

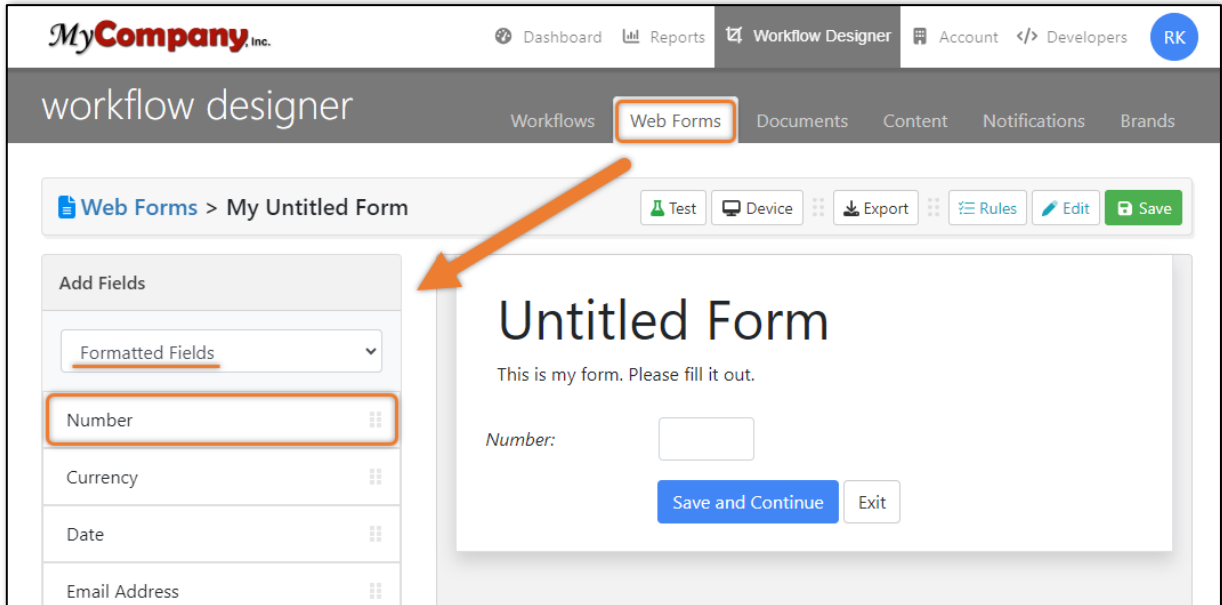
Release Notes

v5.18.13.1 Release

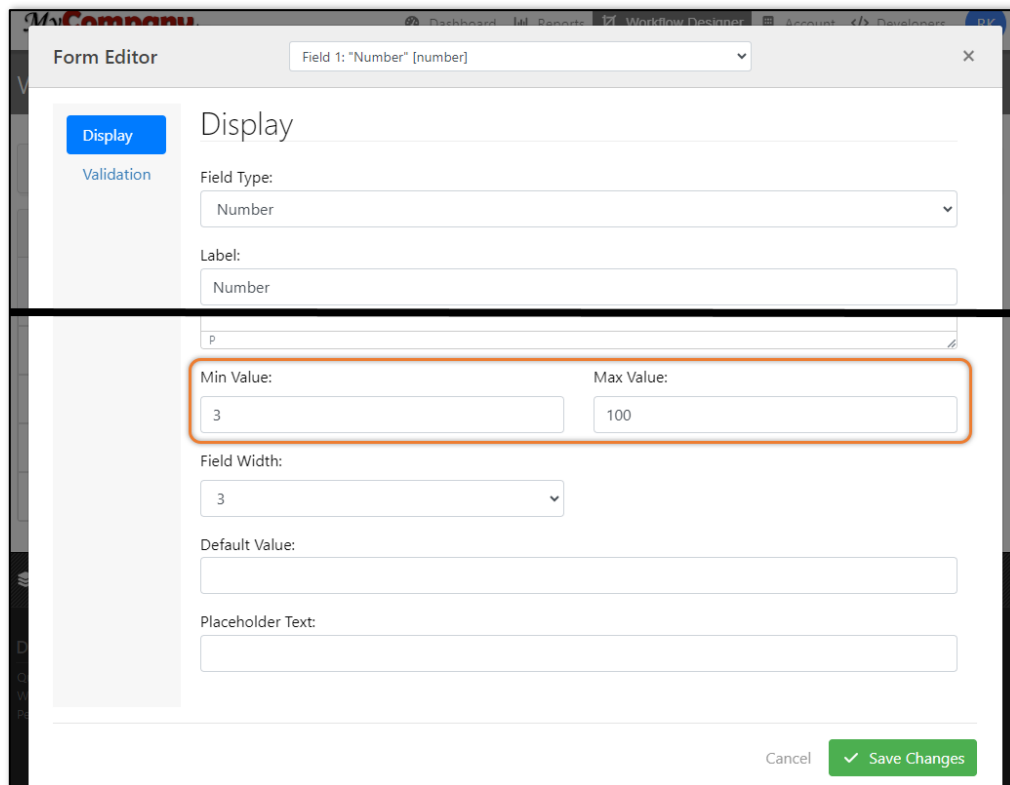
Release Date: 8/30/2024

Bug Fixes

[PEP-7361] - Fixed issue where Web Form number fields, with a regex and min/max values, would not have all validation work as expected. Number fields do not support regex validation, and we instead use browser native number input to limit values to numbers. Please see the images below for the referenced settings.



The screenshot shows the 'MyCompany' workflow designer interface. The 'Web Forms' tab is selected, and an 'Untitled Form' is being edited. The 'Add Fields' sidebar on the left lists 'Formatted Fields', 'Number', 'Currency', 'Date', and 'Email Address'. The 'Number' field is highlighted with an orange box. An orange arrow points from this box to the 'Number' field in the form preview. The form preview shows a label 'Number:' followed by a text input field. Below the input field are 'Save and Continue' and 'Exit' buttons. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'.



The screenshot shows the 'Form Editor' dialog box for a 'Number' field. The 'Display' tab is selected. The 'Field Type' is set to 'Number'. The 'Label' is 'Number'. The 'Min Value' is set to '3' and the 'Max Value' is set to '100'. The 'Field Width' is set to '3'. The 'Default Value' and 'Placeholder Text' fields are empty. The 'Save Changes' button is highlighted with an orange box. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'.

v5.18.13 Release

Release Date: 8/15/2024

Bug Fixes

[PEP-8344] - Fixed issue where when utilizing the *Allow Multiple Document Uploads* feature with the *Document Upload Match RegEx* option, documents that matched successfully would not be shown with an Upload Status. Please see the images below for the referenced settings and an example.

Release Notes

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Launch Rules

☒ Publish this Workflow as launchable template.

☒ Allow users in this Group to launch this Workflow.

☐ Allow users in all Sub Groups in this account to launch this Workflow.

☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.

☐ Allow this Workflow to be launched publicly with no authentication required.

☐ Allow the launch form to use the full page width (default is centered).

☐ Allow the Description to be edited at the time of launch.

☒ Allow Multiple Document Uploads

☐ Enable Bulk Launching

Edit Document Details

Basic Information

Workflow Rules

User Experience

Event Subscriptions

Metadata

Launch Rules

Replace Document

Launch Rules

☒ Require unique document upload at launch (do not use template on file).

☐ This Document is optional at launch.

☐ Allow the launcher to customize the document title.

☐ Allow the launcher to fill out document fields as "Launcher" Role.

Document Upload Match RegEx:
NDA

Save as Preset

Cancel

Update Document

MyCompany inc.

Dashboard

Reports

Workflow Designer

Account

Developers

RK

Workflows > MyCompany PO: 22062

Launch

Test

Export

Edit

Save

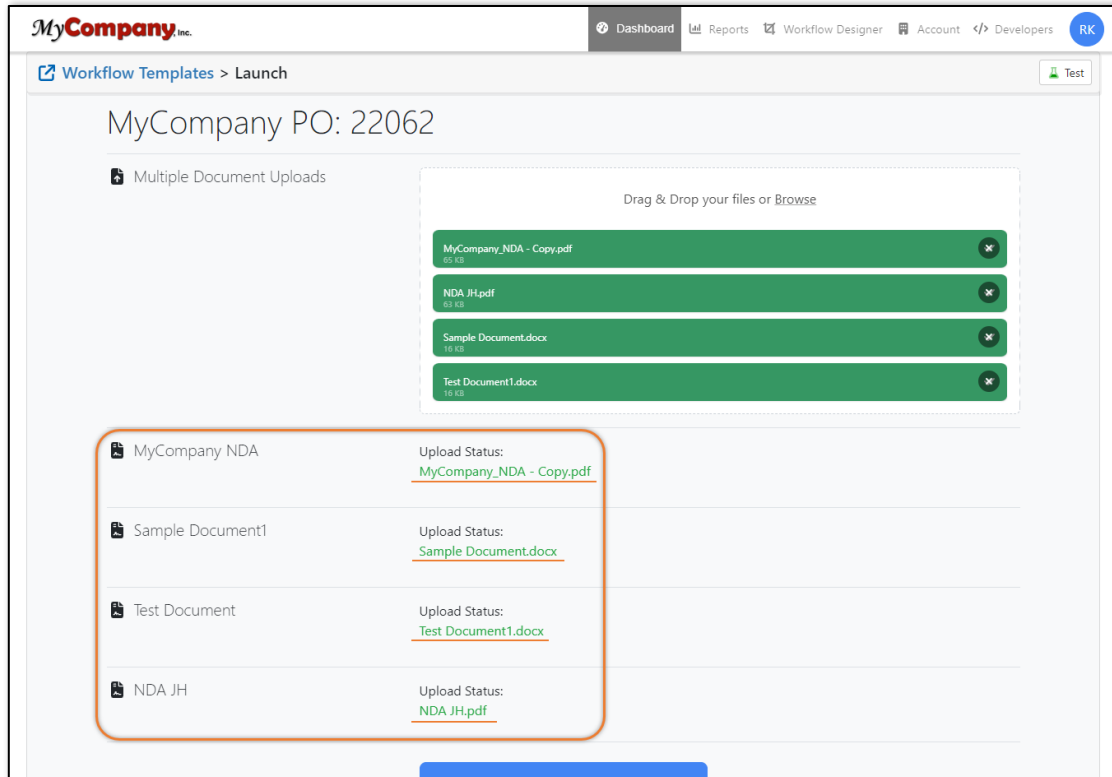
Document Setup

Add Documents

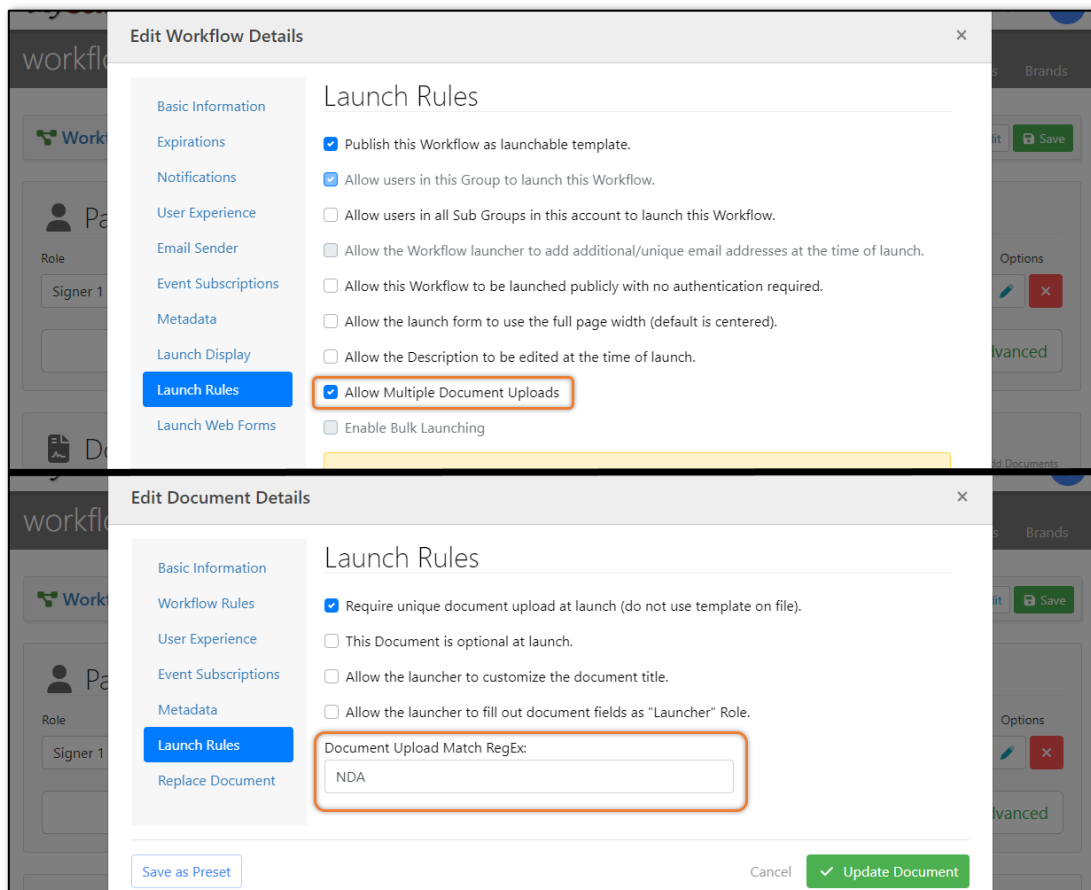
Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
1	MyCompany NDA	MyCompany_NDA.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="button" value="X"/>
2	Sample Document1	Sample Document1.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="button" value="X"/>
3	Test Document	Test Document.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="button" value="X"/>
4	NDA JH	NDA JH.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="button" value="X"/>

Add Document(s)

Release Notes



[PEP-8222] - Fixed issue where when utilizing the *Allow Multiple Document Uploads* feature with the *Document Upload Match RegEx* option, Zip files that contained more than one document that matched would not show the details of the multiple matches as it should. Please see the images below for the referenced settings.



Release Notes

Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
1	MyCompany NDA	MyCompany_NDA.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document	✖
2	Sample Document1	Sample Document1.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document	✖
3	Test Document	Test Document.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document	✖
4	NDA JH	NDA JH.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document	✖

✓ Add Document(s)

[PEP-8195] - Fixed issue where if a Launcher Participant exited and did not submit a required Web Form, the Transaction would not correctly cancel. Please see the images below for the referenced settings and an example.

Edit Workflow Details

Basic Information
Expirations
Notifications
User Experience
Email Sender
Event Subscriptions
Metadata
Launch Display
Launch Rules
Launch Web Forms

Launch Web Forms

☒ Publish this Workflow as launchable template.

Web Forms added here will require the launcher of the Workflow to fill them out (in the order listed below) prior to emails being sent out to any Participants. **Note: This feature is only available for non-public (authenticated) launch templates.**

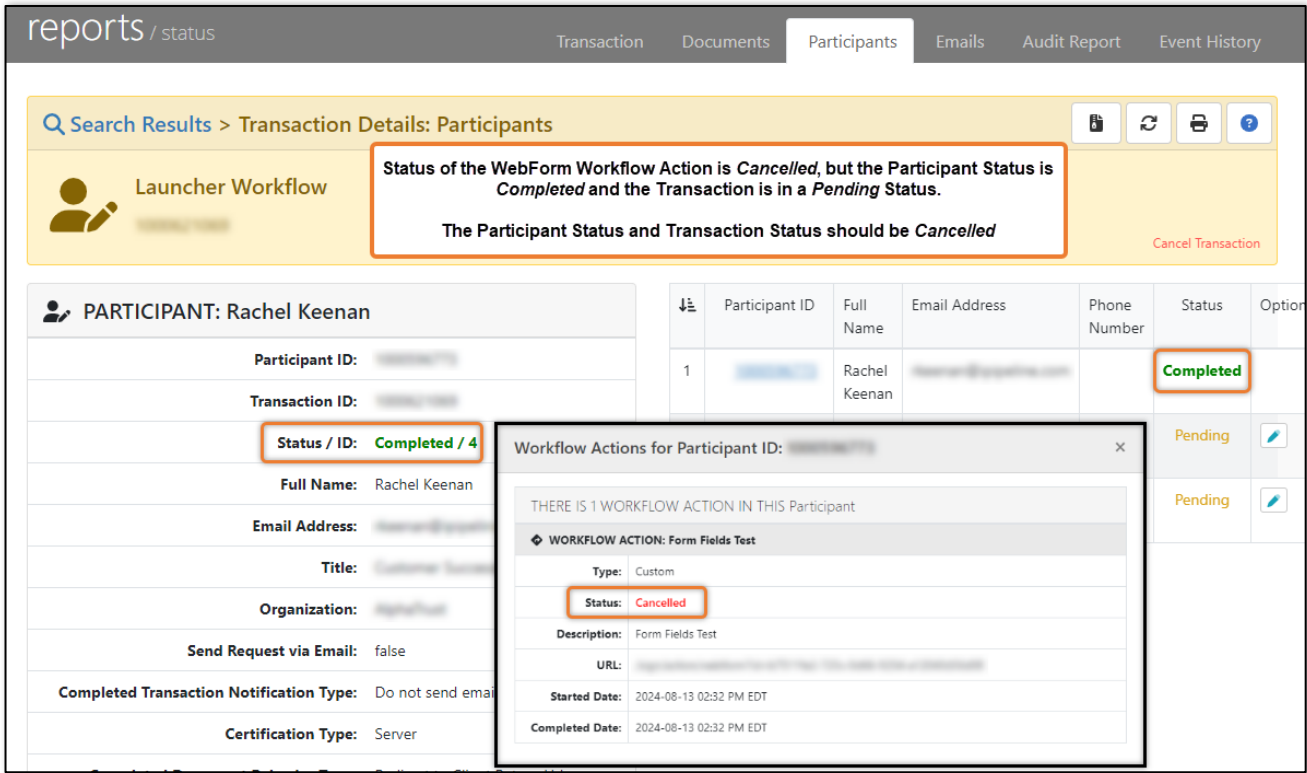
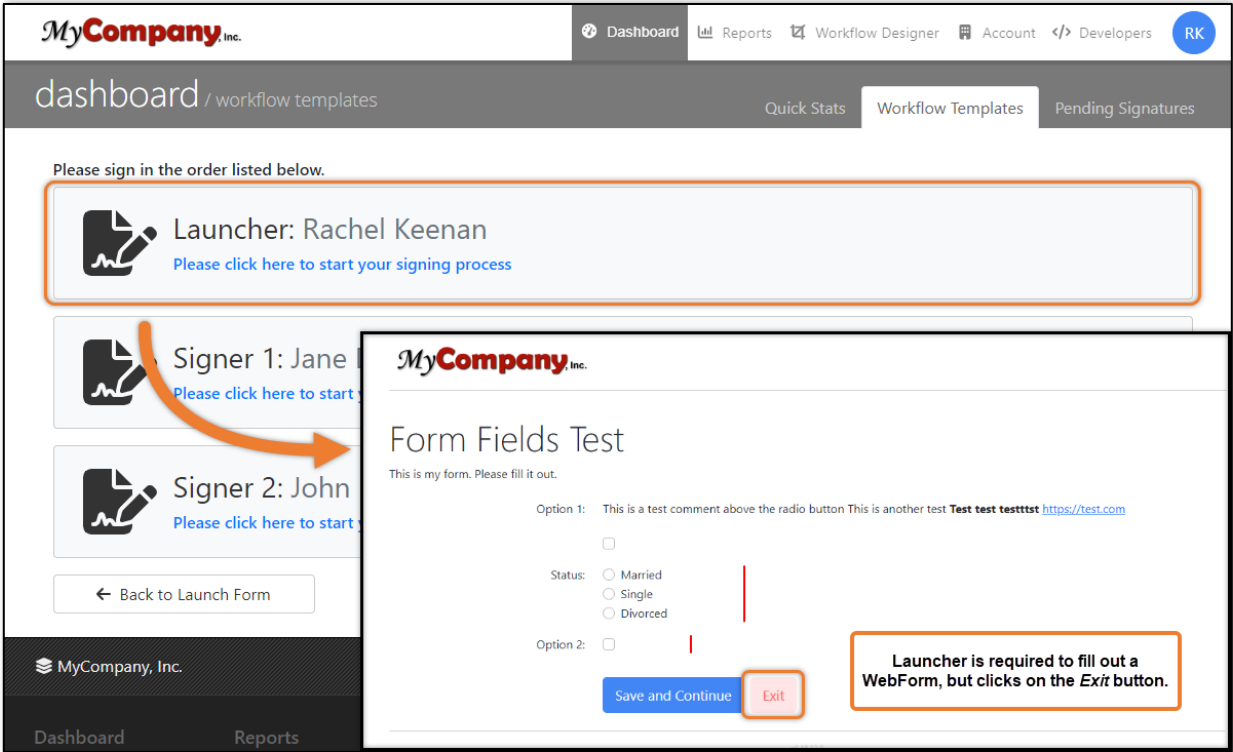
Web Form 1 [Delete](#)

Web Form:
Form Fields Test

[Add Web Form](#)

[Save as Preset](#) [Cancel](#) [Update Workflow](#)

Release Notes



v5.18.12 Release

Release Date: 8/1/2024

Bug Fixes

[PEP-8176] - Fixed issue where reassigned Participants did not have the signer location task properly reassigned. Please see the image below for the referenced settings.

Release Notes

Edit Participant Details

Workflow Rules

Custom Exit Url:

Custom Session Timeout Url:

☒ Allow participant to reassign tasks to a different person if necessary.

Verify/Query for:
NOTE: these may be automatically queried for if a participant's tasks requires this data.

☐ Full Name
☐ Initials
☐ Email Address
☐ Title
☐ Organization
☐ Signing Location

Document Access Window:
 minutes after completed

Document Access Limit:
 times after completed

[Save as Preset](#) [Cancel](#) [Update Participant](#)

[PEP-8174] - Fixed issue where regex validation would not work for the Number field in Web Forms. Please see the image below for the referenced settings.

workflow designer / web forms

Web Forms > My Untitled Form

Test Device Export Rules Edit Save

Add Fields

Formatted Fields

Number

Currency

Date

Email Address

Phone Number

Social Security Number

Form Editor Field 1: "Number" [number]

Validation

Regex Validation: (reset)

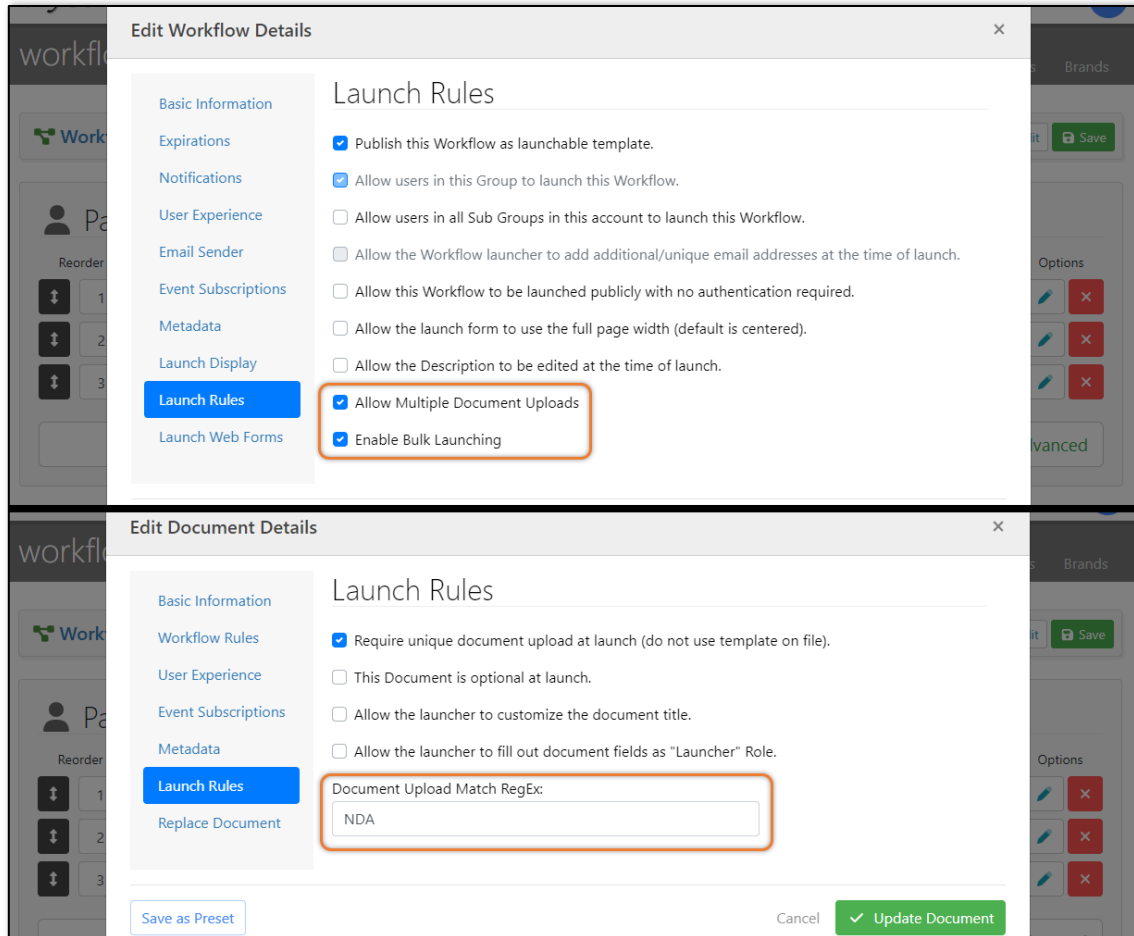
Regex Error Message: (reset)

☐ Required

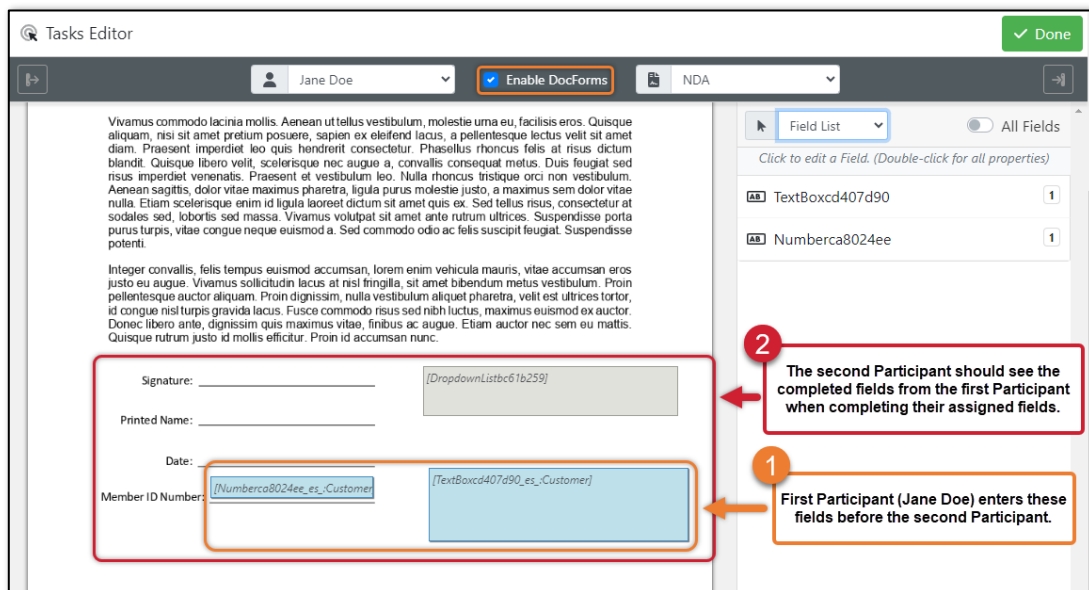
[Cancel](#) [Save Changes](#)

[PEP-8163] - Fixed issue where, when utilizing Public Launch in combination with the Bulk Document Upload feature, if multiple documents matched conditions for a single document upload it would apply the match to both documents when it should only match for the first document. Please see the image below for the referenced settings.

Release Notes

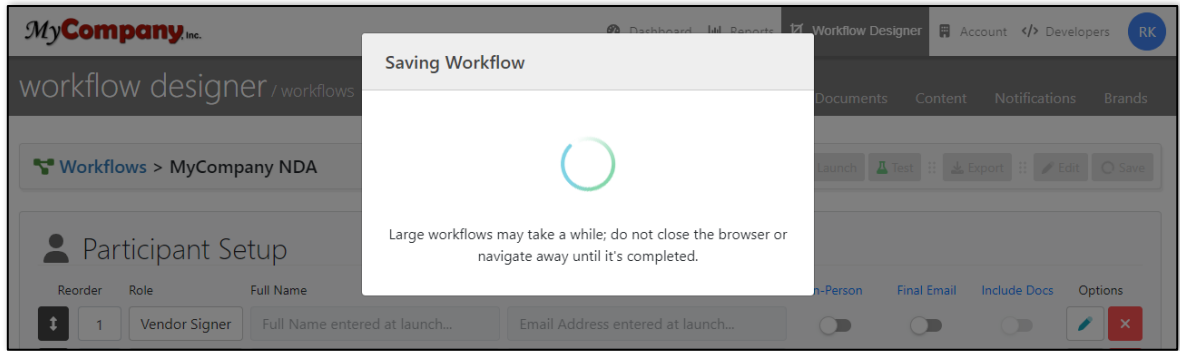


[PEP-8133] - Fixed issue where a first Participants' participant-specific DocForm values are not mapped or shown on a DocForm when a second Participant enters to complete the same DocForm. Please see the image below for the referenced settings.

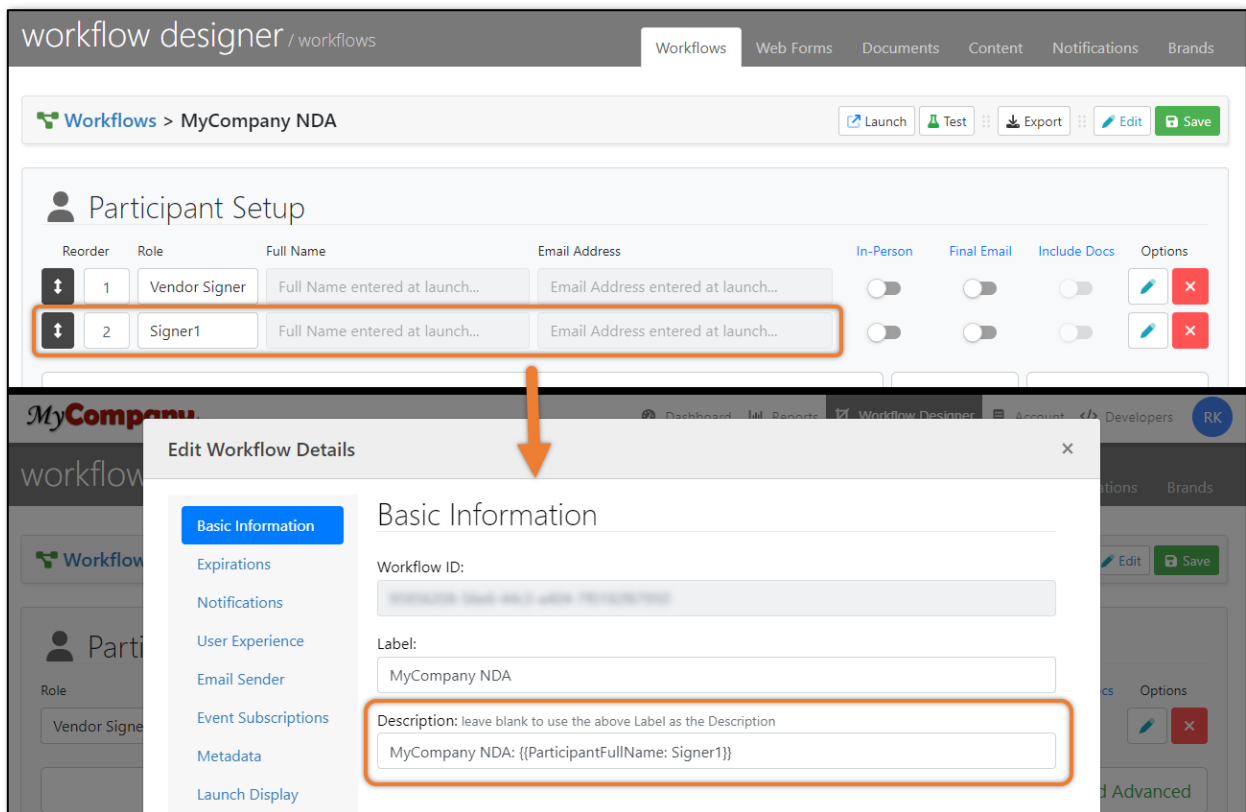


[PEP-8040] - Fixed issue where when updating a Workflow in the Control Panel, a user could exit the screen while changes are being saved. The changes would not be saved and the Workflow would end up in an errored state that could not be recovered from. Updated UI to include full screen saving modal to ensure changes to a Workflow are saved properly. Please see the image below for an example for the new saving modal.

Release Notes



[PEP-7896] - Fixed issue where transaction description placeholders accepted participant index but not participant role. Added role to placeholder participant identifier for transaction description. New placeholders include: ParticipantFirstName, ParticipantLastName, ParticipantFullName, ParticipantTitle, ParticipantOrganization, and ParticipantEmailAddress. Please see the image below for the referenced settings and an example.



[PEP-7538] - Fixed issue where a daylight savings name was being used for a time zone instead of the standard name causing problems when trying to identify the correct time zone.

[PEP-7297] - Fixed issue where task-specific content could not be specified for *Upload Additional Documents* Workflow Actions. Added a custom content option for *Upload Additional Documents* Workflow Action. Please see the image below for the referenced settings.

Release Notes

Edit Task Details

Basic Information

User Experience

Style

Placement

Workflow Actions

Event Subscriptions

Launch

Workflow Actions

Action 1

⬇️ Delete

Type:

Upload Additional Documents

Label:

Description visible to Participants

Configuration:

Action Data

Content:

EditInsertFormatTableTools

B*I*

☰☰

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P

☐ Action is NOT required again after the Participant completes it once

Add Workflow Action

☒ Show Advanced

Cancel

✓ Update Task

[PEP-6984] - Fixed issue where Participants were not able to skip optional documents when the *Prompt Participants for Cancellation Reason* setting was enabled. Please see the image below for the referenced settings.

Basic Information

Workflow Rules

User Experience

Event Subscriptions

Metadata

Launch Rules

Replace Document

Workflow Rules

☒ Is optional (document can be skipped by Participants during signing)

☐ Do not allow forms fields to be flattened

☐ Allow as email attachment

☐ Include Audit Report With Completed Documents

Document Retention in Days:

Purge document in

N/A

 days after status is in Completed status.

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

User Experience

Notification Set:

None (Use Default Notification Set)

Notification Language:

None (Use Default Language)

Public Launch Brand:

None (Use Default Branding)

Default Time Zone:

-- Use Default Group Time Zone --

☒ Prompt Participants for Cancellation Reason

Save as Preset

Cancel

Update Workflow

Release Notes

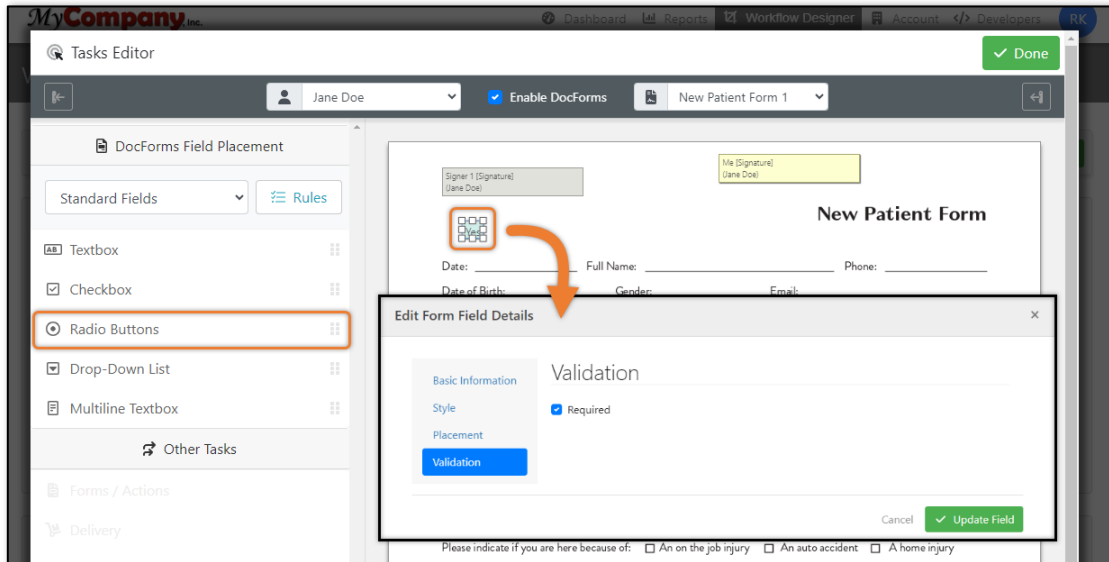
v5.18.11.2 Release

Release Date: 7/16/2024

Bug Fixes

[PEP-8229] - Fixed issue where access order checks on Participants would cause emails to not send out as expected.

[PEP-8119] - Fixed issue where a required attribute on a radio button was not properly applied to a PDF upon saving within the Control Panel. Please see the image below for the settings referenced and an example.

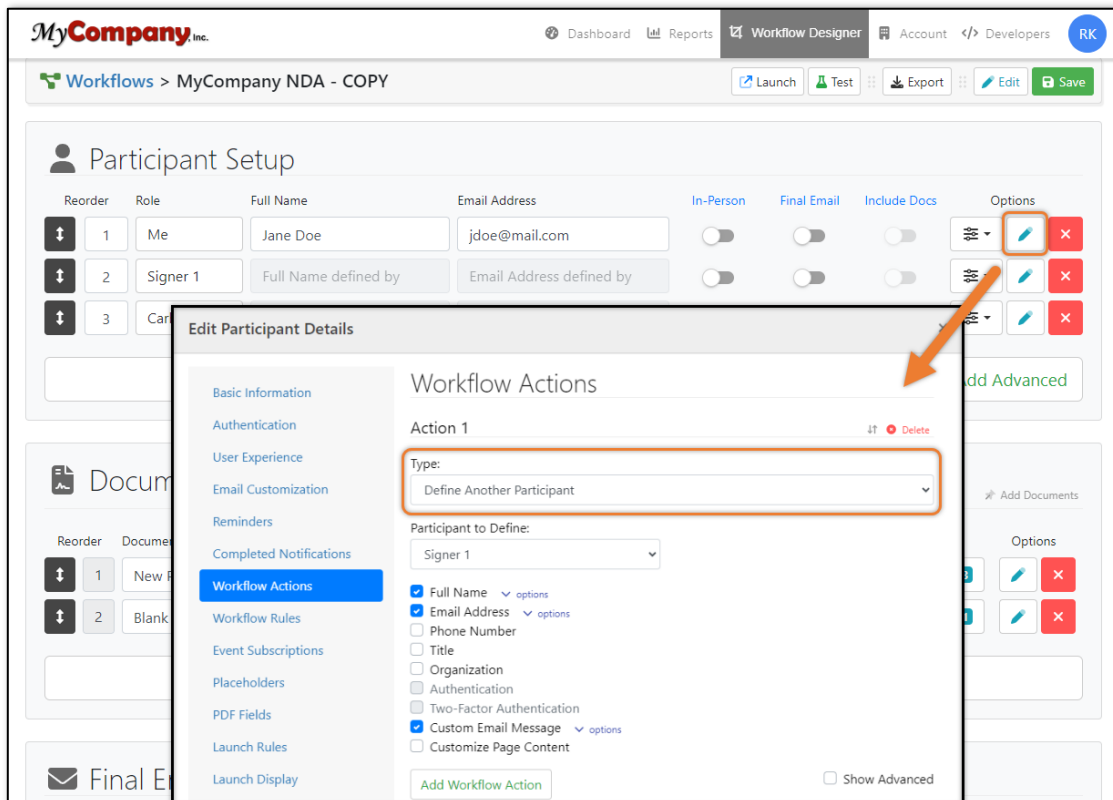


v5.18.11.1 Release

Release Date: 7/12/2024

Bug Fixes

[PEP-8196] - Fixed issue where fields would not appear on screen when a participant was assigned a Define Another Participant task. Please see the referenced settings in the image below.



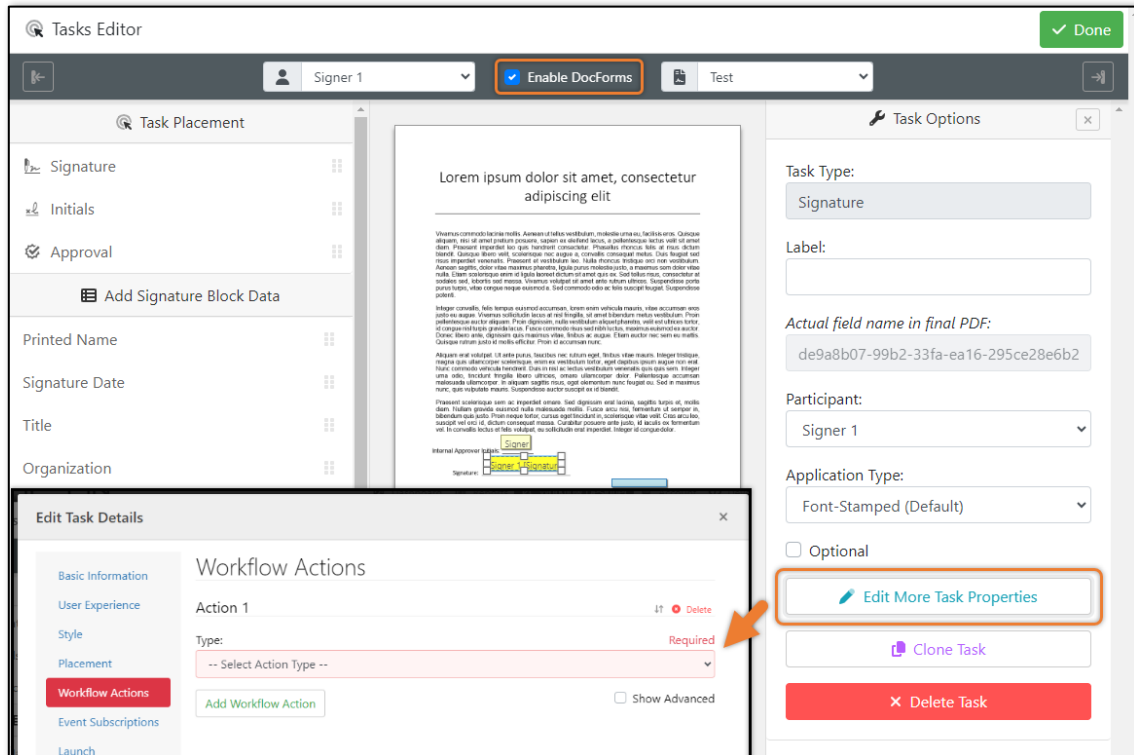
Release Notes

v5.18.11 Release

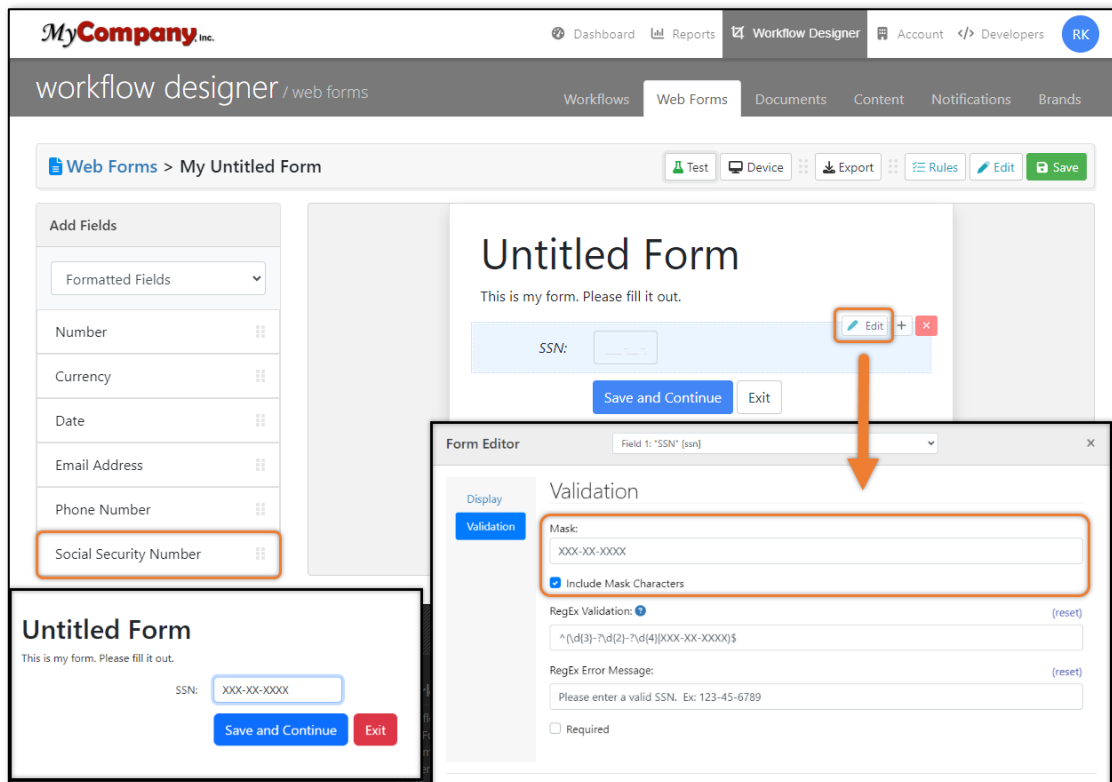
Release Date: 6/27/2024

Bug Fixes

[PEP-8156] - Fixed issue where Workflow Actions would be incorrectly skipped when DocForms was enabled. Please see the image below for the settings referenced.

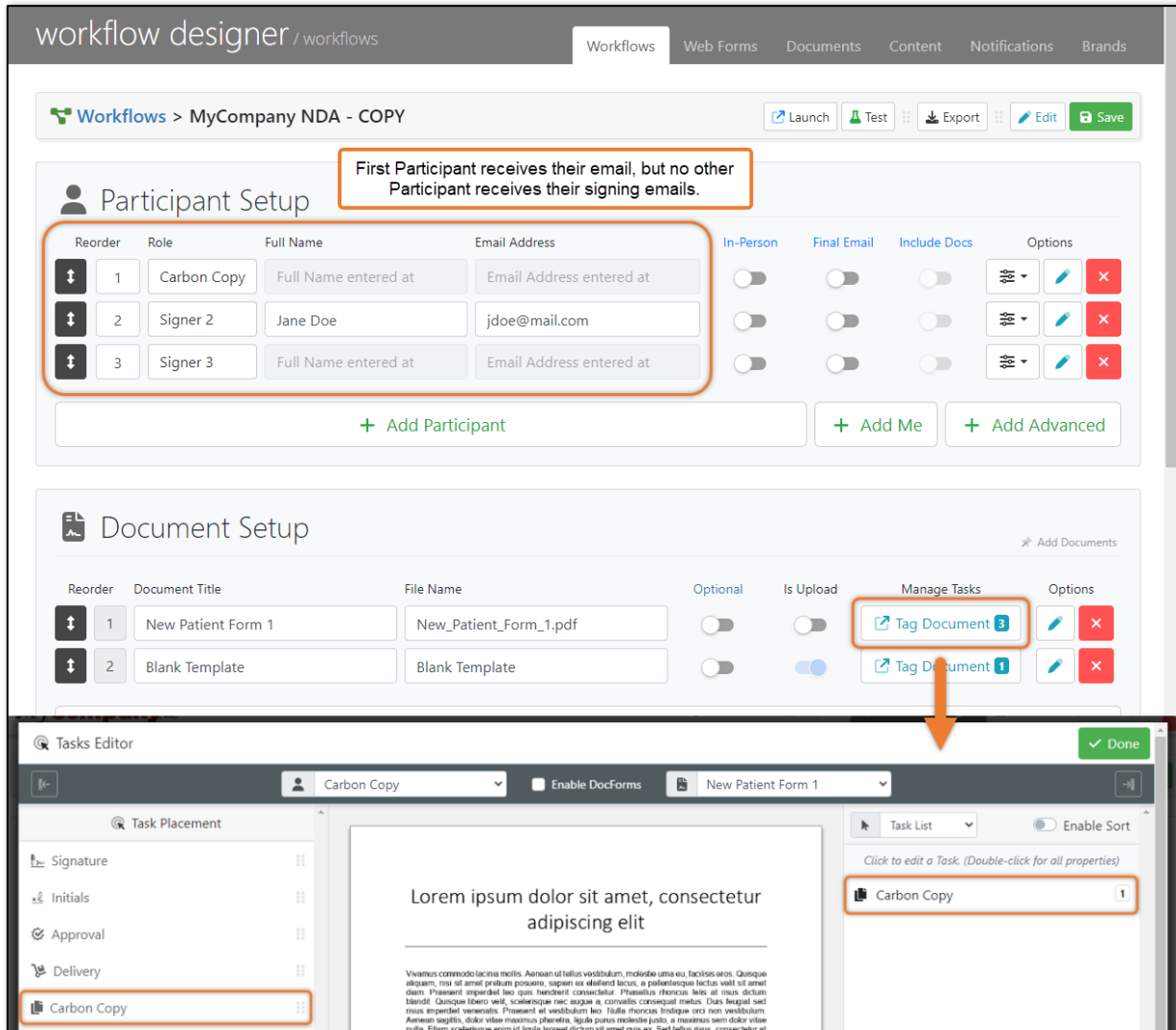


[PEP-8148] - Fixed issue where the Social Security Number Field Mask would not work as expected and would fill in the spaces after the Participant entered the first number. Please see the image below for the referenced settings and an example.



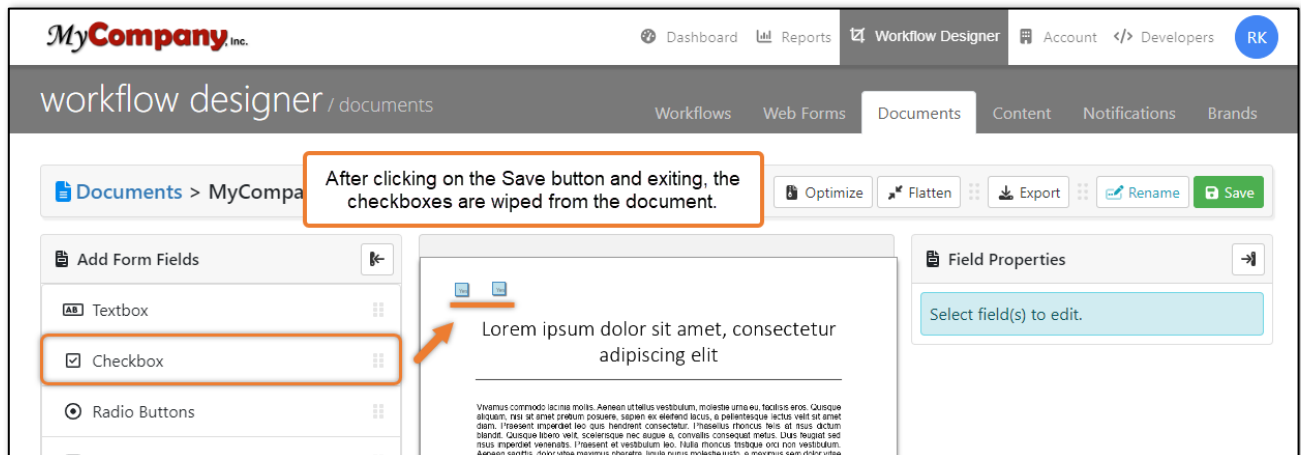
Release Notes

[PEP-8143] - Fixed issue where Participant emails fail to send if they are after a Carbon Copy Participant. Please see the image below for the referenced settings and an example.



[PEP-8141] - Fixed issue where API calls would allow for double @ symbols in email addresses. Added validation check for double @ symbols in email addresses.

[PEP-8137] - Fixed issue where checkboxes in the Documents editor would be wiped after adding more than one. Please see the image below for more information.



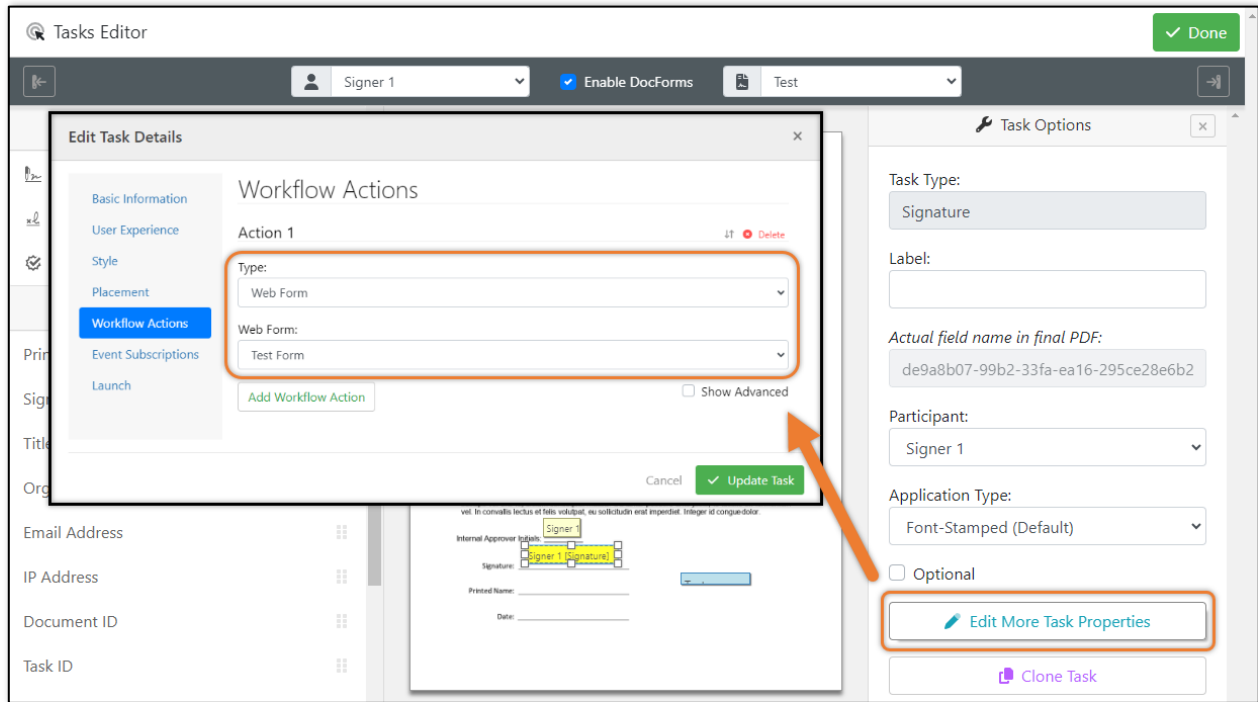
Release Notes

v5.18.10 Release

Release Date: 6/14/2024

Bug Fixes

[PEP-8123] - Fixed issue where Web Forms, that were Workflow Actions on Document tasks, would be triggered out of order. The Participant would see all Web Forms at once instead of with each correlated task.

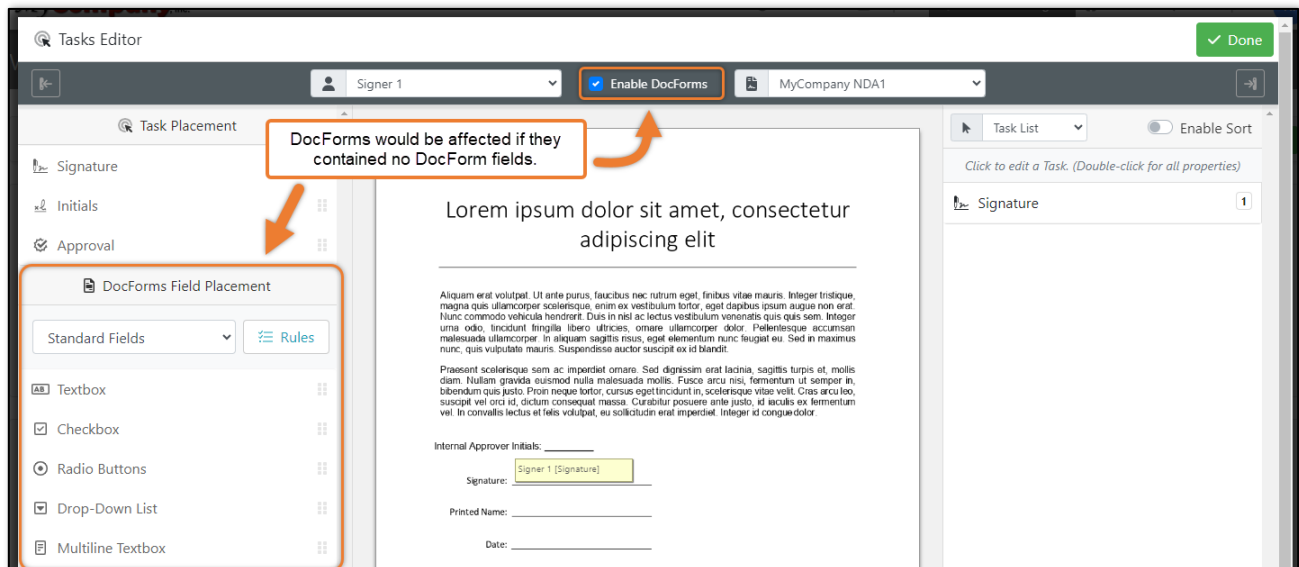


v5.18.9 Release

Release Date: 6/7/2024

Bug Fixes

[PEP-8110] - Fixed issue where a Participant could not navigate to the signing page if the Workflow used DocForms that contained no DocForm fields. Please see the image below for more details and an example.



v5.18.8 Release

Release Date: 5/23/2024

Bug Fixes

[PEP-8048] - Fixed issue where Task Workflow Actions would be skipped in certain scenario(s). Please see the image below for an example and the referenced settings and steps to add a Workflow Action to a Task.

Release Notes

The screenshot displays the 'Tasks Editor' interface. On the left, the 'Task Placement' sidebar (1) lists 'Signature', 'Initials', and 'Approval'. The central area shows a 'New Patient Form' with a signature field. On the right, the 'Task Options' panel (2) includes 'Task Type' (Signature), 'Label', 'Participant' (Jane Doe), 'Application Type' (Font-Stamped), and an 'Optional' checkbox. A red box (3) highlights the 'Edit More Task Properties' button. An 'Edit Task Details' modal (4) is open, showing 'Workflow Actions' for 'Action 1' with 'Type' set to 'Web Form' and 'Web Form' set to 'My Untitled Form'. The modal includes 'Add Workflow Action', 'Show Advanced', 'Cancel', and 'Update Task' buttons.

[PEP-8038] - Fixed issue where workflows that could be launched publicly could not upload multi-file zip files. Please see the images below for the referenced settings.

The screenshot shows the 'Edit Workflow Details' modal, specifically the 'Launch Rules' tab. The left sidebar lists various settings categories, with 'Launch Rules' selected. The main area contains several checkboxes: 'Publish this Workflow as launchable template.' (checked), 'Allow users in this Group to launch this Workflow.' (checked), 'Allow users in all Sub Groups in this account to launch this Workflow.' (unchecked), 'Allow the Workflow launcher to add additional/unique email addresses at the time of launch.' (unchecked), 'Allow this Workflow to be launched publicly with no authentication required.' (checked and highlighted with a red box), 'Allow the launch form to use the full page width (default is centered).' (unchecked), 'Allow the Description to be edited at the time of launch.' (unchecked), 'Allow Multiple Document Uploads' (checked and highlighted with a red box), and 'Enable Bulk Launching' (unchecked). A yellow box contains a warning: 'Bulk Launching is disabled if any of the following options are being used: The Workflow is a Public Launch type, There are in-person participants, The Launcher needs to fill out one or more WebForm at launch, The Launcher needs to fill out one or more DocForms at launch'. At the bottom are 'Save as Preset', 'Cancel', and 'Update Workflow' buttons.

[PEP-8034] - Fixed issue where emails for Carbon Copy Participants would not be sent. Please see the image below for the referenced settings.

Release Notes



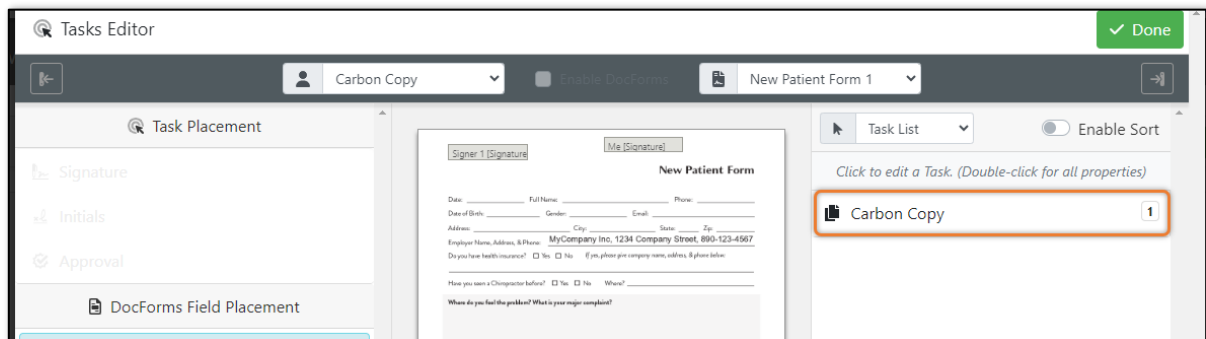
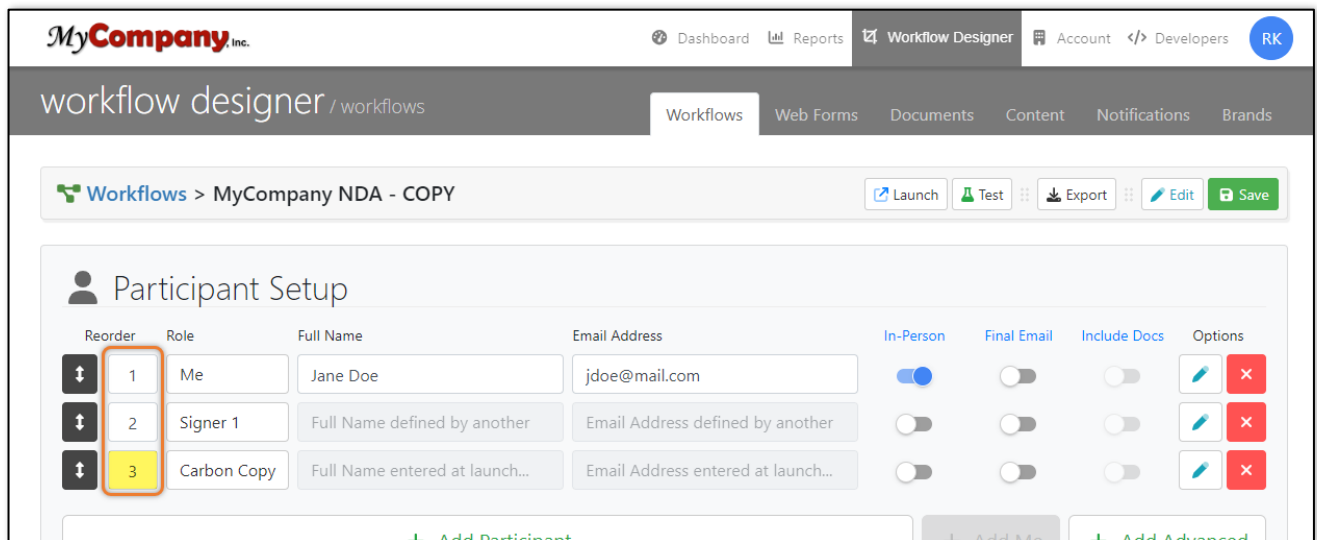
v5.18.7 Release

Release Date: 5/14/2024

Bug Fixes

[PEP-7991] - Fixed issue where participant reminder notifications were not being sent out. This was seen in versions 5.18.0 through 5.18.6.

[PEP-7977] - Fixed issue where Carbon Copy tasks, and related emails, would be completed prematurely and not according to the access order. Please see the images below for an example and more information.



Release Notes

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers RK

reports Transaction Documents **Participants** Emails Audit Report Event History

Search Results > Transaction Details: Participants

MyCompany NDA - COPY 1000611000

Carbon Copy participant and task should not be in a *Completed* status until the second participant signs.

Cancel Transaction

	Participant ID	Full Name	Email Address	Phone Number	Status	Options
1	1000584224	Jane Doe	jdoe@mail.com		Completed	
2	1000584225	John Smith	jsmith@mail.com		Pending	
3	1000584226	Karen Johnson	kjohnson@mail.com		Completed	

[PEP-7974] - Fixed issue where large document uploads did not list the matched document name. Please see the images below for the referenced settings.

Edit Workflow Details

Basic Information Expirations Notifications User Experience Email Sender Event Subscriptions Metadata Launch Display **Launch Rules** Launch Web Forms

Launch Rules

- ☒ Publish this Workflow as launchable template.
- ☒ Allow users in this Group to launch this Workflow.
- ☐ Allow users in all Sub Groups in this account to launch this Workflow.
- ☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.
- ☐ Allow this Workflow to be launched publicly with no authentication required.
- ☐ Allow the launch form to use the full page width (default is centered).
- ☐ Allow the Description to be edited at the time of launch.
- ☒ Allow Multiple Document Uploads
- ☐ Enable Bulk Launching

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers RK

Workflows > MyCompany PO: 22062

Launch Test Export Edit Save

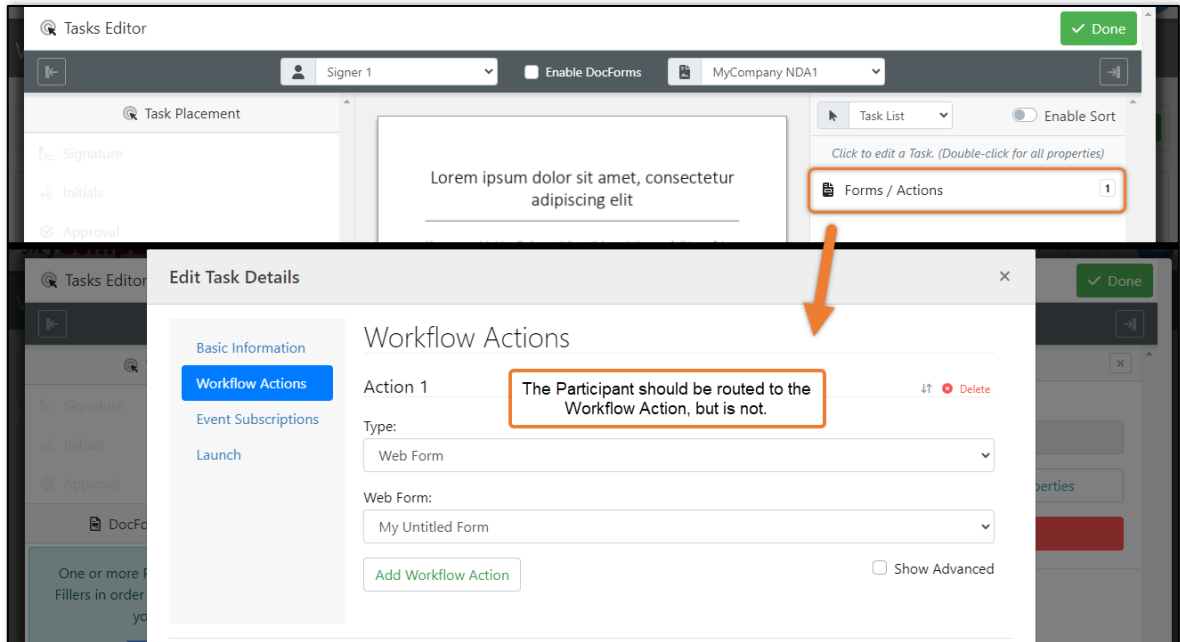
Document Setup

Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
1	MyCompany NDA	MyCompany_NDA.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	
2	Sample Document1	Sample Document1.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	
3	Test Document	Test Document.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	
4	NDA JH	NDA JH.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	

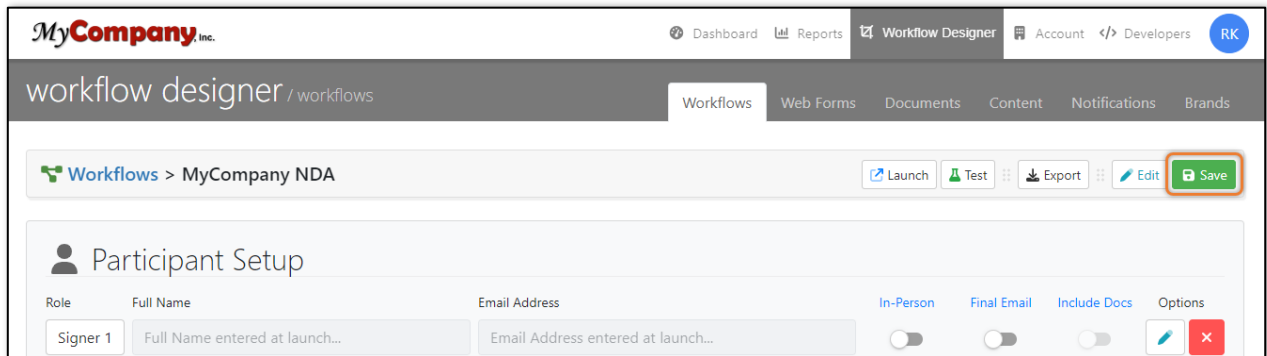
✓ Add Document(s)

[PEP-7954] - Fixed issue where *Forms/Actions* Workflow Actions, that were assigned to a task, would be skipped incorrectly. Please see the image below for the referenced settings and an example.

Release Notes

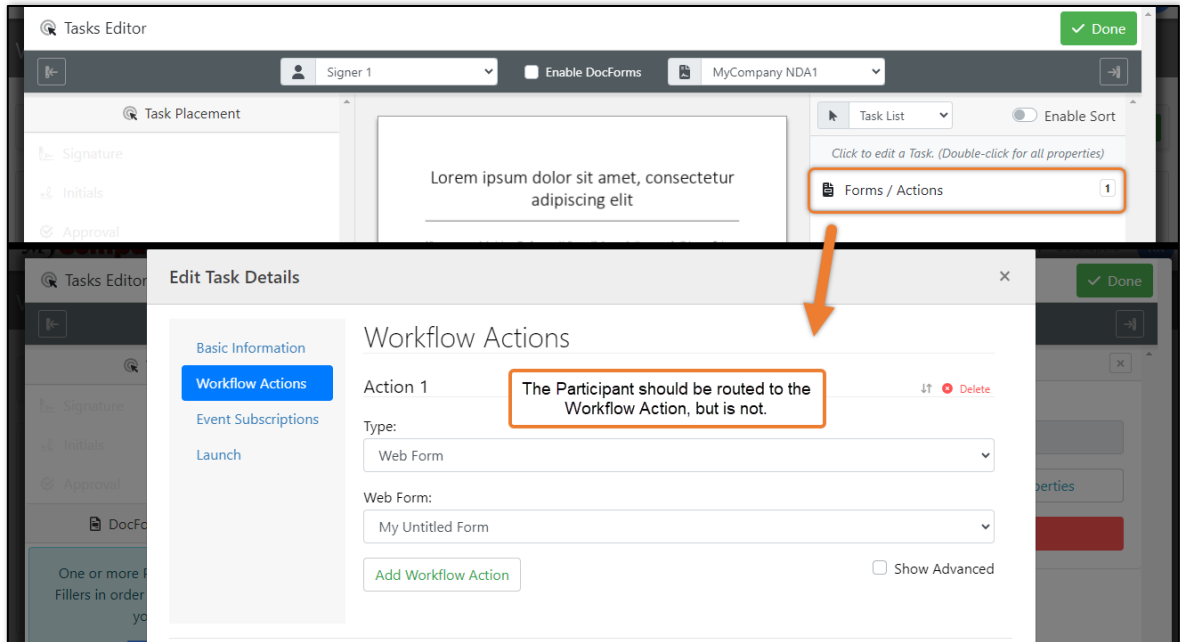


[PEP-7935] - Fixed issue where after hitting the Save button, it would become prematurely clickable again even though a Workflow is still being saved. Please see the image below for more information.

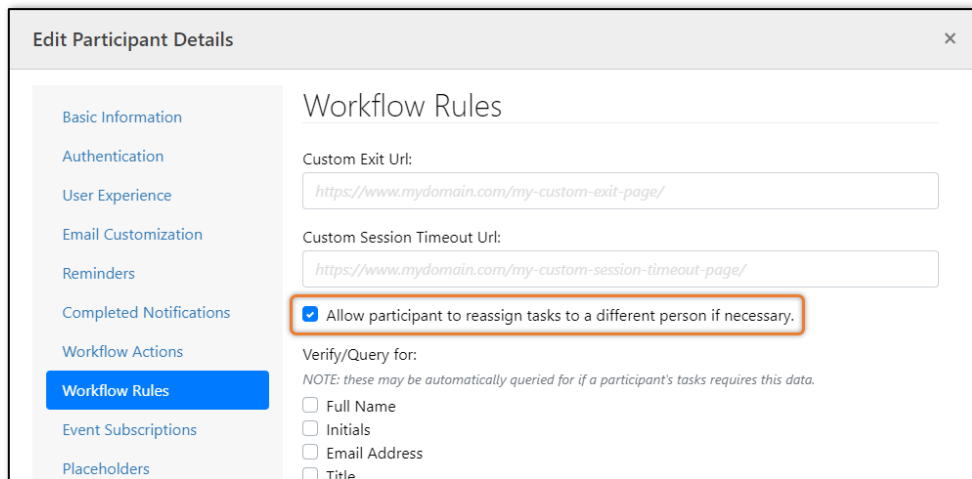


[PEP-7910] - Fixed issue where *Forms/Actions* Web Form Workflow Actions, that were assigned to a task, would be skipped incorrectly and route the user to the Exit Page. Please see the image below for the referenced settings and an example.

Release Notes



[PEP-7906] - Fixed issue where a Participant could not reassign a task and would instead see an error. Please see the image below for the referenced setting.



v5.18.6 Release

Release Date: 4/23/2024

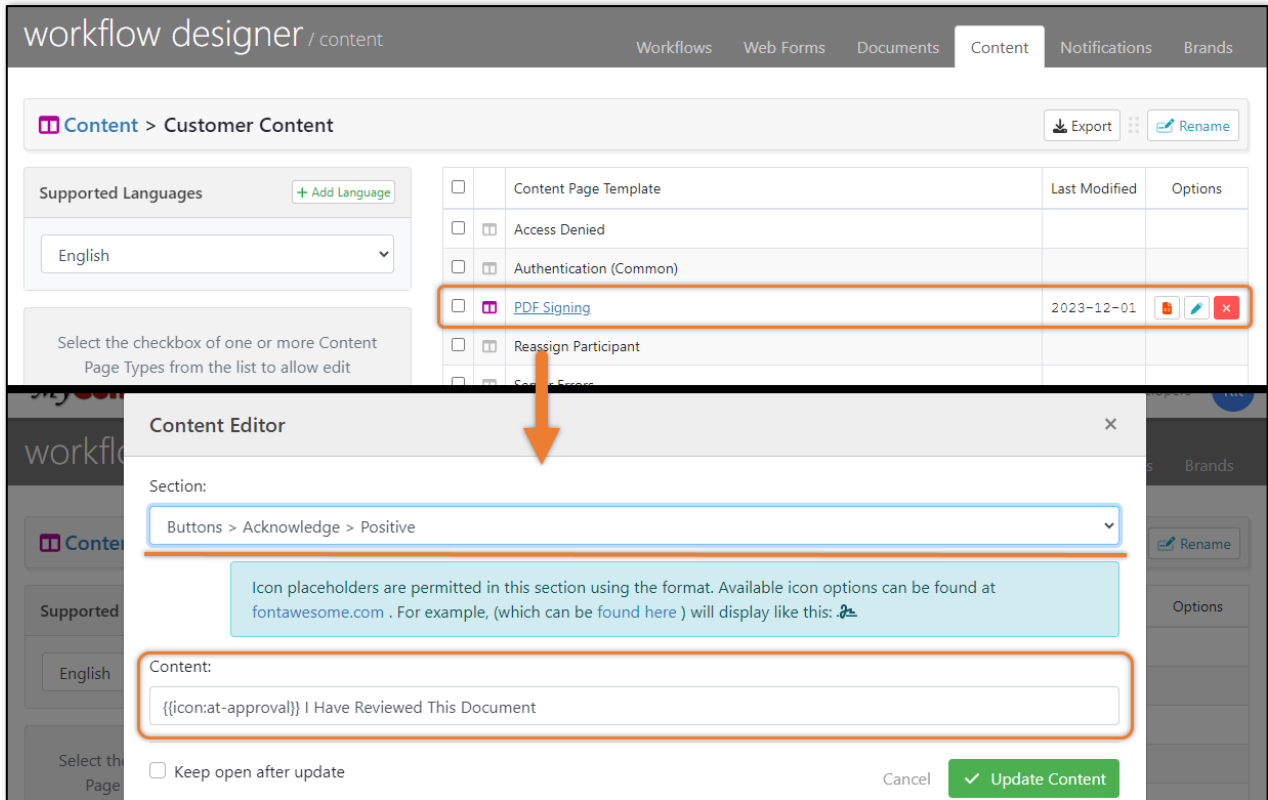
Bug Fixes

[PEP-7943] - Fixed issue where multiple emails are sent to carbon copy recipients. Please see the image below for the referenced settings.



Release Notes

[PEP-7928] - Fixed issue where when using custom content sets the acknowledgement *Positive* and *Negative* buttons would use the default text versus the custom content set. Please see the image below for the referenced settings.



[PEP-7921] - Fixed issue where emails would not send out properly to a Participant if they only had a carbon copy task. Please see the image below for the referenced settings.



v5.18.5 Release

Release Date: 4/11/2024

Bug Fixes

[PEP-7924] - Additional fixes for text stamping in a specific customer document.

v5.18.4 Release

Release Date: 4/5/2024

Important Notes:

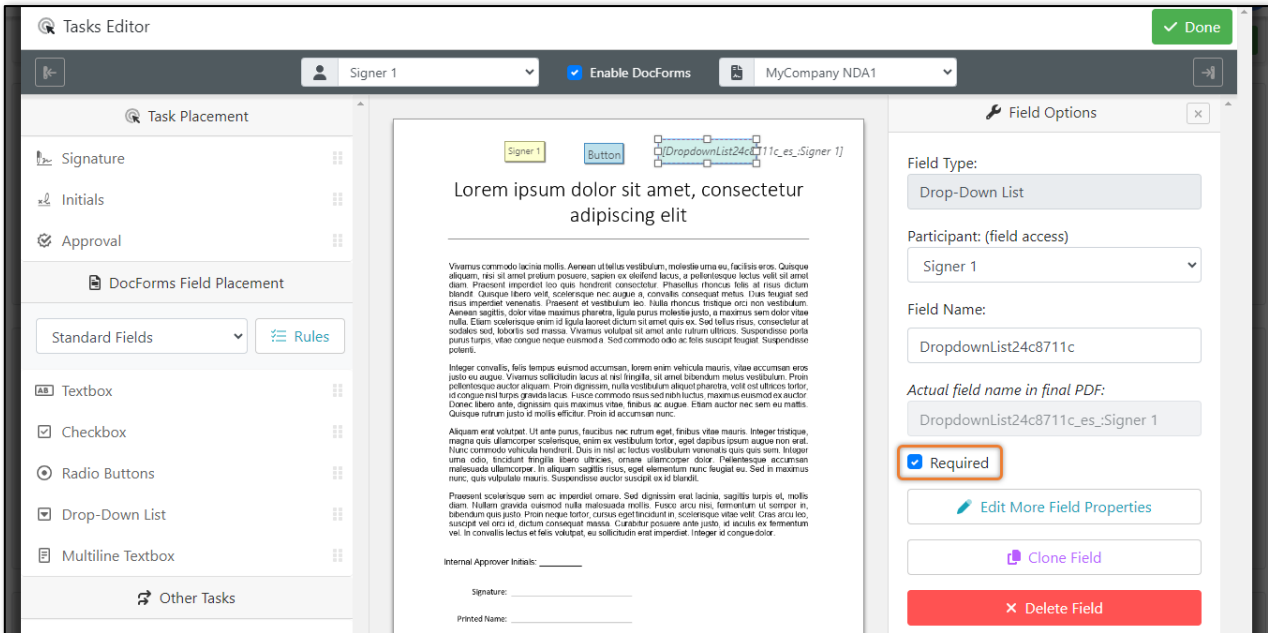
Version 5.18.5 reverted behavioral changes seen with text searching when used with text stamping. Please reference the 5.18.5 release notes for more information.

Bug Fixes

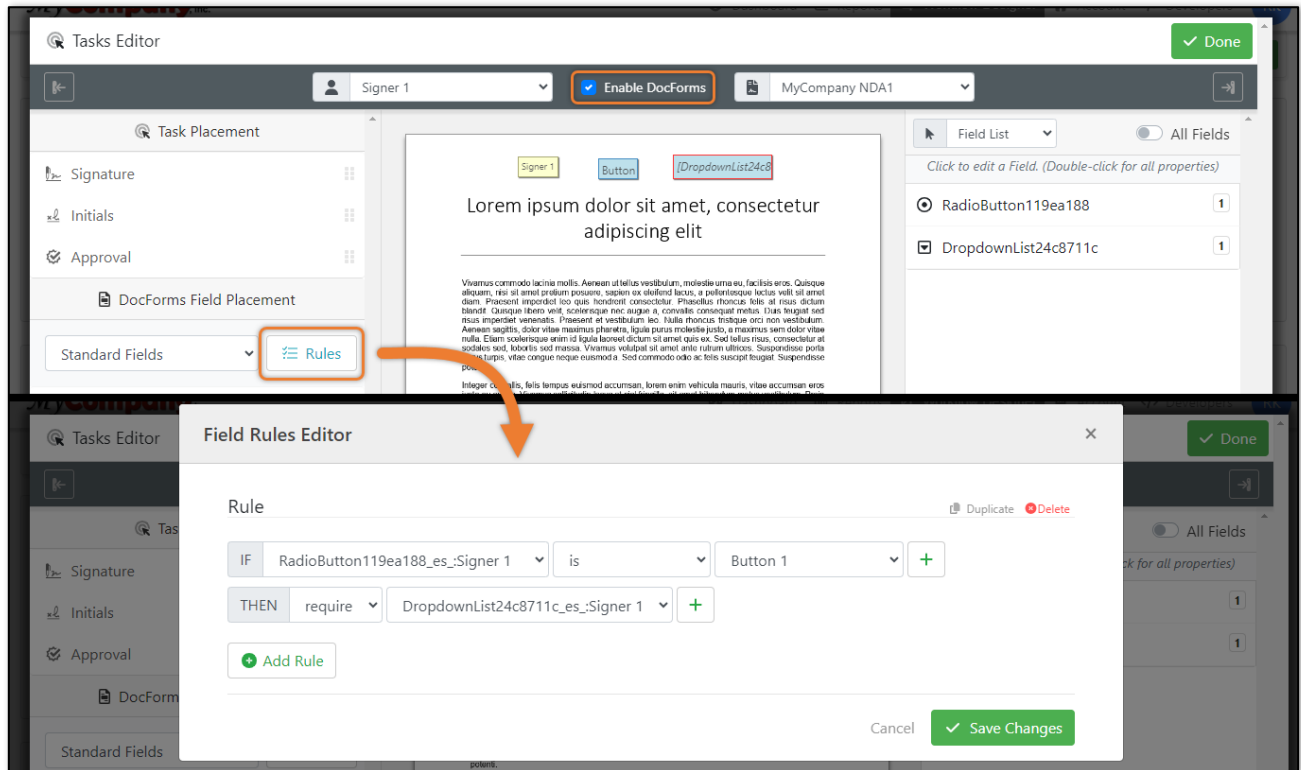
[PEP-7884] - Fixed issue where updating existing documents was only overwriting part of the previous document if the previous document was larger in size causing them to be corrupt.

Release Notes

[PEP-7854] - Fixed issue where required DocForm fields would not validate properly and a Participant could proceed to the next signing step even without answering the required fields. Please see the example below of a required field.



[PEP-7853] - Fixed issue where transactions created through the Rest API would not have the DocForm field rules applied. Please see the image below of an example of DocForm field rules.



[PEP-7505] - Fixed issue where logging request validation was creating errors when API logging was turned off.

v5.18.3 Release

Release Date: 3/29/2024

Bug Fixes

[PEP-7867] - Fixed issue where Transactions with a carbon copy task assigned to the first Participant would get stuck in a Pending status. Please see the images below for additional details and an example.

Release Notes

MyCompany Inc. | Dashboard | Reports | Workflow Designer | Account | Developers | RK

workflow designer / workflows

Workflows > NDA

Participant Setup

Reorder	Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
1	MyCompany Internal	Full Name entered at launch...	Email Address entered at launch...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Signer 1	Full Name entered at launch...	Email Address entered at launch...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

+ Add Participant + Add Me + Add Advanced

Document Setup

Document Title: MyCompany NDA | File Name: MyCompany_NDA.pdf | Is Upload: ☐ | Manage Tasks: Tag Document | Options: ☐

Final Email Notifications

Once your workflow transaction has been fully completed by all Participants, an email notification will be sent to the email addresses entered below using the following settings. If you want final email notifications set to any Workflow Participants, you select that option in the Participants Setup section above.

Tasks Editor

MyCompany Internal | MyCompany NDA

Task Placement

- Signature
- Initials
- Approval
- DocForms Field Placement
- Other Tasks
- Forms / Actions
- Delivery
- Carbon Copy

One or more Participants must be Form Fillers in order to add/edit Form Fields in your document.

Enable DocForms

Task for the second Participant

Task for the first Participant

Task List

- Carbon Copy

Click to edit a Task. (Double-click for all properties)

Signature: [Signature] | Printed Name: _____

[PEP-7866] - Fixed issue where Transactions containing Participants that have multiple carbon copy tasks assigned to them would get stuck in a Pending status. Please see the images below for additional details and an example.

Release Notes

The screenshot shows the 'workflow designer / workflows' interface. The top navigation bar includes 'Workflows', 'Web Forms', 'Documents', 'Content', 'Notifications', and 'Brands'. The main content area is titled 'Workflows > NDA' and contains two sections: 'Participant Setup' and 'Document Setup'.

Participant Setup: This section includes fields for 'Role' (MyCompany Internal), 'Full Name' (Full Name entered at launch...), and 'Email Address' (Email Address entered at launch...). There are also toggle switches for 'In-Person', 'Final Email', and 'Include Docs', and an 'Options' button. At the bottom, there are buttons for '+ Add Participant', '+ Add Me', and '+ Add Advanced'.

Document Setup: This section includes a table with columns for 'Reorder', 'Document Title', 'File Name', 'Optional', 'Is Upload', 'Manage Tasks', and 'Options'. The table contains two rows: 'MyCompany NDA' with file 'MyCompany_NDA.pdf' and 'NDA Internal Version' with file 'NDA_Internal Version.pdf'. There are also buttons for '+ Add Document(s)' and '+ Add Documents'.

The screenshot shows the 'Tasks Editor' interface. The top navigation bar includes 'MyCompany Internal', 'Enable DocForms', and 'MyCompany NDA'. The main content area is titled 'Tasks Editor' and contains a document preview and a task list.

Document Preview: The document preview shows a document with the title 'Lorem ipsum dolor sit amet, consectetur adipiscing elit'. The document content is a placeholder text. An orange arrow points from the 'Carbon Copy' task in the task list to the document preview.

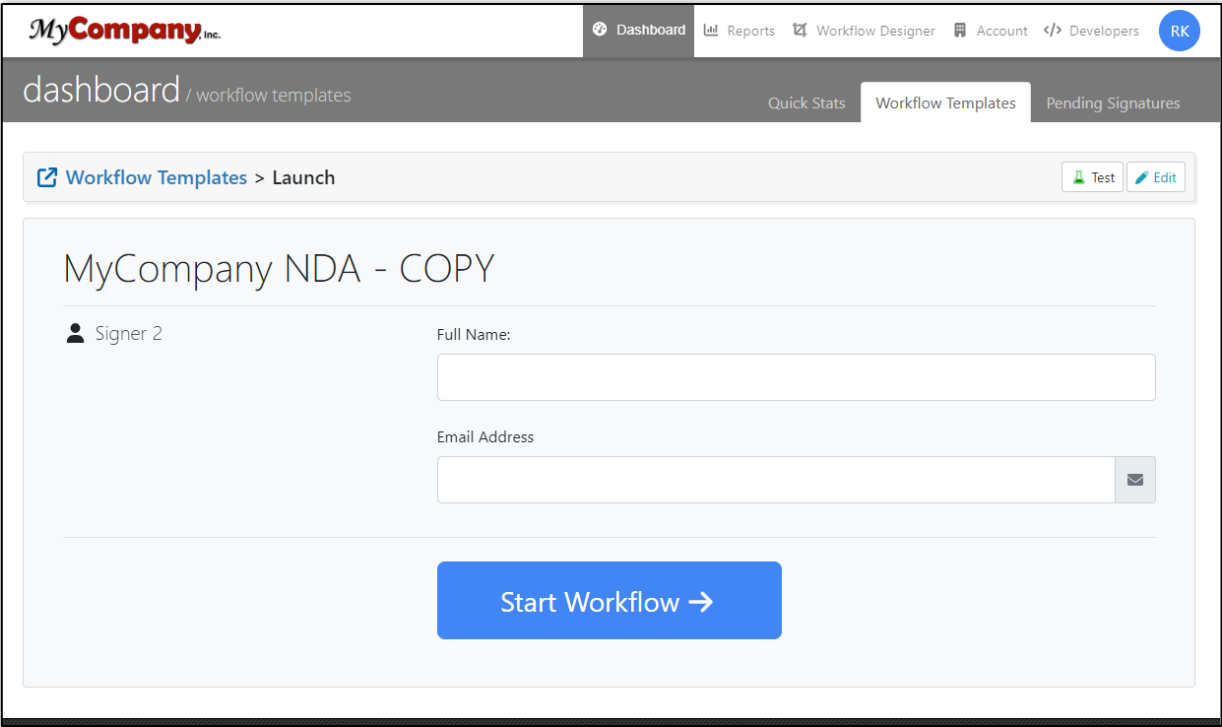
Task List: The task list is titled 'Task List' and includes a toggle for 'Enable Sort'. It contains a single task, 'Carbon Copy', which is highlighted with an orange box. The task list also includes a button for 'Click to edit a Task. (Double-click for all properties)'.

[PEP-7856] - Fixed issue where using the UpdateDocumentTextStamps() API call under certain use cases would cause a corrupted PDF document.

[PEP-7838] - Fixed an issue where license information was not being decrypted properly.

[PEP-7818] - Fixed issue where the Launch page would not load for the Launcher until all documents in the Workflow loaded successfully. Please see the image below for an example of a Launch page.

Release Notes



v5.18.2 Release

Release Date: 3/14/2024

Bug Fixes

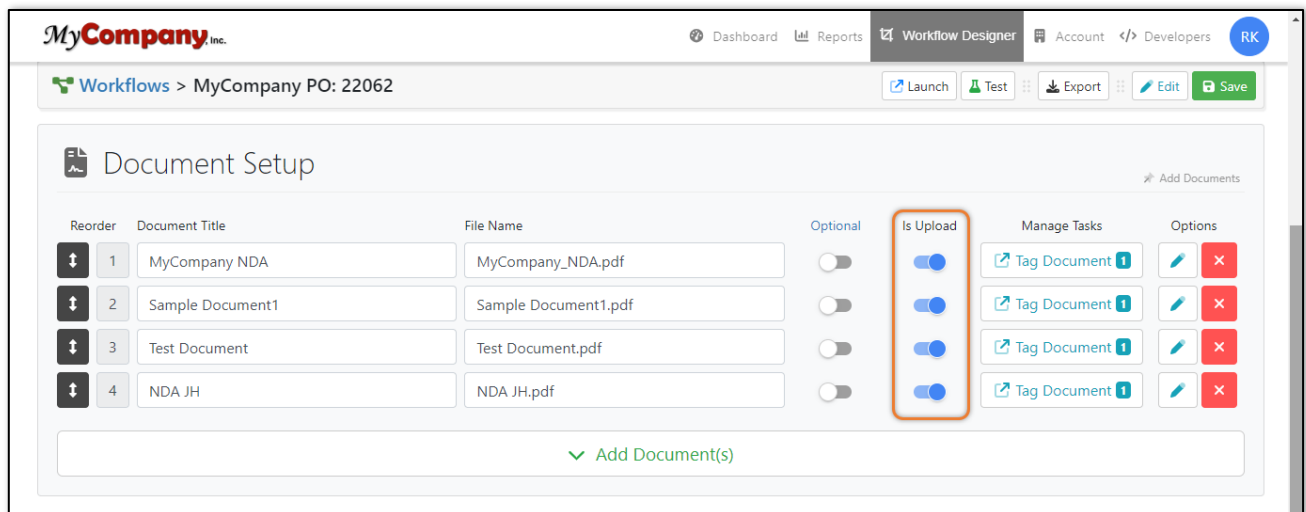
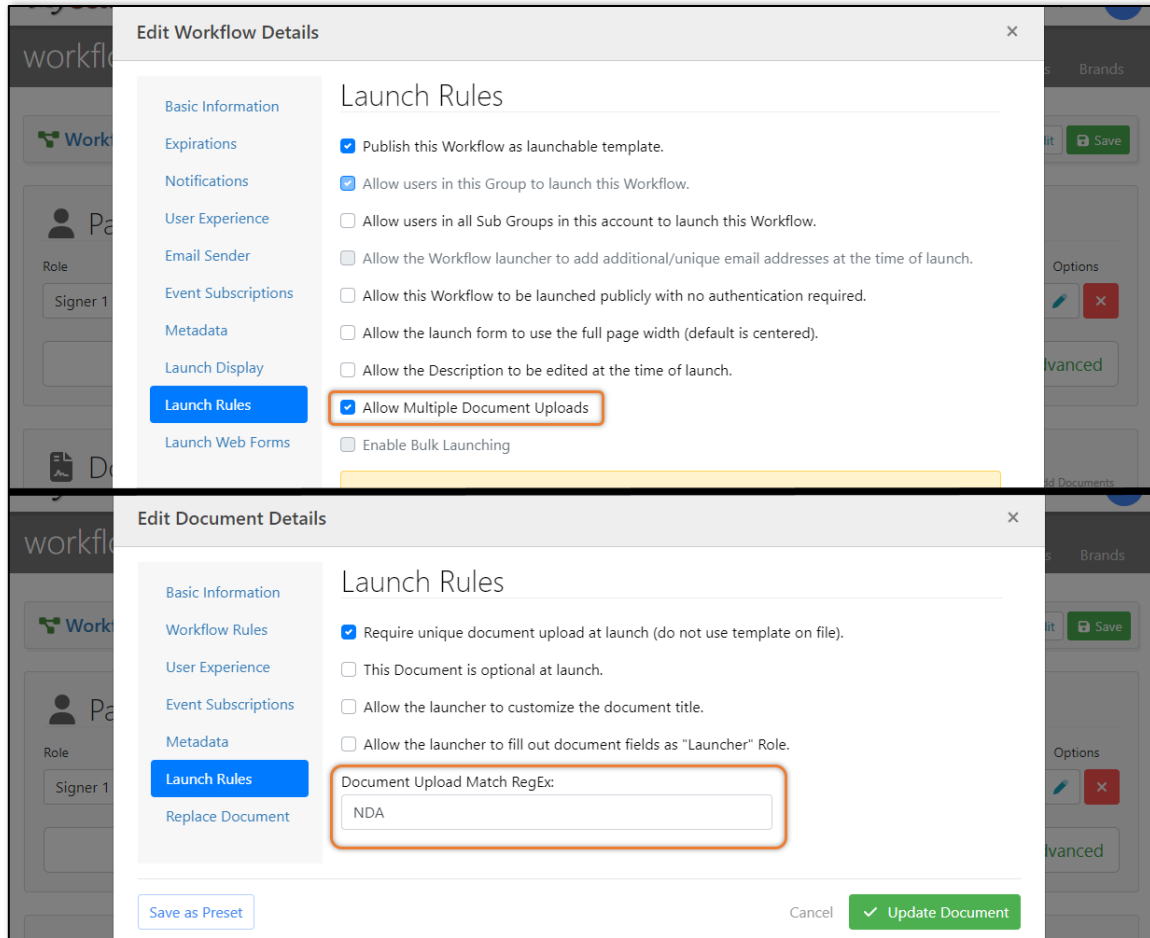
[PEP-7791] - Fixed issue where PermissionSets were not updating in the database making it look like all of the settings were removed. Please see the image below for the referenced settings.

The screenshot shows the 'Permission Sets' section of the MyCompany Inc. account page. The breadcrumb trail is 'account / permission sets'. The page has a search bar and a '+ Add Permission Set' button. The table below lists three permission sets: Administrator, Manager, and User. Each row has columns for ID, Name, System-Wide, Account-Wide, Sub Group Shared, and various permissions represented by icons. The 'Administrator' row has all permissions checked (green circles). The 'Manager' and 'User' rows have some permissions unchecked (red X's).

ID	Name	System-Wide	Account-Wide	Sub Group Shared	Permissions	Options
1	Administrator	✓	✓	✓	[All permissions checked]	[Edit] [Delete]
2	Manager	✓	✓	✓	[Some permissions unchecked]	[Edit] [Delete]
3	User	✓	✓	✓	[Some permissions unchecked]	[Edit] [Delete]

[PEP-7785] - Fixed issue where when utilizing the Bulk Document Upload feature, documents contained within a zip file would not match all documents on launch when using the Document Upload Match RegEx. Please see the images below for the referenced settings.

Release Notes



v5.18.1 Release

Release Date: 3/7/2024

Bug Fixes

[PEP-7755] - Fixed issue where TinyMCE would not properly load on Define Participant Workflow Actions. Please see the images below of the referenced settings and an example of the TinyMCE.

Release Notes

Edit Participant Details

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Launch Display

Launch Domain Restrictions

Launch Labels

Workflow Actions

Action 1

Type:
Define Another Participant

Participant to Define:
Signer 1

☒ Full Name options

☒ Email Address options

☐ Phone Number

☐ Title

☐ Organization

☐ Authentication

☐ Two-Factor Authentication

☒ Custom Email Message options

☐ Customize Page Content

Add Workflow Action

☐ Show Advanced

Save as Preset

Cancel

Update Participant

MyCompany, Inc.

Define Participant

Enter the information for the Participant below.

Full Name:

Email Address:

Email Message:

B I [bulleted list] [numbered list] A [font color] [font size] [link] [image]

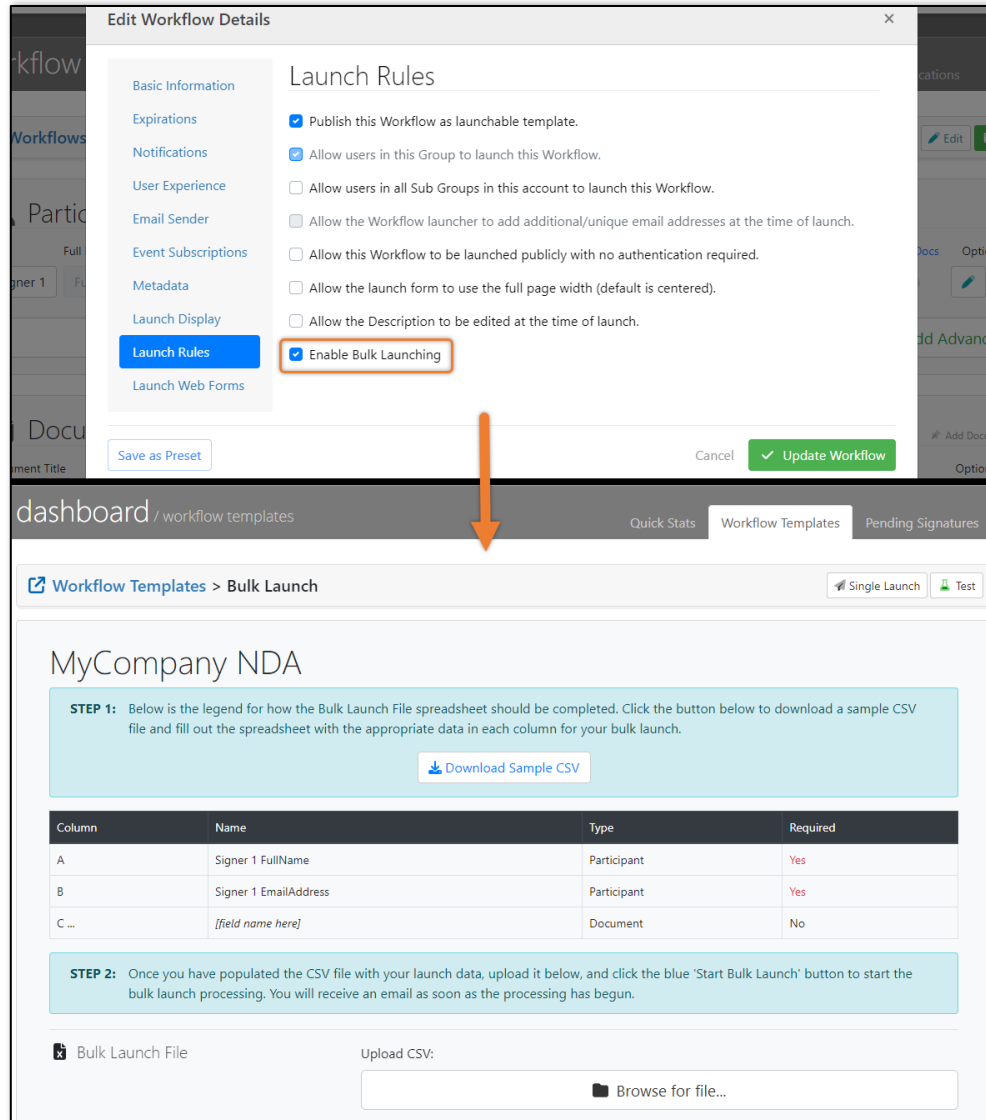
Update Participant

Cancel

v5.18.1.0

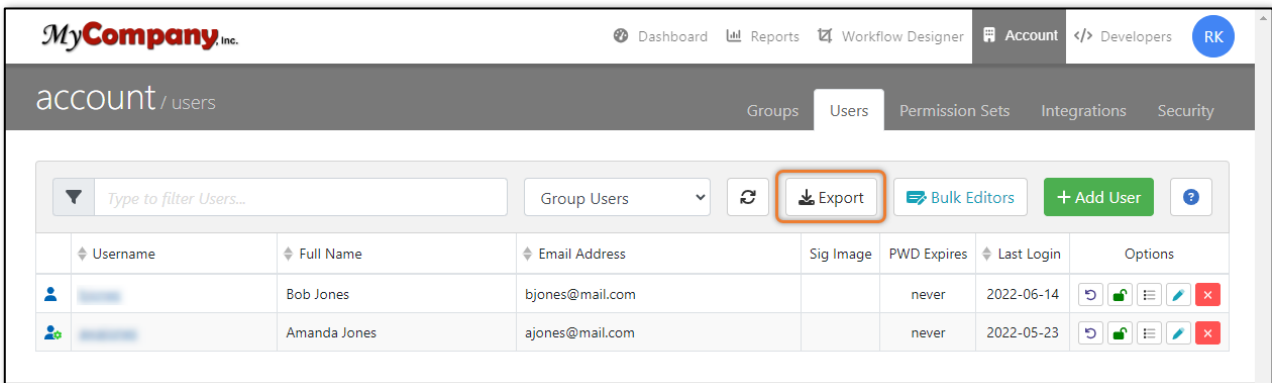
[PEP-7724] - Fixed issue where values in a Bulk Launching CSV would not update the workflow if the document was uploaded before launching. Please see the image below for the referenced settings.

Release Notes



[PEP-7718] - Fixed issue where a query for the Document Review page was running slowly. Updated a query to be more performant.

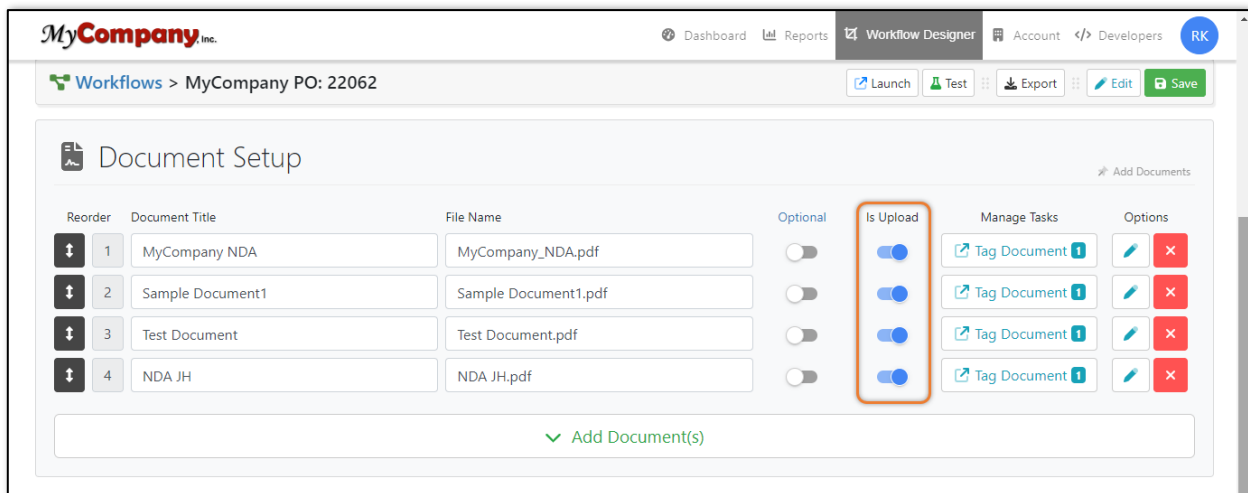
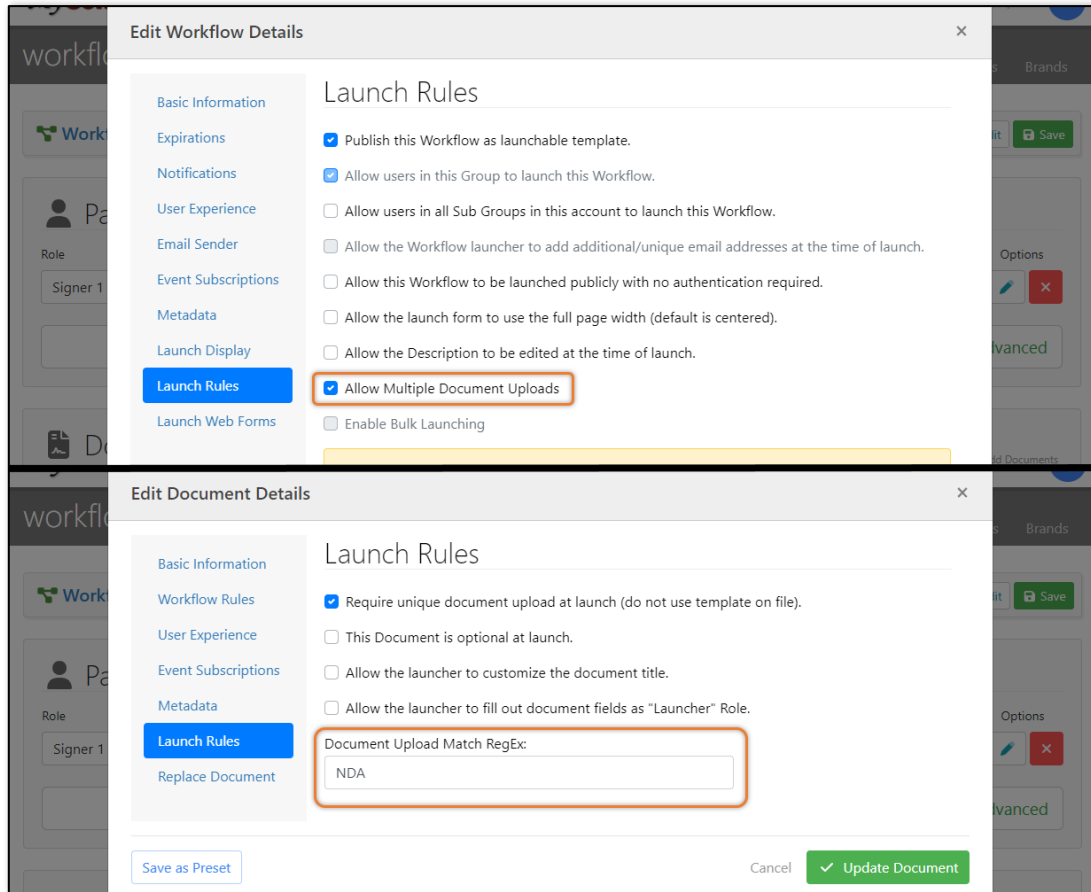
[PEP-7691] - Fixed issue where CSV exports would not be properly formatted due to commas. All strings are now wrapped in double quotes to ensure properly CSV exports. Please see the image below for an example of a CSV export.



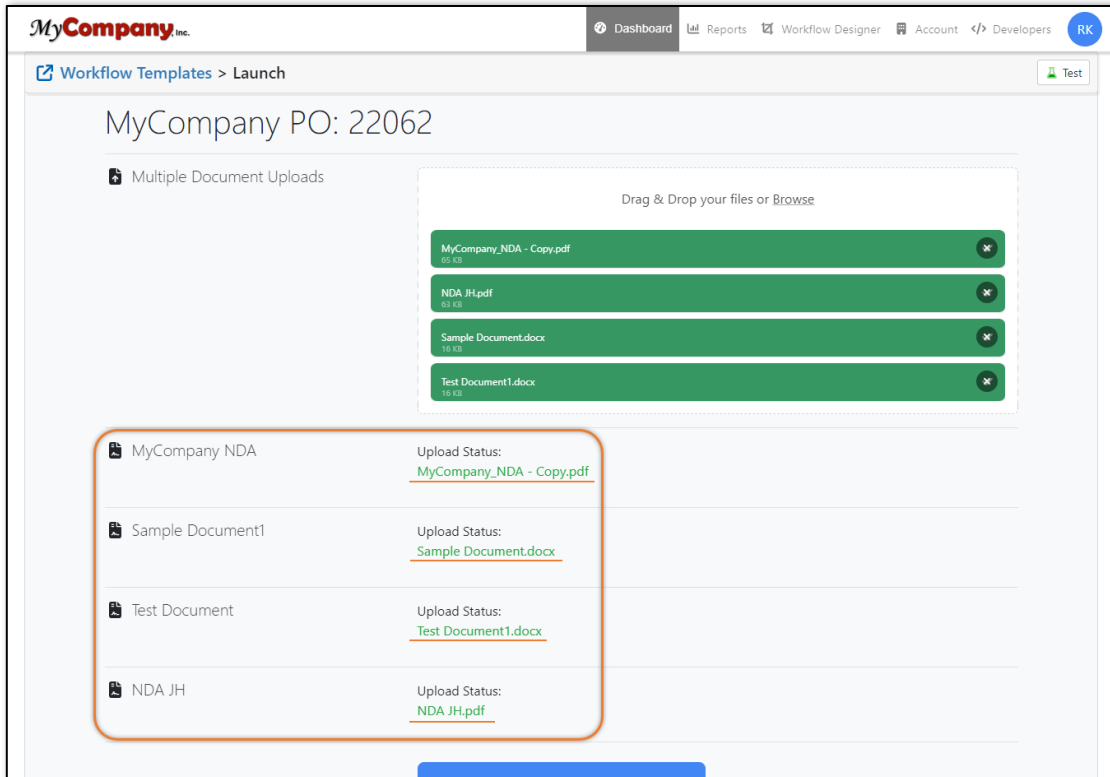
[PEP-7683] - Fixed issue where the Control Panel would not show which uploaded file was matched to a particular document when utilizing the Multiple Document Uploads functionality. Update the control panel UI to reflect which

Release Notes

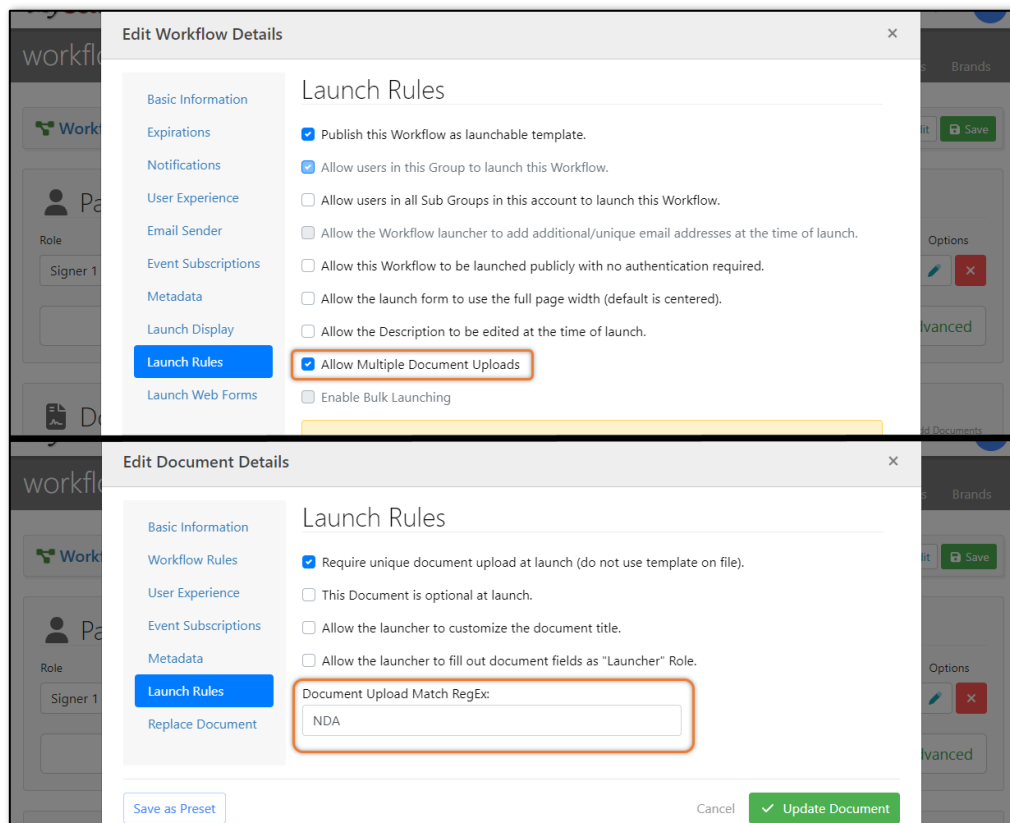
document is being used when uploading a document on the launch screen. Please see the images below for the referenced settings and an example of uploaded files being matched to documents on the launch screen.



Release Notes



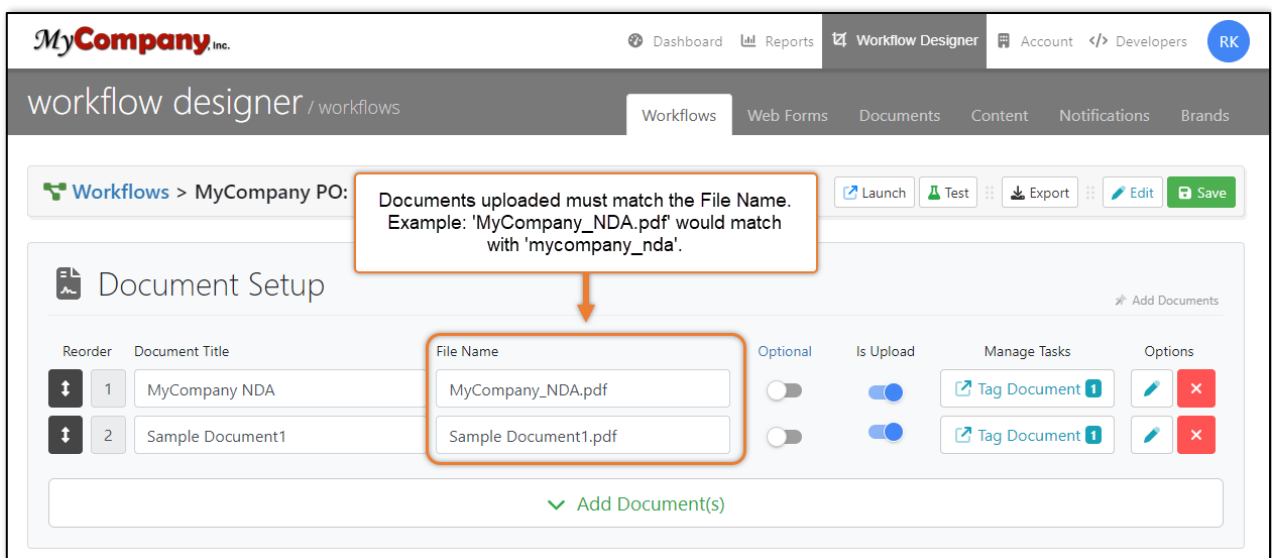
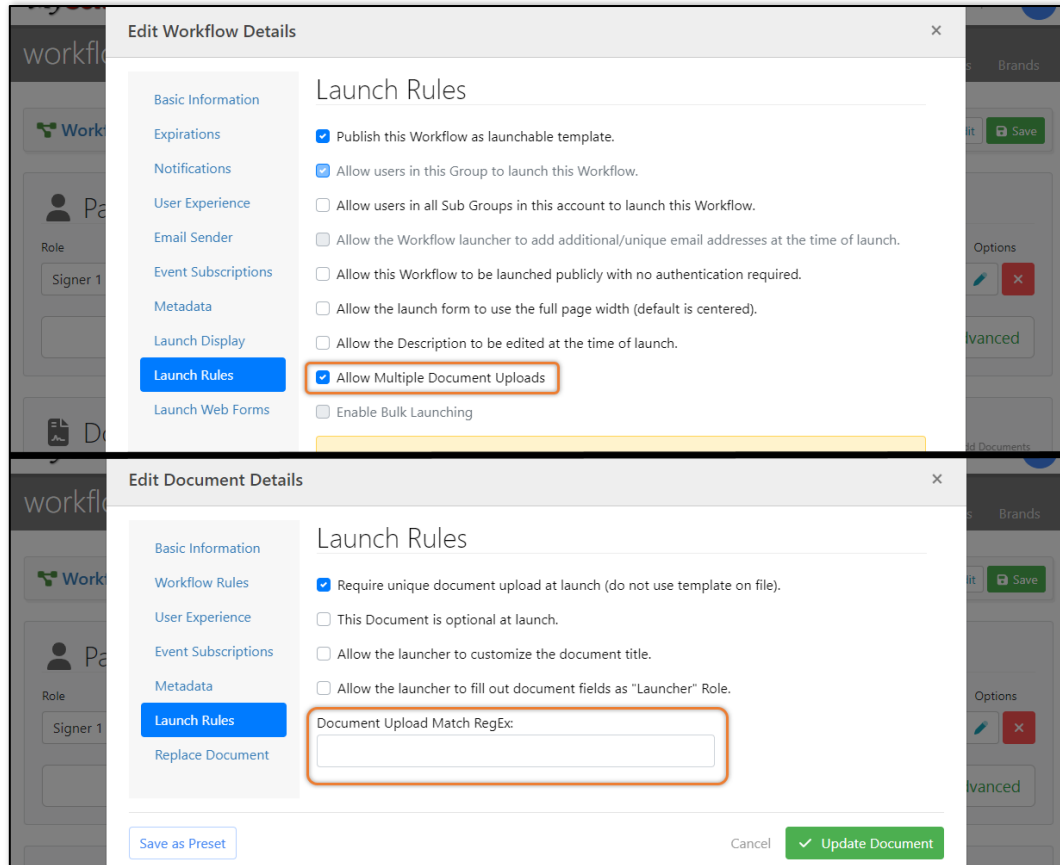
[PEP-7682] - Fixed issue where when utilizing the Bulk Document Upload feature, if a document matched both conditions for two document uploads it would apply the match to both documents when it should only match for the first document. Changed how bulk document uploading is matched so that it will only match on a single document that is missing a file; so that one uploaded document doesn't match with multiple workflow documents. Please see the image below for the referenced settings.



Release Notes

[PEP-7678] - Fixed issue where SSO logins may fail due to duplicate keys in JWT.

[PEP-7677] - Fixed issue where when using the Multiple Document Uploads functionality, without RegEx, documents were required to match the File Name exactly (including the extension). Updated the file matching logic so that it will match the File Name field (minus the extension and ignoring case sensitivity) with the uploaded file when not utilizing the RegEx option. Please see the images below for the referenced settings and an example of the new logic.



[PEP-7675] - Fixed issue where a typo was seen in Signature Block Data. Please see the image below referencing the fixed typo.

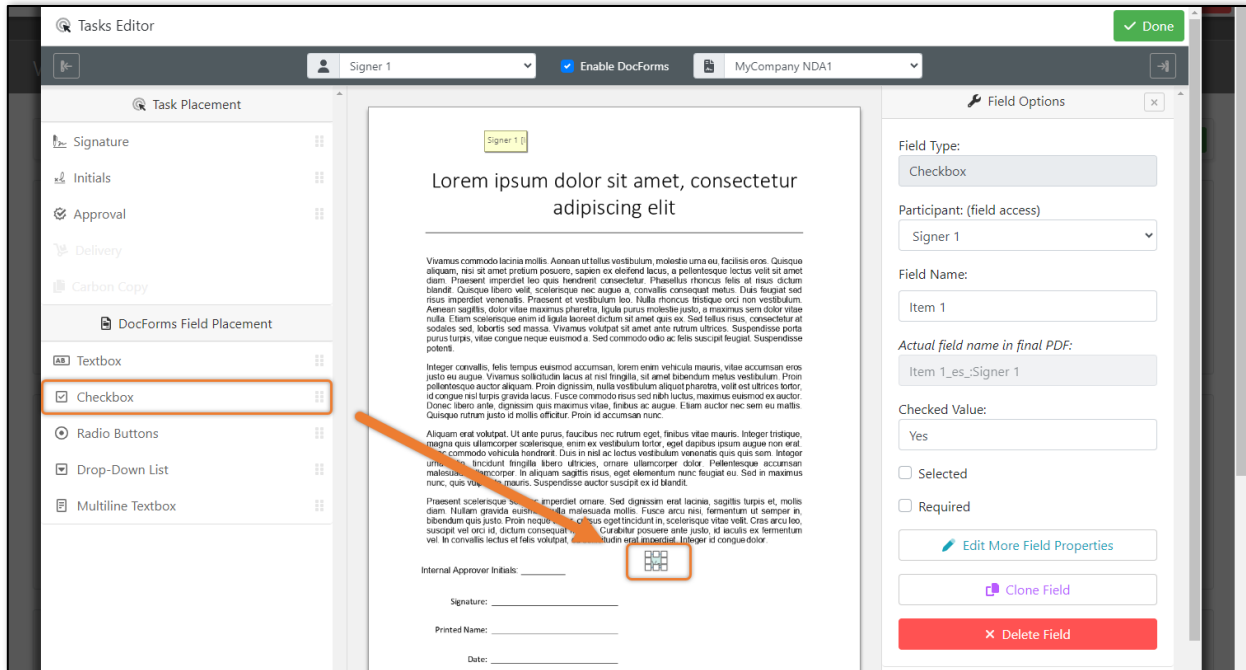
Release Notes

The screenshot shows a document form titled "PO Approver" with a header bar containing "Enable DocForms" and "MyCompany NDA". The main content area contains placeholder text "Lorem ipsum dolor sit amet, consectetur adipiscing elit" and several paragraphs of Lorem Ipsum. A signature block is visible with the text "Internal Approver Initials:" and "Signature:". To the right, a "Sig Block Data Options" panel is open, showing settings for "Data Type: Signature Date", "Font: Helvetica", "Color: Blue", and "Date Format: 12/1/2020". The panel also includes checkboxes for "Use International Date Format", "Include Time" (checked), "Use 24 Hour Time Format", and "Include Time Zone" (highlighted with a red box). A button "Edit More Data Item Properties" is at the bottom of the panel.

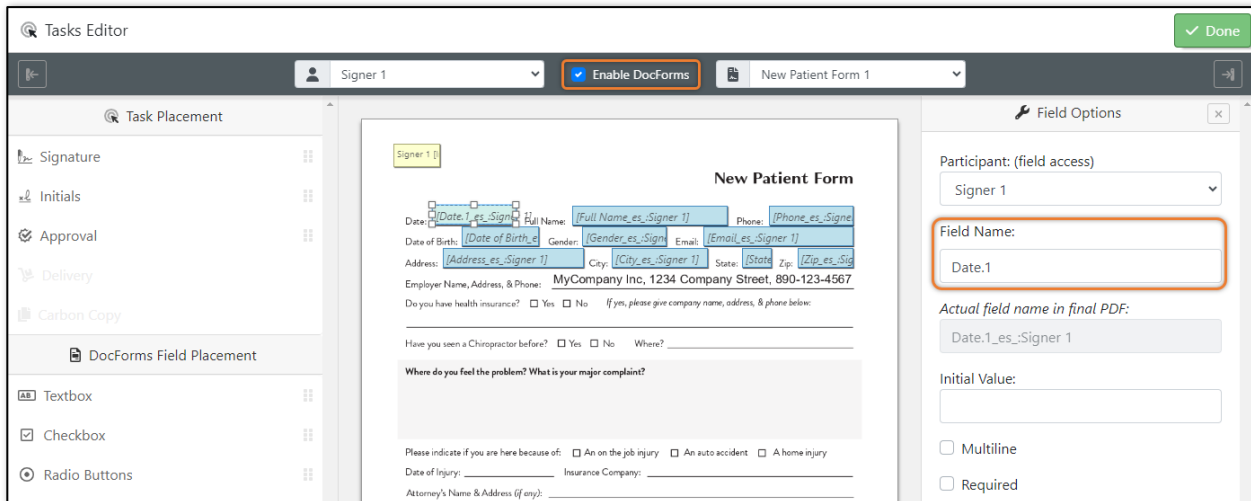
[PEP-7669] - Fixed issue where certain scenarios may cause checkboxes to not properly uncheck when Participants revisit Web Forms and DocForms to update their selection before completing their assigned document tasks. Please see the images below for the referenced settings.

The screenshot shows the "workflow designer / web forms" interface. On the left, a sidebar titled "Add Fields" lists various field types: "Standard Fields", "Textbox", "Multiline Textbox", "Checkboxes" (highlighted with a red box), "Dropdown List", and "Radio Buttons". An orange arrow points from the "Checkboxes" field type to a preview window on the right. The preview window shows a form titled "Untitled Form" with the text "This is my form. Please fill it out." and a section titled "Untitled Check List:" containing a single checkbox labeled "Item 1". Below the list are buttons for "Save and Continue" and "Exit".

Release Notes



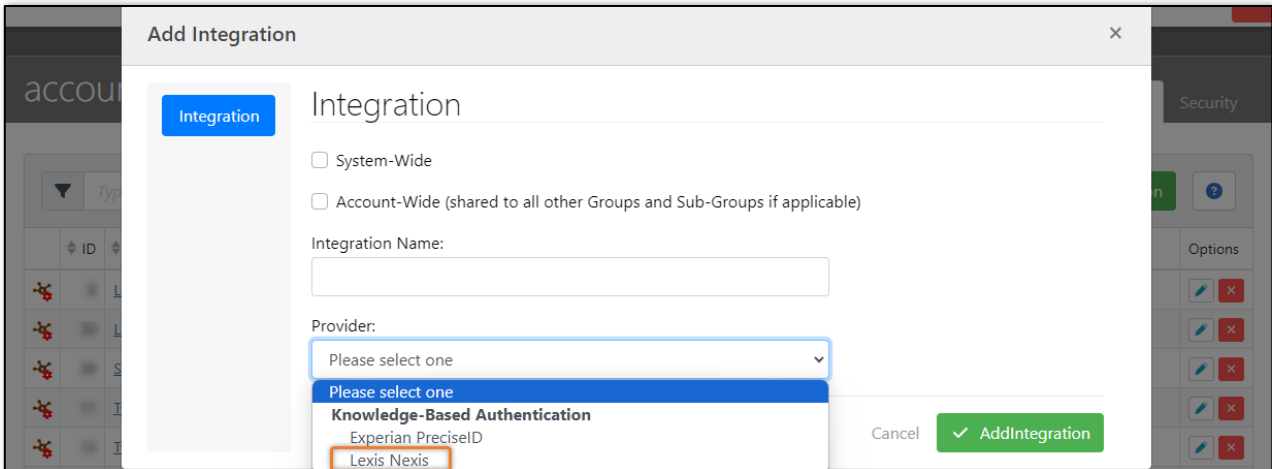
[PEP-7666] - Fixed issue where Field Name's that contained a period could prevent DocForms from loading properly. Please see an example and additional details in the image below.



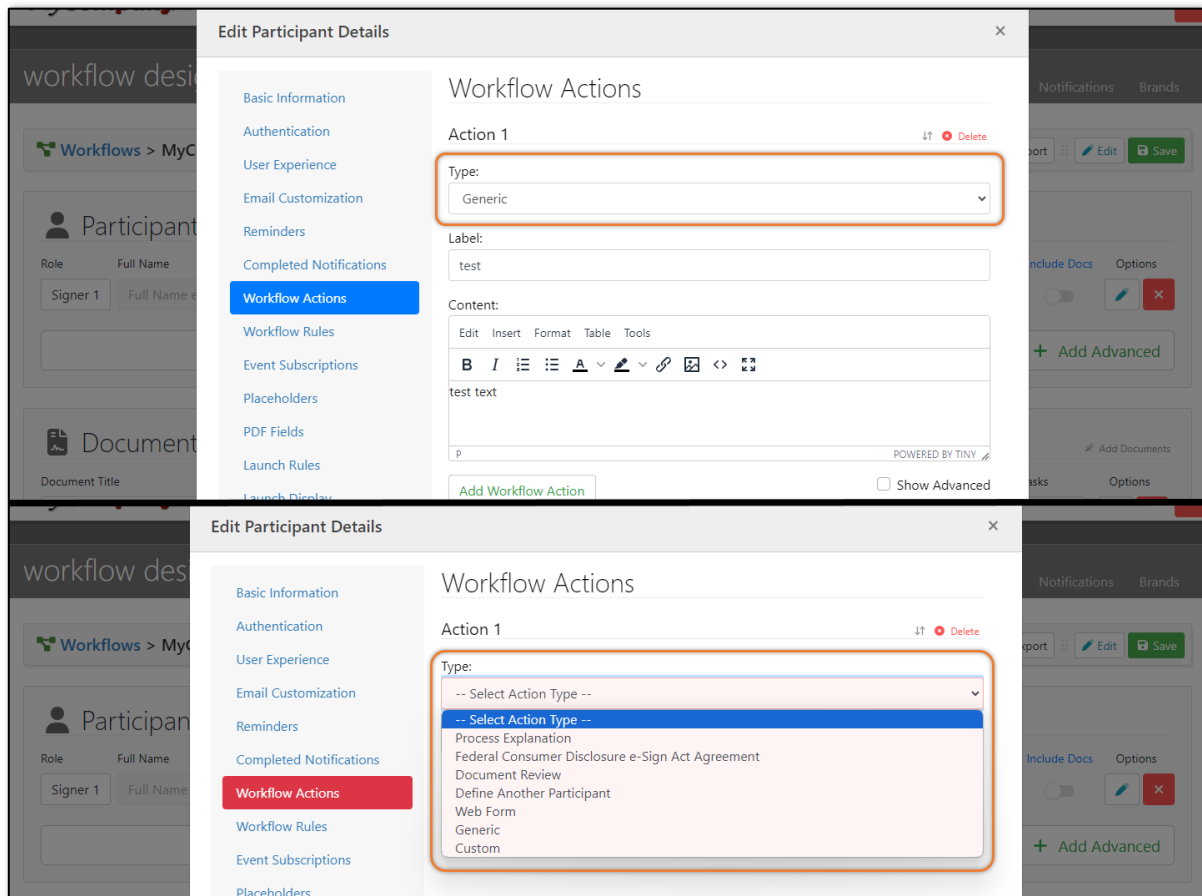
[PEP-7648] - Fixed issue where document file links, for merged PDF's, would show the documents in a different order than what is seen in the Control Panel. Added 'OrderBy' to GetDocuments() DB call to preserve the original document order.

[PEP-7642] - Fixed issue where Lexis Nexis "Match Data" functionality would not behave as expected when a match is not found. Instead of the user seeing a data mismatch error, no error is presented and the session expires right away.

Release Notes

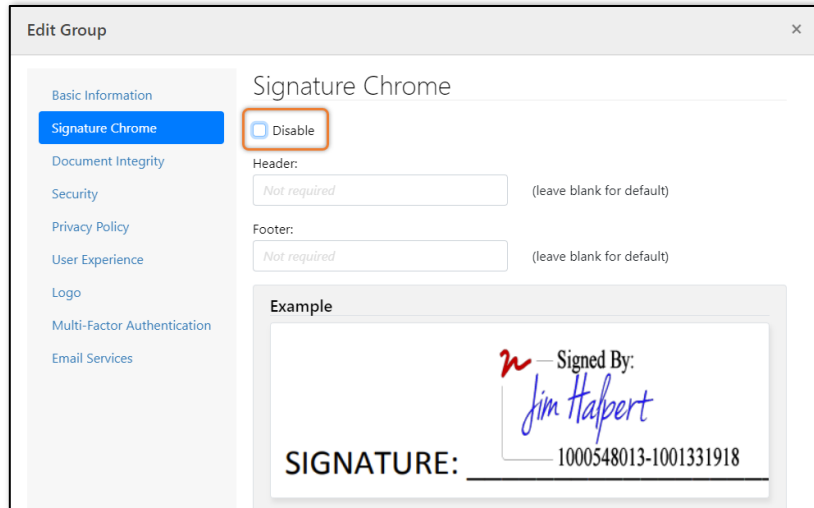


[PEP-7641] - Fixed issue where changing a Workflow Action Type from *Generic* to a different type caused the workflow to not function properly. The Workflow Action would stay as *Generic* even though it was changed. Please see the image below for the referenced settings.

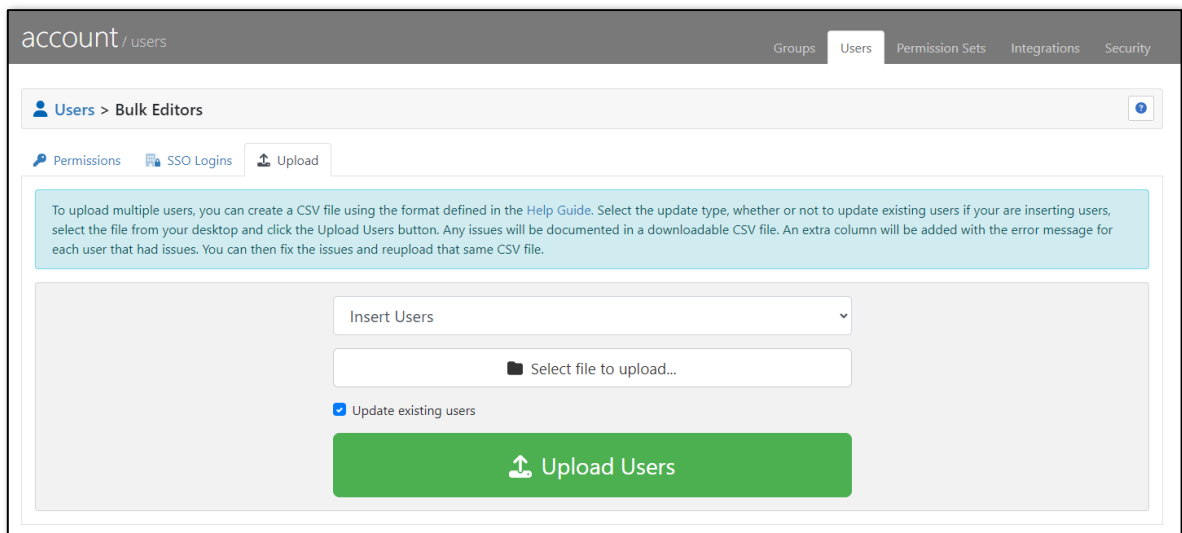


[PEP-7625] - Fixed issue where if Signature Chrome was enabled at the server level but was disabled at the group level, the system would not handle signatures properly and signings would fail.

Release Notes



[PEP-7620] - Fixed issue where when utilizing the Bulk User Upload feature the Password field was required. The Password field is no longer required for Bulk User Upload, Inserts, and Updates. If you don't supply a password upon insert, one will be automatically generated. If you don't supply a password upon update, it will just keep the existing password in place. Please see the image below for the referenced settings.

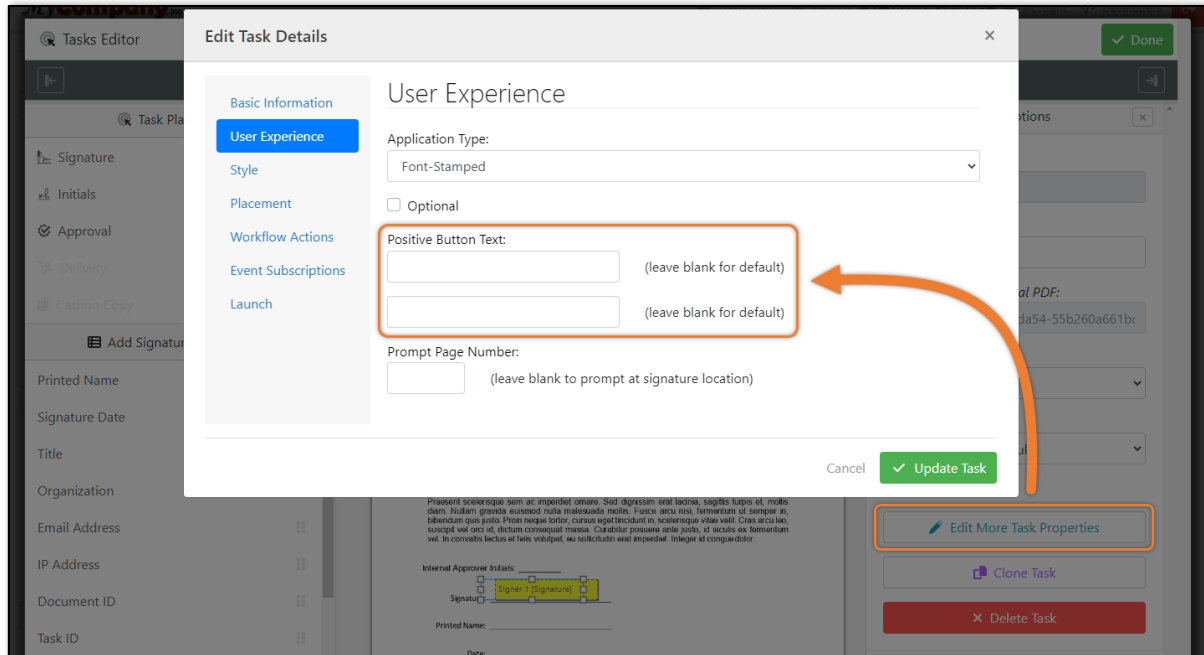


[PEP-7605] - Fixed issue where Carbon Copy emails would not send if they were a task assigned to the last Participant. The system will now only update Carbon Copy to a complete status once the email is sent. Please see the image below for the referenced settings.

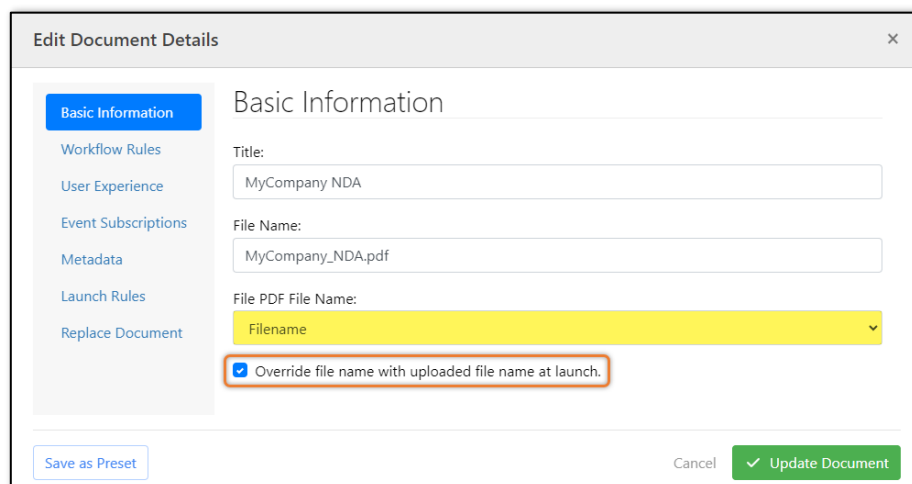
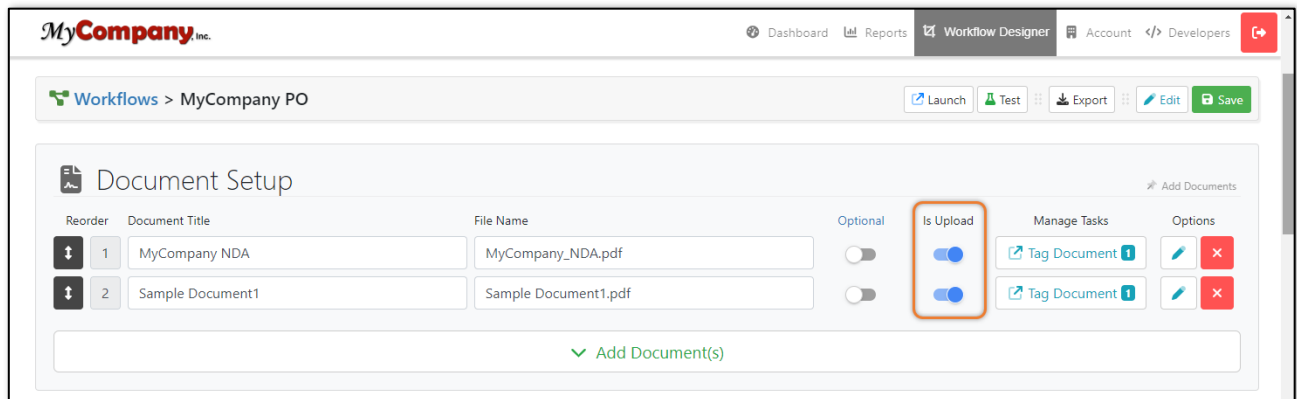


[PEP-7603] - Fixed issue where the *Negative Button Text*: label was missing in the User Experience settings under Edit Task Details. Please see the image below of an example where the label was missing.

Release Notes



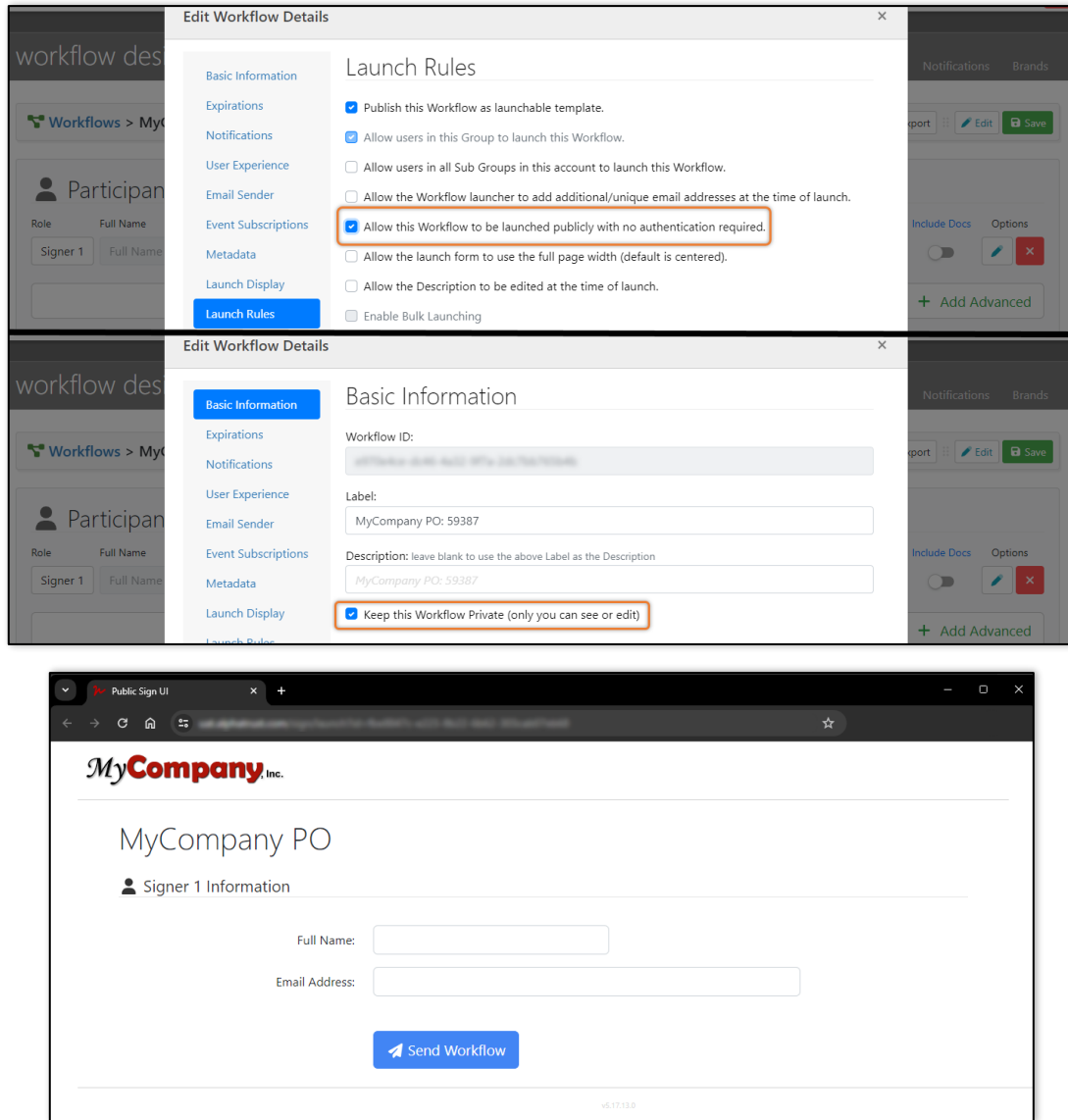
[PEP-7590] - Fixed issue where an optional document's File Name was not properly overridden with the uploaded file name when set in the workflow to do so. This was only seen with workflows that have multiple optional documents and where the File PDF File Name is set to Filename. Please see the images below for the referenced settings.



[PEP-7588] - Fixed issue where there was no support for multi-subnet failover clusters. Added support for SQL Server multi-subnet failover clusters.

Release Notes

[PEP-7585] - Fixed issue where non-public workflows could still be launched publicly if it was previously available publicly. Please see the images below for the referenced settings and an example of a public Launch page.

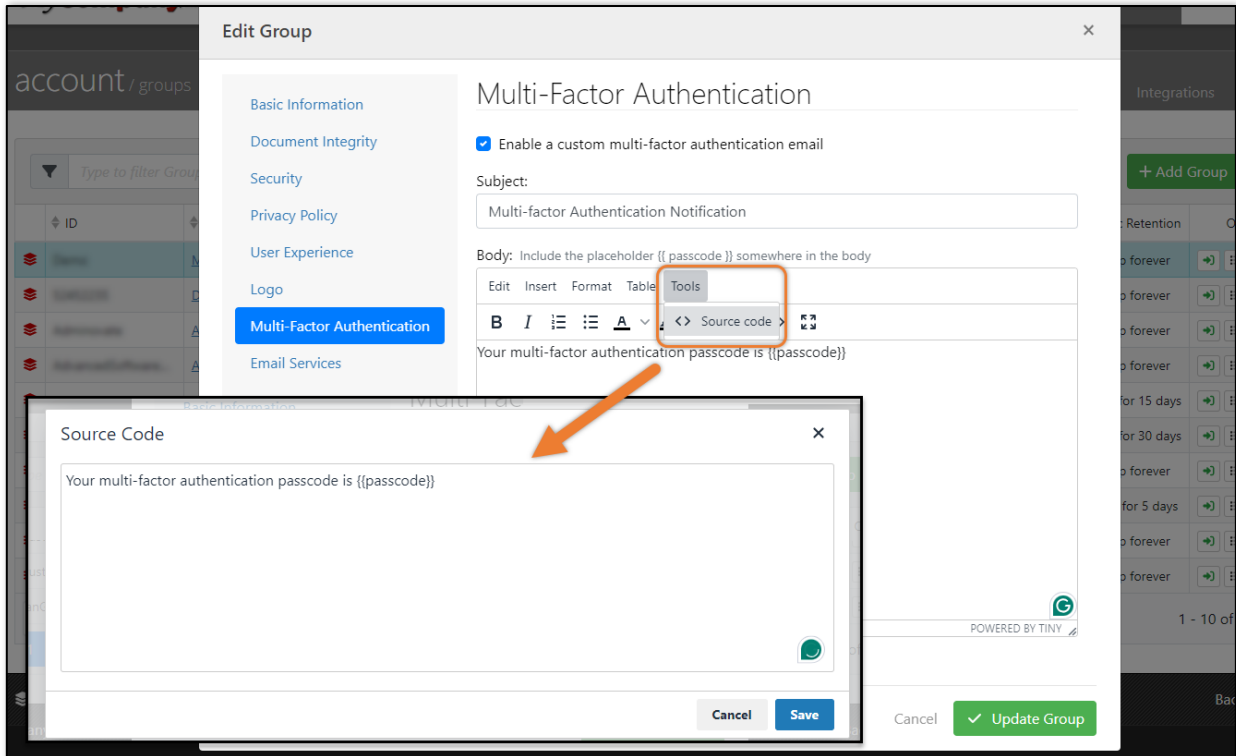


[PEP-7568] - Fixed issue where Delivery and Carbon Copy tasks would lose their page number value. Please see the image below for more information.

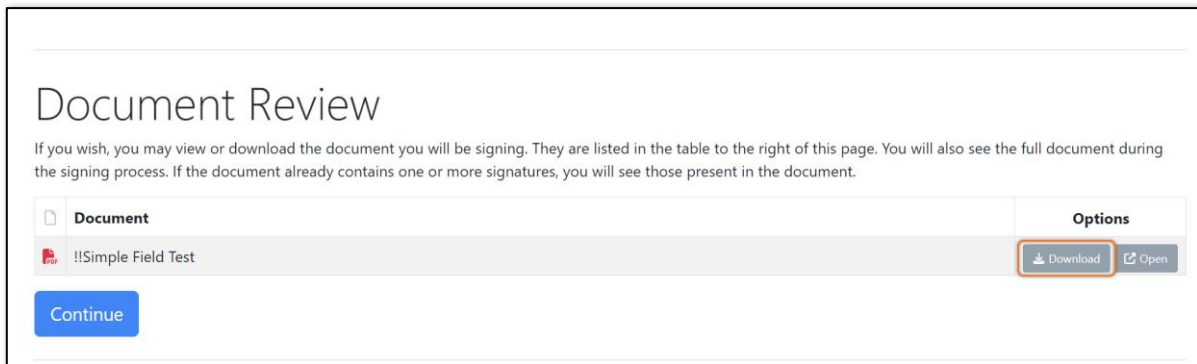


[PEP-7565] - Fixed issue where users would not be able to edit and customize a Groups multi-factor authentication email via the source code tool. Please see the image below for the settings referenced.

Release Notes



[PEP-7512] - Fixed issue where the Download Button was not shown on the Document Review page. Please see the image below for more information.



[PEP-7428] - Fixed issue where the Participant's access order would be calculated incorrectly after the transaction is launched. This issue would only occur when the second participant had a carbon copy task assigned to them. Please see an example and referenced settings in the images below.



Release Notes

[PEP-7275] - Fixed issue where Signature Block Data placement was not respecting the default Offset Start Position of "Left" for the Placeholder Type *Search Text*. Please see the images below for additional details and the settings referenced.

The screenshot shows the 'workflow designer / workflows' interface. The top navigation bar includes 'Workflows', 'Web Forms', 'Documents', 'Content', 'Notifications', and 'Brands'. Below this, the 'Workflows > MyCompany NDA' section contains buttons for 'Launch', 'Test', 'Export', 'Edit', and 'Save'. The 'Document Setup' section displays 'Document Title' as 'New Patient Form 1' and 'File Name' as 'New_Patient_Form_1.pdf'. It also has an 'Is Upload' toggle and a 'Manage Tasks' button with a 'Tag Document' link. An orange arrow points from this 'Tag Document' link to the 'Signature Block Data' table in the 'Tasks Editor' section below. The 'Tasks Editor' shows a table with columns: Label, Task Type, Placeholder Type, Placeholder/Position, Participant, and Options. The 'Signature Block Data' table has columns: Data Type, Placeholder Type, Placeholder/Position, and Options. The 'Placeholder Type' is set to 'Search Text' and the 'Placeholder/Position' is 'date'.

The 'Edit Signature Block Data Details' dialog box is shown with the 'Placement' tab selected. The 'Basic Information' tab is also visible. The 'Placement' section includes the following fields: 'Placement Type' (Text Placeholder), 'Placeholder Text' (date), 'Page(s) to Search' (All Pages), 'Instance' (1), 'Offset Start Position' (Left), 'Horizontal Offset' (with a double-headed arrow), and 'Vertical Offset' (with a double-headed arrow). There is a checkbox for 'Do not prevent Transaction from creating if placement isn't found'. The 'Offset Start Position' field is highlighted with an orange box. The dialog has 'Cancel' and 'Update Data' buttons at the bottom.

Release Notes

[PEP-6292] - Fixed issue where when utilizing a Workflow with an *Is Upload* document and selecting a *Registered User* at launch, the required fields of Title and Organization of the Registered User are not populated properly and the Workflow is unable to be launched. Please see the images below for the referenced settings.

The screenshot shows the 'Document Setup' interface for a workflow named 'MyCompany NDA'. The 'Is Upload' toggle is highlighted with an orange box. The 'Document Title' is 'New Patient Form 1' and the 'File Name' is 'New_Patient_Form_1.pdf'. The 'Is Upload' toggle is currently turned on. The 'Manage Tasks' section includes a 'Tag Document' button. The 'Options' section includes a 'Save' button. The 'Add Document(s)' button is at the bottom.

The screenshot shows the 'Edit Participant Details' dialog box with the 'Authentication' tab selected. The 'Type' is set to 'Registered User'. The 'Allow Launcher to choose Registered User' checkbox is checked. The 'Use two-factor authentication' checkbox is unchecked. An orange arrow points from the 'Allow Launcher to choose Registered User' checkbox to the 'Launch' workflow screen below. The 'Launch' screen shows the 'MyCompany NDA' workflow. The 'User' dropdown menu is open, showing the selection '-- Any Registered User --'. The 'Title' and 'Organization' fields are empty. The 'Send Workflow' button is at the bottom.

v5.18.0 Release

Release Date: 3/7/2024

New Features

[PEP-7485] - Added the ability for checkboxes to be automatically selected for matched optional documents when 'Allow Multiple Document Uploads' is enabled. Please see an example and the referenced settings in the images below.

Release Notes

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Launch Rules

☒ Publish this Workflow as launchable template.

☒ Allow users in this Group to launch this Workflow.

☐ Allow users in all Sub Groups in this account to launch this Workflow.

☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.

☐ Allow this Workflow to be launched publicly with no authentication required.

☐ Allow the launch form to use the full page width (default is centered).

☐ Allow the Description to be edited at the time of launch.

☒ Allow Multiple Document Uploads

☐ Enable Bulk Launching

MyCompany Inc.

Dashboard

Reports

Workflow Designer

Account

Developers

RK

workflow designer / workflows

Workflows

Web Forms

Documents

Content

Notifications

Brands

Workflows > Privacy Policy

Launch

Test

Export

Edit

Save

Participant Setup

Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
Signer 1	Full Name entered at launch...	Email Address entered at launch...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div><div></div><div></div></div>

+ Add Participant

+ Add Me

+ Add Advanced

Document Setup

Documents uploaded must match the exact file name set.

Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
1	MyCompany_NDA.pdf	MyCompany_NDA.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div><div>Tag Document</div><div>1</div></div>	<div><div></div><div></div></div>
2	Sample Document	Sample Document.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div><div>Tag Document</div><div>1</div></div>	<div><div></div><div></div></div>
3	Blank Template	Blank Template	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div><div>Tag Document</div><div>1</div></div>	<div><div></div><div></div></div>

✓ Add Document(s)

Release Notes

Workflow Templates > Launch Test Edit

Privacy Policy

1 **Document Options**

Required documents will automatically be checked. If you upload a document that matches the document file name, the checkbox will automatically be selected.

Included Documents:

- ☒ MyCompany_NDA.pdf
- ☒ Sample Document (required)
- ☐ Blank Template

2 **Multiple Document Uploads**

Upload the selected or required document(s).

Note: Documents can be uploaded individually or as a zip file.

Drag & Drop your files or Browse

- MyCompany_NDA.pdf (63 KB) [X]
- Sample Document.pdf (36 KB) [X]

3 **MyCompany_NDA.pdf**

If documents match the exact file name set, a **Completed** upload status will be shown.

Sample Document

Upload Status: **Completed**

Upload Status: **Completed**

Start Workflow →

[PEP-7479] - Added the ability to collect the Participant's Signing Location on the Signer Information page that can also be used in Signature Block Data stamped on the document with the signature. Please see the images below for the settings referenced.

Edit Participant Details

Workflow Rules

Custom Exit Url:

Custom Session Timeout Url:

☐ Allow participant to reassign tasks to a different person if necessary.

Verify/Query for:
NOTE: these may be automatically queried for if a participant's tasks requires this data.

- ☐ Full Name
- ☐ Initials
- ☐ Email Address
- ☐ Title
- ☐ Organization
- ☒ Signing Location
 - ☒ City
 - ☒ State/Prov
 - ☒ Country

Document Access Window:

Release Notes

MyCompany, Inc.

Signer Information

Please enter or confirm the information requested below exactly as you would normally write it when signing a paper document (including appropriate upper and lower case) and then continue to view the document you are requested to sign. You may then choose to sign it or not.

Signing Location:

Continue

v5.18.0.0

Tasks Editor

Signature 1

Enable DocForms

MyCompany NDA

Task Placement

Signature

Initials

Approval

Add Signature Block Data

Printed Name

Signature Date

Title

Organization

Email Address

IP Address

Document ID

Task ID

Signing Location

Custom Text

Lorem ipsum dolor sit amet, consectetur adipiscing elit

Vivamus commodo lacinia mollis. Aenean ut tellus vestibulum, molestie urna eu, facilisis eros. Quisque aliquam, nisi sit amet pretium posuere, sapien ex eleifend lacus, a pellentesque lectus velit sit amet diam. Praesent imperdiet leo quis hendrerit consectetur. Phasellus lacus felis at risus dictum blandit. Quisque libero velit, scelerisque nec augue a, convallis consequat metus. Duis feugiat sed risus imperdiet venenatis. Praesent et vestibulum leo. Nulla rhoncus tristique orci non vestibulum. Aenean sagittis, dolor vitae maximus pharetra, ligula purus molestie justo, a maximus sem dolor vitae nulla. Etiam scelerisque enim id ligula laoreet dictum sit amet quis ex. Sed tellus risus, consectetur at sodales sed, lobortis sed massa. Vivamus volutpat sit amet ante rutrum ultrices. Suspendisse porta purus turpis, vitae congue neque eusmodi a. Sed commodo odio ac felis suscipit feugiat. Suspendisse potenti.

Integer convallis, felis tempus euismodi accumsan, lorem enim vehicula mauris, vitae accumsan eros justo eu augue. Vivamus sollicitudin lacus at nisl fringilla, sit amet bibendum metus vestibulum. Proin pellentesque auctor aliquam. Proin dignissim, nulla vestibulum aliquet pharetra, velit est ultrices tortor, id congue nes turpis gravida lacus. Fusce commodo risus sed nibh luctus, maximus eusmodi ex auctor. Donec libero ante, dignissim quis maximo vitae, finibus ac augue. Etiam auctor nec sem eu mattis. Quisque rutrum justo id mollis efficitur. Proin id accumsan nunc.

Aliquam erat volutpat. Ut ante purus, faucibus nec rutrum eget, finibus vitae mauris. Integer tristique, magna quis ullamcorper scelerisque, enim ex vestibulum tortor, eget dapibus ipsum augue non erat. Nunc commodo vehicula hendrerit. Duis in nisl ac lectus vestibulum venenatis quis quis sem. Integer. Integer odio, lincidunt fringilla libero ultricies, ornare ullamcorper dolor. Pellentesque accumsan malesuada ullamcorper. In aliquam sagittis risus, eget elementum nunc feugiat eu. Sed in maximus nunc, quis vulputate mauris. Suspendisse auctor suscipit ex id blandit.

Praesent scelerisque sem ac imperdiet ornare. Sed dignissim erat lacina, sagittis turpis et, mollis diam. Nullam gravida eusmodi nulla malesuada mollis. Fusce arcu nris, fermentum ut semper in, bibendum quis justo. Proin neque tortor, cursus eget lincidunt in, scelerisque vitae velit. Cras arcu leo, suscipit vel orci id, dictum consequat massa. Curabitur posuere ante justo, id sculis ex fermentum vel. In convallis lectus et fides volutpat, eu sollicitudin erat imperdiet. Integer id congue dolor.

Internal Approver Initials:

Signature: [Signature]

Printed Name: [Name]

Sig Block Data Options

Data Type:

Signing Location

Font:

Helvetica

Color:

Blue

☒ Include City

☒ Include State/Prov

☒ Include Country

Edit More Data Item Properties

Clone Data Item

Delete Data Item

[PEP-7448] - Added the ability to enable bulk document uploads in which the system will match files based on file name or custom regex set. Please see the images below for an example and the settings referenced.

Release Notes

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Launch Rules

☒ Publish this Workflow as launchable template.

☒ Allow users in this Group to launch this Workflow.

☐ Allow users in all Sub Groups in this account to launch this Workflow.

☐ Allow the Workflow launcher to add additional/unique email addresses at the time of launch.

☐ Allow this Workflow to be launched publicly with no authentication required.

☐ Allow the launch form to use the full page width (default is centered).

☐ Allow the Description to be edited at the time of launch.

☒ Allow Multiple Document Uploads

☐ Enable Bulk Launching

Edit Document Details

Basic Information

Workflow Rules

User Experience

Event Subscriptions

Metadata

Launch Rules

Replace Document

Launch Rules

☒ Require unique document upload at launch (do not use template on file).

☐ This Document is optional at launch.

☐ Allow the launcher to customize the document title.

☐ Allow the launcher to fill out document fields as "Launcher" Role.

Document Upload Match RegEx:

NDA

Save as Preset

Cancel

Update Document

dashboard / workflow templates

Quick Stats

Workflow Templates

Pending Signatures

Workflow Templates > Launch

Test

Edit

Privacy Policy

Signer 1

Full Name:

Jane Doe

Email Address:

jdoe@mail.com

Multiple Document Uploads

Document does not match RegEx requirements.

Drag & Drop your files or Browse

Sample Document.pdf

NDA.H.pdf

MyCompany NDA

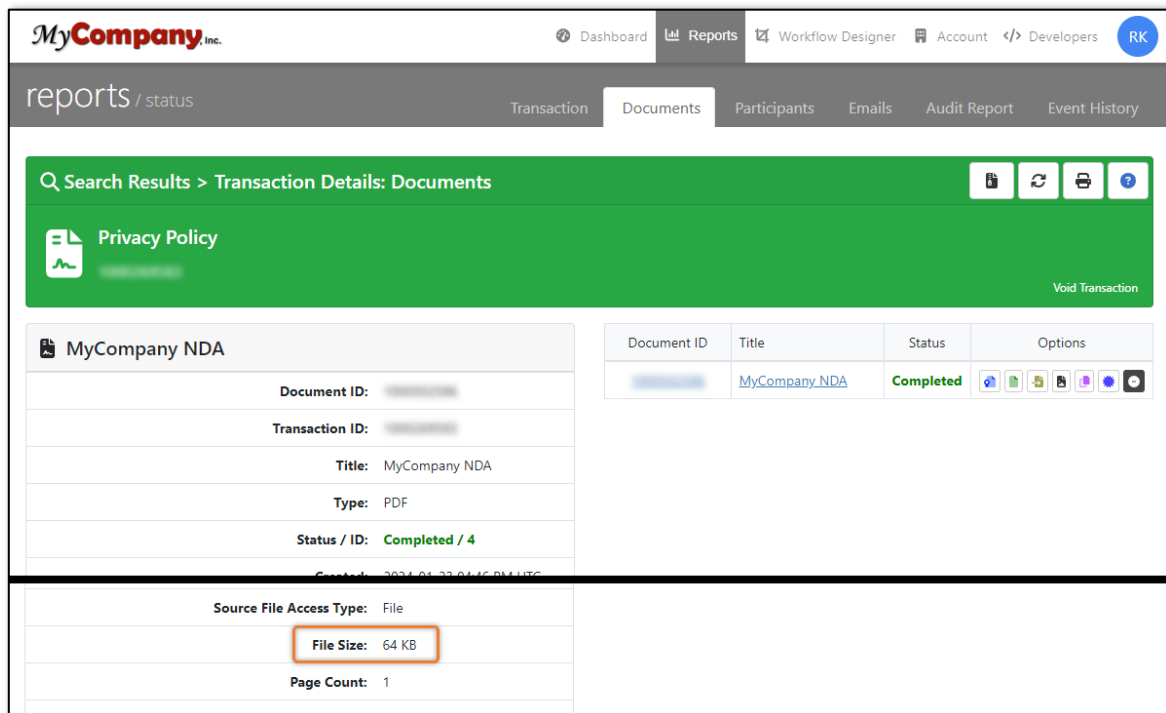
Upload Status:

Completed

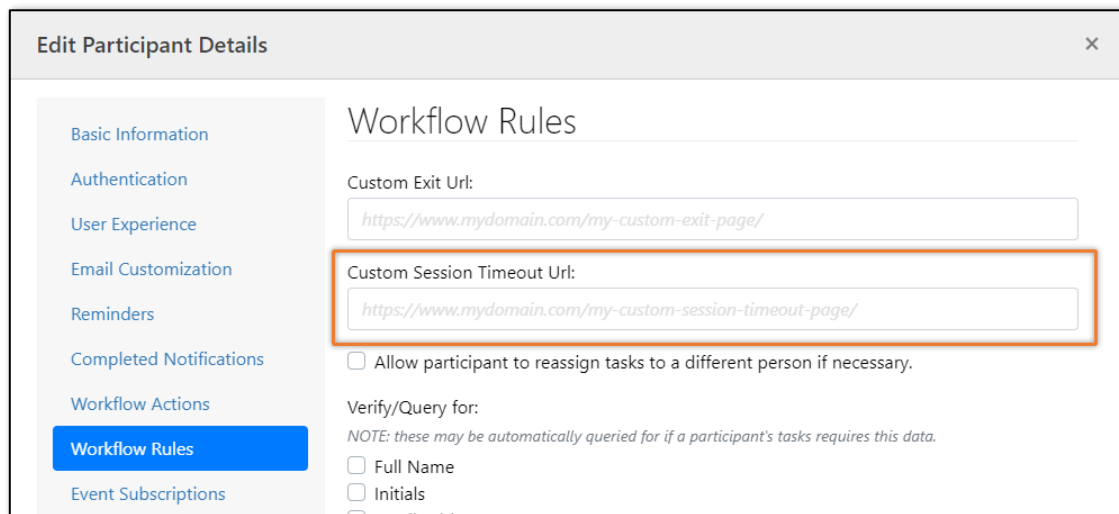
Start Workflow →

Release Notes

[PEP-7382] - Added Document File size to the Reports > Status > Transaction Details > Documents section. The value is based on the source document provided when the transaction was created. Please see the image below for an example transaction.



[PEP-7374] - Added an option to route a Participant to a 'Custom Session Timeout URL'. Added a *SessionTimeoutUrl* parameter to the Participant (Workflows and API) so the Participant can be redirected to a custom web page when their signing session expires. Please see the image below for more information.



[PEP-7307] - Added *Group Transactions* (transactions not created by you) and document download access options on permission sets for Reports. Also added the option to deny download access for system-wide or account-wide admins. Please see the images below for details on the settings referenced.

Release Notes

Add Permission Set

Permission Set

Name:

☐ System-Wide

☐ Account-Wide

☐ Share to all Sub-Groups (if applicable)

Allow Access to:

☐ Groups

☐ Users

☒ Reports

☒ Group Transactions

☒ Documents

☐ Workflow Template Launch

☐ Workflows

☐ Web Forms

☐ Document Templates

Access to transactions created in a Group (not created by the user).

Access to download documents.

Edit User

Basic Information

Organization

Username:

First Name:

Bob

Last Name:

Jones

Email Address:

bjones@mail.com

☒ System-Wide Admin

☐ Account-Wide Admin

☒ Allow Installation Tests Access

☒ Deny document download access without explicit permissions

Basic Information

Username:

First Name:

Bob

Last Name:

Jones

Email Address:

bjones@mail.com

☐ System-Wide Admin

☒ Account-Wide Admin

☐ Allow Installation Tests Access

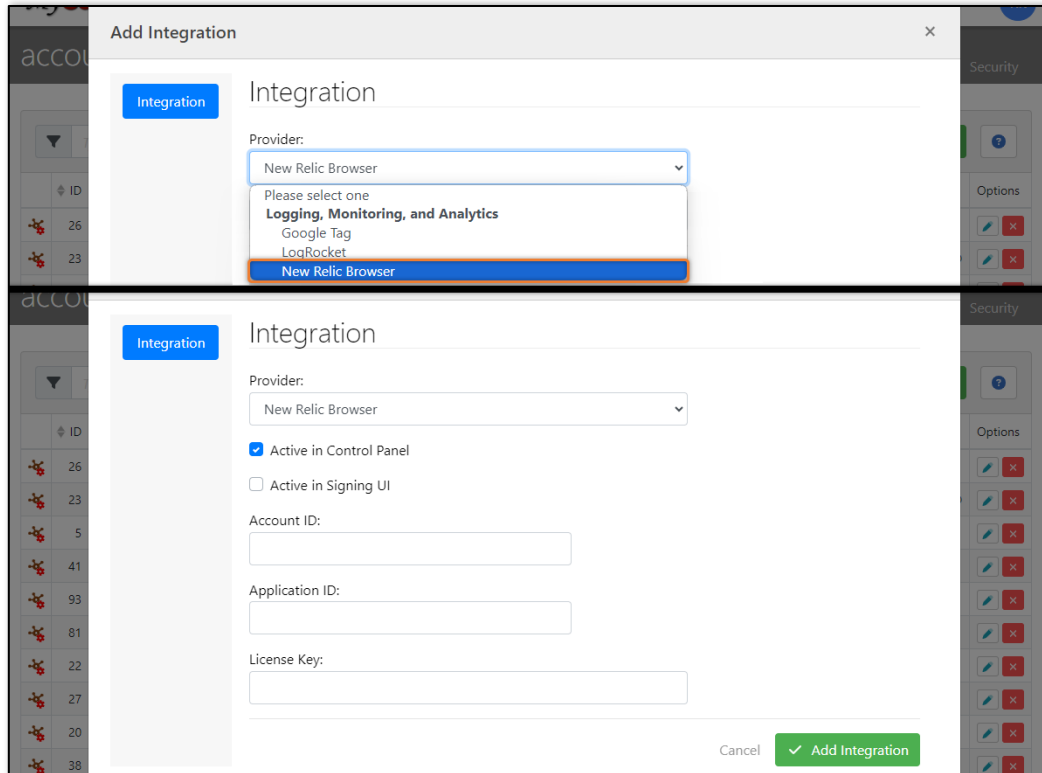
☒ Deny document download access without explicit permissions

Cancel

[PEP-7190] - Added *New Relic Browser* Integration. This integration adds additional monitoring and logging through New Relic. Please see the image and link below for more details.

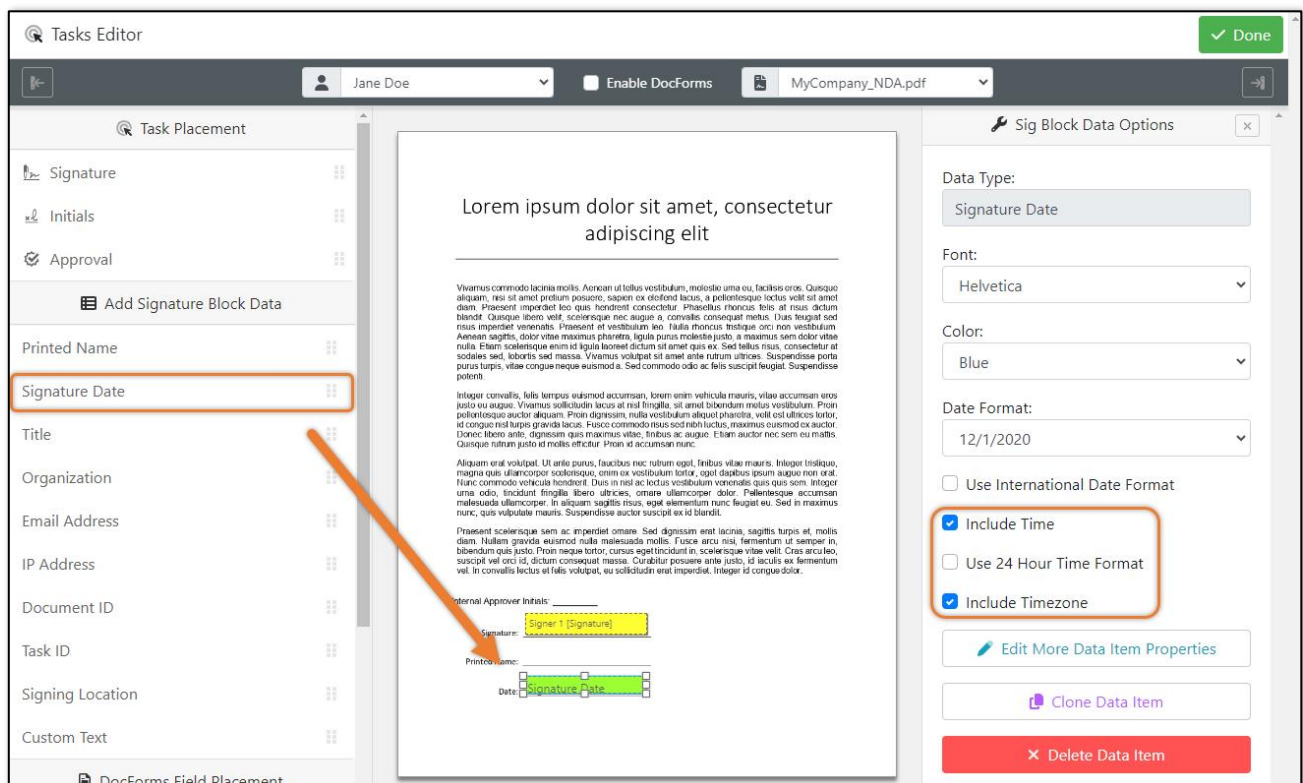
- New Relic Browser Monitoring Information: <https://docs.newrelic.com/docs/browser/browser-monitoring/getting-started/introduction-browser-monitoring/>

Release Notes



[PEP-7050] - Added the ability to specify and display the time zone to be stamped onto documents either via API or workflows. These updates include adding the following: *DefaultTimeZoneID* to the config, *TimeZoneID* property for API calls, the ability to include the Time Zone in Signature Block Data *Signature Date*, and the ability to set the Default Time Zone for a Group. Available Time Zones options can be found in the developers guide:

<https://developers.alphatrust.com/documentation/references/time-zone-ids.html>. Please see the images below for the settings referenced.



Release Notes

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

User Experience

Notification Set:
None (Use Default Notification Set)

Notification Language:
None (Use Default Language)

Public Launch Brand:
None (Use Default Branding)

Default Time Zone:
-- Use Default Group Time Zone --

☐ Prompt Participants for Cancellation Reason

Save as Preset

Cancel

Update Workflow

MyCompany

account / group

Groups > MyC

MyC

API Key (ProtolID):

Group Name:

Owner Name:

Owner Email Address:

Status:

Document Retention:

Session Expiration:

Password Change:

Content Set

Notification Set Use system default

Basic Information

Signature Chrome

Document Integrity

Security

Privacy Policy

User Experience

Logo

Multi-Factor Authentication

Email Services

User Experience

Brand:
-- Select One --

Content Set:
-- Select One --

Notification Set:
-- Select One --

Email Language:
-- Use Default Language --

Default Time Zone:
(UTC-05:00) Eastern Time (US & Canada)

Cancel

Update Group

[PEP-6939] - Added a link to the *Developers Guide* in the Developers section in the footer of the Control Panel. Please see the image below for more details.

Release Notes

[PEP-6708] - Added the ability to utilize archive storage including AWS S3 Storage. These settings can be found in the config under *ArchiveSettings*. Please see the image below for an example.

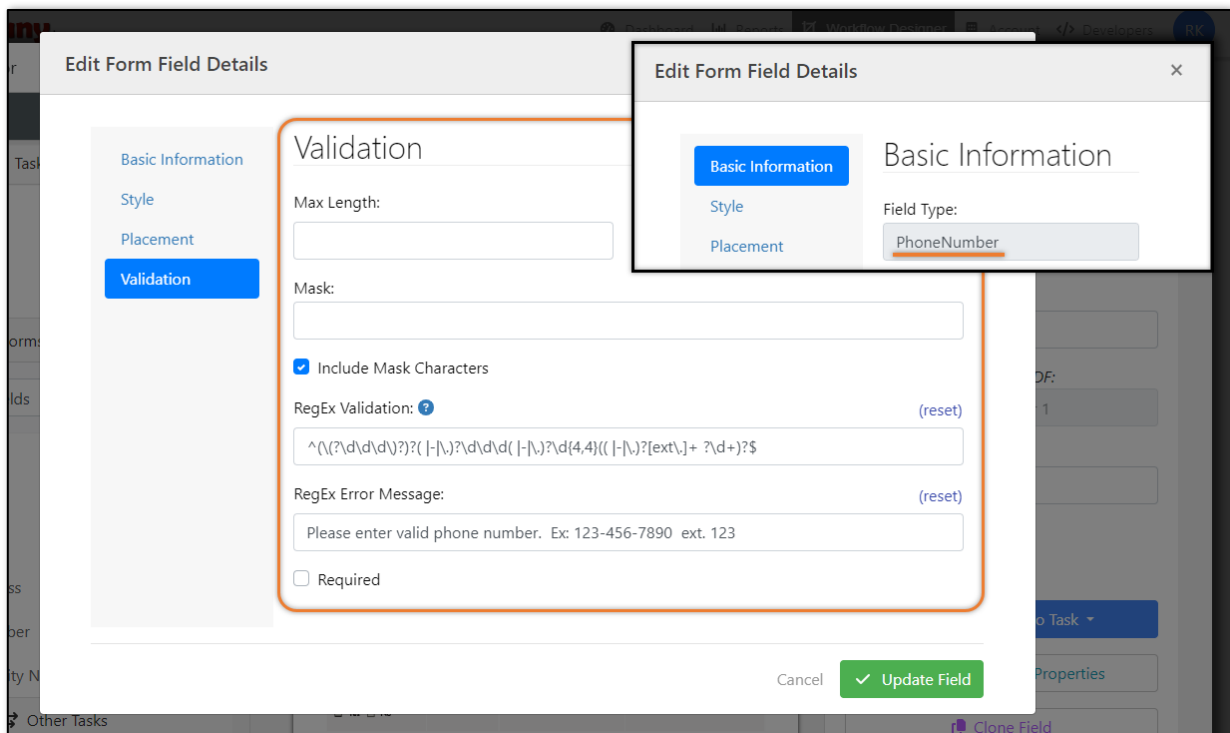
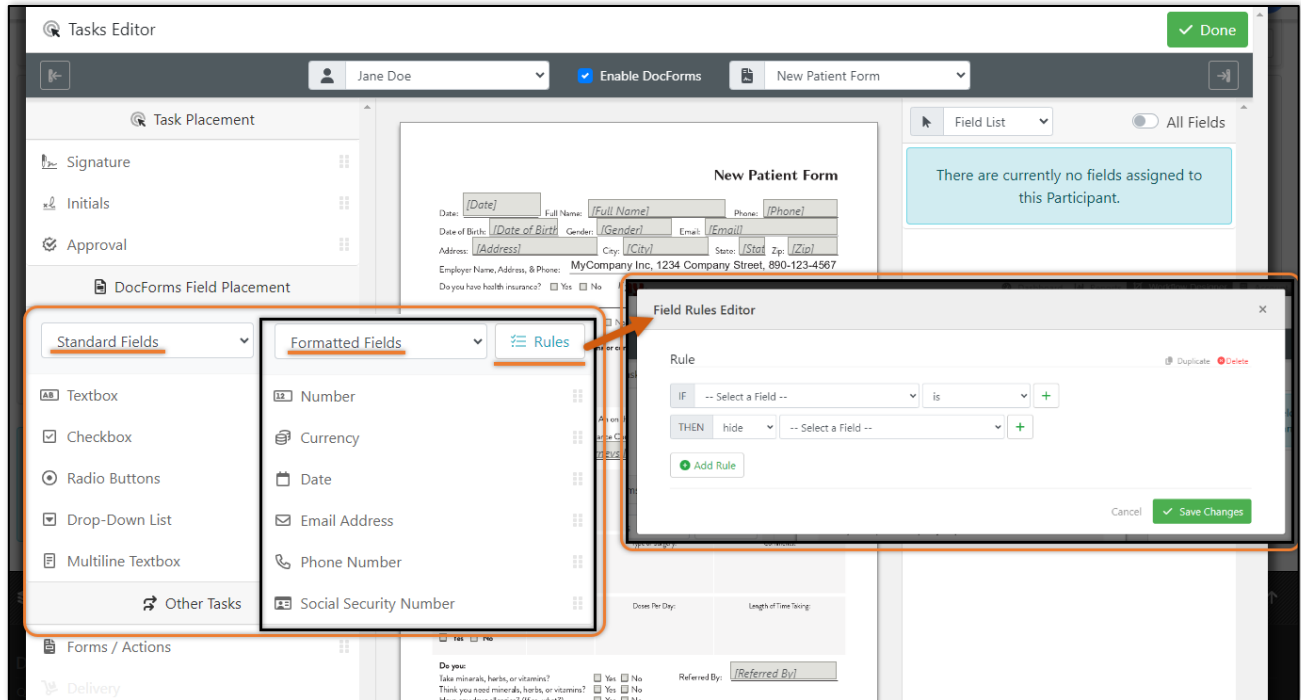
```
"ArchiveSettings": {  
  "DaysAfterComplete": 7,  
  "EarliestStartTime": "22:00",  
  "IsActive": false,  
  "LatestEndTime": "04:00",  
  "Location": "",  
  "LockDurationInDays": 0,  
  "MaximumAttempts": 0,  
  "MaximumConcurrentOperations": 0,  
  "MaximumRowsToFetch": 0,  
  "SleepDelayInMinutes": 0  
},
```

[PEP-6570] - Added *Read-Only* field type to Web Forms. This field type cannot be edited by any participants in a transaction. Please see the image below for additional details.

The screenshot displays the 'MyCompany Inc.' Workflow Designer interface. The top navigation bar includes links for Dashboard, Reports, Workflow Designer (active), Account, and Developers. The main header shows 'workflow designer / web forms' and tabs for Workflows, Web Forms (active), Documents, Content, Notifications, and Brands. The left sidebar, titled 'Add Fields', lists various field types: Grouped/Misc. Fields, Name, Address, Hidden, Separator, Text, and Read-Only (highlighted with an orange border). The main workspace shows a 'Web Form' configuration for 'My Untitled Form'. It includes a 'Test' button, a 'Device' icon, and buttons for 'Export', 'Rules', 'Edit', and 'Save'. The form preview area contains a title 'Web Form', a subtitle 'This is my form. Please fill it out.', an 'ID Number' input field, a 'Read-Only' field (highlighted with a blue background and 'Edit' button), and 'Save and Continue' and 'Exit' buttons at the bottom.

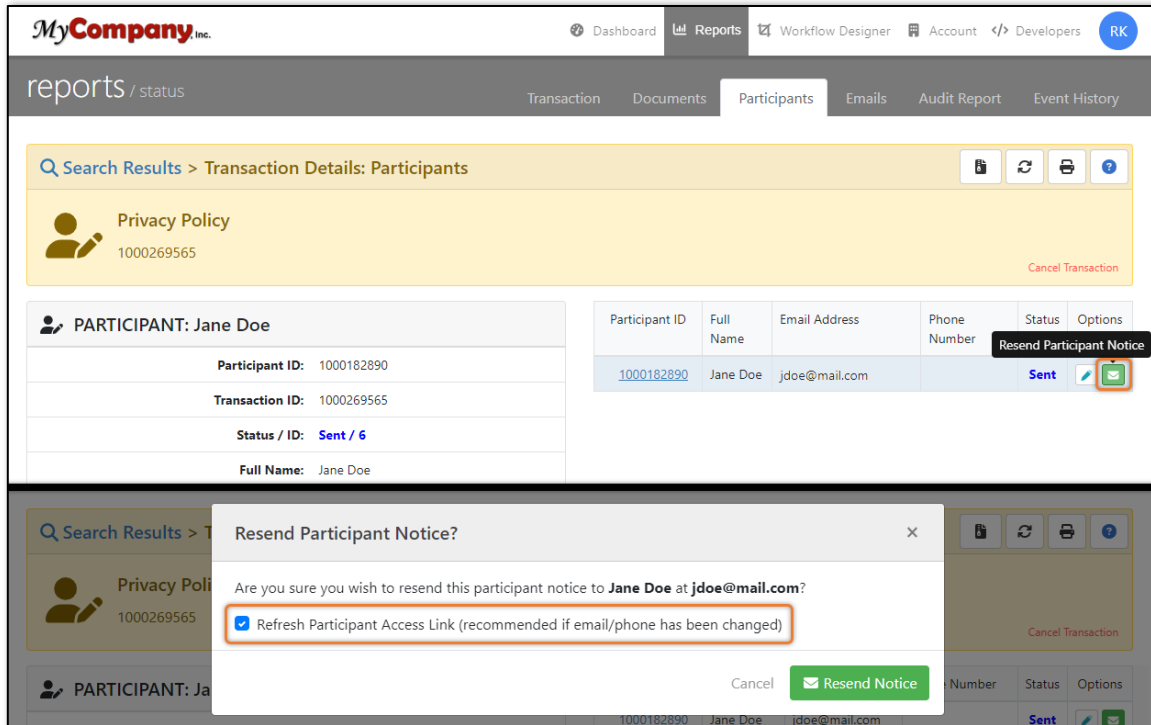
[PEP-6262] - Added validation options into DocForms. This includes the following: added support for rules via API, the ability to insert specialized field types onto a DocForm, the ability to manage DocForm validation properties, increased validation rules when editing DocForm fields, and the ability to manage Rules for inputs in DocForms. Please see the images below for the settings referenced and an example of field validation.

Release Notes



[PEP-6150] - Added the ability to refresh the participant access link when resending the notification from the Reports > Status > Transaction Details > Participants section. This will allow the user to update the Participant information and resend the Participant Notice with a new link. This new feature will also invalidate the original signing link once the new link is sent. Please see the image below for more details.

Release Notes



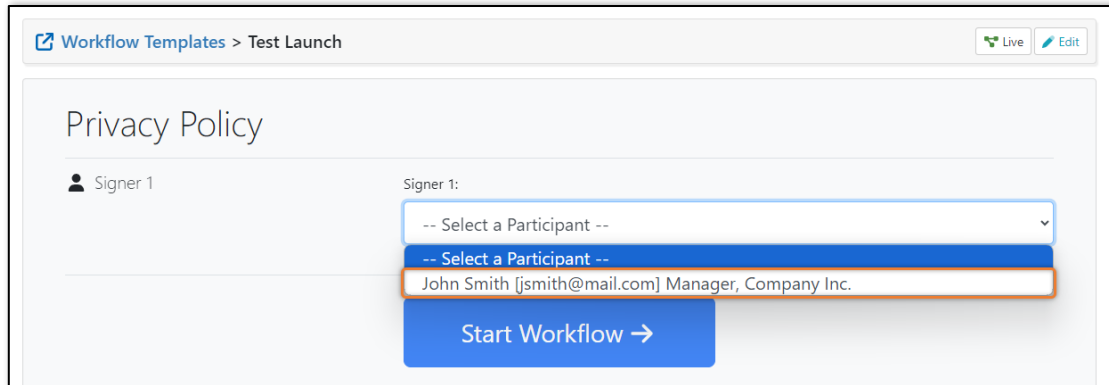
Improvements

[PEP-7600] - Improved HSM failure handling and fixed issue where completed email messages were not being sent when a transaction was completed.

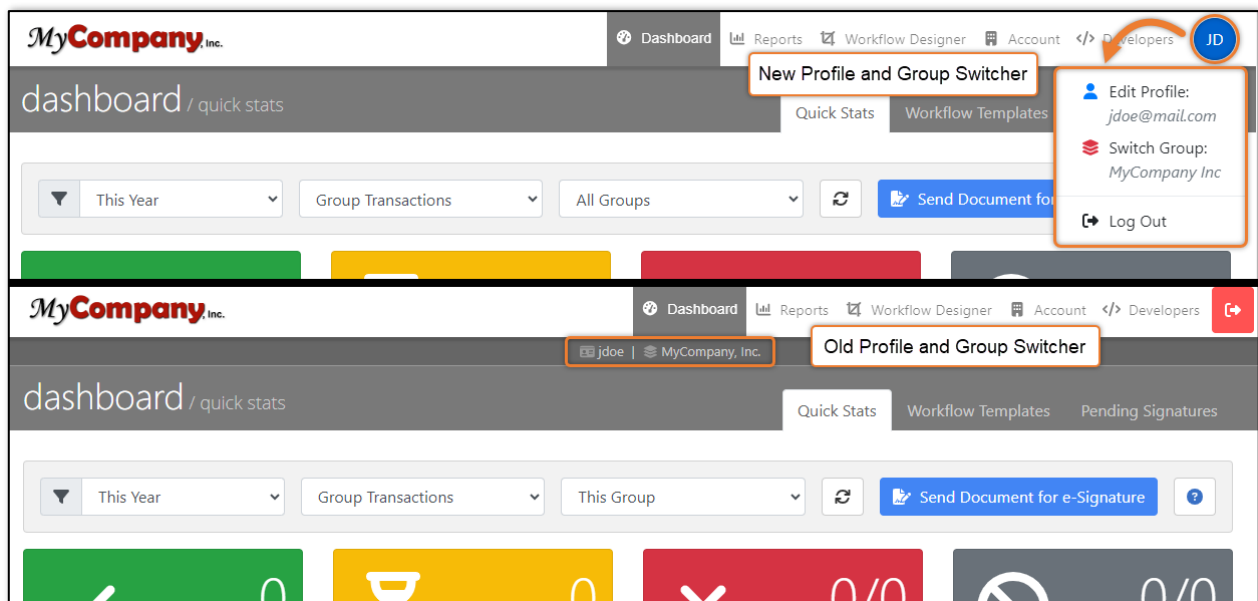
[PEP-7499] - Improved the drop-down options for Participant selection. Added Email Address, Title, and Org to participant selection list on the Launch page. Please see the images below for more information and an example.

The screenshot shows the 'Edit Participant Details' dialog box, specifically the 'Launch Rules' section. The dialog has a sidebar with various tabs: Basic Information, Authentication, User Experience, Email Customization, Reminders, Completed Notifications, Workflow Actions, Workflow Rules, Event Subscriptions, Placeholders, PDF Fields, Launch Rules (selected), Launch Display, Launch Domain Restrictions, and Launch Labels. The 'Launch Rules' section contains a checkbox for 'This Participant is optional at launch.' and a dropdown for 'Input Type: Launcher will select from a list of options (specified below)'. Below this, there is a 'Selection Option 1' section with fields for Name (John Smith), Email Address (jsmith@mail.com), Phone Number (1597534862), Title (Manager), and Organization (Company Inc.). A callout box points to these fields, stating 'Information included in Participant drop-down selection.' At the bottom, there are buttons for 'Save as Preset', 'Cancel', and 'Update Participant'.

Release Notes



[PEP-7365] - Improved the Profile and Group Switcher by consolidating and moving the Profile and Group Switcher links to a standard Account Button. Please see the image below to compare the old and new Profile and Group Switcher.



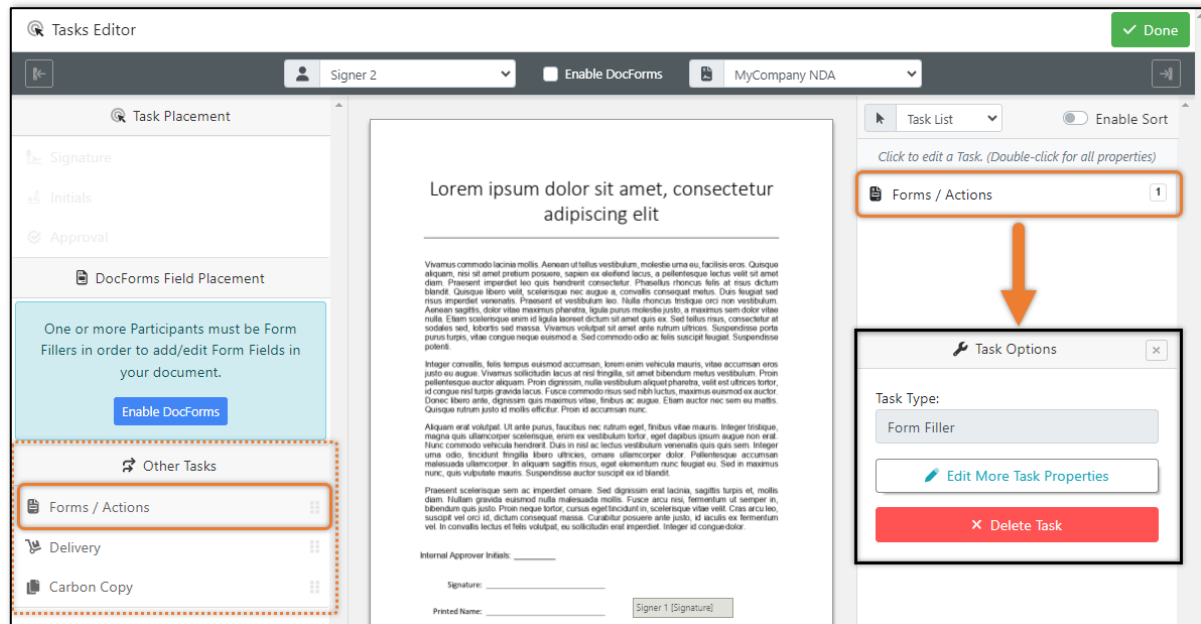
[PEP-7356] - Improved the Participant's organization name by increasing the character limit for the organization on Participants and Users from 64 to 128.

[PEP-7352] - Improved webhooks by adding the ability to include custom header information in Event Subscription HTTP requests. Please see the example below for more information. Please see the example image below for more details.

```
    },
    "WorkflowActions": [
      {
        "Type": "ProcessExplanation"
      },
      {
        "Url": "https://google.com",
        "Type": "SubscribeToStatusChangeNotificationsByPost",
        "CustomHeaders": [
          {
            "Name": "Cache-Control",
            "Value": "no-cache"
          },
          {
            "Name": "Accept-Language",
            "Value": "en-US"
          },
          {
            "Name": "Accept-Charset",
            "Value": "utf-8"
          },
          {
            "Name": "My Custom Header",
            "Value": "My crazy value"
          }
        ]
      }
    ]
  }
```

Release Notes

[PEP-7282] - Improved the ability for a participant to form fill without needing another separate task by adding a *Forms / Actions* task type to the Workflow Designer > Workflow > Task Setup options. Also reorganized the *Delivery*, *Carbon Copy*, and the new *Forms / Actions* task types into their own section called 'Other Tasks' and moved them to the bottom of the list. Please see the image below for more details.

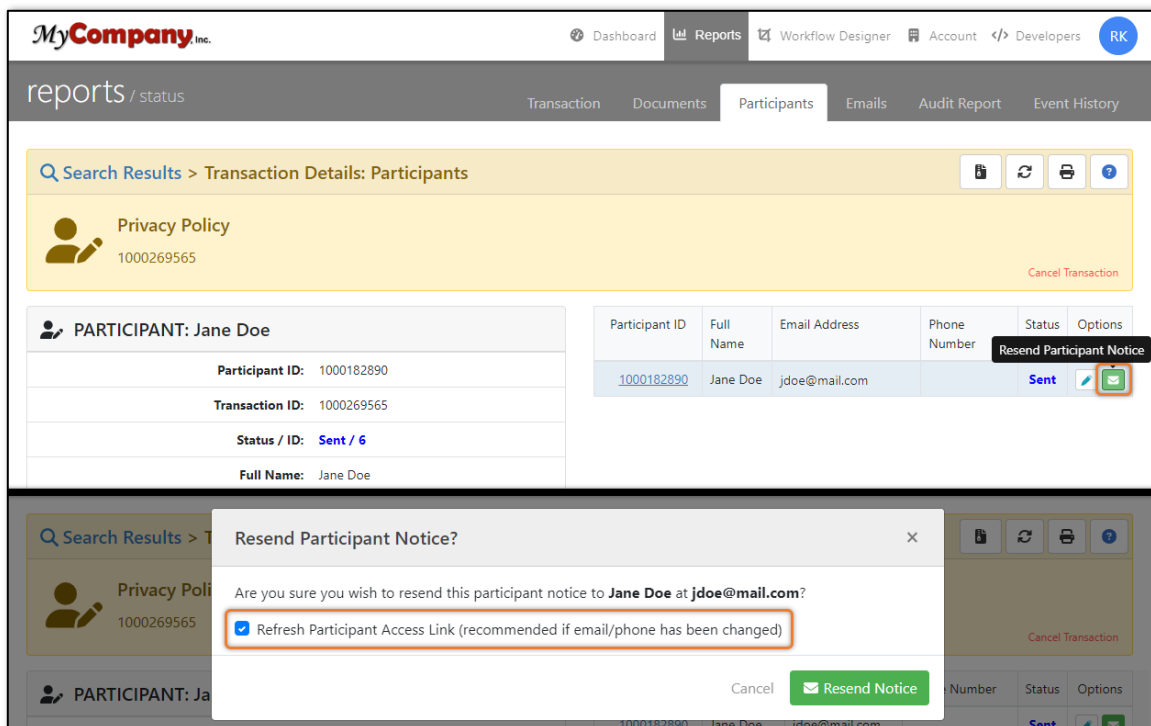


[PEP-7191] - Improved the precision of timestamps on filenames for JSON logs by adding seconds to the API JSON logs filename.

Current Filename Format: 'CreateTransactions-Request-<machinename>-yyyyMMddHHmm'

New Filename Format: 'CreateTransactions-Request-<machinename>-yyyy-MM-dd-HH-mm-ssSSS'

[PEP-7140] - Improved the resend participant option by adding the ability to refresh the participant access link when resending the notification from the Status Reports Participant section. Please see the image below for more details.



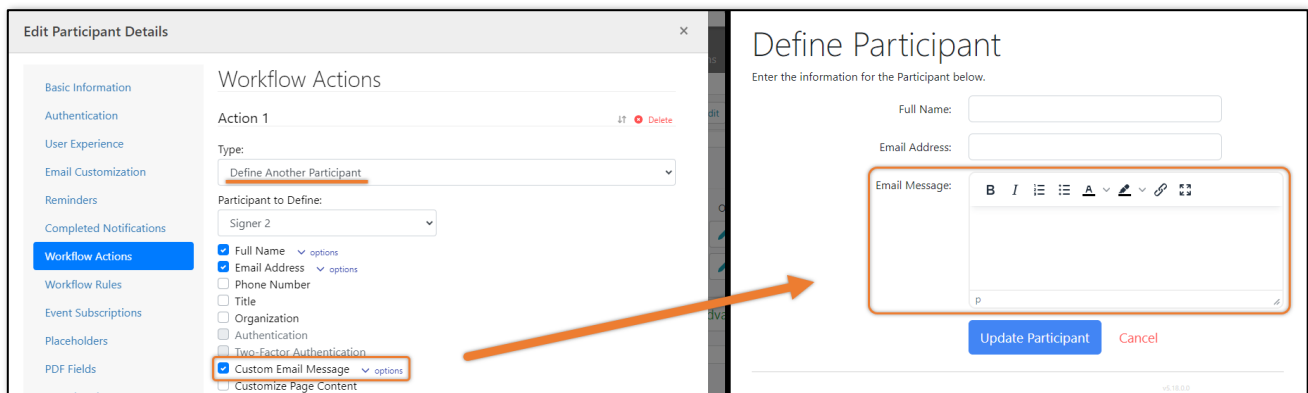
[PEP-7124] - Improved the installer so that it will not overwrite X-Frame-Options and Content-Security-Policy for CP, InstallationTests and Sign vue apps.

Release Notes

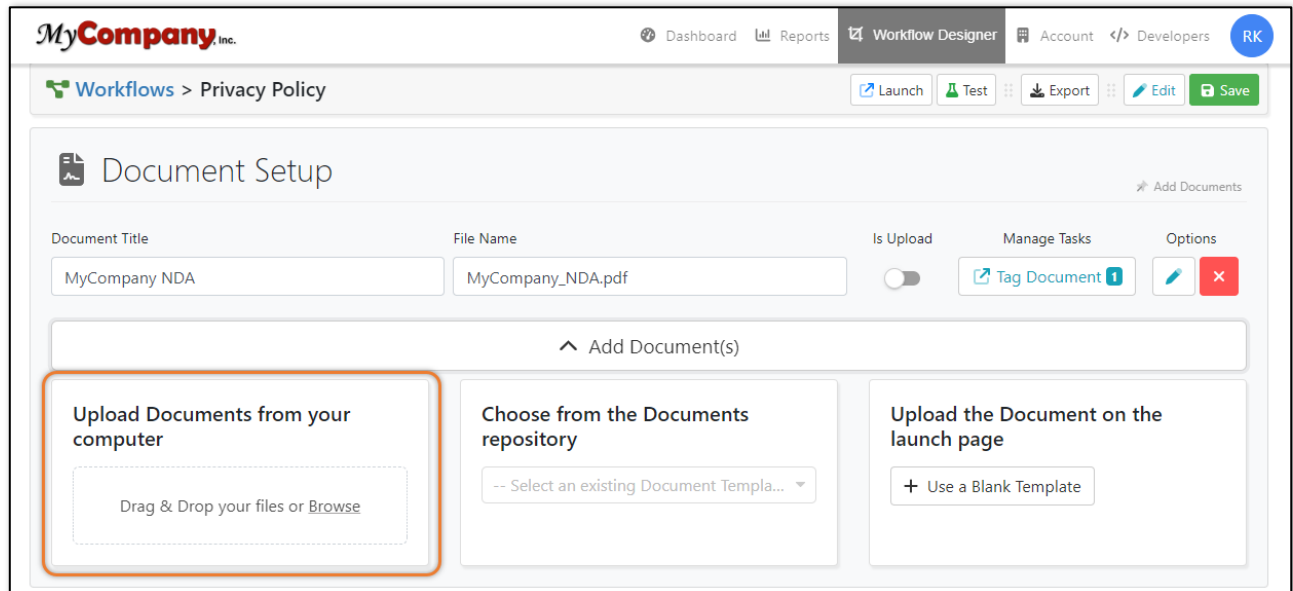
[PEP-6708] - Improved storage options by adding support for archive storage including AWS S3 Storage. These setting can be found in the config under *ArchiveSettings*. Please see the image below for an example.

```
"ArchiveSettings": {  
  "DaysAfterComplete": 7,  
  "EarliestStartTime": "22:00",  
  "IsActive": false,  
  "LatestEndTime": "04:00",  
  "Location": "",  
  "LockDurationInDays": 0,  
  "MaximumAttempts": 0,  
  "MaximumConcurrentOperations": 0,  
  "MaximumRowsToFetch": 0,  
  "SleepDelayInMinutes": 0  
},
```

[PEP-6615] - Improved the *Email Message* field on the Define Participant Workflow Action to use a rich-text editor instead of a plain text input box. Please see the image below for more details.



[PEP-5751] - Improved the document upload functionality by replacing (or adding to) the standard file upload controls with drag & drop file upload controls. Please see the image below for an example of the drag & drop file upload control.



Bug Fixes

[PEP-7578] - Fixed issue where an expired license was preventing the application and service from running properly.

[PEP-7577] - Fixed issue where checkboxes and radio buttons selected by a prior participant were hard to see when the next participant was signing. Read-only field data is now more clearly visible in the DocForms UI. Please see the image below for an example.

Release Notes

ATTENTION: Please make sure you fill out all of the form fields and then click the "Save & Continue" button.

Save & Continue →

Aenean sagittis, dolor vitae maximus pharetra, ligula purus molestie justo, a maximus sem dolor vitae nulla. Etiam scelerisque enim id ligula laoreet dictum sit amet quis ex. Sed tellus risus, consectetur at sodales sed, lobortis sed massa. Vivamus volutpat sit amet ante rutrum ultrices. Suspendisse porta purus turpis, vitae congue neque euismod a. Sed commodo odio ac felis suscipit feugiat. Suspendisse potenti.

Internal Approver Initials: _____

Signature: _____

Printed Name: _____

Date: _____

× ×

☒ ☐

The checkbox and radio button that the first participant selected are clearly marked.

[PEP-7576] - Fixed issue where HTML signings were not functional.

[PEP-7567] - Fixed issue where Web Form rules involving required fields logic would not compute properly. Please see the example image below for more details.

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers RK

workflow designer / web forms

Workflows Web Forms Documents Content Notifications Brands

Web Forms > My Untitled Form

Test Device Export Rules Edit Save

Add Fields

Standard Fields

Textbox

Multiline Textbox

Checkboxes

Dropdown List

Web Form

This is my form. Please fill it out.

ID Number:

Organization: -- Select an Option --

Manager: -- Select an Option --

Field Rules Editor

Rule 1

IF ID Number is blank

THEN require Organization

Rule 2

IF ID Number is not blank

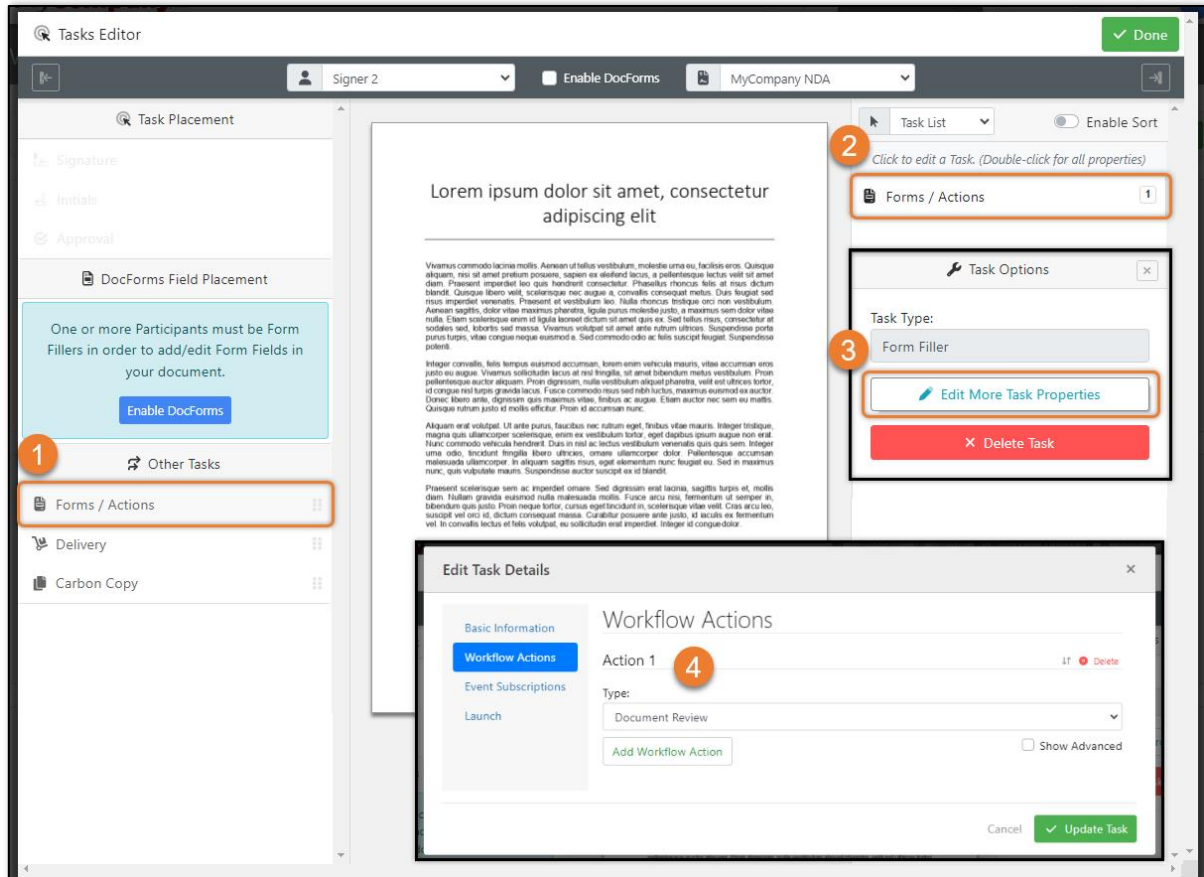
THEN require Manager

+ Add Rule

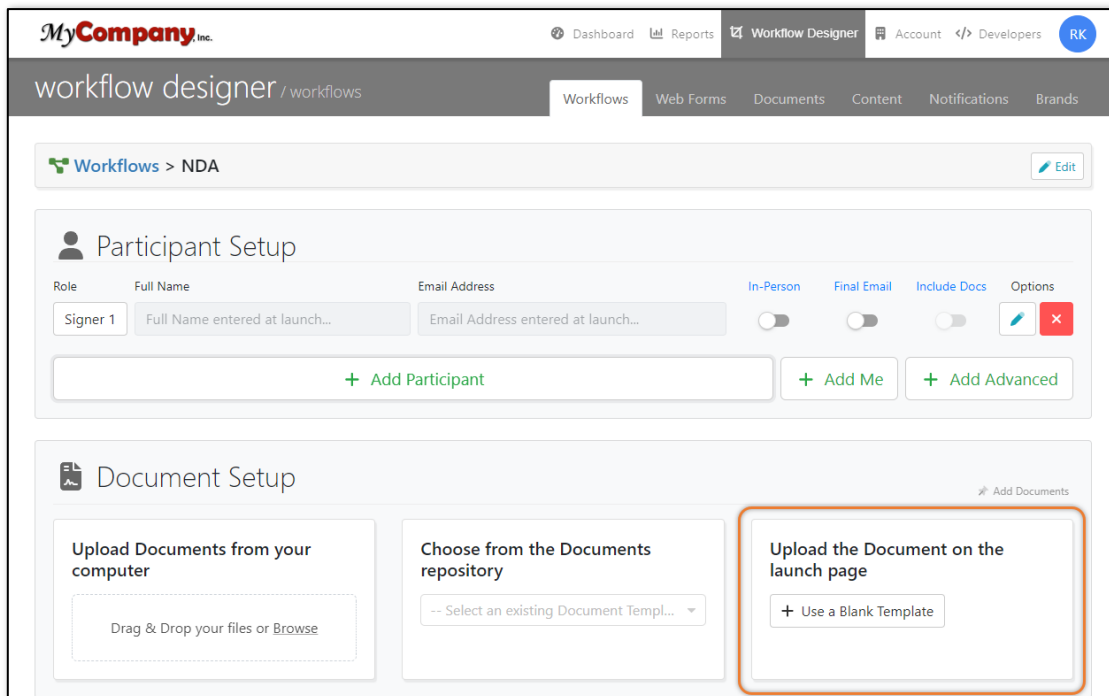
Cancel Save Changes

[PEP-7553] - Fixed issue where Task Workflow Actions would not properly save when adding them to a Forms / Actions task. Please see the image below for an example and the referenced settings and steps to add a Workflow Action to a Forms / Actions task.

Release Notes



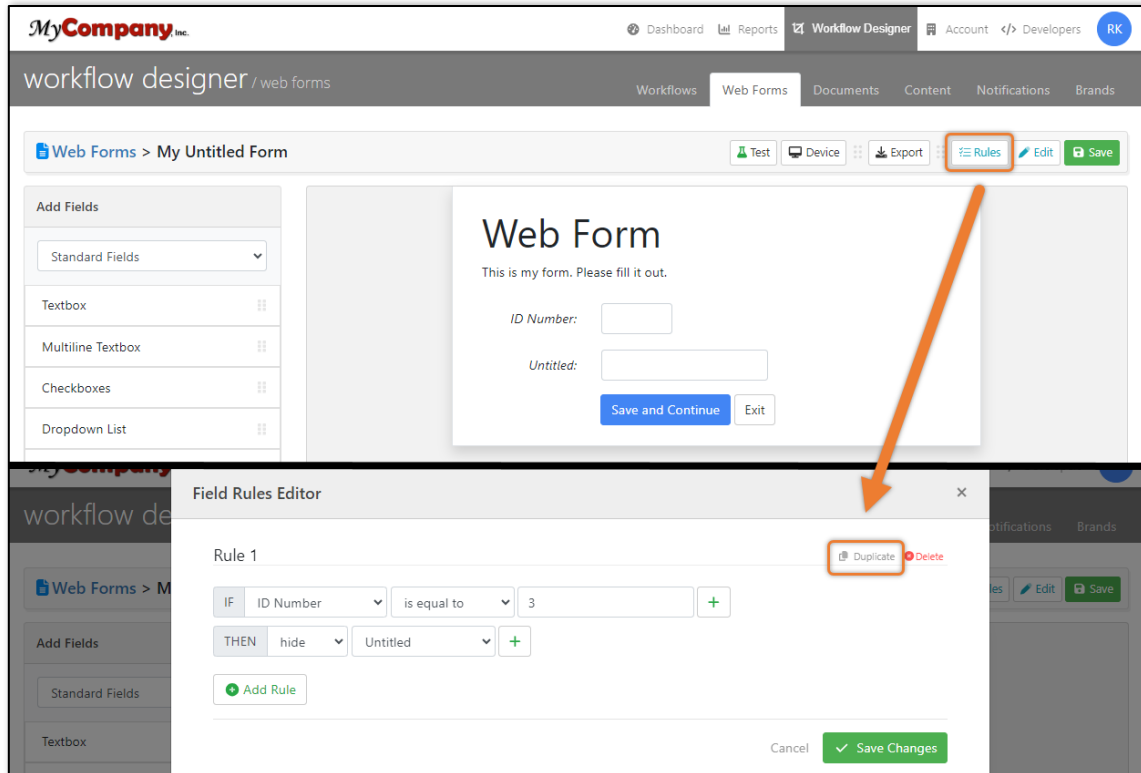
[PEP-7504] - Fixed issue where workflows with blank templates would not launch properly. Please see the image below for the setting referenced.



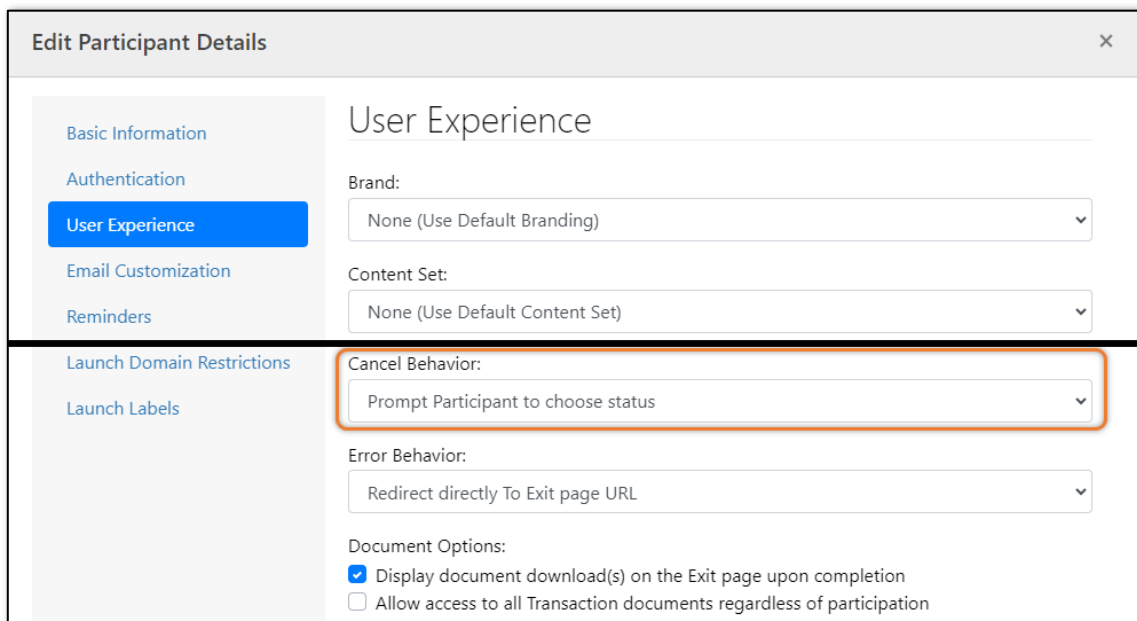
[PEP-7494] - Fixed issue where workflows that were exported with missing content sets would not import as expected.

[PEP-7486] - Fixed issue where when editing a duplicated rule, the original rule would also update. Please see the image below for the settings referenced.

Release Notes

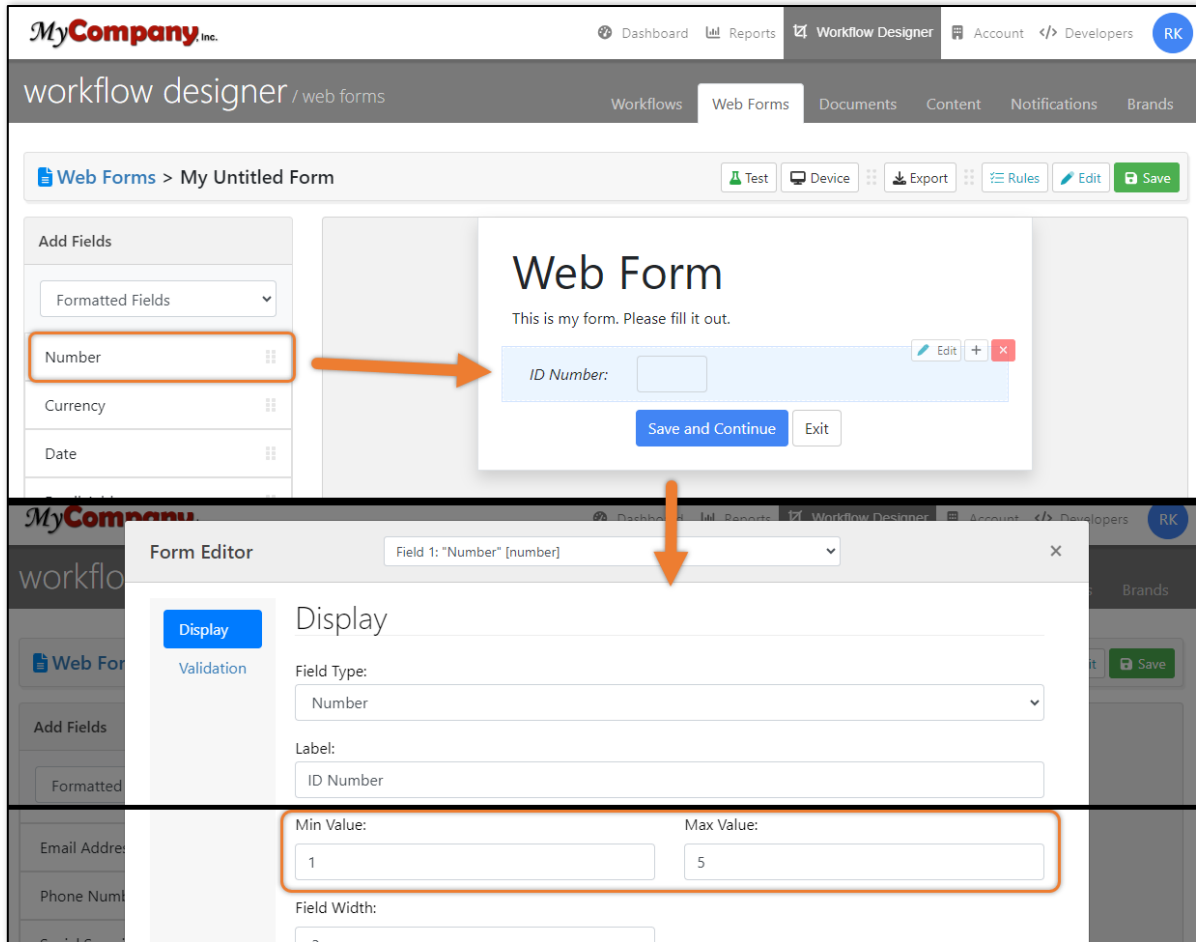


[PEP-7483] - Fixed issue where when using the *Prompt Participant to choose status* workflow action, the status would not update and the signing would be suspended instead of correctly prompting the participant to select the status. Please see the image below for the setting referenced.

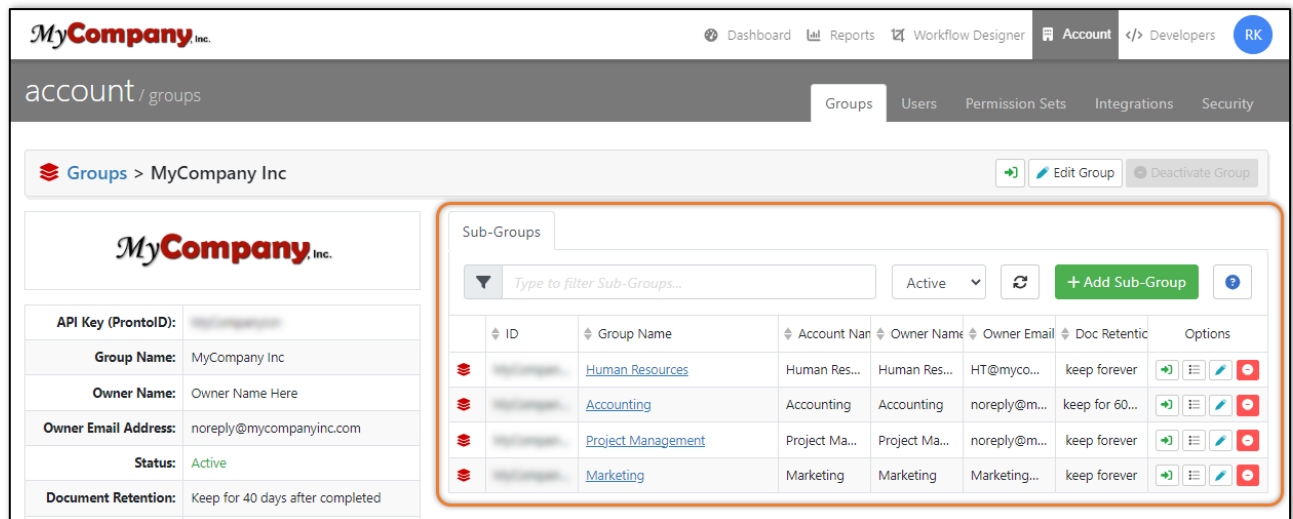


[PEP-7460] - Fixed issue where number fields in a Web Form would not properly validate the set min/max values and a user could type in a number higher or lower than the min/max values. Please reference the image below for an example.

Release Notes

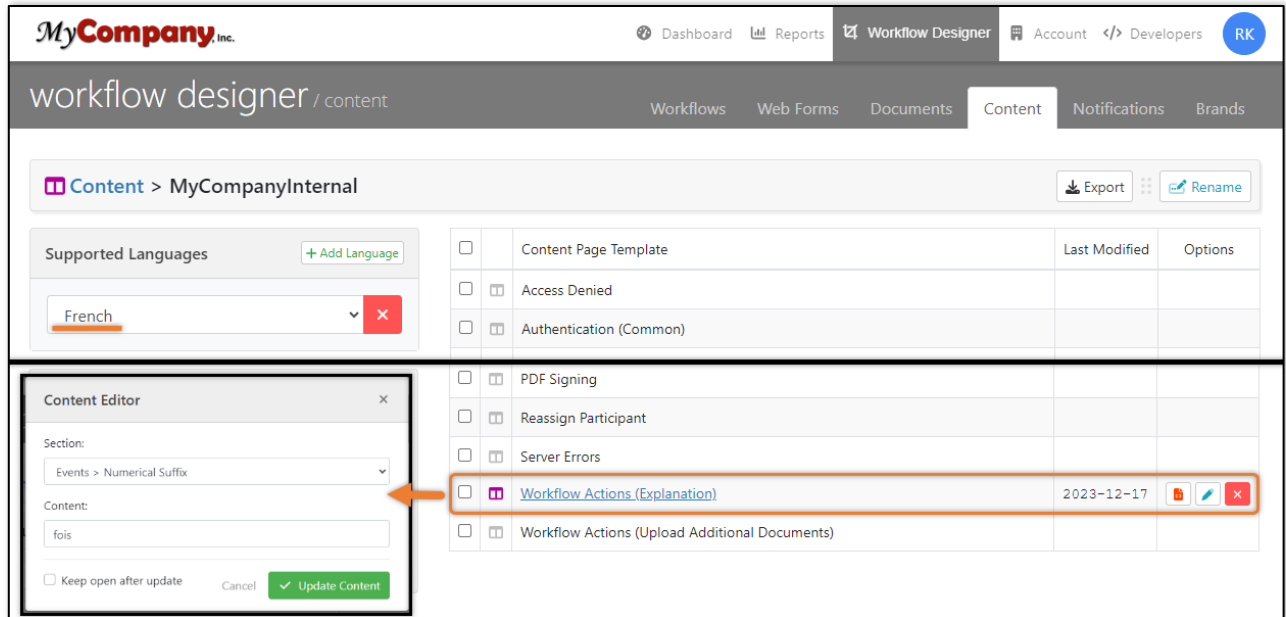


[PEP-7445] - Fixed issue where the Sub-Groups table would not resize in a responsive manner when a user zooms in on the screen. Please see the image below for the table referenced.



[PEP-7439] - Fixed issue where an incorrect French translation was seen in the default *Workflow Actions (Explanation)* Content Set. Changed the French translation from "heures" to "fois". Please see the image below for more details.

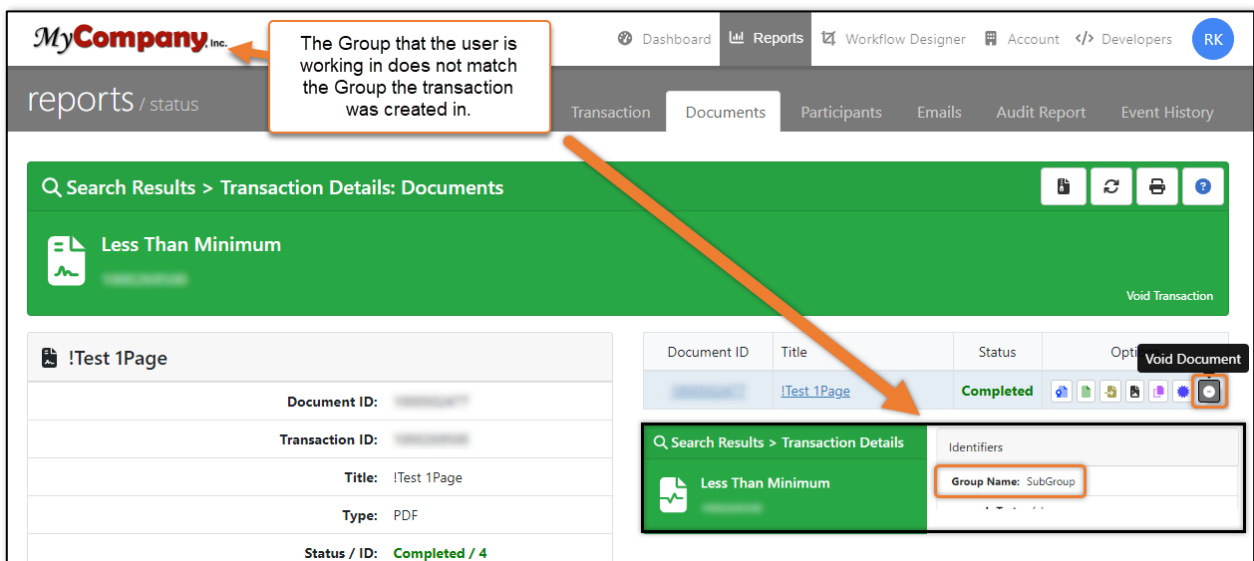
Release Notes



[PEP-7436] - Fixed issue where expiration notices were not being sent for expired transactions.

[PEP-7372] - Fixed issue where the failed login attempt status code could cause confusion when received. Changed failed login attempt status code from 400 to 403 to provide the forbidden response.

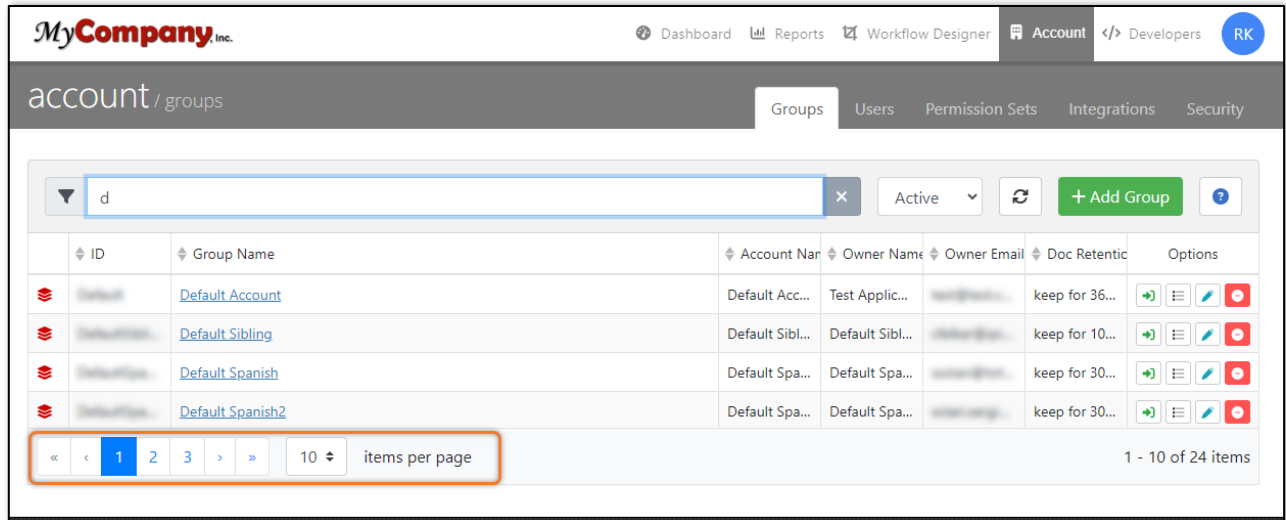
[PEP-7266] - Fixed issue where when attempting to void a document, in the Reports > Status > Transaction Details > Documents section, it fails when you are voiding a document that exists in a transaction that was created in a group that is other than the group the user is currently logged into. The document should successfully void since the user has permissions to both groups. Please see the image below for an example.



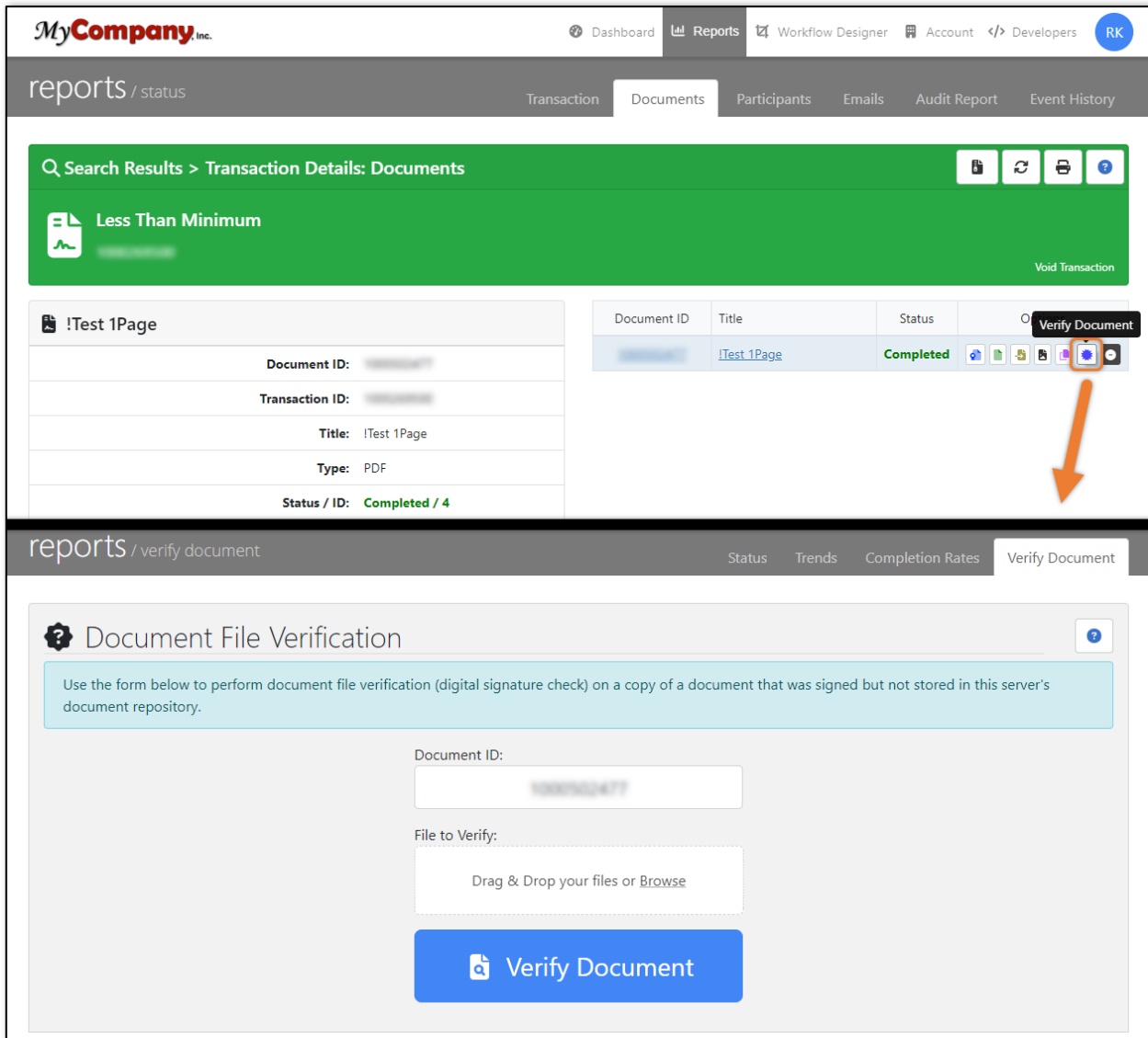
[PEP-7206] - Fixed issue where the AlphaTrust installer incorrectly configured the Startup Type for specific AlphaTrust services as 'Automatic' rather than the intended 'Automatic (Delayed Start)'.

[PEP-7026] - Fixed issue where the Groups page was missing the pagination bar when using the search filter. Please see the image below for an example.

Release Notes



[PEP-6927] - Fixed issue where HTML documents could not be verified in the control panel. Please see the image below for the referenced setting.



Release Notes

[PEP-2348] - Fixed issue where a Participant's suffix would appear as a digit instead of a Roman numeral when authenticating via Experian. Please see the images below for an example and reference to the integration setting.

Should be the Roman numeral 'III' and not the number '3'

Click Here to Sign

Signature

Name: Lee Kizer, 3

Title

Date: 9/23/2020

Identity Verification Required

Please fill out all the information below. NOTE: The address information is your

Legal Name

First Name: Lee

Middle Name:

Last Name: Kizer

Suffix: III

Add Integration

Integration

☐ System-Wide

☐ Account-Wide (shared to all other Groups and Sub-Groups if applicable)

Integration Name:

Provider:

Please select one

Please select one

Knowledge-Based Authentication

Experian PreciseID

Lexis Nexis

Required

Cancel AddIntegration

v5.17.14 Release

Release Date: 3/20/2024

Bug Fixes

Note: The update in version 5.17.14 is not included in versions 5.18.0 and 5.18.1.

[PEP-7718] - Fixed issue where a query for the Document Review page was running slowly. Updated a query to be more performant.

v5.17.13.1 Release

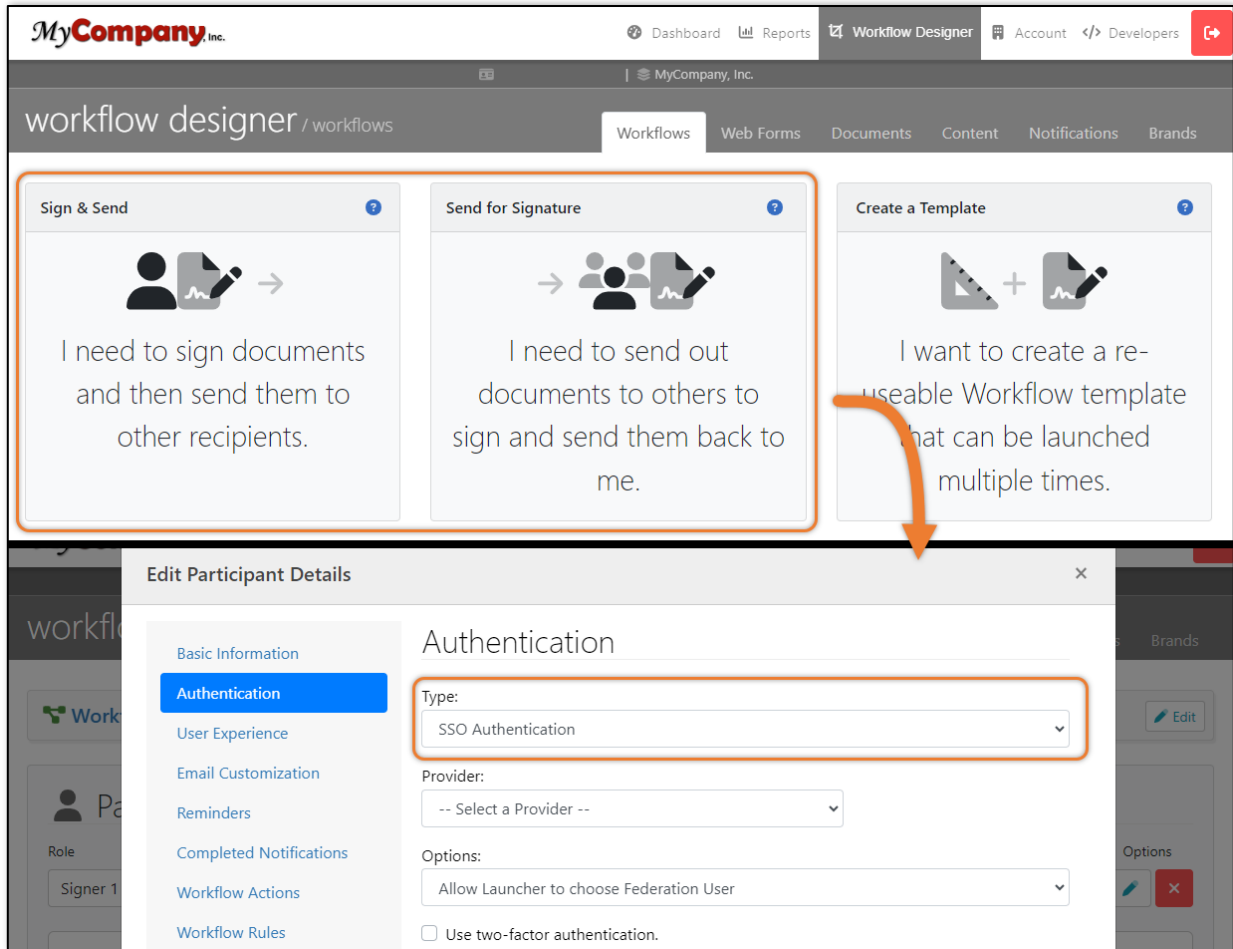
Release Date: 2/26/2024

Bug Fixes

Note: The update in version 5.17.13.1 is not included in version 5.18.0.

[PEP-7736] - Fixed issue where SSO logins would fail on a workflow when it is Ad-Hoc launched. The participant would see a "Process Cannot Continue" error when they opened the SSO link. Please see the image below for the referenced settings.

Release Notes

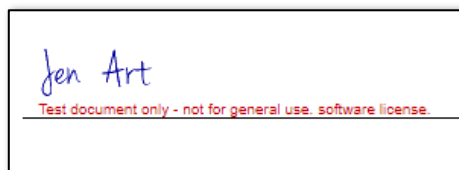


v5.17.13 Release

Release Date: 2/15/2024

Bug Fixes

[PEP-7672] - Fixed issue where the "Test Document Only" banner was being applied to HTML document transactions. Please see the image below for an example of the issue seen.



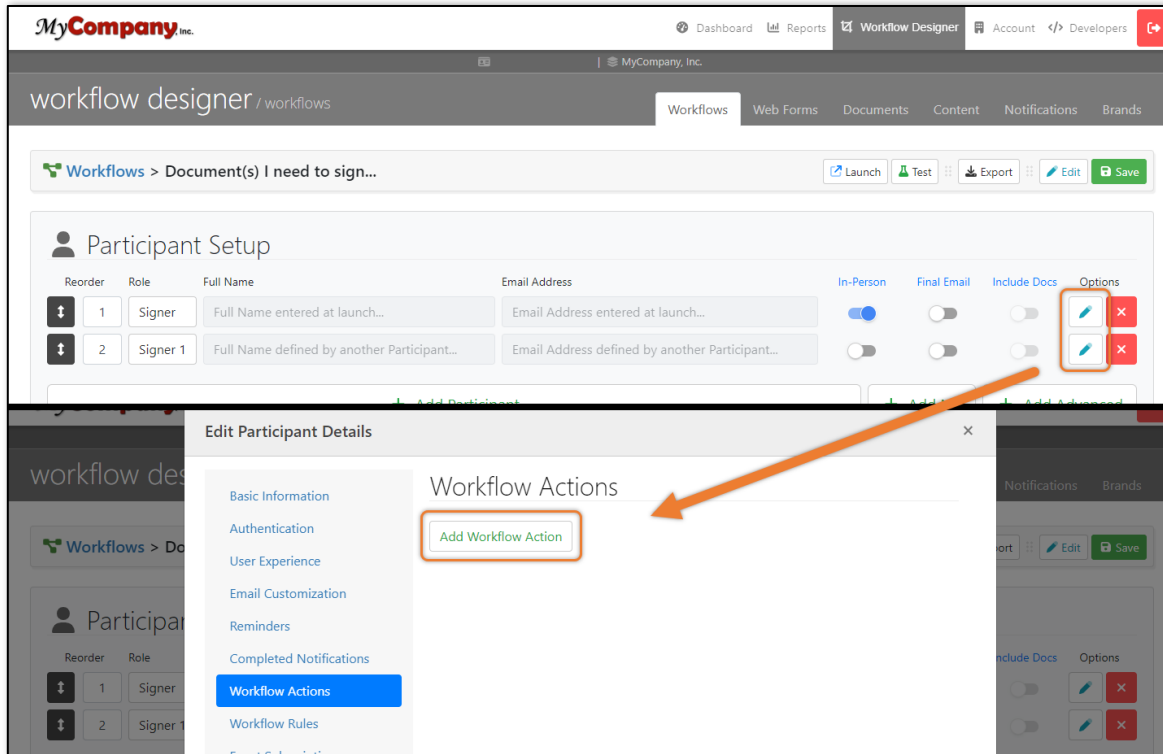
v5.17.12 Release

Release Date: 12/14/2023

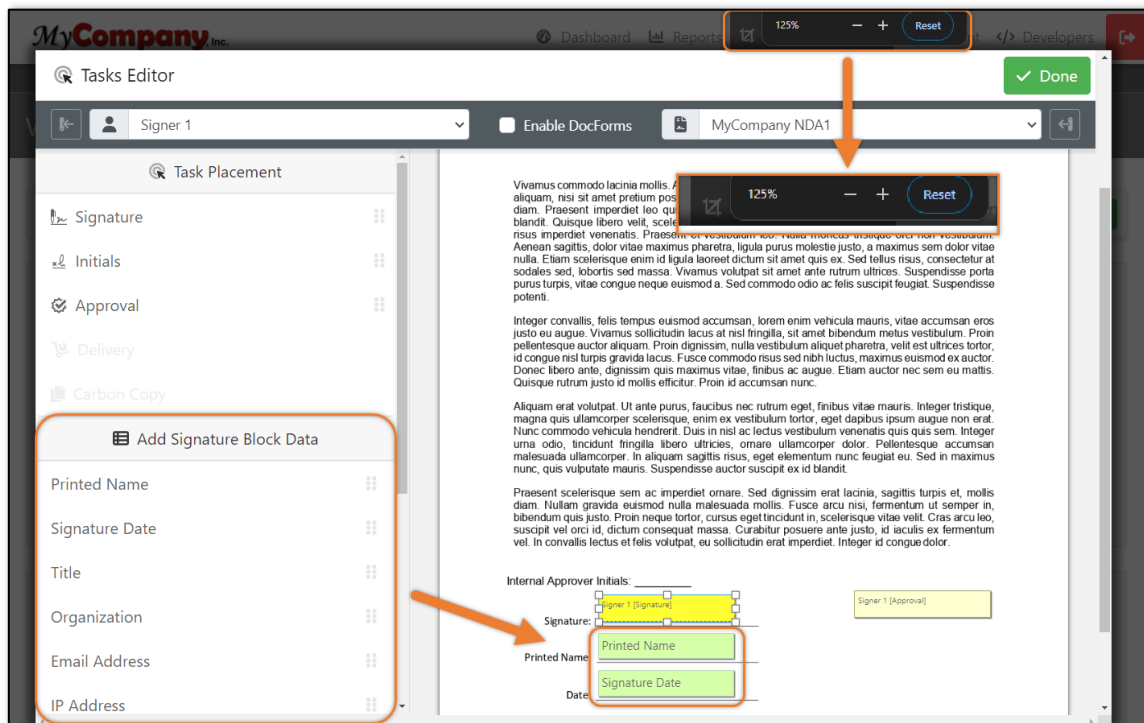
Bug Fixes

[PEP-7482] - Fixed issue where users were unable to add Workflow Actions to participants. When the user attempted to click on the *Add Workflow Action* button nothing occurred. Please see the image below for more details.

Release Notes

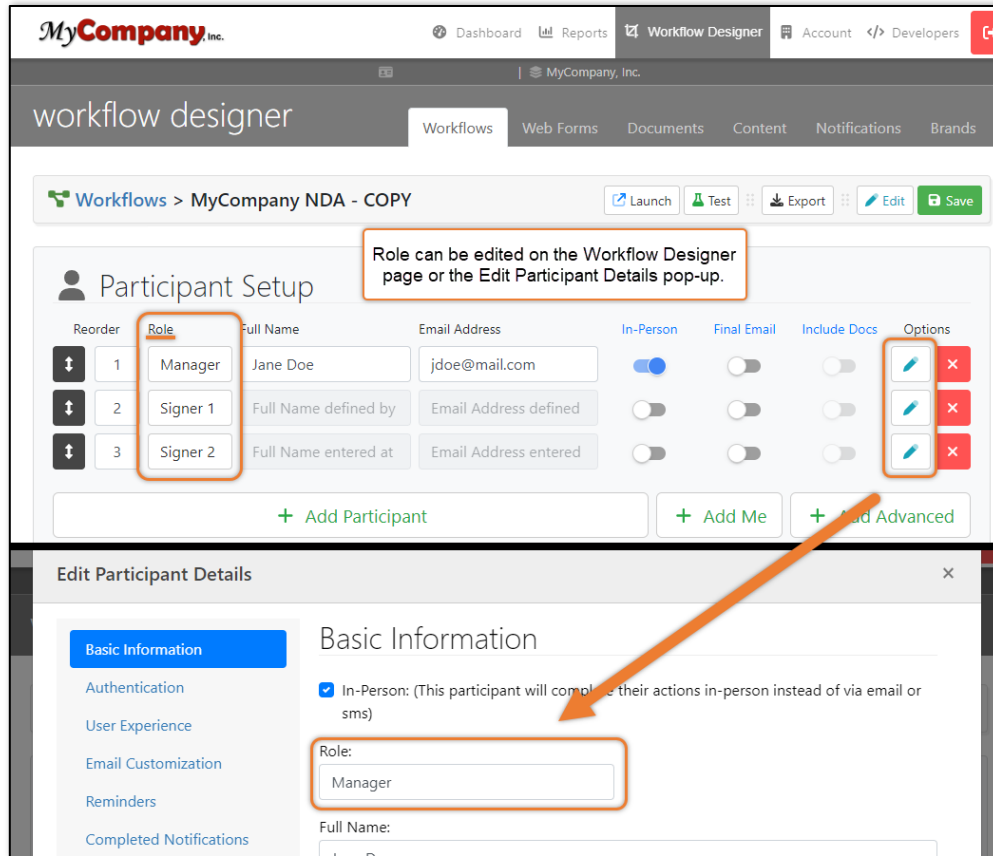


[PEP-7343] - Fixed issue where Signature Block Data would not appear where it was originally placed on the document. This issue occurs if the user was zoomed in over 100% on the page when placing the Signature Block Data in the Task Editor. Please see the image below for more information.



[PEP-7105] - Fixed issue where invalid characters in the role field would cause launch issues. Roles may now only contain Alphanumeric, dashes, underscores, spaces or #. Please see the image below for an example and more information.

Release Notes

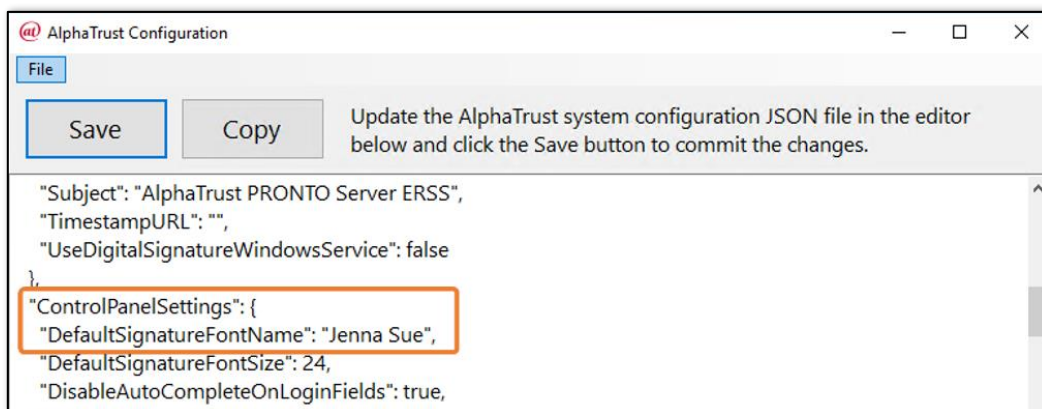


v5.17.11 Release

Release Date: 11/30/2023

Bug Fixes

[PEP-7449] - Fixed issue where Font-Stamped Signatures would default the font to Jenna Sue if no font was provided in the API call, regardless of the actual font setting. Added functionality to use the Default Font set in the config if the font is not provided in the transaction. Please reference the image below for an example of the Default Font set in the config.



[PEP-7112] - Fixed issue where the Audit Report would incorrectly show a document's type as HTML. Please reference the image below for an example and more information.

Release Notes

The screenshot shows the 'reports / status' page with a navigation bar including Dashboard, Reports, Workflow Designer, Account, and Developers. The main content area is titled 'Search Results > Transaction Details: Audit Report'. Below this is a green header for 'audit report html' with a 'Void Transaction' button. A table lists transaction details:

Document ID	Document Title	Task ID	Task Type	Participant ID	Participant Name	Options
1001372061	DUMMY w fields	1001372061	Signature	1001372061	Luke B	

Below the table, the 'DOCUMENT: DUMMY w fields' section shows details: Title: DUMMY w fields, Document ID: 1001372061, Type: HTML (highlighted with a red box and an arrow pointing to a note: 'Type should be PDF instead of HTML'), Status / ID: Completed / 4, Created: 2023-08-11 11:00 AM EDT, and Completed: 2023-08-11 11:00 AM EDT.

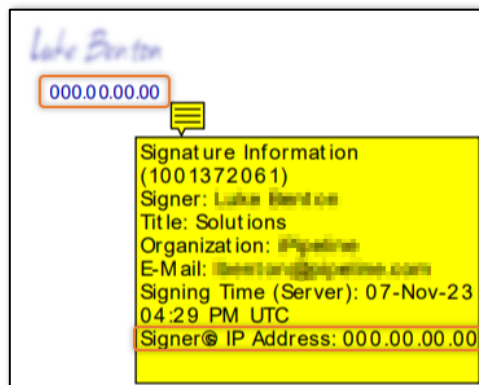
v5.17.10 Release

Release Date: 11/16/2023

Bug Fixes

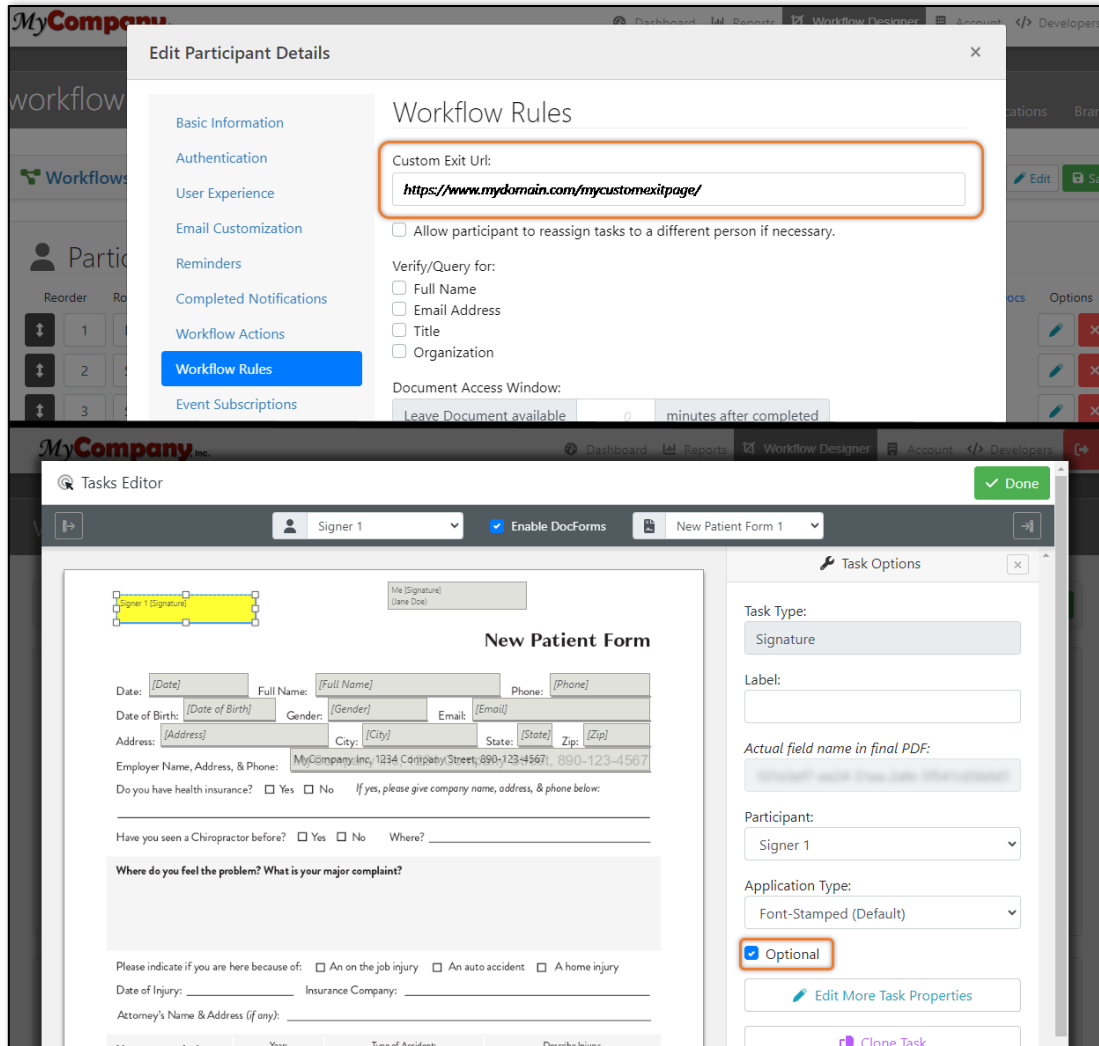
[PEP-7407] - Fixed issue where closing transactions could cause 502 Gateway Errors.

[PEP-7401] - Fixed issue where a signers IP address would not be displayed in the signature annotation and Signature Block Data when it should have been included. Please see the image below for an example of the correct signature block and annotation containing a signers IP address.

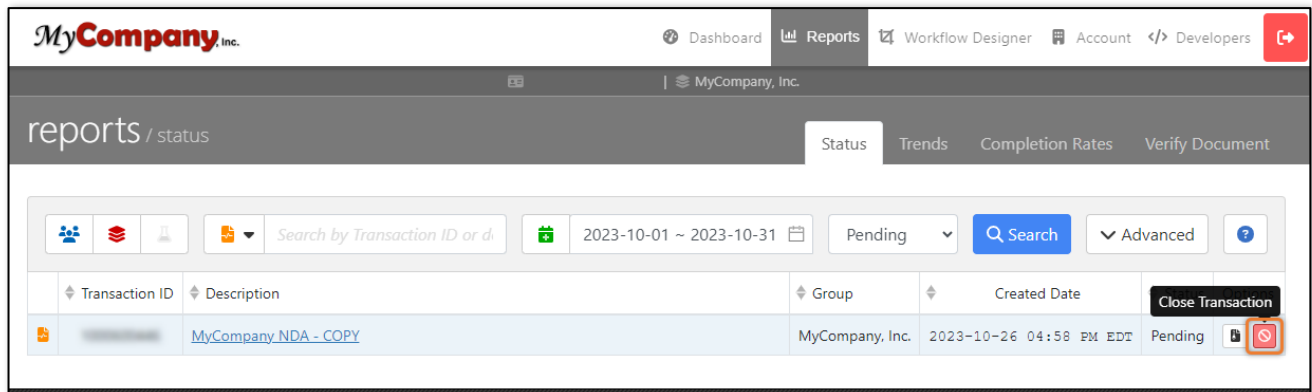


[PEP-7396] - Fixed issue where if a participant declined to complete an optional signing task, the system would incorrectly navigate the participant to the participant's custom exit URL if it was set. Please see the image below for an example and the settings referenced.

Release Notes

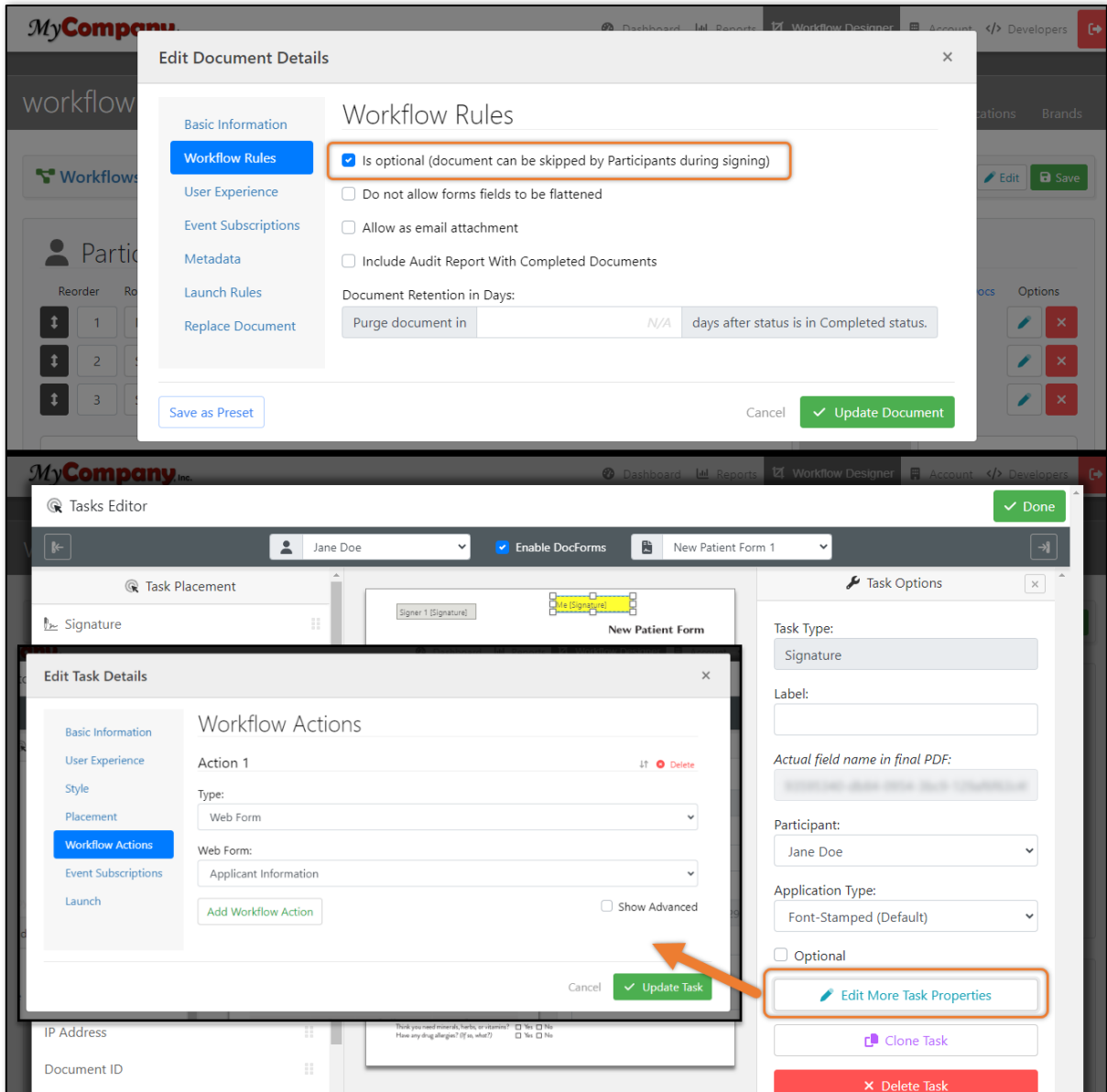


[PEP-7376] - Fixed issue where final emails would not properly be sent when a transaction was manually closed. Please see the image below for an example and the setting referenced.



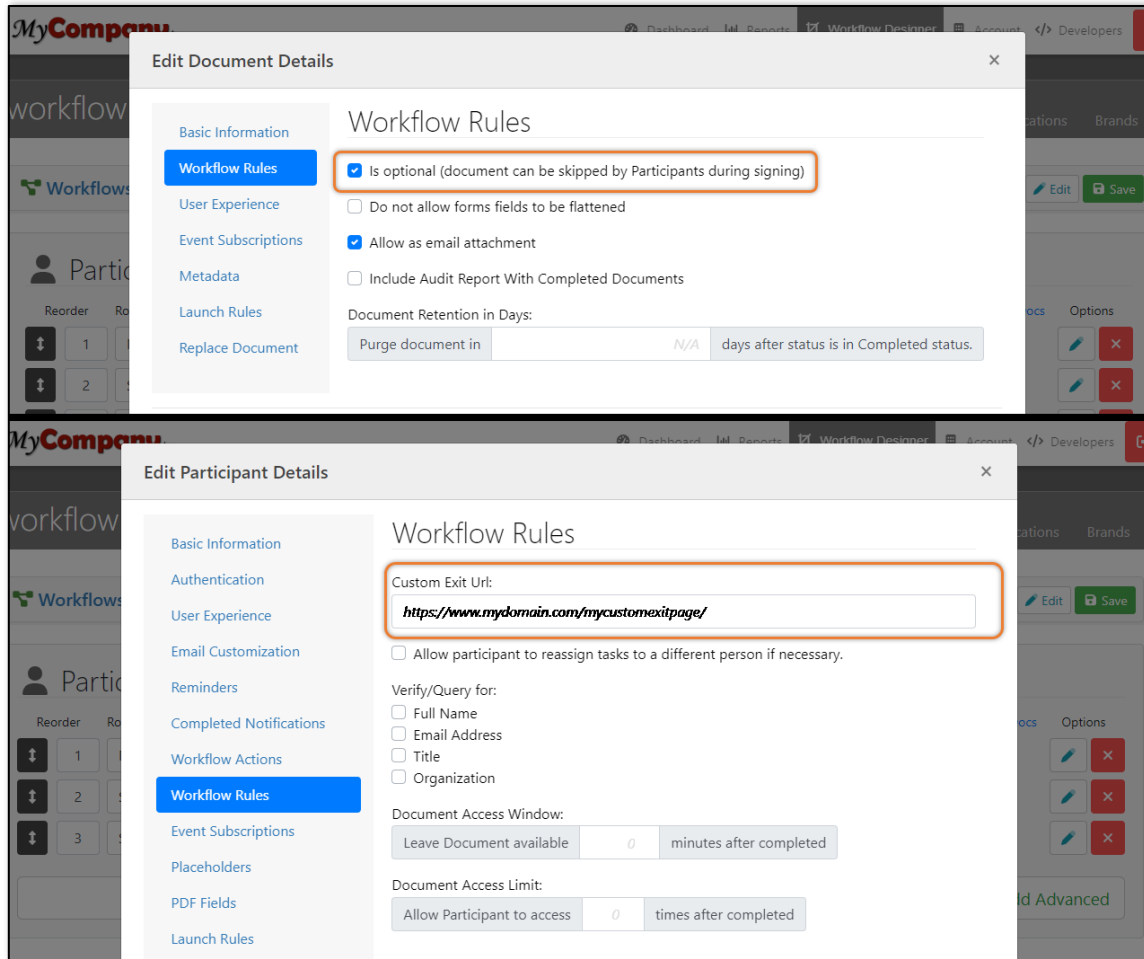
[PEP-7331] - Fixed issue where if a participant cancelled an optional task, they were not routed to any subsequent task Workflow Actions. Please see the image below for an example and the settings referenced.

Release Notes

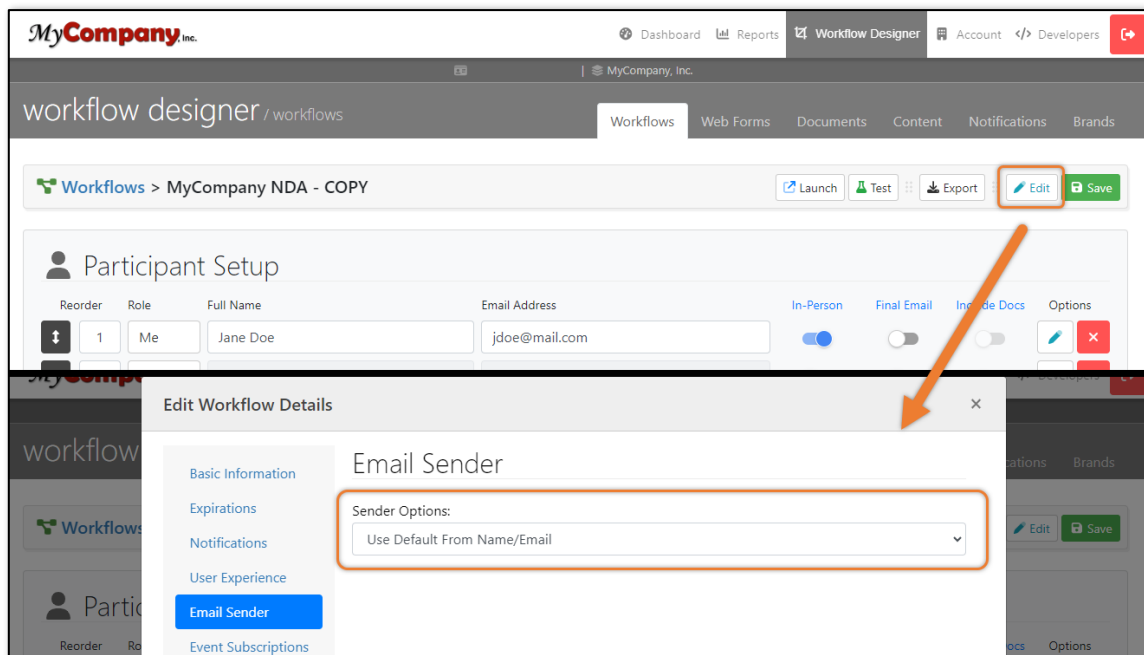


[PEP-7330] - Fixed issue where if a participant had a custom exit URL and they cancelled an optional task, they were incorrectly taken to the custom exit URL instead of the next task. Please see the image below for the settings referenced.

Release Notes

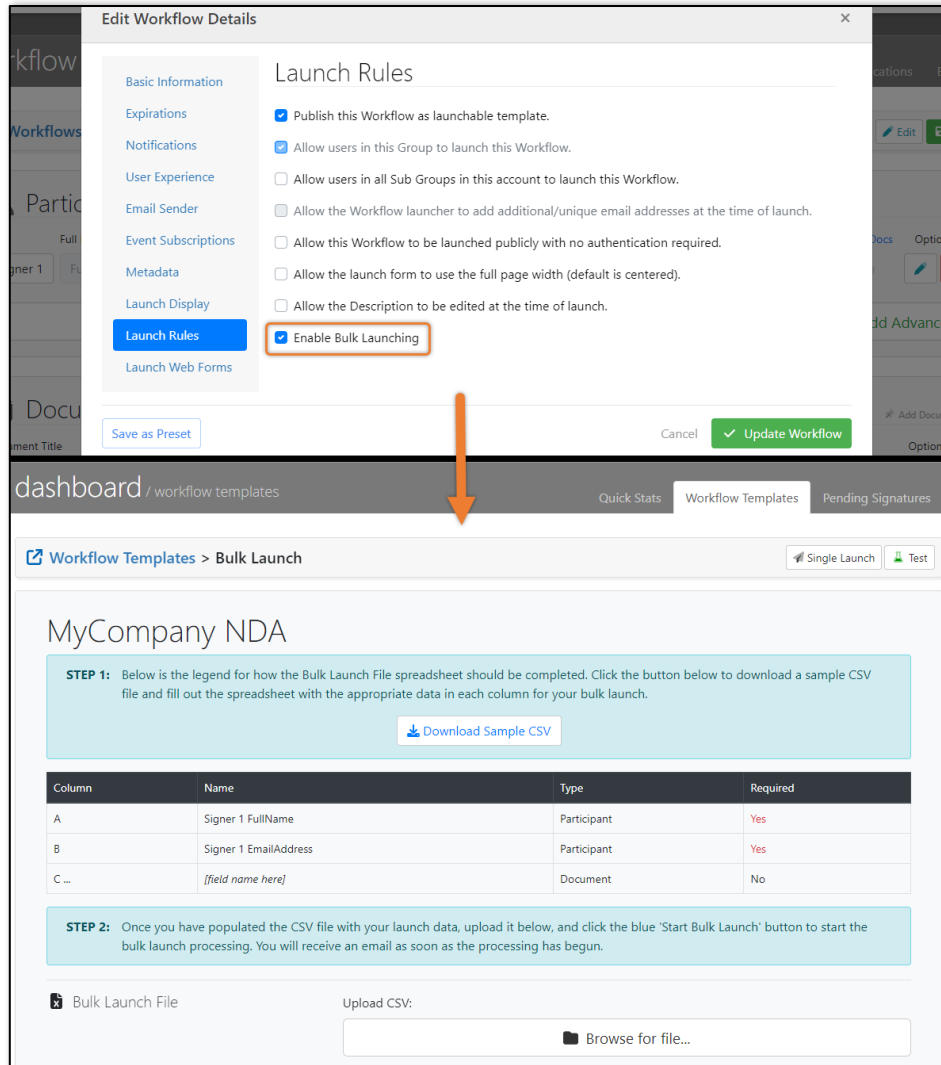


[PEP-7309] - Fixed issue where when attempting to update the Email Sender the setting would revert to the default Sender Option instead of the Sender Option that was selected. Please see the image below for the referenced setting.



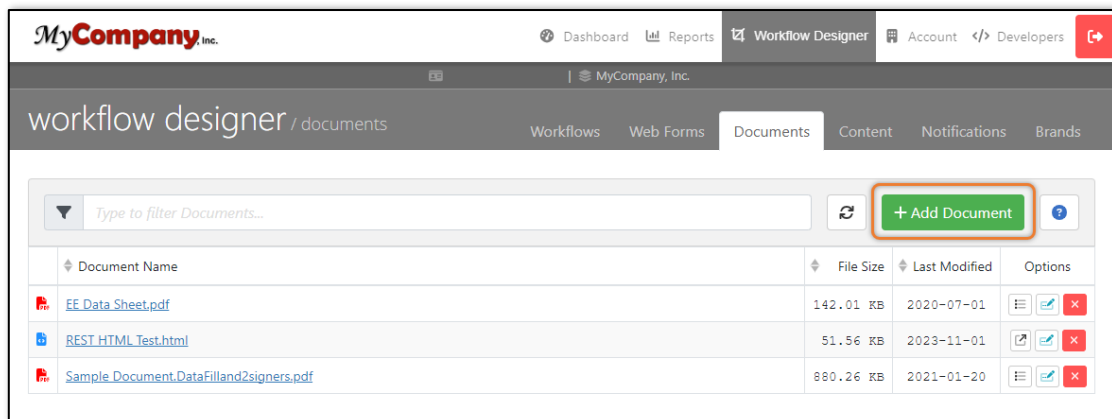
[PEP-7308] - Fixed issue where bulk launch headers would be incorrect when utilizing the Bulk Launch feature. Please see the image below for the settings referenced.

Release Notes



[PEP-6603] - Added database index to prevent performance issues when querying for transaction token data.

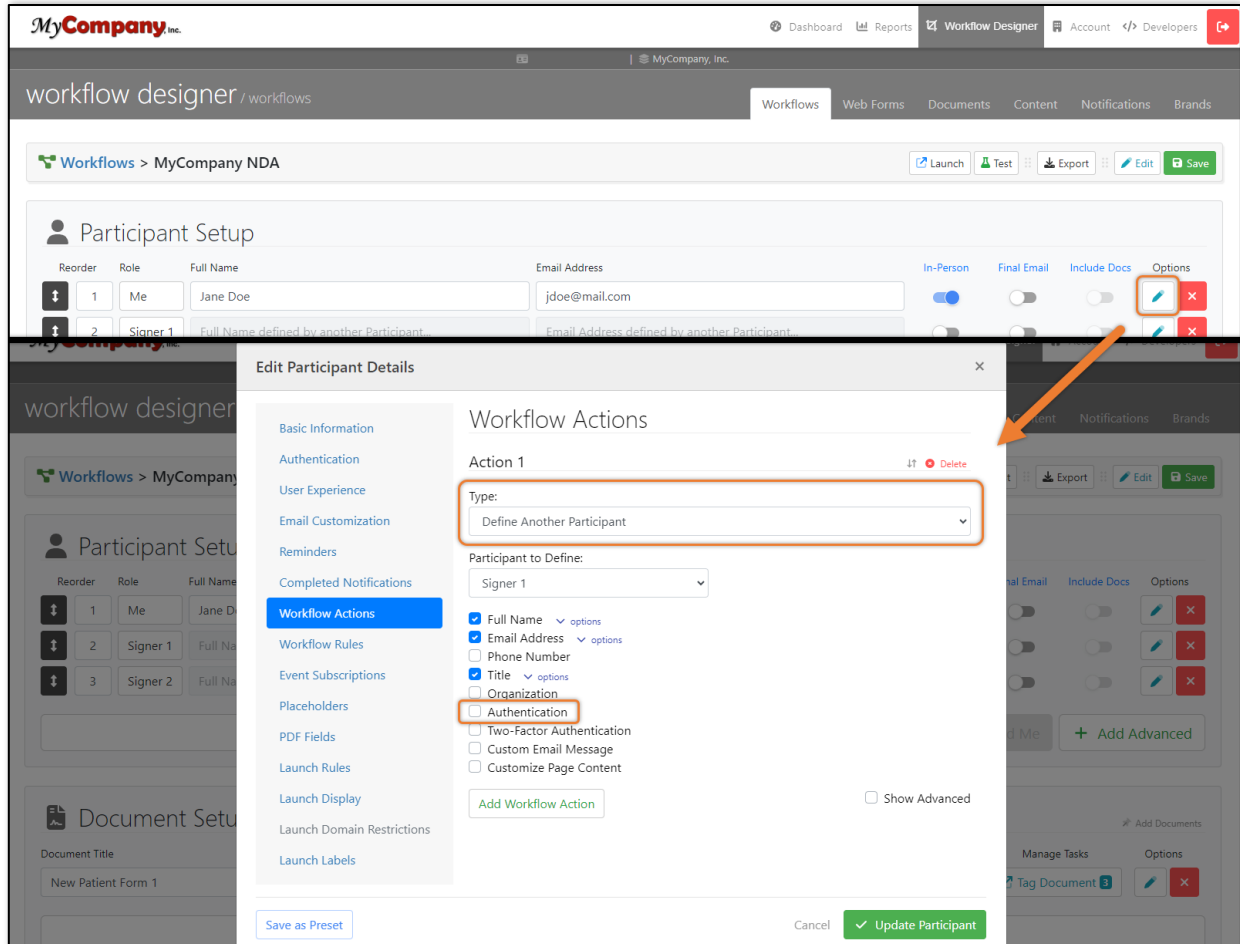
[PEP-3116] - Fixed issue where when a user attempted to upload an unsupported file type in the Documents section, the *Documents uploaded successfully* message displayed when it shouldn't have. When unsupported file types are uploaded, an error message will now appear stating that the file type is not supported. Please see the image below for the settings referenced.



Release Notes

Bug Fixes

[PEP-7440] - Fixed issue where participants were being incorrectly prompted to set a Pin/Password, when defining another participant, when the field was not selected to be requested. The Pin/Password field should only appear during the Define Participant Workflow Action when selected in the Workflow Action settings. Please see the image below for the referenced settings.



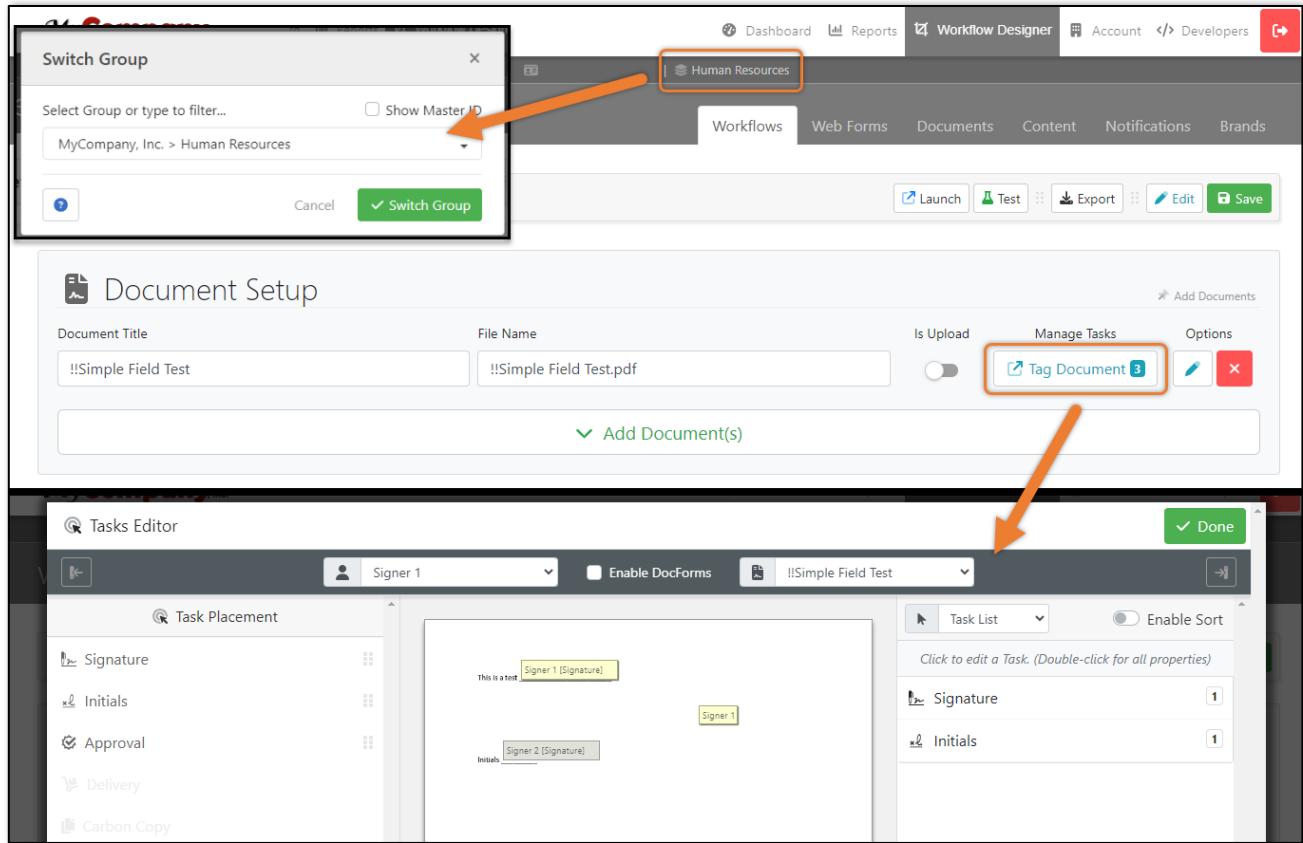
v5.17.9 Release

Release Date: 11/3/2023

Bug Fixes

[PEP-7348] - Fixed issue where users were unable to use and save changes made in the Task Editor if they were working in a Sub-Group. Please see the image below for more details.

Release Notes

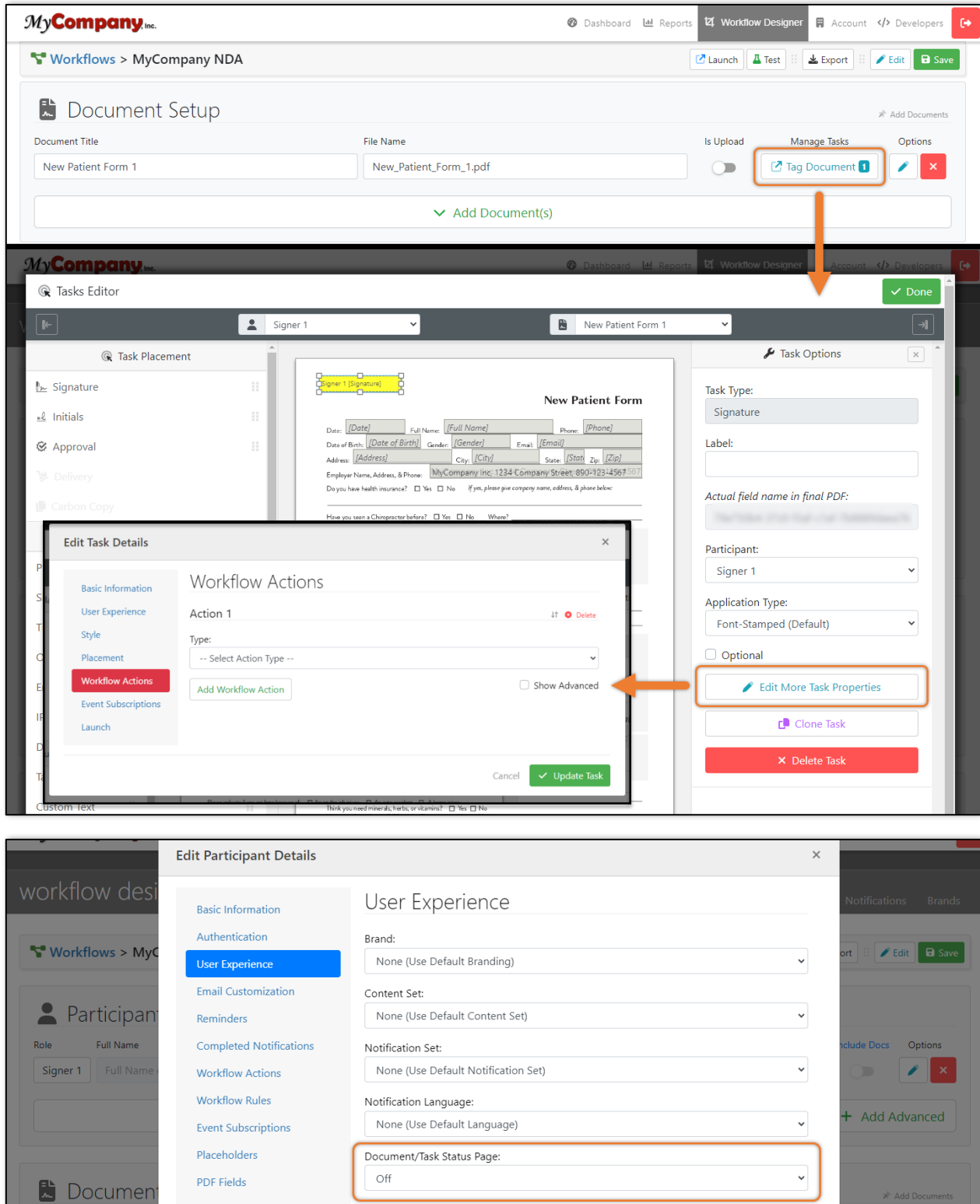


[PEP-7327] - Fixed issue where API calls that were reusing document templates, that also pass in form field data merged into the document, were being incorrectly read from cache.

[PEP-7280] - Fixed issue where when installing on a new multi-server with a shared database, the license request file generation fails for one server.

[PEP-7278] - Fixed issue where Task Workflow Actions would not properly redirect the participant to a custom ULR from the document tasks page under certain conditions. The conditions included that the task on the first document had a Workflow Action, DocForms was not enabled for the participant, and if the Status Page was set to off for the participant. Please see the images below for the settings referenced.

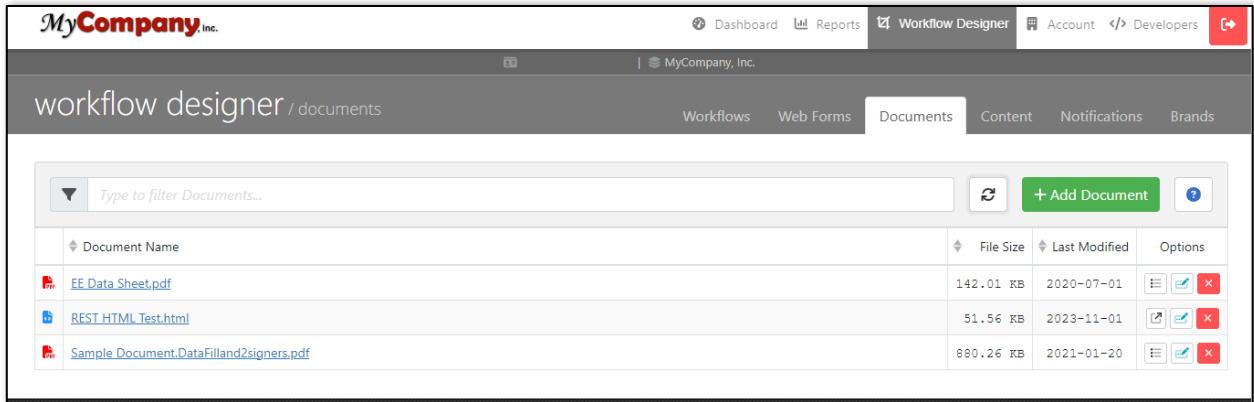
Release Notes



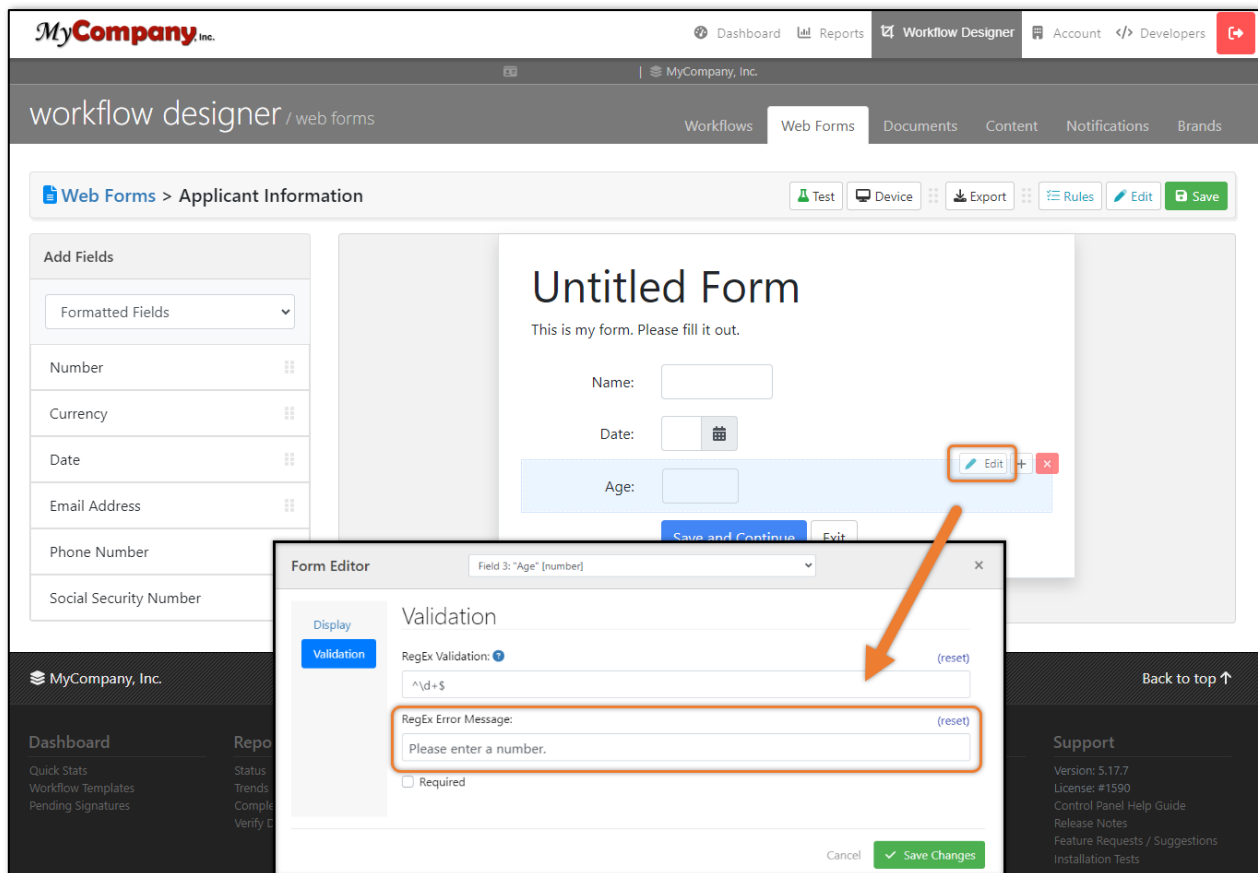
[PEP-7277] - Fixed issue where on the first attempted install, the installer would use an incorrect connection string causing a database connectivity error. Please note that running a 'fresh' install or running the installer again, after ensuring the DUL file contains the correct information, would resolve the issue.

[PEP-7228] - Fixed issue where when uploading HTML documents into the Documents section, an error would display even though the file was uploaded successfully. Please see the image below for the referenced settings.

Release Notes



[PEP-7199] - Fixed issue where users would see an unhelpful error message in a Web Form if the error message was set to null or not set. Please see the image below for an example and the referenced settings.



[PEP-6816] - Fixed issue where participants were able to attempt to authenticate multiple times even after failing authentication. The config setting, AuthPINPasswordBadLoginLimit, was being ignored and allowing a user to continue to attempt to authenticate past the set limit.

v5.17.8.1 Release

Release Date: 10/31/2023

Bug Fixes

[PEP-7375] - Fixed issue where DocForms images would not appear during the signing process. Participants would see the fields on screen, but the document itself would not appear as it should. Please see the example images below of what was seen and what should have been seen in DocForms.

Release Notes

ATTENTION: Please make sure you fill out all of the form fields and then click the "Save & Continue" button. [Save & Continue →](#)

Fields: 1/3 Required: 0/2

1

New Patient Form

Date: Full Name: Phone:

Date of Birth: Gender: Email:

Address: City: State: Zip:

Employer Name, Address, & Phone: MyCompany Inc, 1234 Company Street, 890-123-45

Do you have health insurance? ☐ Yes ☐ No *If yes, please give company name, address, & phone below:*

Have you seen a Chiropractor before? ☐ Yes ☐ No Where?

Fields: 1/10

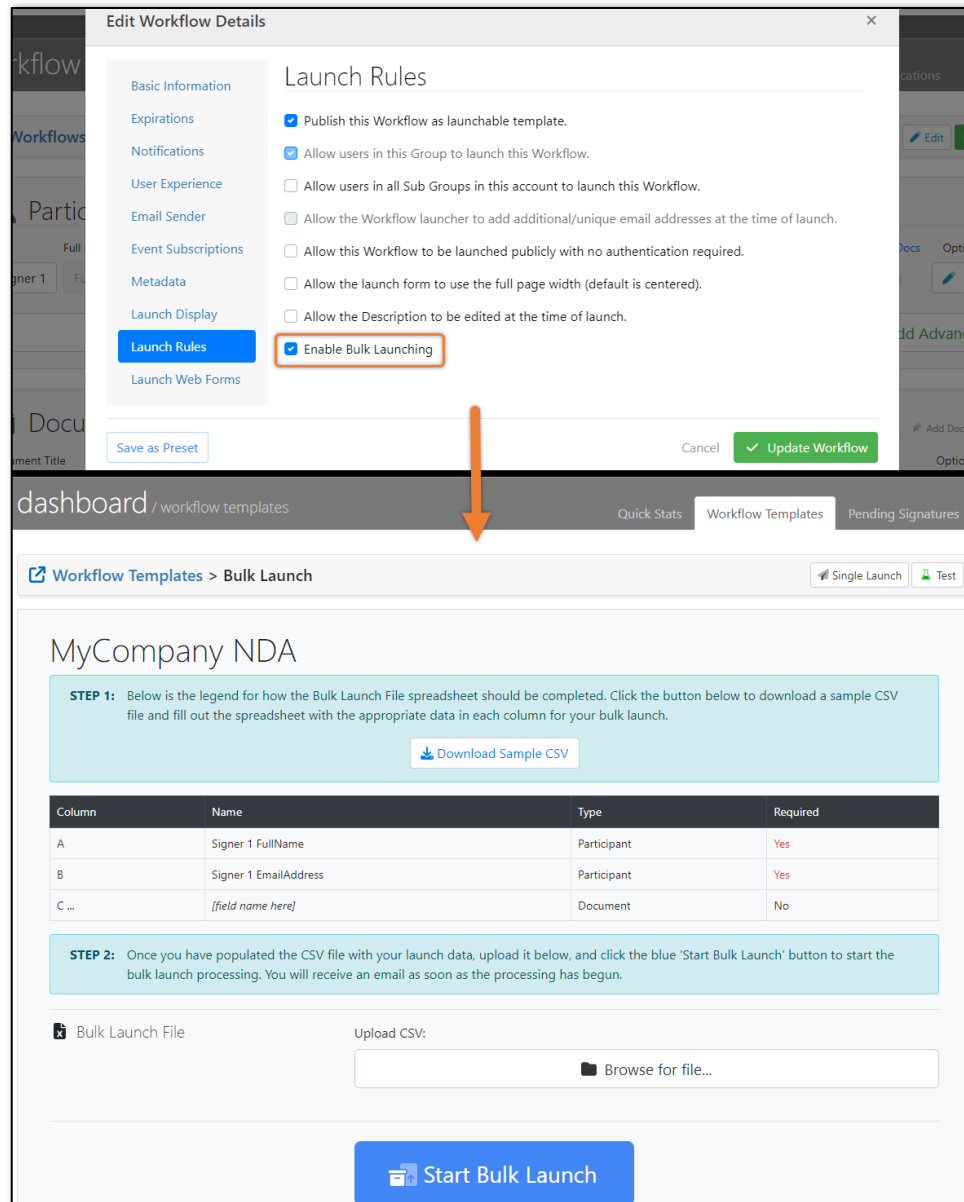
v5.17.8 Release

Release Date: 10/23/2023

Bug Fixes

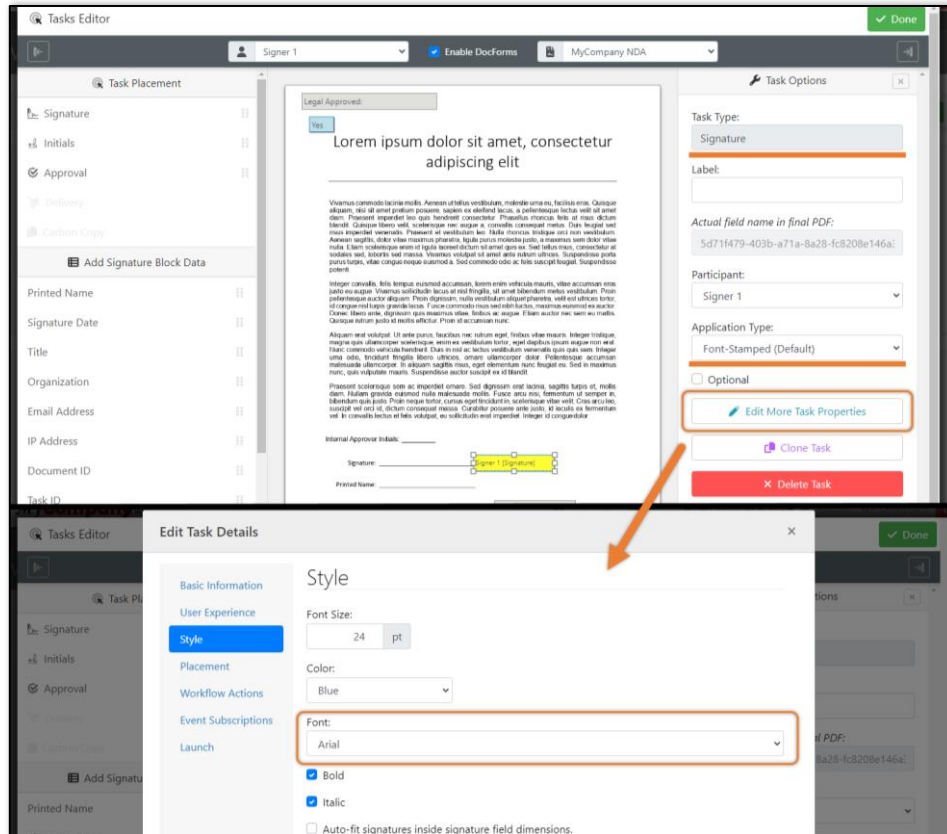
[PEP-7325] - Fixed issue where when utilizing bulk launching, field names containing square brackets, [], were being removed incorrectly. Please see the image below for the settings referenced.

Release Notes

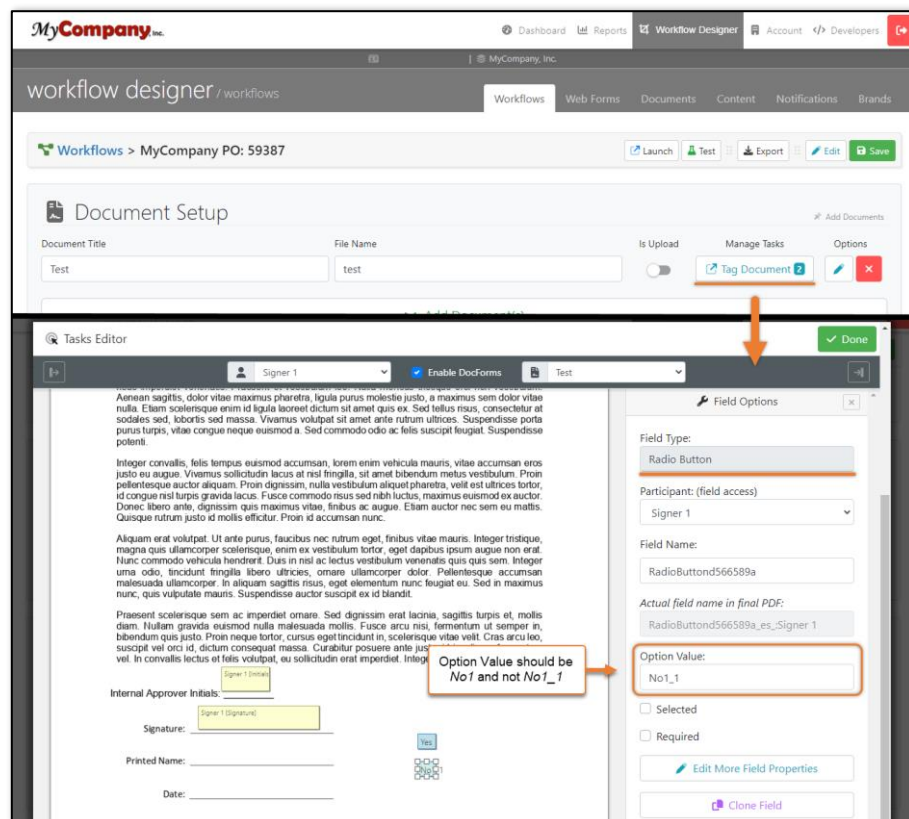


[PEP-7313] - Fixed issue where Font-Stamped Signatures would default the font to Jenna Sue regardless of the actual font setting. Please reference the image below for an example and more information.

Release Notes

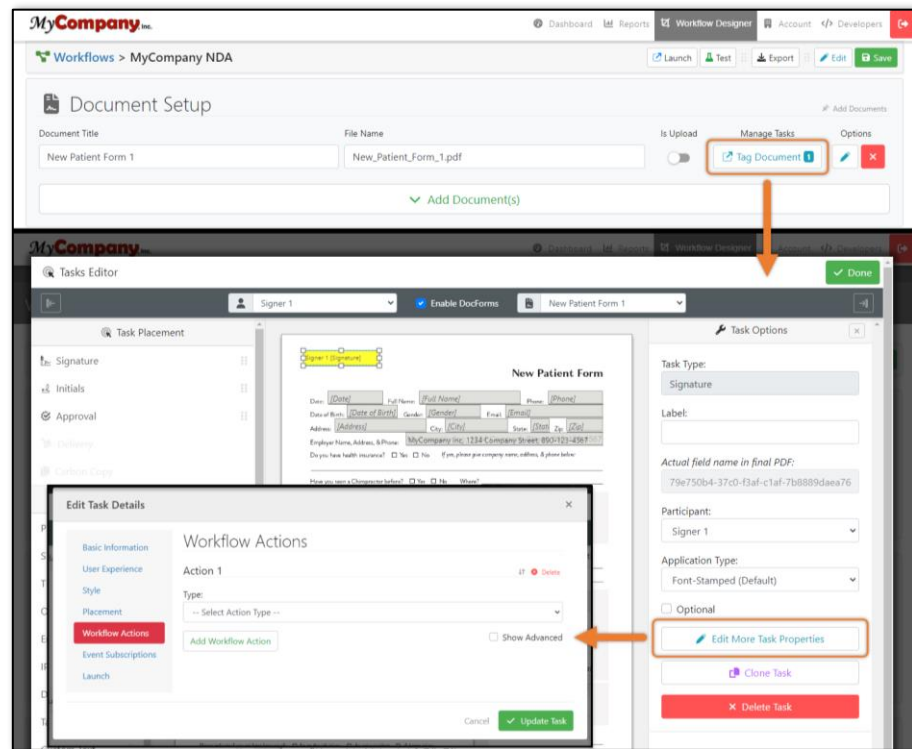


[PEP-7303] - Fixed issue where when updating a radio button's *Option Value*, in the sidebar, additional values would be added in an attempt for the system to ensure unique values. Please note that if the value is updated in the *Form Field* editor modal, which can be access by clicking on the *Edit More Field Properties* button, the issue would not occur. Please see the image below for the settings referenced and an example.

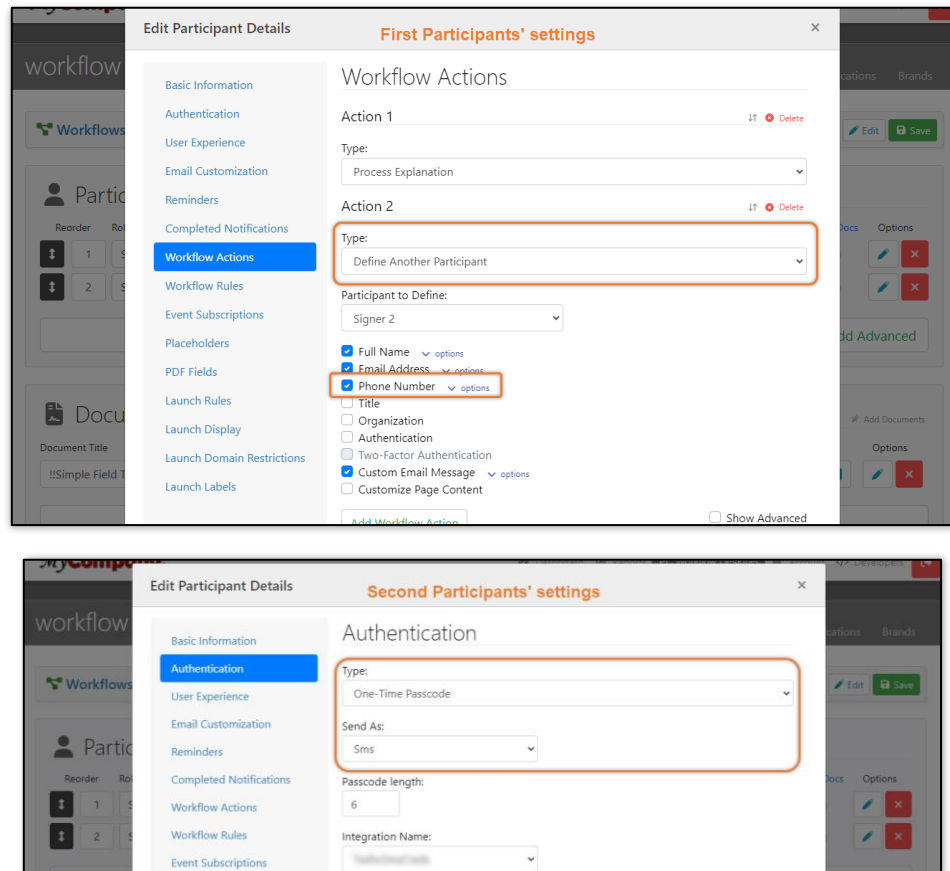


Release Notes

[PEP-7283] - Fixed issue where Task Workflow Actions would be incorrectly skipped under certain conditions. The condition was if more than one document was included in the transaction and the task on the first document had a Workflow Action. Please see the settings referenced in the image below.

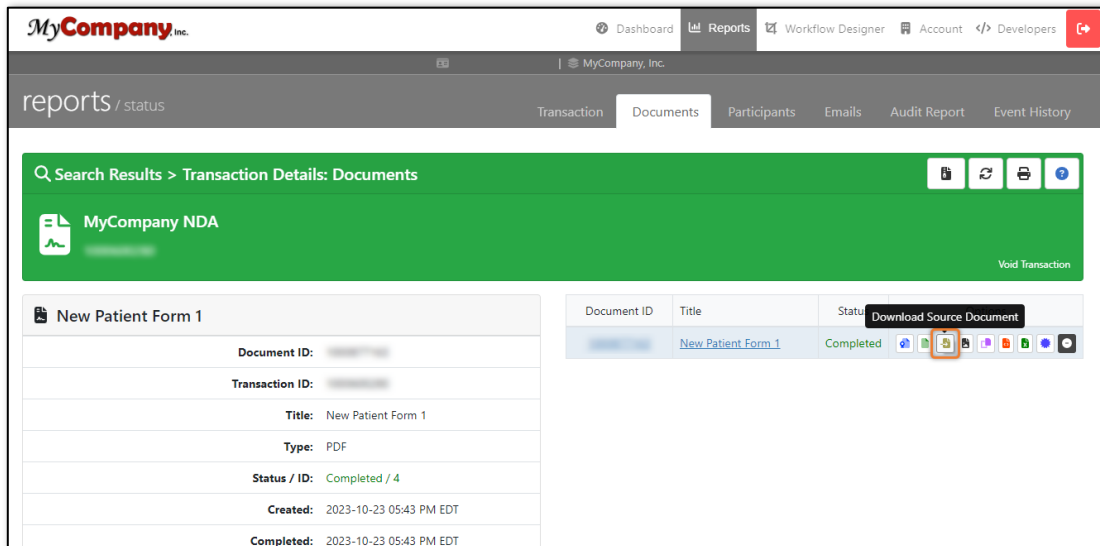


[PEP-7279] - Fixed issue where when defining a participant's phone number for mobile authentication, the phone number entered would not be properly saved. Please see the settings referenced in the images below.

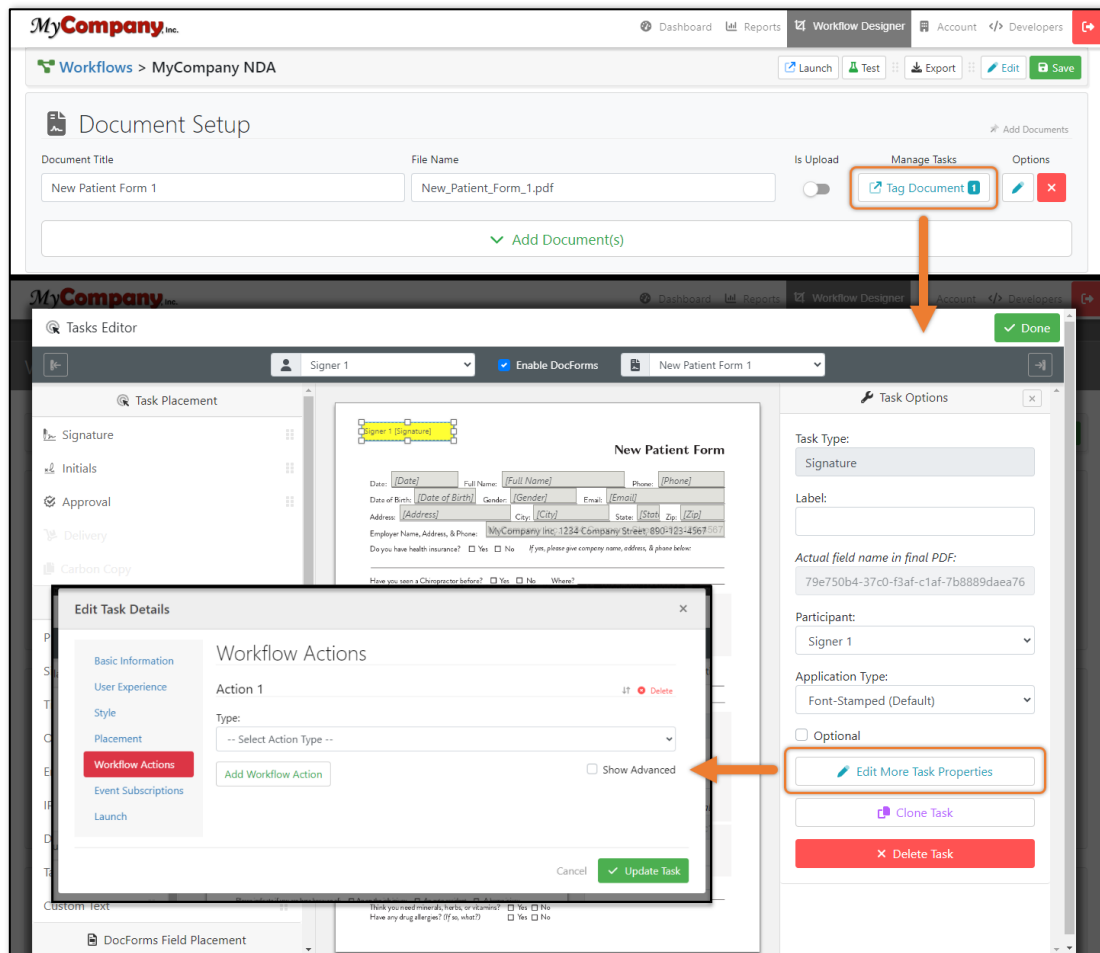


Release Notes

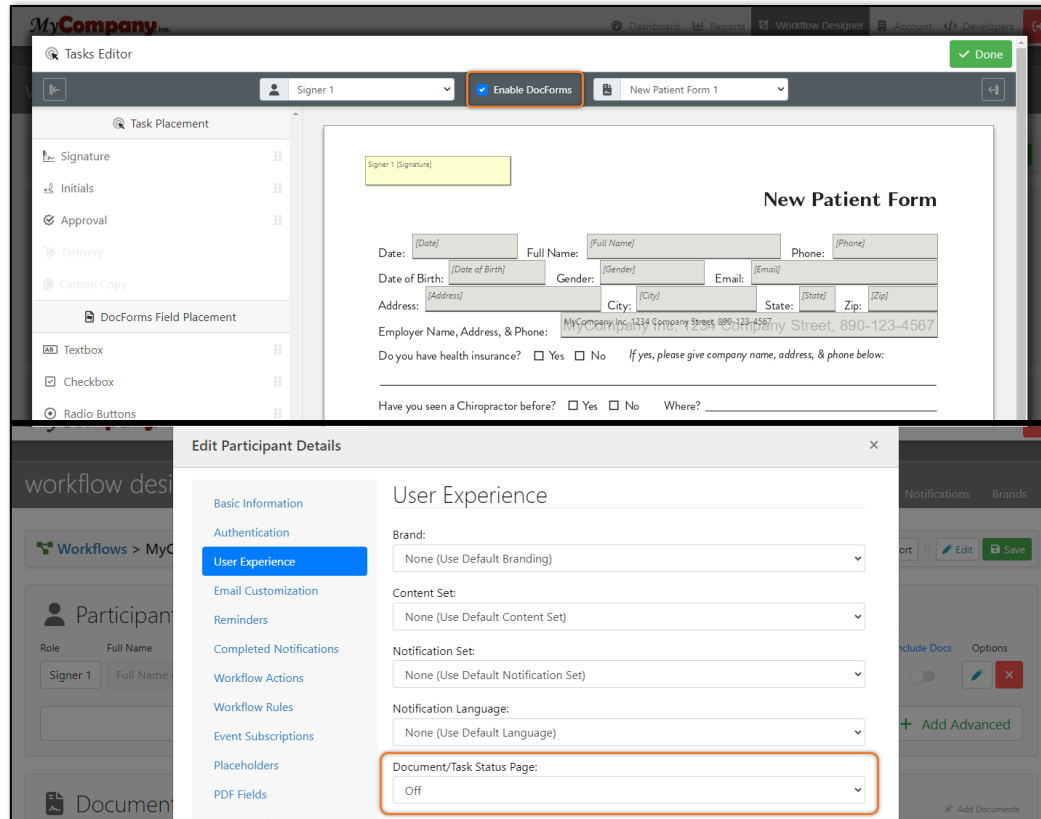
[PEP-7261] - Fixed issue where when attempting to download the Source Document a user would receive an error message and the source document would not download. The Source document should be available to be downloaded. Please see the image below for the settings referenced.



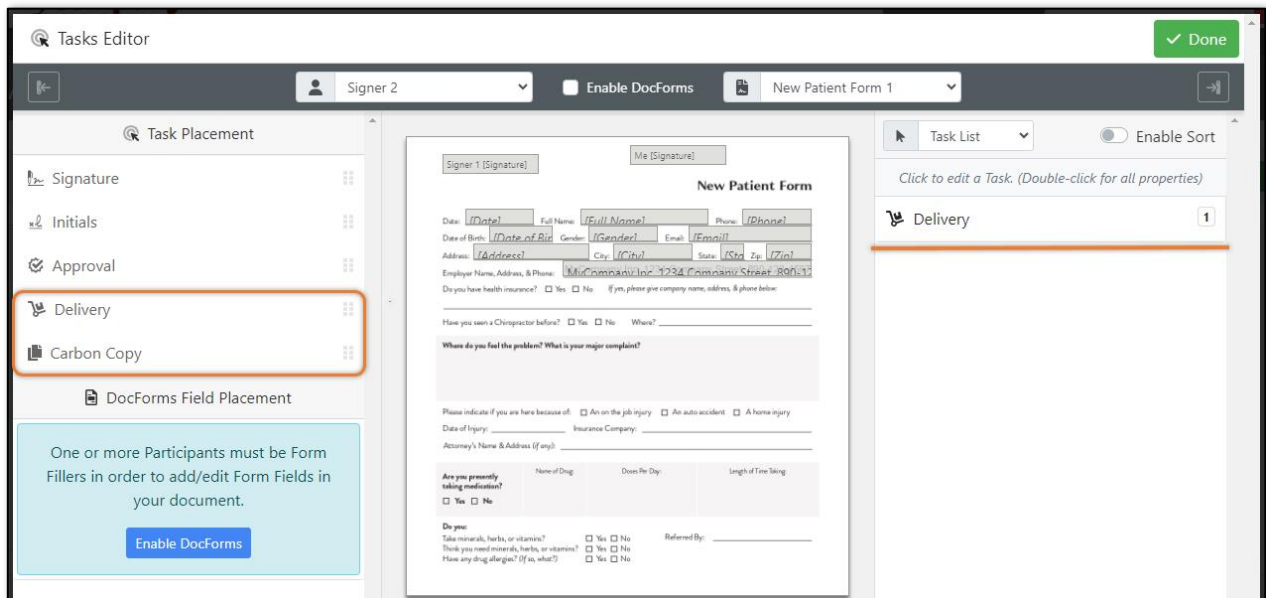
[PEP-7253] - Fixed issue where Task Workflow Actions would be incorrectly skipped under certain conditions. The conditions included DocForms being enabled for a document or participant, and if the Status Page was set to off for the Participant. Please see the images below for the settings referenced.



Release Notes

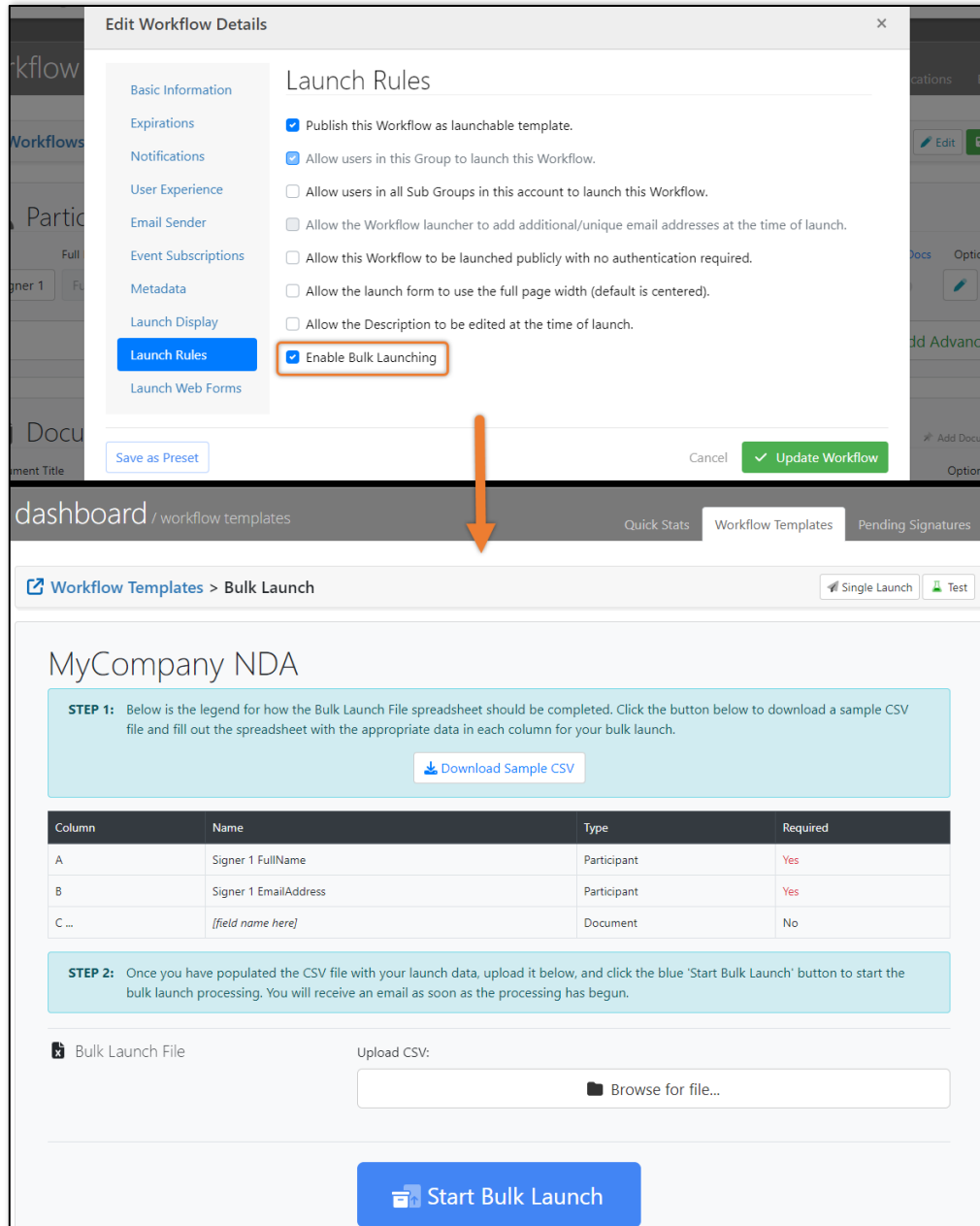


[PEP-7250] - Fixed issue where Delivery and Carbon Copy tasks were showing with locations on document pages while tagging a document. They now are only accessible from the right Tasks side bar and will not show on the document. Please see the image below for the settings referenced and an example.



[PEP-7144] - Fixed issue where when attempting to utilize Bulk Launch for a second time with a Workflow, errors would appear that did not appear when using Bulk Launch the first time. Please see the image below for the settings referenced.

Release Notes



[PEP-6750] - Fixed issue where DocForms were intermittently being skipped on a particular workflow.

[PEP-5183] - Fixed issue where a webhook status of "Unknown" was misleading users. Changed Event Subscription status of 3 from "Unknown" to "Active" to convey that the system is currently attempting to update the third-party endpoint.

v5.17.7.2 Release

Release Date: 10/26/2023

Bug Fixes

Note: The update in version 5.17.7.2 is not included in version 5.17.8 but is included in version 5.17.8.1.

[PEP-7375] - Fixed issue where DocForms images would not appear during the signing process. Participants would see the fields on screen, but the document itself would not appear as it should. Please see the example images below of what was seen and what should have been seen in DocForms.

Release Notes

ATTENTION: Please make sure you fill out all of the form fields and then click the "Save & Continue" button. Save & Continue →

Fields: 1/3 Required: 0/2

ATTENTION: Please make sure you fill out all of the form fields and then click the "Save & Continue" button. Save & Continue →

1

New Patient Form

Date: Full Name: Phone:

Date of Birth: Gender: Email:

Address: City: State: Zip:

Employer Name, Address, & Phone: MyCompany Inc, 1234 Company Street, 890-123-45

Do you have health insurance? ☐ Yes ☐ No If yes, please give company name, address, & phone below:

Have you seen a Chiropractor before? ☐ Yes ☐ No Where?

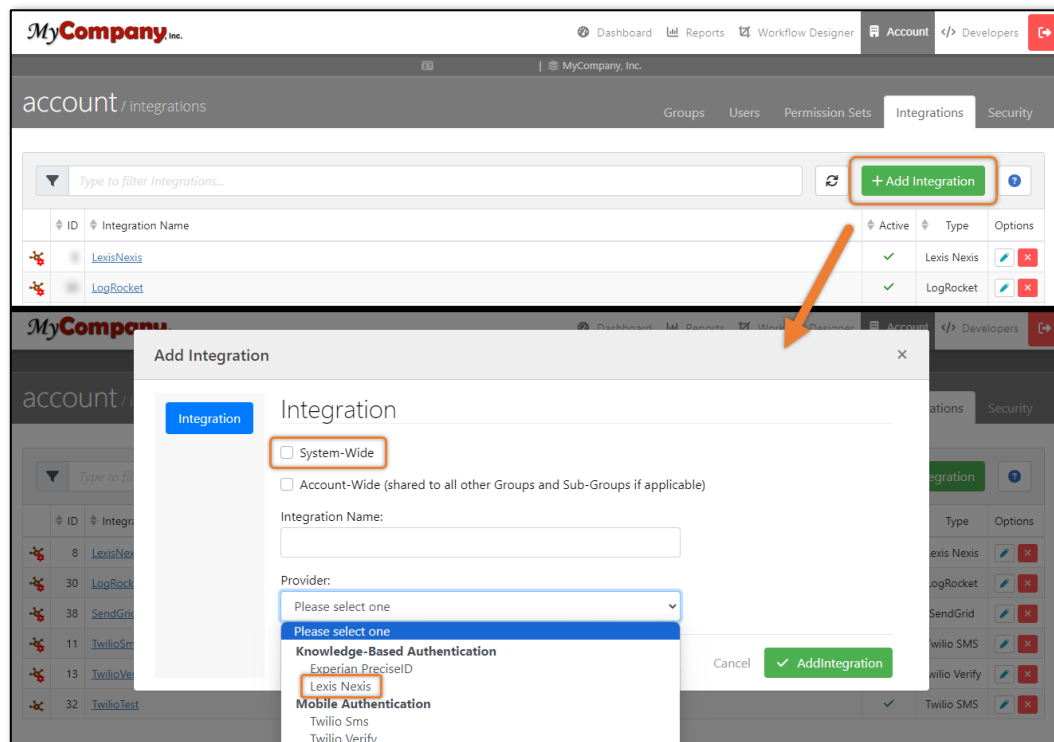
Fields: 1/10

v5.17.7.1 Release

Release Date: 10/18/2023

Bug Fixes

[PEP-7346] - Fixed issue where Lexis Nexis KBA integrations would not work for sub-groups if the integration was not set to System-Wide. Please see the image below for the settings referenced.



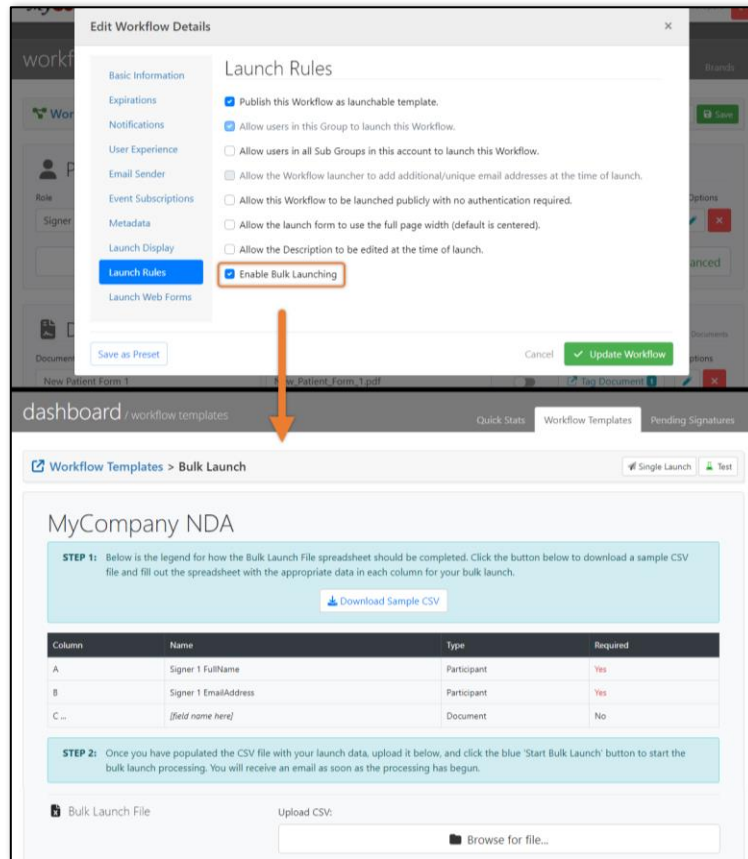
Release Notes

v5.17.7 Release

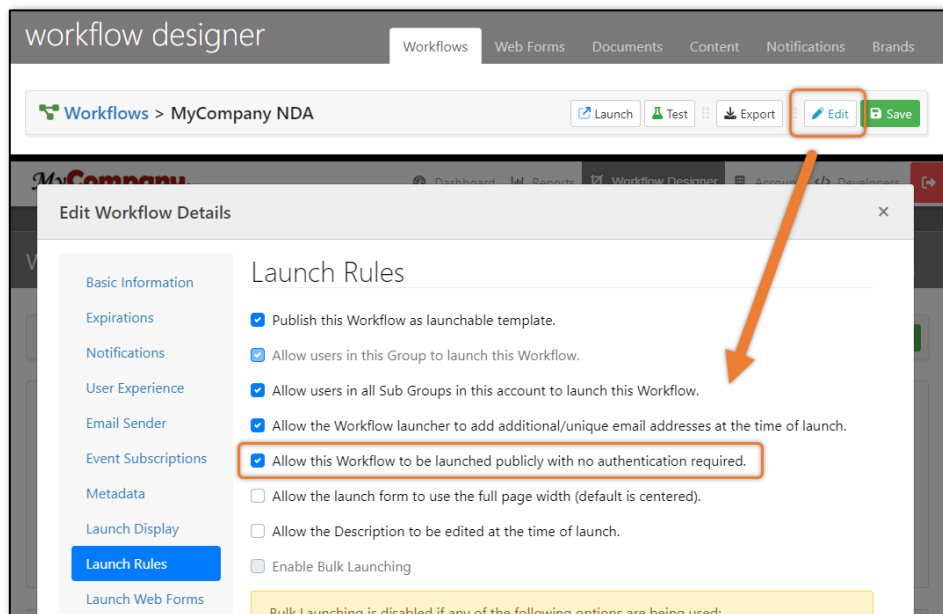
Release Date: 10/5/2023

Bug Fixes

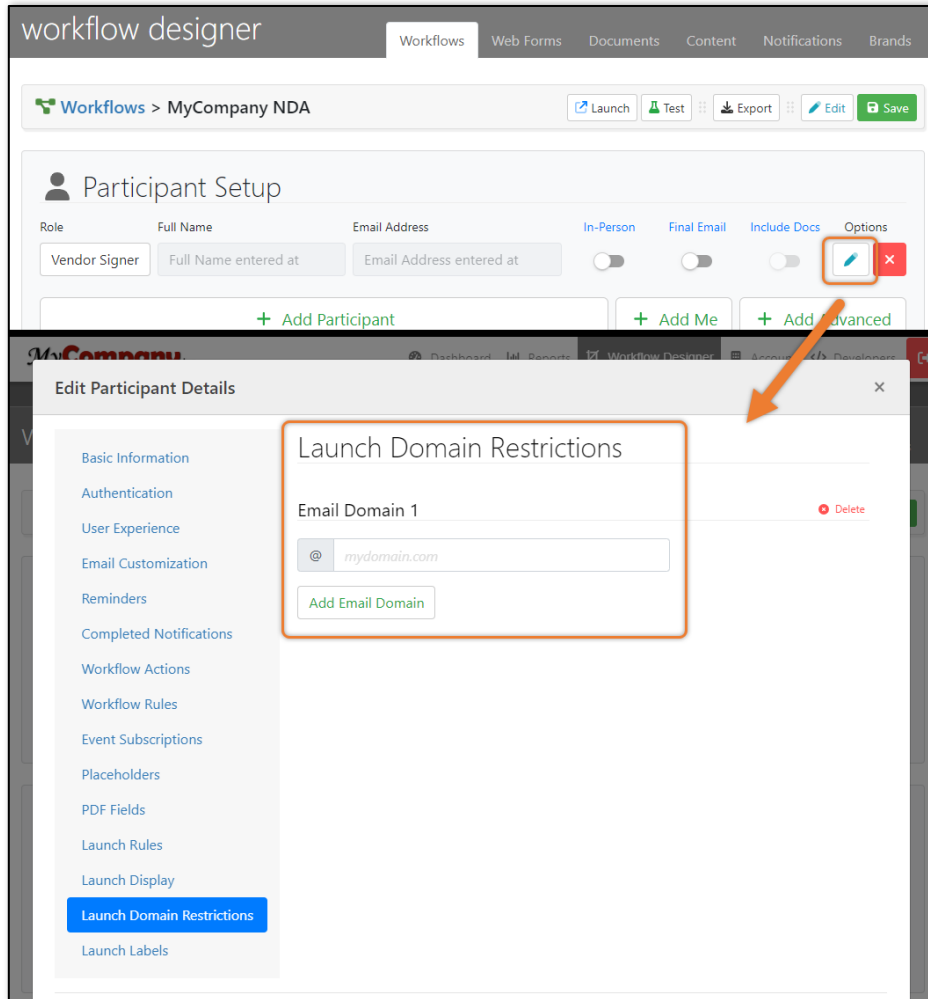
[PEP-7238] - Fixed issue where errors were occurring on repeated Bulk-Launches of the same Workflow. Please see the image below for the settings referenced.



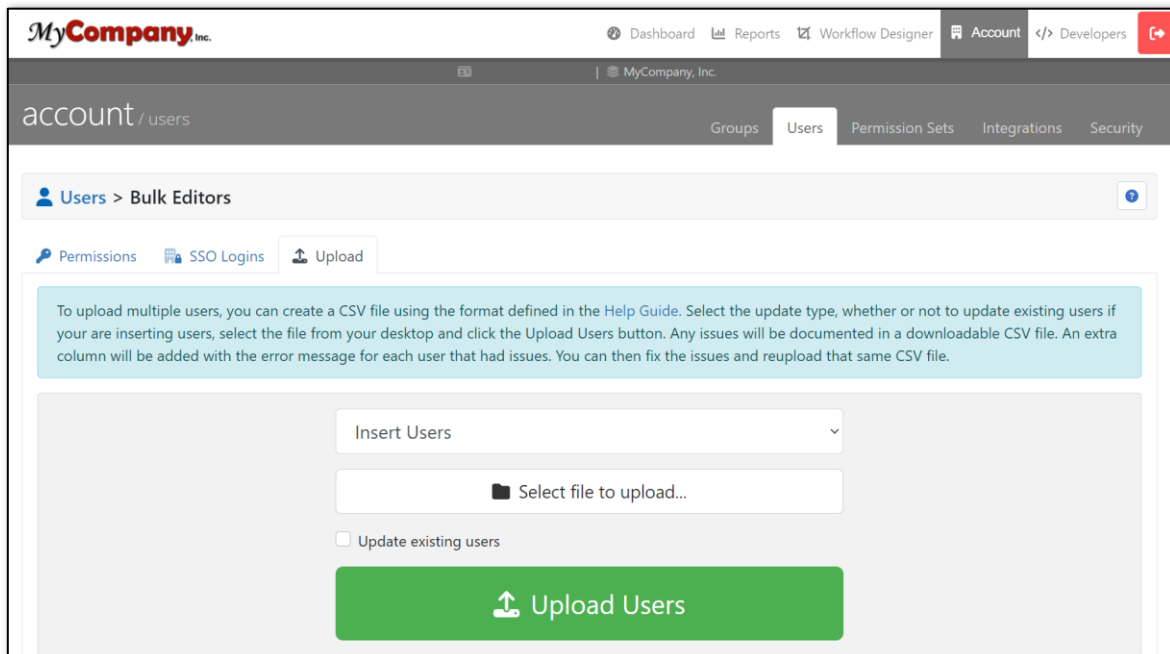
[PEP-7202] - Fixed issue where Launch Domain Restrictions were preventing Workflows, with Public Launch, from launching. Please see the images below for the settings referenced.



Release Notes

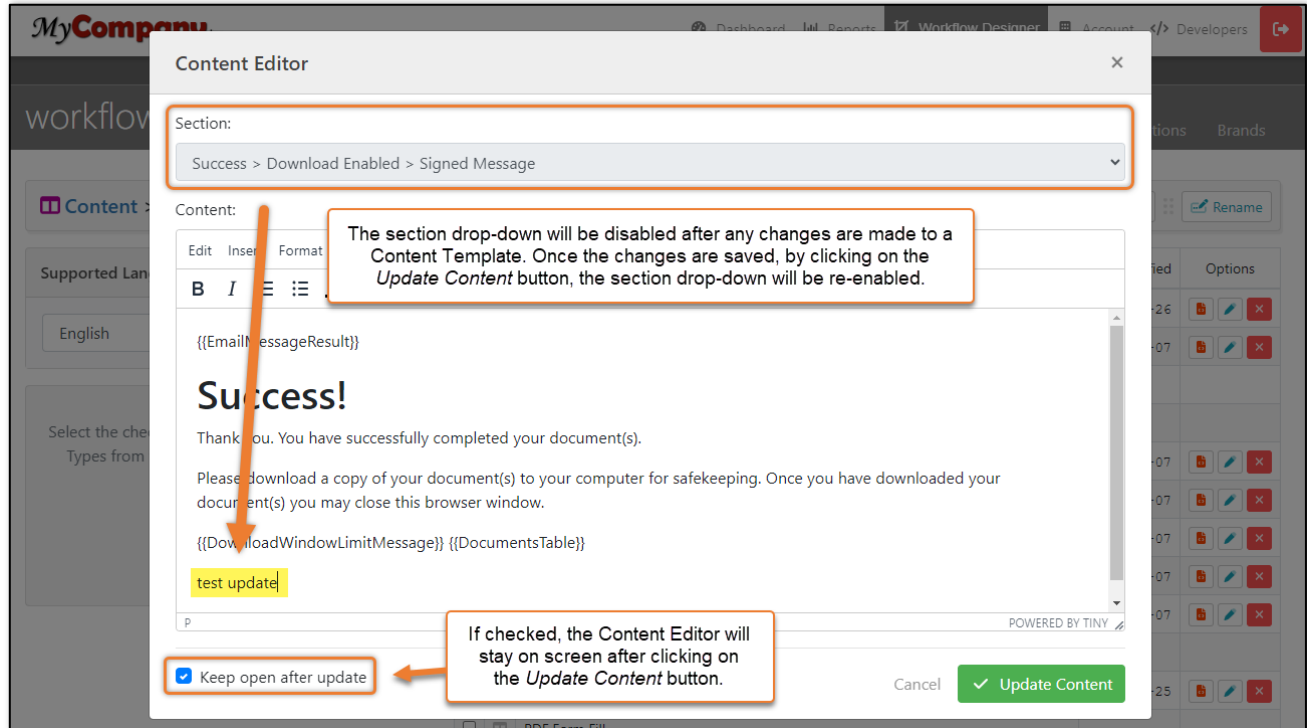


[PEP-7111] - Fixed issue where when attempting to bulk upload users, utilizing the Firefox browser, computers with Microsoft Office installed would see an error reporting a bad file type. Please see the image below for the bulk user upload feature referenced.

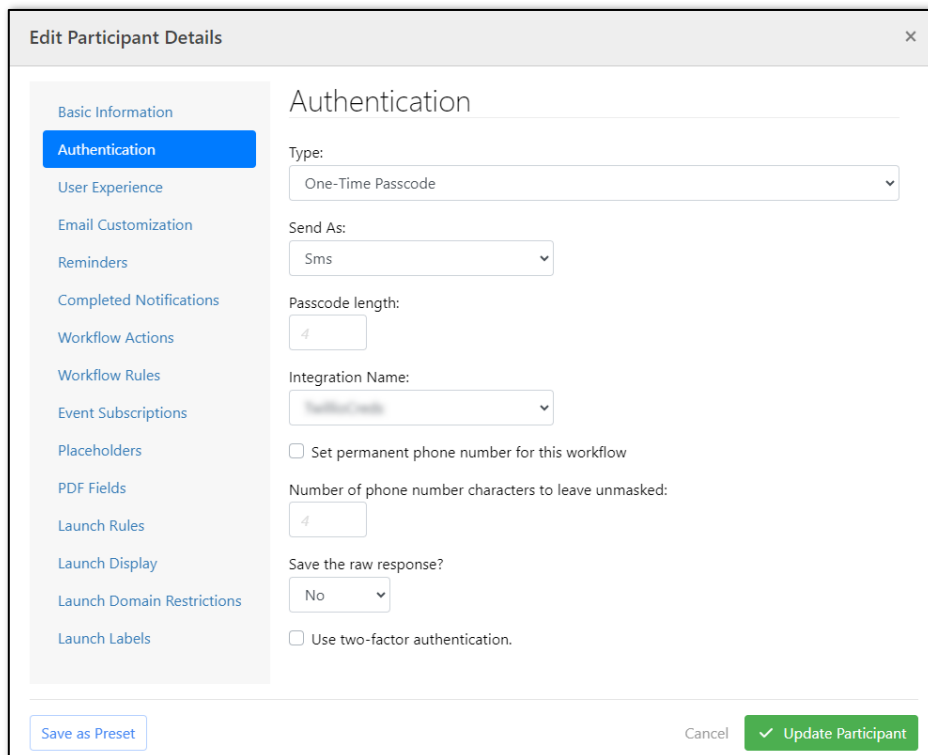


Release Notes

[PEP-6642] - Fixed issue where a user could edit a Content Set and freely switch between sections before saving any changes that were made. If a user switched sections while making changes, the editor would only save the last section that was edited. The Content Template editor will now prevent switching sections if changes are made, and an option was added to keep the editor open so a user can make multiple changes before leaving the editor view. Please see the image below for additional details.



[PEP-5873] - Fixed issue where Workflows would launch successfully even when invalid phone numbers were entered for mobile (One-Time Passcode) authentication. Added regular expression validation for phone number form fields in the Control Panel and Signing UI. The validation will allow the following: numbers, (), +, -, ., and spaces. Please see the images below for the referenced setting and an example.



Release Notes

The screenshot shows the 'MyCompany Inc.' dashboard. The top navigation bar includes links for Dashboard, Reports, Workflow Designer, Account, and Developers. The main content area is titled 'dashboard' and has tabs for Quick Stats, Workflow Templates, and Pending Signatures. Under 'Workflow Templates', there is a 'Test Launch' button. The 'Sample Workflow' form is displayed, featuring a 'Signer 1' section with input fields for 'Full Name' (Jane Doe), 'Email Address' (jdoe@mail.com), and 'Phone Number' (+1 (234) 567-8910). A callout box points to the phone number field, stating: 'Phone Number validation includes: numbers, (), +, -, ., and spaces'. A blue 'Send Workflow' button is located at the bottom of the form.

v5.17.6.2 Release

Release Date: 2/12/2024

Bug Fixes

Note: The update in version 5.17.6.2 is not included in versions 5.17.7, 5.17.7.1, 5.17.7.2, 5.17.8, 5.17.8.1, 5.17.9, 5.17.9.1, 5.17.10, 5.17.11, or 5.17.12.

[PEP-7710] - Fixed issue where IIS Worker Processes were getting hung during signing. This was seen as a spinner on the Sign UI for users.

v5.17.6.1 Release

Release Date: 10/26/2023

Bug Fixes

Note: The update in version 5.17.6.1 is not included in versions 5.17.7, 5.17.7.1, or 5.17.8, but is included in version 5.17.8.1.

[PEP-7375] - Fixed issue where DocForms images would not appear during the signing process. Participants would see the fields on screen, but the document itself would not appear as it should. Please see the example images below of what was seen and what should have been seen in DocForms.

Release Notes

The image shows two screenshots of a 'New Patient Form'. The top screenshot shows a progress bar at the top with 'Fields: 1/3' and 'Required: 0/2'. The bottom screenshot shows the form fields: Date, Full Name, Phone, Date of Birth, Gender, Email, Address, City, State, Zip, Employer Name, Address, & Phone (pre-filled with 'MyCompany Inc, 1234 Company Street, 890-123-45'), and two checkboxes for health insurance and seeing a chiropractor. A 'Save & Continue' button is visible in the top right of both screenshots.

v5.17.6 Release

Release Date: 9/21/2023

Bug Fixes

[PEP-7230] - Fixed issue where if an SSO option was deleted from a user's profile, other SSO options would not load on a user's detail page. Please see the example image below for the SSO settings referenced.

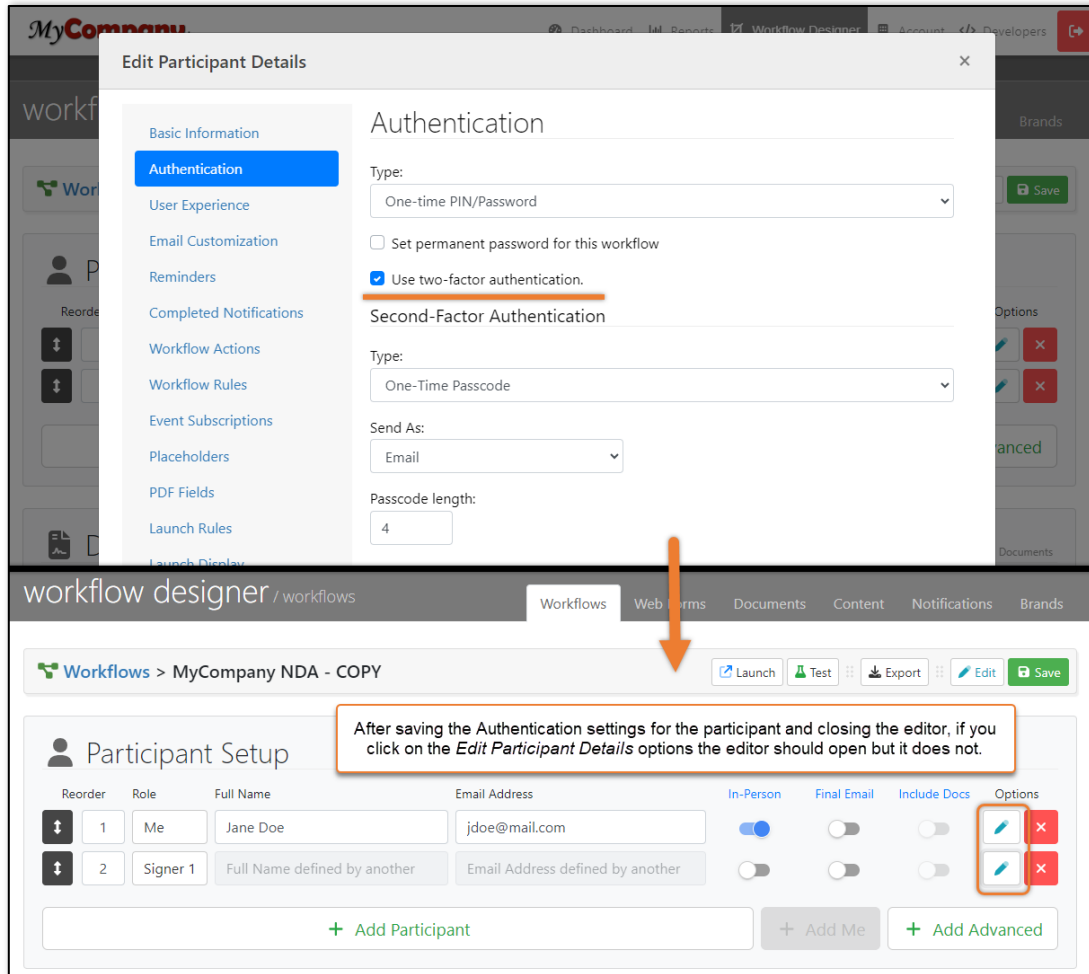
The image shows a screenshot of the 'account / users' page. The user details for 'Bob Jones' are shown on the left, including Username, Full Name, Email Address, Title, Organization, Group ID, and Group. On the right, there is a table of SSO Logins. The table has columns for Integration Name, Username, and Options. Two entries are listed: 'UAT Okta' and 'UAT Okta'. The 'Options' column contains edit and delete icons for each entry.

Integration Name	Username	Options
UAT Okta	[redacted]	[edit] [delete]
UAT Okta	[redacted]	[edit] [delete]

[PEP-7229] - Fixed issue where an HTTP status code of 500 was occasionally returned when creating transactions under load.

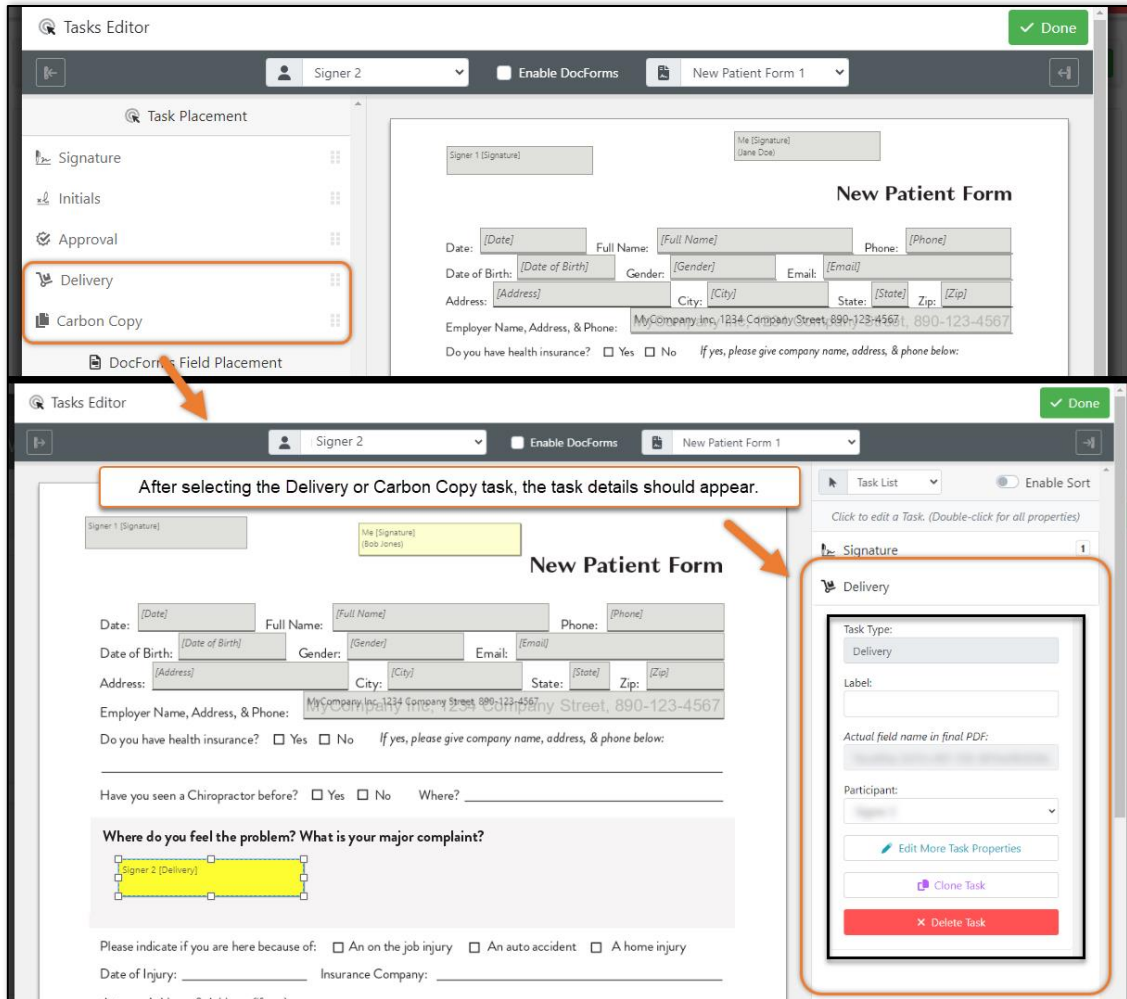
[PEP-7213] - Fixed issue where under certain authentication pairings the Edit Participant Details editor would not open after being set. Please see the image below for an example and the settings referenced.

Release Notes

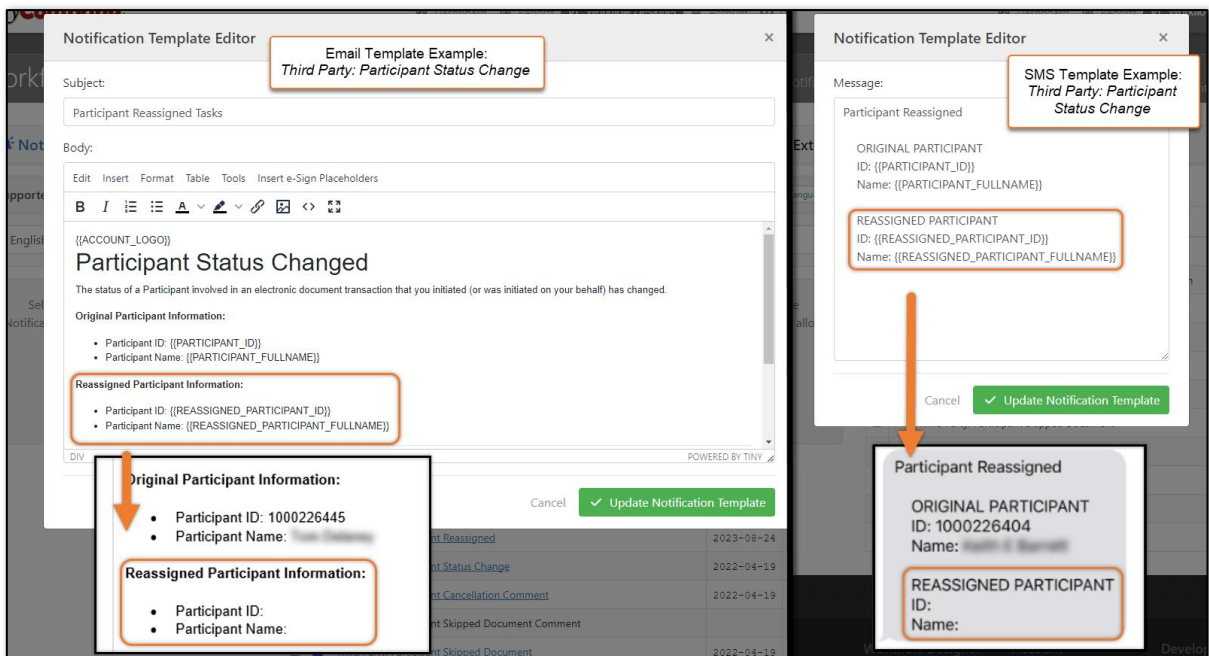


[PEP-7211] - Fixed issue where users were not able to edit the properties of a delivery or carbon copy task. Please see the image below for an example and the settings referenced.

Release Notes



[PEP-7177] - Fixed issue where the Reassigned Participant ID & Name are missing from SMS and Email Event Notifications. Please see the image below for the referenced settings.



Release Notes

[PEP-7170] - Fixed issue where DocForm checkboxes would lose their checked value in the document if its ExportValue or Checked Value was not "Yes", "Off" or Null. Checkboxes will now be able to support custom values rather than just "Yes", "On", "Off" or Null. Please see the image below for the referenced settings.

The screenshot shows the 'Tasks Editor' interface for 'MyCompany NDA1'. In the 'DocForms Field Placement' panel, the 'Checkbox' option is selected and highlighted with an orange box. An orange arrow points from this selection to the 'Edit Form Field Details' dialog box. In the dialog, the 'Basic Information' tab is active. The 'Field Type' is set to 'Checkbox'. The 'Participant' is 'Signer 1'. The 'Field Name' is 'CheckboxField1'. The 'Actual PDF Field Name' is 'CheckboxField1 as Signer 1'. The 'Checked Value' is set to 'Yes' and is highlighted with an orange box. Below this, there are checkboxes for 'Selected' and 'Required', both of which are currently unchecked.

v5.17.5 Release

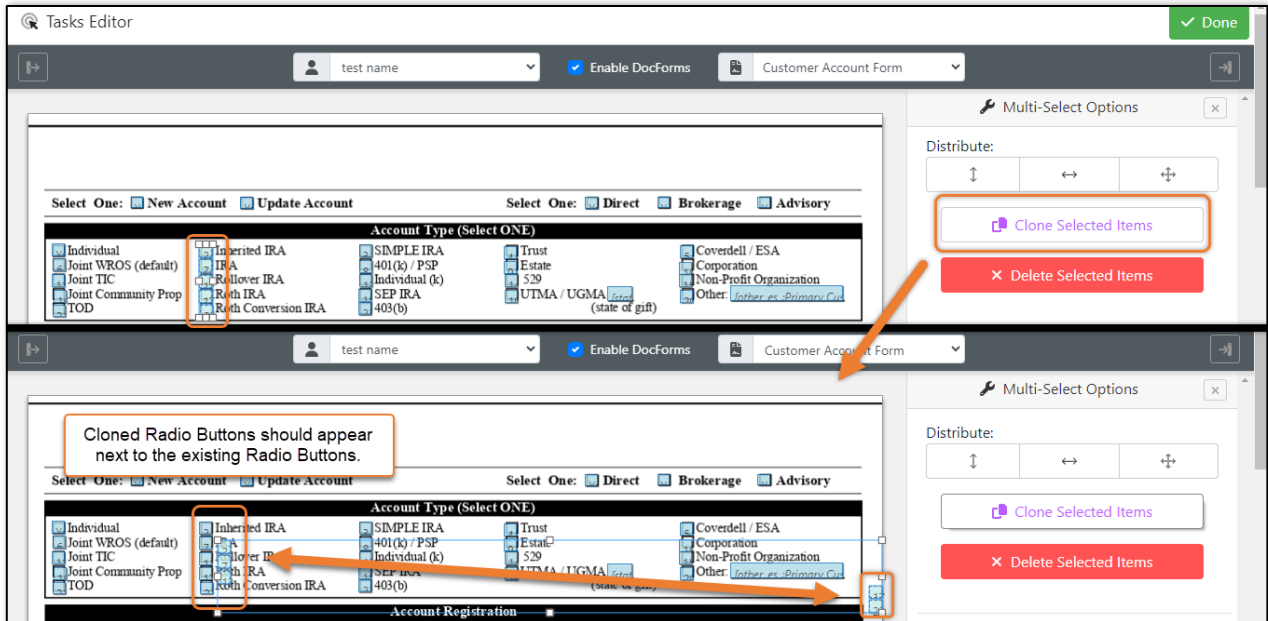
Release Date: 9/5/2023

Bug Fixes

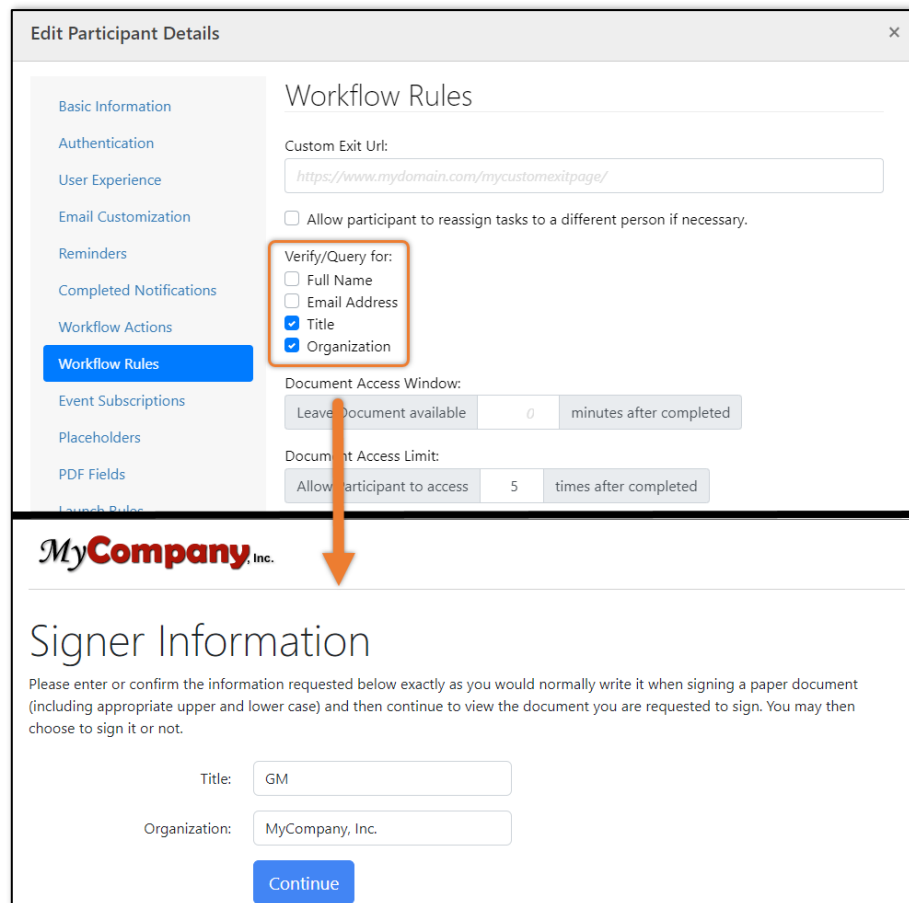
[PEP-7192] - Fixed issue where PDF documents were not being merged properly.

[PEP-7186] - Fixed issue where copied DocForm elements would not be positioned correctly. Please see the example image below for additional details.

Release Notes

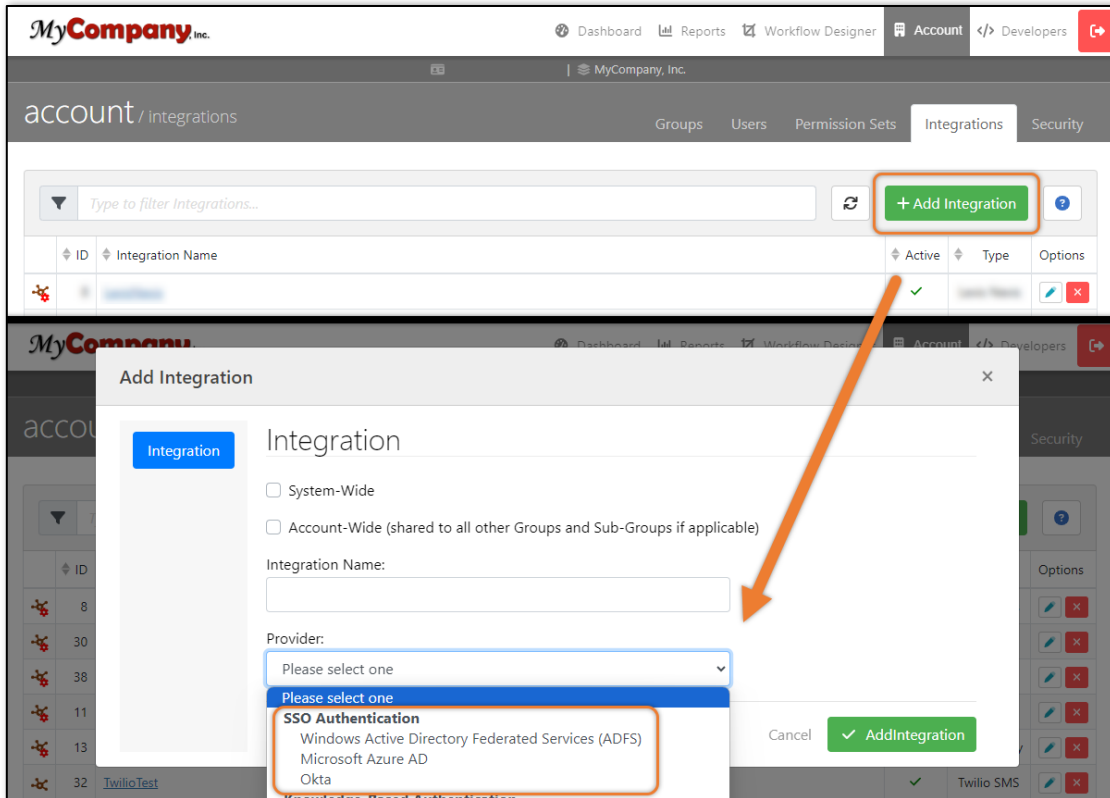


[PEP-7180] - Fixed issue where Participant's Titles were not being updated during the Signer Information step in a workflow. Please see the image below for the referenced settings and example Signer Information Page.



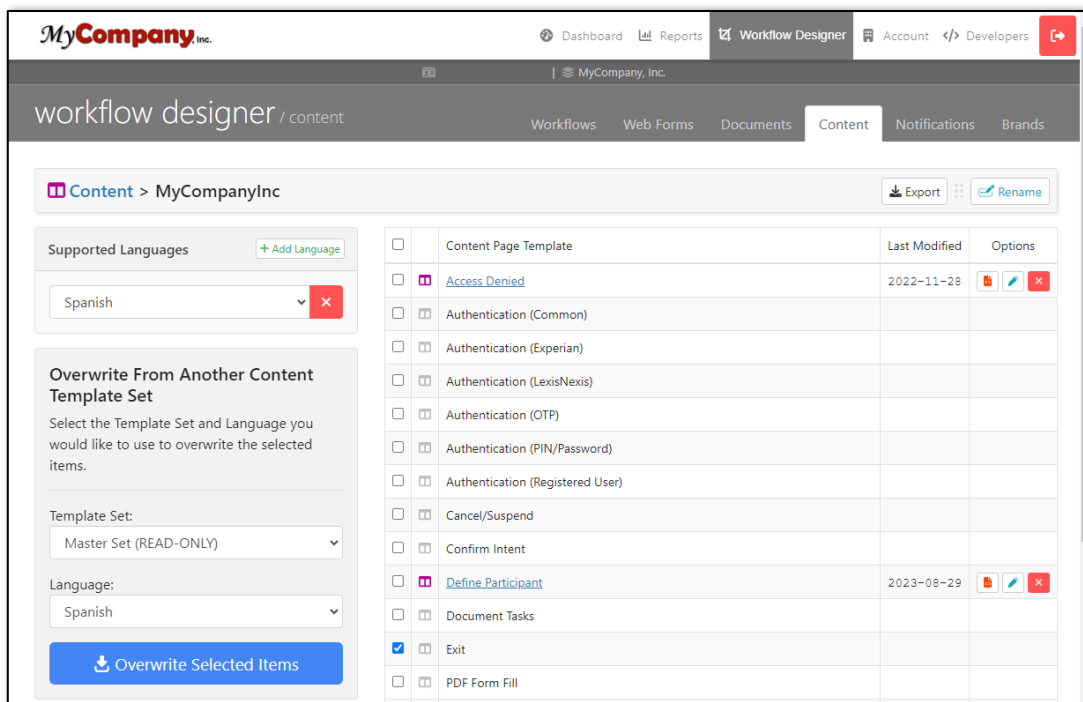
[PEP-7164] - Fixed issue where after failing to validate the client's SSO token, the software is returning null and providing no further detail, making it difficult to troubleshoot. Added additional logging and error messaging to the SSO login. Please see the image below for the referenced settings.

Release Notes



[PEP-7138] - Fixed issue where when attempting to saving large Workflows the exit warning message “Are you sure you want to leave without saving?” would appear. If you then clicked on the Cancel option, document save errors would display.

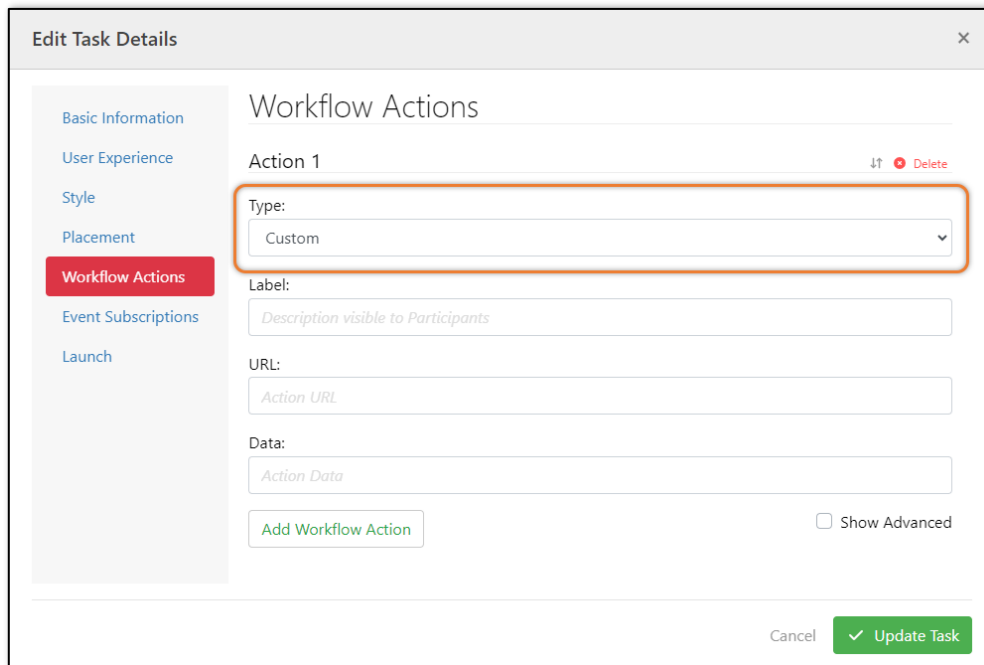
[PEP-7121] - Fixed issue where Content Page Templates were failing to retrieve successfully under certain conditions such as when attempting to overwrite in a different language. See the example image below for more detail.



Release Notes

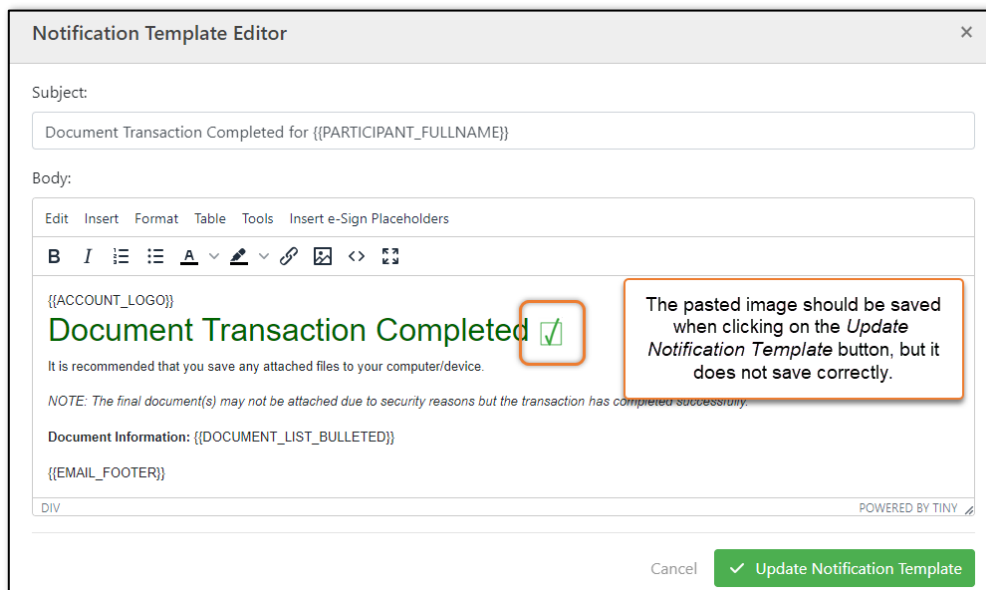
Bug Fixes

[PEP-7166] - Fixed issue where required Custom Task Workflow Actions would cause Workflows to get stuck at the Custom Workflow Action. Please see the image below for the Custom Workflow Actions settings referenced.



The screenshot shows the 'Edit Task Details' dialog box with the 'Workflow Actions' tab selected. The 'Type' dropdown menu is highlighted with an orange box and set to 'Custom'. Other fields include 'Label', 'URL', and 'Data'. A green 'Update Task' button is at the bottom right.

[PEP-7141] - Fixed issues where when a user pasted images from their clipboard into template editors, it wouldn't save the images properly. This affected editors such as Content Editor and Email Template Editor. See the example image below for more detail.

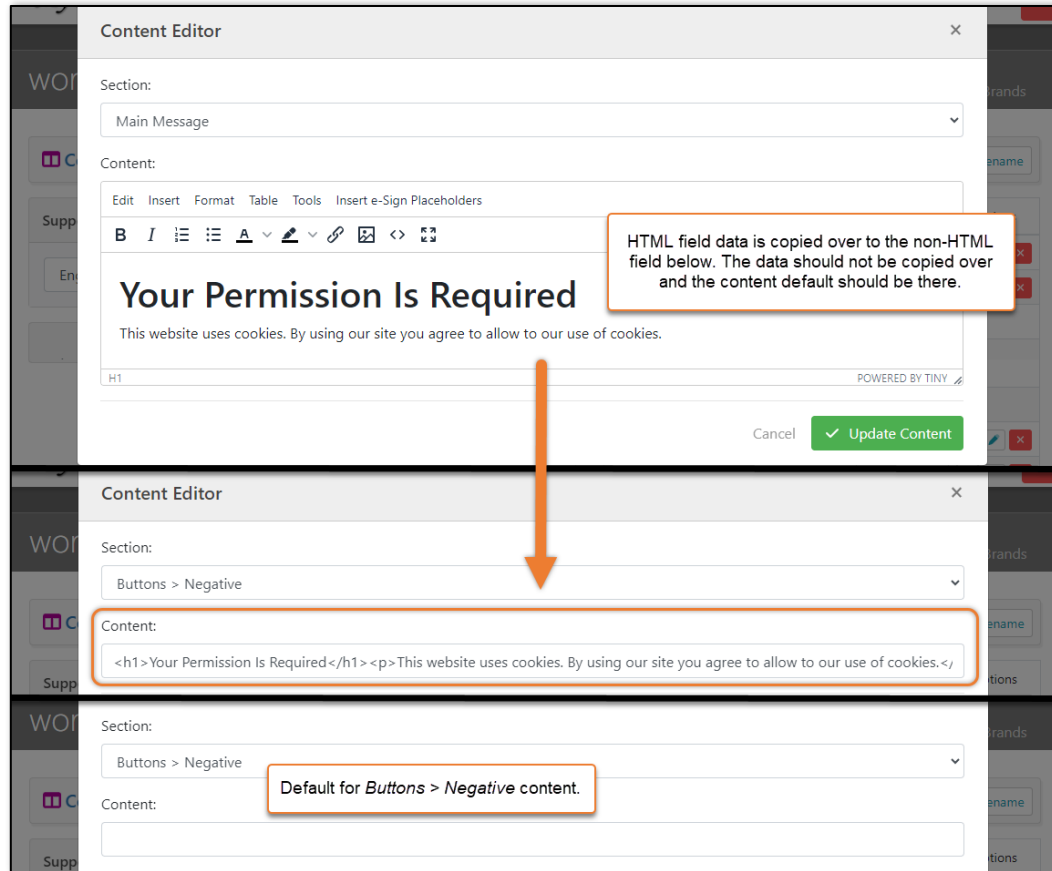


The screenshot shows the 'Notification Template Editor' dialog box. The 'Body' field contains a placeholder for an image, which is highlighted with an orange box. A text box next to it states: "The pasted image should be saved when clicking on the Update Notification Template button, but it does not save correctly." A green 'Update Notification Template' button is at the bottom right.

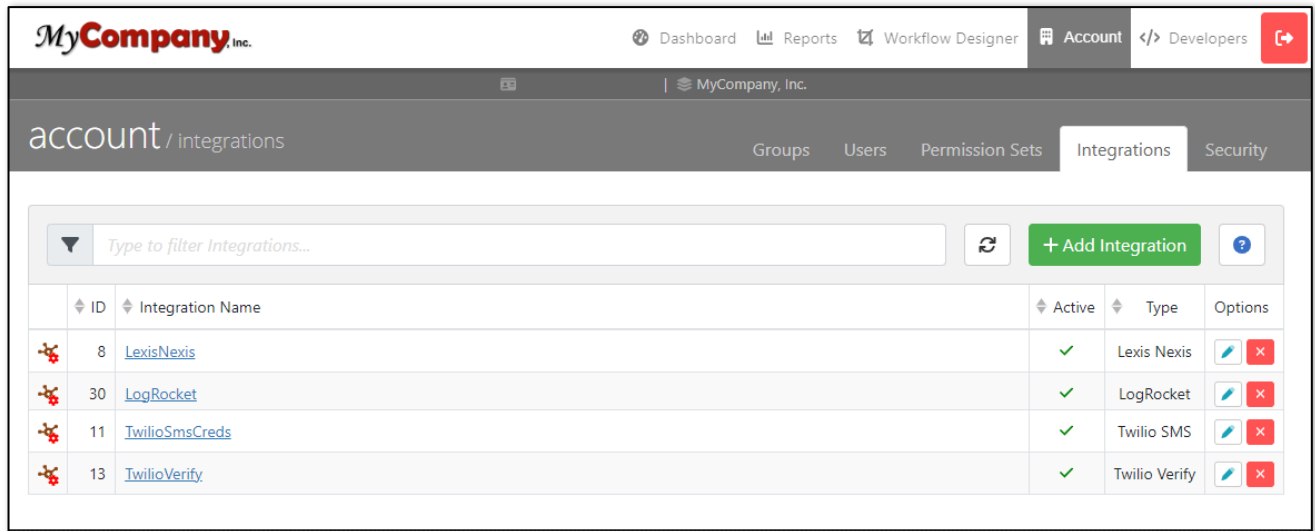
[PEP-7123] - Fixed issue where a security fix caused the denial of X-Frame-Options from the web.config. Removed the DENY setting in the Sign application to allow iframing.

[PEP-7118] - Fixed issue where Content Editor values would be copied from one section to another, when switching from a HTML field to a non-HTML field. Please see the image below for more details.

Release Notes



[PEP-7106] - Fixed issue where the Integrations tab would periodically fail to load. Please see the image below for the Integrations tab referenced.



[PEP-7065] - Fixed issue where Event Subscription notifications were not being sent for Participant Reassigned event. Also fixed issue where Skipped Document event notifications were being sent out incorrectly as Status Changed Event notifications. Please see the image below for the referenced settings.

Release Notes

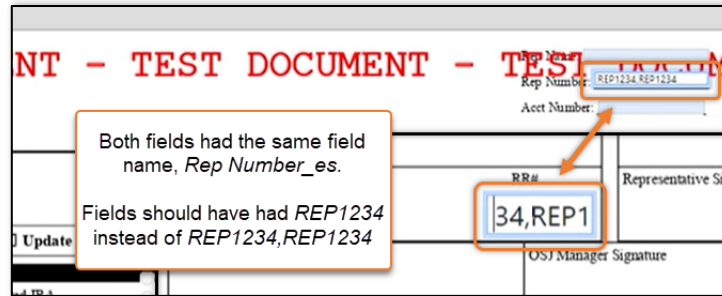
The image displays two screenshots of a software interface, specifically the 'Edit Participant Details' and 'Edit Workflow Details' windows. Both windows show the 'Event Subscriptions' section. In the 'Edit Participant Details' window, the 'Type' dropdown menu is highlighted with an orange box and set to 'Participant Reassigned'. In the 'Edit Workflow Details' window, the 'Type' dropdown menu is also highlighted with an orange box and set to 'Skipped Document Event'. Both windows show a 'Subscription 1' entry with a 'Delete' button. The 'Edit Workflow Details' window also includes a 'Show Advanced' checkbox and an 'Add Event Subscription' button.

[PEP-6972] - Fixed issue where when upgrading software versions, older Workflows utilizing One-Time Passcode (previously known as Mobile) would see the participant validation (*Send As*) not properly set in the UI. Please see the image below for additional details.

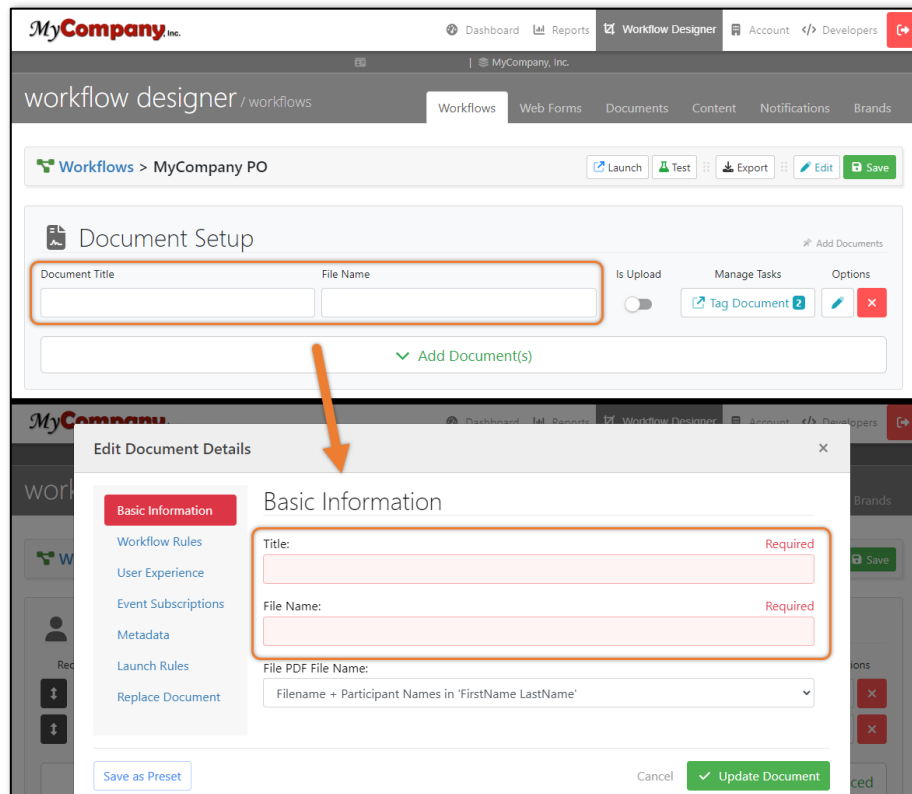
The image shows a screenshot of the 'Edit Participant Details' window, specifically the 'Authentication' section. The 'Type' dropdown menu is highlighted with an orange box and set to 'One-Time Passcode'. Below it, the 'Send As' dropdown menu is also highlighted with an orange box and shows a list of options: '-- Select a Send Type --', '-- Select a Send Type --', Email, Sms, and Email and Sms. An orange arrow points to the 'Send As' dropdown, and a red 'Required' label is next to it. The 'Use two-factor authentication.' checkbox is also visible.

[PEP-6524] - Fixed issue where duplicate fields with the same name would incorrectly have their values duplicate in the fields when utilizing the Bulk Launch feature. Please see the image below for an example.

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[PEP-6312] - Fixed issue where a Document Title and File Name was not required in the Workflow Designer even though it is required in the Document Details. A Document Title and File Name will now be required in the Workflow Designer. Please see the image below for more details.



v5.17.3 Release

Release Date: 8/10/2023

Bug Fixes

[PEP-7096] - Fixed issue where a misleading `InvalidOperationException` was thrown when async operations didn't finish correctly.

[PEP-7084] - Fixed issue where validation for Document Integrity would not allow for any value to be set. The setting would only accept a blank value. Please see the image below for the referenced setting.

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The screenshot shows the 'Edit Group' dialog box with the 'Document Integrity' tab selected. The left sidebar lists various settings categories: Basic Information, Document Integrity (highlighted), Security, Privacy Policy, User Experience, Logo, Multi-Factor Authentication, and Email Services. The main content area is titled 'Document Integrity' and includes a 'Document Retention' dropdown menu set to 'Purge at specified # of days after 'Completed''. Below this is a 'Retention Days Before Purge' input field, which is highlighted with an orange box, showing a value of 0 and a range of 'min: 0 / max: forever (blank)'. A yellow tooltip box explains that this value represents the number of days documents will be deleted from the server after reaching 'Completed' status, with 365 days representing one year. At the bottom, there is a section for 'Enforce Digital Signature' with a message stating 'Embedded PDF digital signatures have not been configured for this system.' The dialog box has 'Cancel' and 'Update Group' buttons at the bottom right.

[PEP-7067] - Fixed issue where the label text may cause confusion in the Transaction Details Participants tab. Changed Participants tab text from `in this document` to `for this participant`. Please see the image below for a comparison of the changes.

This block contains two side-by-side screenshots of the 'MyCompany Inc.' interface, separated by a vertical line. An orange arrow points from the left screenshot to the right one, indicating a change. The left screenshot shows a task list with the header 'THERE ARE 2 TASKS IN THIS DOCUMENT' highlighted by an orange box. Below the header, there are two task entries: 'Acknowledgement: MyCompany NDA' and 'Initials: MyCompany NDA'. Each task entry displays fields for Task ID, Type, Status / ID, and Document Title. The right screenshot shows the same task list but with the header changed to 'THERE ARE 2 TASKS FOR THIS PARTICIPANT', also highlighted by an orange box. The task entries are now 'Acknowledgement: TestPDF' and 'Signature: TestPDF', maintaining the same field structure as the left screenshot.

[PEP-7029] - Fixed issue where the Custom Email Message would not display on the Launch Page if there were no other required fields for a Participant. Please see the images below for the referenced setting and an example of the Launch Page.

Release Notes

Edit Participant Details

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Launch Display

Launch Domain Restrictions

Launch Labels

Launch Rules

☐ This Participant is optional at launch.

☒ Allow custom email message by launcher.

Input Type:

Launch process will use the fixed Participant information entered below.

Full Name:

PO Approver

Email Address:

Phone Number:

Title:

Organization:

Save as Preset

Cancel

Update Participant

dashboard

Quick Stats

Workflow Templates

Pending Signatures

Workflow Templates > Launch

Bulk Launch

Test

MyCompany PO: 22062

PO Approver

Custom Email Message (optional):

Edit Insert Format Table Tools

B I

POWERED BY TINY

Send Workflow

[PEP-6949] - Fixed issue where auto-complete would not be fully disabled when turned off. Added autocomplete="off" properties to all login and data collection fields during signing process in workflows.

[PEP-6851] - Fixed issue where a typo was seen in one of the Input Type options on the Participant Details pop-up. Please see the image below for the referenced settings.

Release Notes

Edit Participant Details

Launch Rules

☐ This Participant is optional at launch.

Input Type:

- Launch process will use the launcher's information for the props.participant.
- Launcher will manually enter Participant information.
- Launch process will use the fixed Participant information entered below.
- Launch process will use the launcher's information for the props.participant.**
- Launcher will select from a list of options (specified below).
- This Participant's information will be defined by another Participant.

Should be 'Participant' and not 'props.participant'.

[Save as Preset](#) [Cancel](#) [Update Participant](#)

[PEP-6313] - Fixed issue where when deleting Metadata, the values of the first Metadata name-value pair would be deleted instead of the selected Metadata name-value pair. This issue only occurred on the Workflow Details pop-up. Please see the example image below for additional details.

Edit Workflow Details

Metadata

Metadata 1 [Delete](#)

Name: data1

Value: value1

Metadata 2 [Delete](#)

Name: data2

Value: value2

Metadata 3 [Delete](#)

Name: data3

Value: value3

[Add Metadata](#)

[Save as Preset](#) [Cancel](#) [Update Workflow](#)

Metadata

Metadata 1 [Delete](#)

Name: data2

Value: value2

Metadata 2 [Delete](#)

Name: data3

Value: value3

[Add Metadata](#)

[Cancel](#) [Update Workflow](#)

Metadata 2 should have been deleted instead of replacing the values of Metadata 1.

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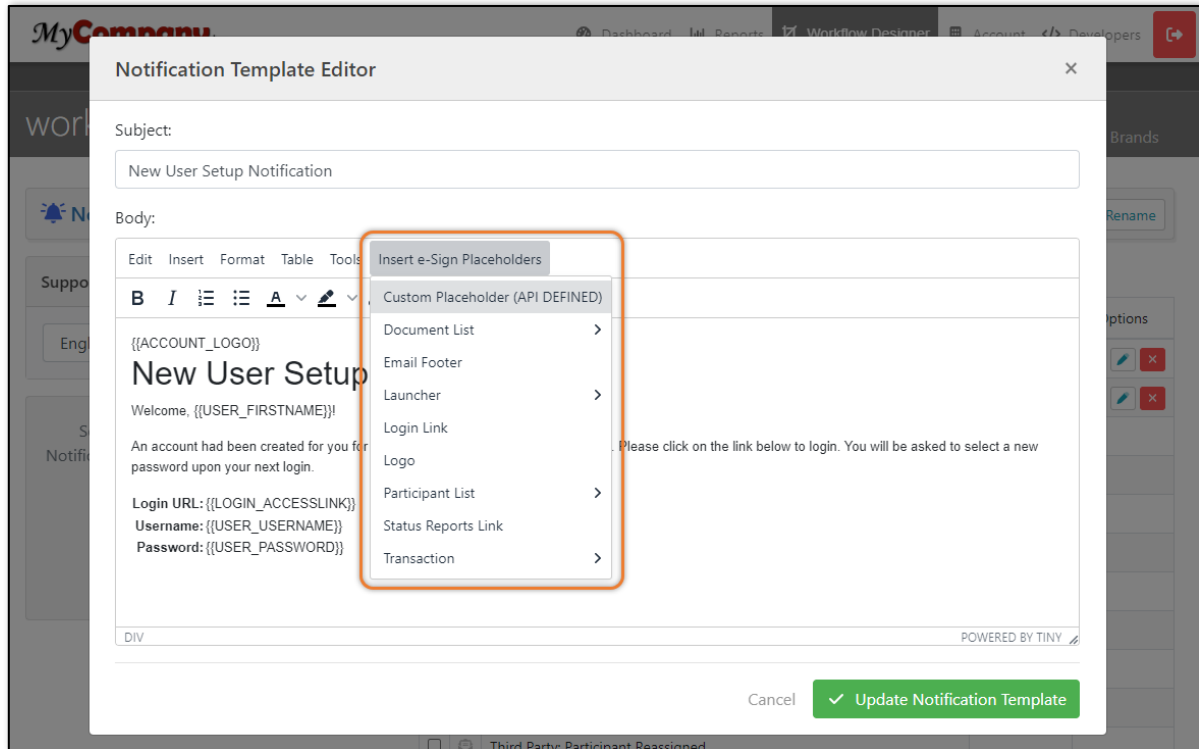
v5.17.2 Release

Release Date: 8/3/2023

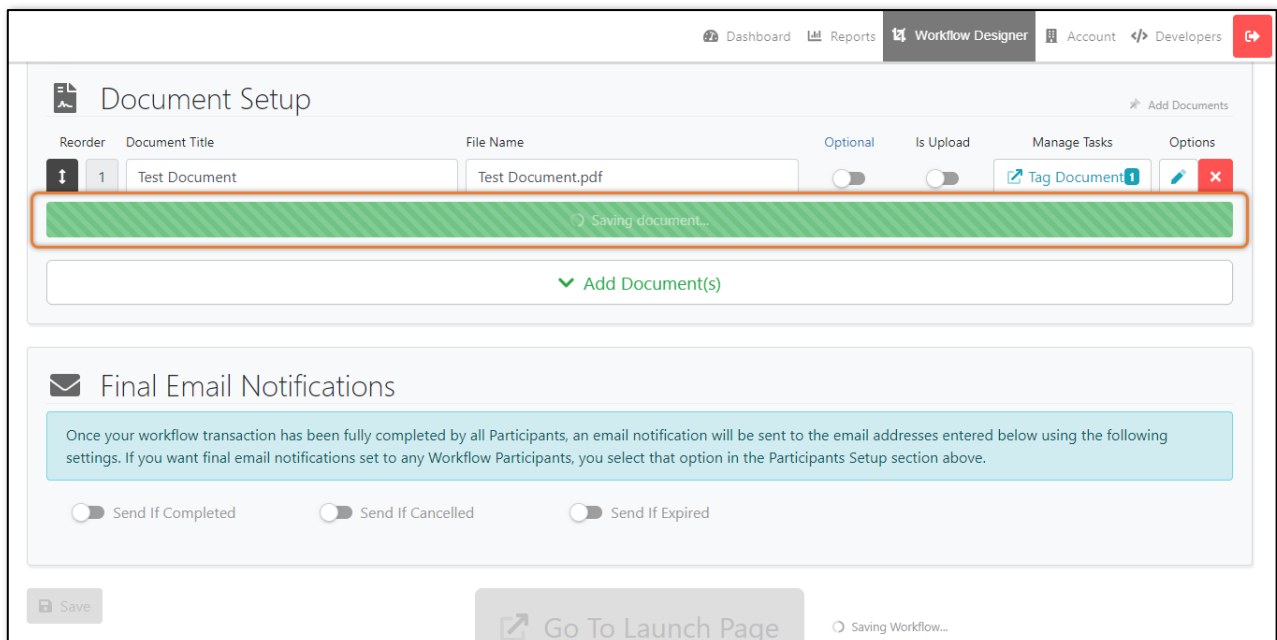
Bug Fixes

[PEP-7057] - Fixed issue where licensing failed during the installation process because it could not read/write configuration settings properly.

[PEP-7044] - Fixed issue where some placeholders were not being shown or shown incorrectly as options in the Workflow Designer > Notifications editor. Please see the image below for the referenced setting.



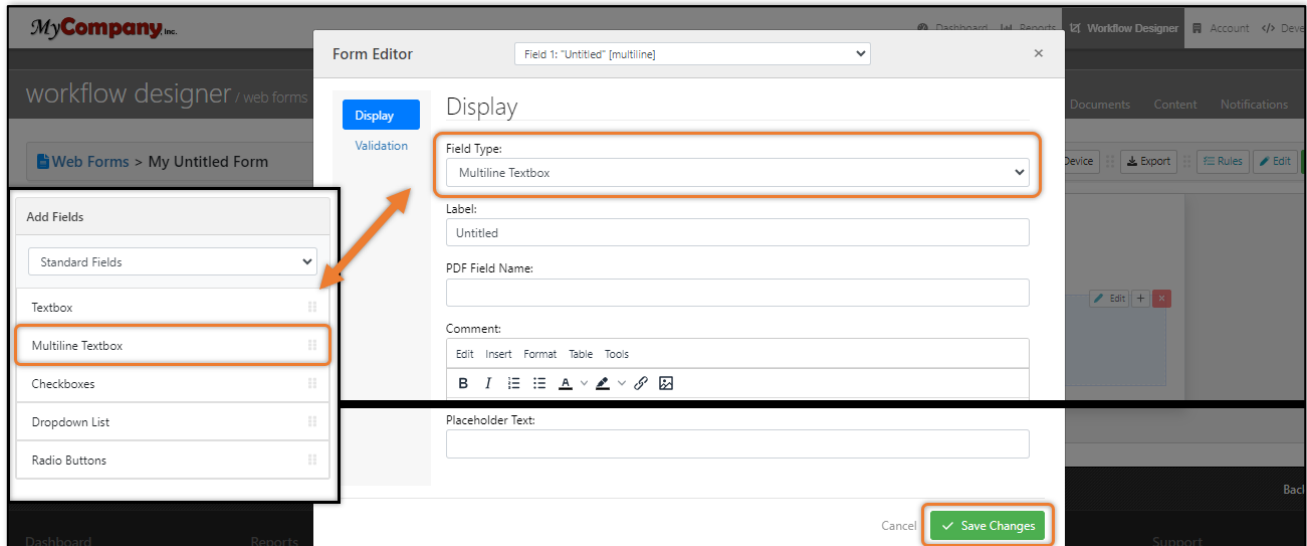
[PEP-7034] - Fixed issue where document saving and preset application indicators were not showing. Please see the image below for an example of the saving indicator referenced.



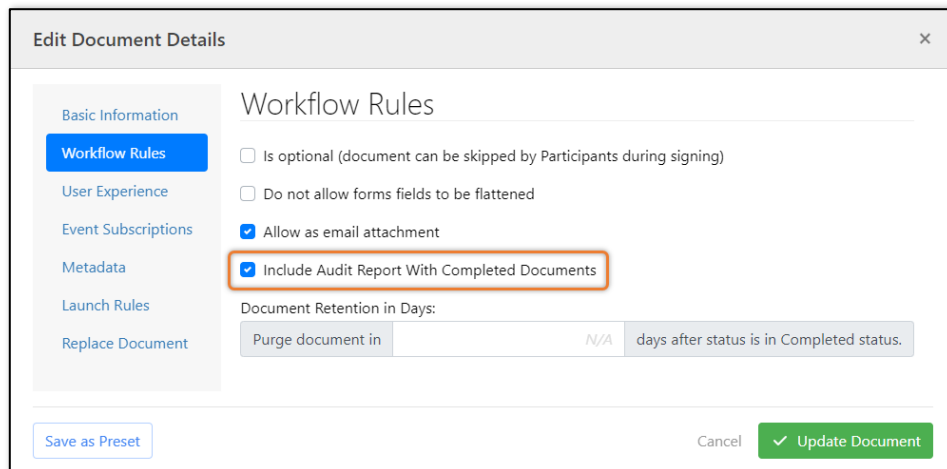
[PEP-7015] - Fixed issue where the ADFS login page would not load correctly.

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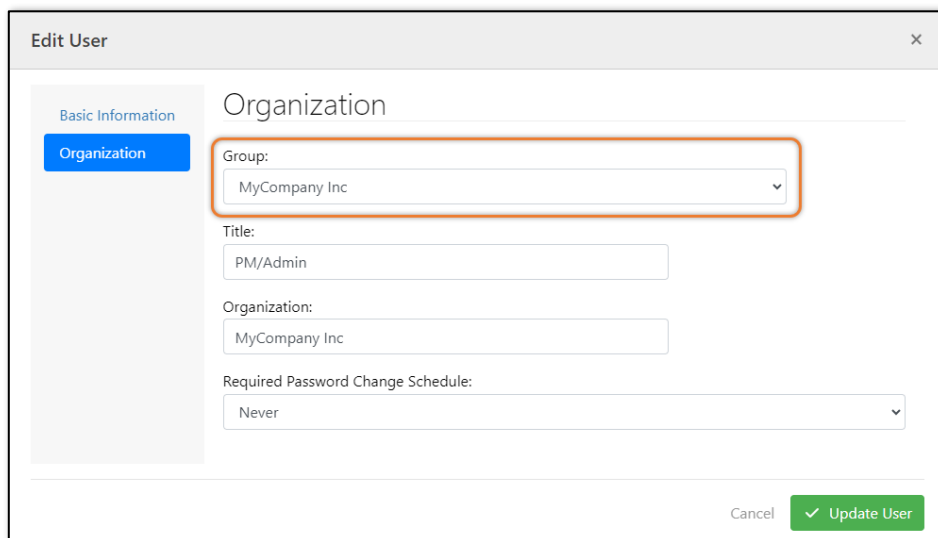
[PEP-7013] - Fixed issue where Multiline Textboxes, in a Web form, would not save correctly when clicking on the *Save Changes* button. Please see the image below for more details.



[PEP-7012] - Fixed issue where final email notifications were not being sent out when the Audit Report was set to be included. Please see the image below for the referenced setting.

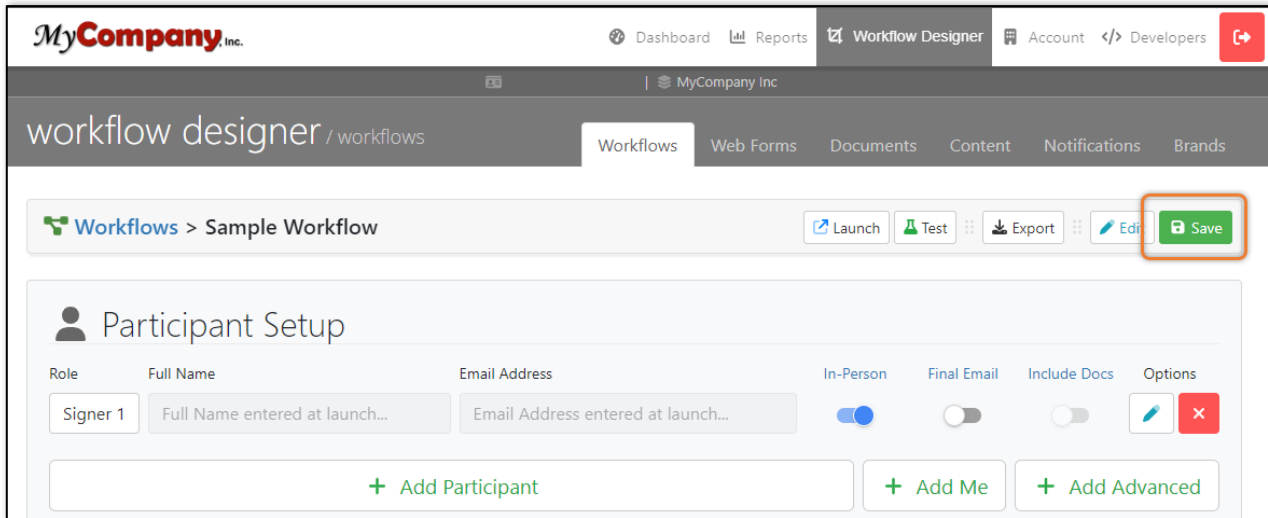


[PEP-7011] - Fixed issue where a users' group could not be updated and or changed to another group or sub-group. Please see the image below for the referenced setting.



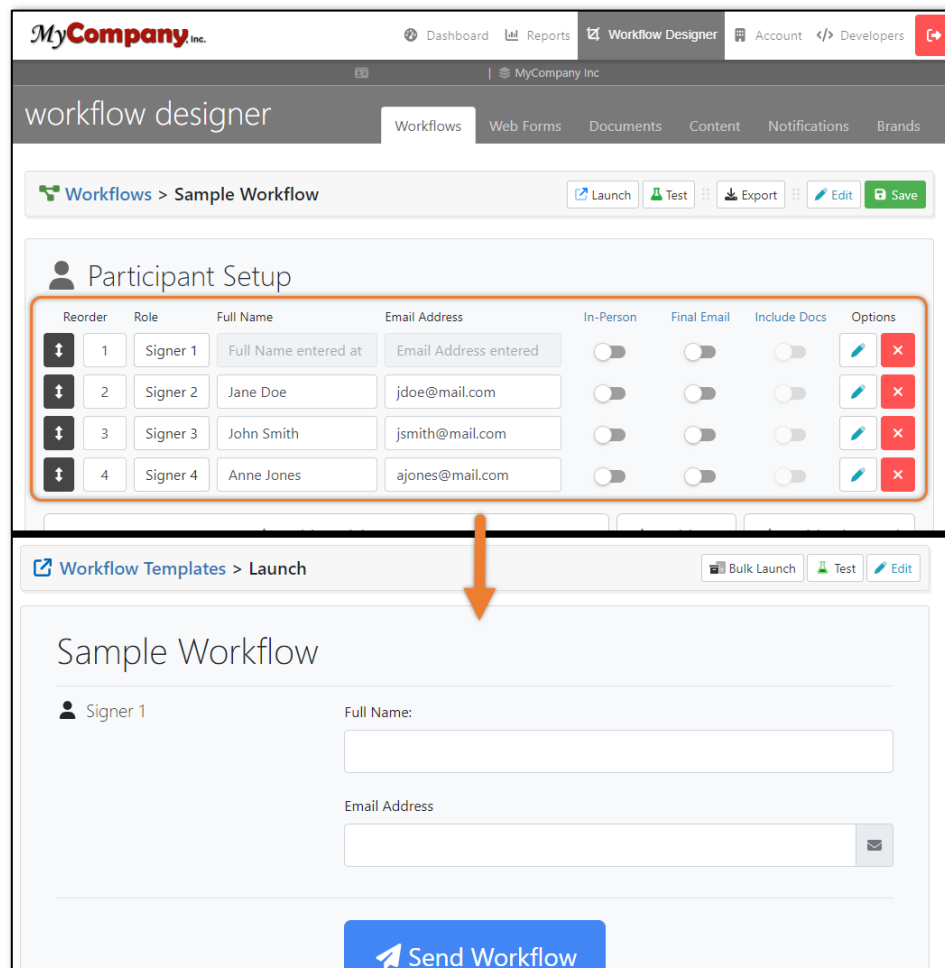
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[PEP-7009] - Fixed issue where when editing a workflow, the save button would prematurely be available. Please see the image below for the save button referenced.



[PEP-6987] - Fixed issue where there were intermittent issues of documents failing to save in the one-minute timeout. Increased the saving timeouts for documents to reduce the chance of timeout errors.

[PEP-6977] - Fixed issue where additional border dividers appeared for participants that aren't displayed on the Workflow Launch page. Please see the example settings and Launch page below that appear without additional dividers.



[PEP-6943] - Fixed issue where a transaction with a delivery-only document would not complete if the digital signature process failed. Please see the image below for the referenced setting.

Release Notes

myCompany Inc.

Tasks Editor

Done

Vendor Signer

Enable DocForms

NDA Internal Version

Task Options

Task Type:
Delivery

Label:

Actual field name in final PDF:

Participant:
Vendor Signer

Edit More Task Properties

Clone Task

Delete Task

Lorem ipsum dolor sit amet, consectetur adipiscing elit

Vivamus commodo lacinia mollis. Aenean ut tellus vestibulum, molestie urna eu, facilisis eros. Quisque aliquam, nisi sit amet pretium posuere, sapien ex eleifend lacus, a pellentesque lectus velit sit amet diam. Praesent imperdiet leo quis hendrerit consectetur. Phasellus rhoncus felis at risus dictum blandit. Quisque libero velit, scelerisque nec augue a, convallis conseqat mollis. Duis feugiat sed risus imperdiet venenatis. Praesent et vestibulum leo. Nulla rhoncus tristique orci non vestibulum. Aenean sagittis, dolor vitae maximus pharetra, ligula purus molestie justo, a maximus sem dolor vitae nulla. Etiam scelerisque enim id ligula laoreet dictum sit amet quis ex. Sed tellus risus, consectetur et sodales sed, lobortis sed massa. Vivamus volutpat sit amet ante rutrum ultrices. Suspendisse porta purus turpis, vitae congue neque eusmod a. Sed commodo odio ac felis suscipit feugiat. Suspendisse potenti.

Integer convallis, felis tempus eusmod accumsan, lorem enim vehicula mauris, vitae accumsan eros justo eu augue. Vivamus sollicitudin lacus et risi fringilla, sit amet bibendum metus vestibulum. Proin pellentesque auctor aliquam. Proin dignissim, nulla vestibulum aliquet pharetra, velit est ultrices tortor, id congue nisl turpis gravida lacus. Fusce commodo risus sed nibh lacus, maximus eusmod ex auctor. Donec libero ante, dignissim quis maximus vitae, finibus ac augue. Etiam auctor nec sem eu mattis. Quisque rutrum justo id mollis efficitur. Proin id accumsan nunc.

Aliquam erat volutpat. Ut ante purus, faucibus nec rutrum eget, finibus vitae mauris. Integer tristique, magna quis ullamcorper scelerisque, enim ex vestibulum tortor, eget dapibus ipsum augue non erat. Nunc commodo vehicula hendrerit. Duis in nisl ac lectus vestibulum venenatis quis quis sem. Integer urna odio, tincidunt fringilla libero ultrices, ornare ullamcorper dolor. Pellentesque accumsan malesuada ullamcorper. In aliquam sagittis risus, eget elementum nunc feugiat eu. Sed in maximus nunc, quis vulputate mauris. Suspendisse auctor suscipit ex et blandit.

Praesent scelerisque sem ac imperdiet ornare. Sed dignissim erat lacinia, sagittis turpis et, mollis diam. Nullam gravida eusmod nulla malesuada mollis. Fusce arcu nisl, fermentum ut semper in, bibendum quis justo. Proin neque tortor, cursus eget tincidunt in, scelerisque vitae velit. Cras arcu leo, suscipit vel orci id dictum consequat massa. Curabitur posuere ante justo, id aculis ex fomentum vel. In convallis lectus et felis volutpat, eu sollicitudin erat imperdiet. Integer et congue dolor.

Internal Approver Initials: _____

Signature: _____