

Legend

Tag	Description
~API/WebServices	Represents an update or change that impacts usage of the AlphaTrust API's
~Access/Permissions	Impacts a user's access and permissions to sections of AlphaTrust.
~AuditReport	Represents an update or change that impacts usage of the AlphaTrust Audit Report.
~Authentication	Impacts additional Authentication that can be set for Participants or Workflows.
~BrandSets	Represents a change to the screen design/theme that can be customized on brand page templates.
~ContentSets	Represents a change to the screen text that can be customized on content page templates.
~ControlPanel	Represents a change to the functionality of the control panel user interface or workflow configuration via the user interface.
~Documentation	Represents an update or change that impacts the AlphaTrust documentation.
~Documents	Impacts Document processing, settings, etc.
~Emails	Impacts email notifications for basic and additional tasks for Participant or Workflows.
~EventSubscriptions	Impacts additional notifications that can be set for Participants or Workflows.
~Forms	Impacts the user experience or behaviour of DocForms or Web Forms functionality.
~Groups	Impacts Groups and Group settings.
~Infrastructure	Impacts the hosting of the AlphaTrust application and /or related system dependencies including the installer.
~Installer	Impacts the installation of the AlphaTrust application.
~Integrations	Impacts integrations settings and integrations with the AlphaTrust application.
~Logging	Represents an update or change to how AlphaTrust logs errors and items related to logging.
~Metadata	Impacts Metadata settings.
~Notifications	Represents an update or change that impacts usage of the AlphaTrust Notifications.
~Reports	Impacts the audit reports, or other system generated documents and reporting.
~Security	Represents an update or change to Security related items for AlphaTrust.
~Signatures	Impacts signatures and signature settings for end users.
~Signing	Impacts the signing experience for end users.
~SMS	Represents a change to SMS functionality, notifications, and settings.
~Support	Represents a change to functionality and settings related to supporting AlphaTrust.
~Transactions	Represents an update or change that impacts Transaction settings, reporting, API calls, etc.
~UI/UX	Represents a change to the front-end portion of AlphaTrust.
~Users	Impacts Users and User settings.
~WorkflowActions	Impacts additional actions that can be set at the Participant and Task level.
~Workflows	Represents a change to the functionality of the workflow configuration via the user interface.

v5.18.13.1 Release

Release Date: 8/30/2024

Bug Fixes

- [PEP-7361] ~ControlPanel ~Forms ~UI/UX

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 a form titled 'My Untitled Form' is being edited. On the left, the 'Add Fields' panel shows a list of field types: Formatted Fields, Number, Currency, Date, and Email Address. The 'Number' field type is highlighted with an orange box. An orange arrow points from this box to the 'Number' field in the form preview on the right. The form preview shows a label 'Number:' followed by a text input field. Below the input field are two buttons: 'Save and Continue' and 'Exit'.

The screenshot shows the 'Form Editor' for 'Field 1: "Number" [number]'. The 'Display' tab is selected, and the 'Validation' section is expanded. 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.

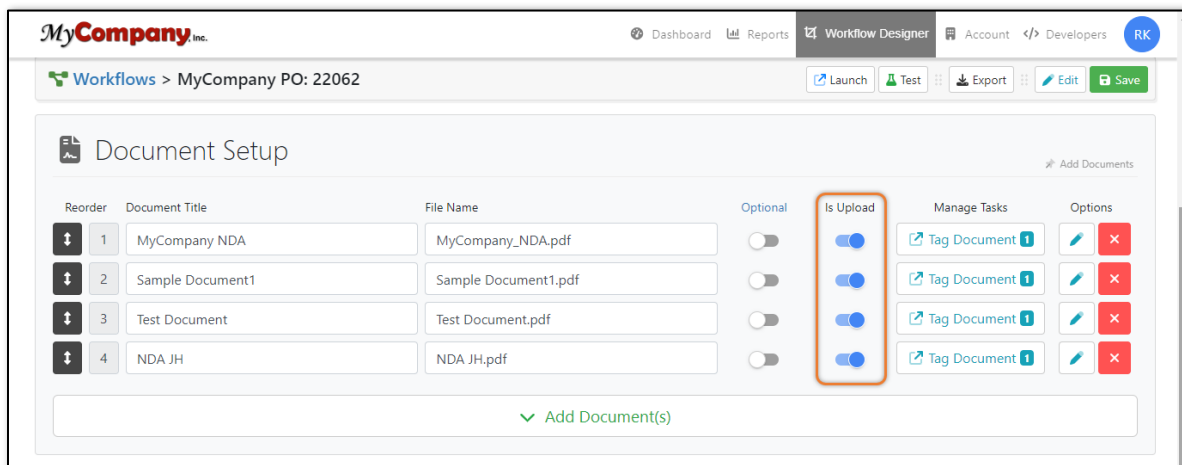
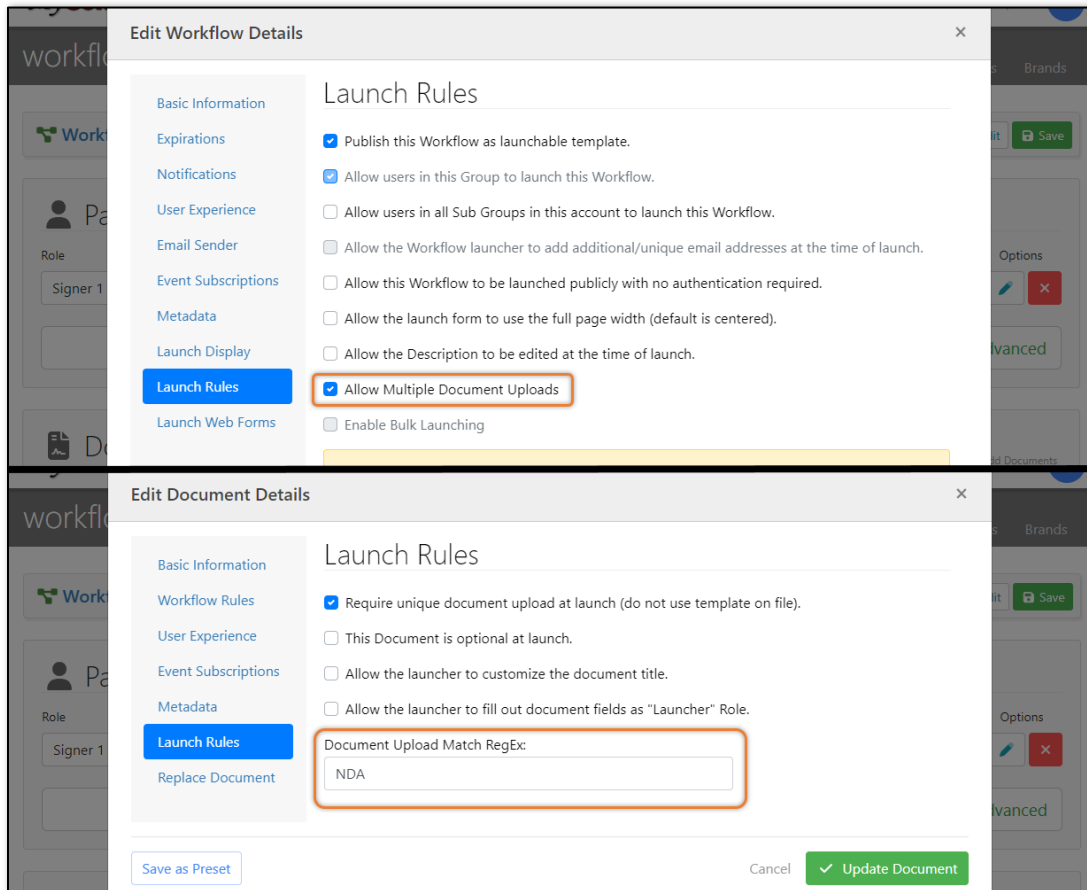
v5.18.13 Release

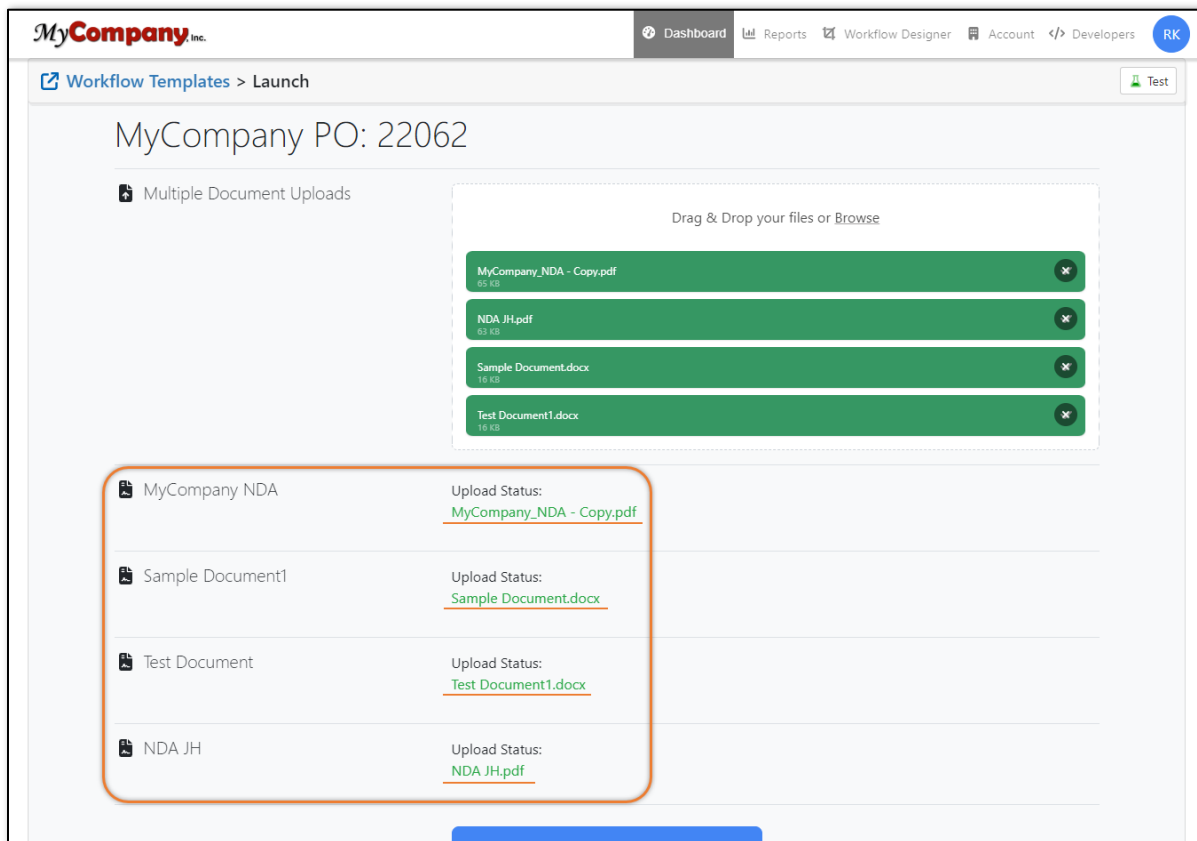
Release Date: 8/15/2024

Bug Fixes

- [PEP-8344] ~ControlPanel ~UI/UX ~Workflows

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.





- [PEP-8222] ~ControlPanel ~UI/UX ~Workflows

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.

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="text"/>
2	Sample Document1	Sample Document1.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="text"/>
3	Test Document	Test Document.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="text"/>
4	NDA JH	NDA JH.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="text"/>

Add Document(s)

• [PEP-8195] ~Forms ~Workflows

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

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

MyCompany, Inc.

Dashboard Reports Workflow Designer Account Developers RK

dashboard / workflow templates Quick Stats Workflow Templates Pending Signatures

Please sign in the order listed below.

Launcher: Rachel Keenan
Please click here to start your signing process

Signer 1: Jane
Please click here to start

Signer 2: John
Please click here to start

← Back to Launch Form

MyCompany, Inc.

Form Fields Test

This is my form. Please fill it out.

Option 1: This is a test comment above the radio button This is another test [Test test testttst https://test.com](https://test.com)

☐

Status: ☐ Married ☐ Single ☐ Divorced

Option 2: ☐

Save and Continue Exit

Launcher is required to fill out a WebForm, but clicks on the Exit button.

reports / status

Transaction Documents Participants Emails Audit Report Event History

Search Results > Transaction Details: Participants

Launcher Workflow

Status of the WebForm Workflow Action is **Cancelled**, but the Participant Status is **Completed** and the Transaction is in a **Pending** Status.

The Participant Status and Transaction Status should be **Cancelled**

Cancel Transaction

PARTICIPANT: Rachel Keenan

Participant ID: [REDACTED]

Transaction ID: [REDACTED]

Status / ID: **Completed / 4**

Full Name: Rachel Keenan

Email Address: [REDACTED]

Title: Customer Success

Organization: [REDACTED]

Send Request via Email: false

Completed Transaction Notification Type: Do not send email

Certification Type: Server

Participant ID	Full Name	Email Address	Phone Number	Status	Options
1	Rachel Keenan	[REDACTED]		Completed	
				Pending	
				Pending	

Workflow Actions for Participant ID: [REDACTED]

THERE IS 1 WORKFLOW ACTION IN THIS Participant

WORKFLOW ACTION: Form Fields Test

Type: Custom

Status: **Cancelled**

Description: Form Fields Test

URL: [REDACTED]

Started Date: 2024-08-13 02:32 PM EDT

Completed Date: 2024-08-13 02:32 PM EDT

v5.18.12 Release

Release Date: 8/1/2024

Bug Fixes

- [PEP-8176] ~ControlPanel ~Workflows

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

Edit Participant Details

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

Launch Rules

Workflow Rules

Custom Exit Url:

<https://www.mydomain.com/my-custom-exit-page/>

Custom Session Timeout Url:

<https://www.mydomain.com/my-custom-session-timeout-page/>

☒ 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

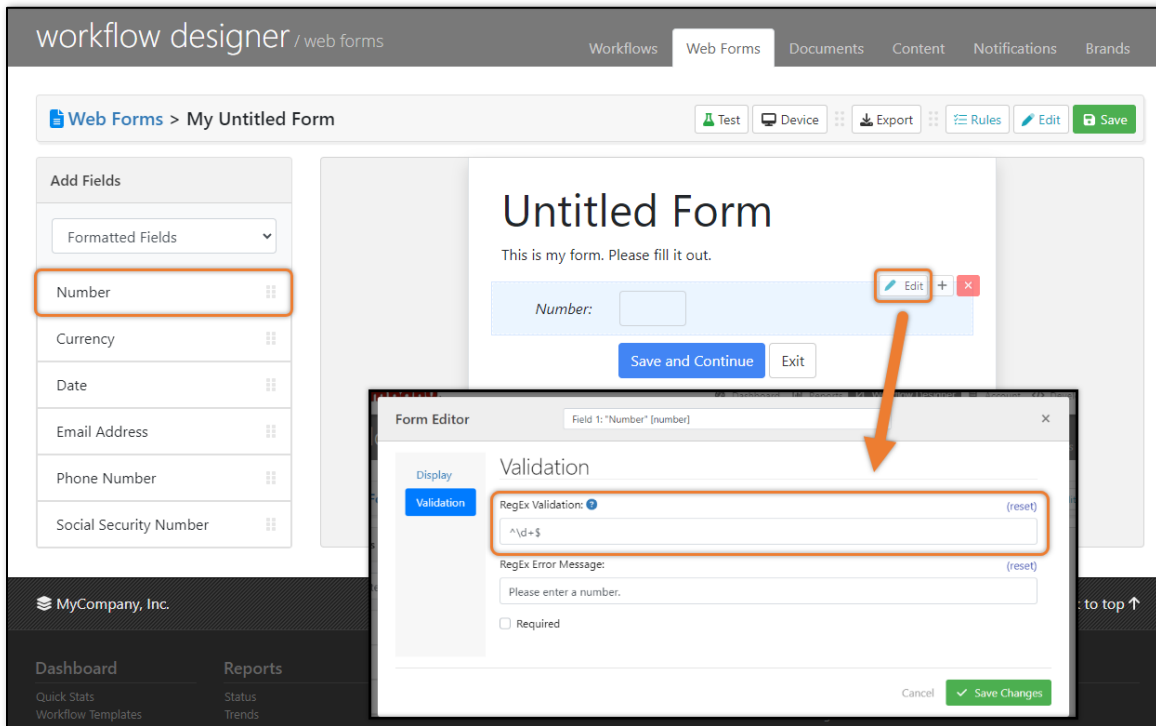
☐ Organization

☐ Signing Location

Document Access Window:

- **[PEP-8174]** ~ControlPanel ~Forms ~UI/UX

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



- **[PEP-8163]** ~ControlPanel ~UI/UX ~Workflows

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.

The image displays two screenshots of the iPipeline software interface, specifically the 'Edit Workflow Details' and 'Edit Document Details' dialog boxes.

Top Screenshot: Edit Workflow Details

- The 'Launch Rules' section is active.
- Settings include:
 - ☒ 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.
- Two settings are highlighted with orange boxes:
 - ☒ Allow Multiple Document Uploads
 - ☒ Enable Bulk Launching

Bottom Screenshot: Edit Document Details

- The 'Launch Rules' section is active.
- Settings include:
 - ☒ 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.
- A text field labeled 'Document Upload Match RegEx:' contains the value 'NDA' and is highlighted with an orange box.
- Buttons at the bottom include 'Save as Preset', 'Cancel', and 'Update Document'.

• **[PEP-8133]** ~Forms ~Workflows

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.

Tasks Editor [Done]

Jane Doe [Enable DocForms] NDA

Vivamus commodo lacinia mollis. Aenean ut tellus vestibulum, molestie uma 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 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 euismod a. Sed commodo odio ac felis suscipit feugiat. Suspendisse potenti.

Integer convallis, felis tempus euismod accumsan, lorem enim vehicula mauris, vitae accumsan eros justo eu augue. Vivamus sollicitudin lacus at nisi fringilla, sit amet bibendum metus vestibulum. Proin pellentesque auctor aliquam. Proin dignissim, nulla vestibulum aliquet pharetra, velit est ultrices tortor, id congue nisi turpis gravida lacus. Fusce commodo risus sed nibh luctus, maximus euismod 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.

Signature: [DropdownListb61b259]
Printed Name: _____
Date: _____
Member ID Number: [Numberca8024ee_es_Customer] [TextBoxcd407d90_es_Customer]

Field List [All Fields]
Click to edit a Field. (Double-click for all properties)

- TextBoxcd407d90 1
- Numberca8024ee 1

2 The second Participant should see the completed fields from the first Participant when completing their assigned fields.

1 First Participant (Jane Doe) enters these fields before the second Participant.

• **[PEP-8040]** ~ControlPanel ~UI/UX ~Workflows

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.

MyCompany Inc. Dashboard [Workflow Designer] Account [Developers] [RK]

workflow designer / workflows

Workflows > MyCompany NDA

Participant Setup

Reorder Role Full Name

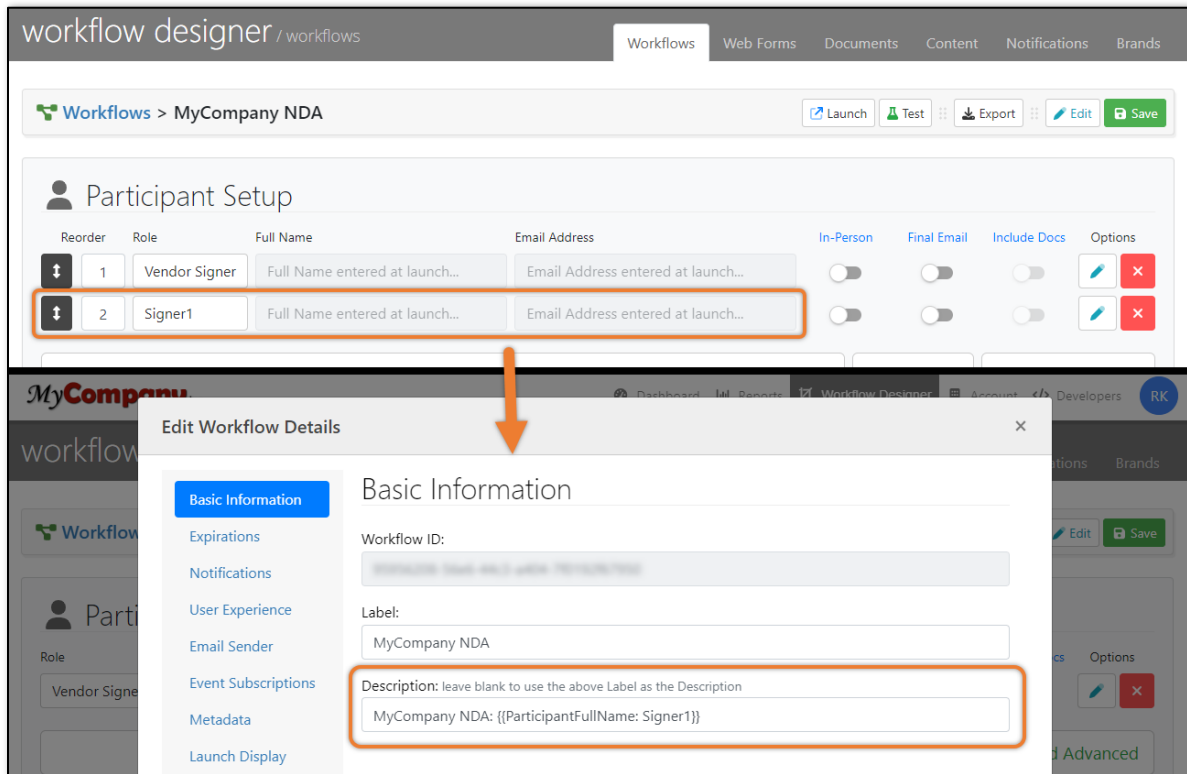
1 Vendor Signer Full Name entered at launch... Email Address entered at launch...

Saving Workflow

Large workflows may take a while; do not close the browser or navigate away until it's completed.

• **[PEP-7896]** ~ControlPanel ~UI/UX ~Workflows

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]** ~Workflows
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]** ~API/WebServices ~ContentSets ~Documents ~WorkflowActions ~Workflows
Fixed issue where task-specific content could no 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.

- **[PEP-6984]** ~API/WebServices ~Signing ~UI/UX ~Workflows

Edit Document Details

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 inN/Adays after status is in Completed status.

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

v5.18.11.2 Release

Release Date: 7/16/2024

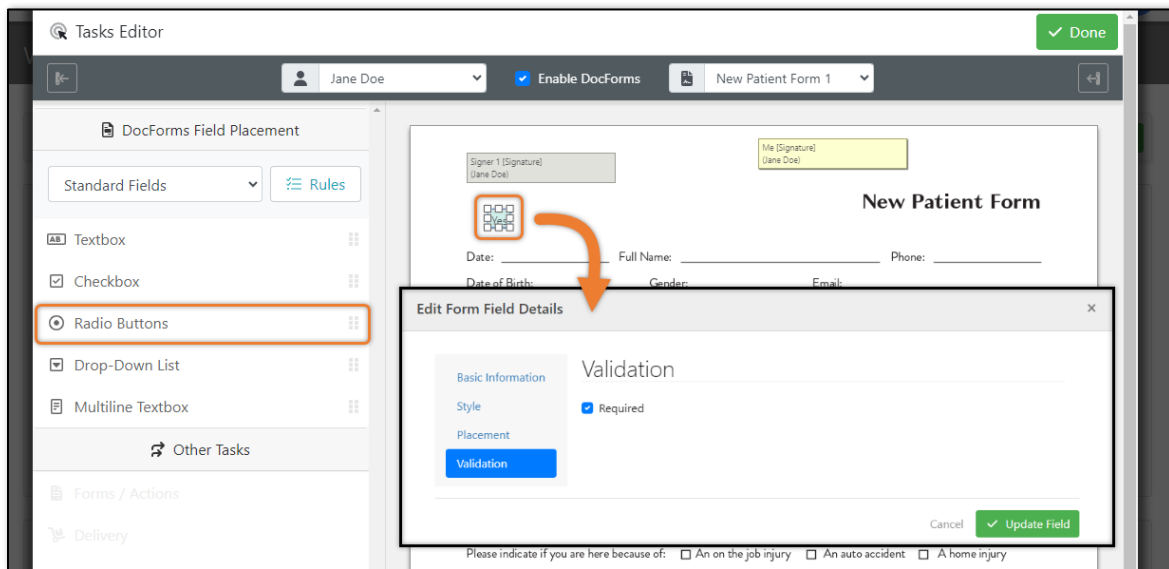
Bug Fixes

- [PEP-8229] ~Emails ~Workflows

Fixed issue where access order checks on Participants would cause emails to not send out as expected.

- [PEP-8119] ~Forms

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.



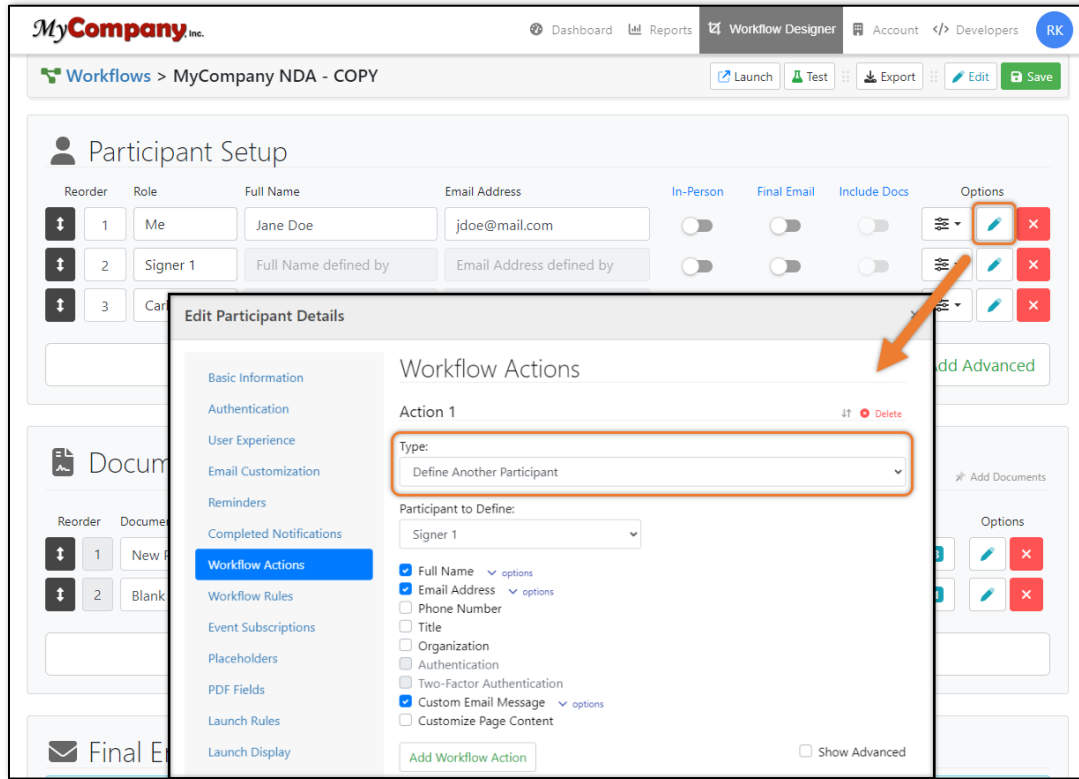
v5.18.11.1 Release

Release Date: 7/12/2024

Bug Fixes

- [PEP-8196] ~ControlPanel ~UI/UX ~Workflows

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.



v5.18.11 Release

Release Date: 6/27/2024

Bug Fixes

- [PEP-8156] ~Forms ~WorkflowActions

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

The screenshot displays the AlphaTrust Tasks Editor interface. At the top, there's a header with the AlphaTrust logo and 'an iPipeline Product' text. The main workspace is divided into several sections:

- Task Placement:** A sidebar on the left with icons for Signature, Initials, Approval, and a button to 'Add Signature Block Data'. Below these are fields for Printed Name, Signature Date, Title, and Organization.
- Task Options:** A panel on the right containing:
 - Task Type:** A dropdown menu set to 'Signature'.
 - Label:** An empty text input field.
 - Actual field name in final PDF:** A text input field containing 'de9a8b07-99b2-33fa-ea16-295ce28e6b2'.
 - Participant:** A dropdown menu set to 'Signer 1'.
 - Application Type:** A dropdown menu set to 'Font-Stamped (Default)'.
 - Optional:** An unchecked checkbox.
 - Buttons:** 'Edit More Task Properties' (highlighted with an orange box and an orange arrow), 'Clone Task', and 'Delete Task'.
- Edit Task Details Modal:** A modal window is open, showing the 'Workflow Actions' tab. It lists 'Action 1' with a 'Type' dropdown set to 'Required'. There are buttons for 'Add Workflow Action', 'Show Advanced', 'Cancel', and 'Update Task'.

• **[PEP-8148] ~Forms**

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.

The screenshot displays the iPipeline Workflow Designer interface. At the top, the navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The main header shows 'workflow designer / web forms'. The left sidebar lists 'Web Forms > My Untitled Form' and a list of fields: Number, Currency, Date, Email Address, Phone Number, and Social Security Number (highlighted with an orange box). The main area shows the 'Untitled Form' with a text input for 'SSN' and a mask 'XXX-XX-XXXX'. The 'Form Editor' modal is open, showing the 'Validation' tab with the same mask and a regular expression for SSN validation. An orange arrow points from the 'Edit' button on the form to the 'Form Editor' modal.

- [PEP-8143] ~Emails ~Workflows

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.

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Workflows > MyCompany NDA - COPY

Launch Test Export Edit Save

Participant Setup

First Participant receives their email, but no other Participant receives their signing emails.

Reorder	Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
1	Carbon Copy	Full Name entered at	Email Address entered at	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/> <input type="text"/>
2	Signer 2	Jane Doe	jdoe@mail.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/> <input type="text"/>
3	Signer 3	Full Name entered at	Email Address entered at	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/> <input type="text"/>

+ Add Participant + Add Me + Add Advanced

Document Setup

Reorder	Document Title	File Name	Optional	Is Upload	Manage Tasks	Options
1	New Patient Form 1	New_Patient_Form_1.pdf	<input type="checkbox"/>	<input type="checkbox"/>	Tag Document 3	<input type="text"/> <input type="text"/> <input type="text"/>
2	Blank Template	Blank Template	<input type="checkbox"/>	<input type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="text"/> <input type="text"/>

+ Add Documents

Tasks Editor

Carbon Copy Enable DocForms New Patient Form 1

Task Placement

- Signature
- Initials
- Approval
- Delivery
- Carbon Copy

Task List

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

Carbon Copy 1

- [PEP-8141] ~API/WebServices

Fixed issue where API calls would allow for double @ symbols in email addresses. Added validation check for double @ symbols in email addresses.

- [PEP-8137] ~Documents ~Forms

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

workflow designer / documents

Workflows Web Forms Documents Content Notifications Brands

Documents > MyCompany

Optimize Flatten Export Rename Save

Add Form Fields

- Textbox
- Checkbox
- Radio Buttons

Field Properties

Select field(s) to edit.

After clicking on the Save button and exiting, the checkboxes are wiped from the document.

Lorem ipsum dolor sit amet, consectetur adipiscing elit

v5.18.10 Release

Release Date: 6/14/2024

Bug Fixes

- [PEP-8123] ~Forms ~Workflows ~WorkflowActions

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.

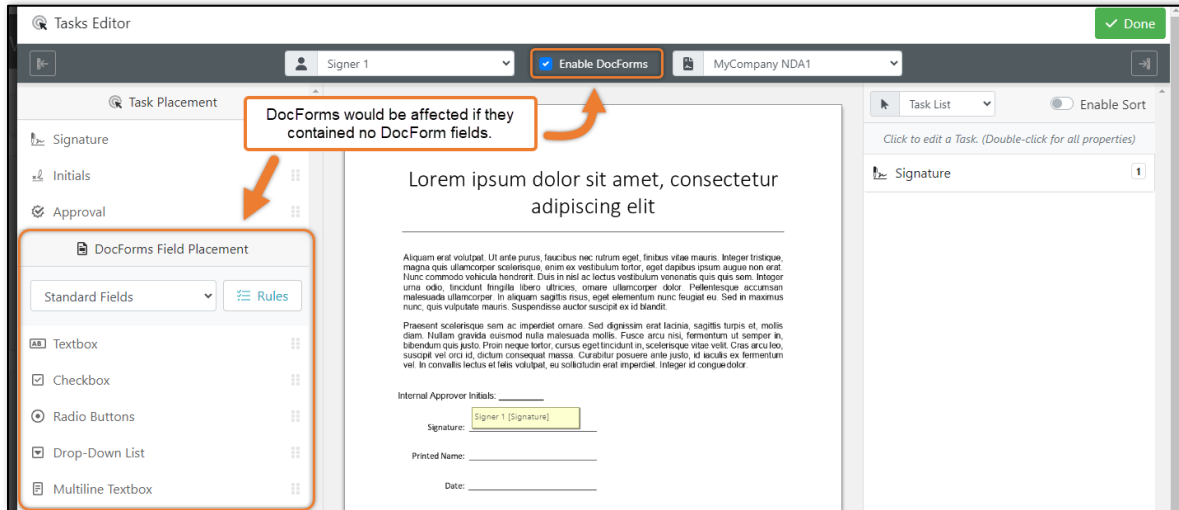
v5.18.9 Release

Release Date: 6/7/2024

Bug Fixes

- [PEP-8110] ~Forms ~Workflows

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.



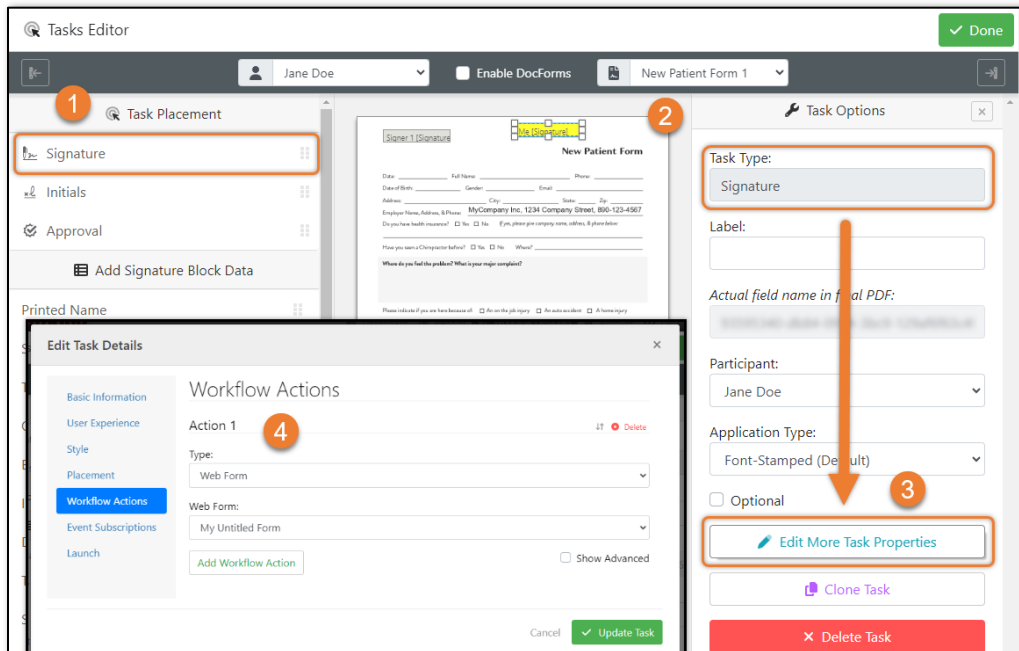
v5.18.8 Release

Release Date: 5/23/2024

Bug Fixes

- [PEP-8048] ~Forms ~WorkflowActions ~Workflows

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.



- [PEP-8038] ~ControlPanel ~UI/UX ~Workflows

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.

• [PEP-8034] ~Emails ~UI/UX ~Workflows

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

v5.18.7 Release

Release Date: 5/14/2024

Bug Fixes

• [PEP-7991] ~Notifications ~Workflows

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] ~Emails ~UI/UX ~Workflows

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.

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Workflows > MyCompany NDA - COPY

Launch Test Export Edit Save

Participant Setup

Reorder	Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
1	Me	Jane Doe	jdoe@mail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	Signer 1	Full Name defined by another	Email Address defined by another	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3	Carbon Copy	Full Name entered at launch...	Email Address entered at launch...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Tasks Editor

Carbon Copy

Enable Doc Forms

New Patient Form 1

Task Placement

Signature

Initials

Approval

DocForms Field Placement

Task List

Enable Sort

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

Carbon Copy 1

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

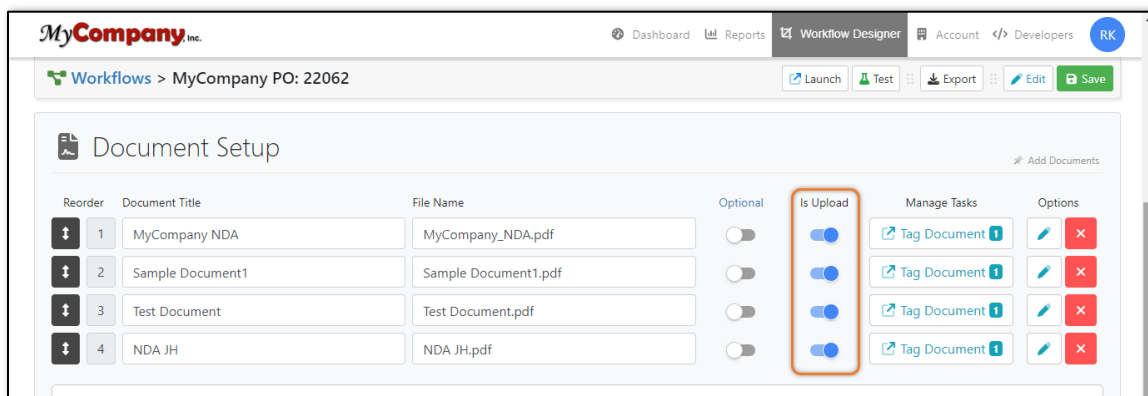
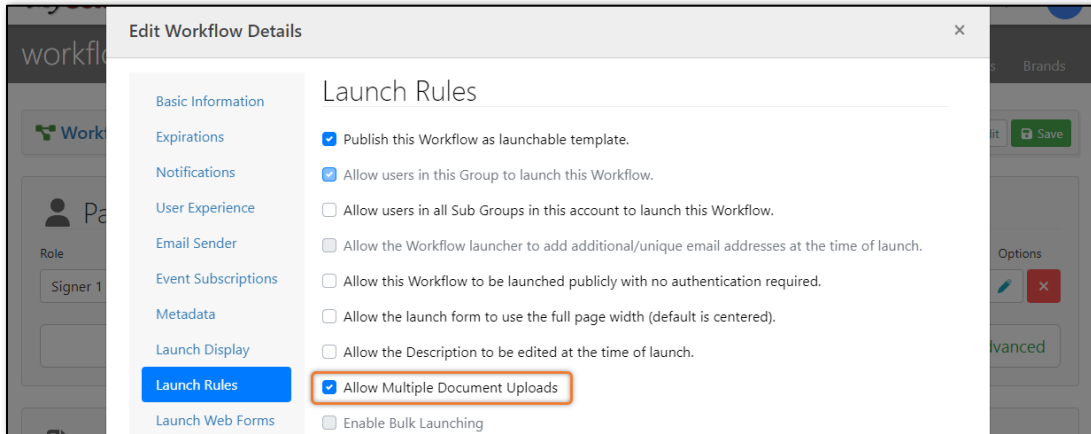
Carbon Copy participant and task should not be in a Completed status until the second participant signs.

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	

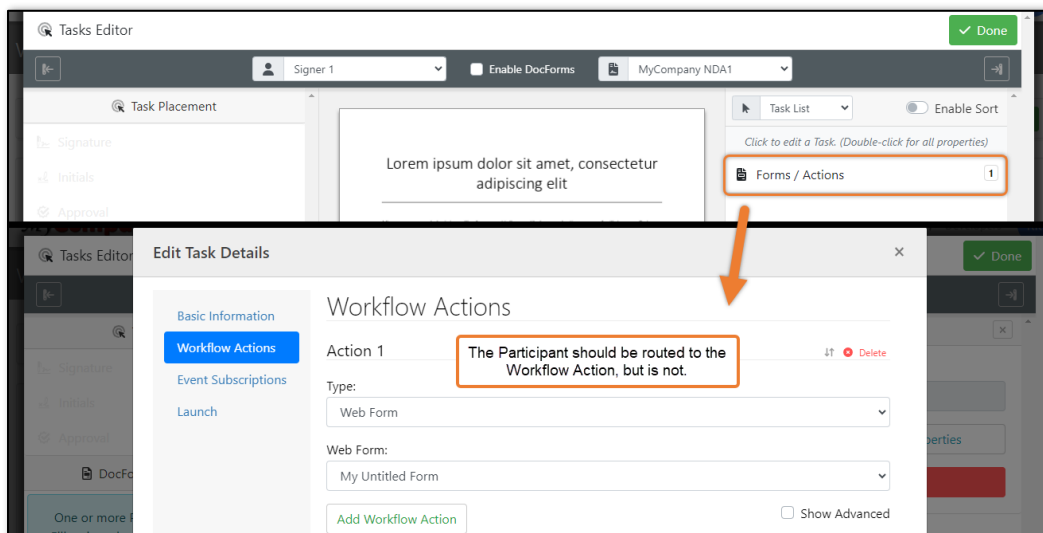
- [PEP-7974] ~Documents ~Workflows

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



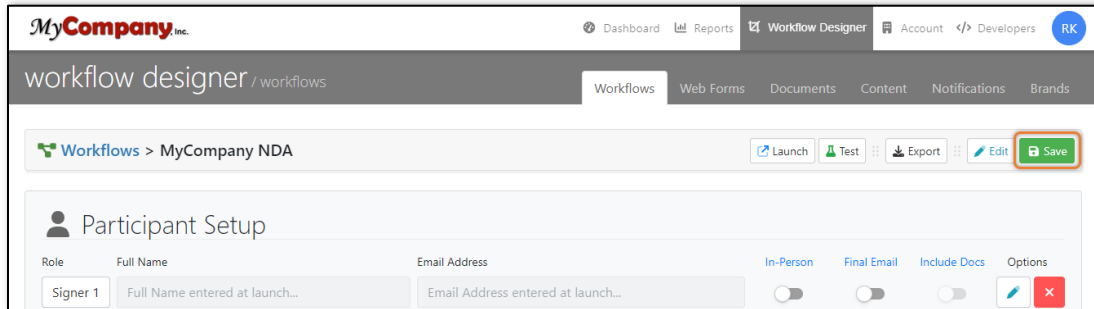
• [PEP-7954] ~WorkflowActions ~Workflows

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.



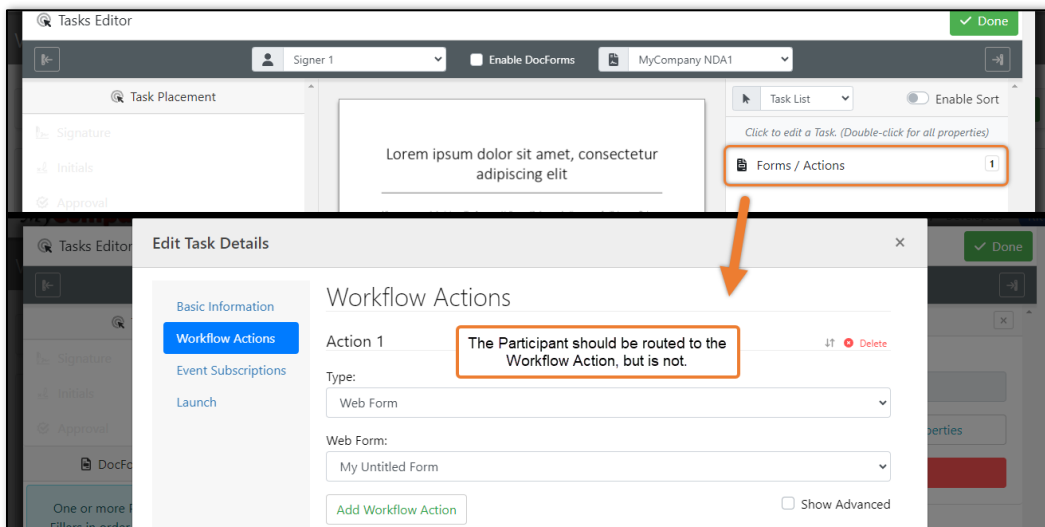
• [PEP-7935] ~UI/UX ~Workflows

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.



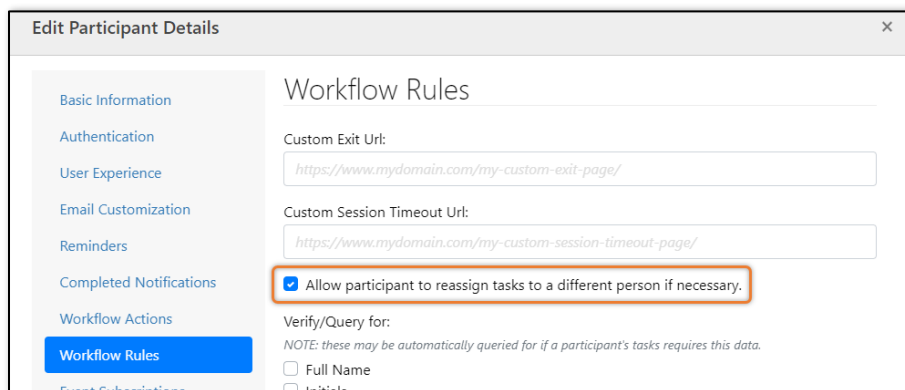
• **[PEP-7910] ~Forms ~Workflows**

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.



• **[PEP-7906] ~Workflows**

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.



Bug Fixes

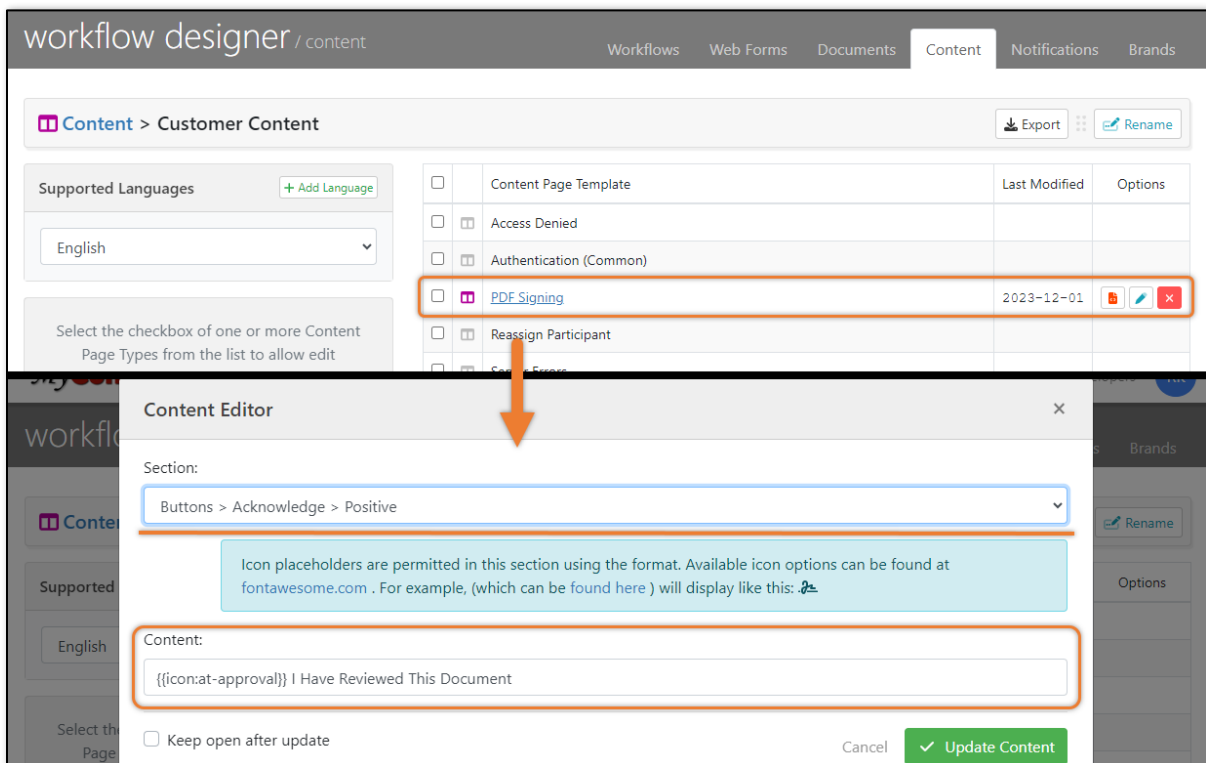
- **[PEP-7943]** ~Emails ~Workflows

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



- **[PEP-7928]** ~ContentSets

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]** ~Notifications ~Workflows

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]** ~Forms

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.

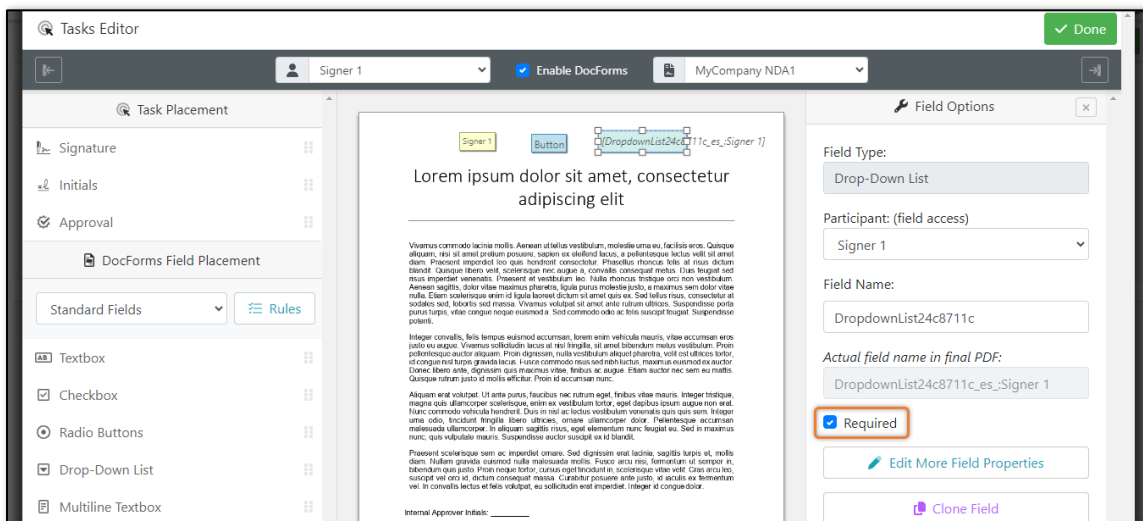
Bug Fixes

- **[PEP-7884]** ~API/WebServices ~Forms

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

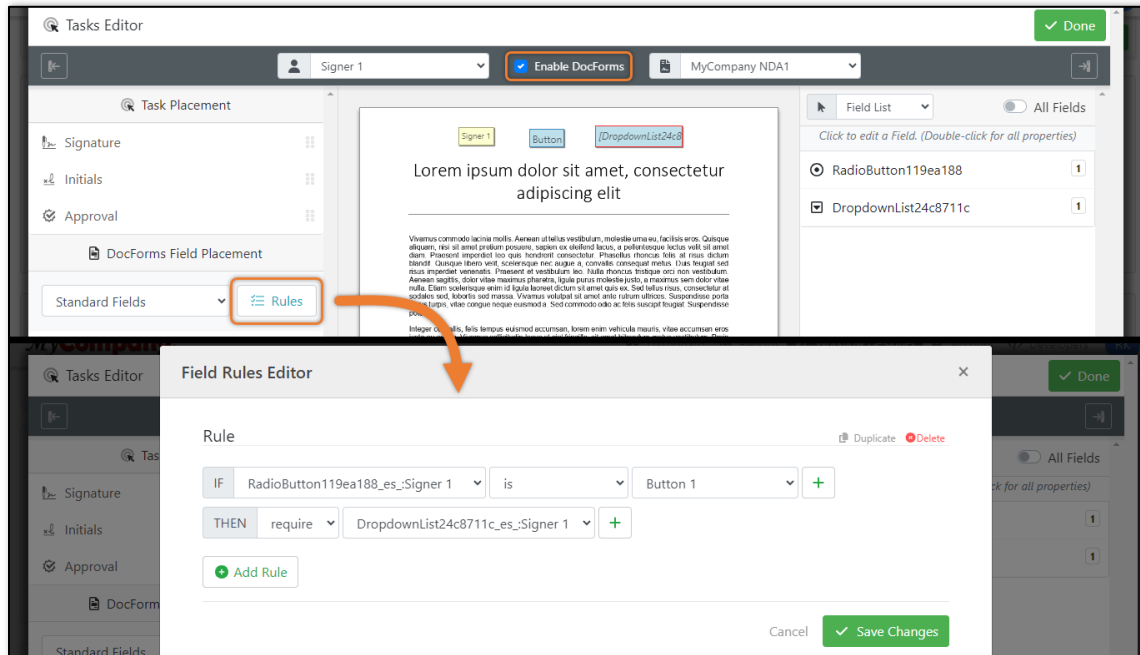
- **[PEP-7854]** ~Forms

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]** ~API/WebServices ~Forms

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] ~Logging

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] ~Signing ~Transactions ~Workflows

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.

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers RK

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Workflows > NDA Export Edit Save

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"/>	
2	Signer 1	Full Name entered at launch...	Email Address entered at launch...	<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 2 Options:

✓ Add Document(s)

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 Done

MyCompany Internal MyCompany NDA

Task Placement

Signature Initials Approval DocForms Field Placement

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

Other Tasks

Forms / Actions Delivery Carbon Copy

Task List Enable Sort

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

Carbon Copy 1

Task for the first Participant

Task for the second Participant

Internal Approver Initials

Signature: Signer 1 [Signature]

Printed Name:

- [PEP-7866] ~Signing ~Transactions ~Workflows

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.

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'. It features two main sections: 'Participant Setup' and 'Document Setup'.

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

Document Setup: This section allows adding documents to the workflow. It includes a table with columns for 'Reorder', 'Document Title', 'File Name', 'Optional', 'Is Upload', 'Manage Tasks', and 'Options'. Two documents are listed: 'MyCompany NDA' (File Name: 'MyCompany_NDA.pdf') and 'NDA Internal Version' (File Name: 'NDA_Internal Version.pdf'). Each document has a 'Tag Document' button and an 'Options' button. At the bottom, there is a '+ Add Document(s)' button.

The screenshot shows the 'Tasks Editor' interface. The top navigation bar includes 'Tasks Editor', 'MyCompany Internal', 'Enable DocForms', and 'MyCompany NDA'. The main content area is titled 'Task Placement' and shows a document with placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit'. The document is divided into sections: 'Signature', 'Initials', 'Approval', 'DocForms Field Placement', and 'Other Tasks'. The 'DocForms Field Placement' section includes a message: 'One or more Participants must be Form Fillers in order to add/edit Form Fields in your document.' and an 'Enable DocForms' button. The 'Other Tasks' section includes a list of tasks: 'Forms / Actions', 'Delivery', and 'Carbon Copy'. The 'Carbon Copy' task is highlighted with an orange box. An orange arrow points from the 'Carbon Copy' task in the list to the 'Carbon Copy' task in the document.

- **[PEP-7856]** ~API/WebServices ~Signatures ~Signing

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

- **[PEP-7838]** ~Infrastructure

Fixed issue where license information was not being decrypted properly.

- **[PEP-7818]** ~ControlPanel ~UI/UX ~Workflows

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.

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

dashboard / workflow templates | Quick Stats | Workflow Templates | Pending Signatures

Workflow Templates > Launch | Test | Edit

MyCompany NDA - COPY

Signer 2

Full Name:

Email Address:

[Start Workflow ->](#)

v5.18.2 Release

Release Date: 3/14/2024

Bug Fixes

- [PEP-7791] ~Access/Permissions ~ControlPanel ~Users

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.

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

account / permission sets | Groups | Users | Permission Sets | Integrations | Security

Type to filter Permission Sets... | + Add Permission Set

ID	Name	System-Wide	Account-Wide	Sub Group Shared	Permissions Grid	Options
1	Administrator	✓	✓	✓	[Grid of permissions]	[Edit] [Delete]
2	Manager	✓	✓	✓	[Grid of permissions]	[Edit] [Delete]
3	User	✓	✓	✓	[Grid of permissions]	[Edit] [Delete]

- [PEP-7785] ~ControlPanel ~Workflows

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.

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

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="checkbox"/> <input type="checkbox"/>
2	Sample Document1	Sample Document1.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="checkbox"/> <input type="checkbox"/>
3	Test Document	Test Document.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="checkbox"/> <input type="checkbox"/>
4	NDA JH	NDA JH.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="checkbox"/> <input type="checkbox"/>

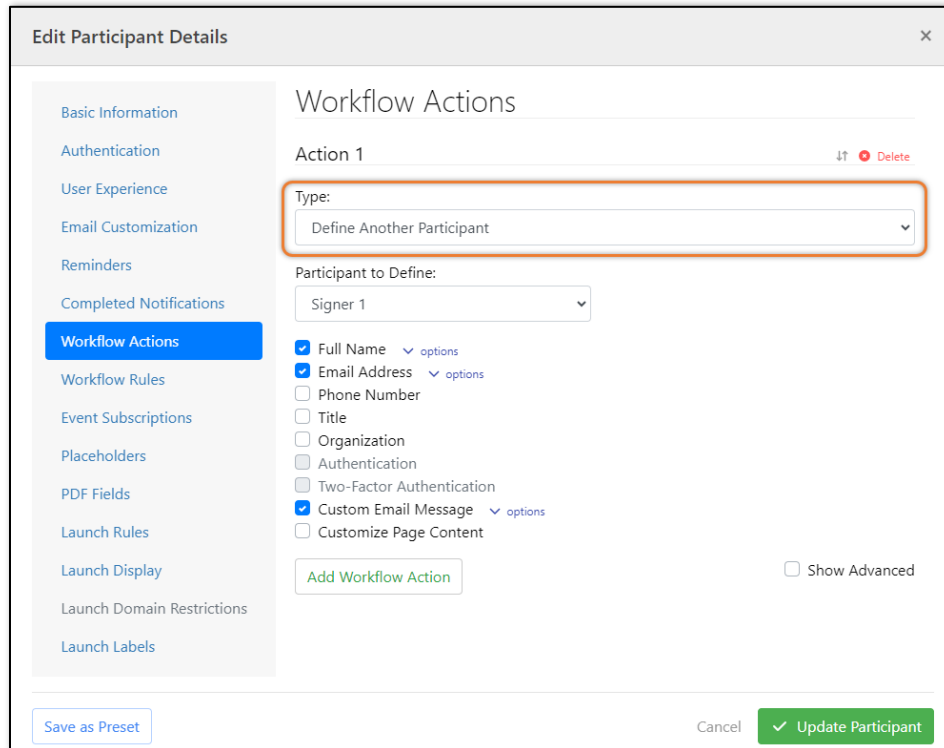
Add Document(s)

v5.18.1 Release Bug Fixes

Release Date: 3/7/2024

- [PEP-7755] ~UI/UX ~WorkflowActions ~Workflows

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.



Edit Participant Details

Workflow Actions

Action 1 ⬆ ⬆ Delete

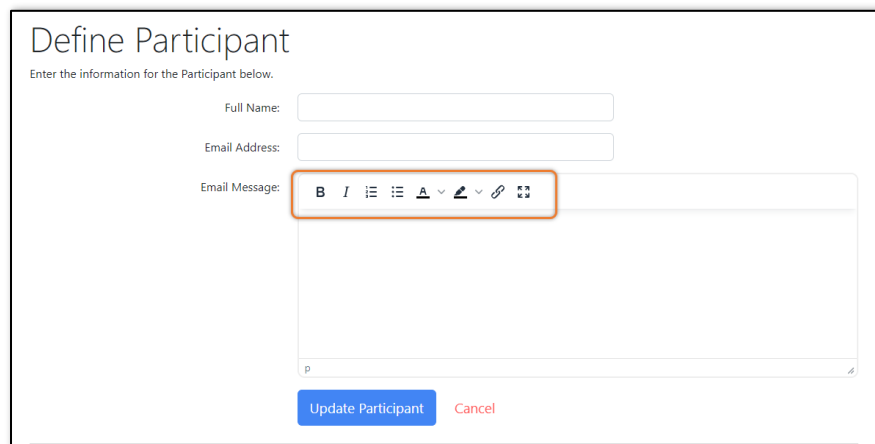
Type: Define Another Participant

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



Define Participant

Enter the information for the Participant below.

Full Name:

Email Address:

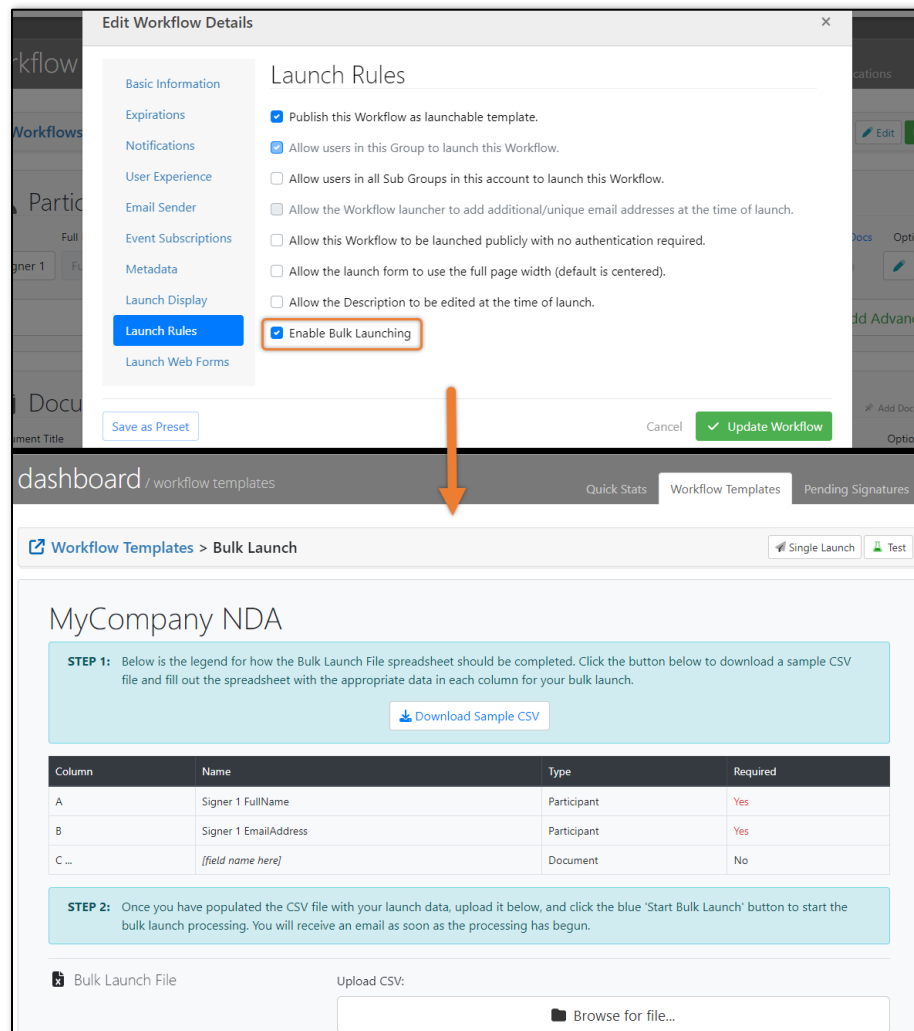
Email Message:

B I [] A [] [] []

Update Participant Cancel

• **[PEP-7724] ~Workflows**

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.

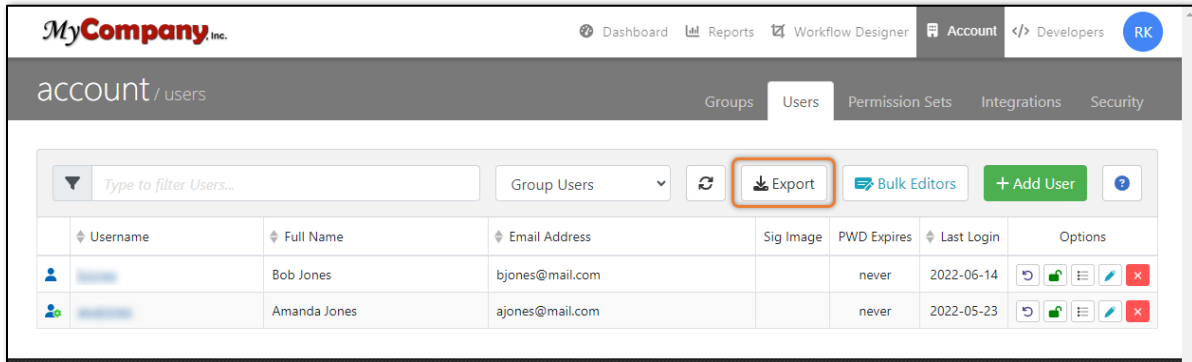


- [PEP-7718] ~Documents ~Signing

Fixed issue where a query for the Document Review page was running slowly. Updated a query to be more performant.

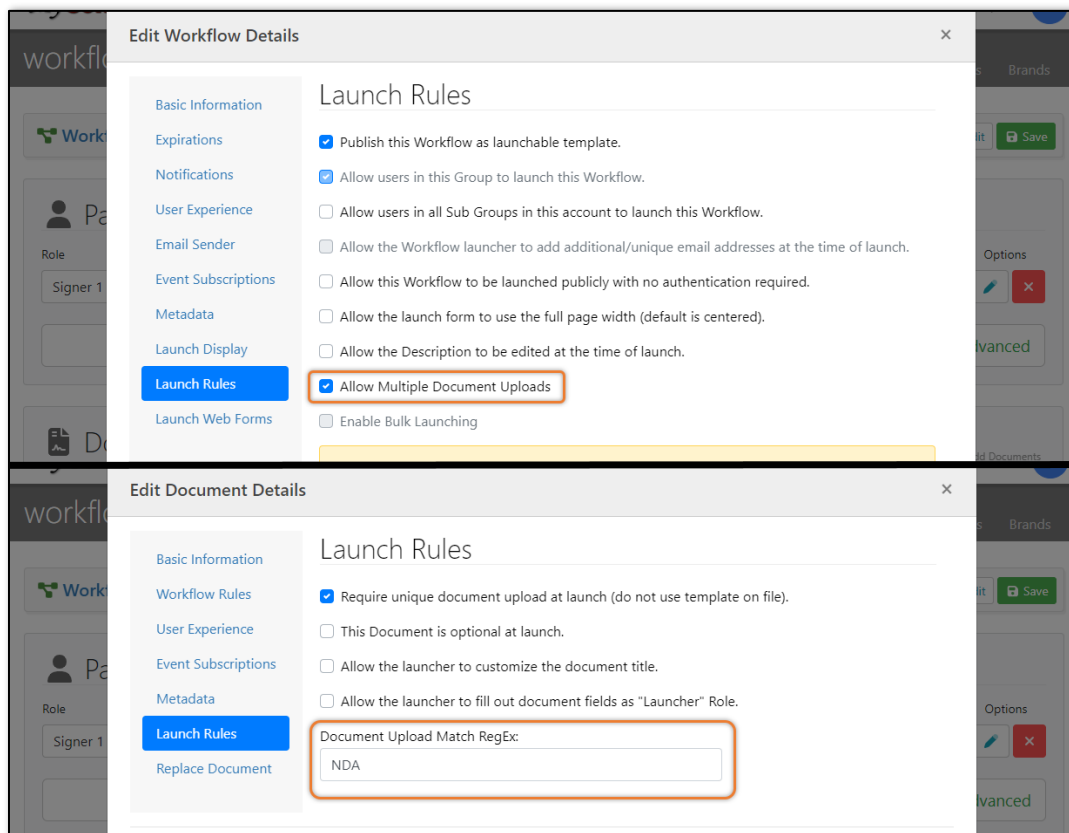
- [PEP-7691] ~ControlPanel ~Users

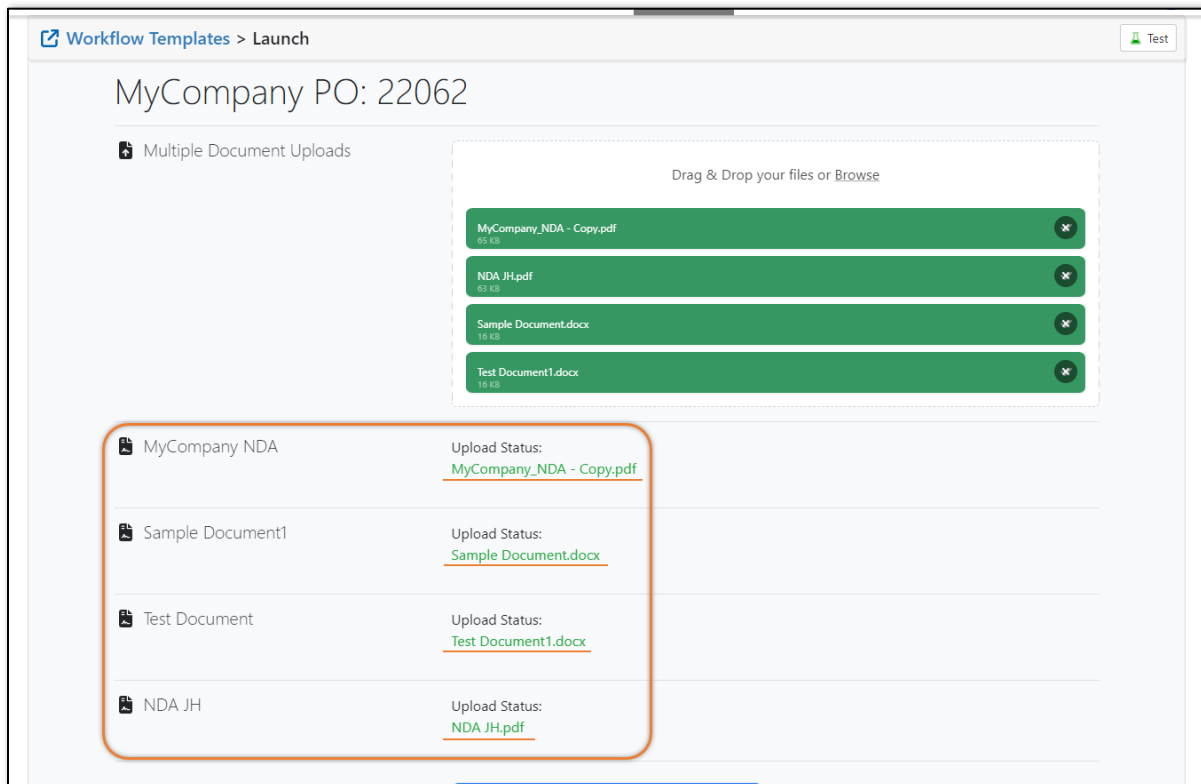
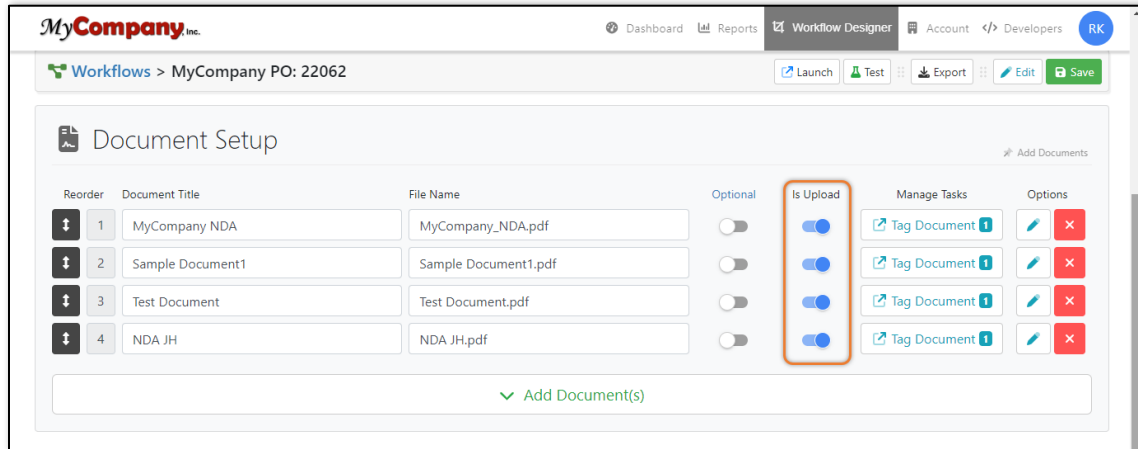
Fixed issue where CSV exports would not be properly formatted due to commas. All strings are now wrapped in double quotes to ensure properly CSV exports. Please see the image below for an example of a CSV export.



• **[PEP-7683]** ~ControlPanel ~Documents

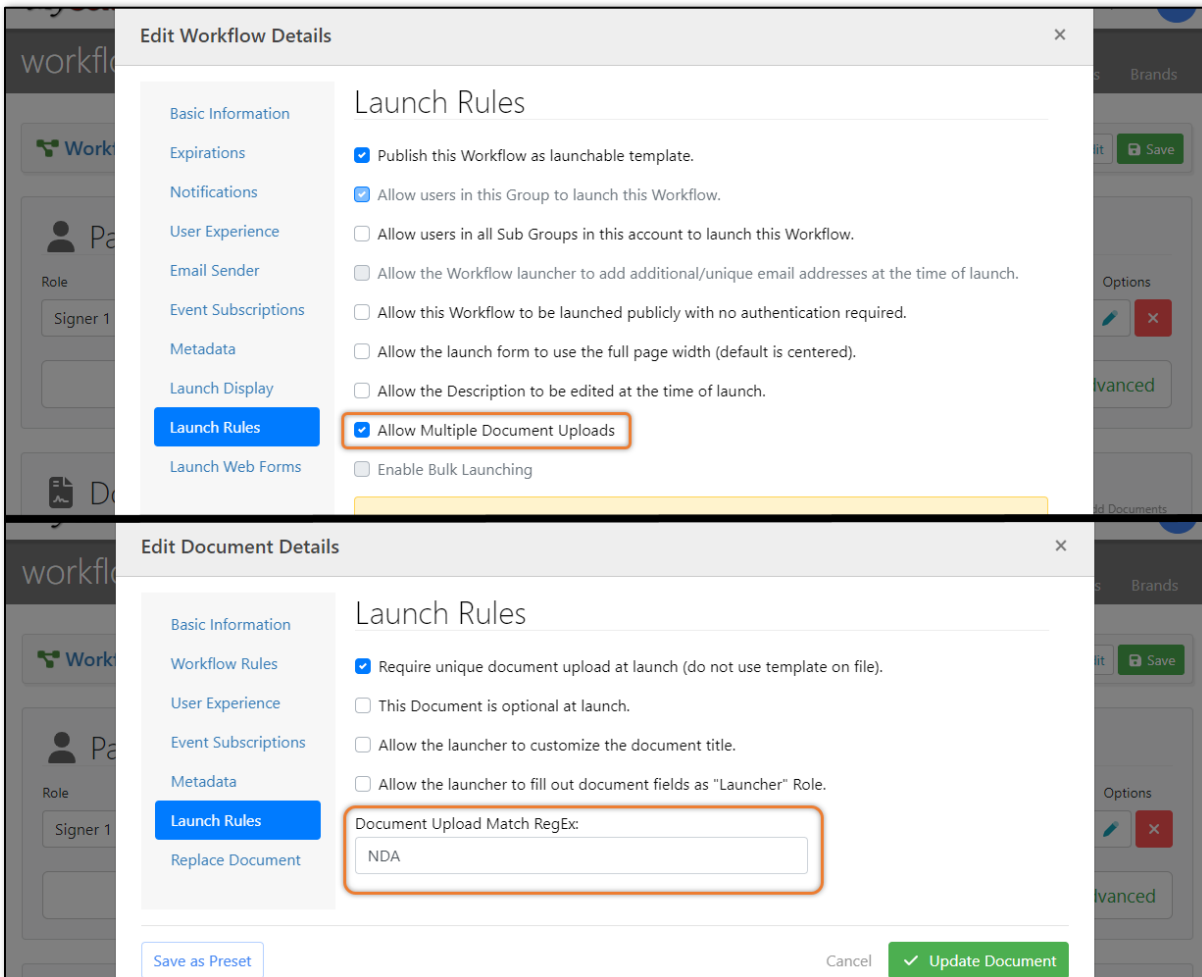
Fixed issue where the Control Panel would not show which uploaded file was matched to a particular document when utilizing the Multiple Document Uploads functionality. Update the control panel UI to reflect which document is being used when uploading a document on the launch screen. Please see the images below for the referenced settings and an example of uploaded files being matched to documents on the launch screen.





• [PEP-7682] ~UI/UX ~Workflows

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.



- **[PEP-7678] ~Authentication**

Fixed issue where SSO logins may fail due to duplicate keys in JWT.

- **[PEP-7677] ~ControlPanel ~Documents**

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.

Edit Workflow Details

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

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:

Save as Preset Cancel Update Document

MyCompany Inc. Dashboard Reports Workflow Designer Account Developers RK

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Workflows > MyCompany PO: Documents uploaded must match the File Name. Example: 'MyCompany_NDA.pdf' would match with 'mycompany_nda'.

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="text"/>
2	Sample Document1	Sample Document1.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tag Document 1	<input type="text"/> <input type="text"/>

Add Document(s)

• [PEP-7675] ~Signatures ~Workflows

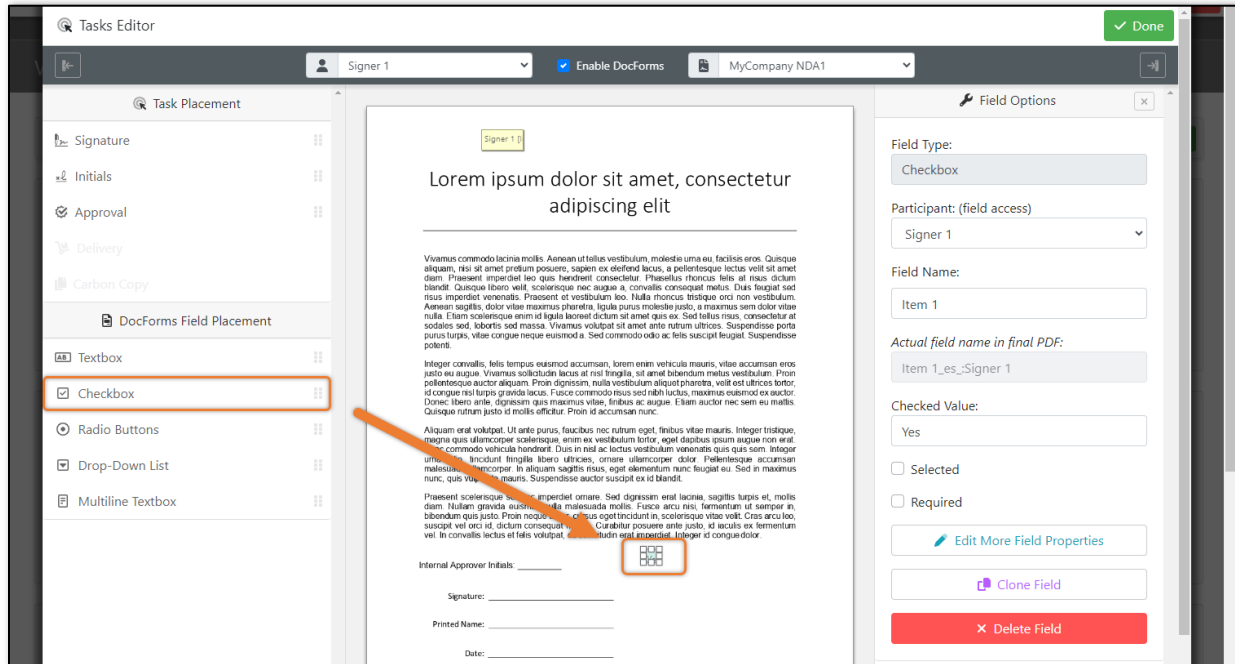
Fixed issue where a typo was seen in Signature Block Data. Please see the image below referencing the fixed typo.

The screenshot shows a document form with a signature block configuration panel on the right. The form contains placeholder text and a signature block with fields for Internal Approver Initials, Signature, Printed Name, and Date. The configuration panel on the right is titled "Sig Block Data Options" and includes settings for Data Type (Signature Date), Font (Helvetica), Color (Blue), Date Format (12/1/2020), and checkboxes for "Use International Date Format", "Include Time" (checked), "Use 24 Hour Time Format", and "Include Time Zone" (highlighted with a red box). Buttons for "Edit More Data Item Properties", "Clone Data Item", and "Delete Data Item" are also present.

• **[PEP-7669] ~Documents**

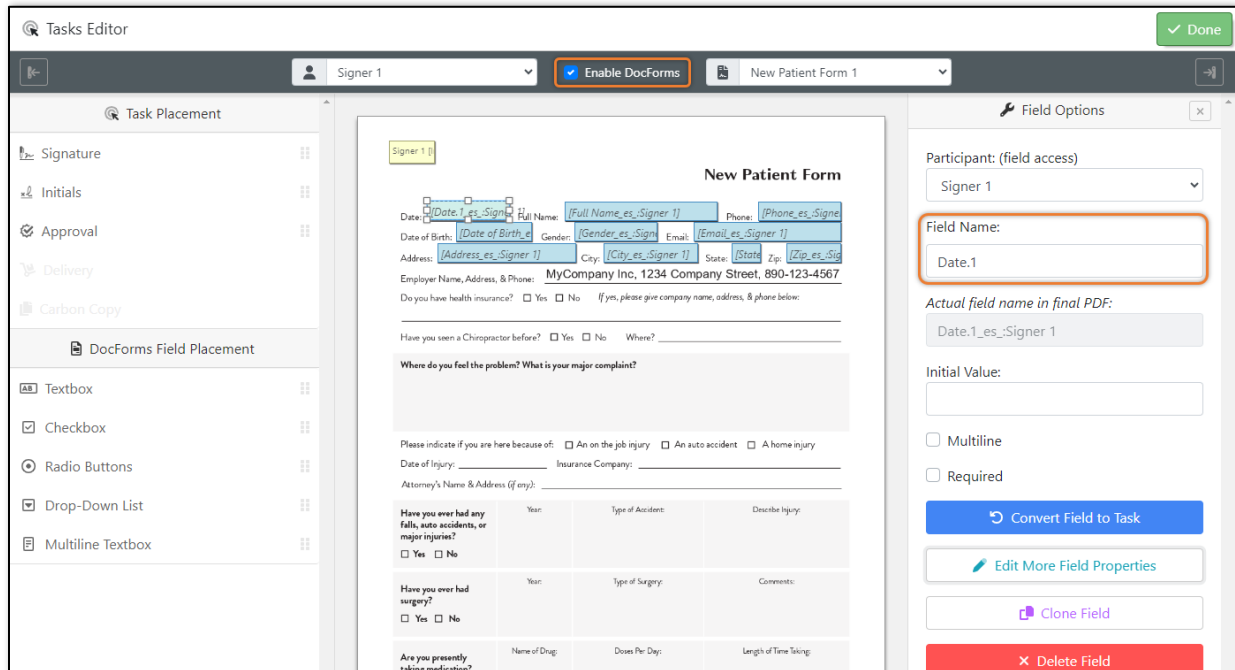
Fixed issue where certain scenarios may cause checkboxes to not properly uncheck when Participants revisit Web Forms and DocForms to update their selection before completing their assigned document tasks. Please see the images below for the referenced settings.

The screenshot shows the "workflow designer / web forms" interface. On the left, a sidebar lists "Add Fields" with options: Standard Fields, Textbox, Multiline Textbox, Checkboxes (highlighted with a red box), Dropdown List, and Radio Buttons. An orange arrow points from the "Checkboxes" field to a preview of an "Untitled Form". The preview shows a form with a title "Untitled Form", a subtitle "This is my form. Please fill it out.", and a section titled "Untitled Check List:" with a checkbox labeled "Item 1". Buttons for "Save and Continue" and "Exit" are visible at the bottom of the preview.



• [PEP-7666] ~Documents ~Forms

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.

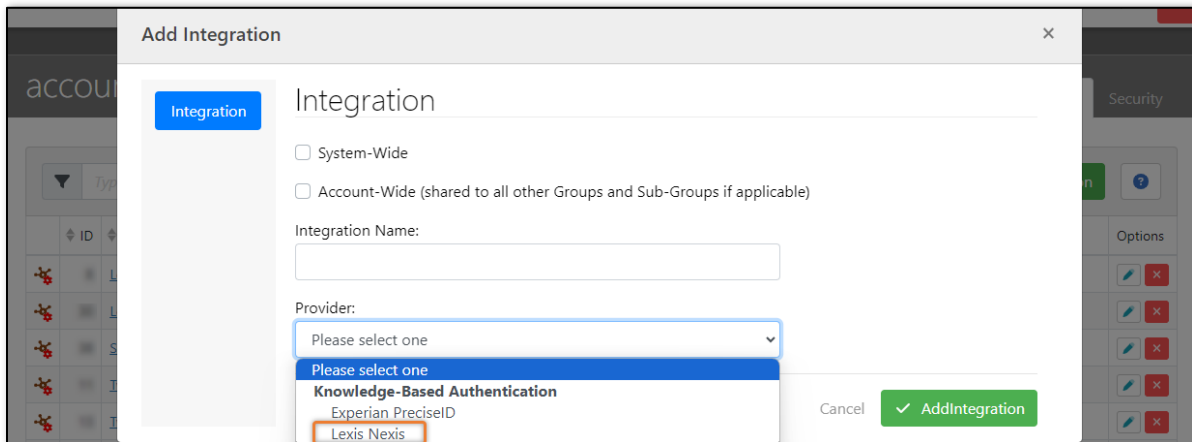


• [PEP-7648] ~Documents

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.

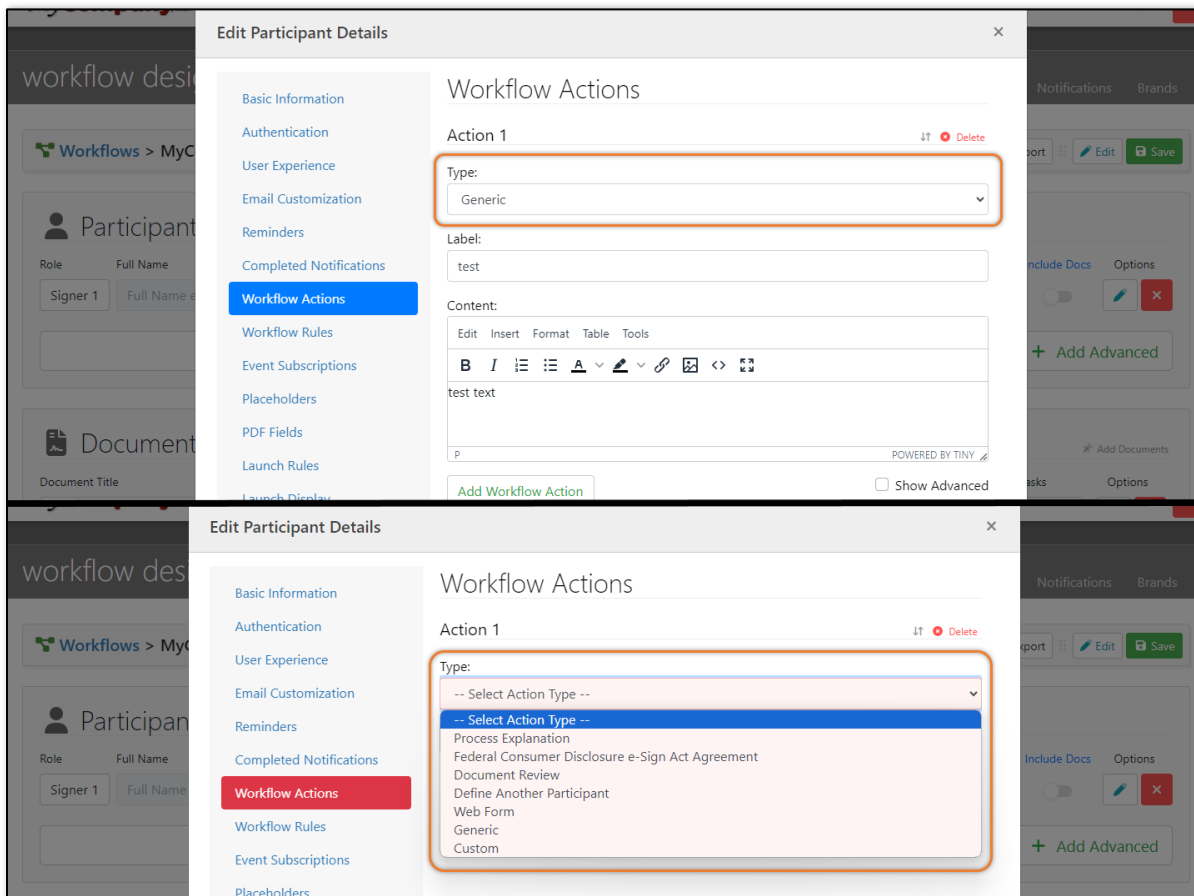
• [PEP-7642] ~Authentication ~Integrations

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.



• [PEP-7641] ~UI/UX ~WorkflowActions ~Workflows

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] ~Authentication ~Signatures ~Signing

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.

The screenshot shows the 'Edit Group' dialog box with the 'Signature Chrome' tab selected. The 'Disable' checkbox is checked. The 'Header' and 'Footer' fields are empty, with placeholder text 'Not required' and '(leave blank for default)'. An 'Example' section displays a signature 'Jim Halpert' with the ID '1000548013-1001331918'.

• [PEP-7620] ~ControlPanel ~Users

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.

The screenshot shows the 'account / users' page with the 'Users' tab selected. The 'Bulk Editors' section is active, showing the 'Upload' tab. A message explains the CSV upload process. Below is a form with a dropdown set to 'Insert Users', a 'Select file to upload...' button, a checked 'Update existing users' checkbox, and a green 'Upload Users' button.

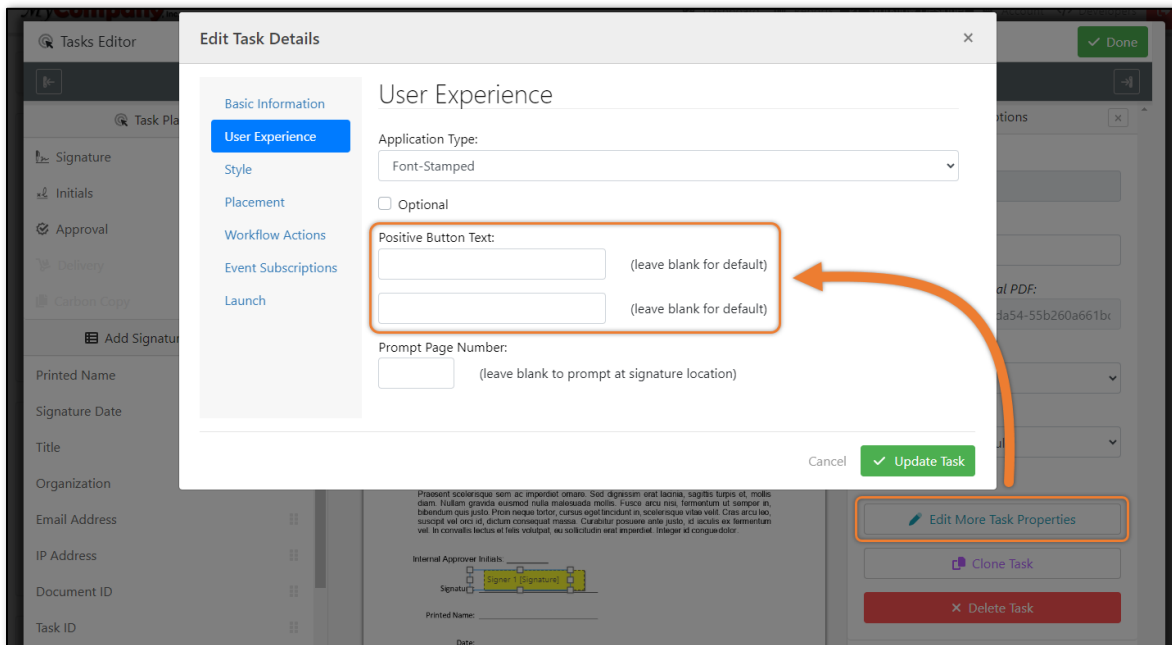
• [PEP-7605] ~Emails ~Transactions

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.



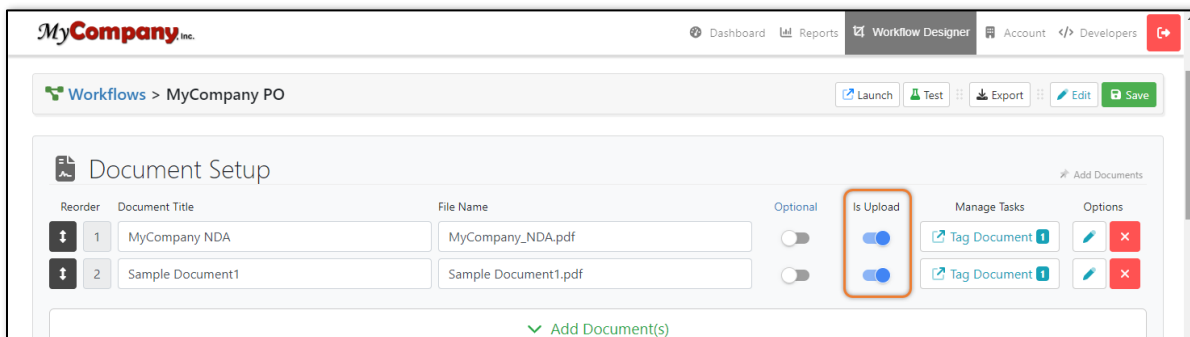
• [PEP-7603] ~UI/UX ~Workflows

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.



• [PEP-7590] ~Documents ~Workflows

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.



Edit Document Details

Basic Information

Title: MyCompany NDA

File Name: MyCompany_NDA.pdf

File PDF File Name: Filename

☒ Override file name with uploaded file name at launch.

Save as Preset Cancel Update Document

- **[PEP-7588] ~Infrastructure ~Installer**

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

- **[PEP-7585] ~Workflows**

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.

Edit Workflow Details

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.

☐ Enable Bulk Launching

Edit Workflow Details

Basic Information

Workflow ID: [Auto-generated ID]

Label: MyCompany PO: 59387

Description: leave blank to use the above Label as the Description
MyCompany PO: 59387

☒ Keep this Workflow Private (only you can see or edit)

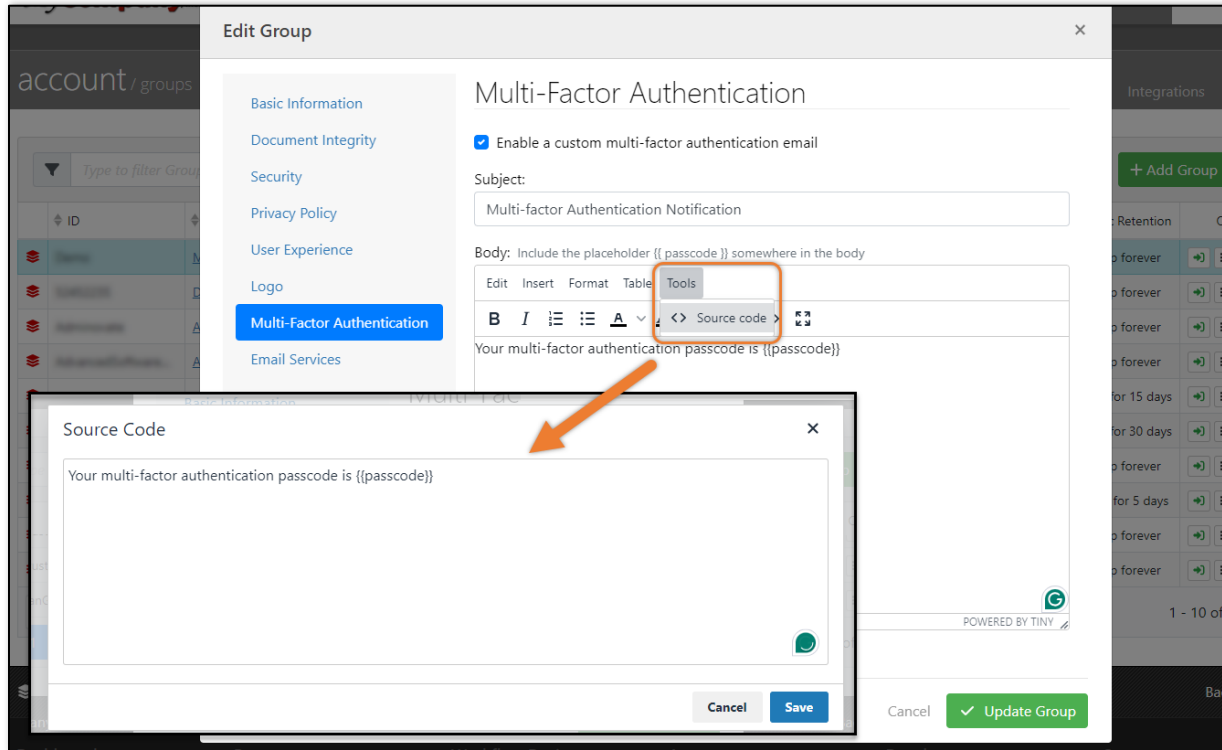
- **[PEP-7568]** ~ControlPanel ~Documents ~Workflows

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

Task	Page Number
Delivery	1
Carbon Copy	1

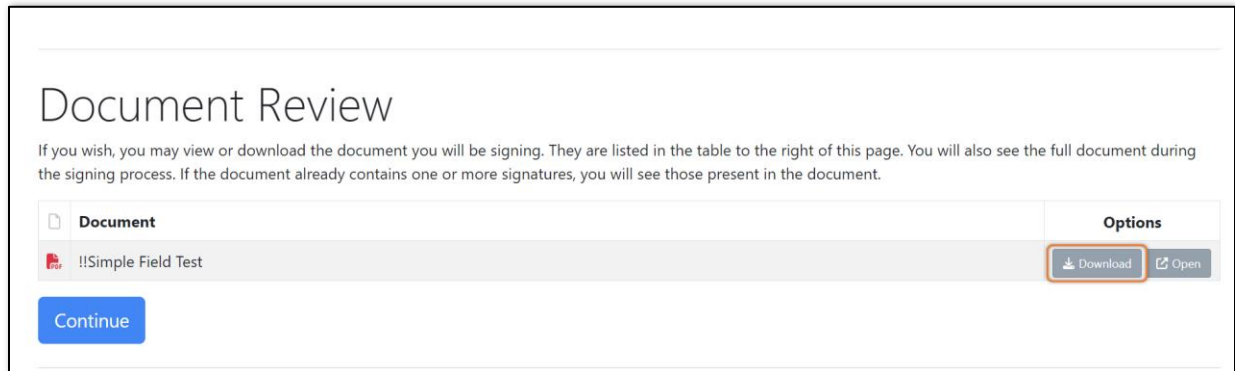
- **[PEP-7565]** ~ControlPanel ~Groups

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.



• **[PEP-7512]** ~UI/UX ~WorkflowActions

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



• **[PEP-7428]** ~API/WebServices ~Signing ~UI/UX ~Workflows

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.

Tasks Editor

Signer 2 Enable DocForms MyCompany NDA

Task Placement

Signature Initials Approval Delivery Carbon Copy

Task List

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

Carbon Copy 1

Lorem ipsum dolor sit amet, consectetur adipiscing elit

Vivamus commodo lacina mollis. Aenean ut tellus vestibulum, molestie urna eu, facilisis eros. Quisque aliquam, risus at amet gravida posuere, sapien ex eleifend lectus, a pretiumque lectus velit at amet. Quisque imperdiet leo quis hendrerit consectetur. Phasellus morbi nulla, at risus dictum blandit. Quisque diam velit, scelerisque nec, dignum a, conestit, conestit mollis. Duis ligula vel, nunc imperdiet venenatis. Praesent et vestibulum leo. Nulla rhoncus luctus nisi non vestibulum. Aenean sagittis, dolor vitae maecenas pharetra, ligula porta molestie justo, a maecenas sem dolor, vel nulla. Etiam scelerisque enim ut ligula bonnet dictum sit amet quis ex. Sed tellus nunc, consectetur at euismod sed, libero vel massa. Vivamus vestibulum sit amet ante nunc efficitur. Suspendisse porta purus turpis, vitae congue neque euismod a. Sed commodo odio ac felis suscipit feugiat. Suspendisse potenti.

Integer convallis. Nunc tempus maecenas accumsan. Nam enim vehicula mauris, vitae accumsan enim, posui eu augue. Vivamus sollicitudin lacus et nisi fringilla, ut amet bibendum mollis vestibulum. Proin pellentesque tunc aliquam. Proin dignissim, nulla vestibulum aliquam pharetra, vel sit ultricies turpis, et congue nisl turpis gravida lacus. Fracce commodo nunc sed nisl turpis, maximus euismod ex auctor. Donec. Donec porta, dignissim quis mauris, vitae, felis, ac, augue. Etiam auctor nec sem eu mollis. Quisque ultram posui et mollis efficitur. Proin et accumsan nunc.

workflow designer

Workflows Web Forms Documents Content Notifications Brands

Workflows > MyCompany PO

Launch Test Export Edit Save

Participant Setup

Reorder	Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
1	Signer 1	Full Name entered	Email Address entered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/>
1	Signer 2	Full Name entered	Email Address entered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/>
3	Signer 3	Full Name entered	Email Address entered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="text"/>

reports

Transaction Documents Participants Emails Audit Report Event History

Search Results > Transaction Details: Participants

MyCompany PO

The Participant order should match and be 1, 1, 3.

Cancel Transaction

Participant ID	Full Name	Email Address	Phone Number	Status	Options
1	Jane Doe	jdoe@mail.com		Sent	<input type="text"/> <input type="text"/>
1	John Smith	jsmith@mail.com		Sent	<input type="text"/> <input type="text"/>
1	Bob Jones	bjones@mail.com		Completed	

- [PEP-7390] ~Signatures ~WorkflowActions ~Workflows

Fixed issue where a Participant could enter only a space character for the Full Name on the Define Participant workflow action. The validation for Full Name on the Define Participant Workflow Action will no longer accept only a space character. Please see the image below for the referenced settings.

Edit Participant Details

Workflow Actions

Action 1 [Delete]

Type: Define Another Participant

Participant to Define: Signer 2

☒ Full Name ^{options}

Custom Field Label: You can customize this field's label for the Defining Participant.

☒ Required
☐ Prepopulate
☐ Read-Only

☒ Email Address ^{options}
☐ Phone Number
☐ Title
☐ Organization

• **[PEP-7275] ~Signatures ~Workflows**

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.

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Workflows > MyCompany NDA [Launch] [Test] [Export] [Edit] [Save]

Document Setup [Add Documents]

Document Title: New Patient Form 1 File Name: New_Patient_Form_1.pdf Is Upload: [On] Manage Tasks: [Tag Document] Options: [Edit] [Delete]

✓ Add Document(s)

Tasks Editor [Done]

All Participants [New Patient Form 1]

Tasks

Label	Task Type	Placeholder Type	Placeholder/Position	Participant	Options
Sig 1	Initials	Search Text	sig	Signer	[Manage Data] [Edit] [Delete]

Signature Block Data

Data Type	Placeholder Type	Placeholder/Position	Options
Signature Date	Search Text	date	[Edit] [Delete]

+ Add Signature Block Data

Edit Signature Block Data Details

Basic Information

Style

Placement

Placement Type: Text Placeholder

Placeholder Text: date

Page(s) to Search: All Pages

Instance: 1

Offset Start Position: Left

Horizontal Offset:

Vertical Offset:

☐ Do not prevent Transaction from creating if placement isn't found

Cancel **Update Data**

- **[PEP-6292]** ~Users ~Workflows

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.

workflow designer / workflows

Workflows Web Forms Documents Content Notifications Brands

Workflows > MyCompany NDA Launch Test Export Edit Save

Document Setup Add Documents

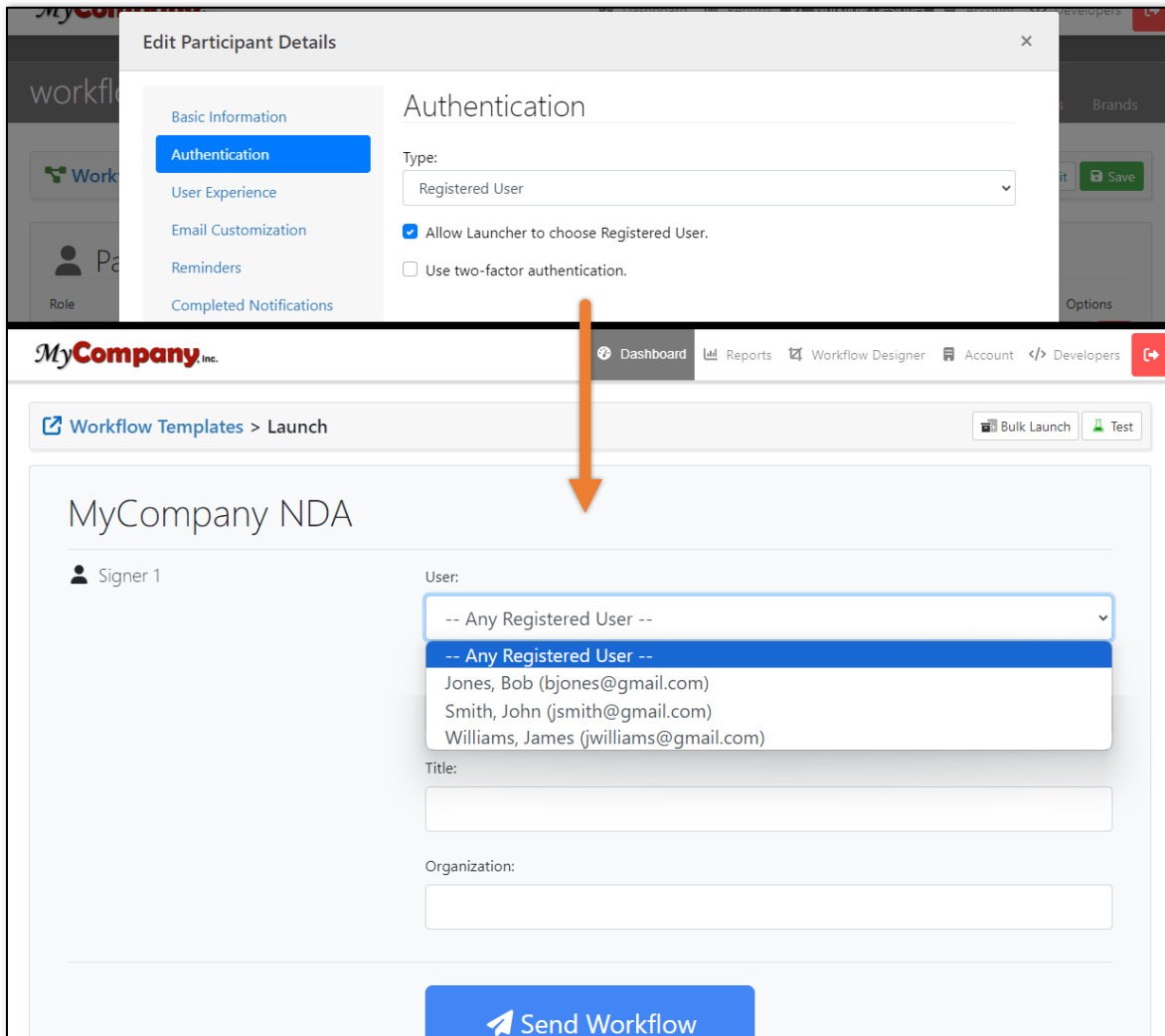
Document Title: New Patient Form 1

File Name: New_Patient_Form_1.pdf

Is Upload Manage Tasks Options

Tag Document

Add Document(s)



v5.18.0 Release

Release Date: 3/7/2024

New Features

- [PEP-7485] ~ControlPanel ~UI/UX ~Workflows

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.

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"/>	<input type="text"/> <input type="button" value="X"/>

+ 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"/>	<input type="button" value="Tag Document"/> 1	<input type="text"/> <input type="button" value="X"/>
2	Sample Document	Sample Document.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Tag Document"/> 1	<input type="text"/> <input type="button" value="X"/>
3	Blank Template	Blank Template	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Tag Document"/> 1	<input type="text"/> <input type="button" value="X"/>

+ Add Document(s)

Workflow Templates > Launch Test Edit

Privacy Policy

- 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
- 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
 Sample Document.pdf 30 KB
- 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] ~API/WebServices ~Signing

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

- 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

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:

[illegible]

- 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.

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

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, JH.pdf

MyCompany NDA

Upload Status:

Completed

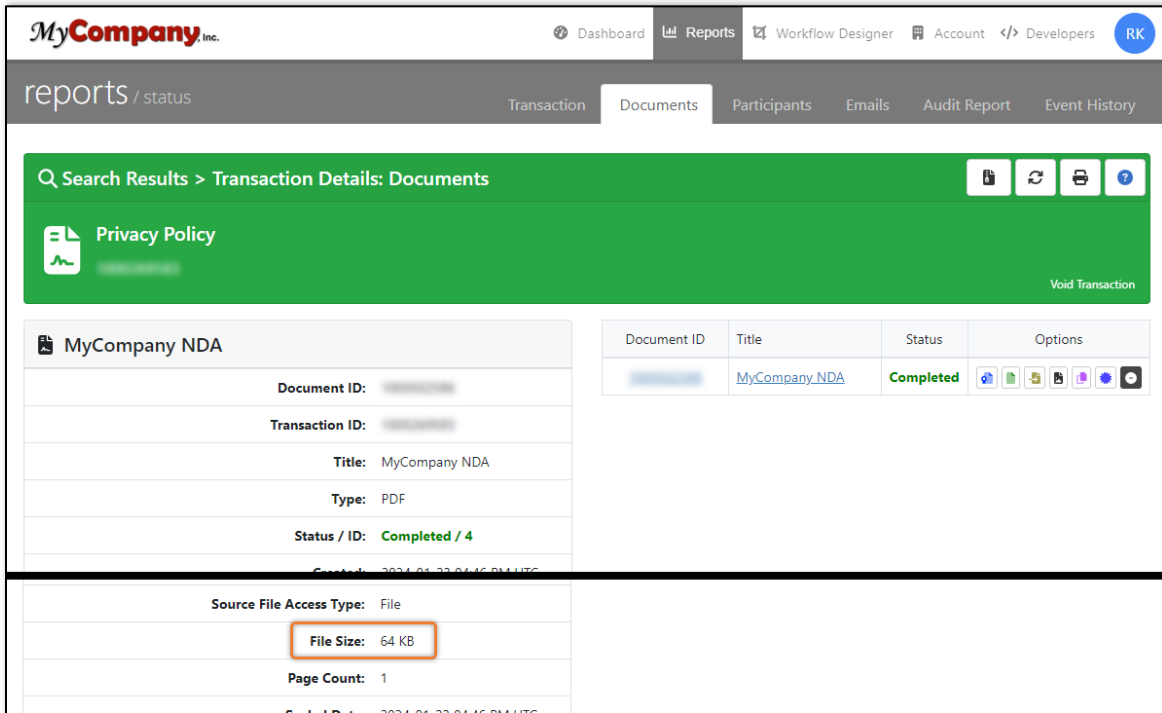
Start Workflow →

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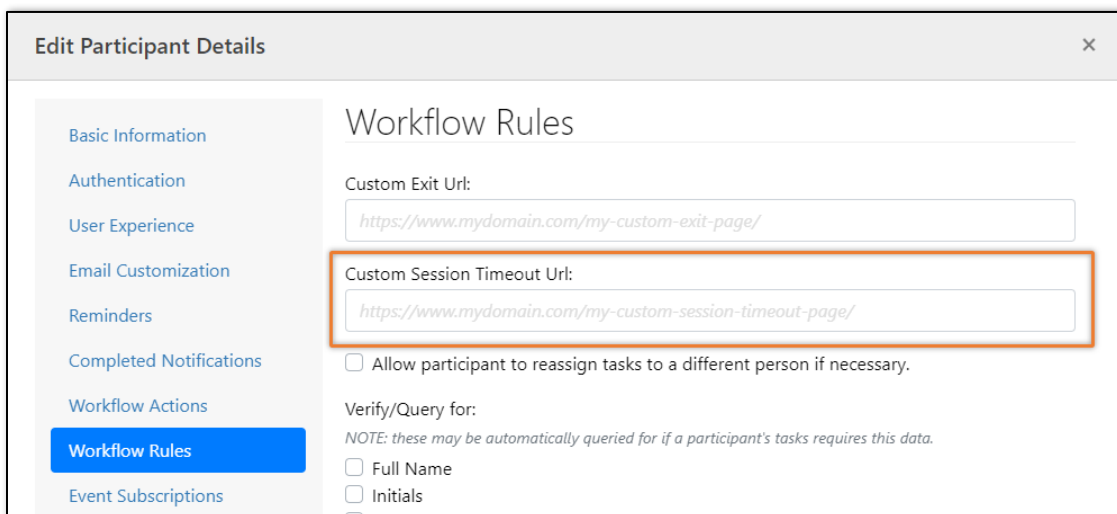
• [PEP-7382] ~Documents ~Logging

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] ~Signing

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] ~Access/Permissions ~Reports ~Users

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.

Add Permission Set

Permission Set

Name:

☐ System-Wide

☐ Account-Wide

☐ Share to all Sub-Groups (if applicable)

Allow Access to:

☒ 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:

Last Name:

Email Address:

☒ System-Wide Admin

☐ Account-Wide Admin

☒ Allow Installation Tests Access

☒ Deny document download access without explicit permissions

Cancel

- [PEP-7190] ~Integrations ~Logging

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/>

Add Integration

Integration

Provider:

New Relic Browser

Please select one

Logging, Monitoring, and Analytics

Google Tag

LogRocket

New Relic Browser

Integration

Provider:

New Relic Browser

☒ Active in Control Panel

☐ Active in Signing UI

Account ID:

Application ID:

License Key:

Cancel **Add Integration**

- [PEP-7050] ~API/WebServices ~ControlPanel ~Reports ~Signatures

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.

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:

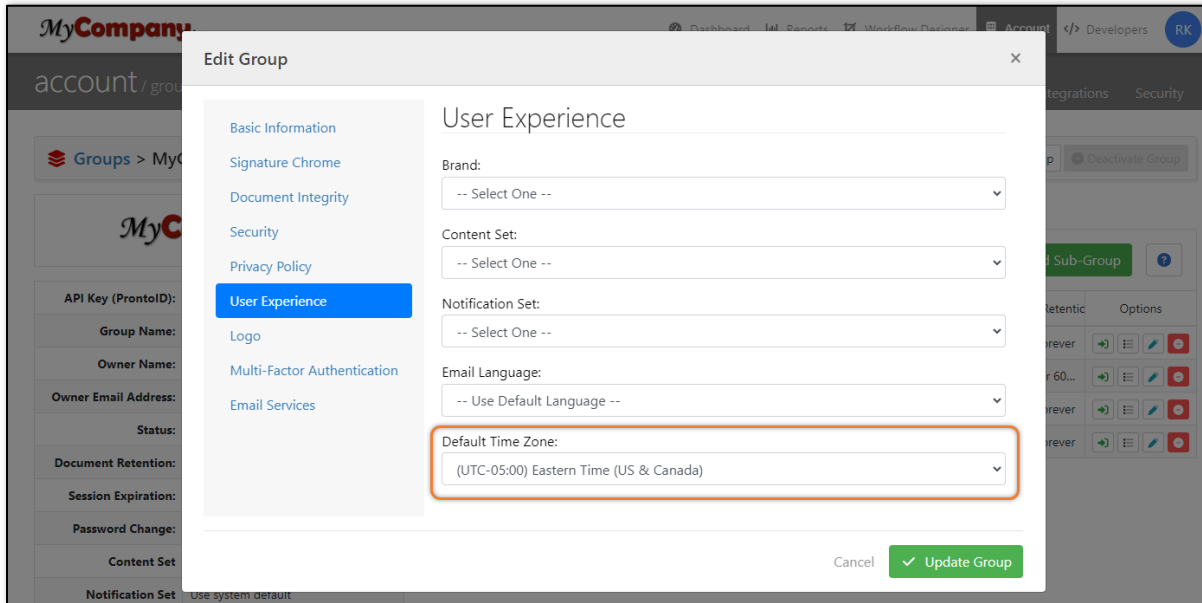
-- Use Default Group Time Zone --

☐ Prompt Participants for Cancellation Reason

Save as Preset

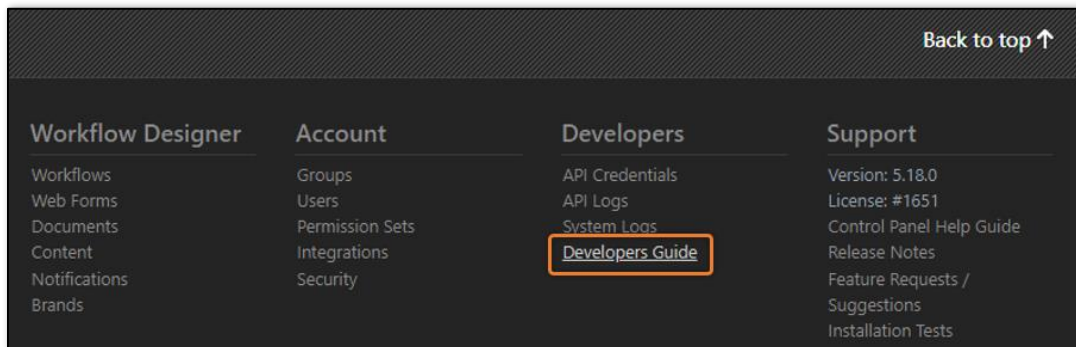
Cancel

Update Workflow



- [PEP-6939] ~ControlPanel

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.



- [PEP-6708] ~Infrastructure ~Integrations

Added the ability to utilize 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-6570] ~ControlPanel ~Forms ~UI/UX

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 shows the 'MyCompany Inc.' Workflow Designer interface. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The 'Workflow Designer' section is active, showing 'Web Forms' and 'My Untitled Form'. The 'Add Fields' panel on the left lists various field types, with 'Read-Only' highlighted. The main canvas displays a 'Web Form' with a 'Read-Only' field and a 'Save and Continue' button.

- [PEP-6262] ~API/WebServices ~ControlPanel ~Documents ~Forms ~UI/UX

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.

The screenshot shows the 'Tasks Editor' interface for 'Jane Doe' with 'Enable DocForms' checked. The 'New Patient Form' is displayed with various fields. A 'Field Rules Editor' overlay is shown, allowing the user to define rules for the form fields. The 'Field Rules Editor' includes a 'Rule' section with 'IF' and 'THEN' conditions, and a 'Save Changes' button.

- [PEP-6150] ~ControlPanel ~Reports ~Signing ~Workflows

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.

Participant ID	Full Name	Email Address	Phone Number	Status	Options
1000182890	Jane Doe	jdoe@mail.com		Sent	

Resend Participant Notice?

Are you sure you wish to resend this participant notice to **Jane Doe** at **jdoe@mail.com**?

☒ Refresh Participant Access Link (recommended if email/phone has been changed)

Cancel Resend Notice

Improvements

- [PEP-7600] ~Documents ~Emails ~Infrastructure ~Transactions

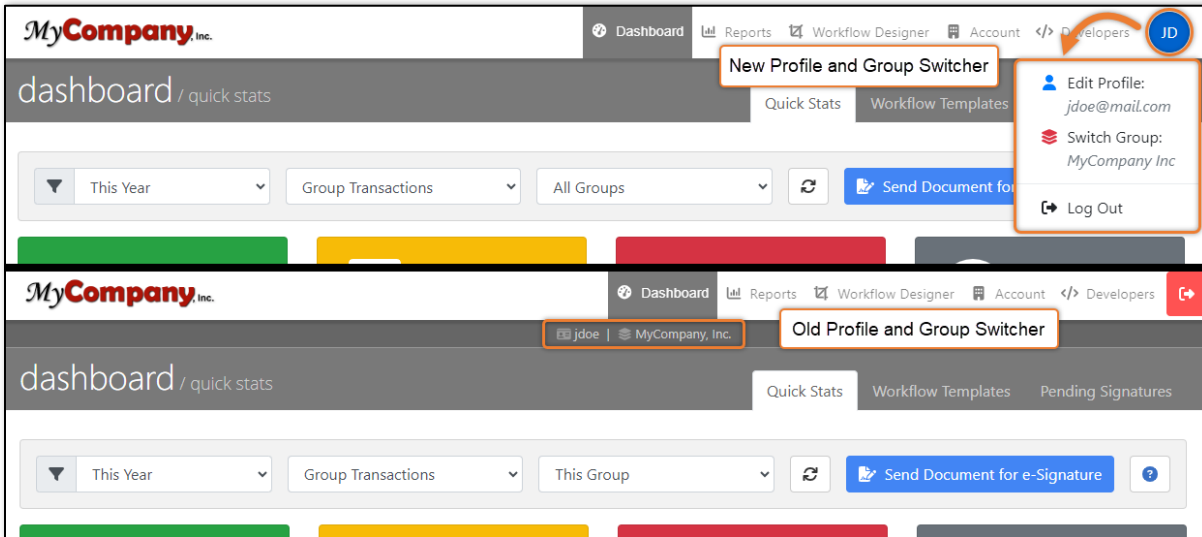
Improved HSM failure handling and fixed issue where completed email messages were not being sent when a transaction was completed.

- [PEP-7499] ~ControlPanel ~UI/UX ~Workflows

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.

- [PEP-7365] ~ControlPanel ~UI/UX

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] ~ControlPanel ~Transactions

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

- [PEP-7352] ~API/WebServices ~EventSubscriptions

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.

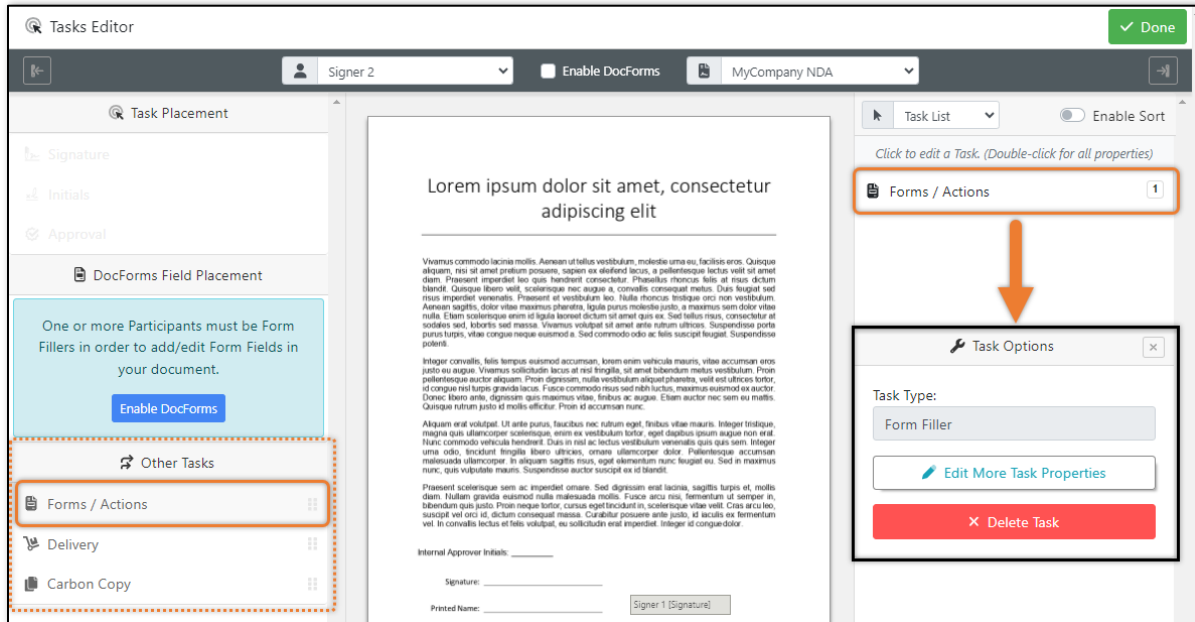
```

{
  "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"
        }
      ]
    }
  ]
}

```

- [PEP-7282] ~ControlPanel ~Documents ~Forms ~UI/UX ~Workflows

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] ~Logging ~UI/UX

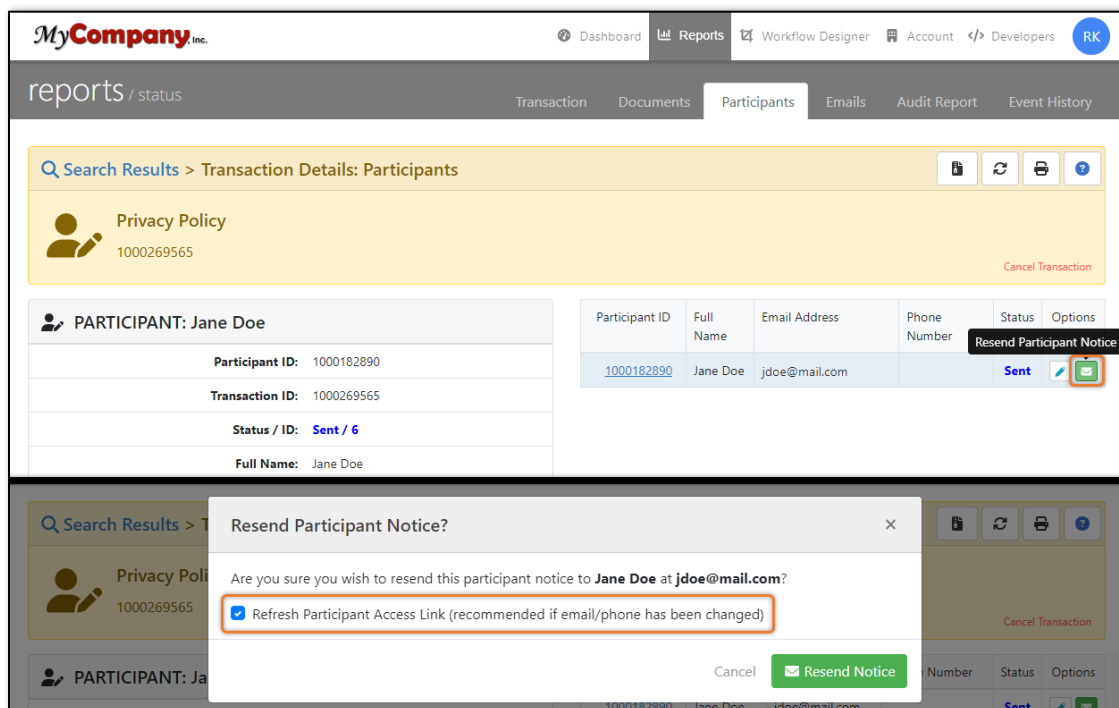
Improved the precision of timestamps on filenames for JSON logs by adding seconds to the API JSON logs filename.

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

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

- [PEP-7140] ~API/WebServices ~ControlPanel ~Notifications ~UI/UX

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] ~Infrastructure ~Installer

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

- [PEP-6708] ~Infrastructure ~Integrations

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.

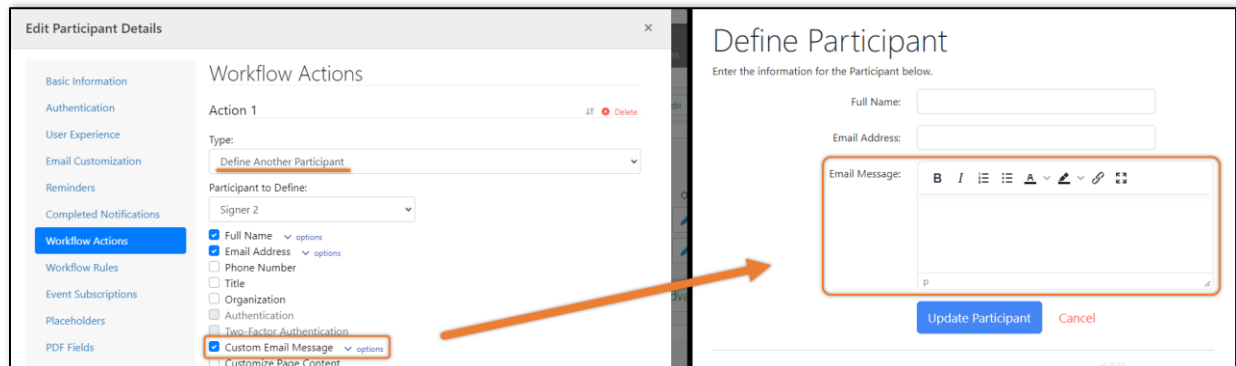
```

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

```

- [PEP-6615] ~ControlPanel ~Emails ~UI/UX ~WorkflowActions

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] ~ControlPanel ~Workflows

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]** ~Infrastructure

Fixed issue where an expired license was preventing the application and service from running properly.

- **[PEP-7577]** ~Forms ~UI/UX

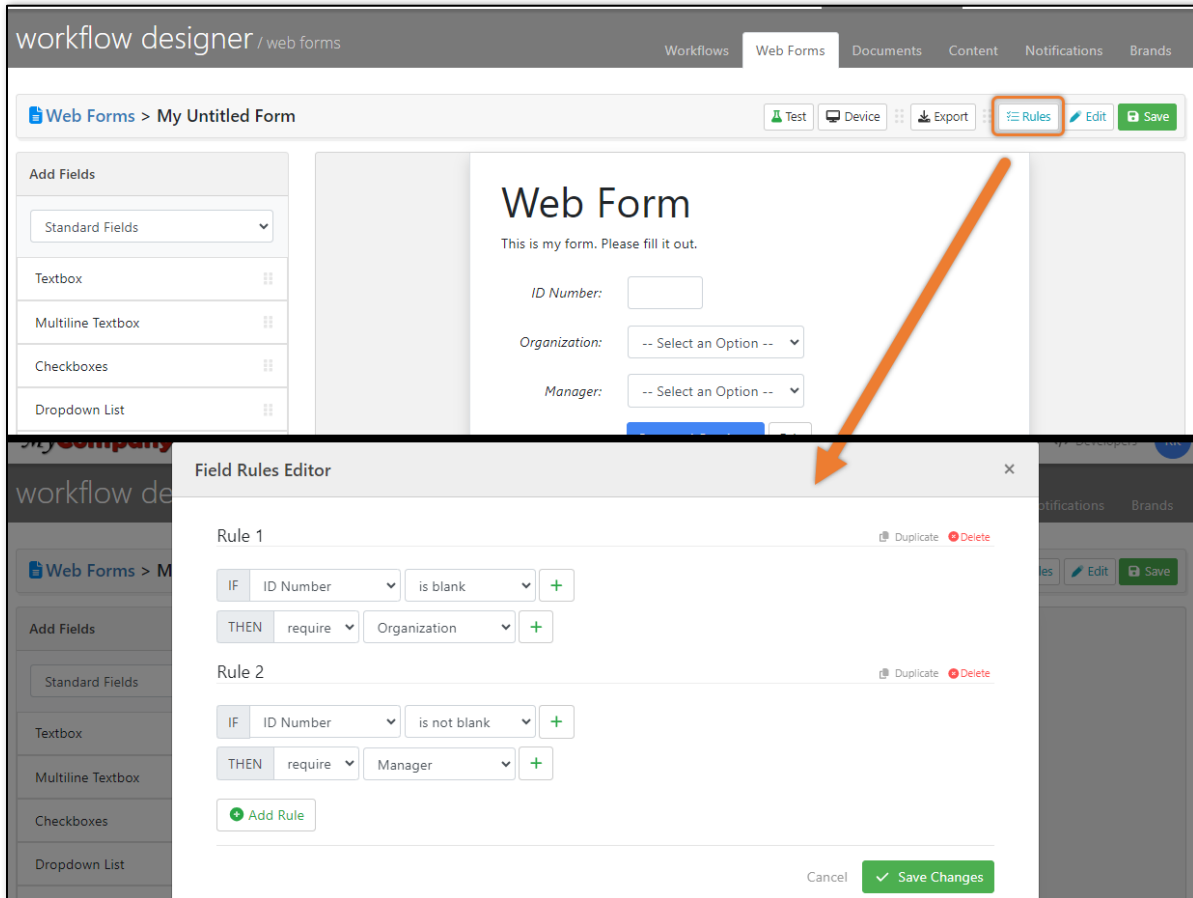
Fixed issue where checkboxes and radio buttons selected by a prior participant were hard to see when the next participant was signing. Read-only field data is now more clearly visible in the DocForms UI. Please see the image below for an example.

- **[PEP-7576]** ~Workflows

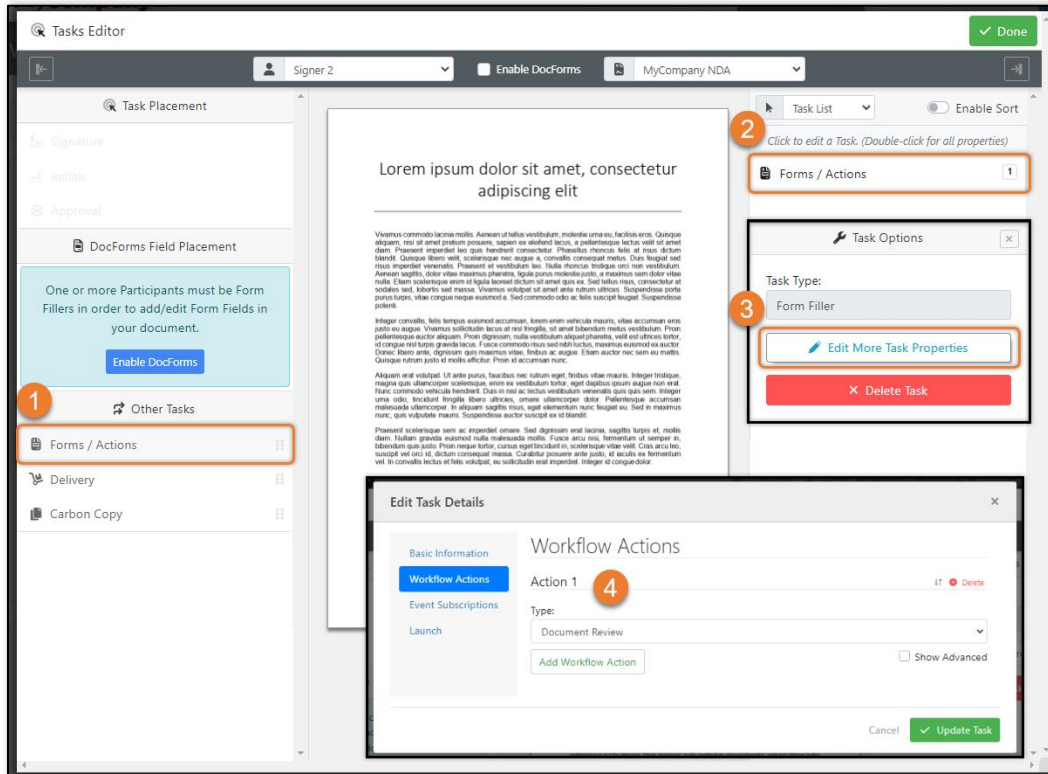
Fixed issue where HTML signings were not functional.

- **[PEP-7567]** ~Forms

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

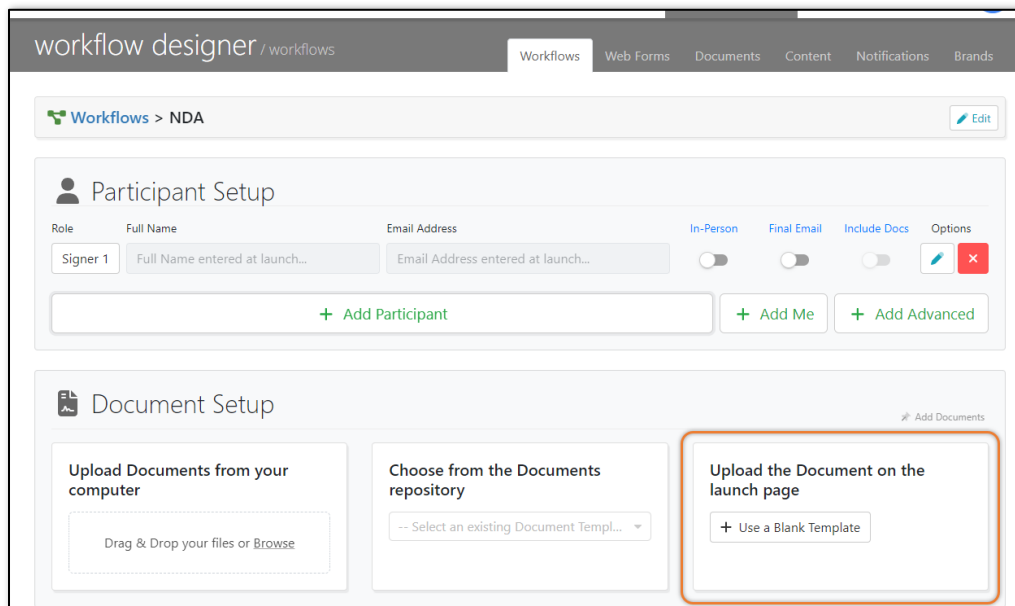


- **[PEP-7553]** ~Forms ~UI/UX ~WorkflowActions ~Workflows
Fixed issue where Task Workflow Actions would not properly save when adding them to a *Forms / Actions* task. Please see the image below for an example and the referenced settings and steps to add a Workflow Action to a *Forms / Actions* task.



- [PEP-7504] ~Documents ~Workflows

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

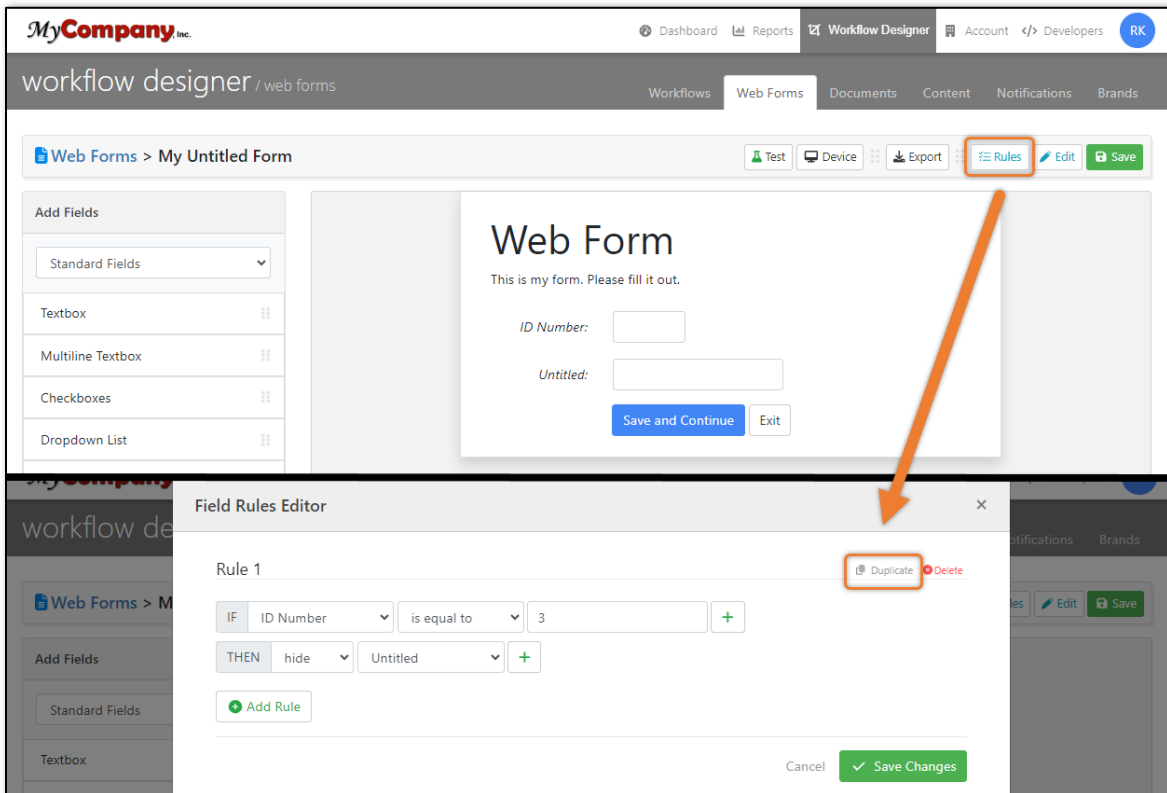


- [PEP-7494] ~ContentSets ~Workflows

Fixed issue where workflows that were exported with missing content sets would not import as expected.

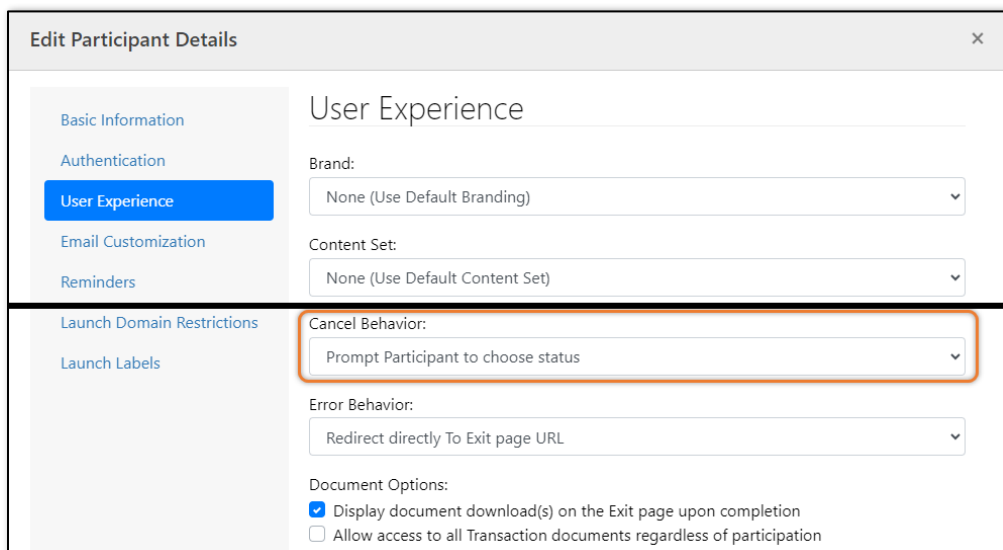
• [PEP-7486] ~Forms ~UI/UX

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



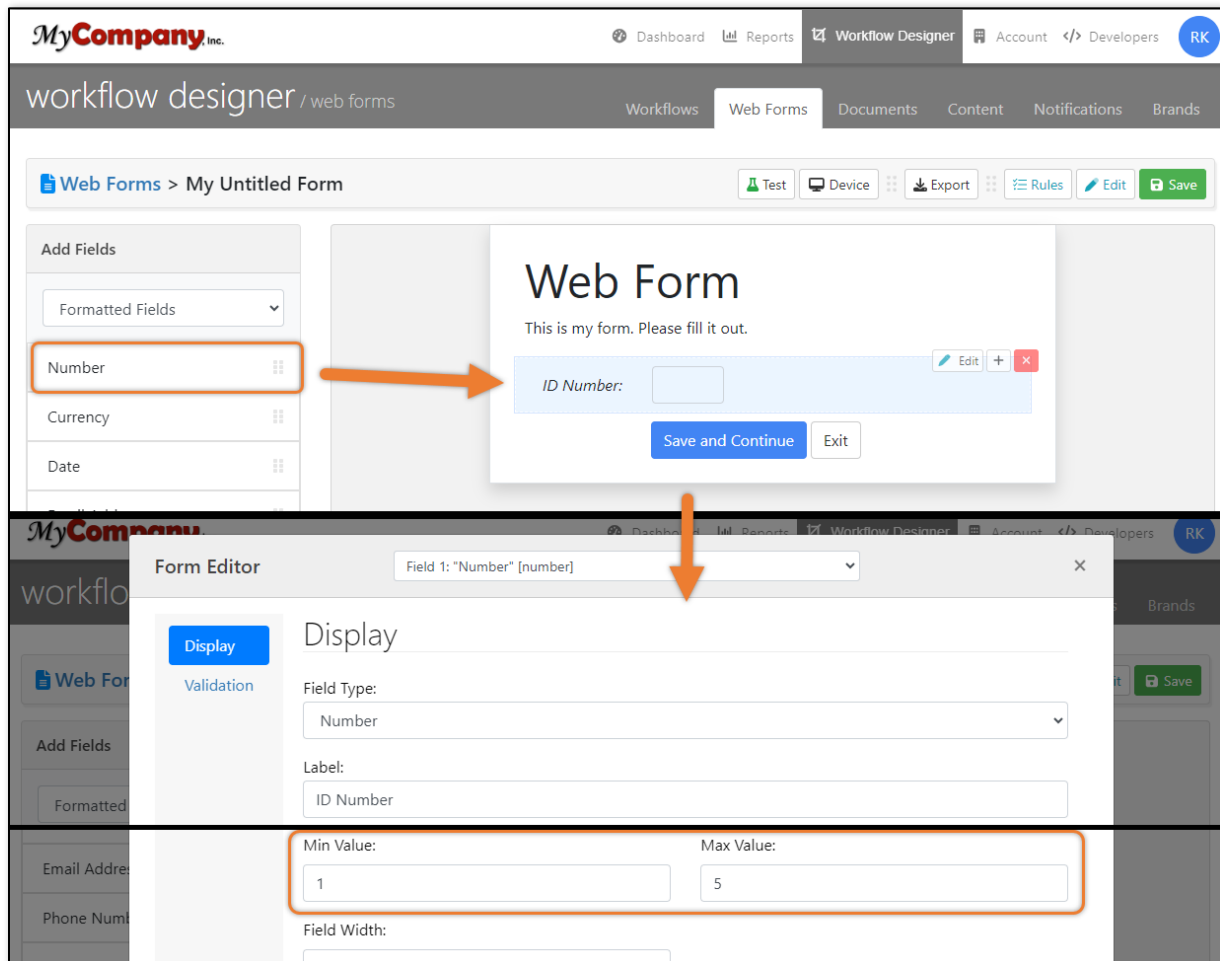
• [PEP-7483] ~Transactions ~UI/UX ~WorkflowActions ~Workflows

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.



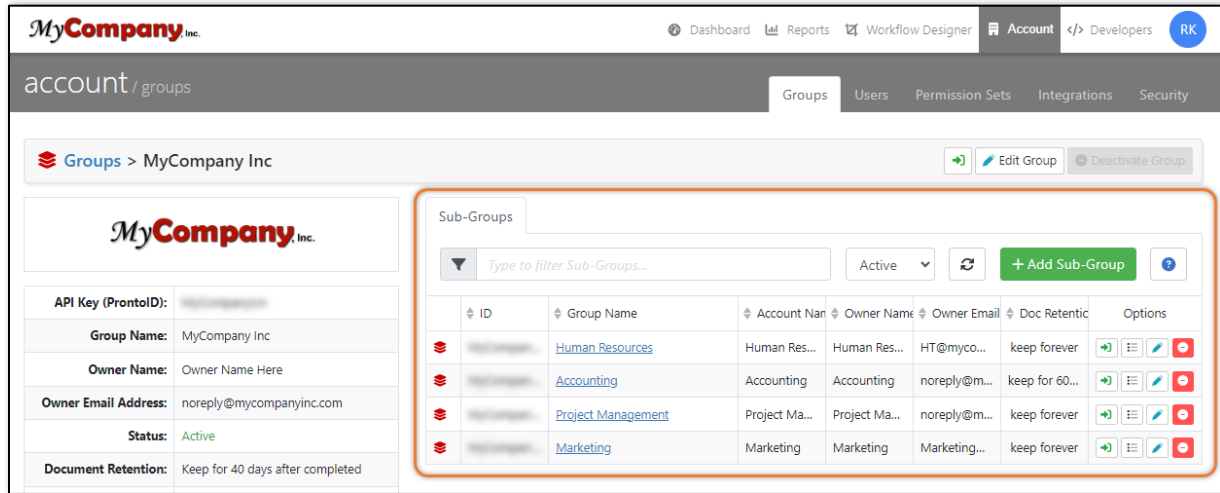
- **[PEP-7460] ~Forms**

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.



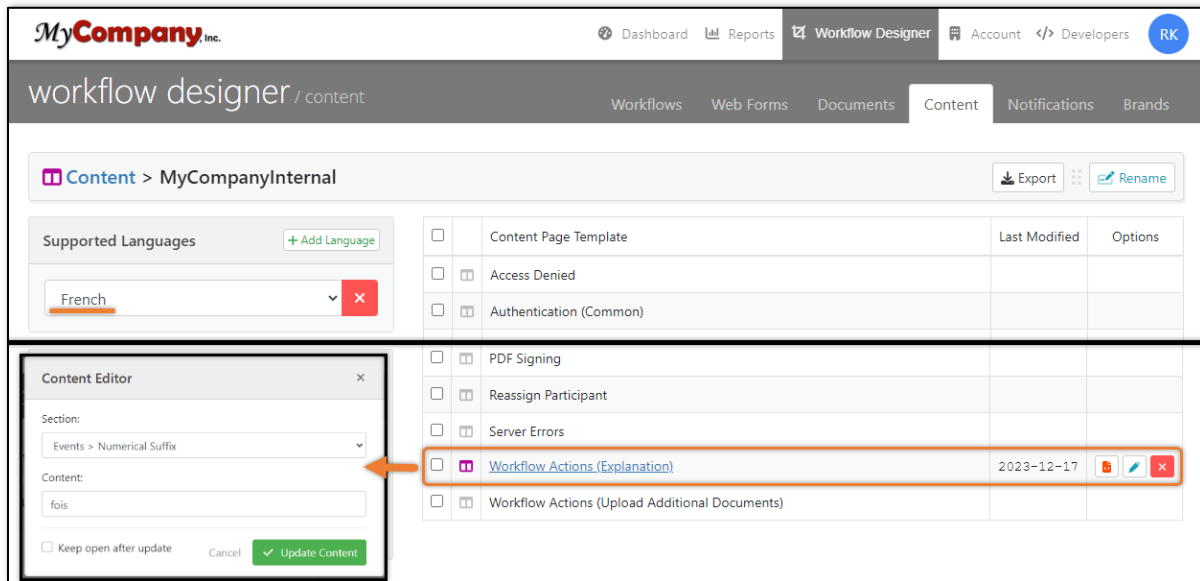
- **[PEP-7445] ~Groups ~UI/UX**

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] ~ContentSets ~WorkflowActions

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.



• [PEP-7436] ~Emails ~Notifications

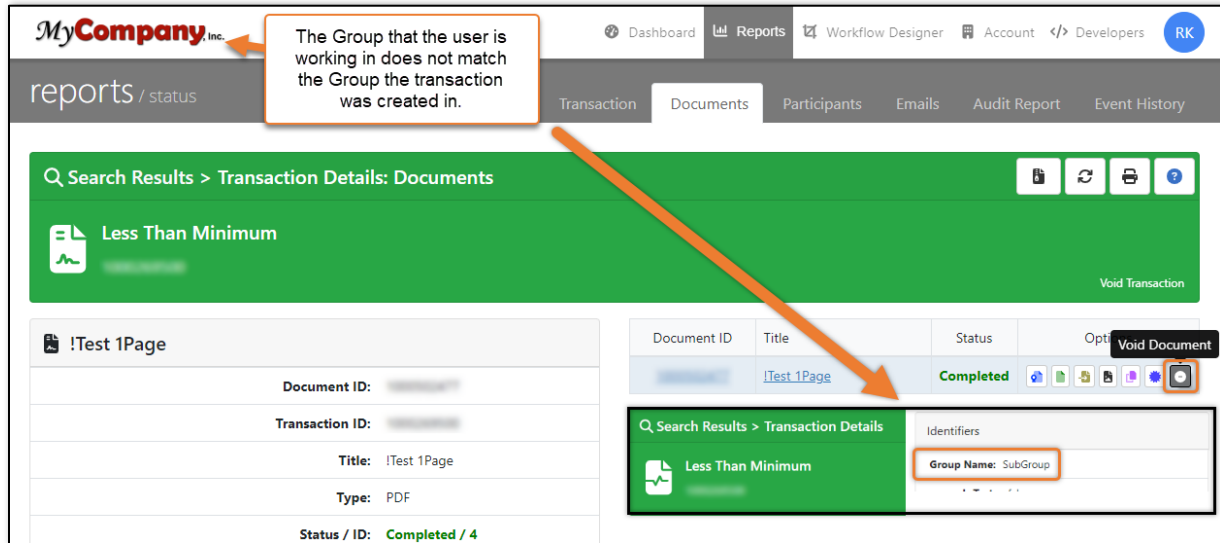
Fixed issue where expiration notices were not being sent for expired transactions.

• [PEP-7372] ~Access/Permissions ~Authentication

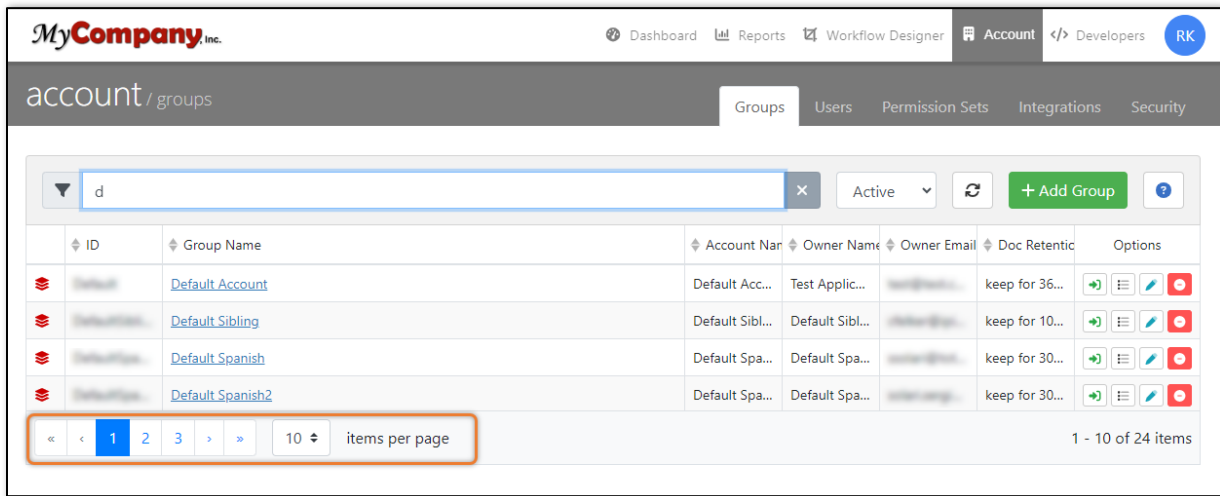
Fixed issue where the failed login attempt status code could cause confusion when received. Changed failed login attempt status code from 400 to 403 to provide the forbidden response.

• [PEP-7266] ~Documents ~Reports ~Transactions

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]** ~Installer
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]** ~ControlPanel ~Groups ~UI/UX
Fixed issue where the Groups page was missing the pagination bar when using the search filter. Please see the image below for an example.



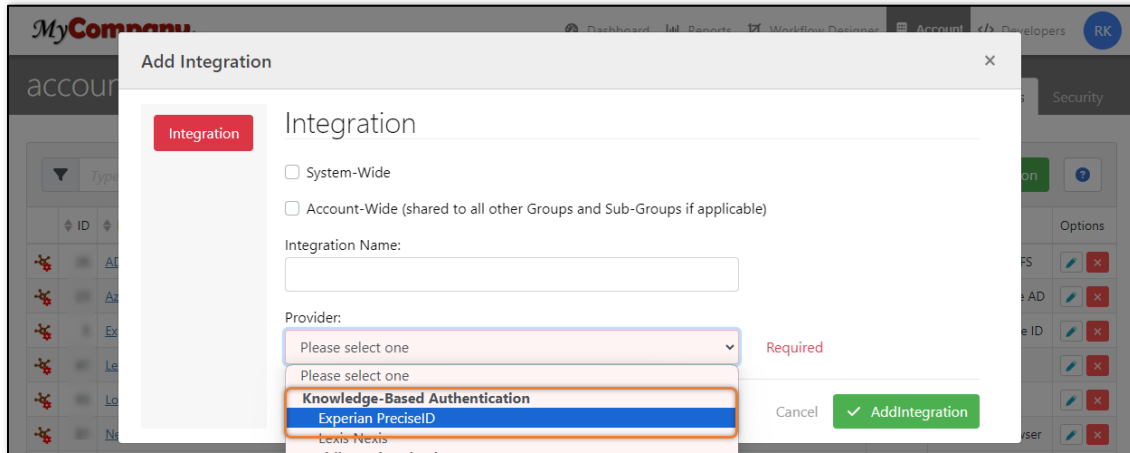
- **[PEP-6927]** ~Documents ~Reports ~Transactions
Fixed issue where HTML documents could not be verified in the control panel. Please see the image below for the referenced setting.

The screenshot shows the 'MyCompany Inc.' iPipeline interface. The top navigation bar includes 'Dashboard', 'Reports', 'Workflow Designer', 'Account', and 'Developers'. The 'Reports' section is active, showing 'Transaction' and 'Documents' tabs. A search bar indicates 'Search Results > Transaction Details: Documents'. A green banner displays 'Less Than Minimum' and 'Void Transaction'. Below this, a table lists document details for '!Test 1Page', including Document ID, Transaction ID, Title, Type (PDF), and Status (Completed / 4). An orange arrow points to the 'Verify Document' button in the table's action column. The bottom section, titled 'Document File Verification', provides instructions and a form with fields for 'Document ID' and 'File to Verify', along with a 'Verify Document' button.

• [PEP-2348] ~Integrations ~Signatures

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.

The first screenshot shows a signature verification form with fields for Signature, Name, Title, and Date. The Name field contains 'Lee Kizer 3'. An orange arrow points to the '3' with a text box stating: 'Should be the Roman numeral 'III' and not the number '3''. The second screenshot, titled 'Identity Verification Required', shows a form for legal name verification with fields for First Name, Middle Name, Last Name, and Suffix. The Suffix field contains 'III', with an orange arrow pointing to it.



v5.17.15 Release

Release Date: 3/21/2024

Important Notes:

The update in version 5.17.15 is not included in version 5.18.0.

Bug Fixes

- [PEP-7718] ~Documents ~Signing

Fixed issue where a query for the Document Review page was running slowly. Updated the query to return fewer field properties to increase database query performance.

v5.17.14 Release

Release Date: 3/20/2024

Important Notes:

The update in version 5.17.14 is not included in version 5.18.0.

Bug Fixes

- [PEP-7718] ~Documents ~Signing

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

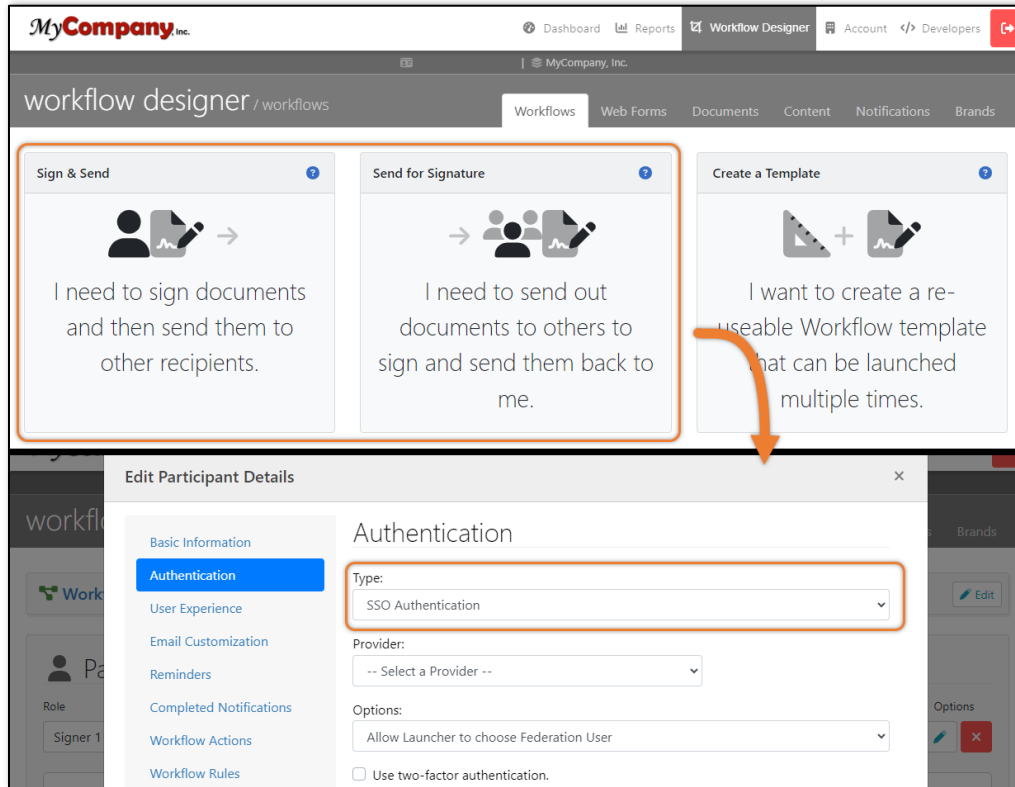
Important Notes:

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

Bug Fixes

- [PEP-7736] ~Authentication ~ControlPanel

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.



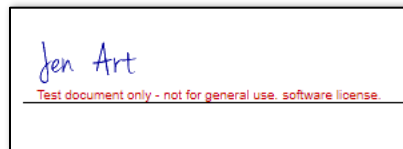
v5.17.13 Release

Release Date: 2/15/2024

Bug Fixes

- [PEP-7672] ~Signatures

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.



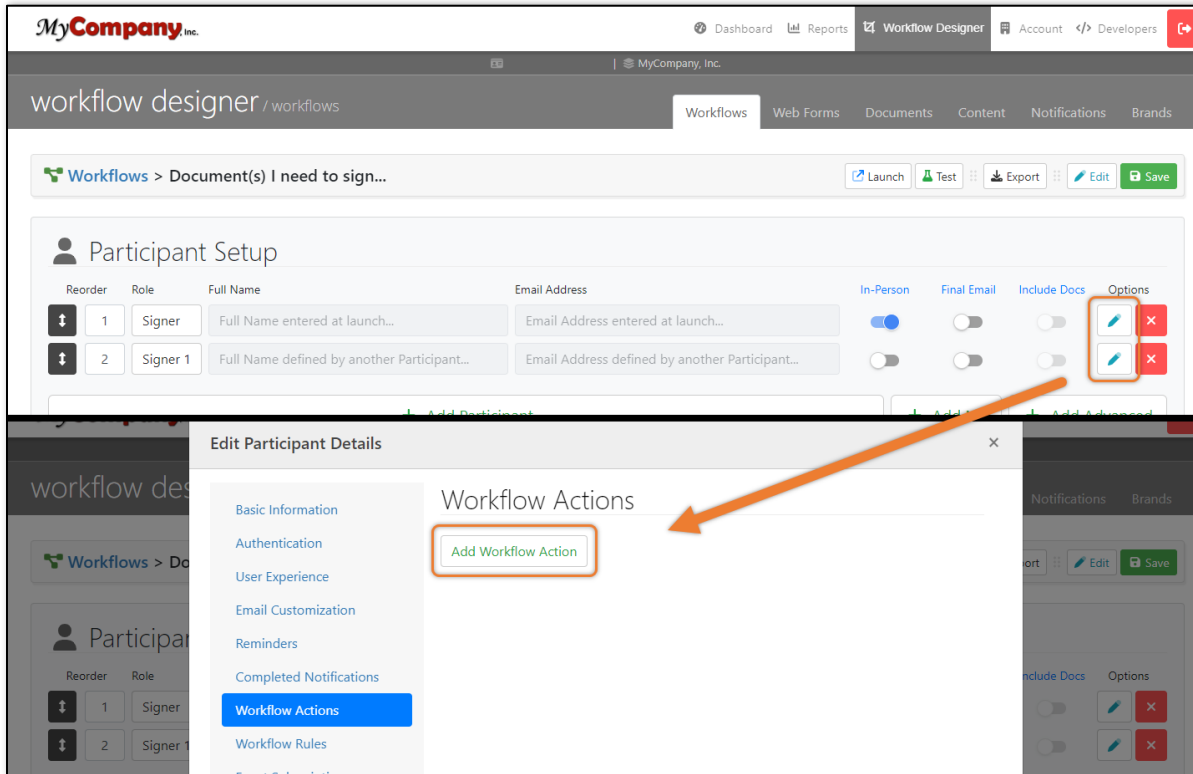
v5.17.12 Release

Release Date: 12/14/2023

Bug Fixes

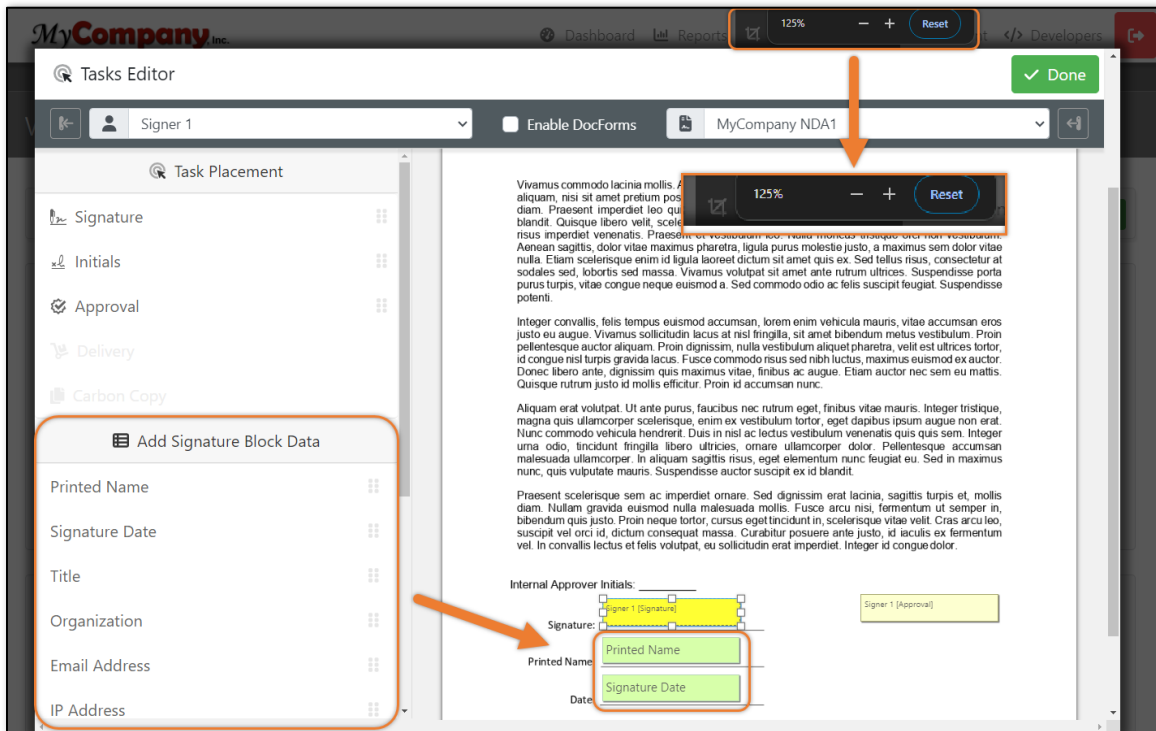
- [PEP-7482] ~ControlPanel ~UI/UX ~Workflows ~WorkflowActions

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.



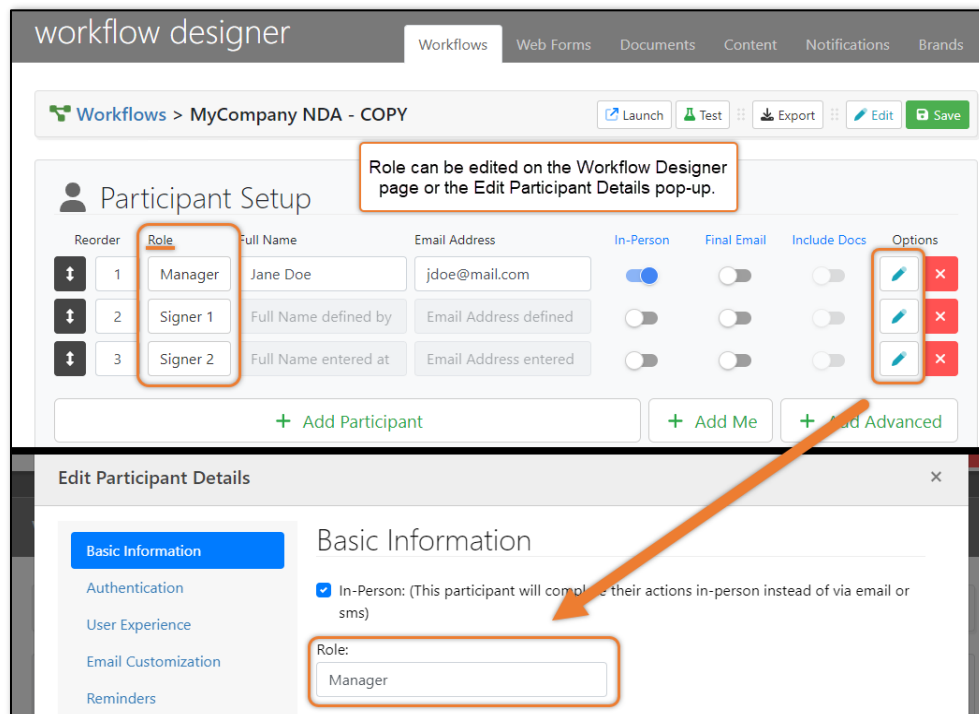
- **[PEP-7343] ~Signatures ~Signing**

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] ~ControlPanel ~Transactions

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.



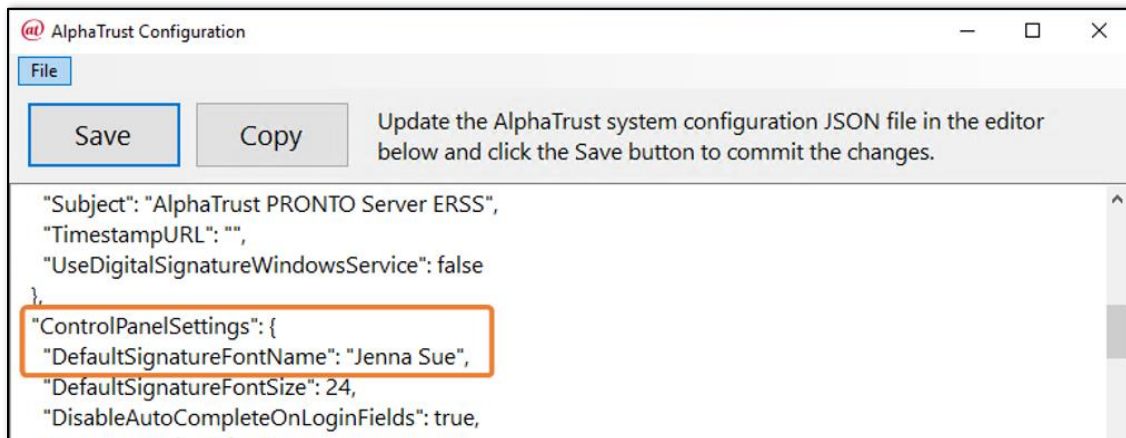
v5.17.11 Release

Release Date: 11/20/2023

Bug Fixes

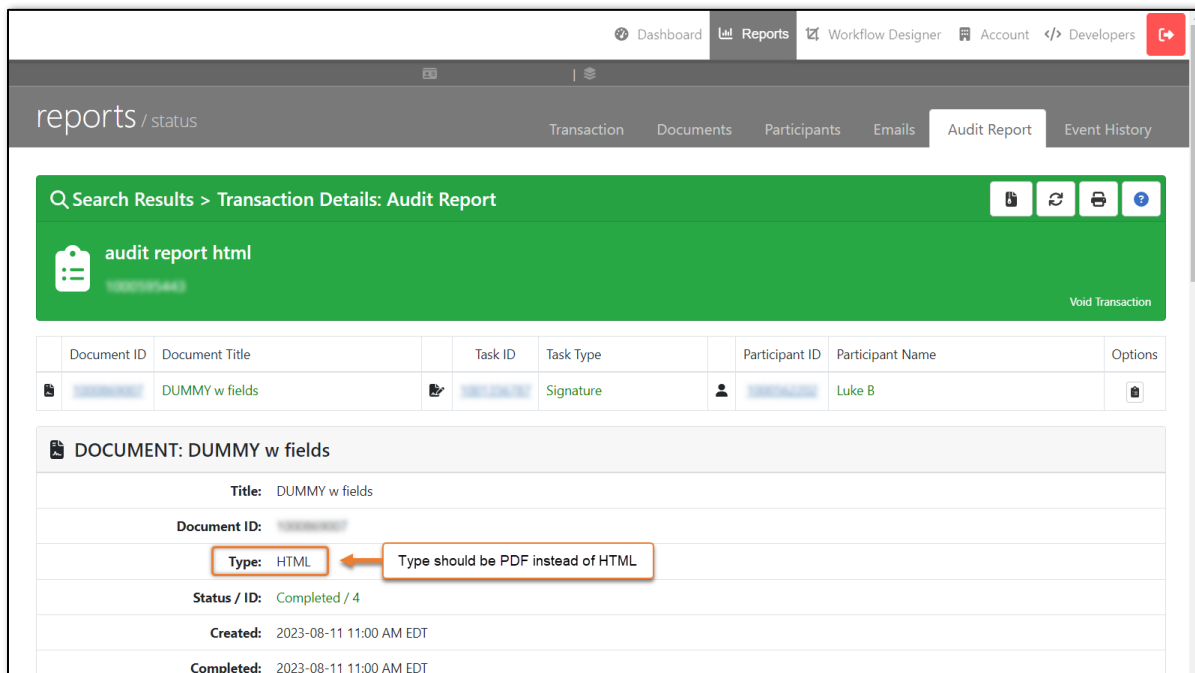
- **[PEP-7449]** ~Signing ~UI/UX

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]** ~AuditReport ~ControlPanel ~Reports ~UI/UX

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.



v5.17.10 Release

Release Date: 11/16/2023

Bug Fixes

- **[PEP-7407]** ~Transactions

Fixed issue where closing transactions could cause 502 Gateway Errors.

- **[PEP-7401]** ~API/WebServices ~Signing

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]** ~Workflows

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.

Edit Participant Details

Basic Information
Authentication
User Experience
Email Customization
Reminders
Completed Notifications
Workflow Actions
Workflow Rules
Event Subscriptions

Workflow Rules

Custom Exit Url:

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

Verify/Query for:
☐ Full Name
☐ Email Address
☐ Title
☐ Organization

Document Access Window:
Leave Document available minutes after completed

Tasks Editor

Signer 1
Enable DocForms
New Patient Form 1

New Patient Form

Date: [Date] Full Name: [Full Name] Phone: [Phone]
Date of Birth: [Date of Birth] Gender: [Gender] Email: [Email]
Address: [Address] City: [City] State: [State] Zip: [Zip]
Employer Name, Address, & Phone: MyCompany, Inc, 1234 Corporate Street, 690-123-4567, 890-123-4567
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? _____
Where do you feel the problem? What is your major complaint?
Please indicate if you are here because of: ☐ An on the job injury ☐ An auto accident ☐ A home injury
Date of Injury: _____ Insurance Company: _____
Attorney's Name & Address (if any): _____
Have you ever had any falls, auto accidents, or major injuries? ☐ Yes ☐ No
Year: _____ Type of Accident: _____ Describe Injury: _____

Task Options

Task Type: Signature
Label: _____
Actual field name in final PDF: _____
Participant: Signer 1
Application Type: Font-Stamped (Default)
☒ Optional
Edit More Task Properties
Clone Task
Delete Task

• [PEP-7376] ~Notifications ~Transactions

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.

reports / status

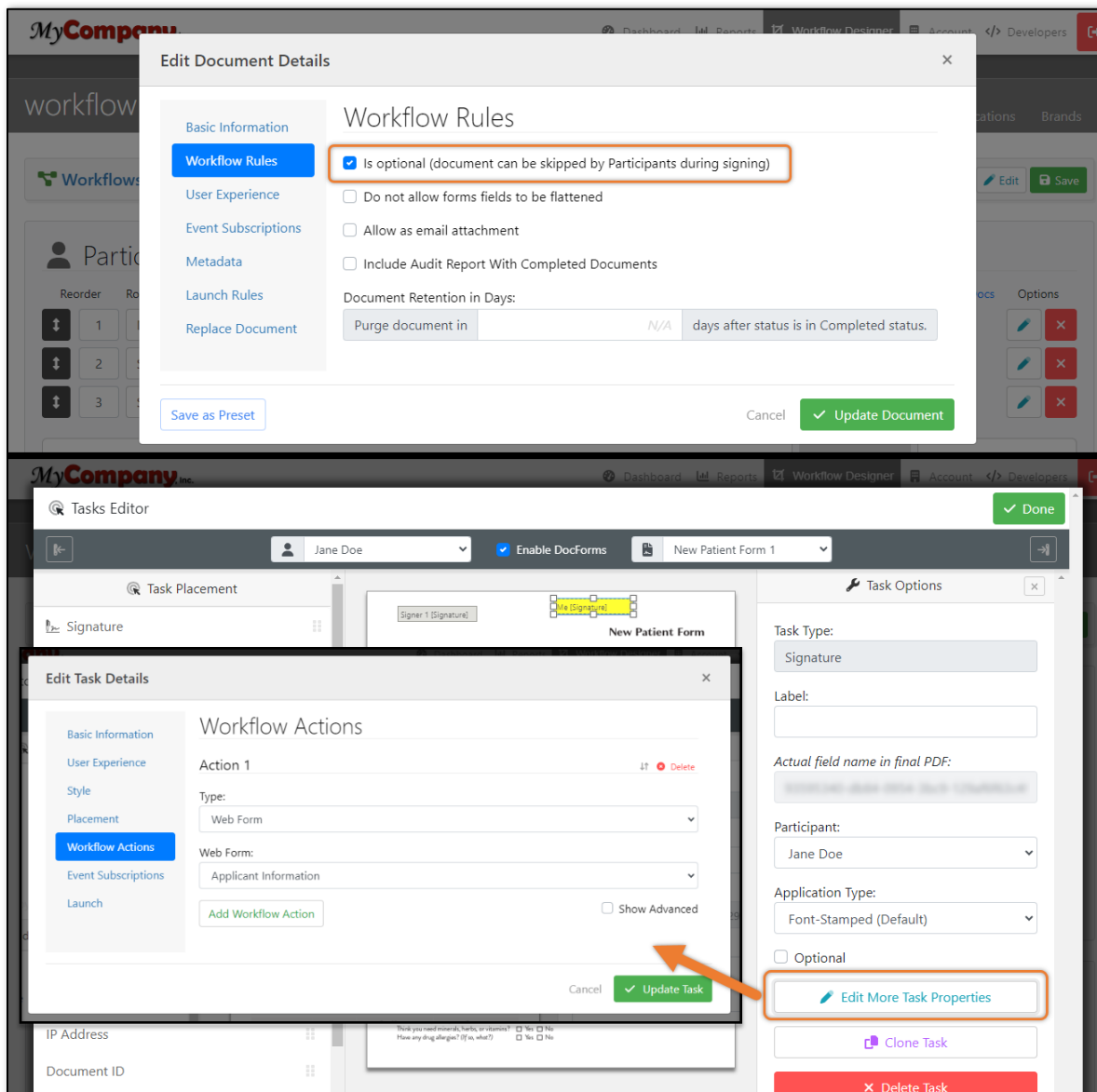
Status Trends Completion Rates Verify Document

Search by Transaction ID or d 2023-10-01 ~ 2023-10-31 Pending Search Advanced

Transaction ID	Description	Group	Created Date		
	MyCompany NDA - COPY	MyCompany, Inc.	2023-10-26 04:58 PM EDT	Pending	Close Transaction

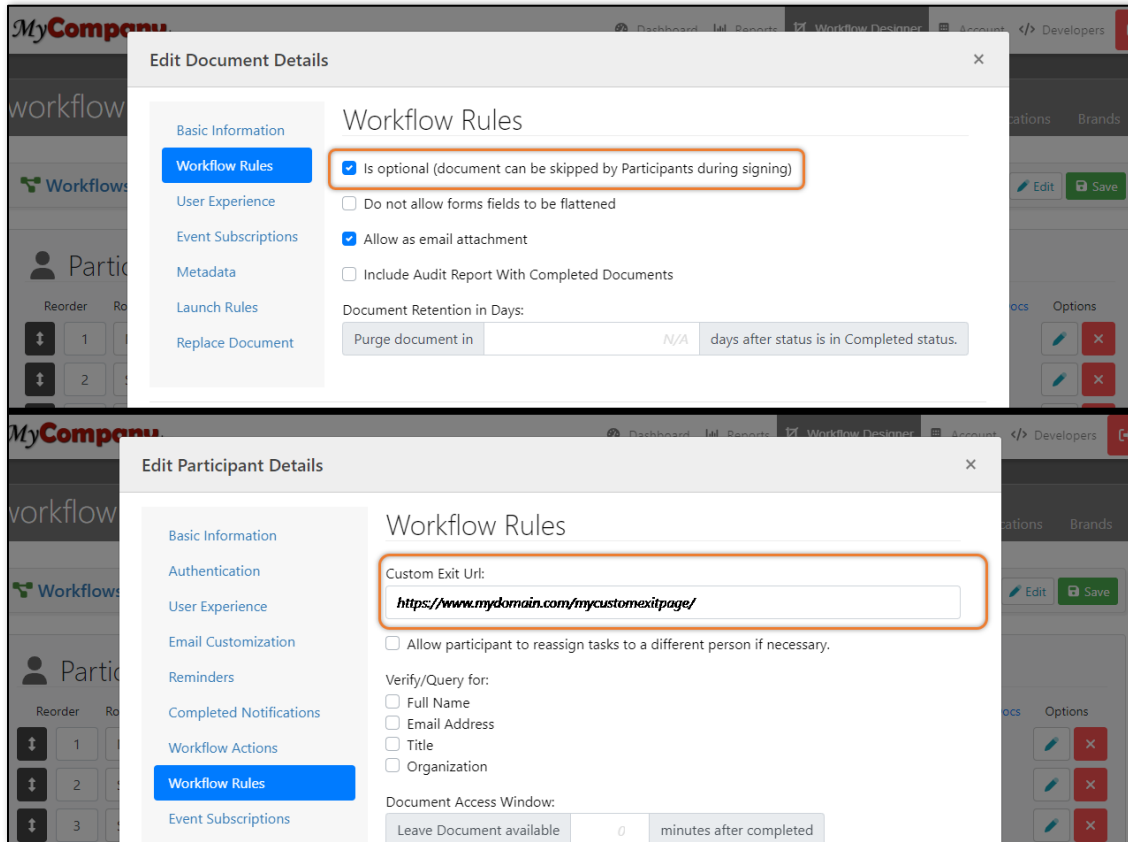
- [PEP-7331] ~Documents ~Signing ~UI/UX ~WorkflowActions

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.



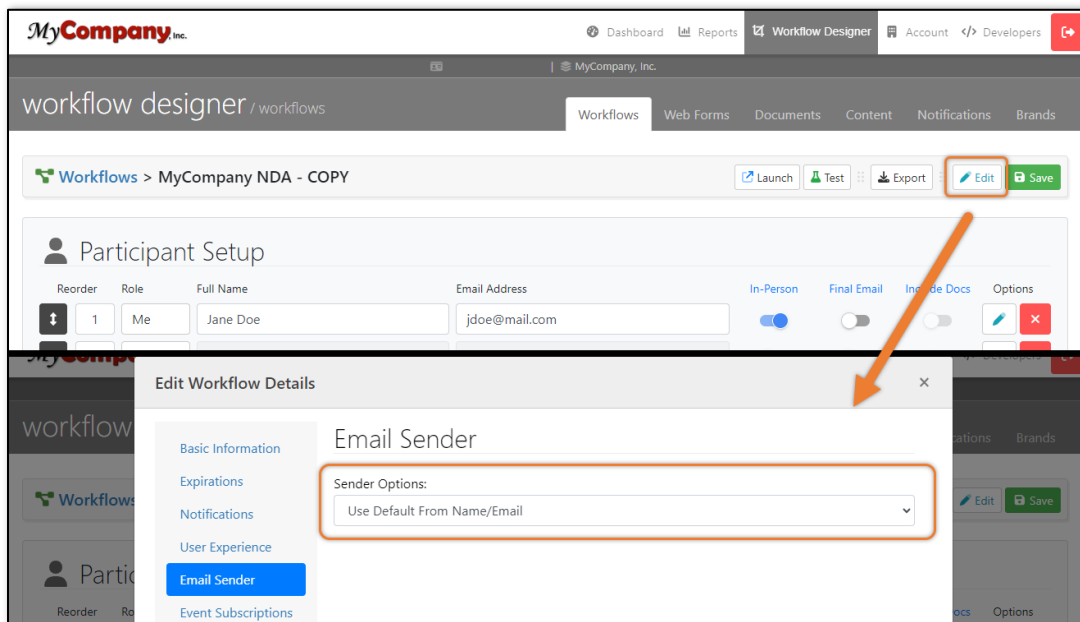
- [PEP-7330] ~Documents ~Signing ~UI/UX

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.



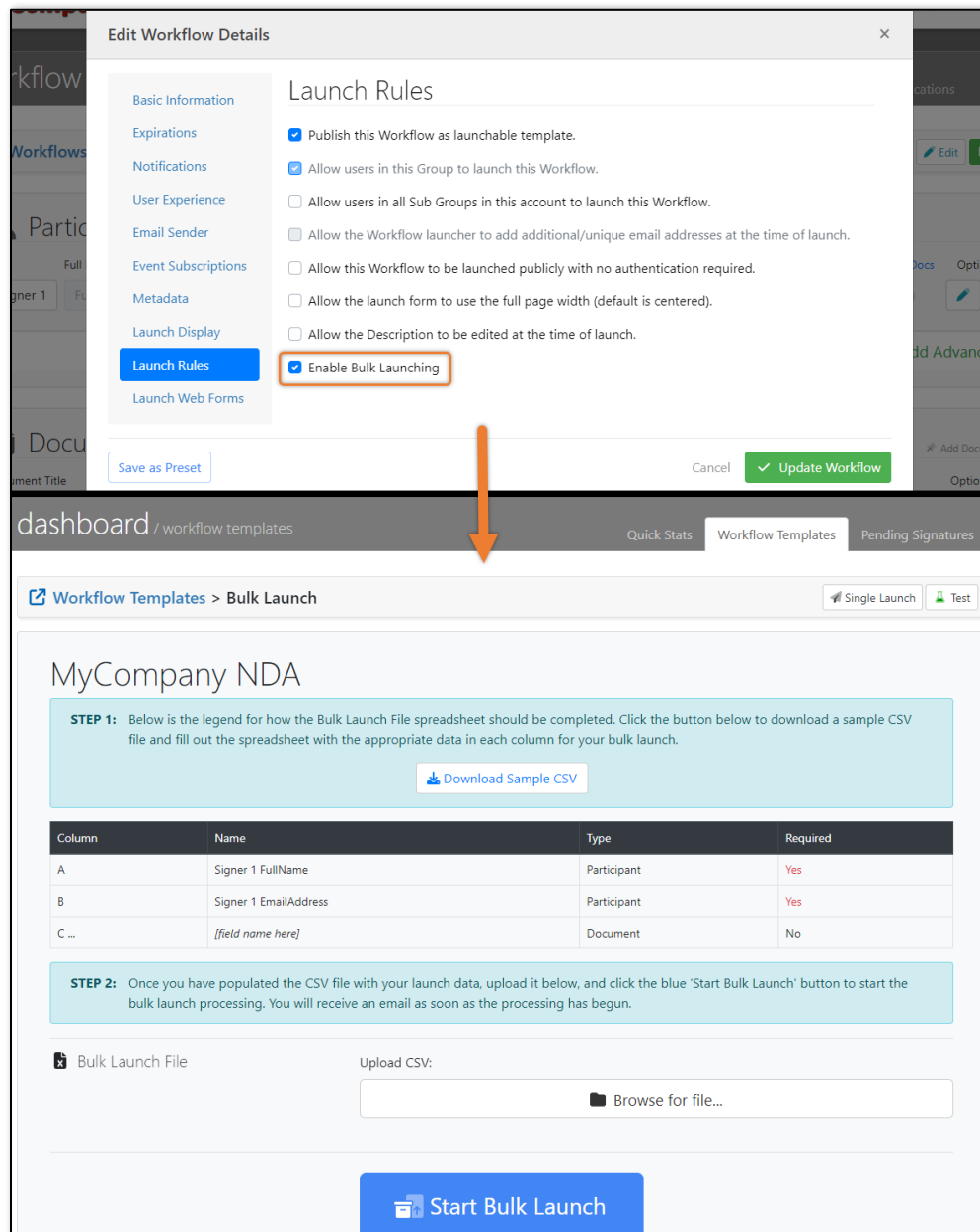
• [PEP-7309] ~UI/UX ~Workflows

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] ~ControlPanel ~UI/UX ~Workflows

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

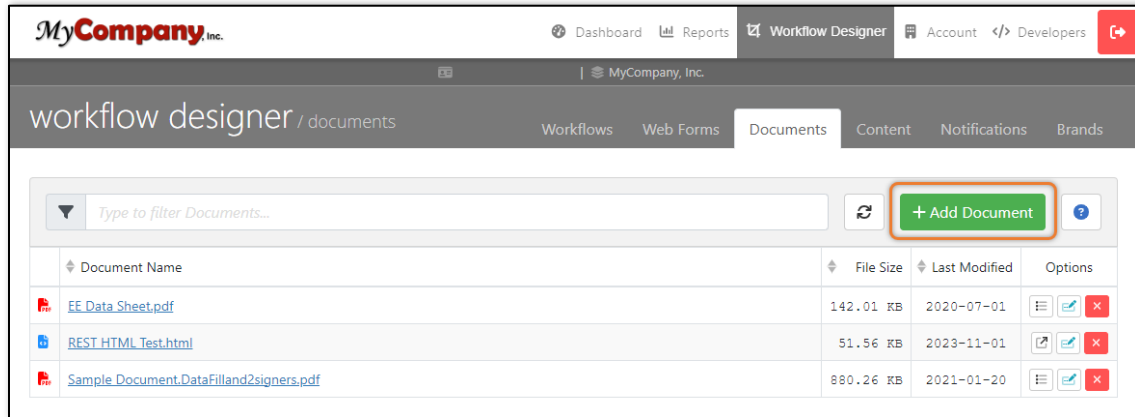


- [PEP-6603] ~Installer

Added database index to prevent performance issues when querying for transaction token data.

- [PEP-3116] ~ControlPanel ~Documents

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.



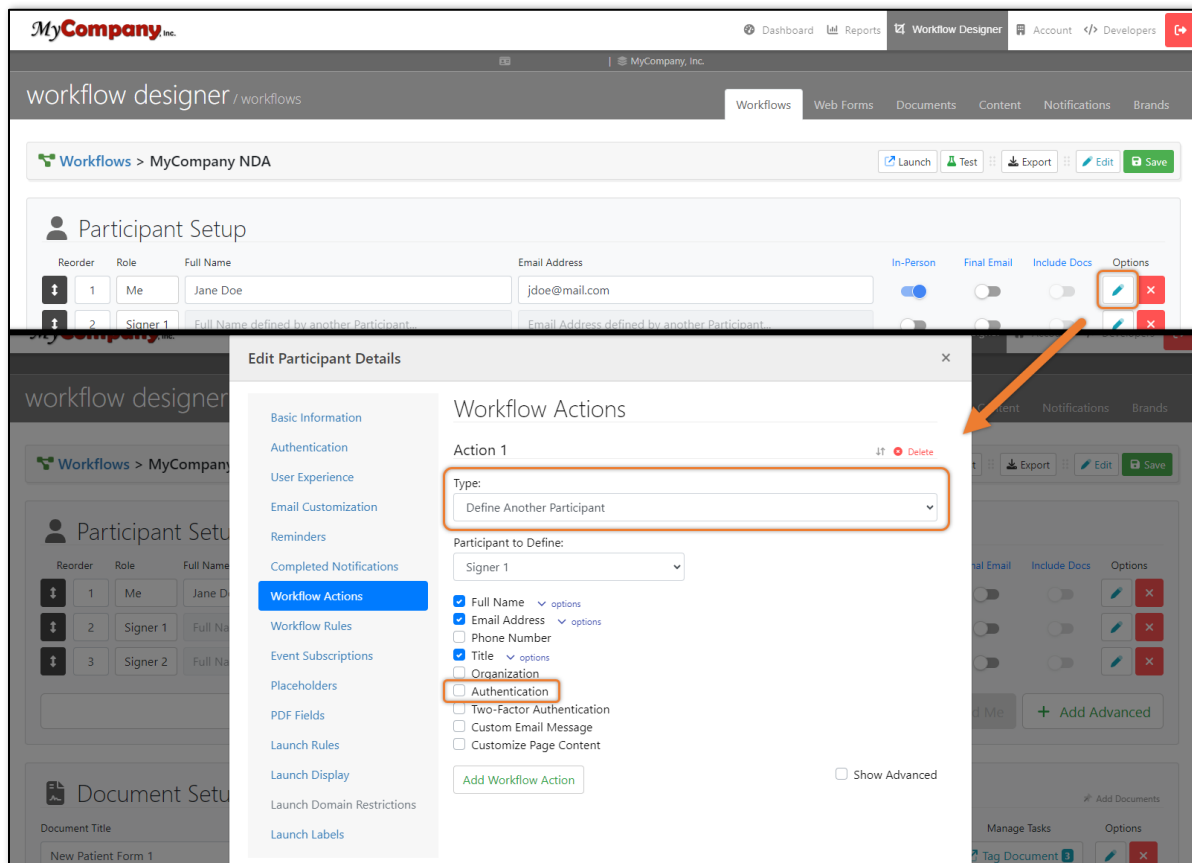
v5.17.9.1 Release

Release Date: 11/20/2023

Bug Fixes

- [PEP-7440] ~WorkflowActions**

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.



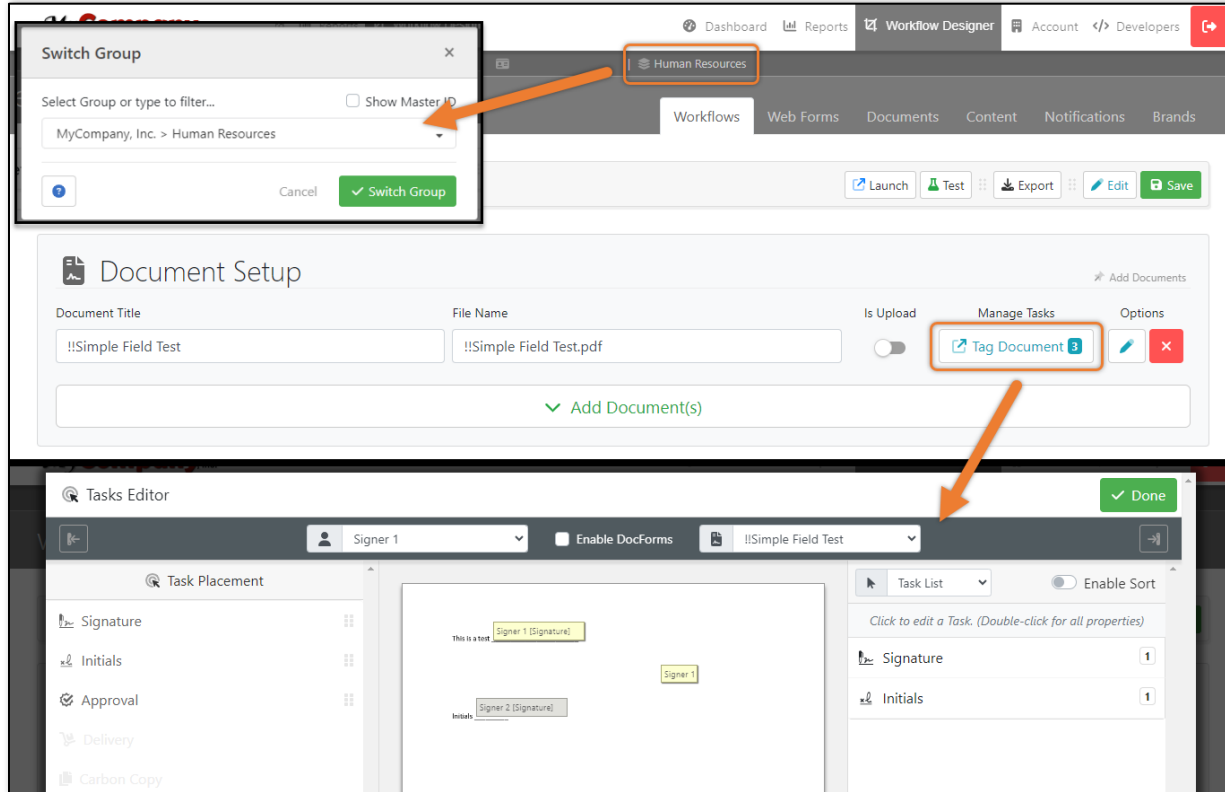
v5.17.9 Release

Release Date: 11/3/2023

Bug Fixes

- **[PEP-7348]** ~ControlPanel ~Documents

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.



- **[PEP-7327]** ~Documents ~Security

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]** ~Infrastructure ~Installer

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]** ~API/WebServices ~UI/UX ~WorkflowActions ~Workflows

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.

The screenshots illustrate the process of configuring a document and its associated tasks in the iPipeline Workflow Designer.

Document Setup: The 'Document Setup' screen for 'MyCompany NDA' shows the 'Document Title' as 'New Patient Form 1' and the 'File Name' as 'New_Patient_Form_1.pdf'. The 'Is Upload' toggle is off. The 'Manage Tasks' section includes a 'Tag Document' button, which is highlighted with an orange box and an arrow pointing to the 'Tasks Editor'.

Tasks Editor: The 'Tasks Editor' for 'New Patient Form 1' shows a 'Task Placement' area with a 'Signature' task. The 'Task Options' panel on the right shows the 'Task Type' as 'Signature' and the 'Participant' as 'Signer 1'. The 'Edit More Task Properties' button is highlighted with an orange box and an arrow pointing to the 'Edit Task Details' dialog.

Edit Task Details: The 'Edit Task Details' dialog for 'Workflow Actions' shows 'Action 1' with a 'Type' dropdown set to '-- Select Action Type --'. The 'Show Advanced' checkbox is checked. The 'Update Task' button is highlighted with an orange box.

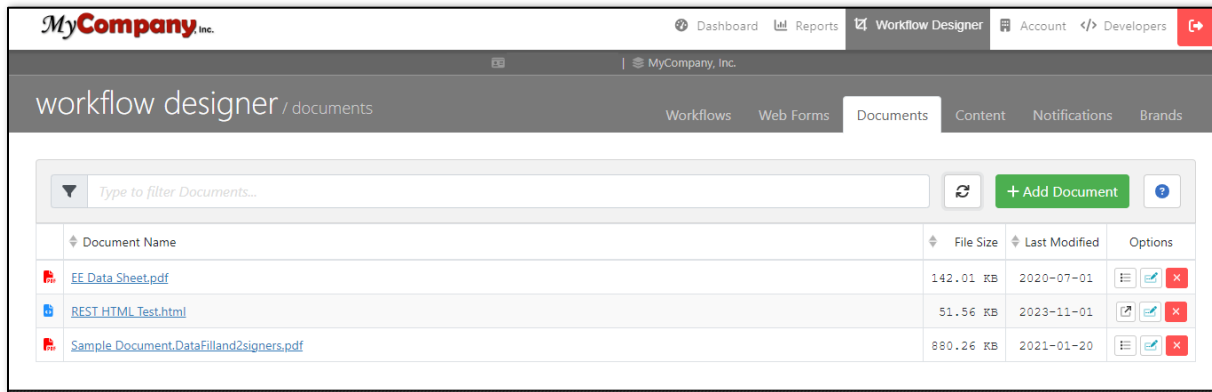
Edit Participant Details: The 'Edit Participant Details' dialog for 'Signer 1' shows the 'User Experience' tab. The 'Document/Task Status Page' dropdown is highlighted with an orange box and set to 'Off'.

- [PEP-7277] ~Infrastructure ~Installer

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.

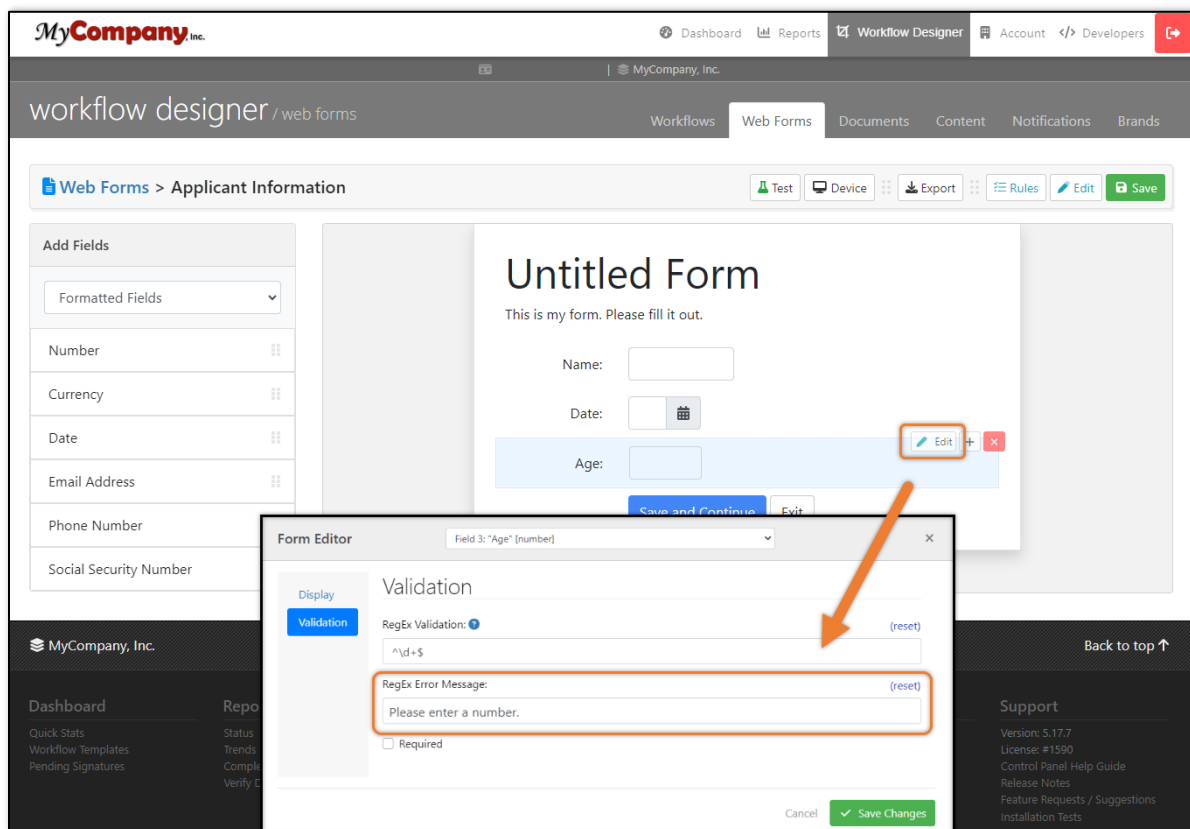
- [PEP-7228] ~ControlPanel ~Documents ~Workflows

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.



- [PEP-7199] ~Forms

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] ~Authentication ~UI/UX

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] ~Forms**

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.

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

v5.17.8 Release

Release Date: 10/23/2023

Bug Fixes

- [PEP-7325] ~ControlPanel ~Documents ~Workflows

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.

The screenshot shows the 'Edit Workflow Details' dialog box for a workflow named 'MyCompany NDA'. The 'Launch Rules' tab is active, and the 'Enable Bulk Launching' checkbox is checked and highlighted with an orange box. An orange arrow points from this checkbox to the 'Bulk Launch' section of the 'MyCompany NDA' workflow template page below.

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.
- ☒ **Enable Bulk Launching**

MyCompany NDA

STEP 1: Below is the legend for how the Bulk Launch File spreadsheet should be completed. Click the button below to download a sample CSV file and fill out the spreadsheet with the appropriate data in each column for your bulk launch.

[Download Sample CSV](#)

Column	Name	Type	Required
A	Signer 1 FullName	Participant	Yes
B	Signer 1 EmailAddress	Participant	Yes
C ...	[field name here]	Document	No

STEP 2: Once you have populated the CSV file with your launch data, upload it below, and click the blue 'Start Bulk Launch' button to start the bulk launch processing. You will receive an email as soon as the processing has begun.

Bulk Launch File

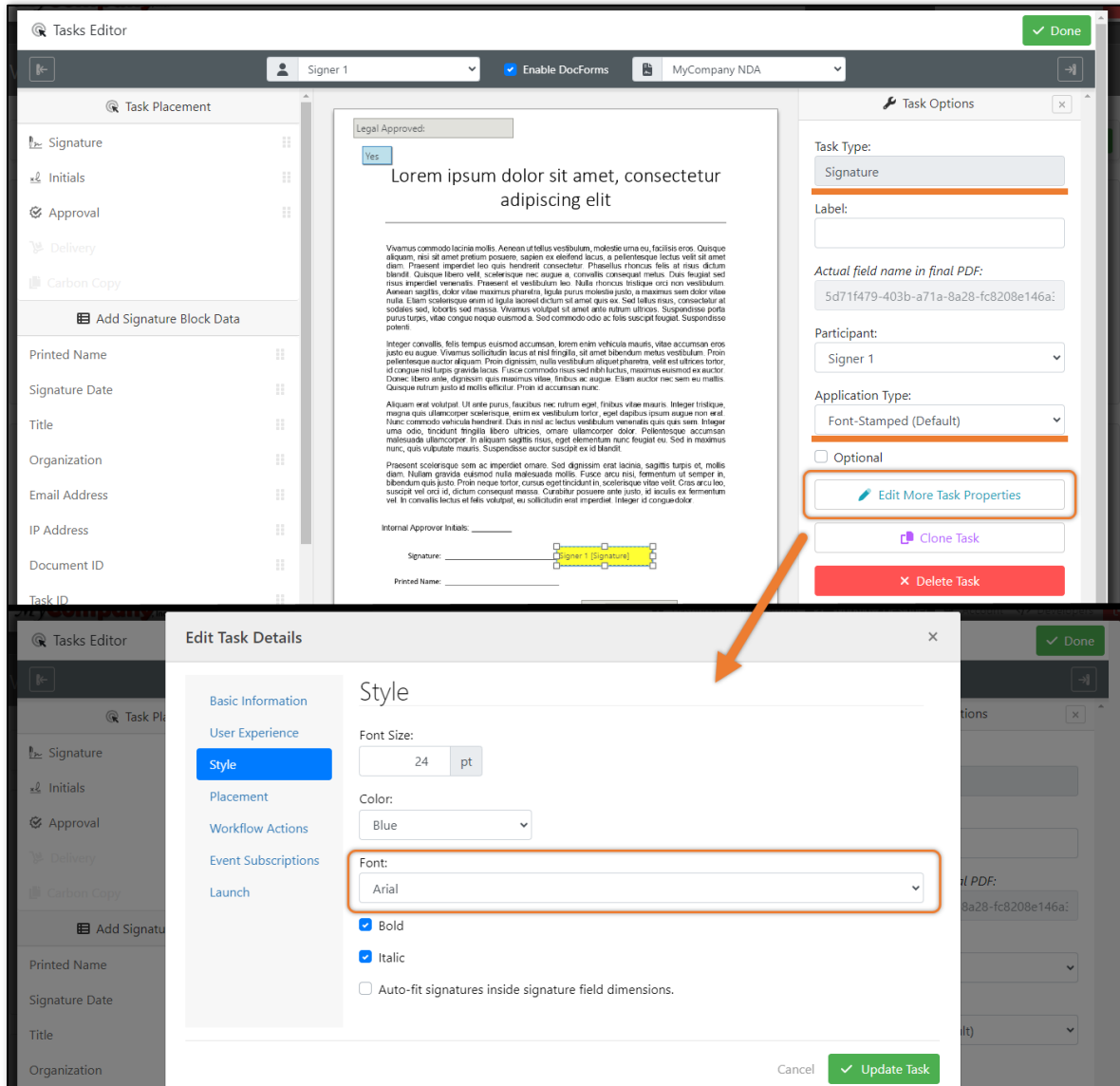
Upload CSV:

[Browse for file...](#)

[Start Bulk Launch](#)

- [PEP-7313] ~Documents ~Signatures ~Signing ~UI/UX

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.



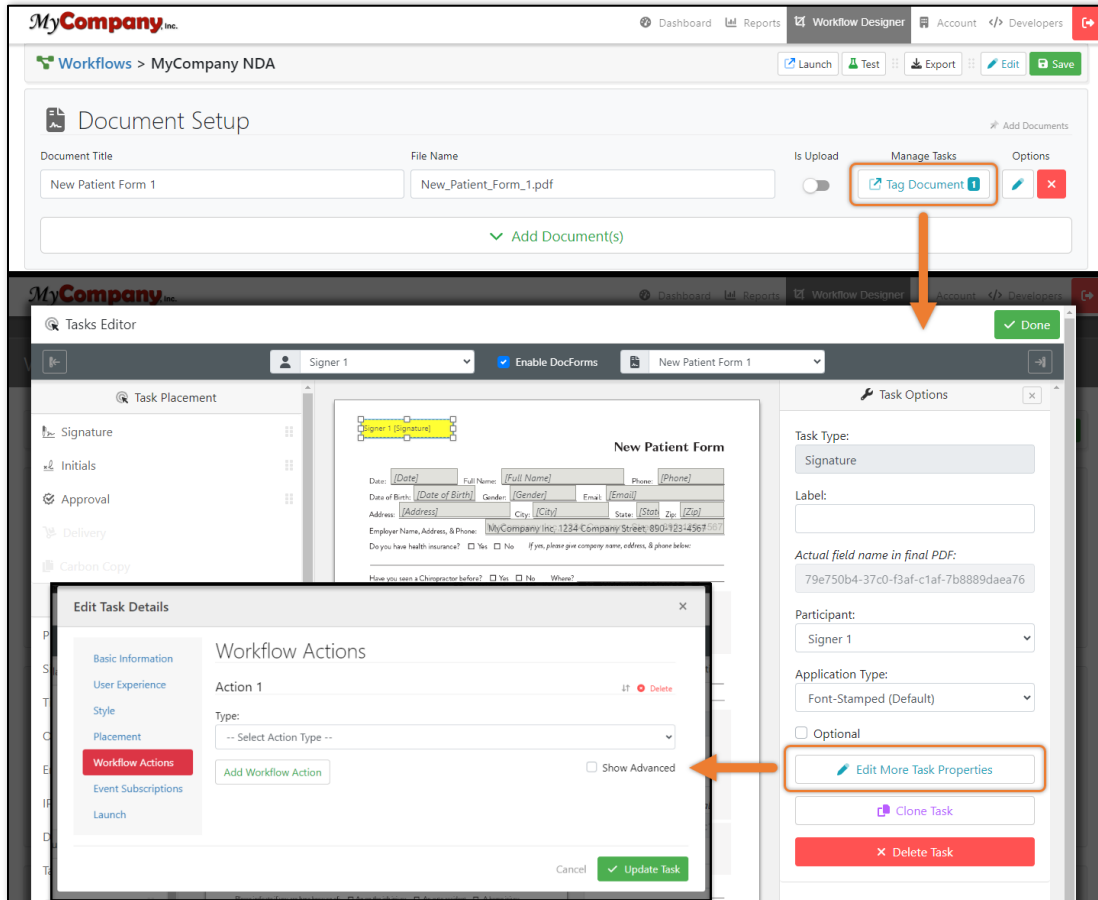
- [PEP-7303] ~ControlPanel ~Documents ~UI/UX ~Workflows

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.

The screenshot displays the 'MyCompany Inc.' Workflow Designer interface. The top navigation bar includes links for Dashboard, Reports, Workflow Designer, Account, and Developers. The main header shows 'workflow designer / workflows'. Below this, a breadcrumb trail indicates 'Workflows > MyCompany PO: 59387'. A toolbar contains buttons for Launch, Test, Export, Edit, and Save. The 'Document Setup' section shows a 'Document Title' of 'Test' and a 'File Name' of 'test'. The 'Is Upload' toggle is off, and the 'Manage Tasks' button is labeled 'Tag Document 2'. An orange arrow points from this button to the 'Field Options' panel in the 'Tasks Editor' section. The 'Field Options' panel shows a 'Radio Button' field with 'Participant: (field access)' set to 'Signer 1'. The 'Field Name' is 'RadioButton566589a', and the 'Actual field name in final PDF' is 'RadioButton566589a_es:Signer 1'. The 'Option Value' is set to 'No1_1', which is highlighted by an orange box and a callout box stating 'Option Value should be No1 and not No1_1'. The 'Option Value' field has a dropdown menu with 'No1_1' selected. The 'Field Options' panel also includes checkboxes for 'Selected' and 'Required', and buttons for 'Edit More Field Properties', 'Clone Field', and 'Delete Field'.

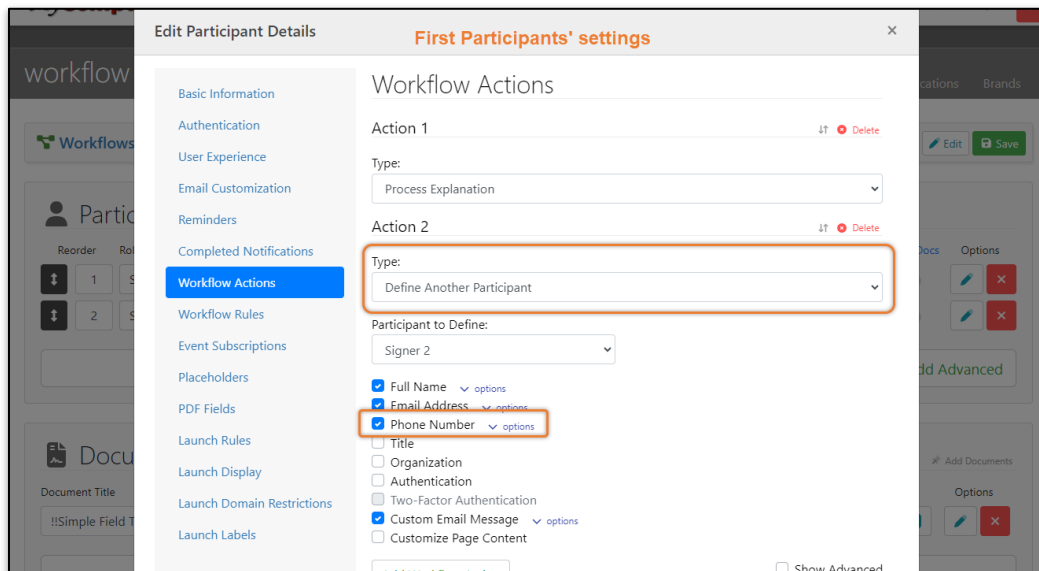
• **[PEP-7283] ~WorkflowActions**

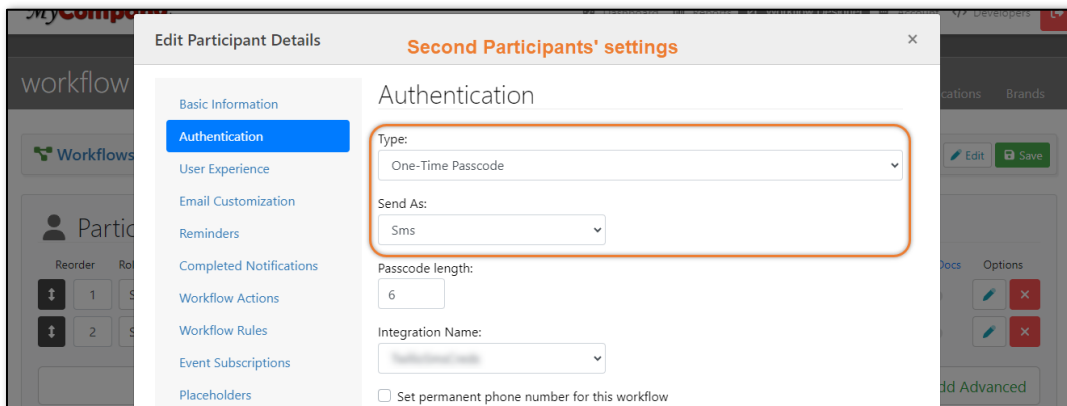
Fixed issue where Task Workflow Actions would be incorrectly skipped under certain conditions. The condition was if more than one document was included in the transaction and the task on the first document had a Workflow Action. Please see the settings referenced in the image below.



• [PEP-7279] ~Authentication ~WorkflowActions

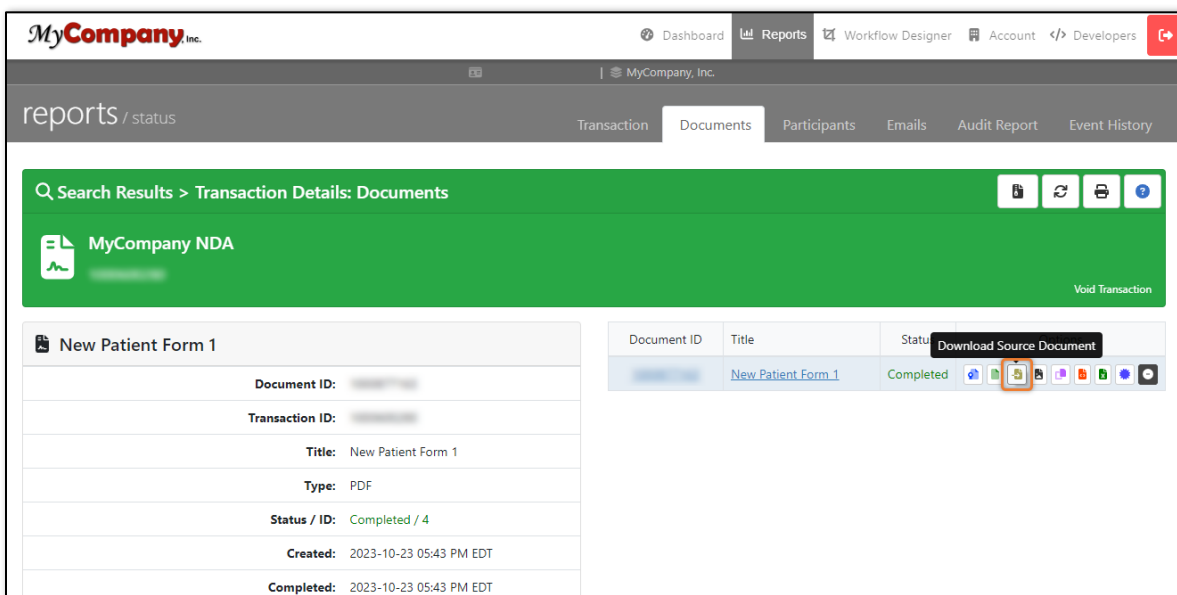
Fixed issue where when defining a participant's phone number for mobile authentication, the phone number entered would not be properly saved. Please see the settings referenced in the images below.





• [PEP-7261] ~Documents ~Transactions

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] ~Forms ~UI/UX ~WorkflowActions

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.

MyCompany Workflow Designer

Workflows > MyCompany NDA

Document Setup

Document Title: New Patient Form 1

File Name: New_Patient_Form_1.pdf

Is Upload: ☐

Manage Tasks: [Tag Document](#)

Options: [Add Documents](#)

✓ Add Document(s)

Tasks Editor

Signer 1

Enable DocForms

New Patient Form 1

Task Placement

Signature

Initials

Approval

Delivery

Carbon Copy

DocForms Field Placement

Textbox

Checkbox

Radio Buttons

Task Options

Task Type: Signature

Label:

Actual field name in final PDF: 79e750b4-37c0-43af-c1af-7b8889daea76

Participant: Signer 1

Application Type: Font-Stamped (Default)

Optional: ☐

Edit More Task Properties

Clone Task

Delete Task

Edit Task Details

Workflow Actions

Action 1

Type: -- Select Action Type --

Add Workflow Action

Show Advanced: ☐

Update Task

MyCompany Workflow Designer

Tasks Editor

Signer 1

Enable DocForms

New Patient Form 1

Task Placement

Signature

Initials

Approval

Delivery

Carbon Copy

DocForms Field Placement

Textbox

Checkbox

Radio Buttons

Task Options

Task Type: Signature

Label:

Actual field name in final PDF: 79e750b4-37c0-43af-c1af-7b8889daea76

Participant: Signer 1

Application Type: Font-Stamped (Default)

Optional: ☐

Edit More Task Properties

Clone Task

Delete Task

Edit Participant Details

Basic Information

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Placeholders

PDF Fields

User Experience

Brand: None (Use Default Branding)

Content Set: None (Use Default Content Set)

Notification Set: None (Use Default Notification Set)

Notification Language: None (Use Default Language)

Document/Task Status Page: Off

- **[PEP-7250] ~WorkflowActions**

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.

The screenshot shows the 'Tasks Editor' window. On the left, the 'Task Placement' sidebar lists tasks: Signature, Initials, Approval, Delivery (highlighted with an orange box), Carbon Copy (highlighted with an orange box), and DocForms Field Placement. Below this sidebar is a message: 'One or more Participants must be Form Fillers in order to add/edit Form Fields in your document.' The main area shows a 'New Patient Form' with fields for Date, Full Name, Phone, Date of Birth, Gender, Email, Address, City, State, Zip, and Insurance. The right sidebar shows a 'Task List' with 'Delivery' task highlighted.

- **[PEP-7144] ~ControlPanel ~Workflows**

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.

The screenshot shows the 'Edit Workflow Details' dialog box. The 'Launch Rules' tab is selected. The 'Enable Bulk Launching' checkbox is checked and highlighted with an orange box. Below the dialog, the 'Bulk Launch' section of the 'MyCompany NDA' workflow is visible. It includes a 'Download Sample CSV' button and a table with columns: Column, Name, Type, and Required.

Column	Name	Type	Required
A	Signer 1 FullName	Participant	Yes
B	Signer 1 EmailAddress	Participant	Yes
C ...	(field name here)	Document	No

- [PEP-6750] ~Forms ~Signing ~UI/UX

Fixed issue where DocForms were intermittently being skipped on a particular workflow.

- [PEP-5183] ~ControlPanel ~WorkflowActions

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

Important Notes:

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.

Bug Fixes

- [PEP-7375] ~Forms

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.

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

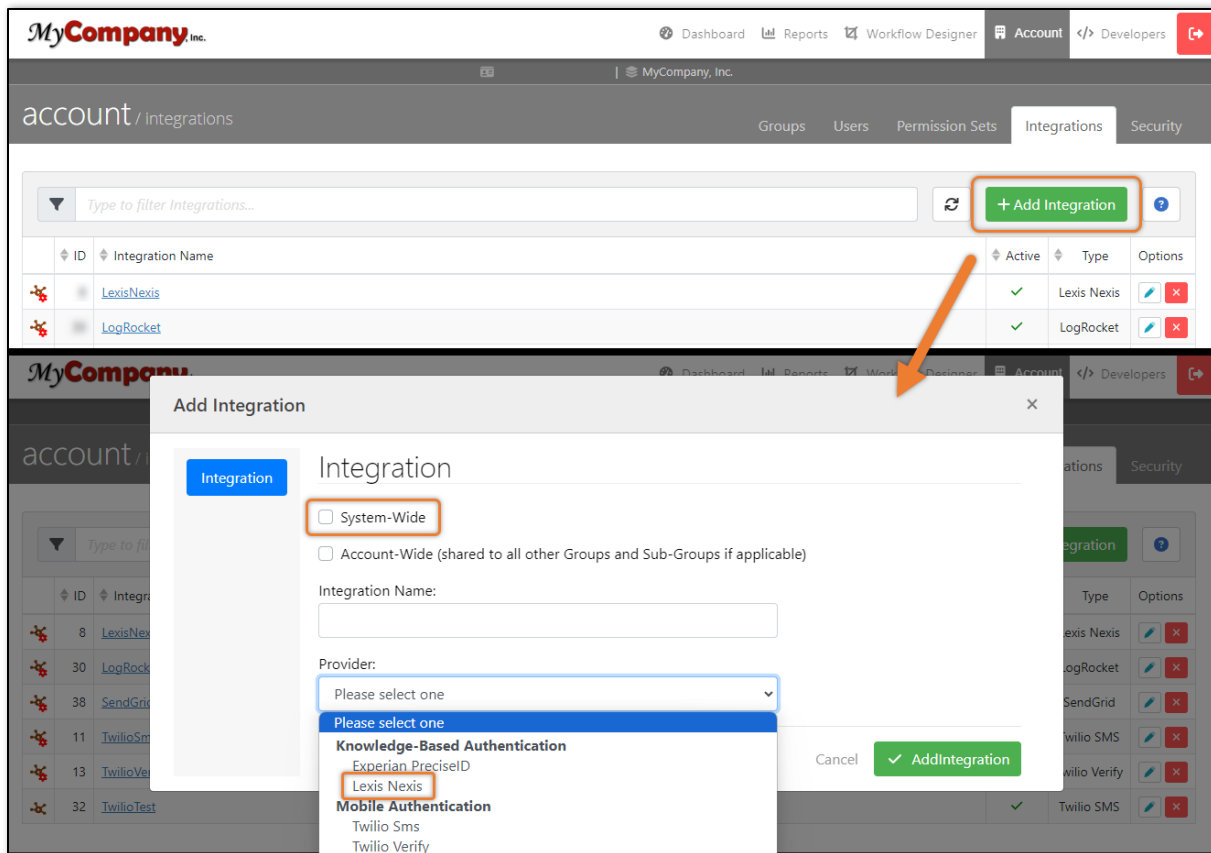
v5.17.7.1 Release

Release Date: 10/18/2023

Bug Fixes

- [PEP-7346] ~Authentication ~Groups ~Integrations ~UI/UX

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.



v5.17.7 Release

Release Date: 10/5/2023

Bug Fixes

- [PEP-7238] ~ControlPanel ~UI/UX ~Workflows

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

Edit Workflow Details

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.
- ☒ **Enable Bulk Launching**

Workflow Templates > Bulk Launch

MyCompany NDA

STEP 1: Below is the legend for how the Bulk Launch File spreadsheet should be completed. Click the button below to download a sample CSV file and fill out the spreadsheet with the appropriate data in each column for your bulk launch.

[Download Sample CSV](#)

Column	Name	Type	Required
A	Signer 1 FullName	Participant	Yes
B	Signer 1 EmailAddress	Participant	Yes
C ...	[field name here]	Document	No

STEP 2: Once you have populated the CSV file with your launch data, upload it below, and click the blue 'Start Bulk Launch' button to start the bulk launch processing. You will receive an email as soon as the processing has begun.

Bulk Launch File

Upload CSV:

[Browse for file...](#)

[Start Bulk Launch](#)

- [PEP-7202] ~ControlPanel ~Workflows

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

workflow designer

Workflows Web Forms Documents Content Notifications Brands

Workflows > MyCompany NDA

Launch Test Export Edit Save

Edit Workflow Details

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

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.
- ☐ Enable Bulk Launching

workflow designer

Workflows Web Forms Documents Content Notifications Brands

Workflows > MyCompany NDA

Launch Test Export Edit Save

Participant Setup

Role	Full Name	Email Address	In-Person	Final Email	Include Docs	Options
Vendor Signer	Full Name entered at	Email Address entered at	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

+ Add Participant + Add Me + Add Advanced

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 Domain Restrictions

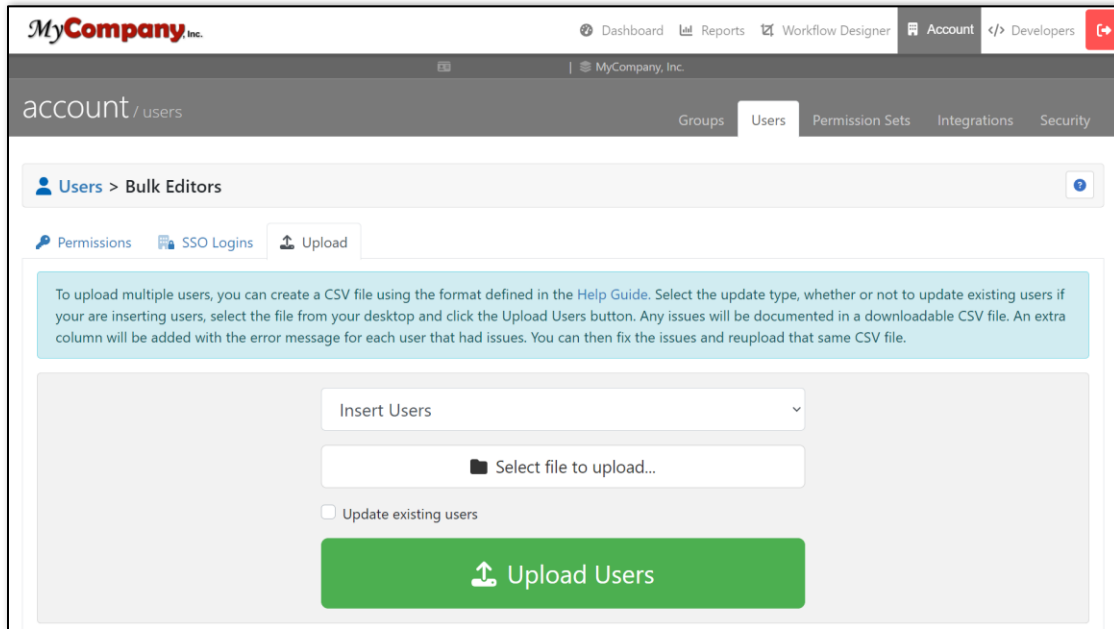
Email Domain 1

@ mydomain.com

Add Email Domain

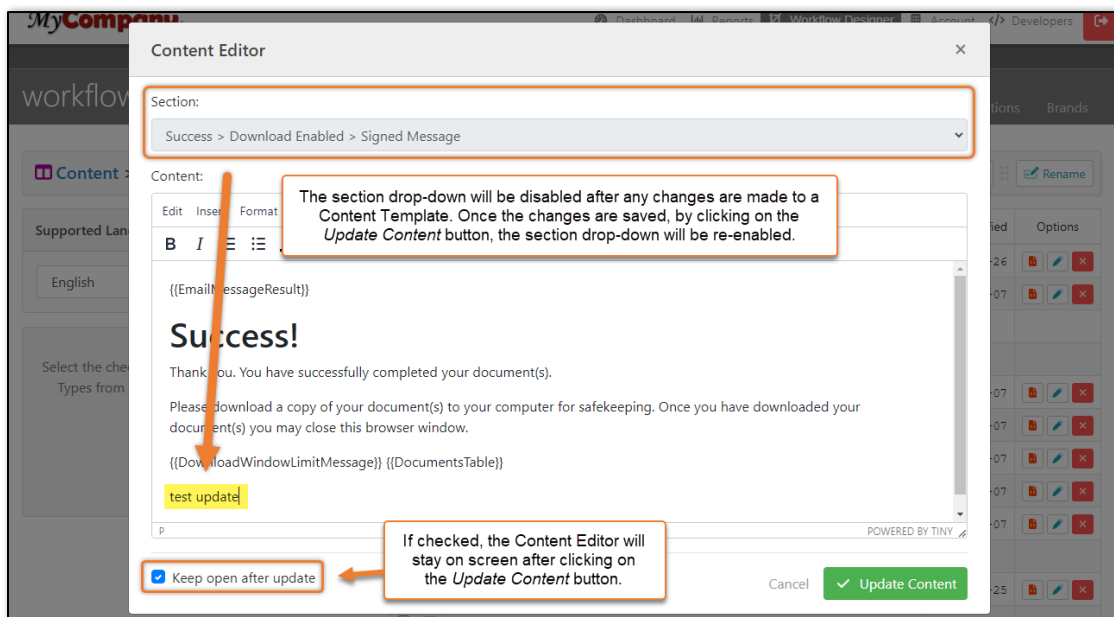
- [PEP-7111] ~ControlPanel ~Users

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.



- [PEP-6642] ~ContentSets ~ControlPanel ~UI/UX

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] ~Authentication ~SMS ~Workflows

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.

v5.17.6.2 Release**Release Date: 2/12/2024****Important Notes:**

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.

Bug Fixes

- **[PEP-7710]** ~Infrastructure

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****Important Notes:**

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.

Bug Fixes

- **[PEP-7375]** ~Forms

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.

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

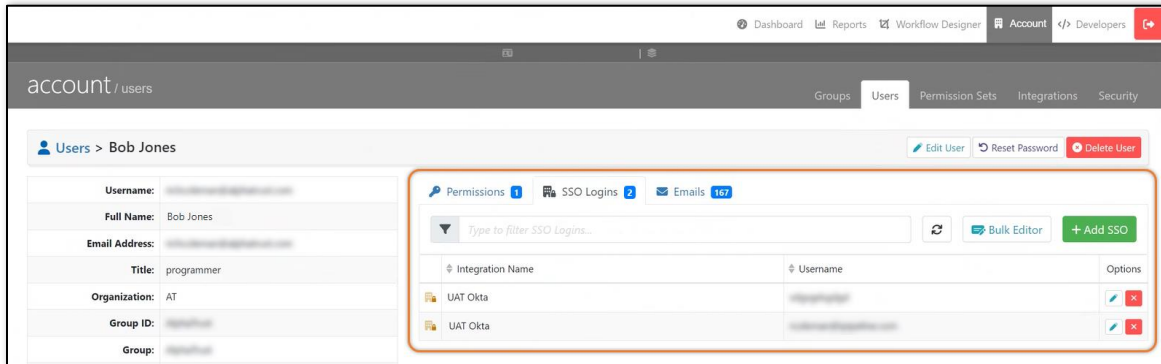
v5.17.6 Release

Release Date: 9/21/2023

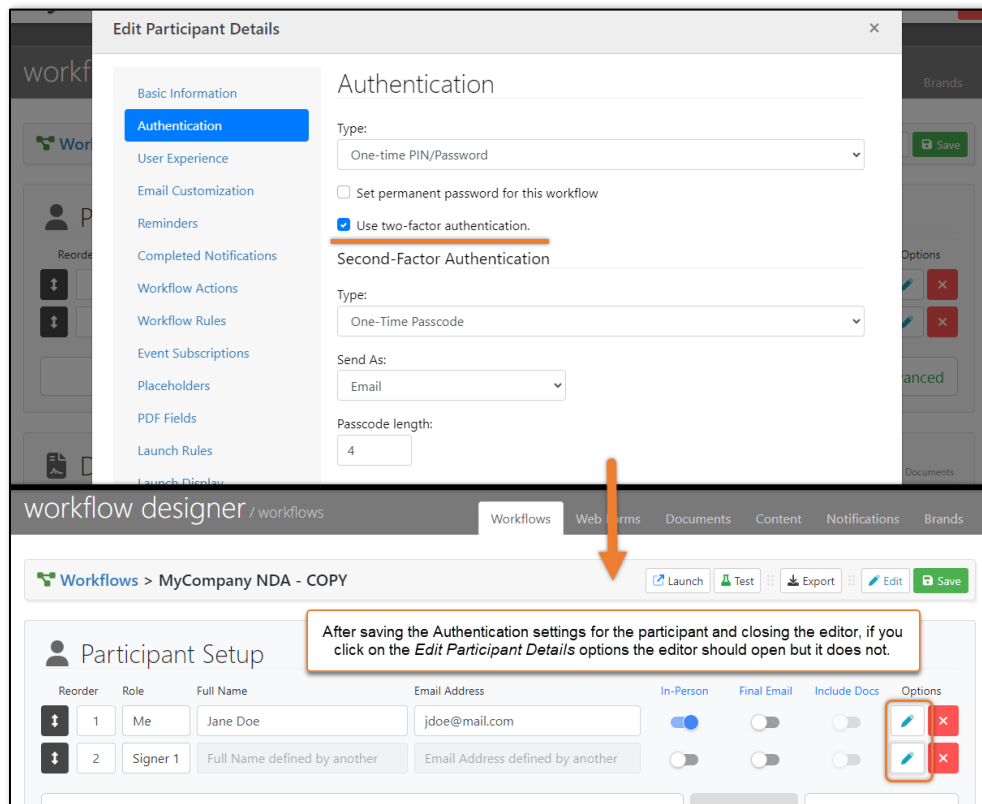
Bug Fixes

- [PEP-7230] ~ControlPanel ~Integrations ~Users

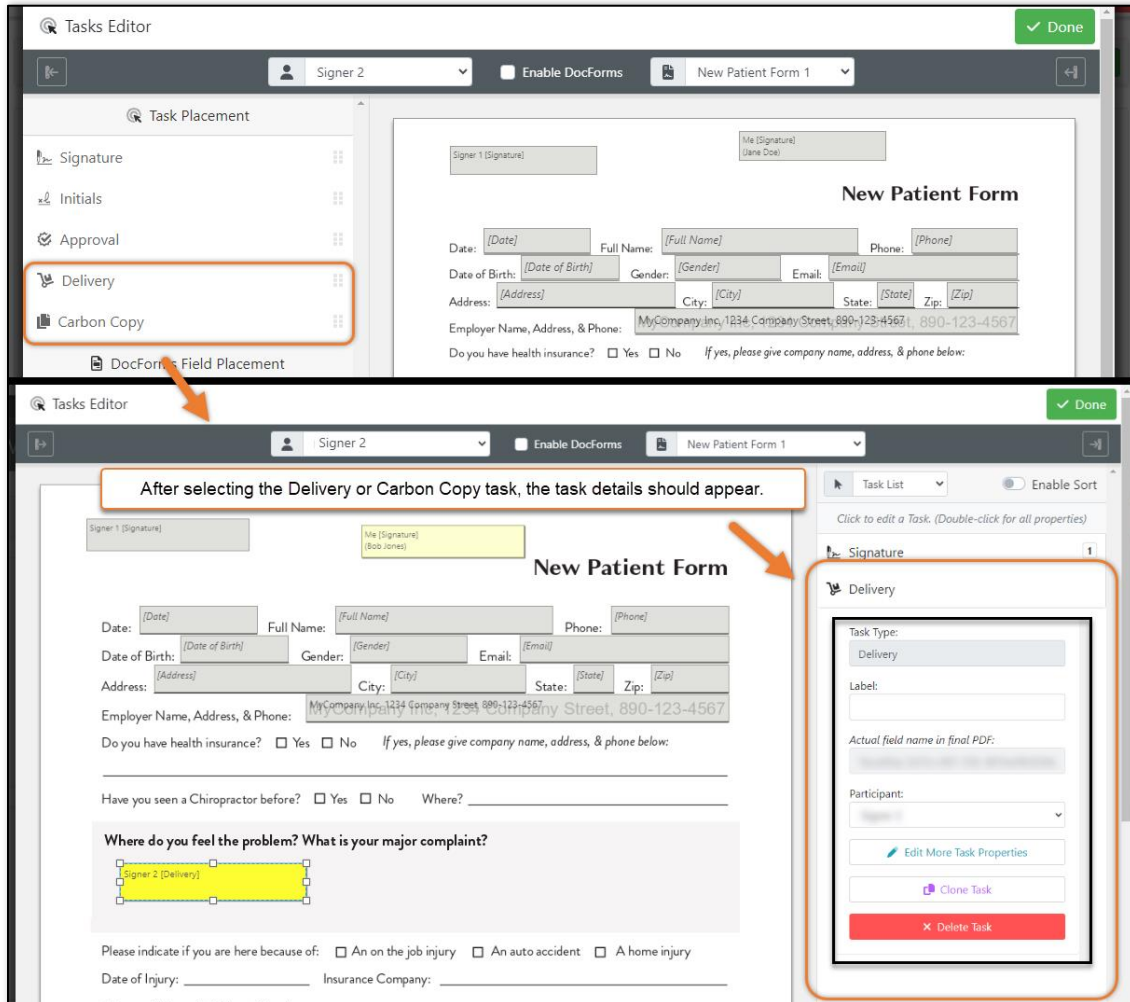
Fixed issue where if an SSO option was deleted from a user's profile, other SSO options would not load on a user's detail page. Please see the example image below for the SSO settings referenced.



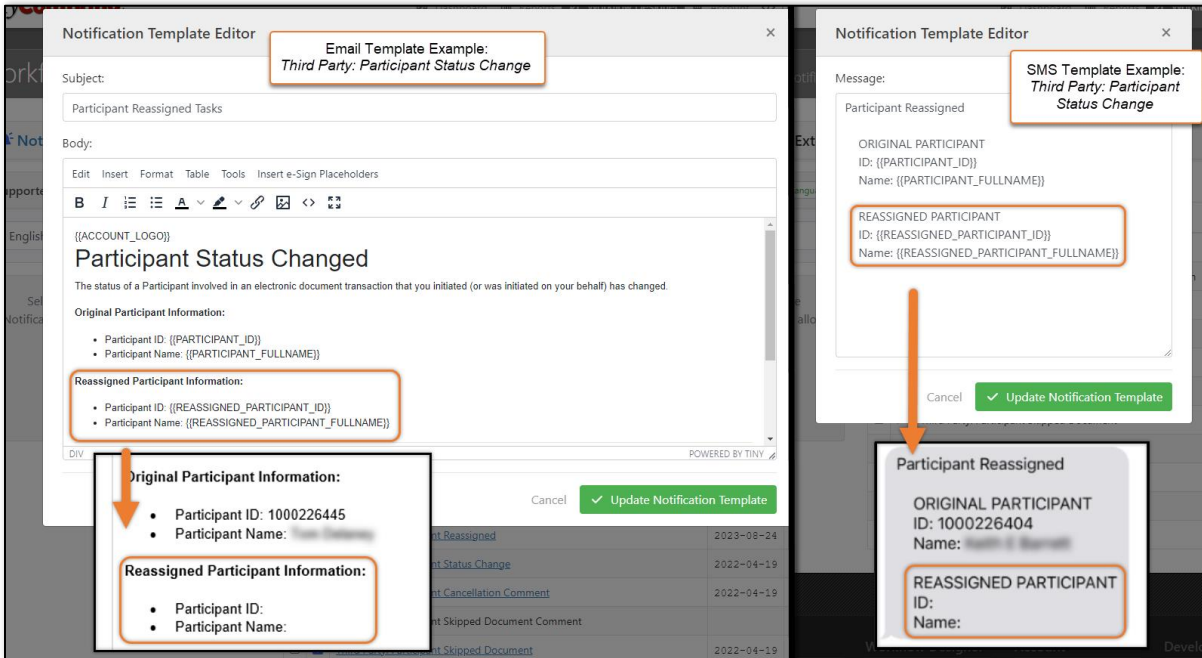
- **[PEP-7229]** ~API/WebServices
Fixed issue where an HTTP status code of 500 was occasionally returned when creating transactions under load.
- **[PEP-7213]** ~ControlPanel ~Workflows
Fixed issue where under certain authentication pairings the Edit Participant Details editor would not open after being set. Please see the image below for an example and the settings referenced.



- **[PEP-7211]** ~ControlPanel ~Documents ~UI/UX ~Workflows
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.

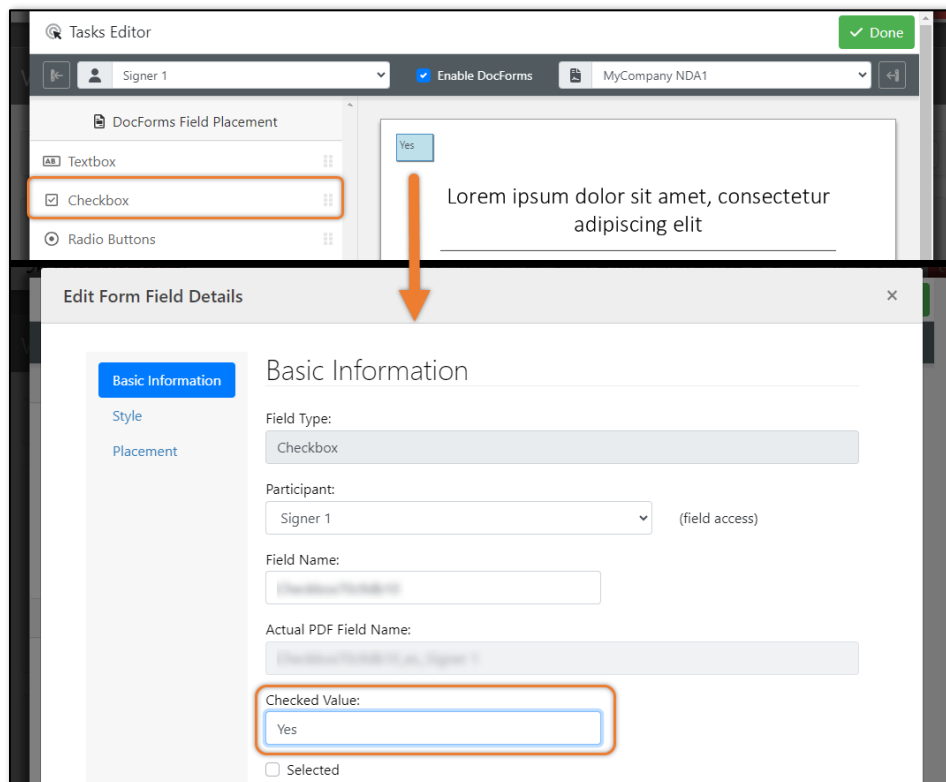


- **[PEP-7177] ~EventSubscriptions**
Fixed issue where the Reassigned Participant ID & Name are missing from SMS and Email Event Notifications. Please see the image below for the referenced settings.



• **[PEP-7170]** ~API/WebServices ~Documents ~Forms

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.



v5.17.5 Release

Release Date: 9/5/2023

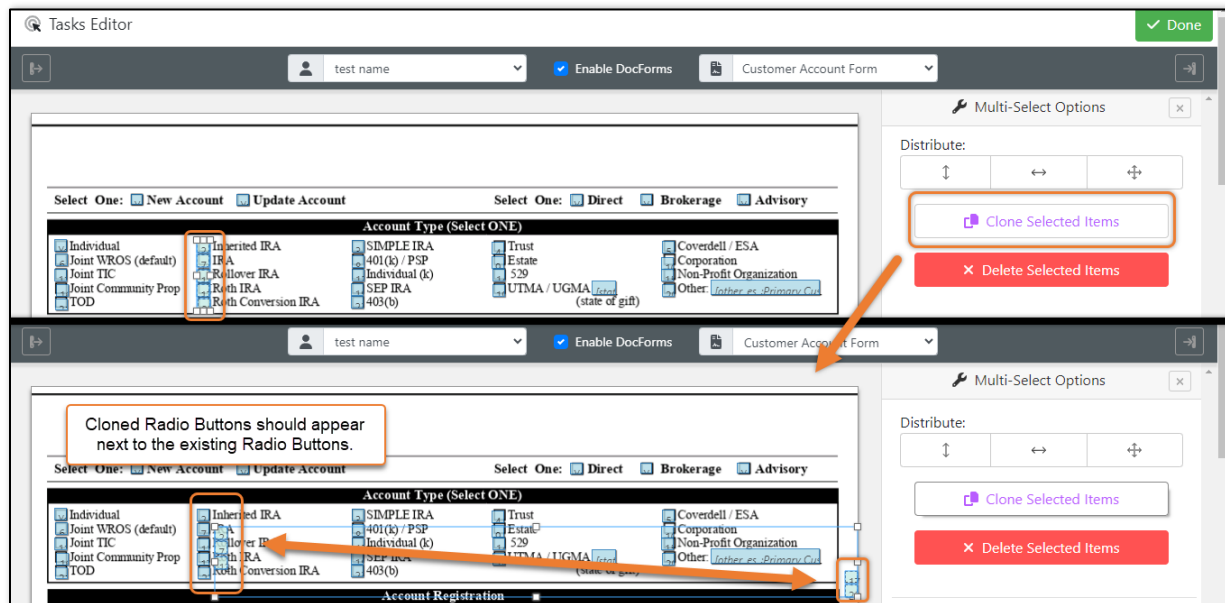
Bug Fixes

- [PEP-7192] ~API/WebServices ~Documents ~UI/UX

Fixed issue where PDF documents were not being merged properly.

- [PEP-7186] ~Forms

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



- [PEP-7180] ~API/WebServices ~Metadata ~Transactions ~Workflows

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.

Edit Participant Details

Basic Information
Authentication
User Experience
Email Customization
Reminders
Completed Notifications
Workflow Actions
Workflow Rules
Event Subscriptions
Placeholders
PDF Fields
Launch Rules

Workflow Rules

Custom Exit Url:

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

Verify/Query for:
☐ Full Name
☐ Email Address
☒ Title
☒ Organization

Document Access Window:
Leave Document available minutes after completed

Document Access Limit:
Allow participant to access times after completed

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.

Title:

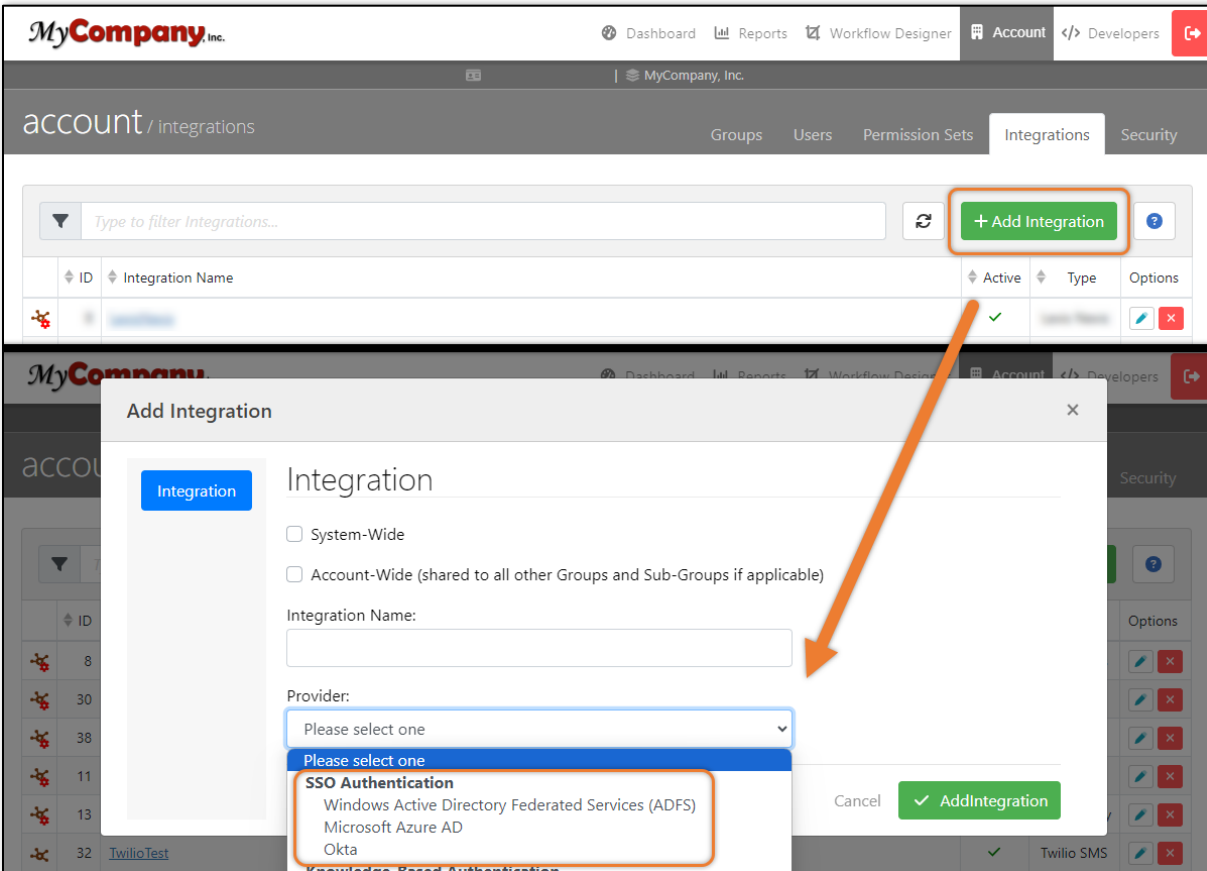
Organization:

Continue

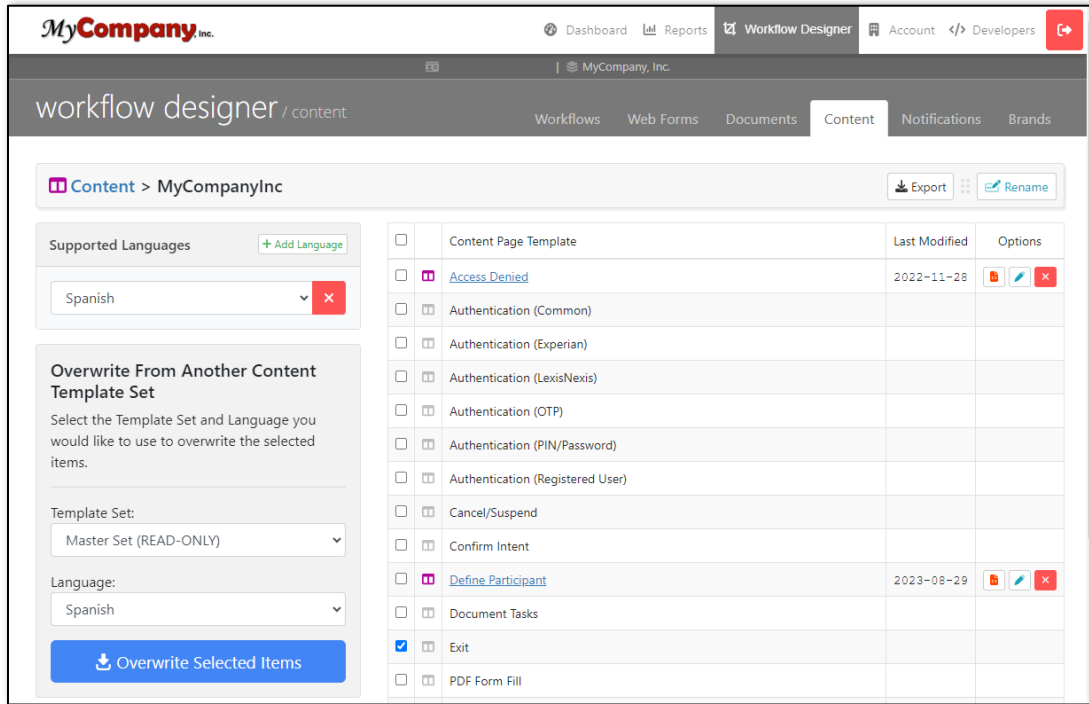
v5.17.4.0

- [PEP-7164] ~Integrations ~Logging

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.



- **[PEP-7138]** ~Workflows
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]** ~ContentSets ~ControlPanel ~UI/UX
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.



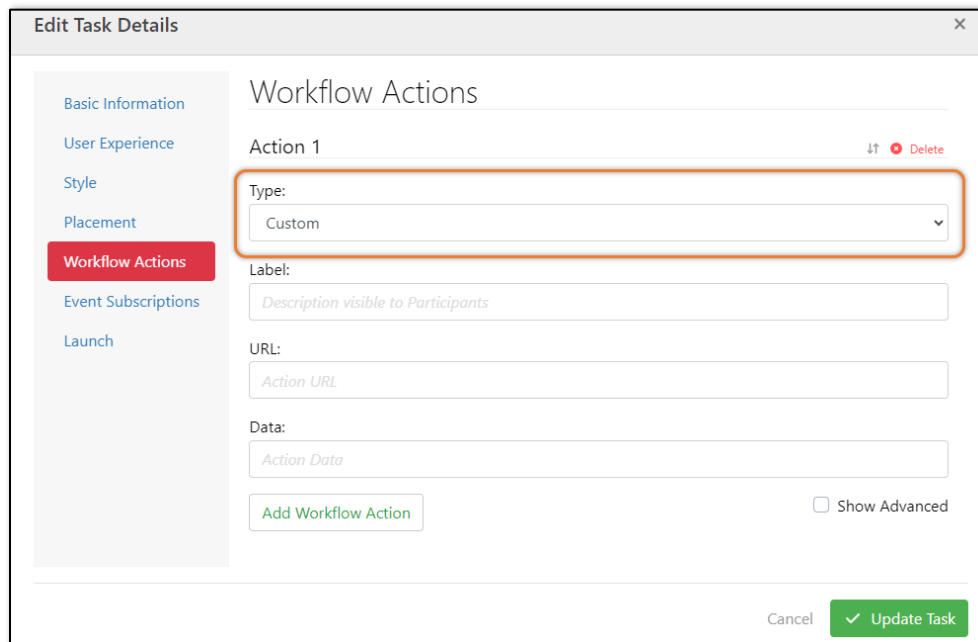
v5.17.4 Release

Release Date: 8/25/2023

Bug Fixes

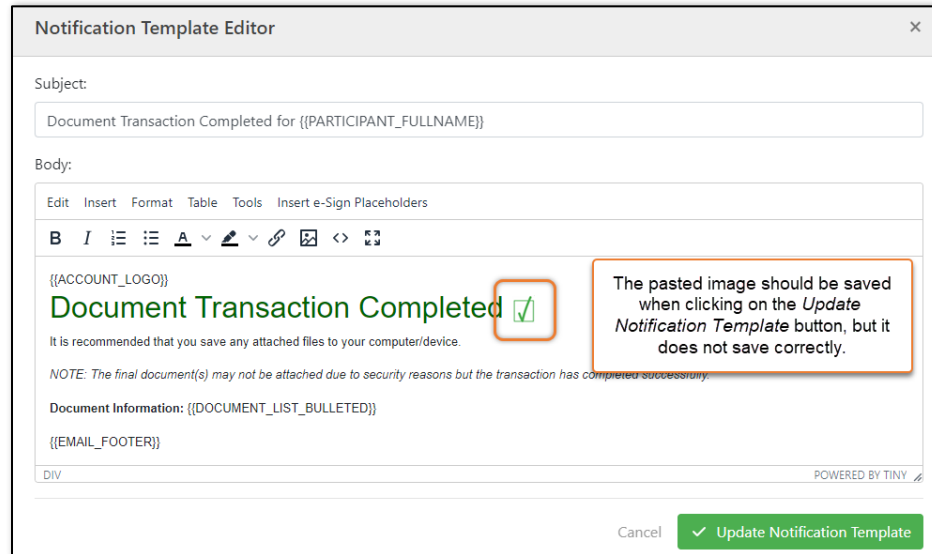
- **[PEP-7166]** ~Signing ~WorkflowActions

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.



- **[PEP-7141]** ~ContentSets ~Notifications ~UI/UX

Fixed issue 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.

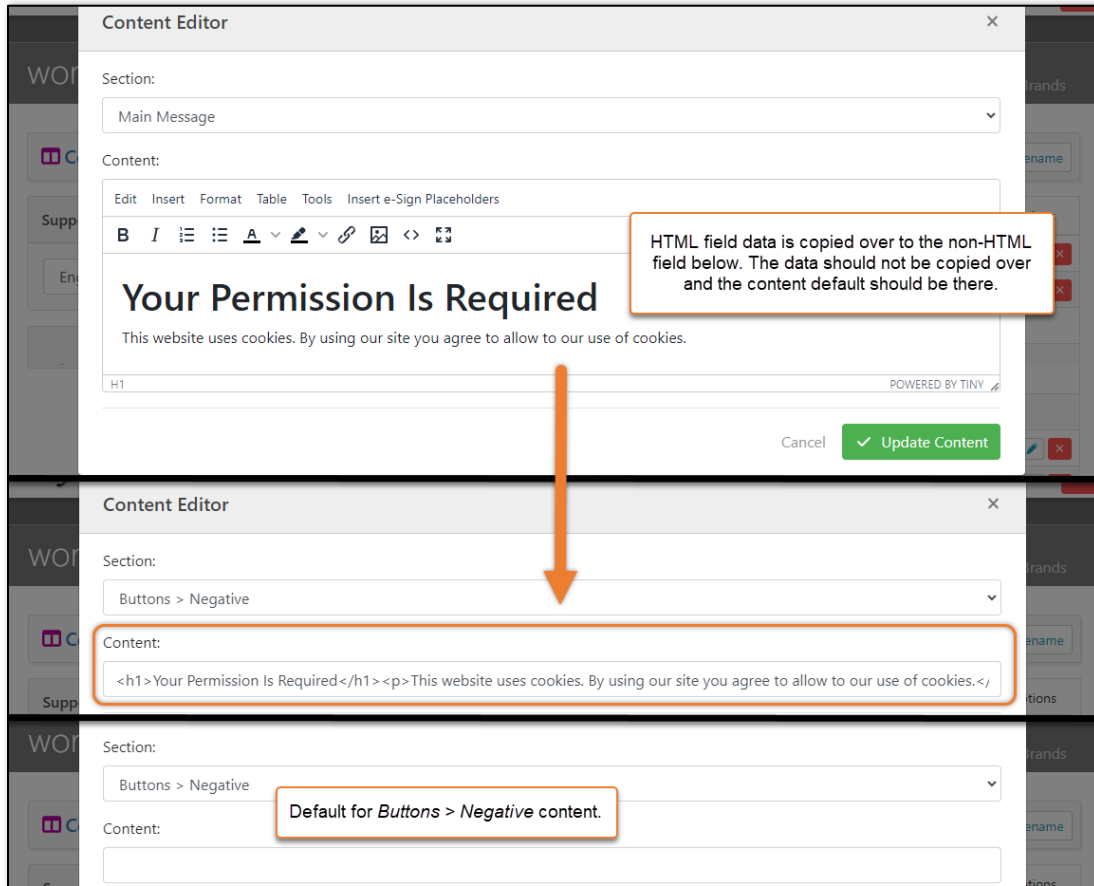


- **[PEP-7123]** ~Installer ~Signing

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.

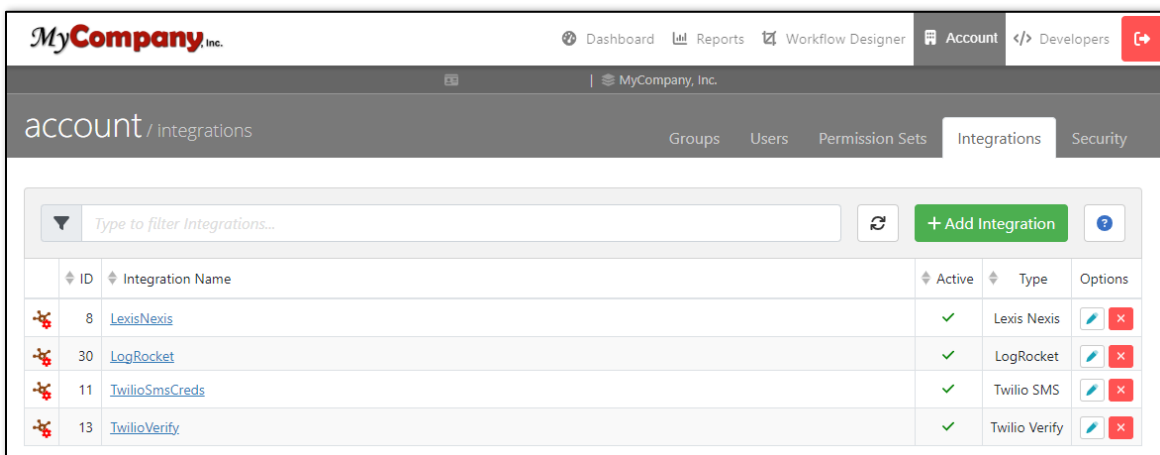
- **[PEP-7118]** ~ContentSets ~ControlPanel

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.



• [PEP-7106] ~Integrations ~UI/UX

Fixed issue where the Integrations tab would periodically fail to load. Please see the image below for the Integrations tab referenced.



• [PEP-7065] ~EventSubscriptions

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.

Edit Participant Details

Basic Information

Authentication

User Experience

Email Customization

Reminders

Completed Notifications

Workflow Actions

Workflow Rules

Event Subscriptions

Event Subscriptions

Subscription 1 Delete

Type:

Participant Reassigned

☒ Webhook
☐ Email
☐ SMS

URL:

Subscription Listener URL

Data:

Subscription Data

Edit Workflow Details

Basic Information

Expirations

Notifications

User Experience

Email Sender

Event Subscriptions

Metadata

Launch Display

Launch Rules

Launch Web Forms

Event Subscriptions

Subscription 1 Delete

Type:

Skipped Document Event

☒ Webhook
☐ Email
☐ SMS

URL:

Subscription Listener URL

Data:

Subscription Data

Add Event Subscription

☐ Show Advanced

Save as Preset

Cancel Update Workflow

- [PEP-6972] ~Authentication ~ControlPanel ~UI/UX ~Workflows

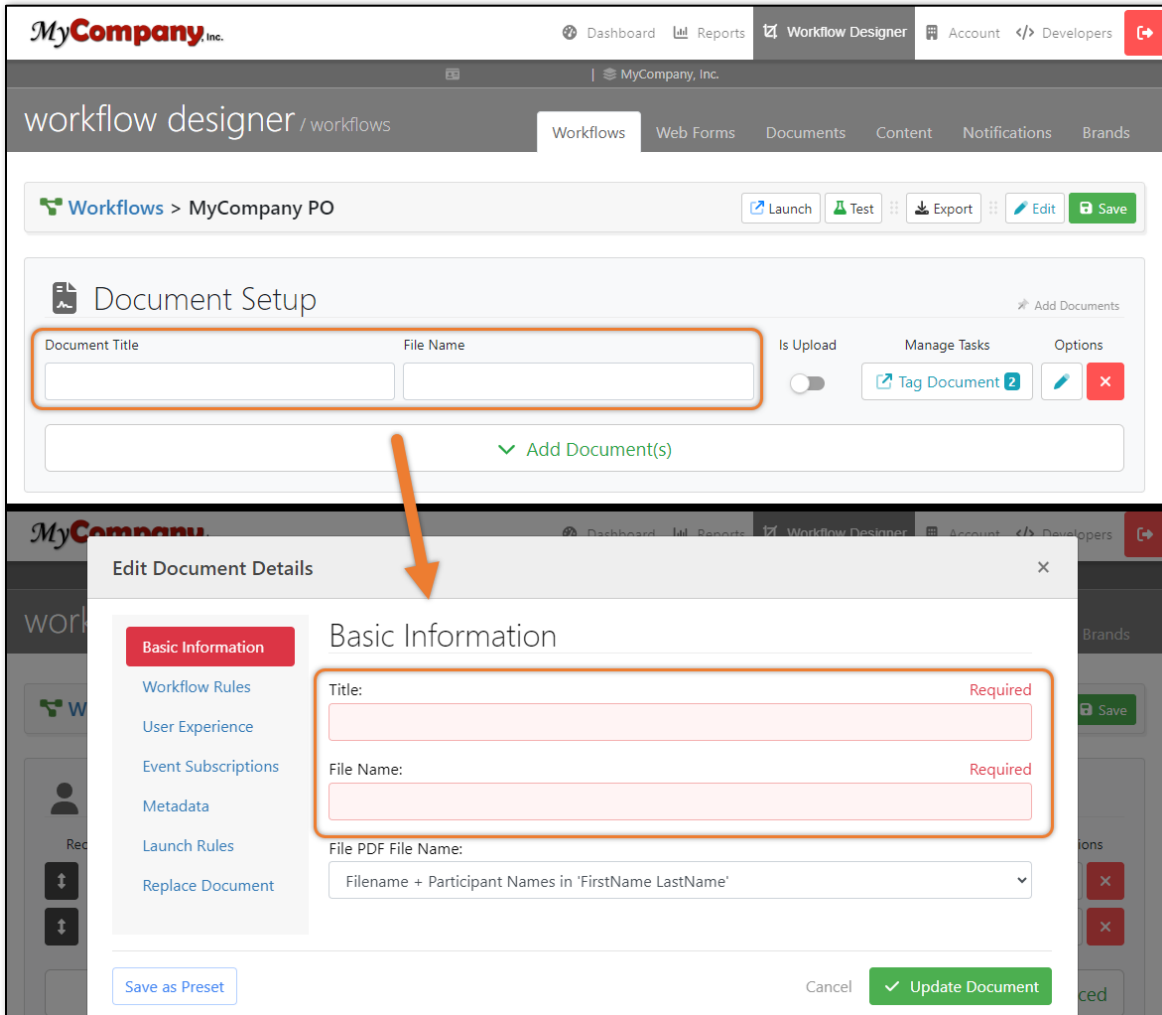
Fixed issue where when upgrading software versions, older Workflows utilizing One-Time Passcode (previously known as Mobile) would see the participant validation (*Send As*) not properly set in the UI. Please see the image below for additional details.

• [PEP-6524] ~Forms ~Documents ~Workflows

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.

• [PEP-6312] ~ControlPanel ~Documents ~UI/UX ~Workflows

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] ~API/WebServices ~Logging

Fixed issue where a misleading InvalidOperationException was thrown when async operations didn't finish correctly.

- [PEP-7084] ~Groups ~UI/UX

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.

- [PEP-7067] ~Reports ~UI/UX

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.

- [PEP-7029] ~ControlPanel ~UI/UX ~Workflows

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.

dashboard

Quick StatsWorkflow TemplatesPending Signatures

Workflow Templates > Launch

Bulk LaunchTest

MyCompany PO: 22062


PO Approver

Custom Email Message (optional):

EditInsertFormatTableTools

B*I*U

A



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POWERED BY TINY

Send Workflow

- 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.

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'.

- [PEP-6313] ~ControlPanel ~Metadata ~Workflows

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.