded with the Evidence Package zip file. Please see the image below of the Localization settings in a user's profile and an example of an audit report with the incorrect time zone.

Release Notes



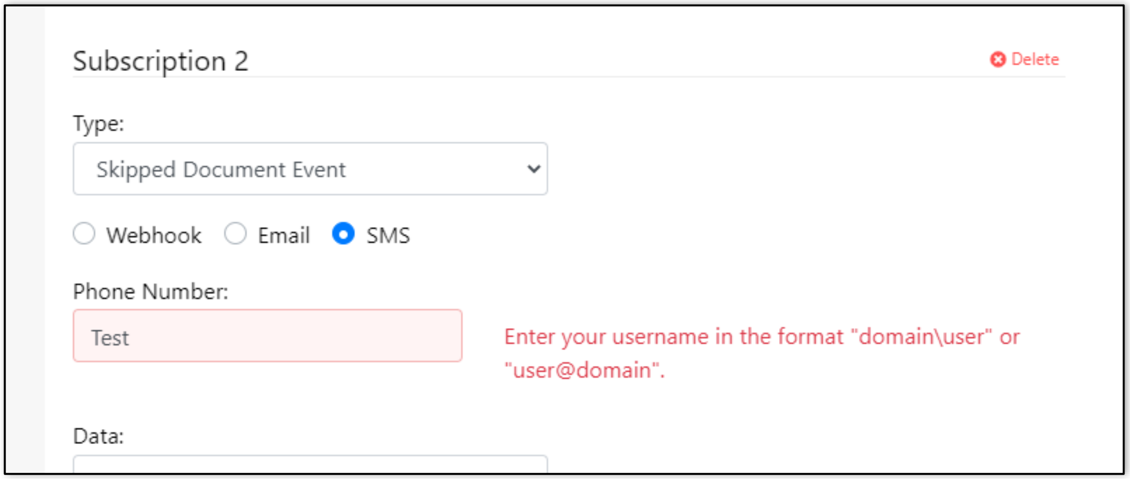
[PEP-4969] - Fixed issue where the Define Participant Workflow Action Type wasn't displaying in the Transaction Status Reports. Please see the image below of where the Workflow Actions in the Transaction Status is located and an example of the Workflow Action missing the Workflow Action Type.



[PEP-4949] - Fixed issue where the signing UI would render slowly for SMS singing links. Increased page load performance when using SMS links, so that they load/redirect faster.

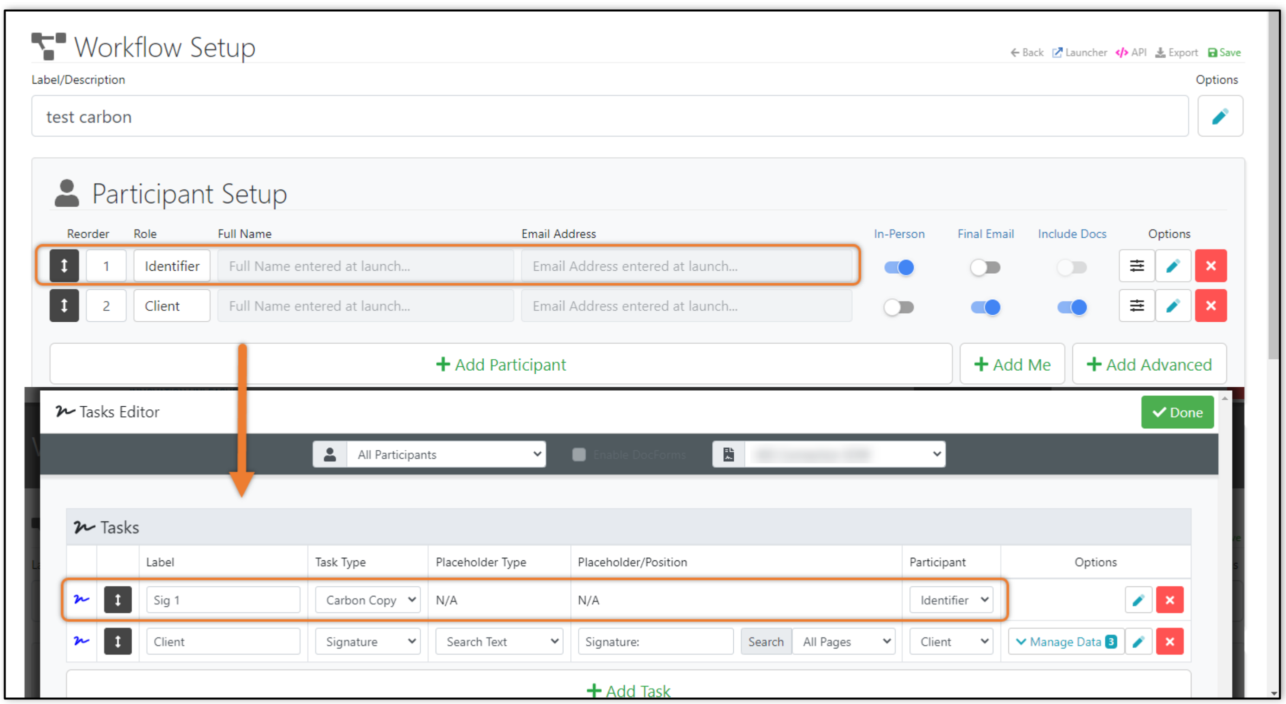
Release Notes

[PEP-4948] - Fixed issue where when adding an event subscription, the error message for an invalid phone number was incorrect. Please reference the image below for an example of the incorrect error message.



[PEP-4927] - Fixed issue where deprecated database references, Pronto_ProcessTemplates database, were still in the Installation guide. The deprecated database references were removed. Note: The v4 control panel database references were previously removed, but the references in the database were still present.

[PEP-3373] - Fixed issue where a Transaction containing a participant with a carbon copy task, on an uploaded document, would get stuck and the second participant would not receive an email with the signature link. Please see the image below for more details.



v5.15.1.1 Release *Production Release Date: 7/14/2022*

Bug Fixes

[PEP-5084] - Fixed issue where Event Subscription Webhooks would retry only for a maximum of three times regardless of the retry-limit set.