Legend

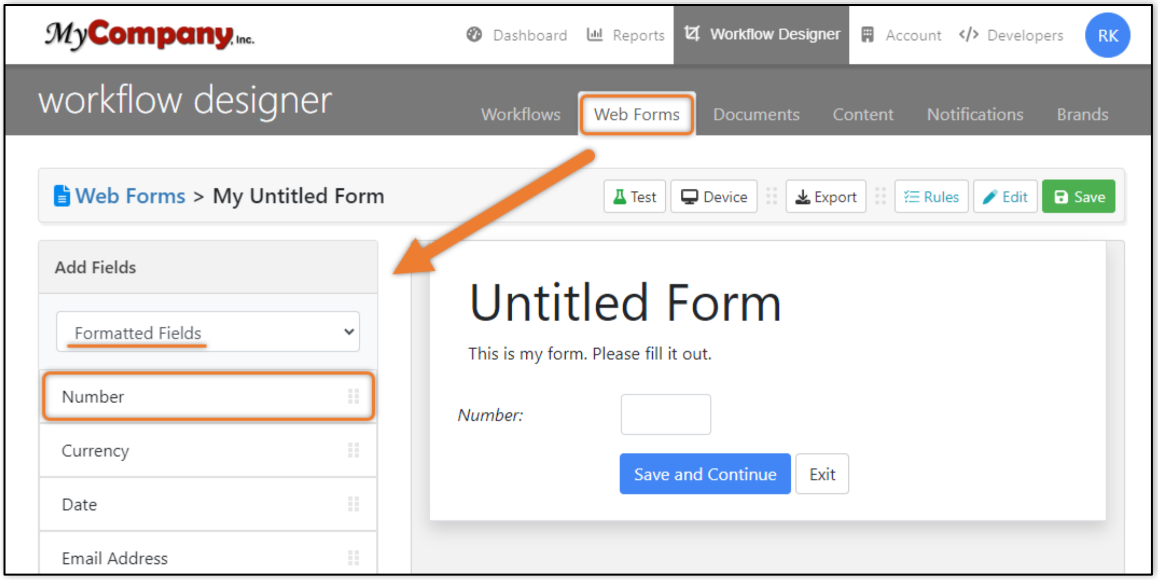
Tag	Description
~API/WebServices	Represents an update or change that impacts usage of the AlphaTrust API's
~Access/Permissions	Impacts a user's access and permissions to sections of AlphaTrust.
~AuditReport	Represents an update or change that impacts usage of the AlphaTrust Audit Report.
~Authentication	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.

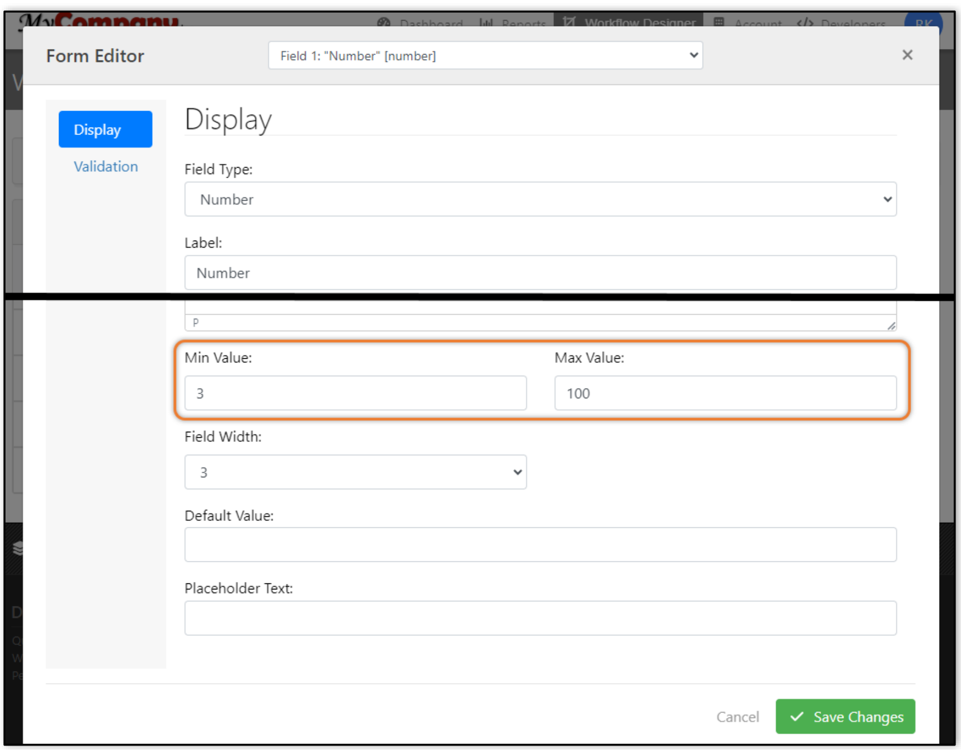
v5.18.13.1 Release ***Release Date: 8/30/2024***

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.



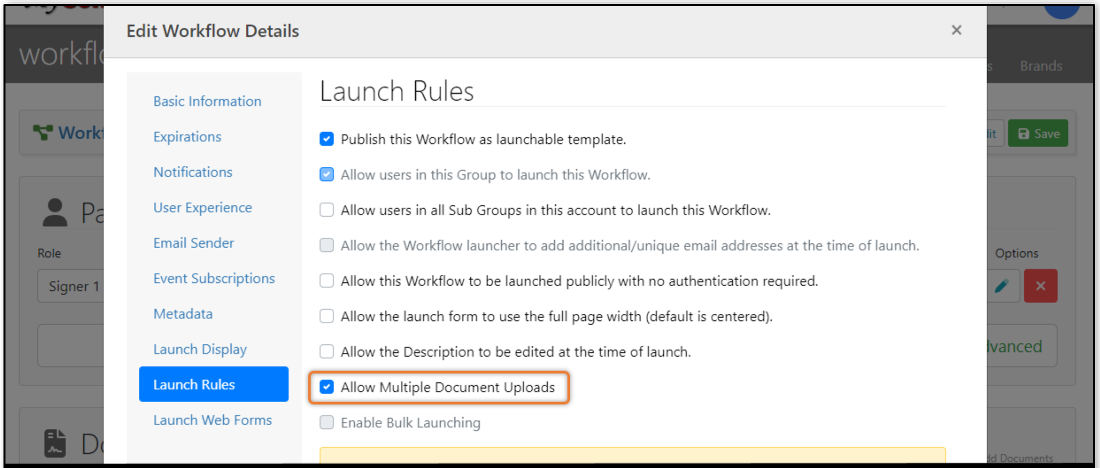


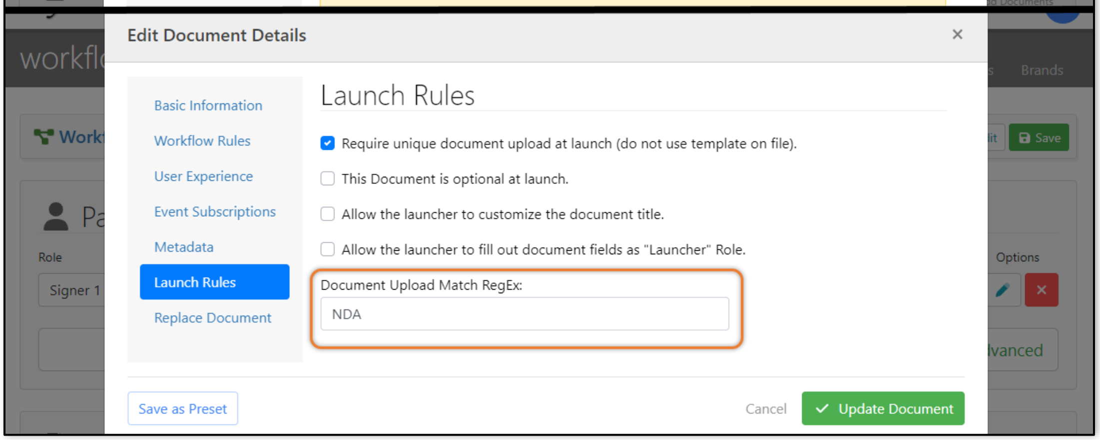
v5.18.13 Release *Release Date: 8/15/2024*

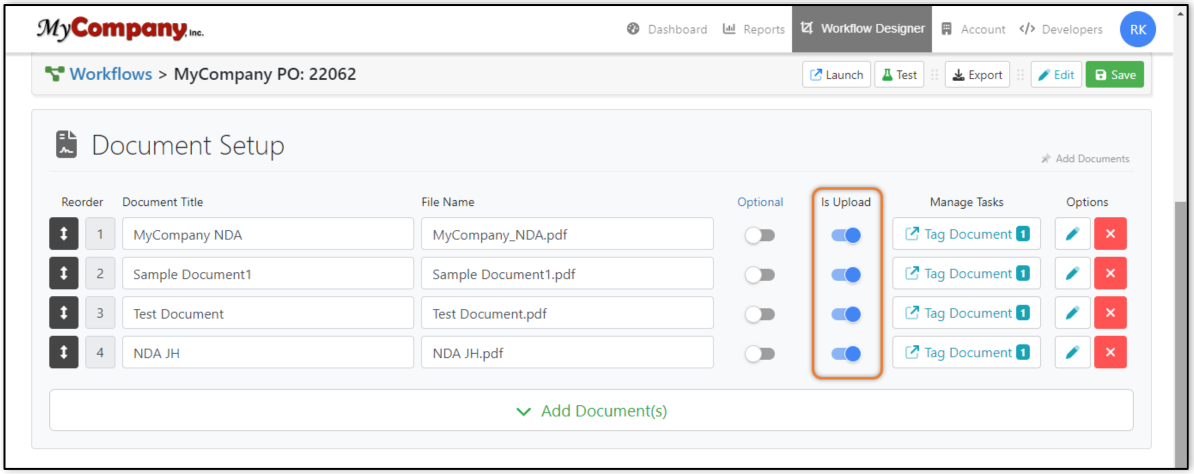
Bug Fixes

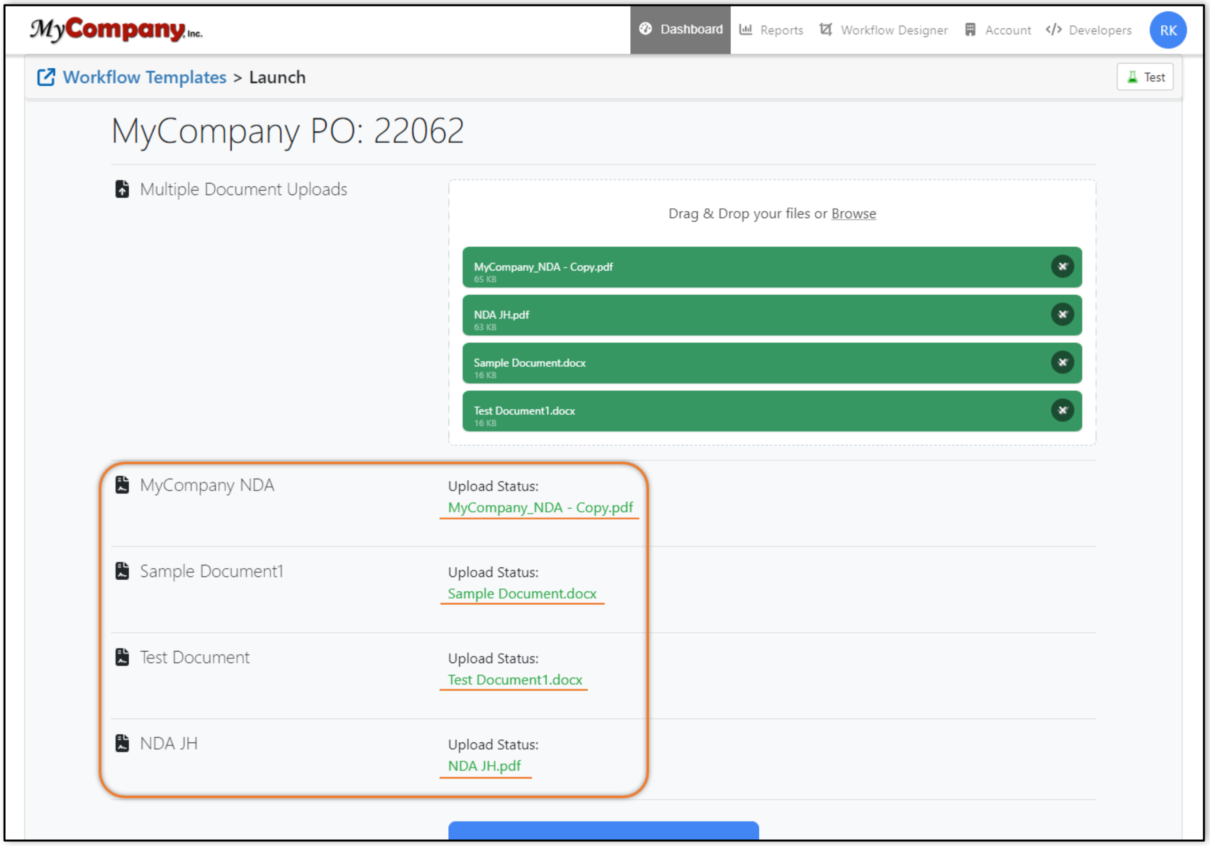
- **[PEP-8344]** ~ControlPanel ~UI/UX ~Workflows

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.



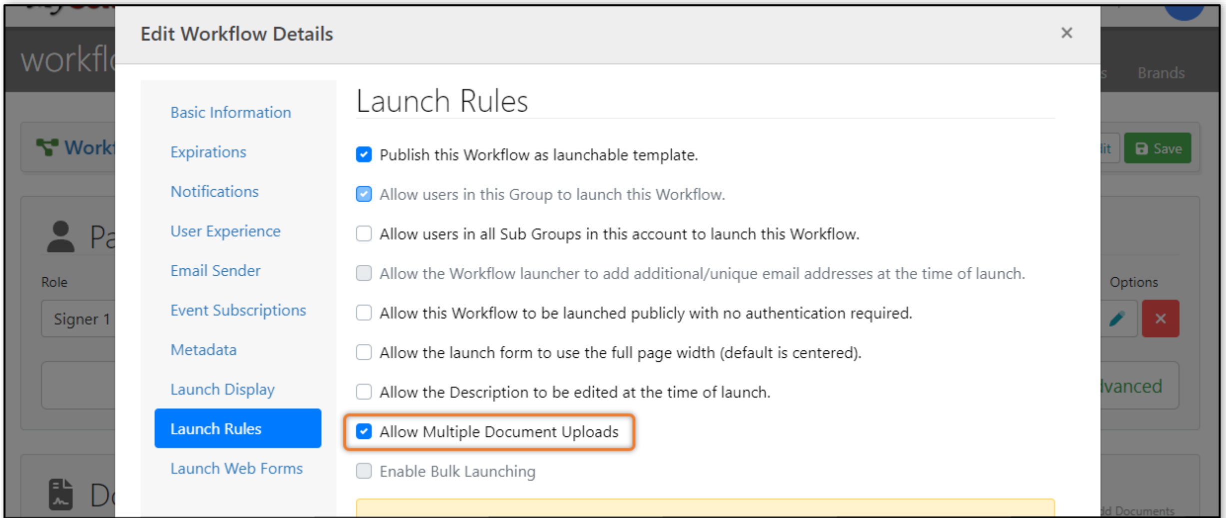


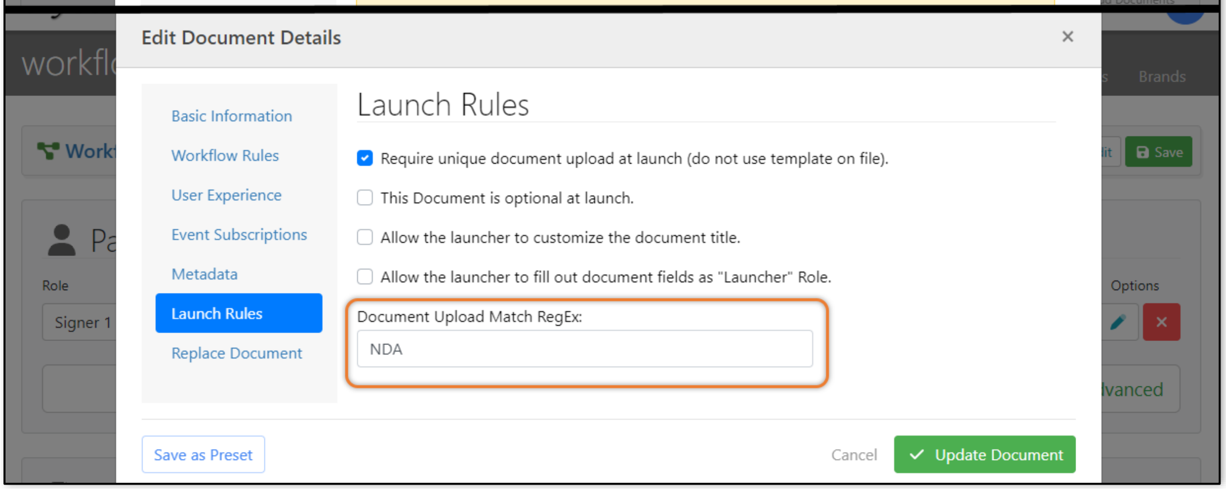


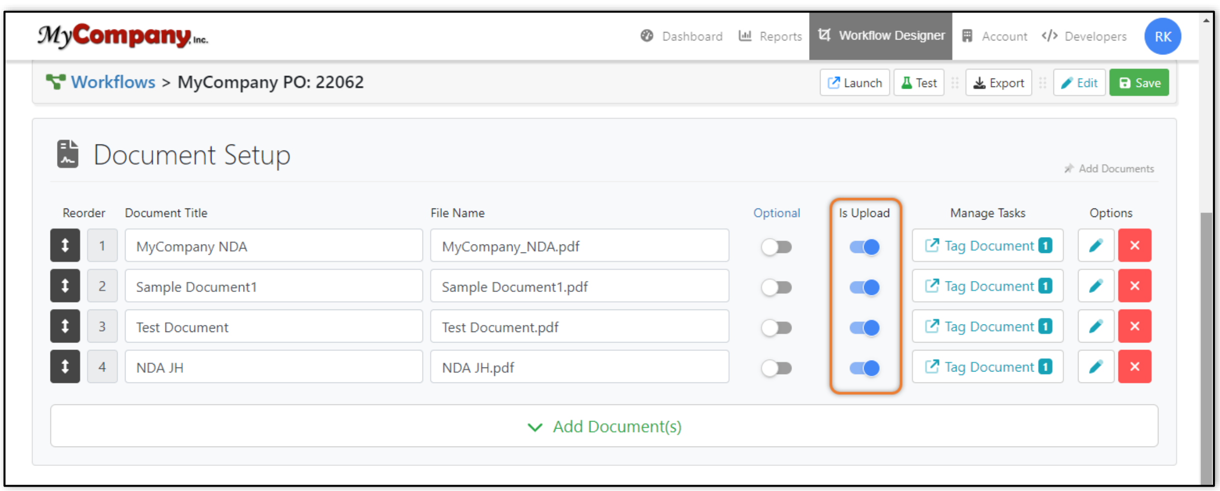


- **[PEP-8222]** ~ControlPanel ~UI/UX ~Workflows

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.

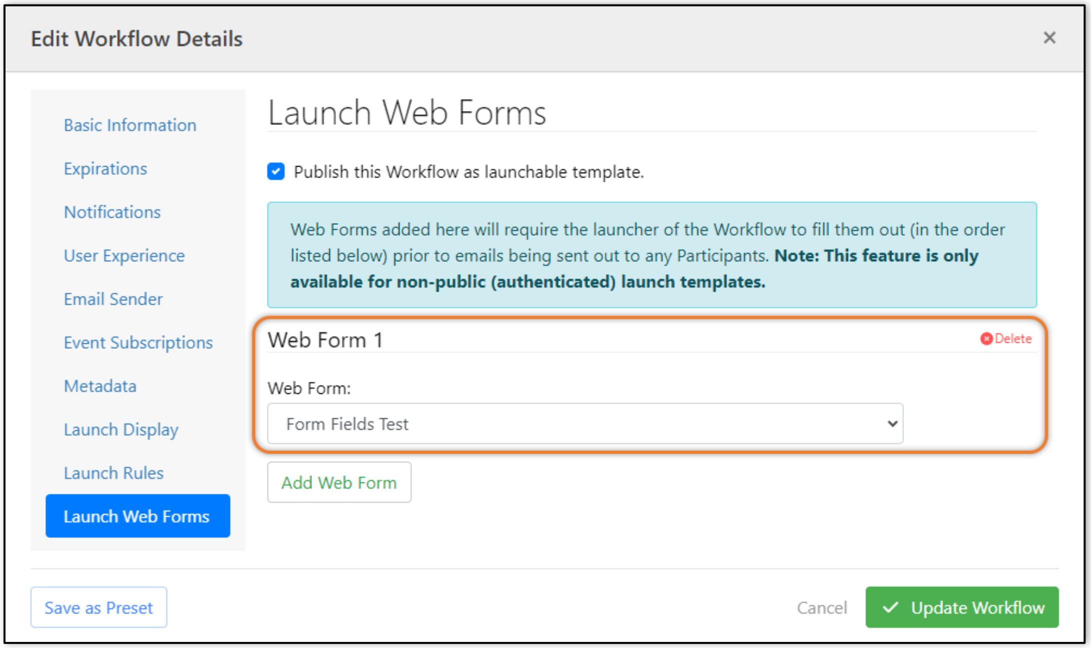

Edit Workflow Details
Basic Information
Expirations
Notifications
User Experience
Email Sender
Event Subscriptions
Metadata
Launch Display
Launch Rules
Launch Web Forms
Launch Rules
Publish this Workflow as launchable template.
Allow users in this Group to launch this Workflow.
Allow users in all Sub 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

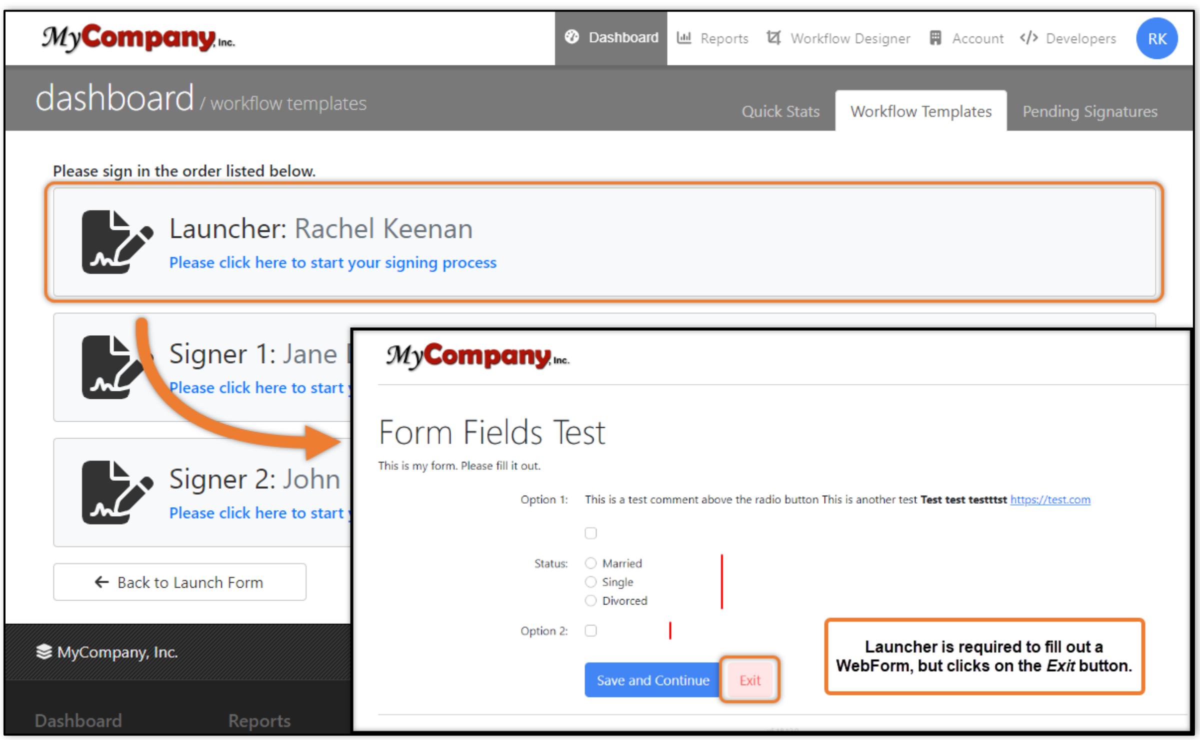

Edit Document Details
Basic Information
Workflow Rules
User Experience
Event Subscriptions
Metadata
Launch Rules
Replace Document
Launch Rules
Require unique document upload at launch (do not use template on file).
This Document is optional at launch.
Allow the launcher to customize the document title.
Allow the launcher to fill out document fields as "Launcher" Role.
Document Upload Match RegEx:
NDA
Save as Preset
Cancel
Update Document

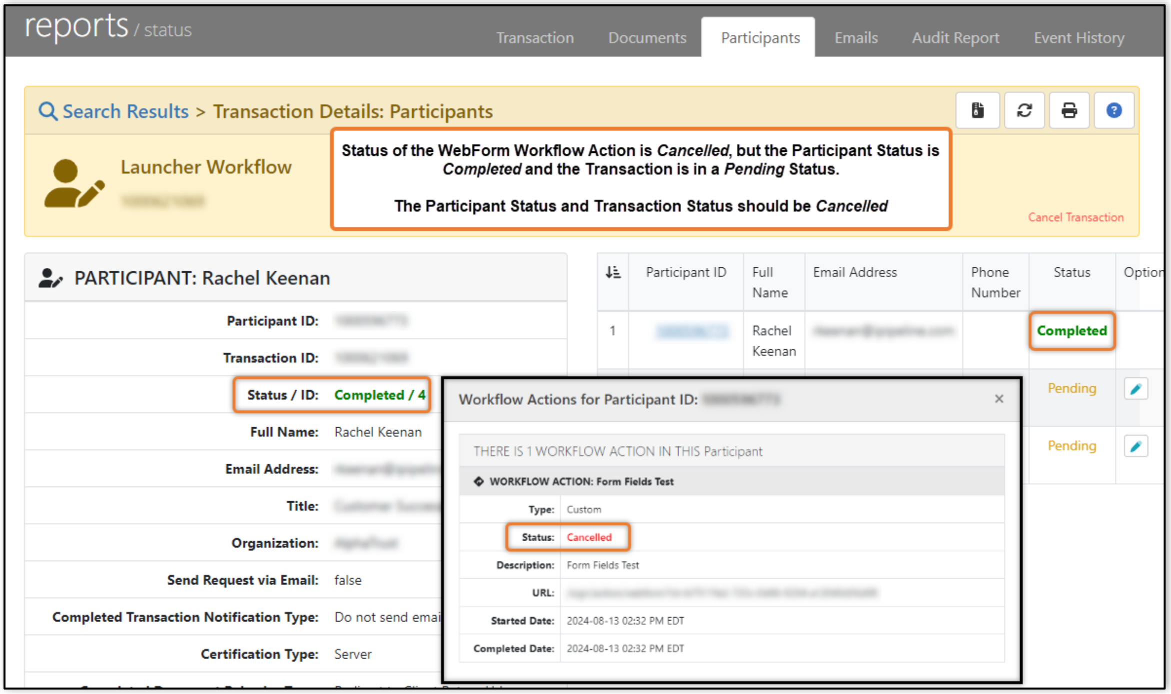

MyCompany Inc.
Dashboard
Reports
Workflow Designer
Account
Developers
RK
Workflows > MyCompany PO: 22062
Launch
Test
Export
Edit
Save
Document Setup
Add Documents
Reorder
Document Title
File Name
Optional
Is Upload
Manage Tasks
Options
1 MyCompany NDA MyCompany_NDA.pdf Tag Document
2 Sample Document1 Sample Document1.pdf Tag Document
3 Test Document Test Document.pdf Tag Document
4 NDA JH NDA JH.pdf Tag Document
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.





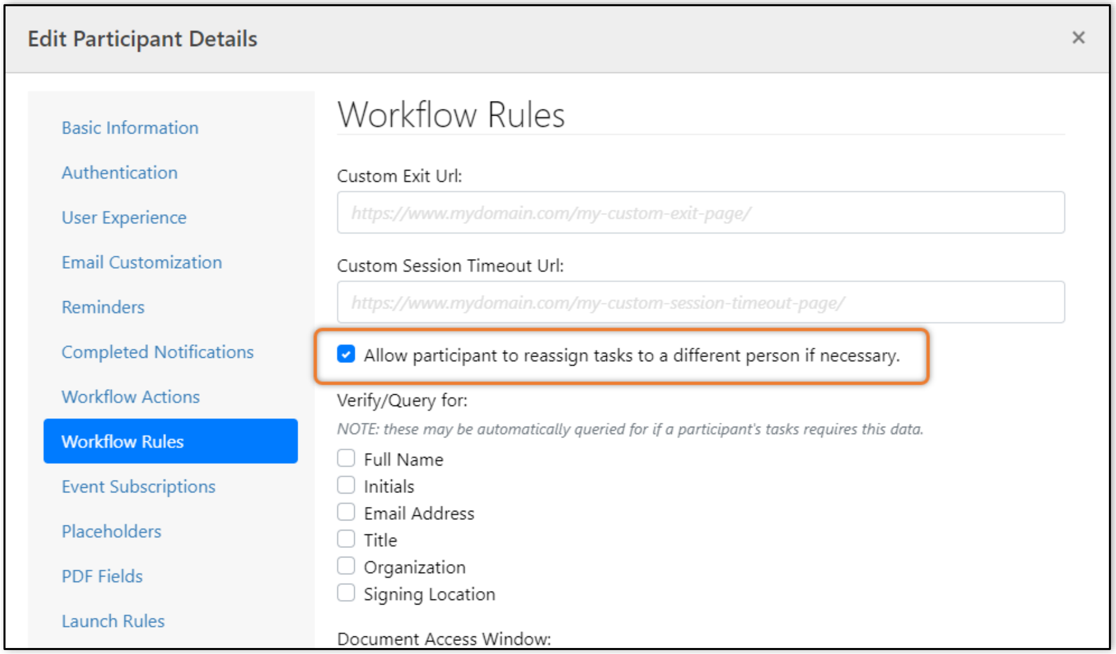


v5.18.12 Release *Release Date: 8/1/2024*

Bug Fixes

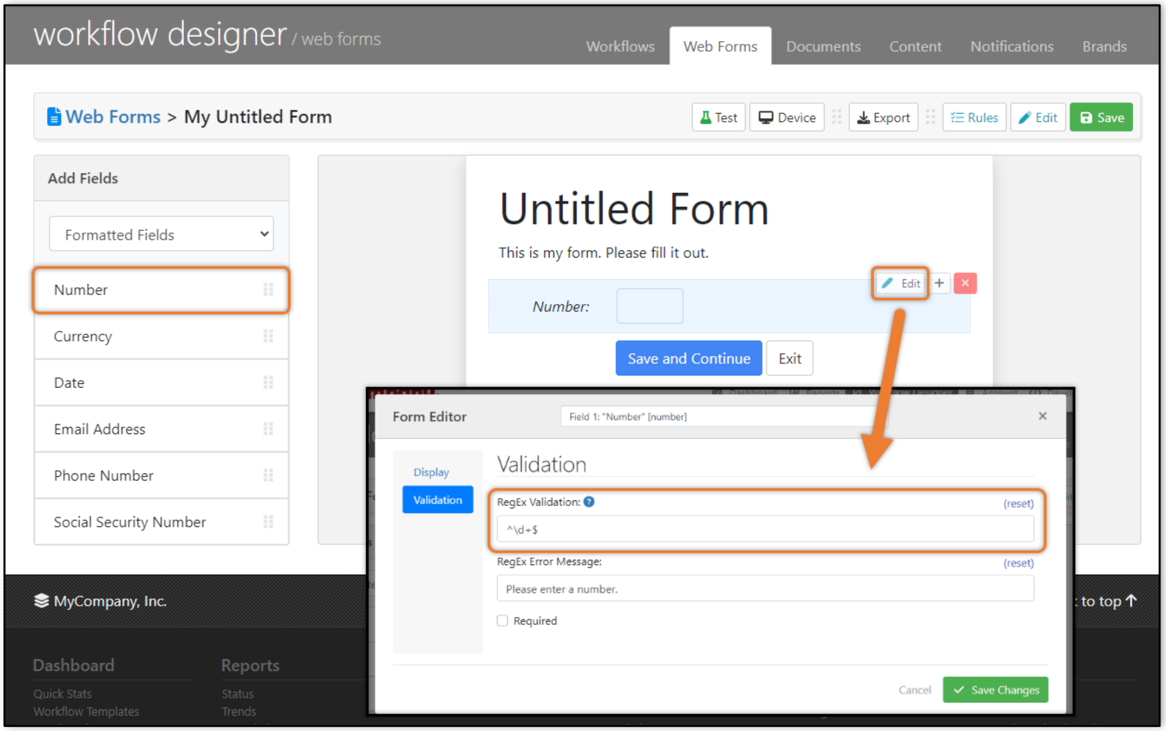
- **[PEP-8176]** ~ControlPanel ~Workflows

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



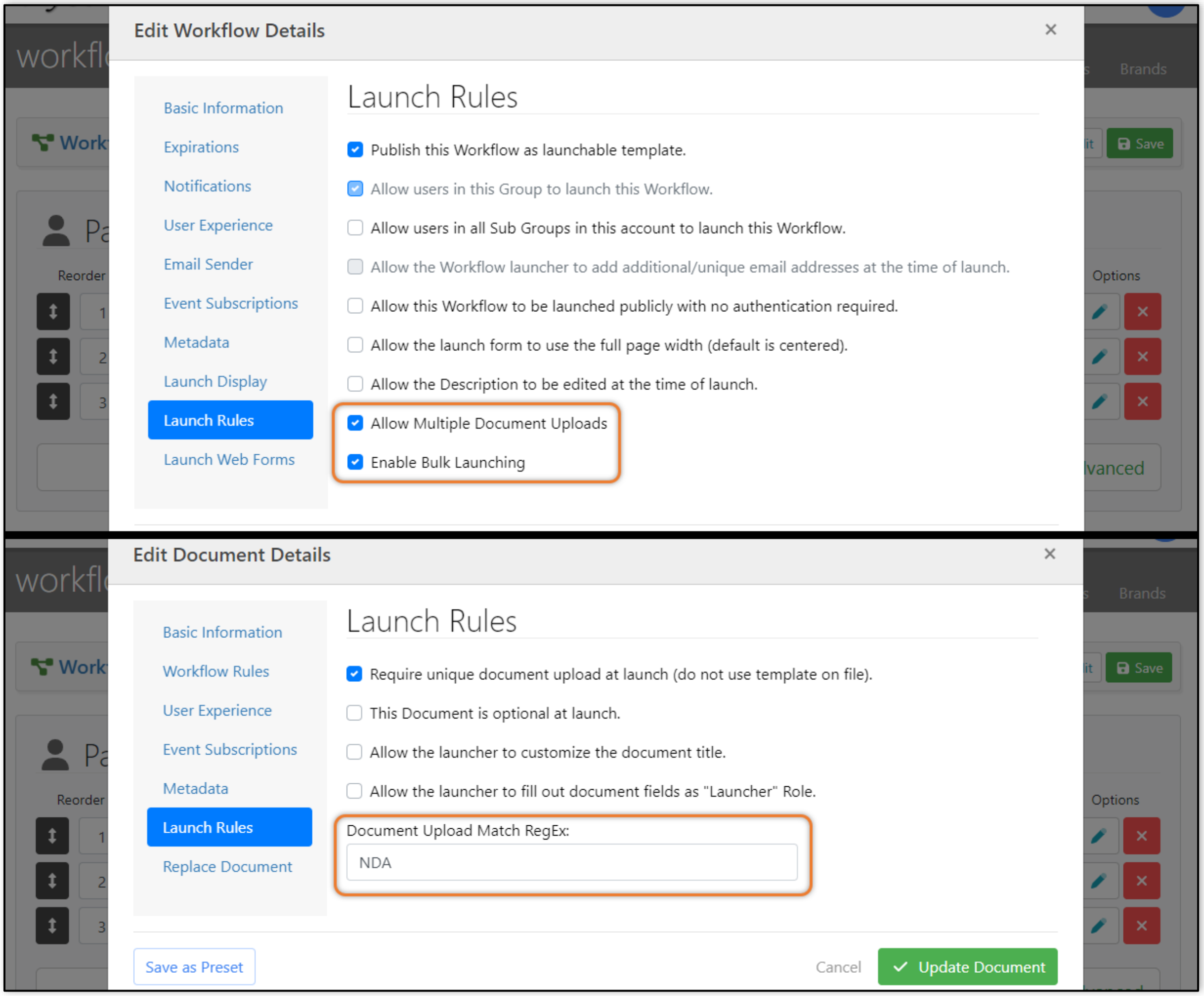
- **[PEP-8174]** ~ControlPanel ~Forms ~UI/UX

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



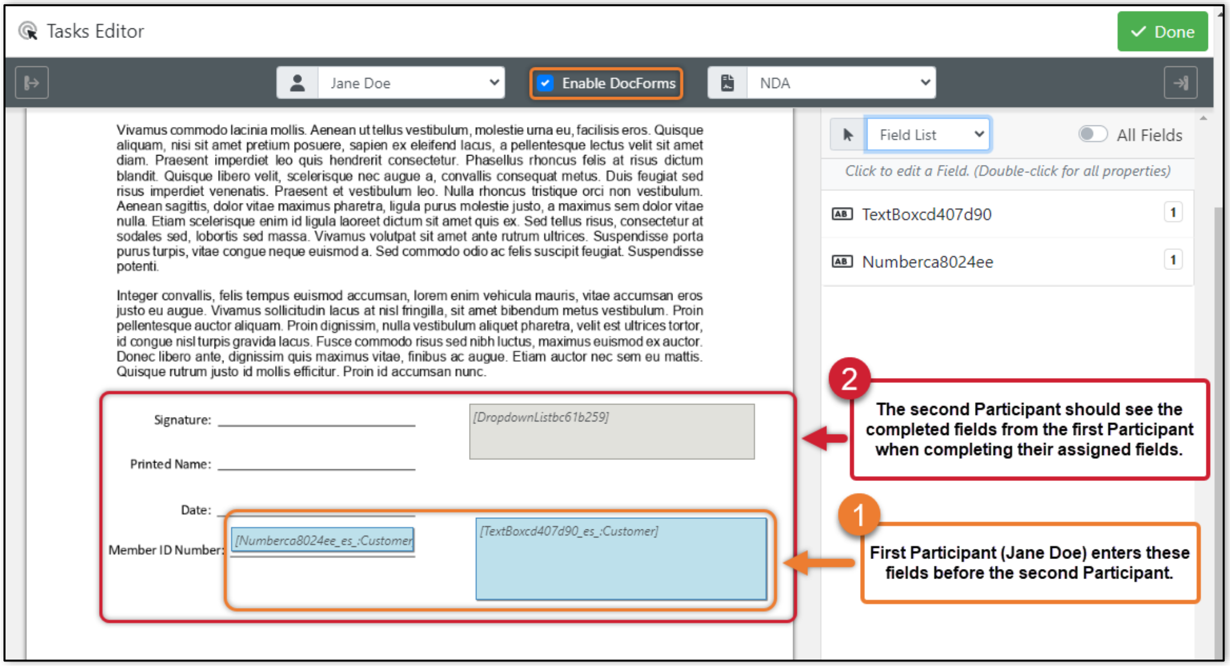
- **[PEP-8163]** ~ControlPanel ~UI/UX ~Workflows

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.



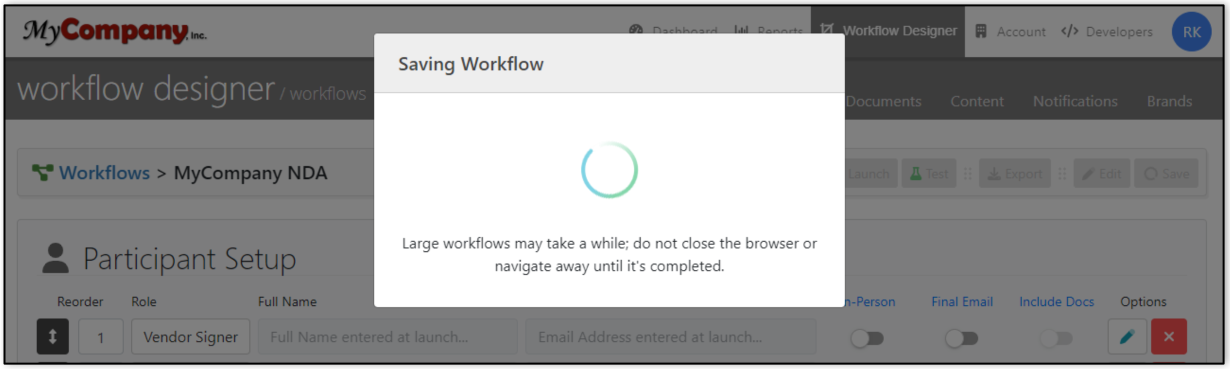
- **[PEP-8133]** ~Forms ~Workflows

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.



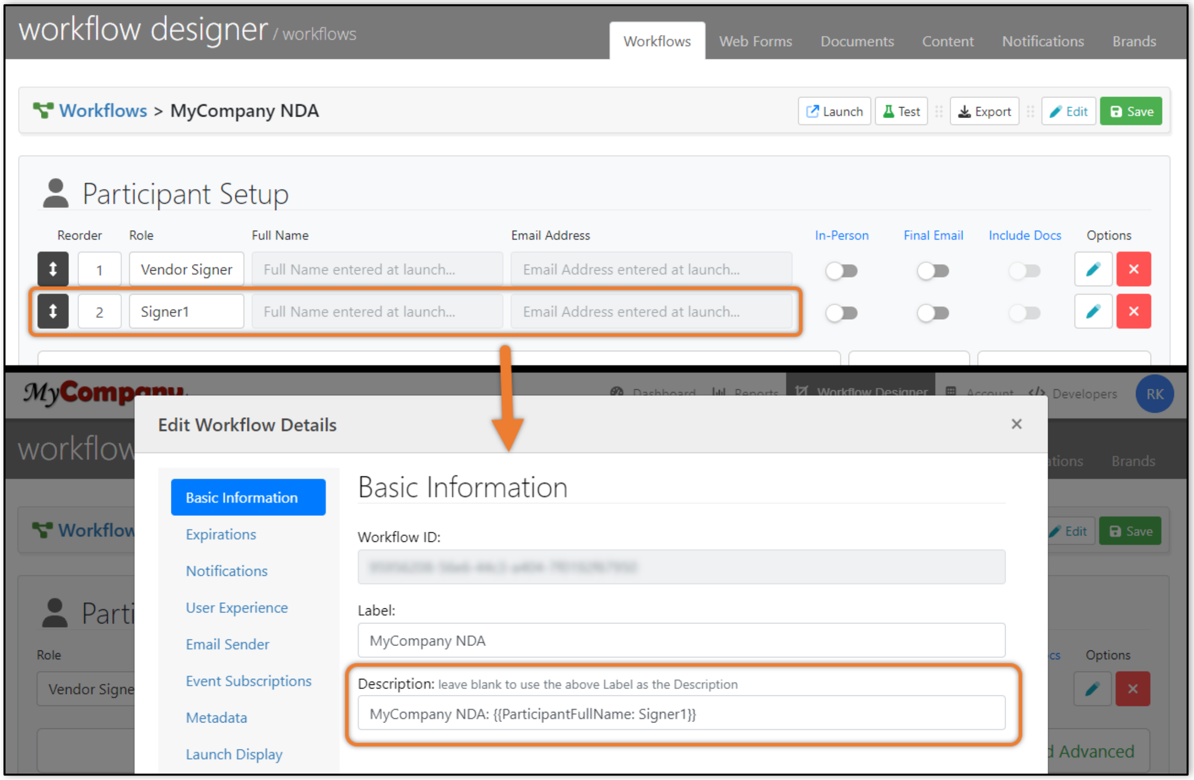
- **[PEP-8040]** ~ControlPanel ~UI/UX ~Workflows

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.



- **[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.

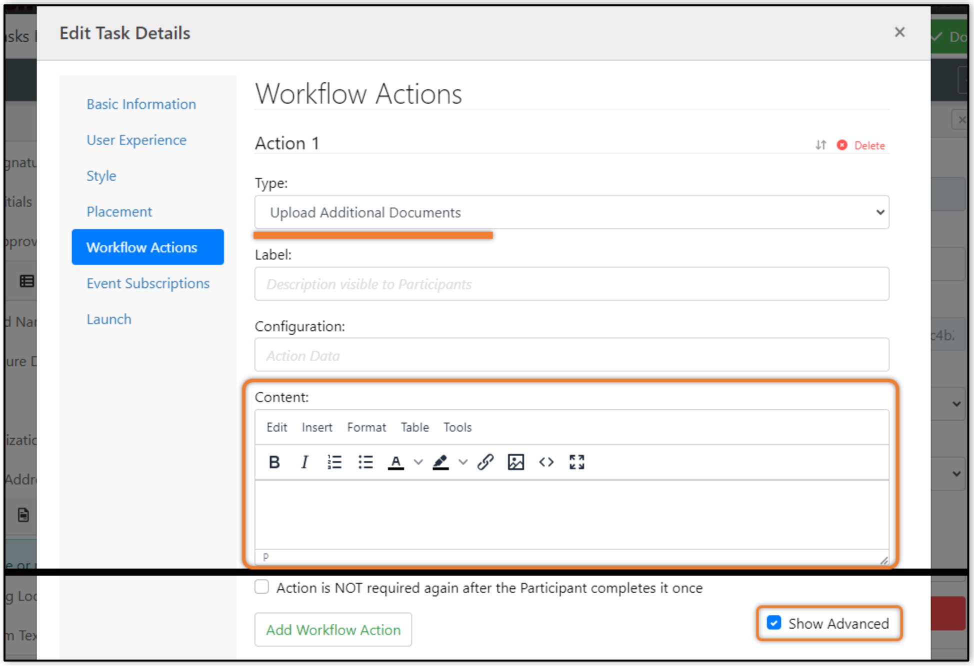


- **[PEP-7538]** ~Workflows

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.

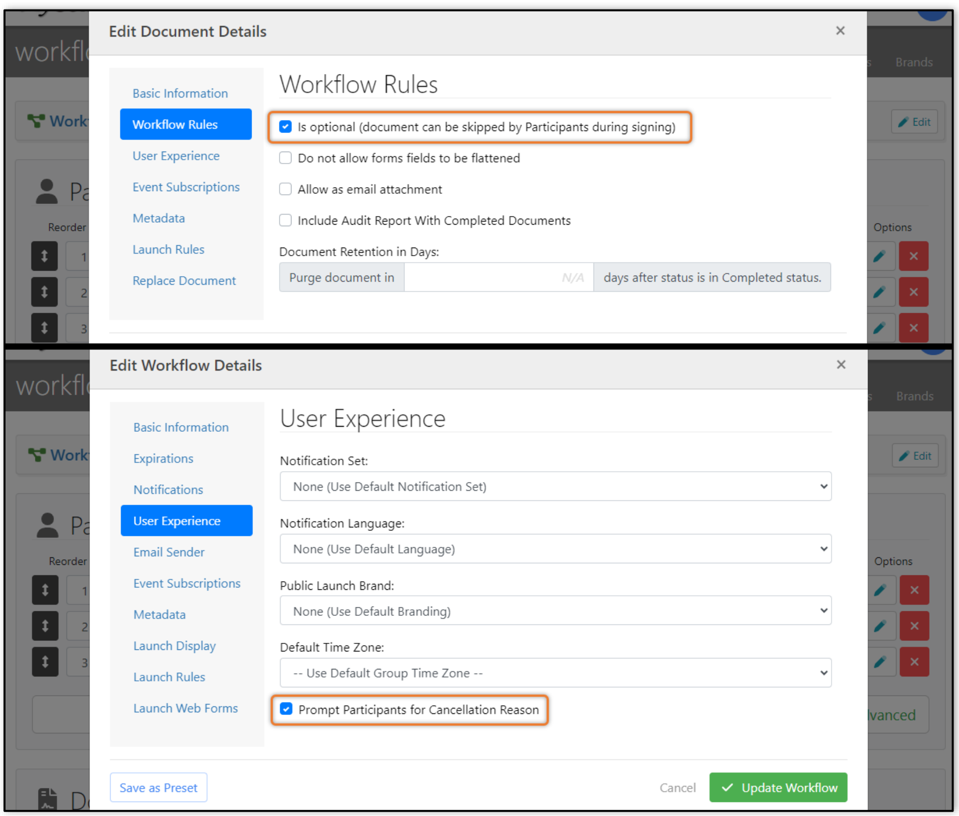
- **[PEP-7297]** ~API/WebServices ~ContentSets ~Documents ~WorkflowActions ~Workflows

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

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



v5.18.11.2 Release *Release Date: 7/16/2024*

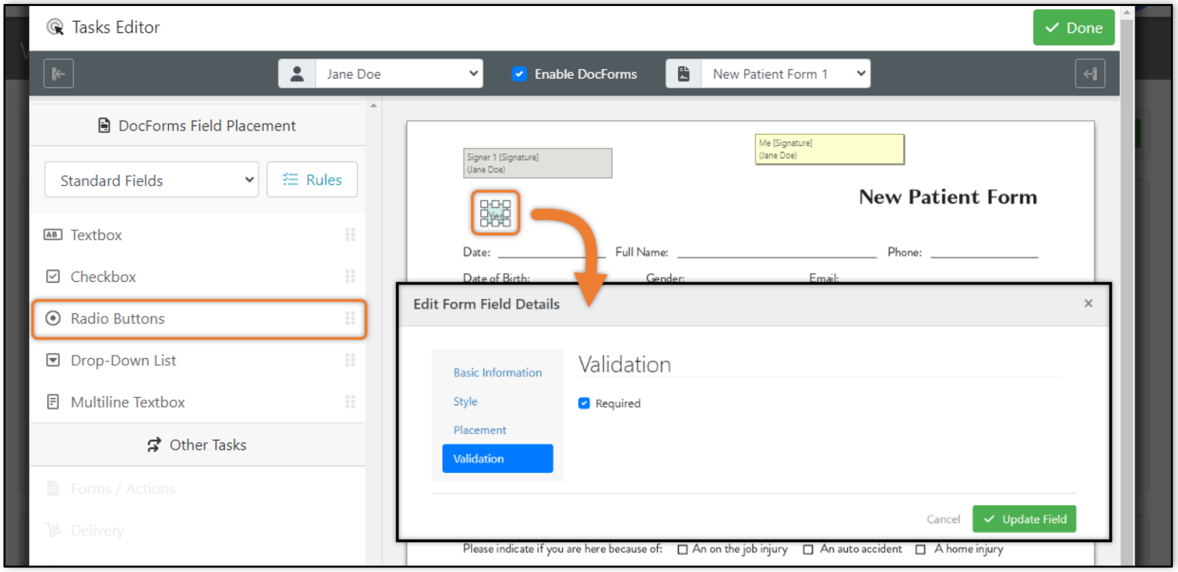
Bug Fixes

- **[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.

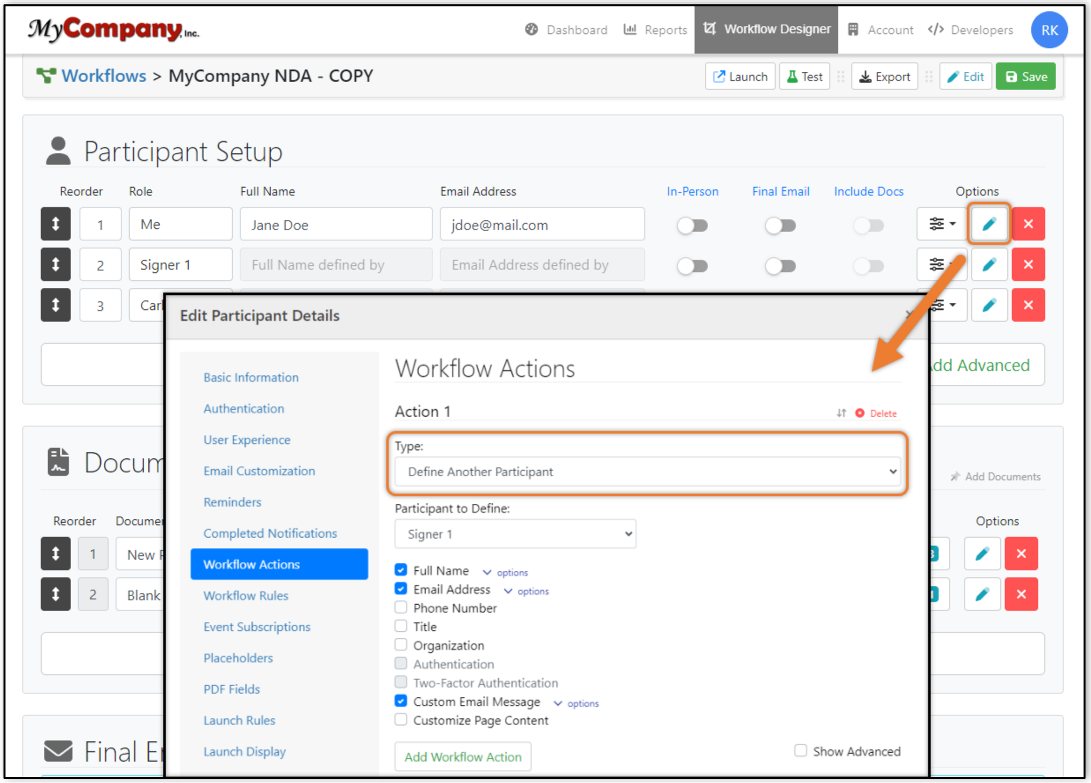


v5.18.11.1 Release *Release Date: 7/12/2024*

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.

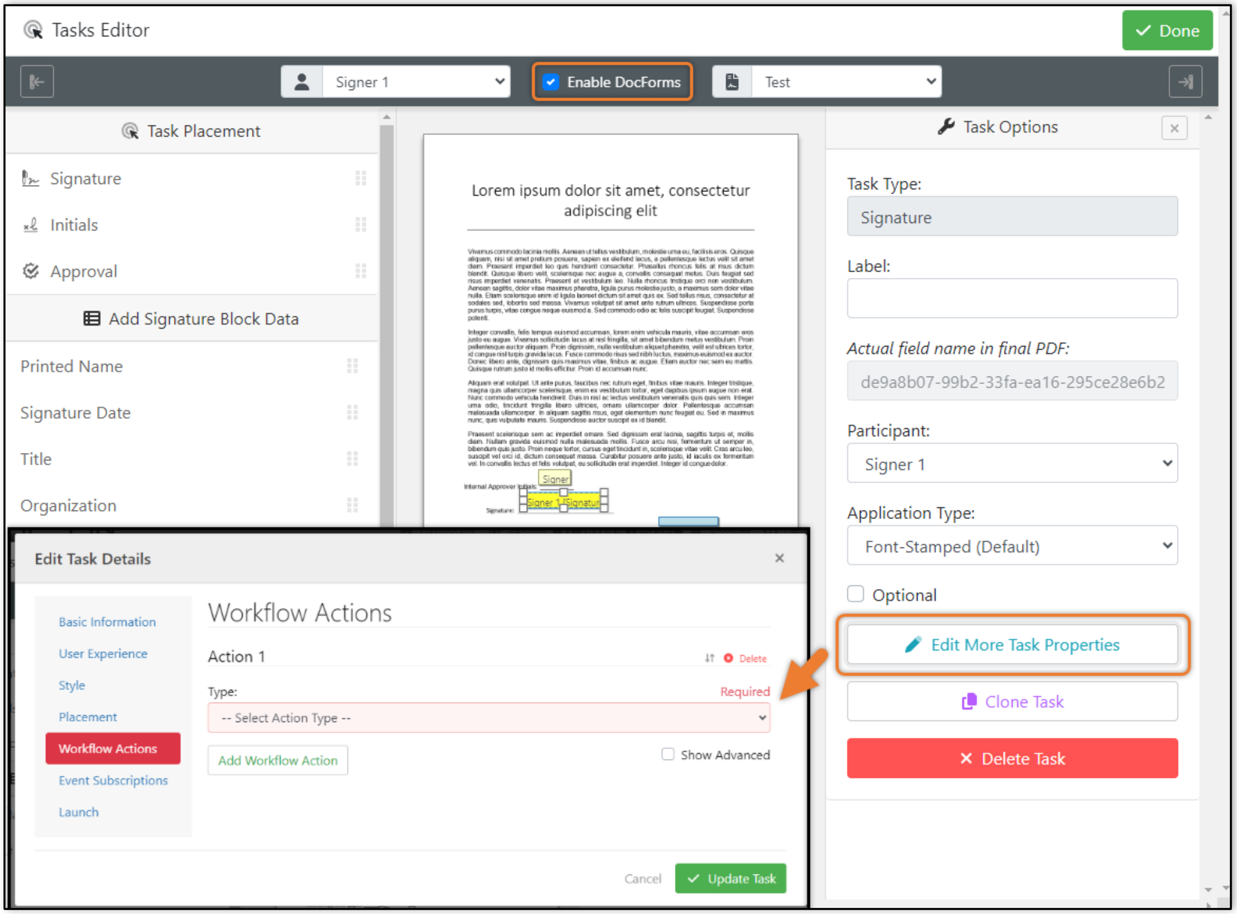


v5.18.11 Release *Release Date: 6/27/2024*

Bug Fixes

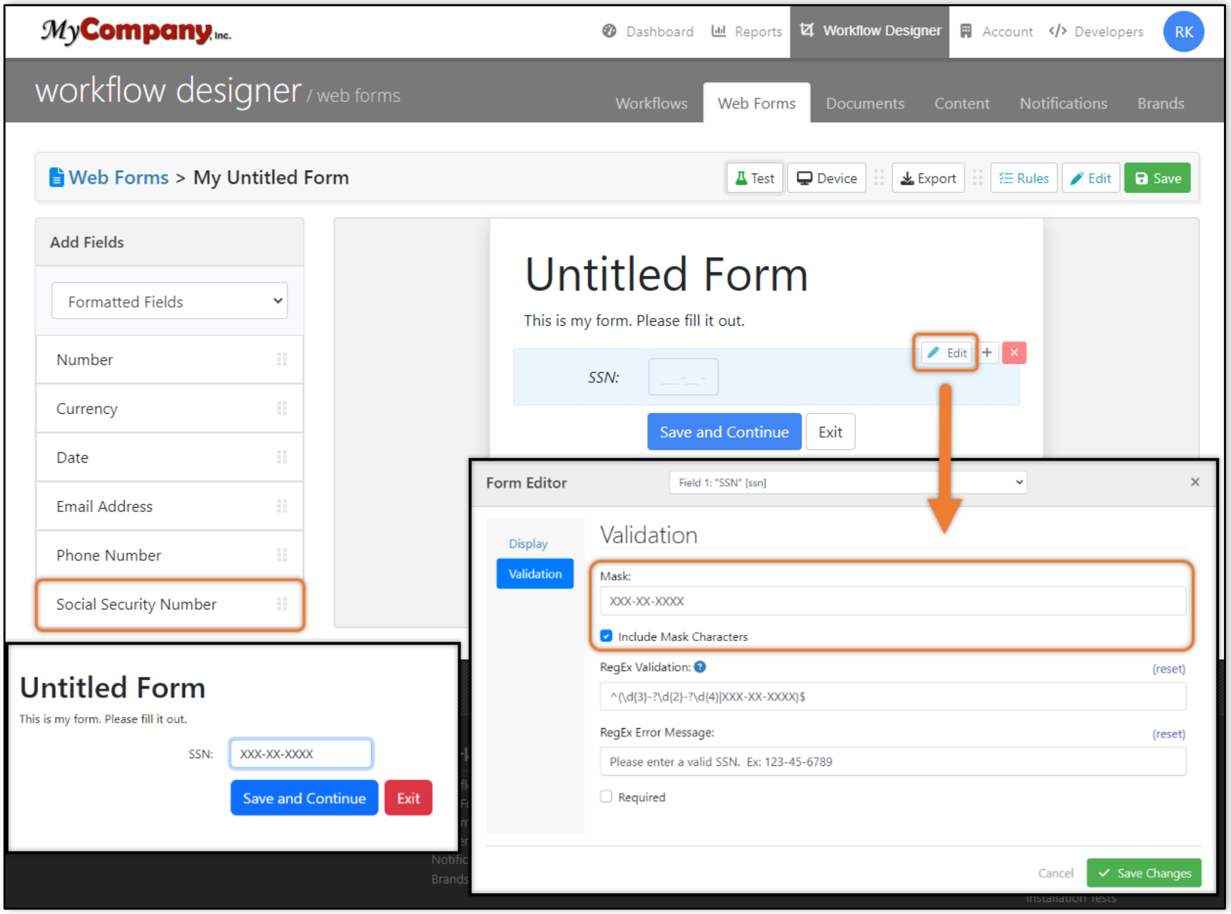
- **[PEP-8156]** ~Forms ~WorkflowActions

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



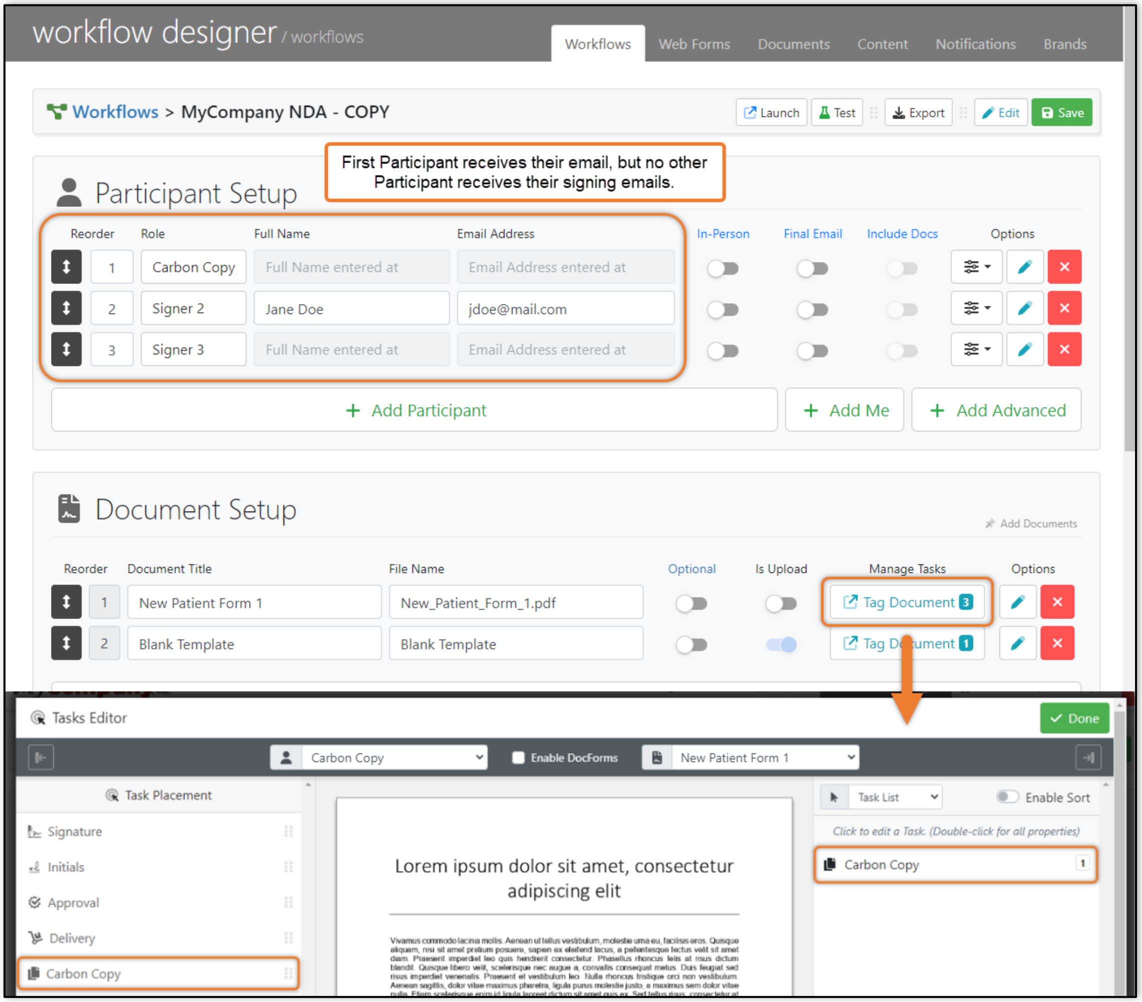
- **[PEP-8148]** ~Forms

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.



- **[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.

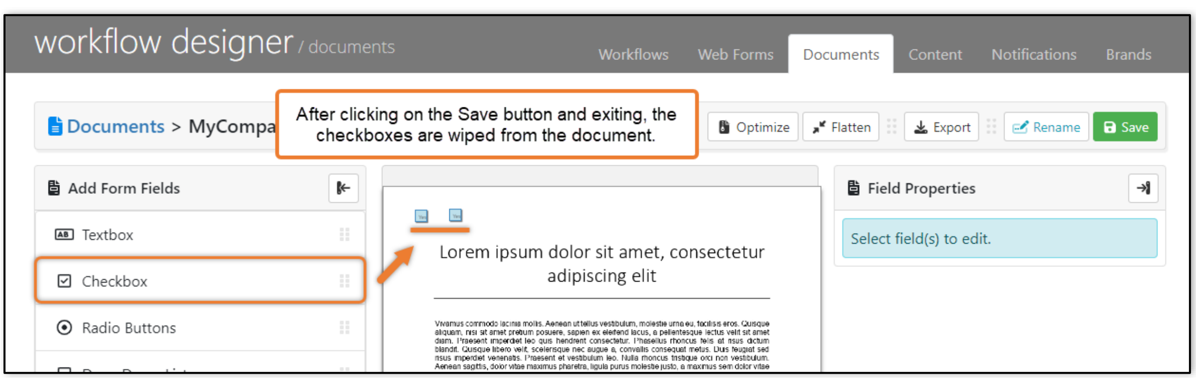


- **[PEP-8141]** ~API/WebServices

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.

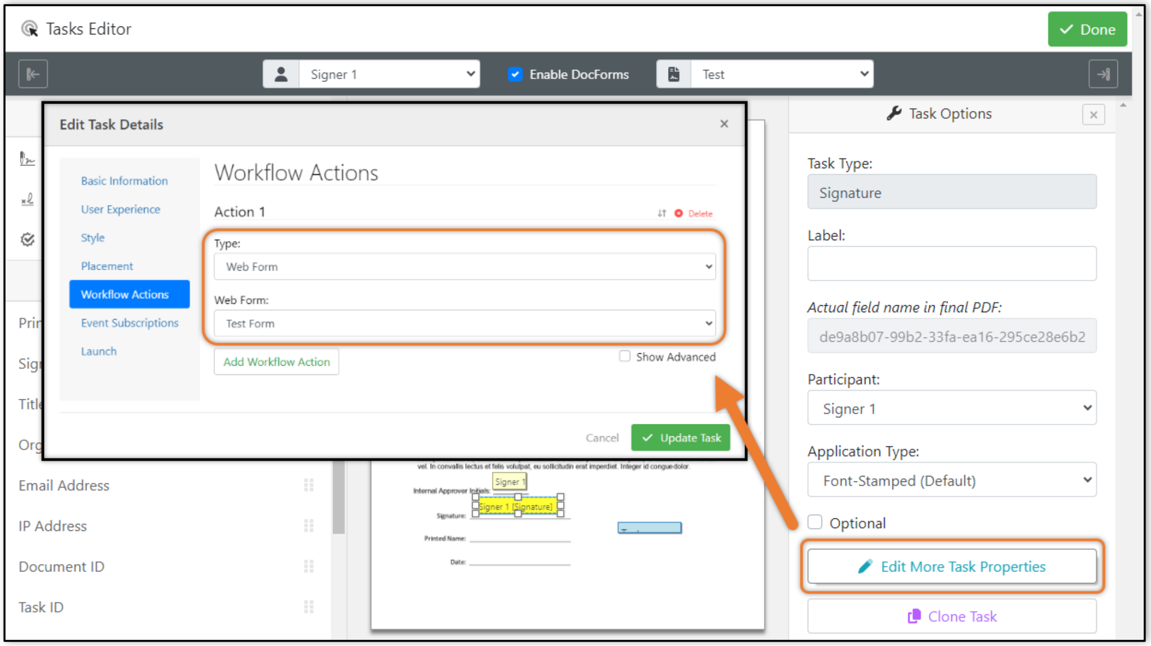


v5.18.10 Release — *Release Date: 6/14/2024*

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.

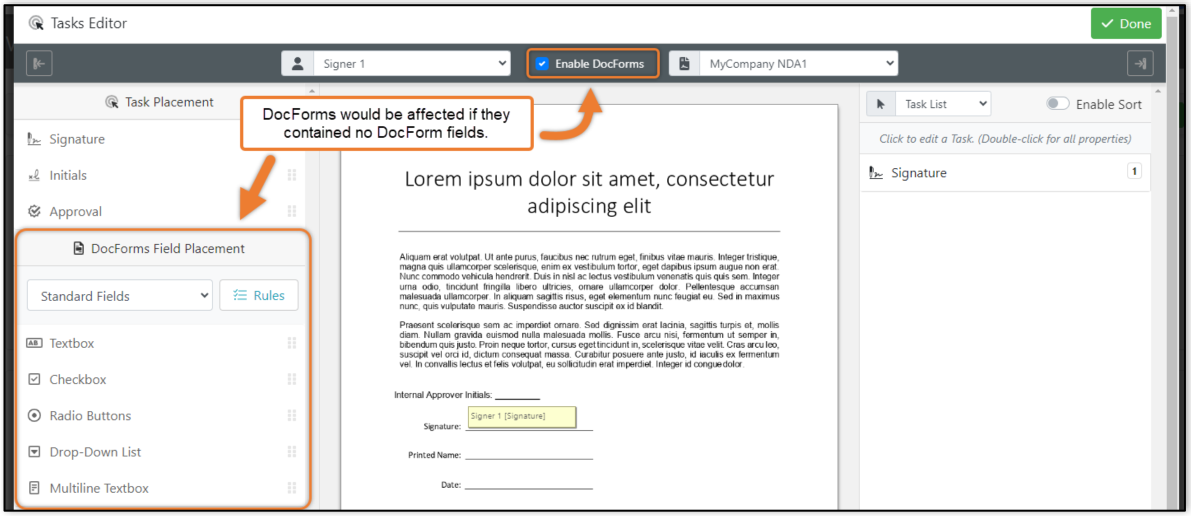


v5.18.9 Release — *Release Date: 6/7/2024*

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.

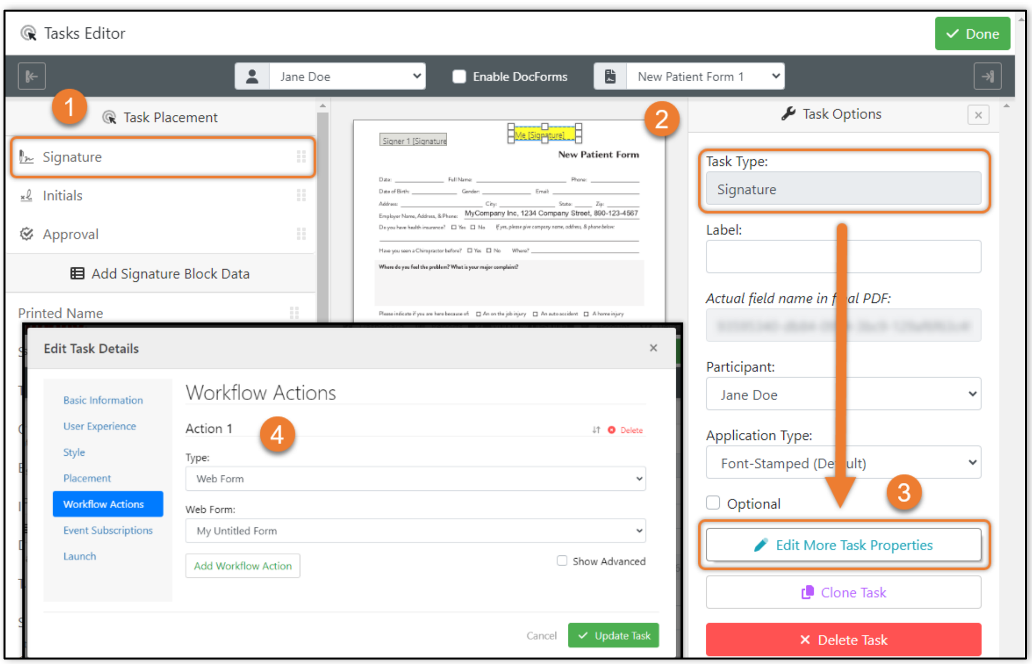


v5.18.8 Release *Release Date: 5/23/2024*

Bug Fixes

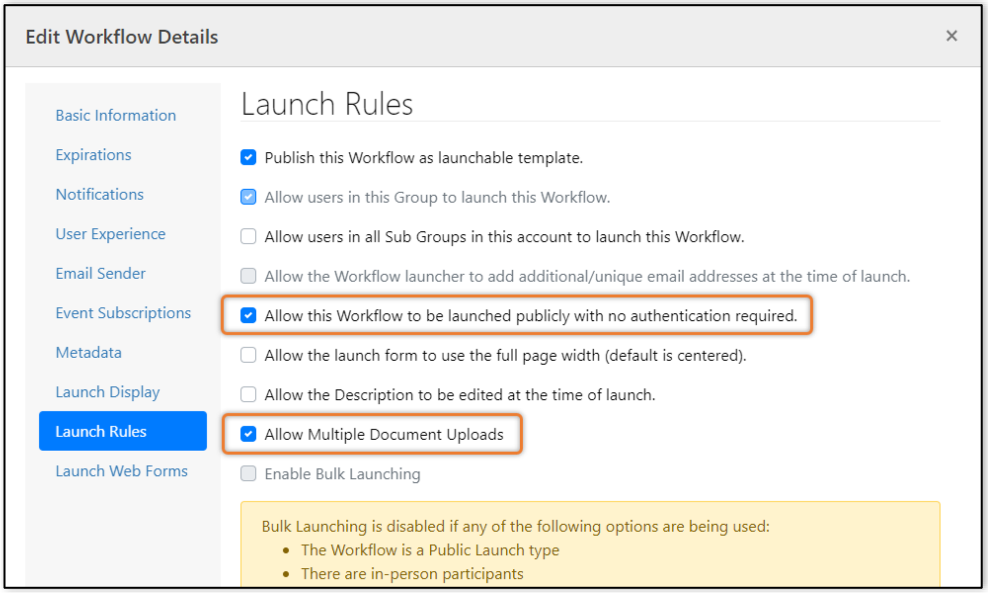
- **[PEP-8048]** ~Forms ~WorkflowActions ~Workflows

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*

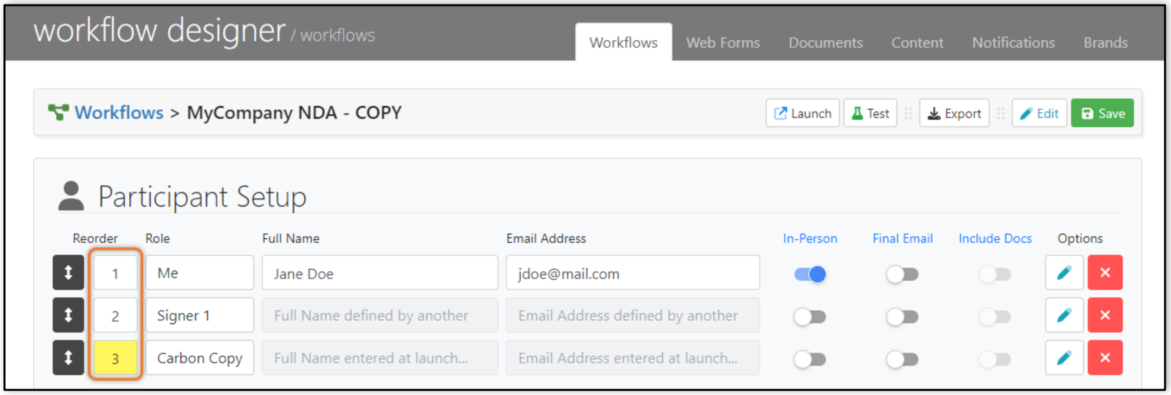
Bug Fixes

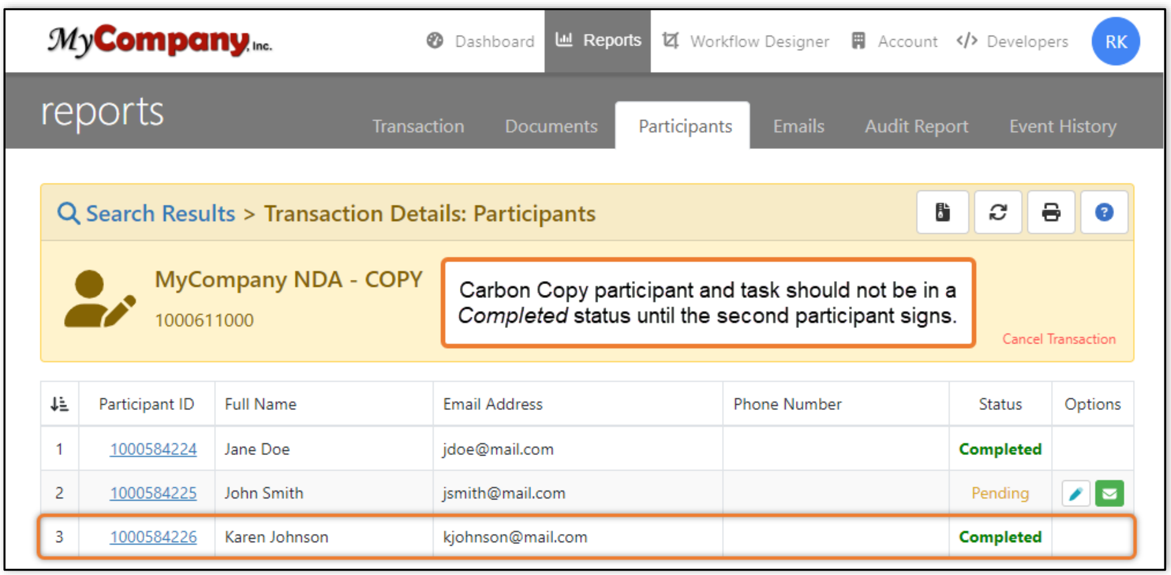
- **[PEP-7991]** ~Notifications ~Workflows

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

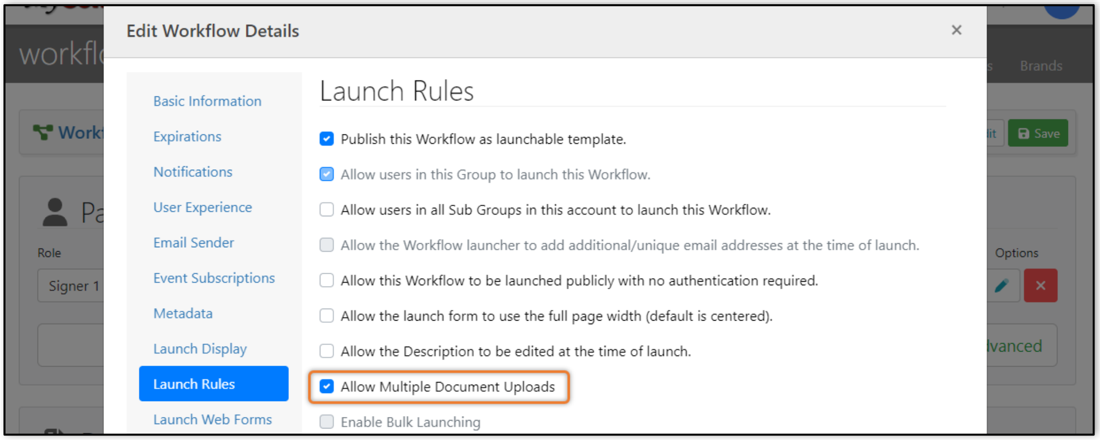
Fixed issue where Carbon Copy tasks, and related emails, would be completed prematurely and not according to the access order. Please see the images below for an example and more information.

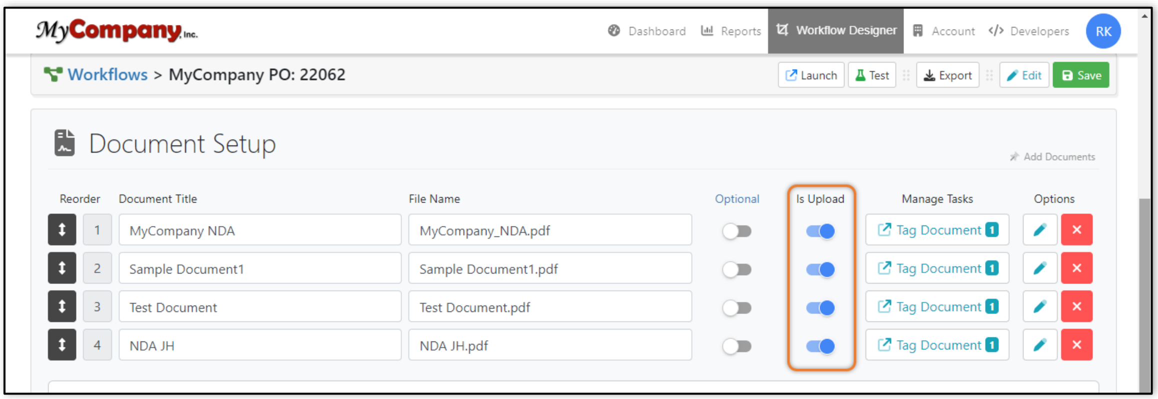




- **[PEP-7974]** ~Documents ~Workflows

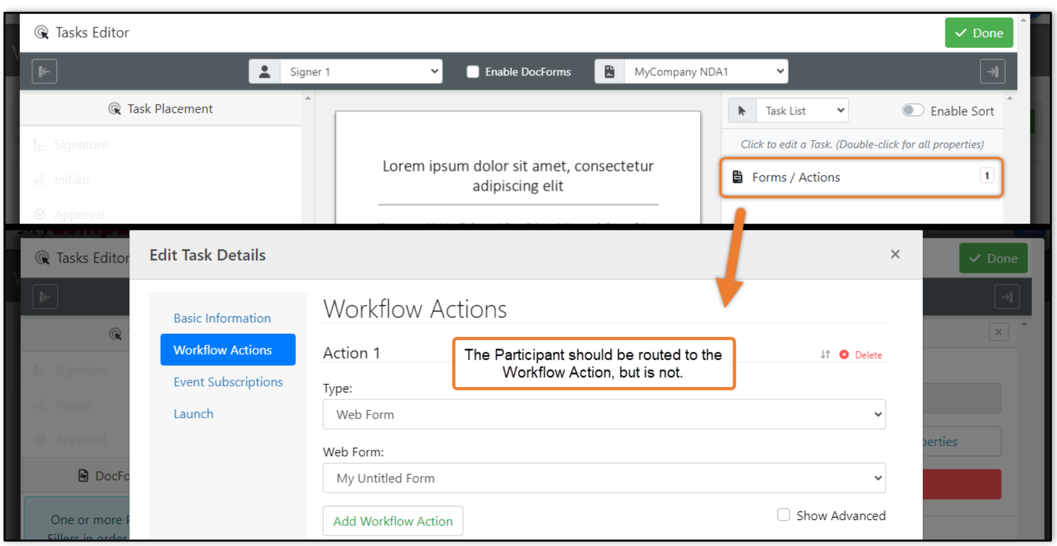
Fixed issue where large document uploads did not list the matched document name. Please see the images below for the referenced settings.





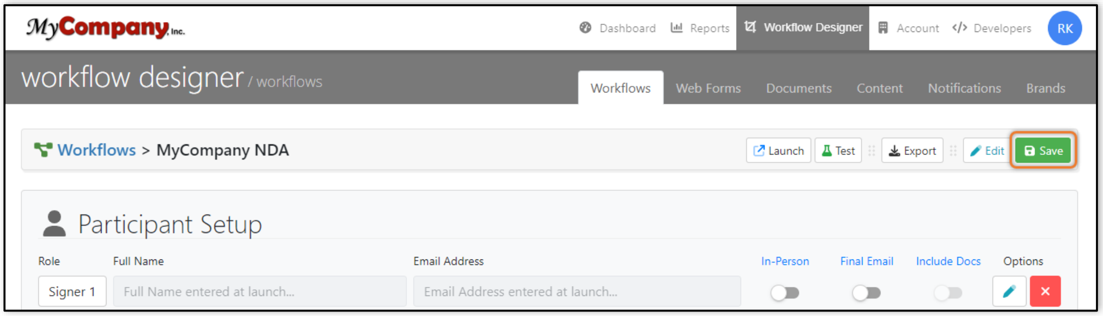
- **[PEP-7954]** ~WorkflowActions ~Workflows

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.



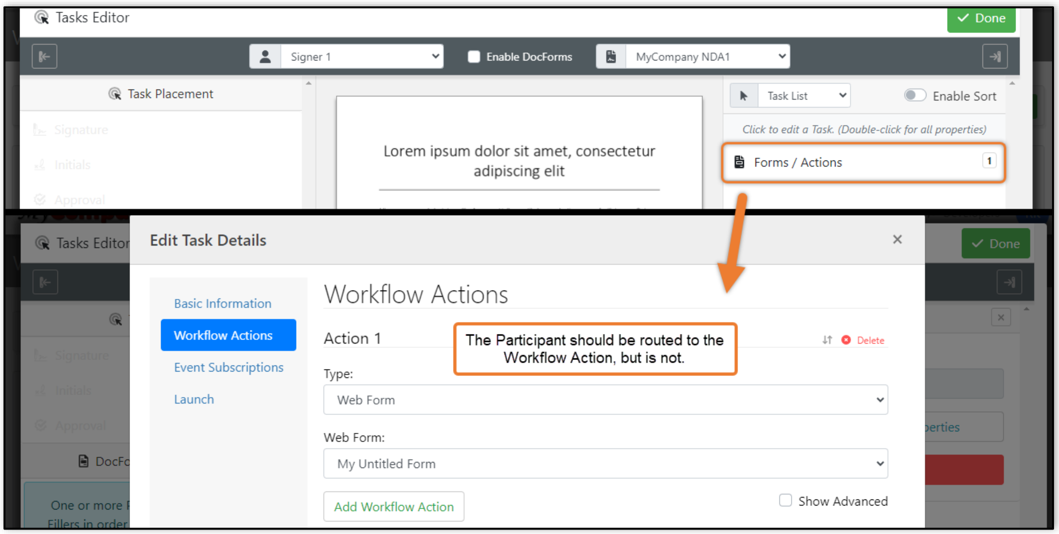
- **[PEP-7935]** ~UI/UX ~Workflows

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.



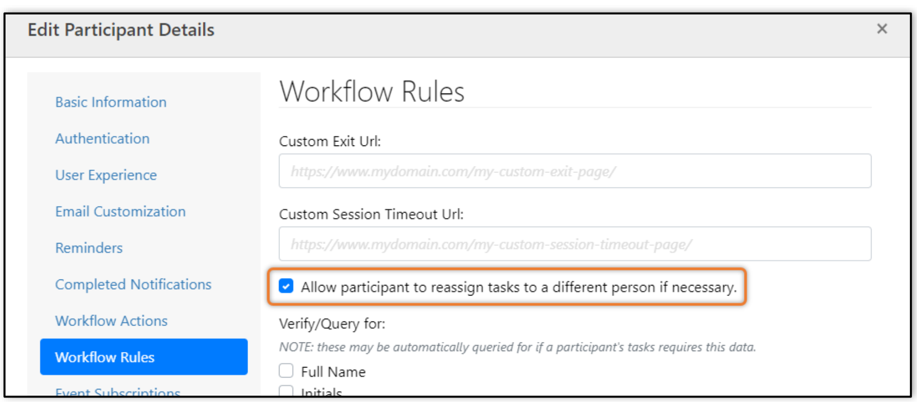
- **[PEP-7910]** ~Forms ~Workflows

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.



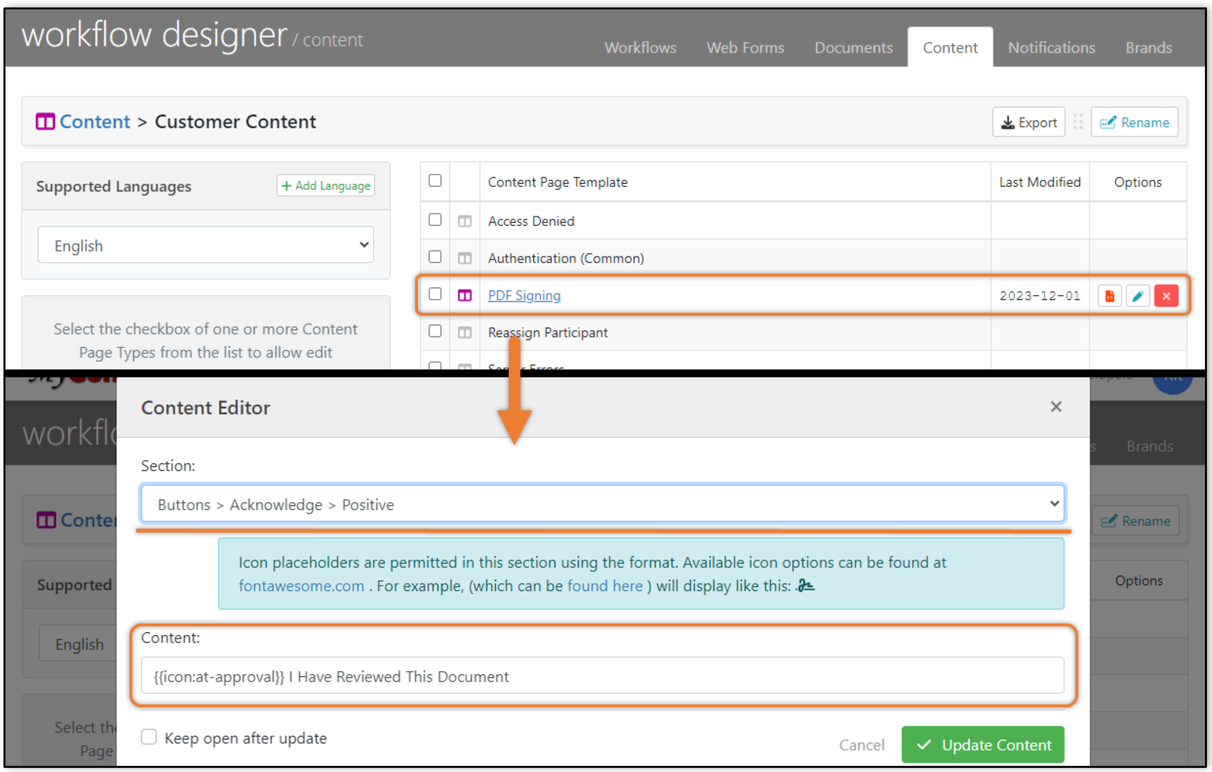
Bug Fixes

- **[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.

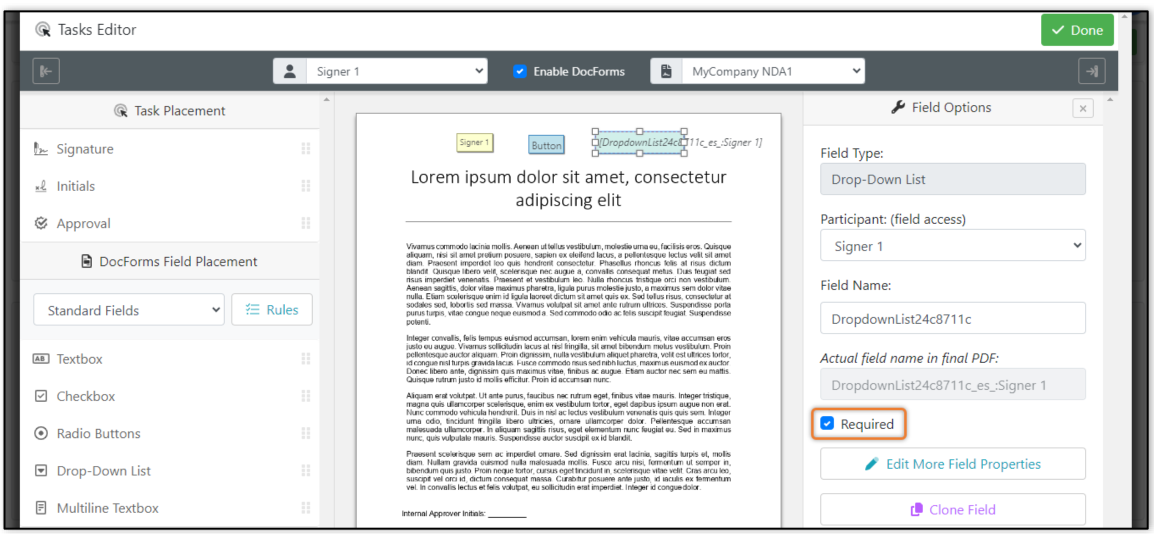
Bug Fixes

- **[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.

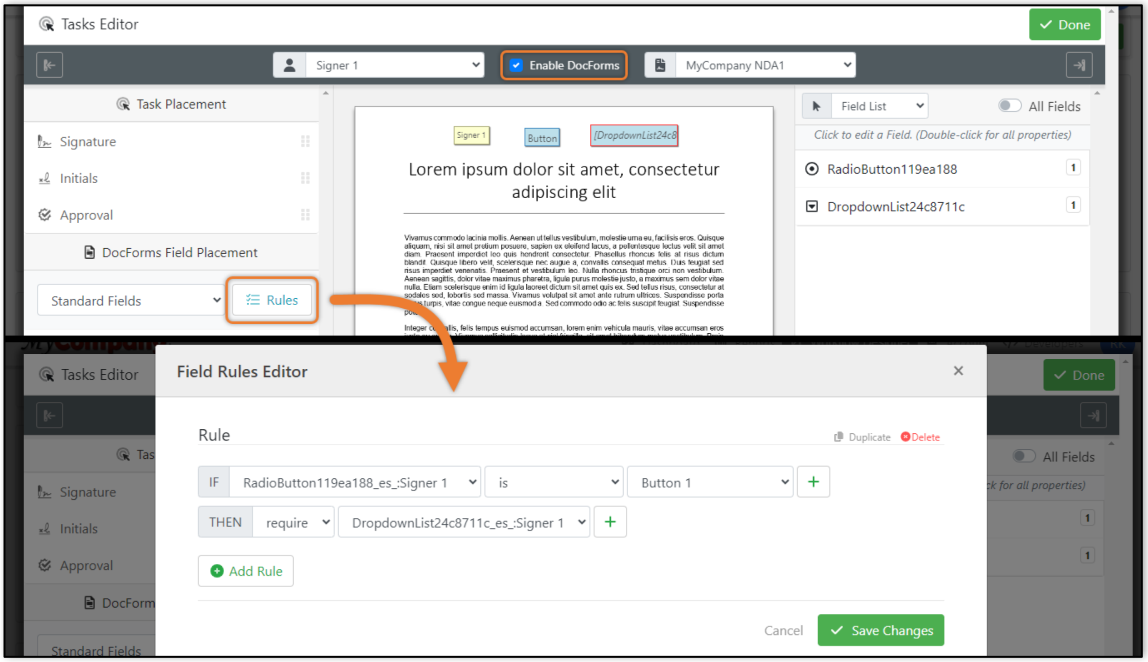
- **[PEP-7854]** ~Forms

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.

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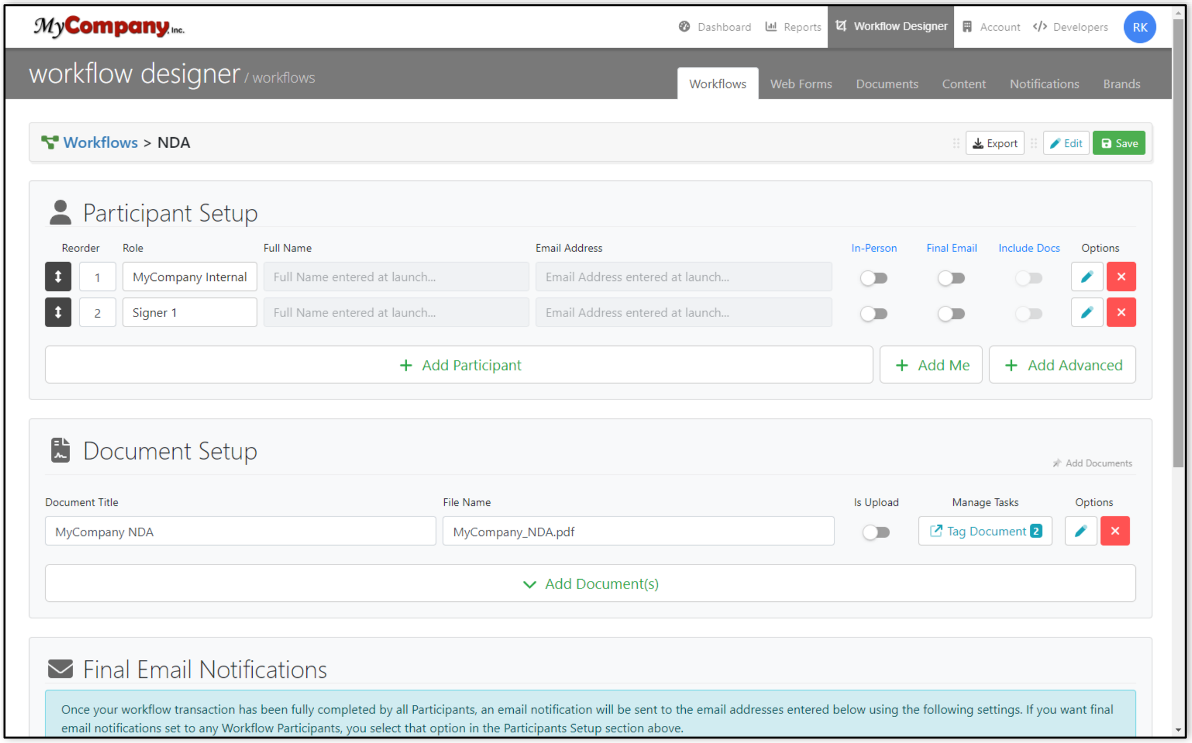
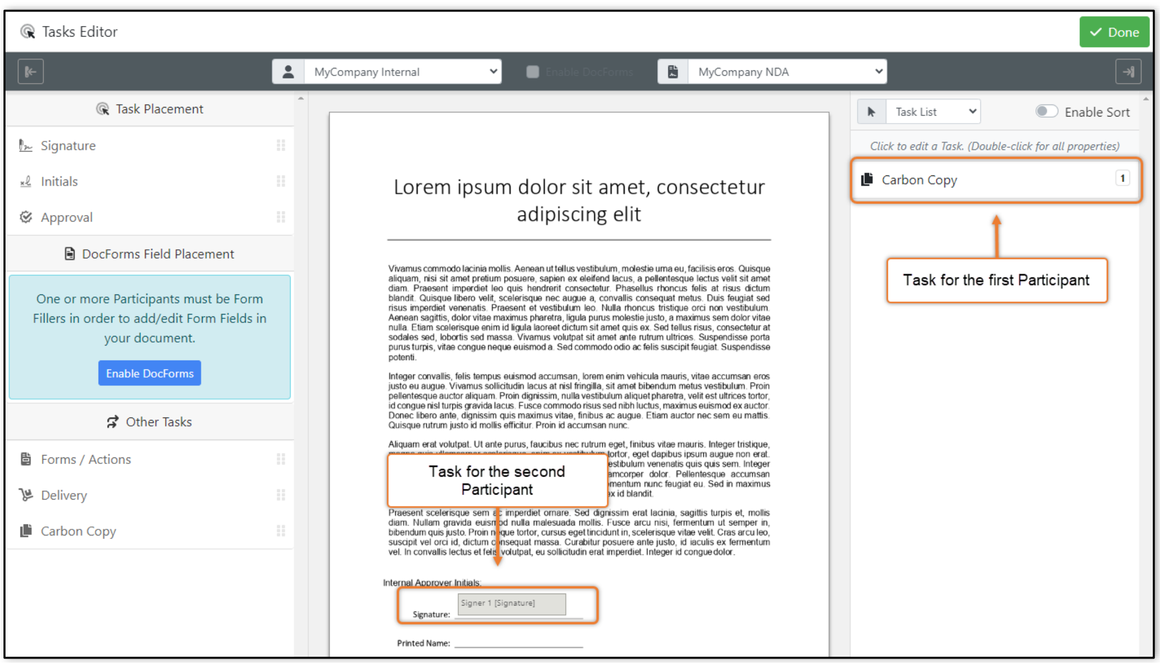
v5.18.3 Release *Release Date: 3/29/2024*

Bug Fixes

- **[PEP-7867]** ~Signing ~Transactions ~Workflows

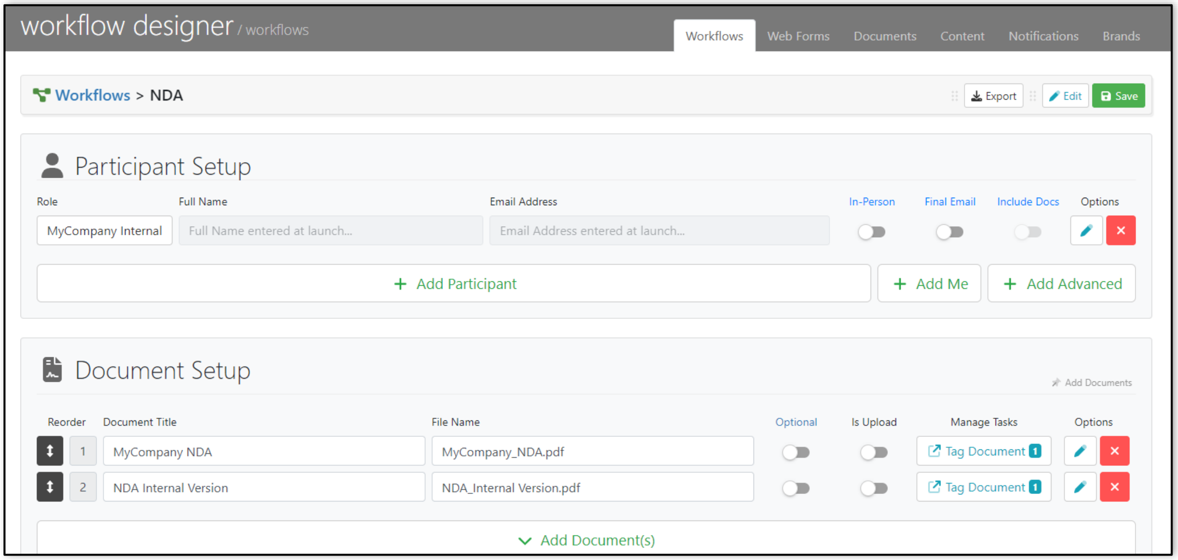
Fixed issue where Transactions with a carbon copy task assigned to the first Participant would get stuck in a Pending status. Please see the images below for additional details and an example.

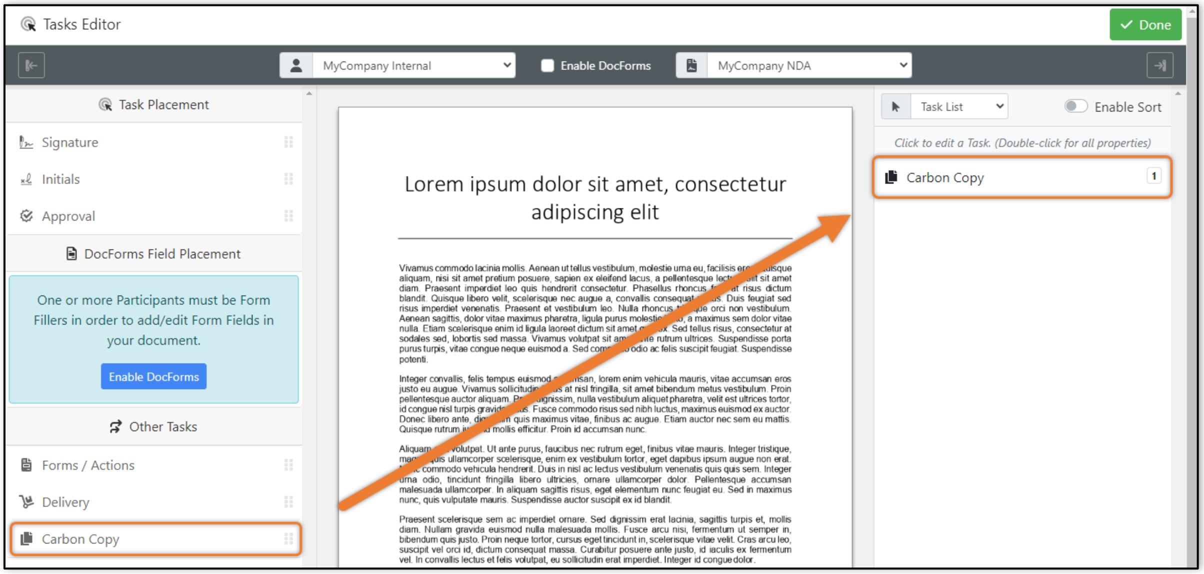




- **[PEP-7866]** ~Signing ~Transactions ~Workflows

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.

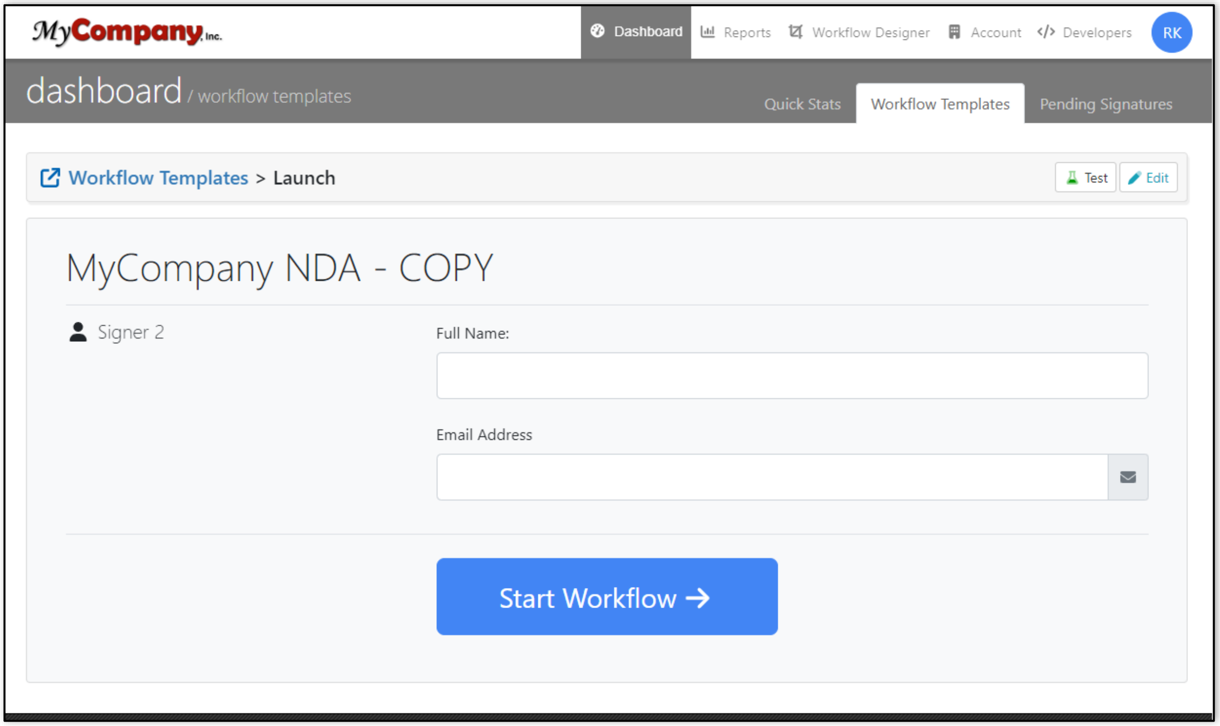




- **[PEP-7856]** ~API/WebServices ~Signatures ~Signing
Fixed issue where using the UpdateDocumentTextStamps() API call under certain use cases would cause a corrupted PDF document.

- **[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.

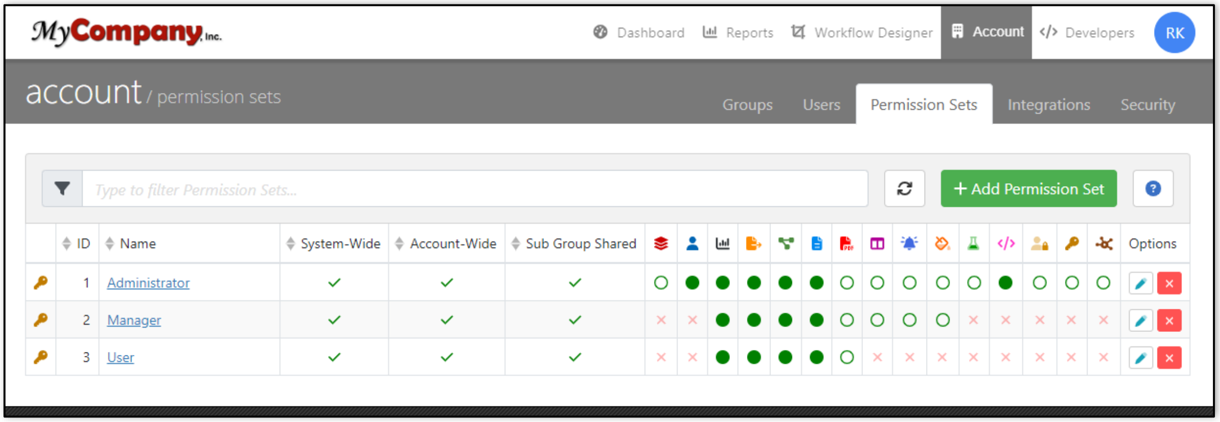


v5.18.2 Release *Release Date: 3/14/2024*

Bug Fixes

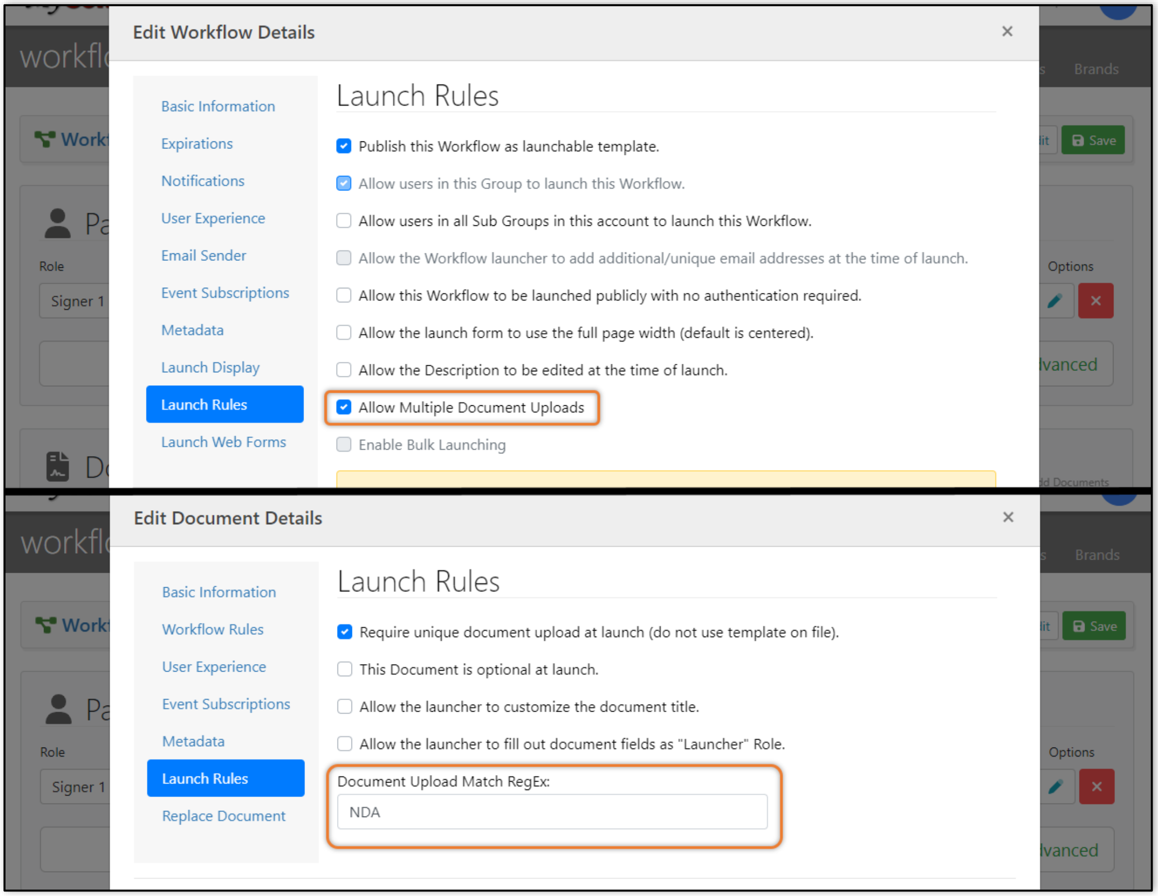
- **[PEP-7791]** ~Access/Permissions ~ControlPanel ~Users

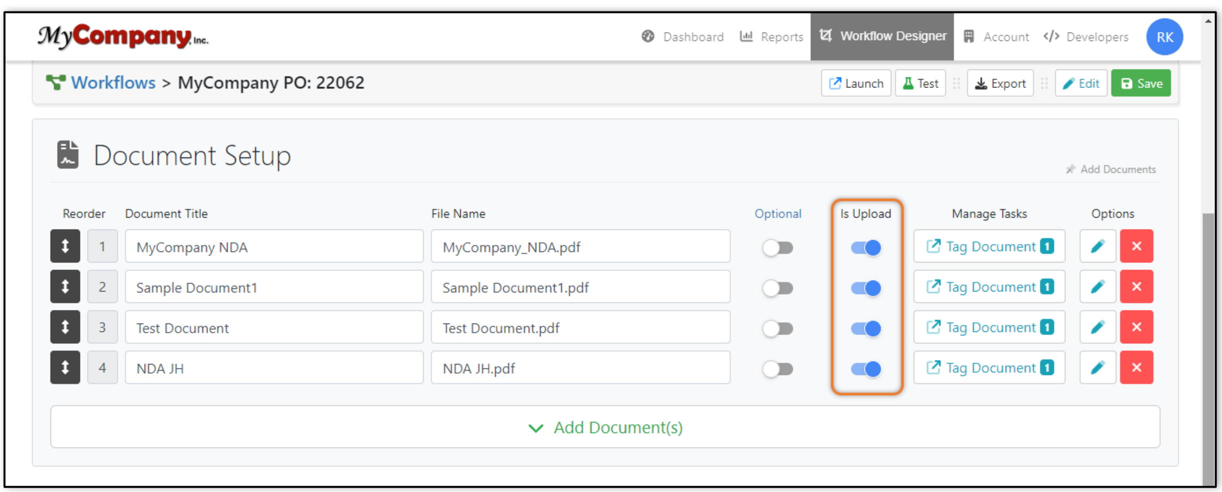
Fixed issue where PermissionSets were not updating in the database making it look like all of the settings were removed. Please see the image below for the referenced settings.



- **[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.



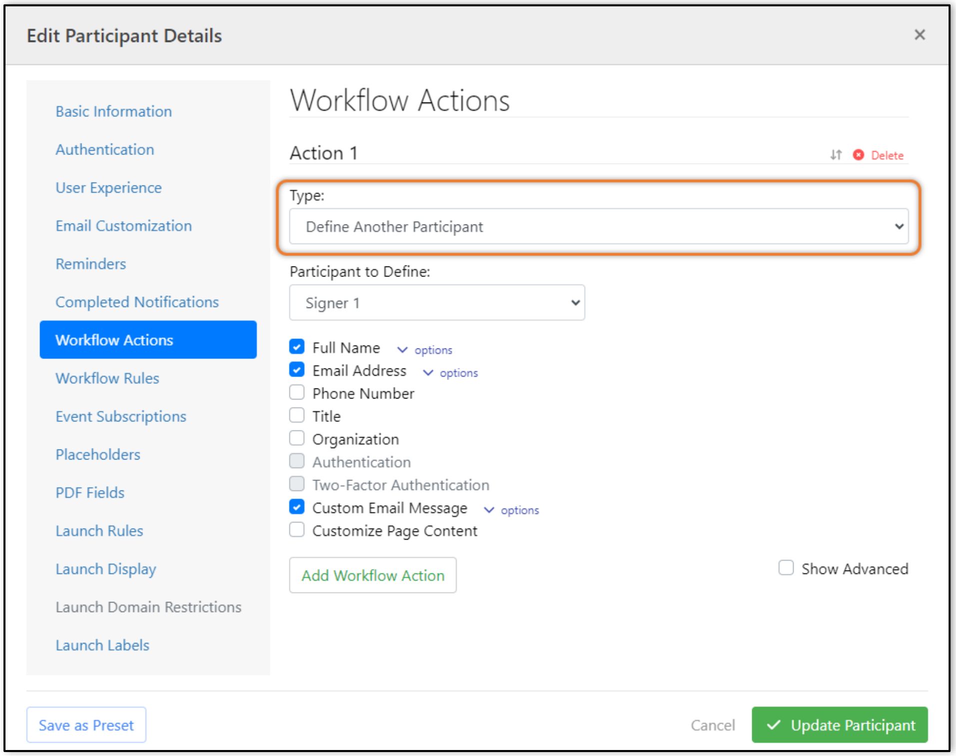


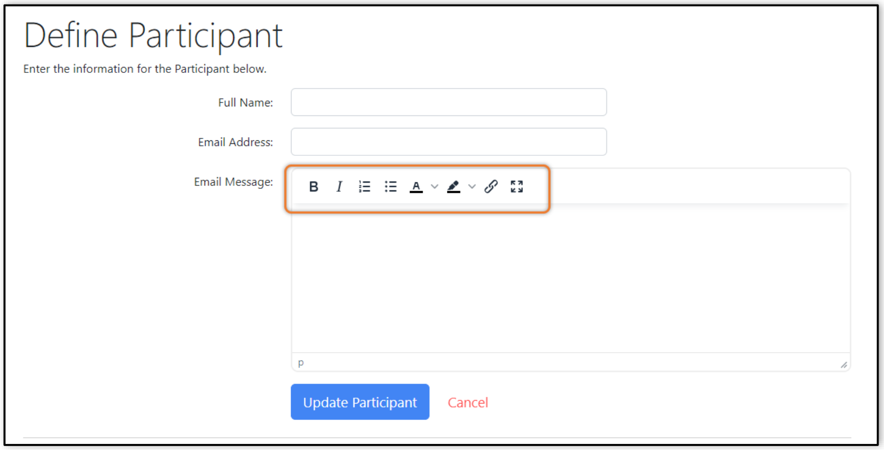
v5.18.1 Release *Release Date: 3/7/2024*

Bug Fixes

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

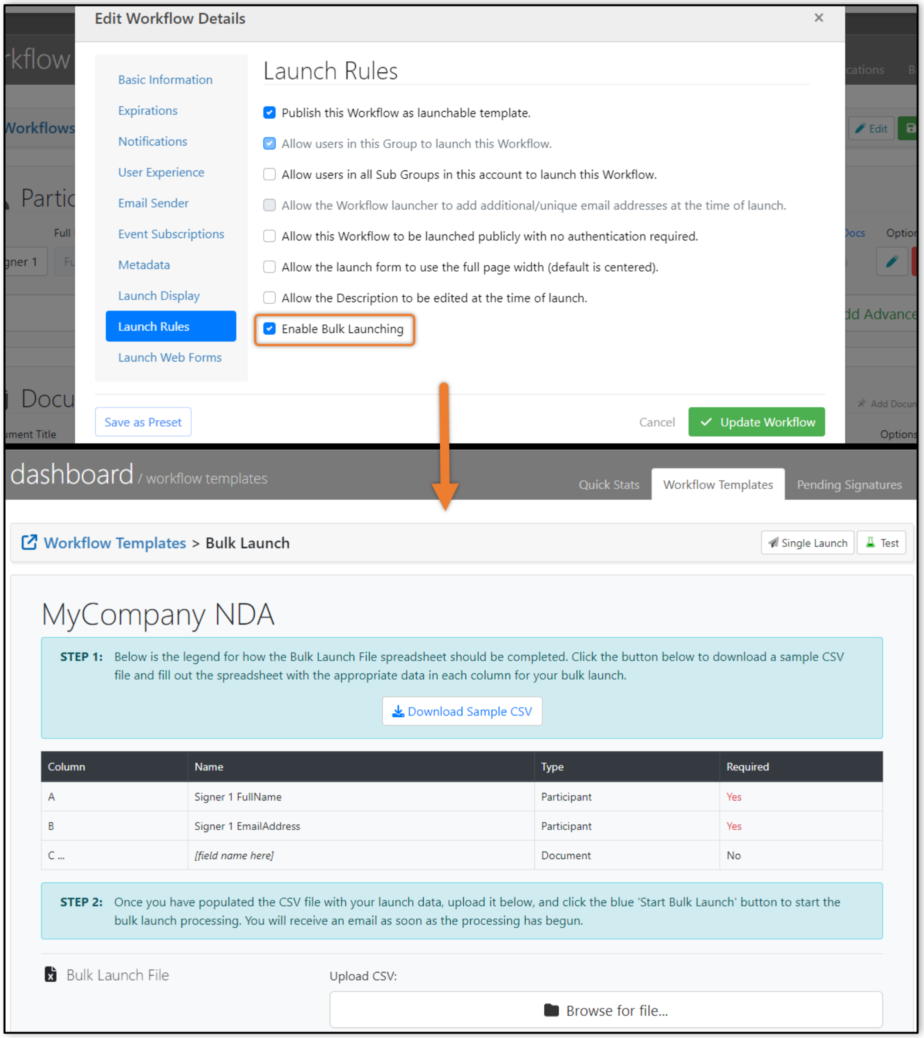
Fixed issue where TinyMCE would not properly load on Define Participant Workflow Actions. Please see the images below of the referenced settings and an example of the TinyMCE.





- **[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.

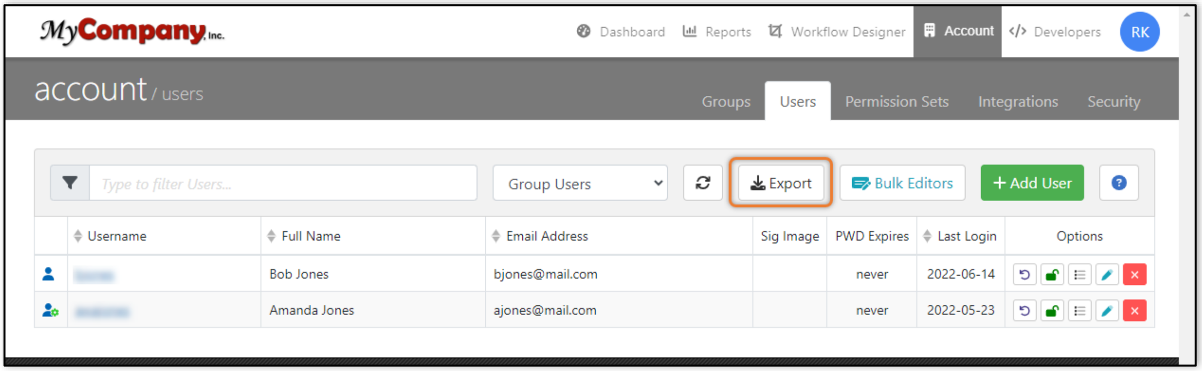


- **[PEP-7718]** ~Documents ~Signing

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

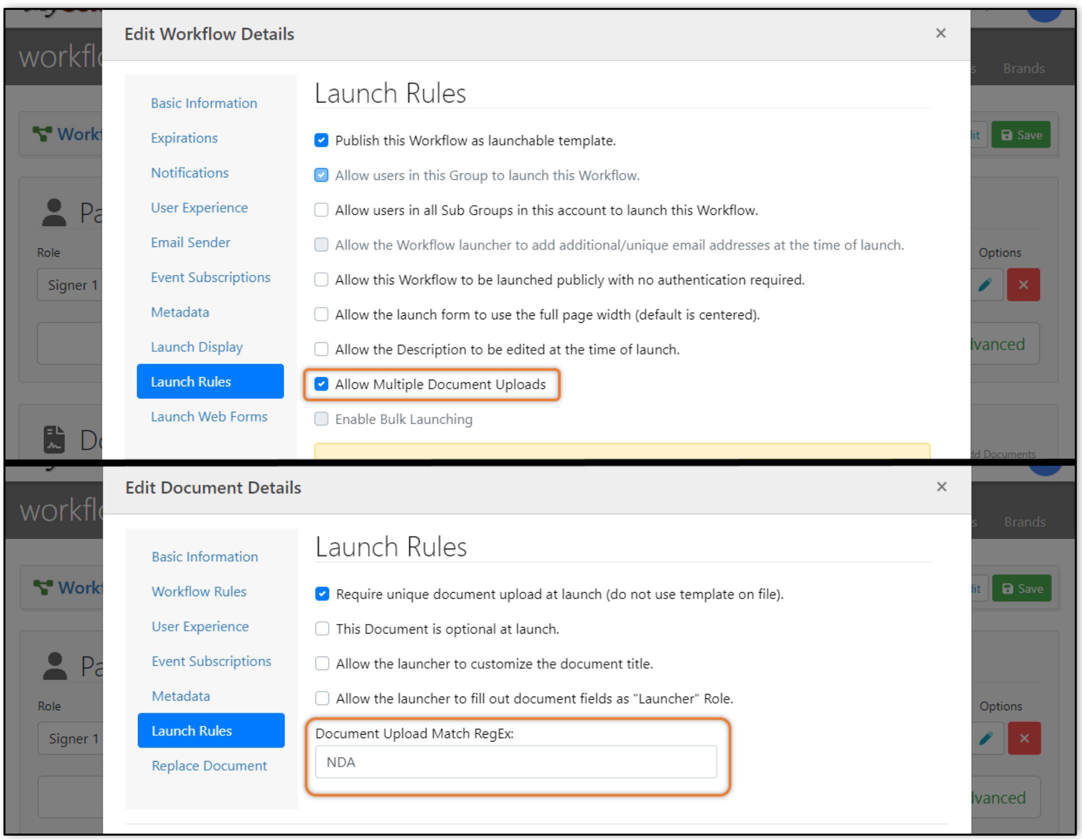
- **[PEP-7691]** ~ControlPanel ~Users

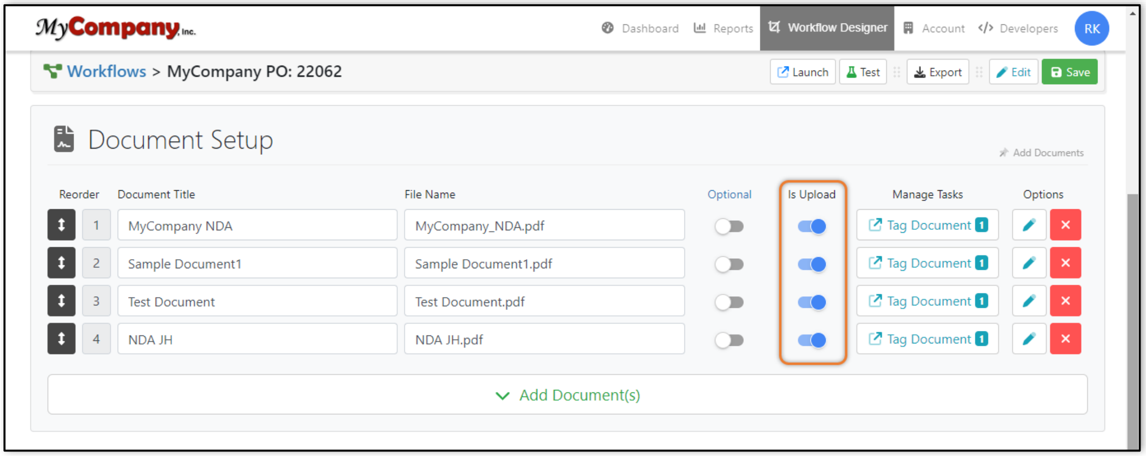
Fixed issue where CSV exports would not be properly formatted due to commas. All strings are now wrapped in double quotes to ensure properly CSV exports. Please see the image below for an example of a CSV export.

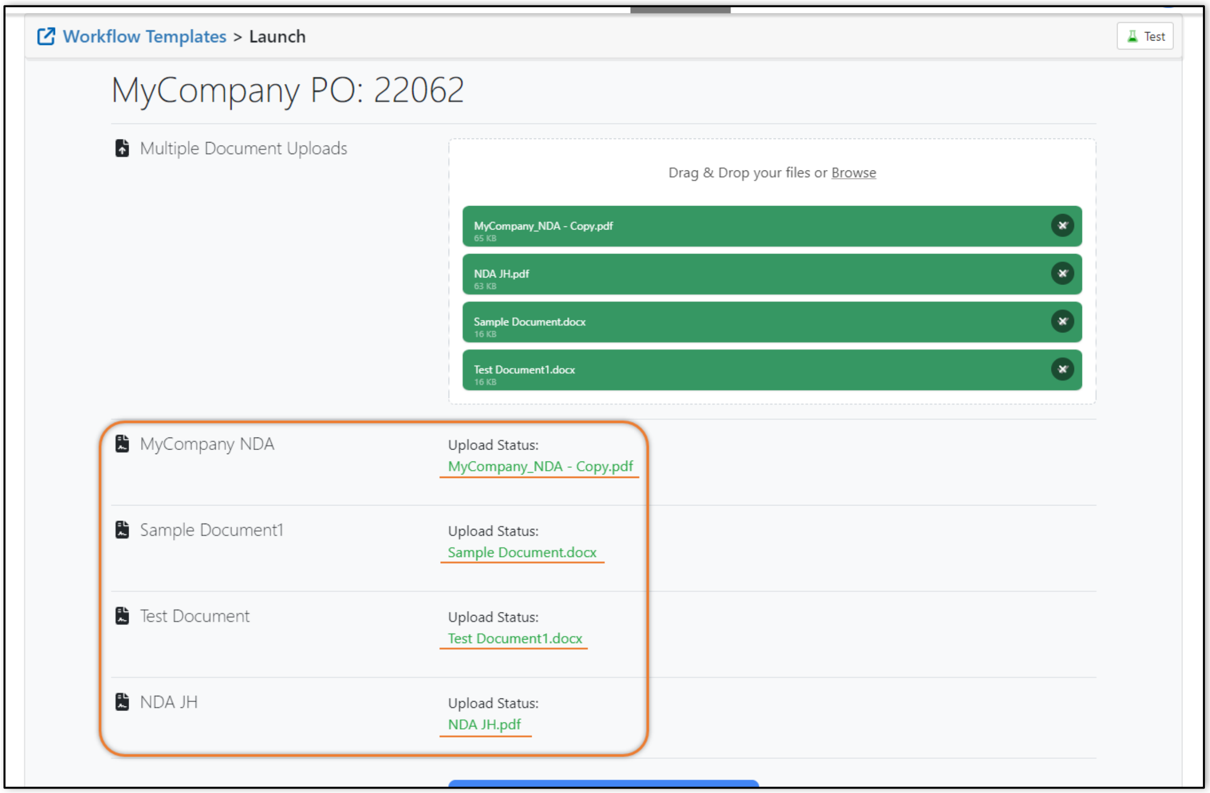


- **[PEP-7683]** ~ControlPanel ~Documents

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.

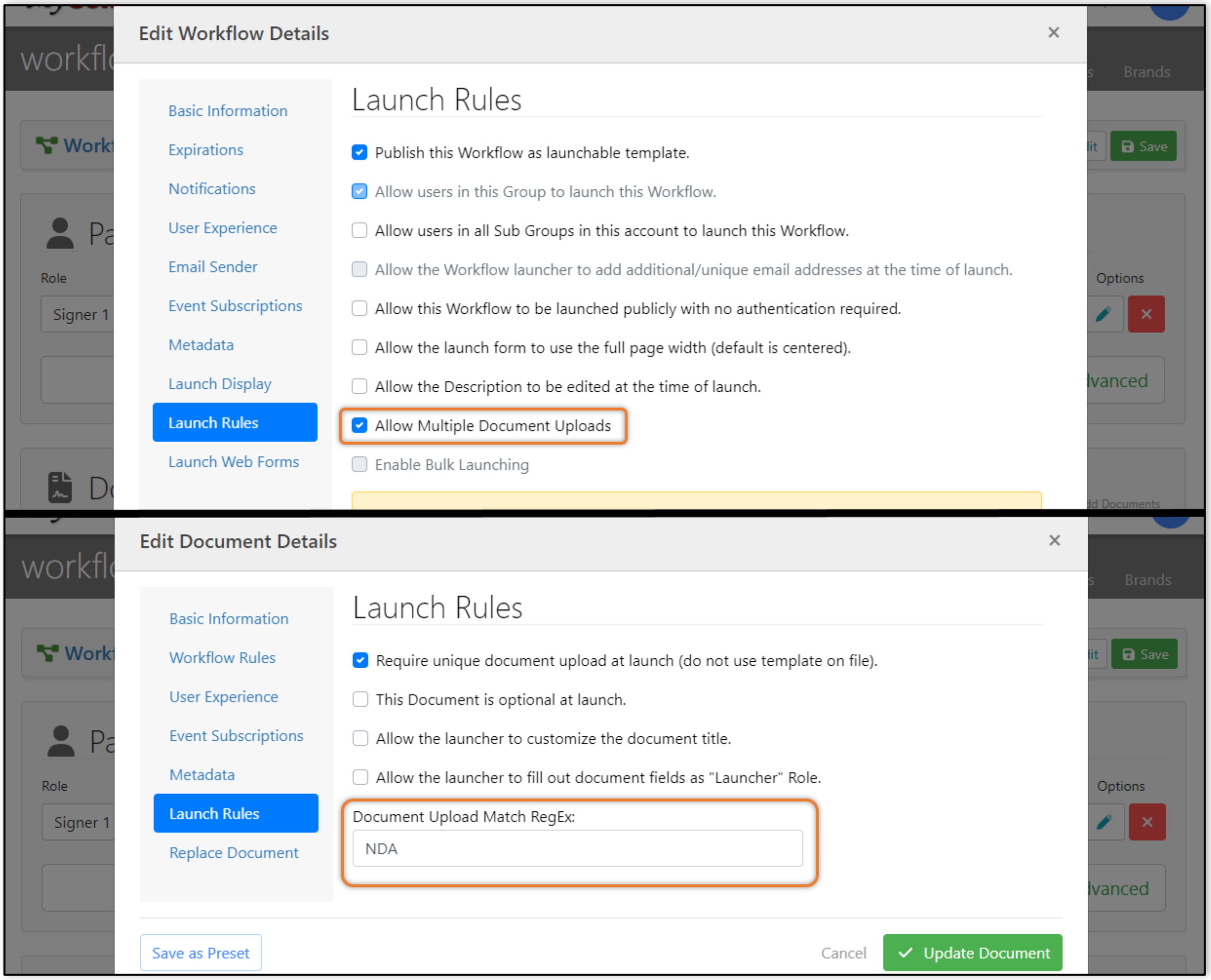






- **[PEP-7682]** ~UI/UX ~Workflows

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.

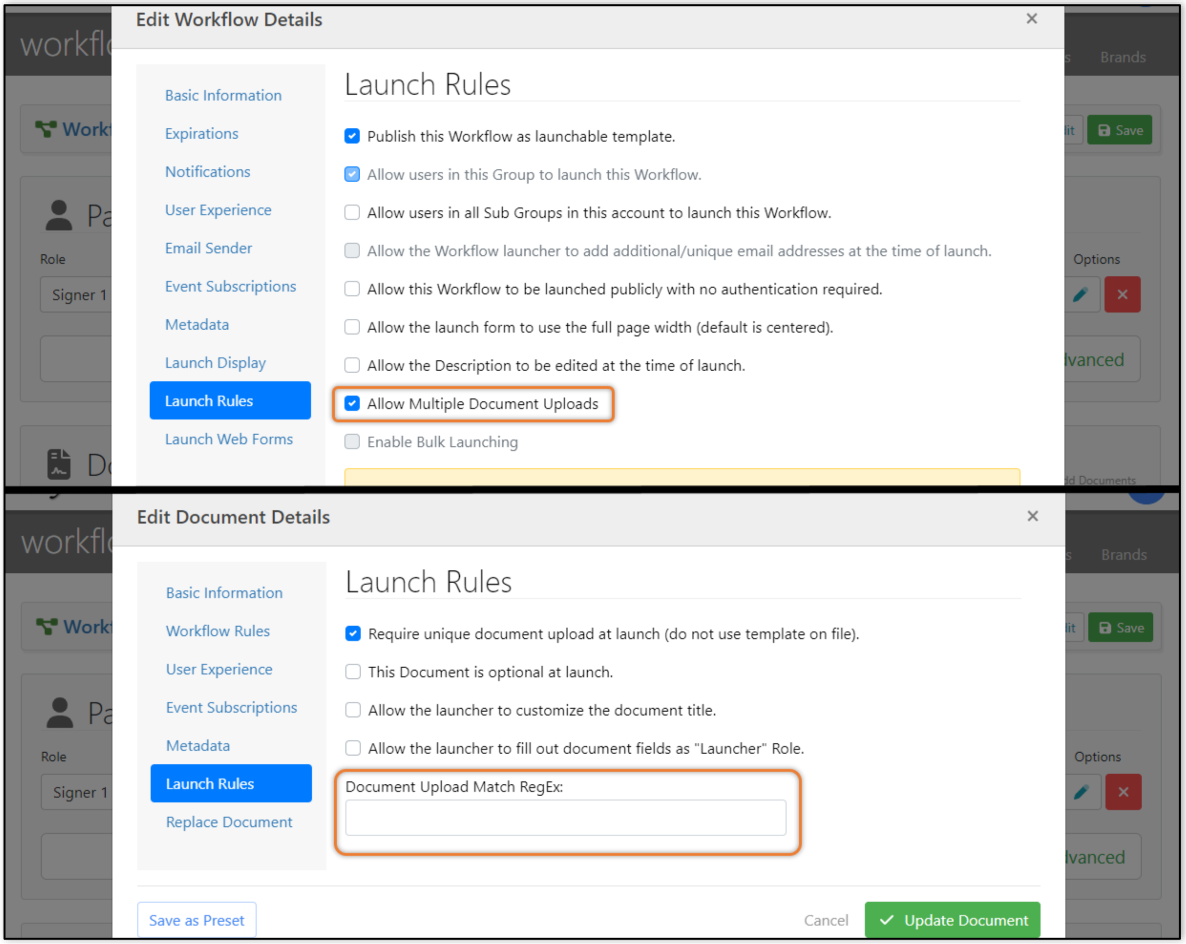


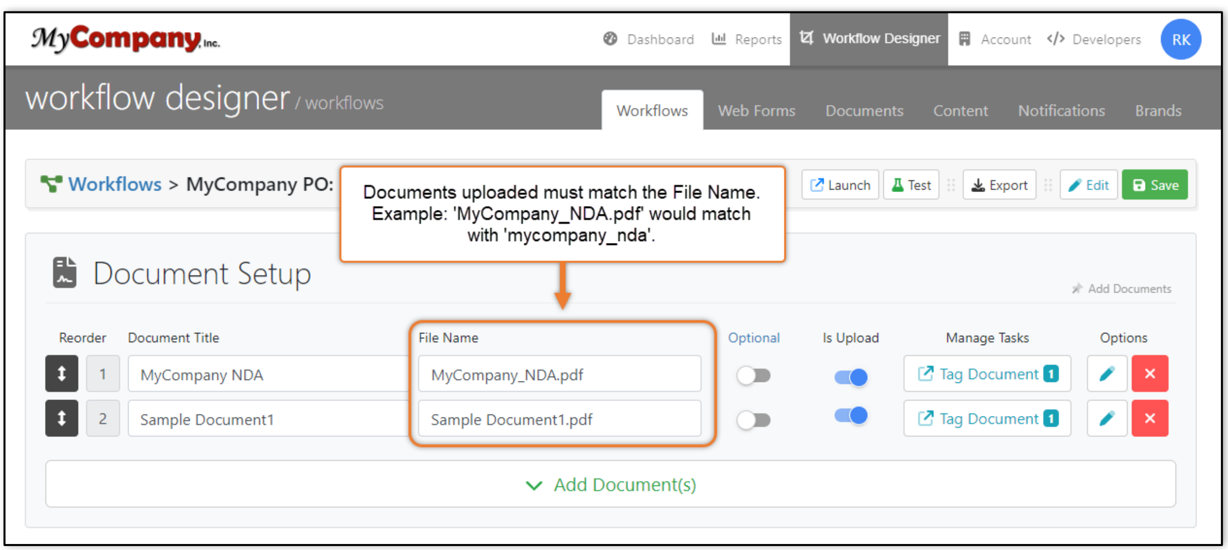
- **[PEP-7678]** ~Authentication

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

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

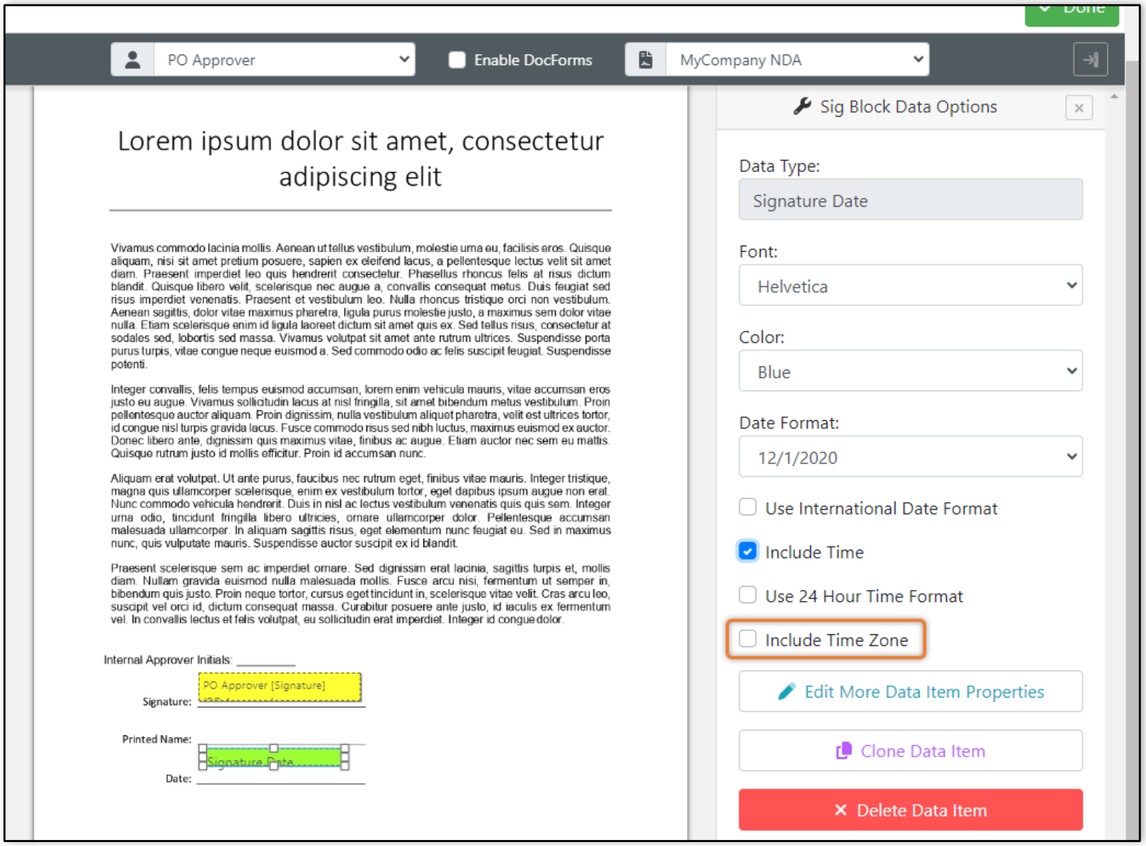
Fixed issue where when using the Multiple Document Uploads functionality, without RegEx, documents were required to match the File Name exactly (including the extension). Updated the file matching logic so that it will match the File Name field (minus the extension and ignoring case sensitivity) with 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.





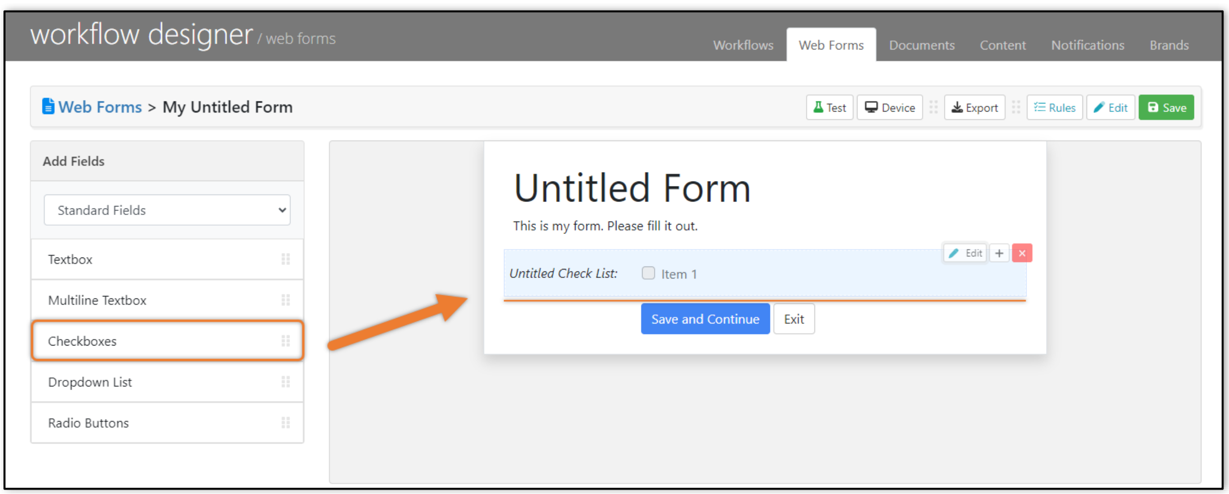
- **[PEP-7675]** ~Signatures ~Workflows

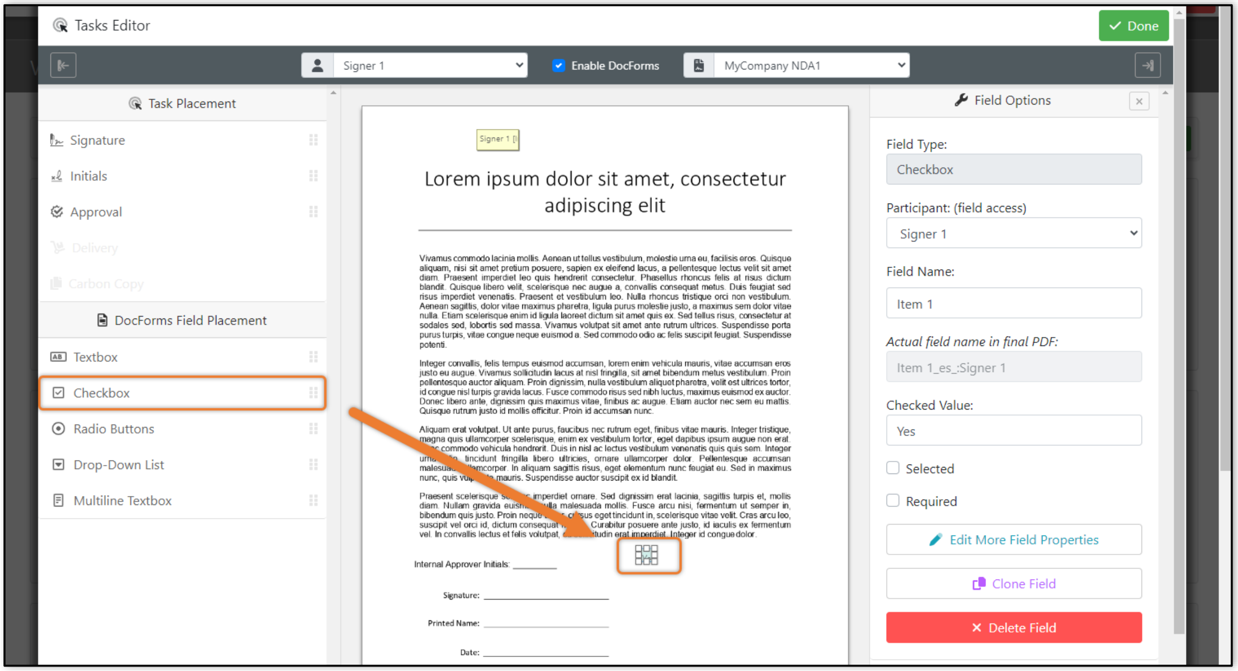
Fixed issue where a typo was seen in Signature Block Data. Please see the image below referencing the fixed typo.



- **[PEP-7669]** ~Documents

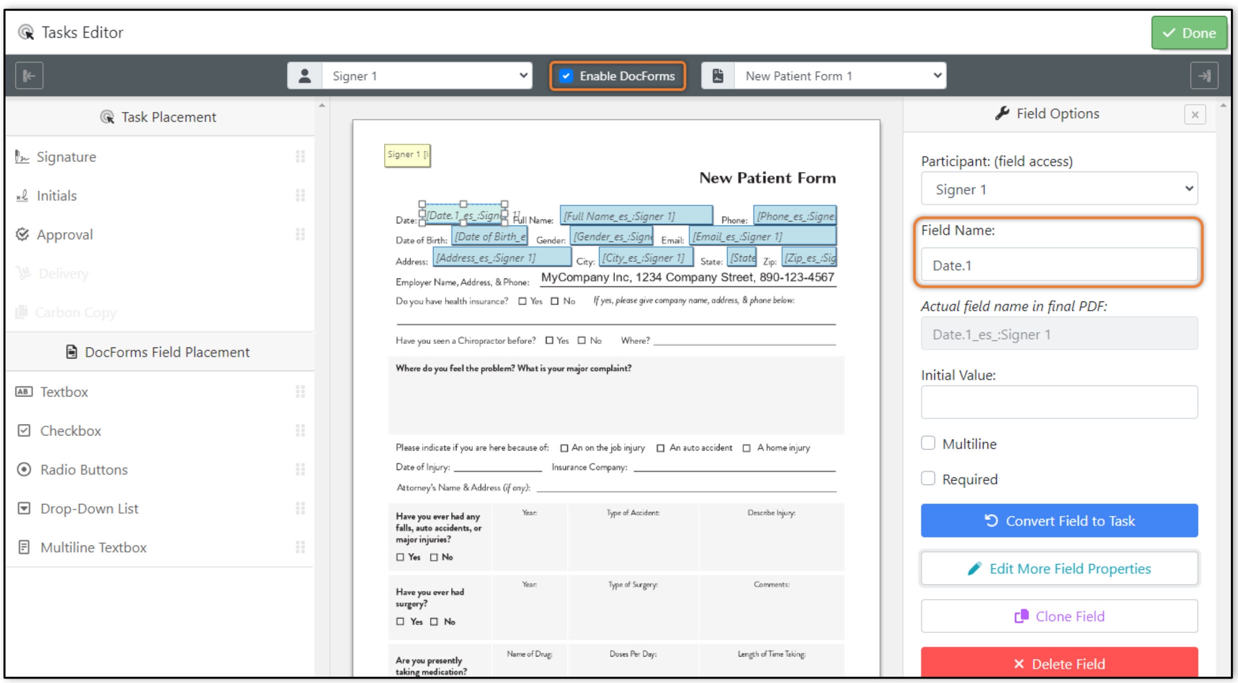
Fixed issue where certain scenarios may cause checkboxes to not properly uncheck when Participants revisit Web Forms and DocForms to update their selection before completing their assigned document tasks. Please see the images below for the referenced settings.





- **[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.

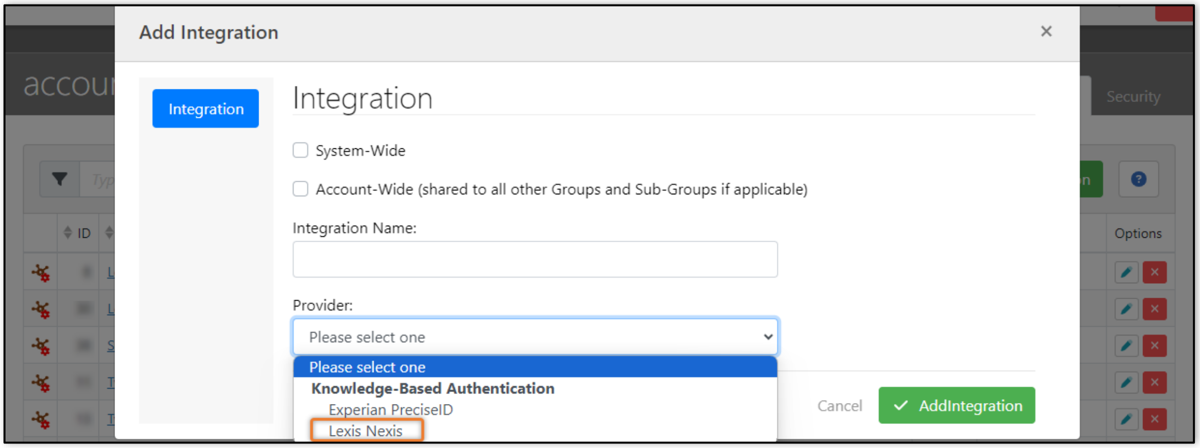


- **[PEP-7648]** ~Documents

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.

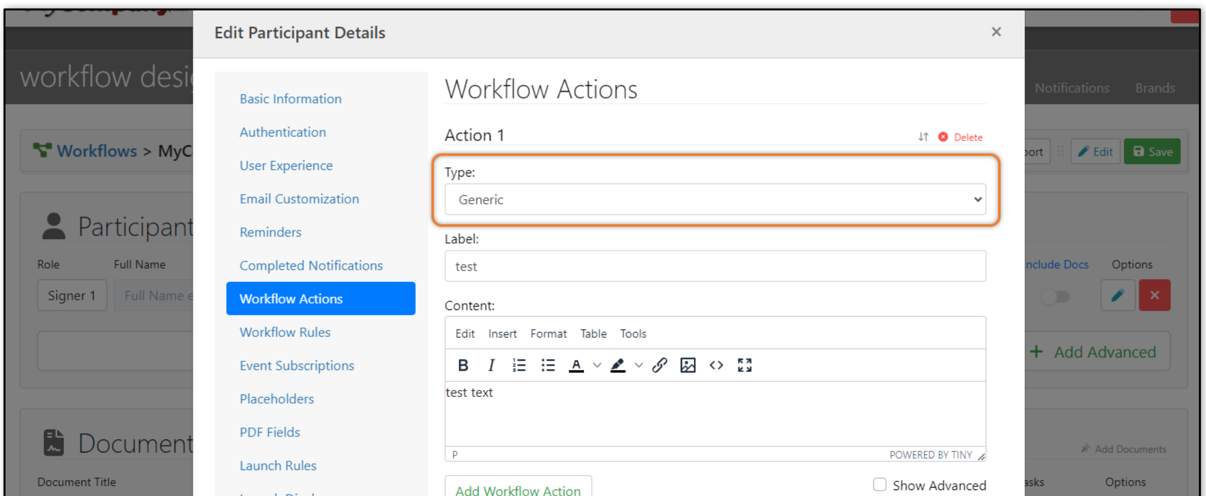
- **[PEP-7642]** ~Authentication ~Integrations

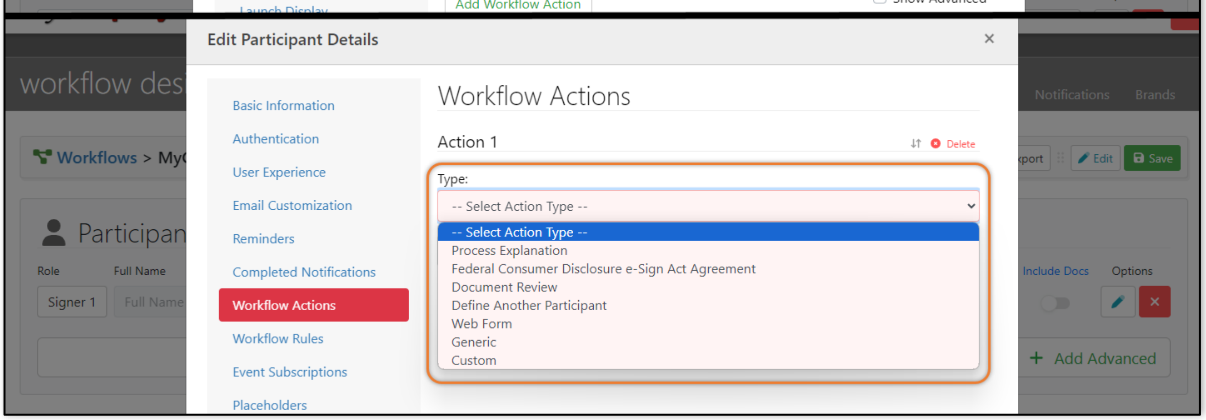
Fixed issue where Lexis Nexis “Match Data” functionality would not behave as expected when a match is not found. Instead of the user seeing a data mismatch error, no error is presented and the session expires right away.



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

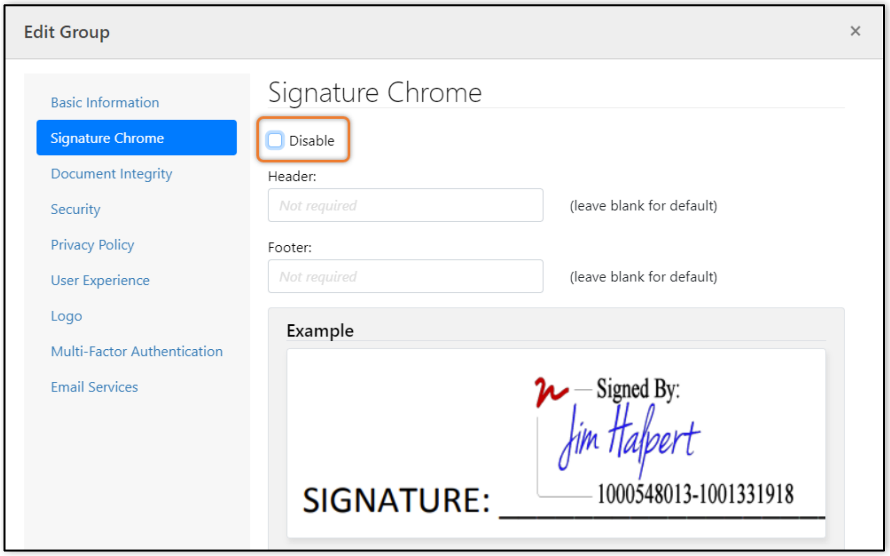
Fixed issue where changing a Workflow Action Type from Generic to a different type caused the workflow to not function properly. The Workflow Action would stay as Generic even though it was changed. Please see the image below for the referenced settings.





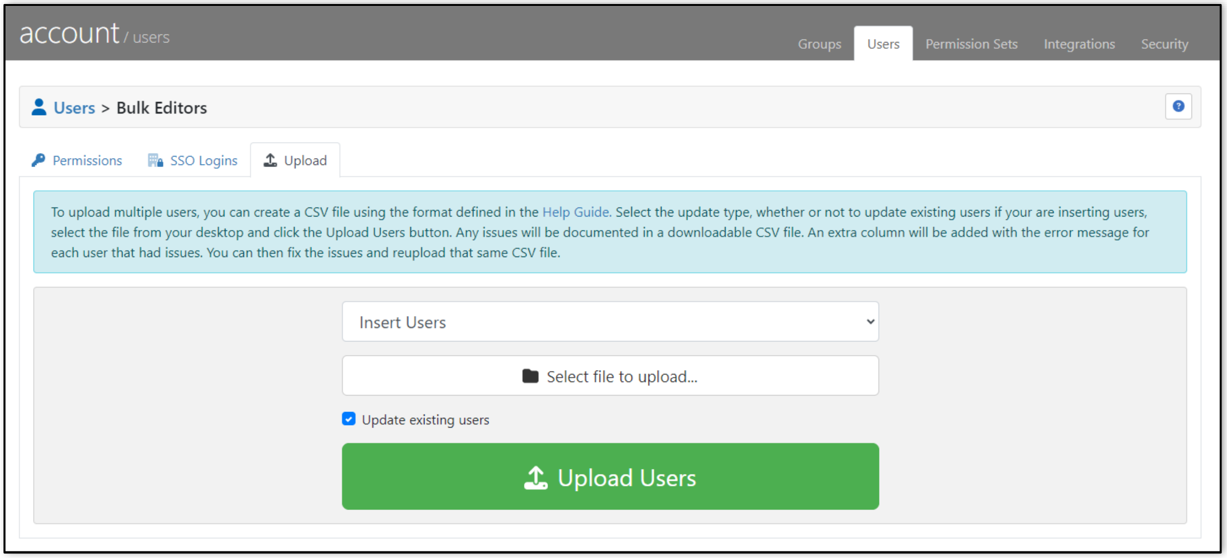
- **[PEP-7625]** ~Authentication ~Signatures ~Signing

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.



- **[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.

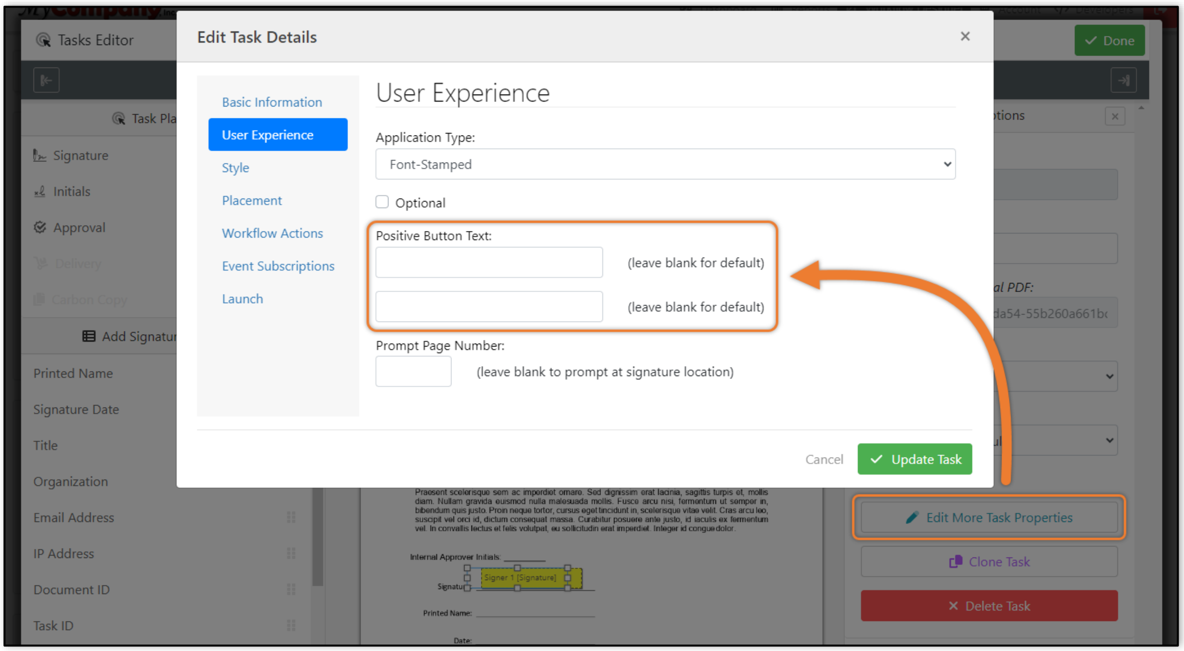


- **[PEP-7605]** ~Emails ~Transactions

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.

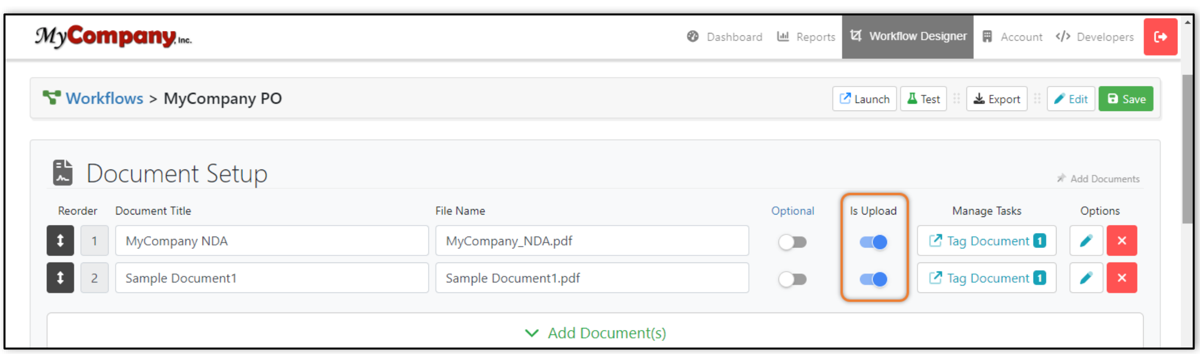
- **[PEP-7603]** ~UI/UX ~Workflows

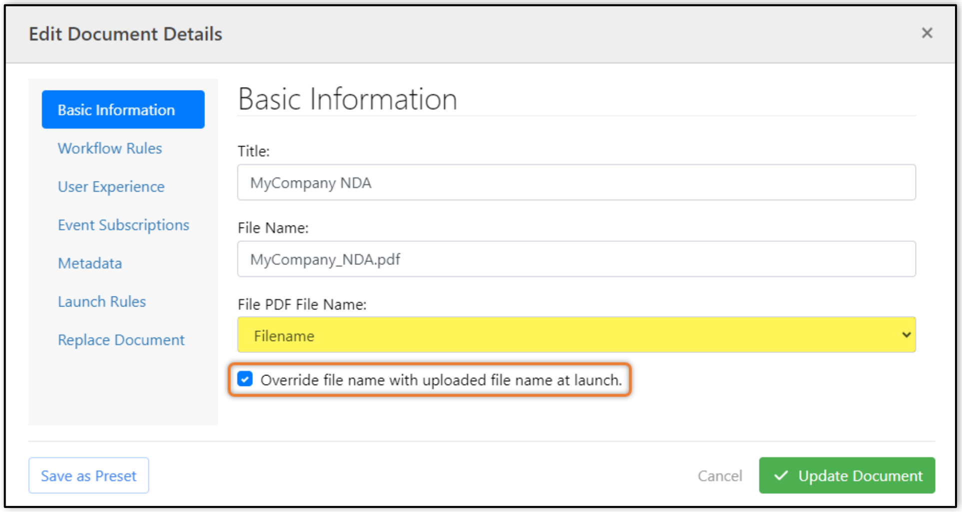
Fixed issue where the Negative Button Text: label was missing in the User Experience settings under Edit Task Details. Please see the image below of an example where the label was missing.



- **[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.



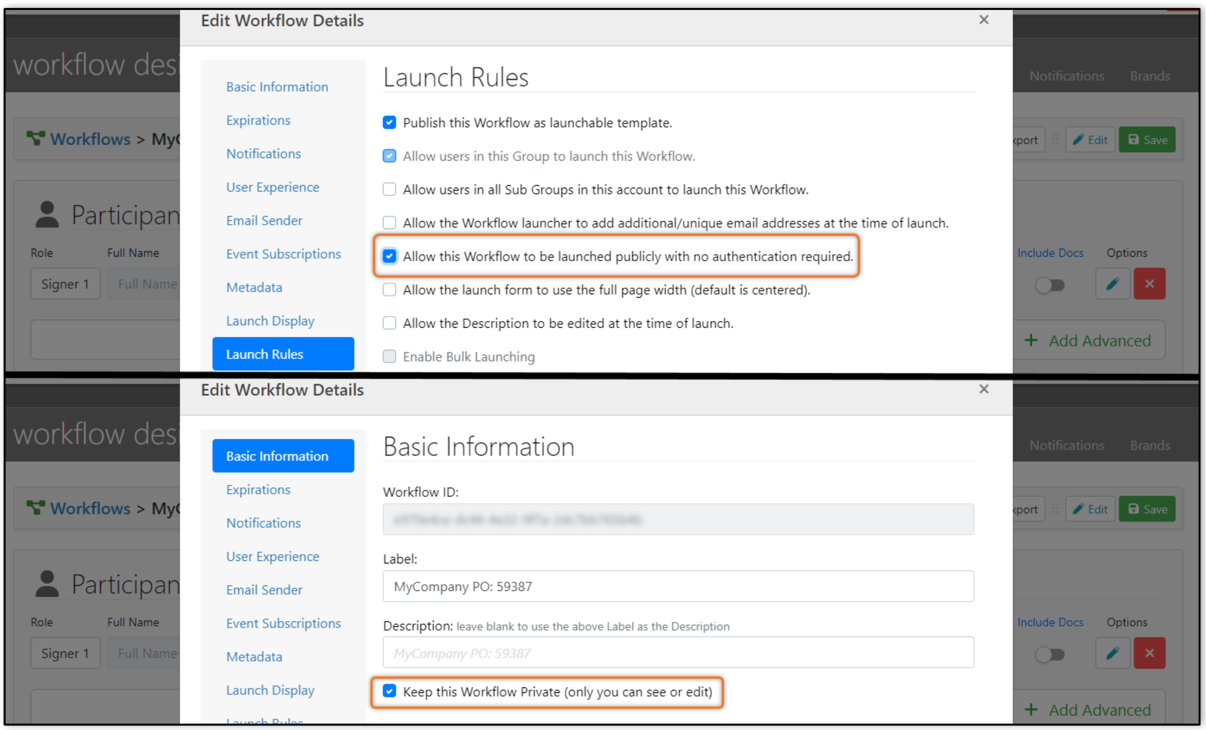


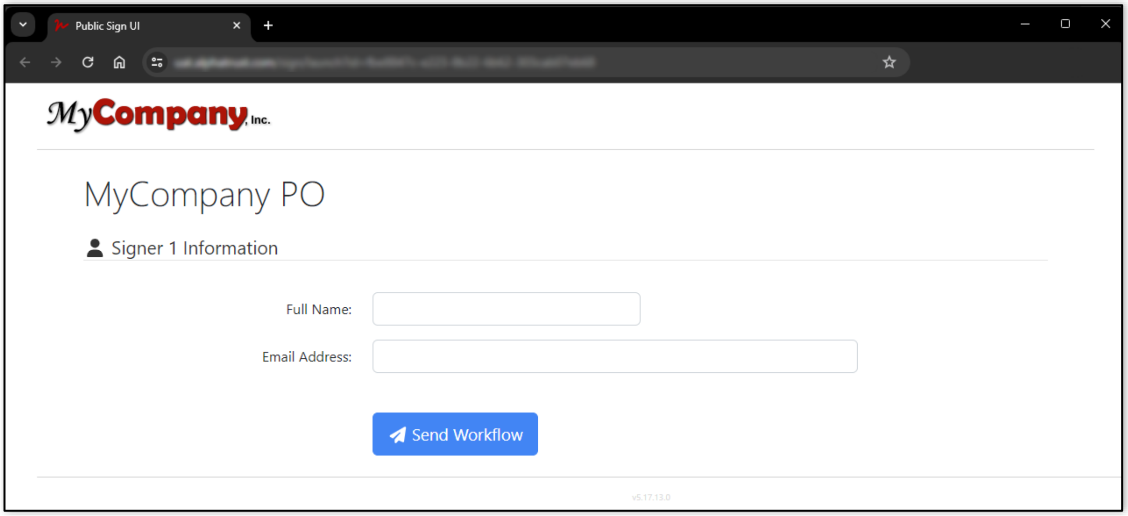
- **[PEP-7588]** ~Infrastructure ~Installer

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.



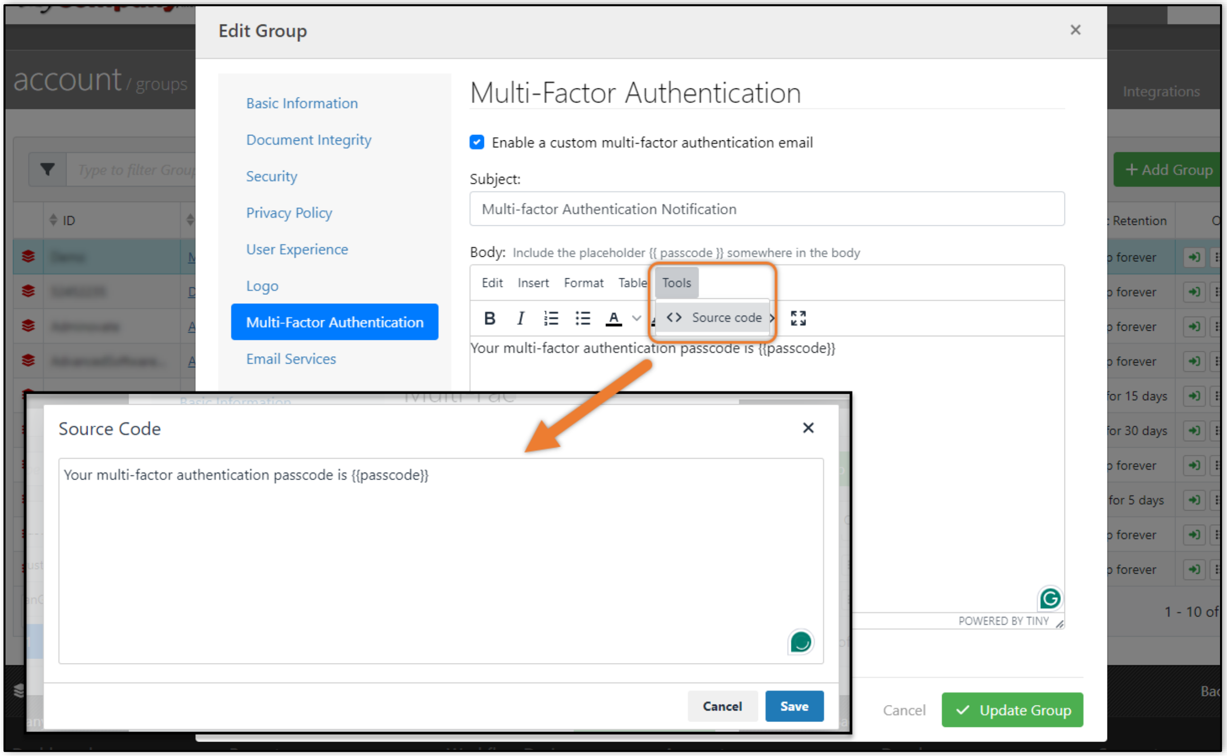


- **[PEP-7568]** ~ControlPanel ~Documents ~Workflows

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

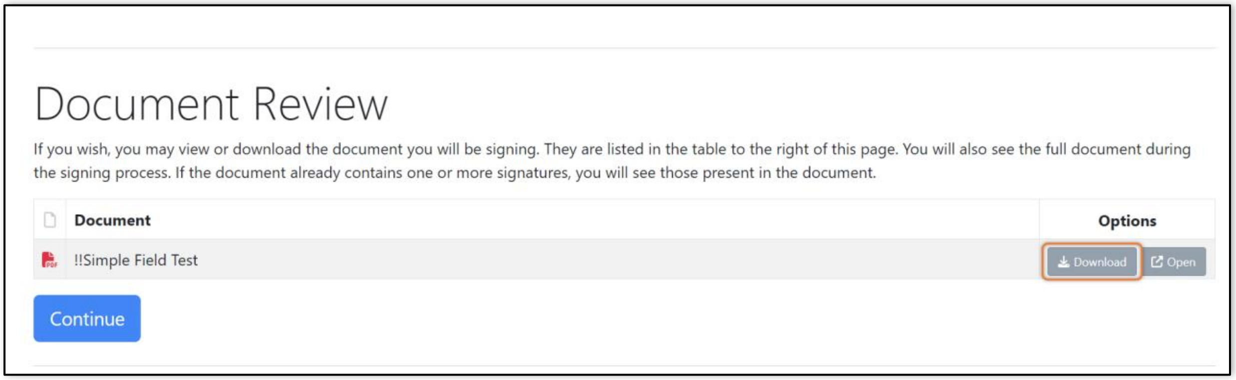
- **[PEP-7565]** ~ControlPanel ~Groups

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.



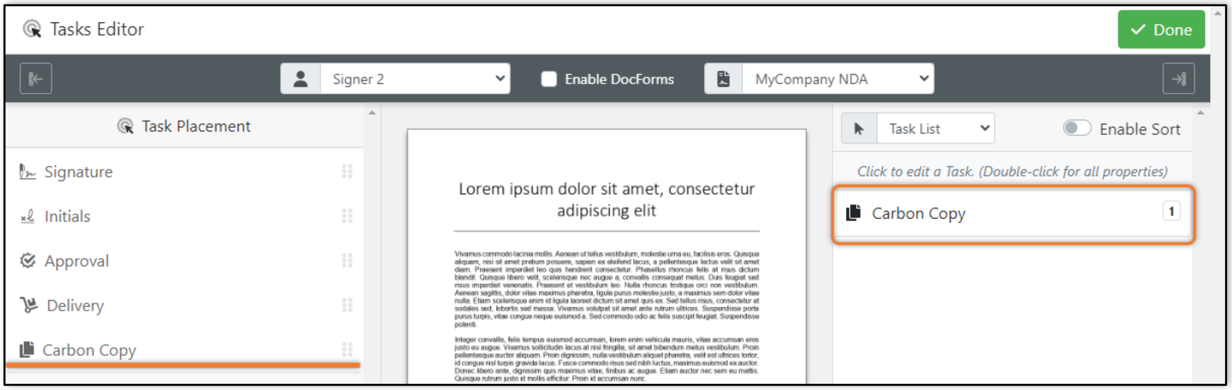
- **[PEP-7512]** ~UI/UX ~WorkflowActions

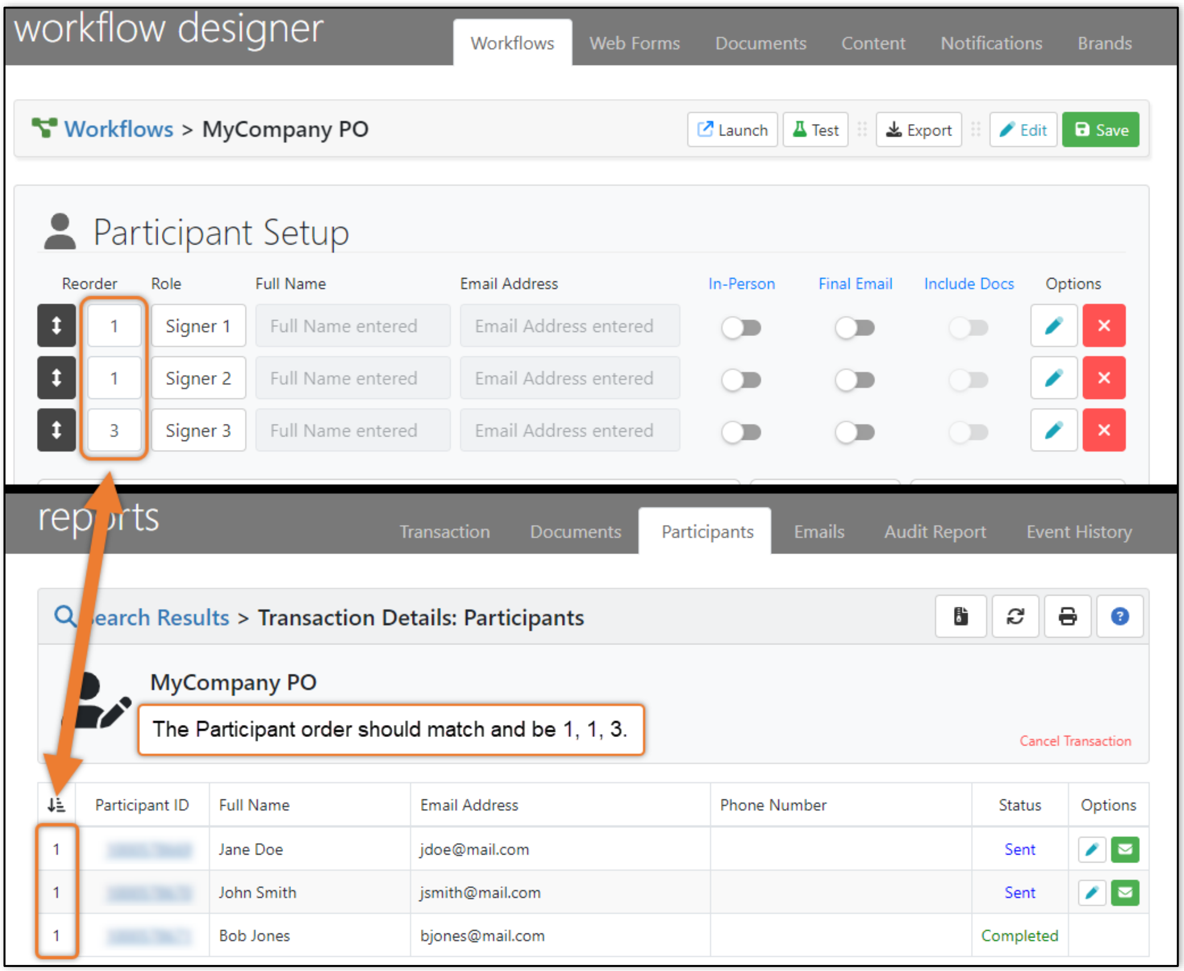
Fixed issue where the Download Button was not shown on the Document Review page. Please see the image below for more information.



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

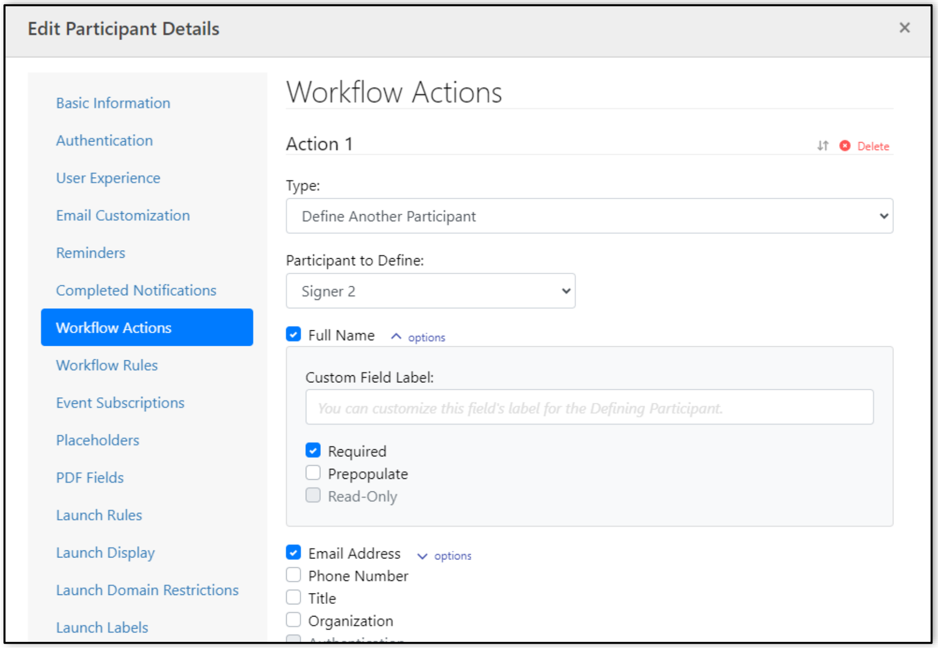
Fixed issue where the Participant's access order would be calculated incorrectly after the transaction is launched. This issue would only occur when the second participant had a carbon copy task assigned to them. Please see an example and referenced settings in the images below.





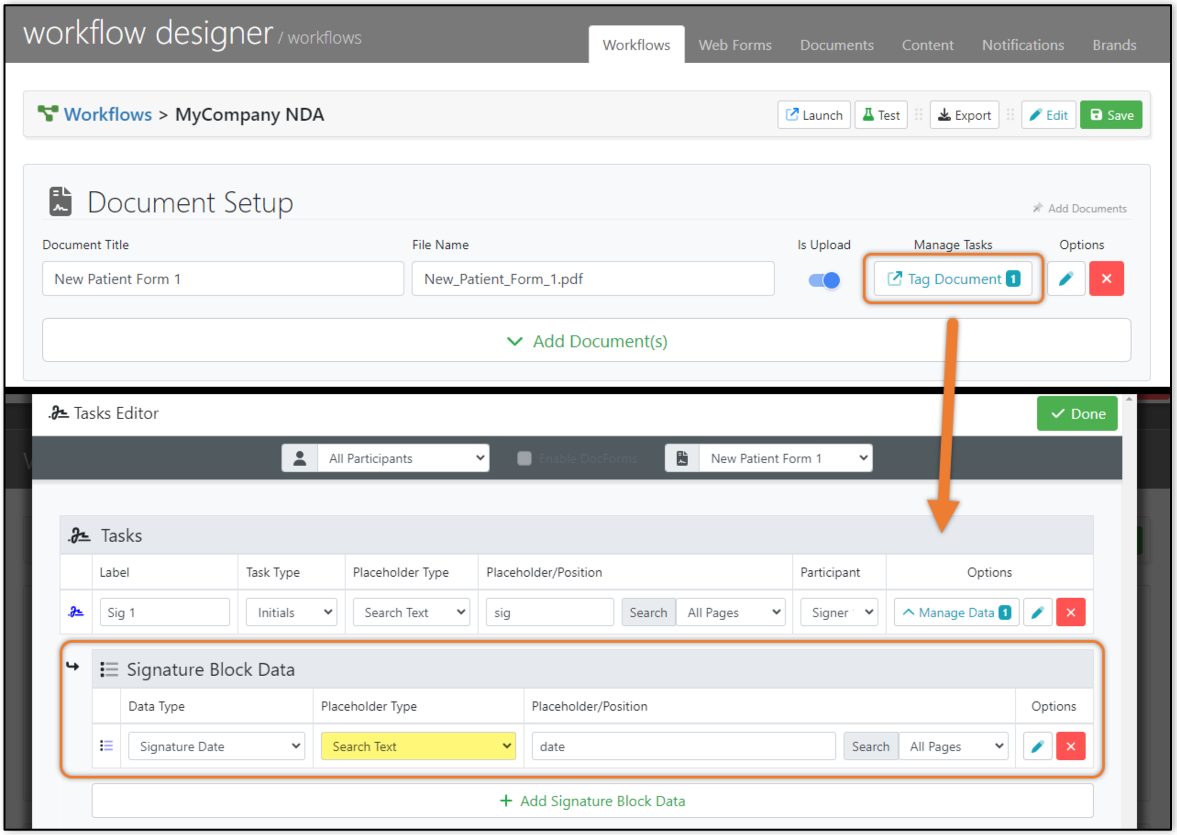
- **[PEP-7390]** ~Signatures ~WorkflowActions ~Workflows

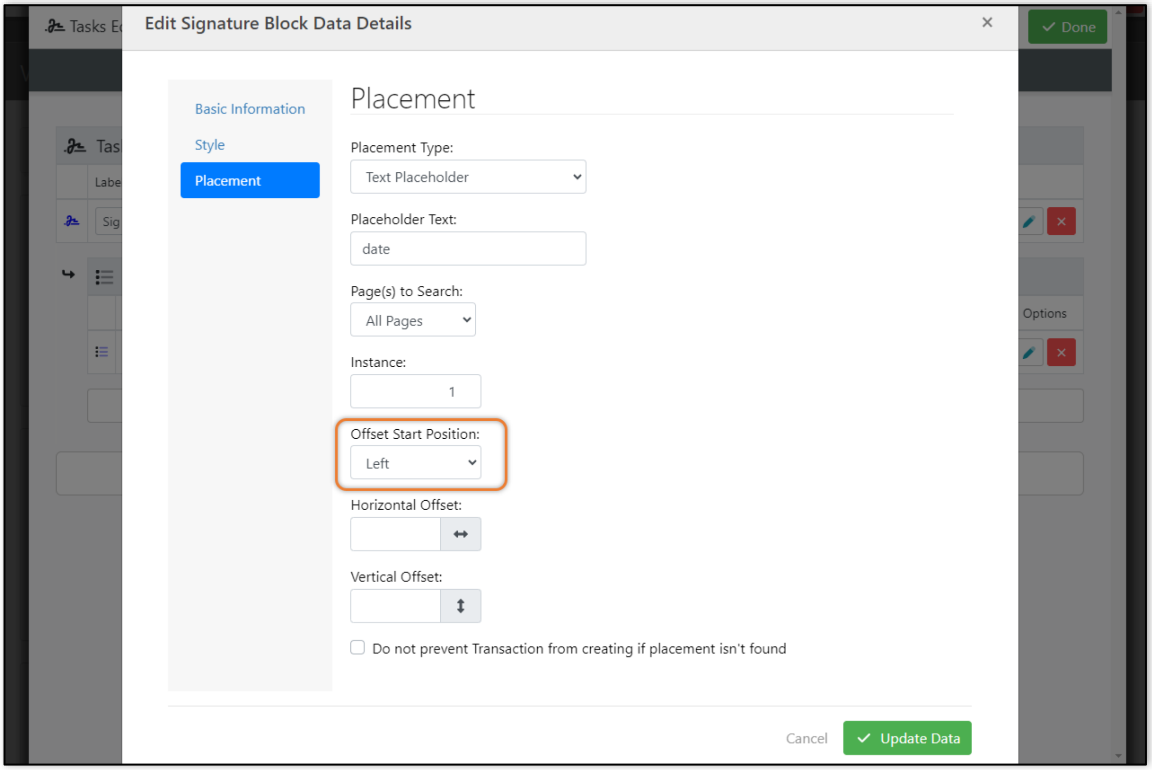
Fixed issue where a Participant could enter only a space character for the Full Name on the Define Participant workflow action. The validation for Full Name on the Define Participant Workflow Action will no longer accept only a space character. Please see the image below for the referenced settings.



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

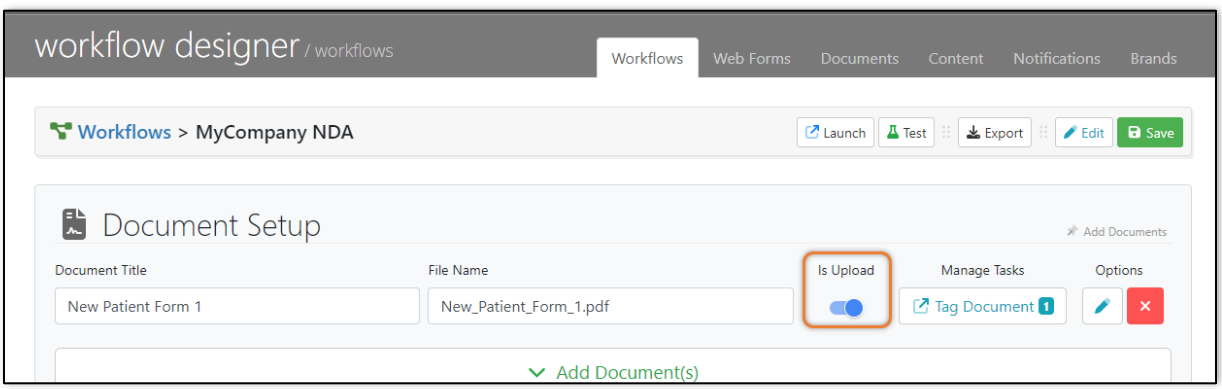
Fixed issue where Signature Block Data placement was not respecting the default Offset Start Position of "Left" for the Placeholder Type Search Text. Please see the images below for additional details and the settings referenced.

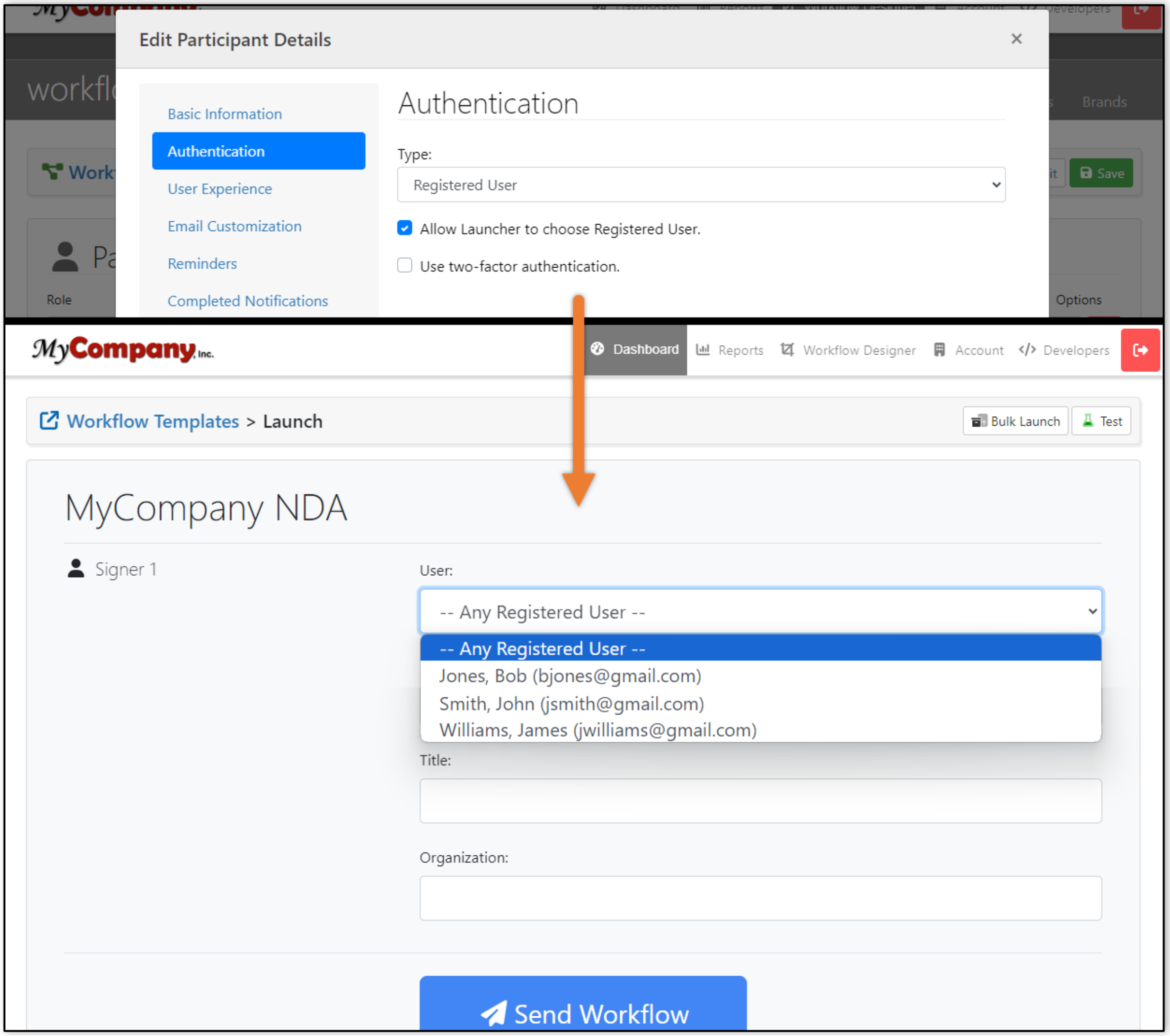




- **[PEP-6292]** ~Users ~Workflows

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.



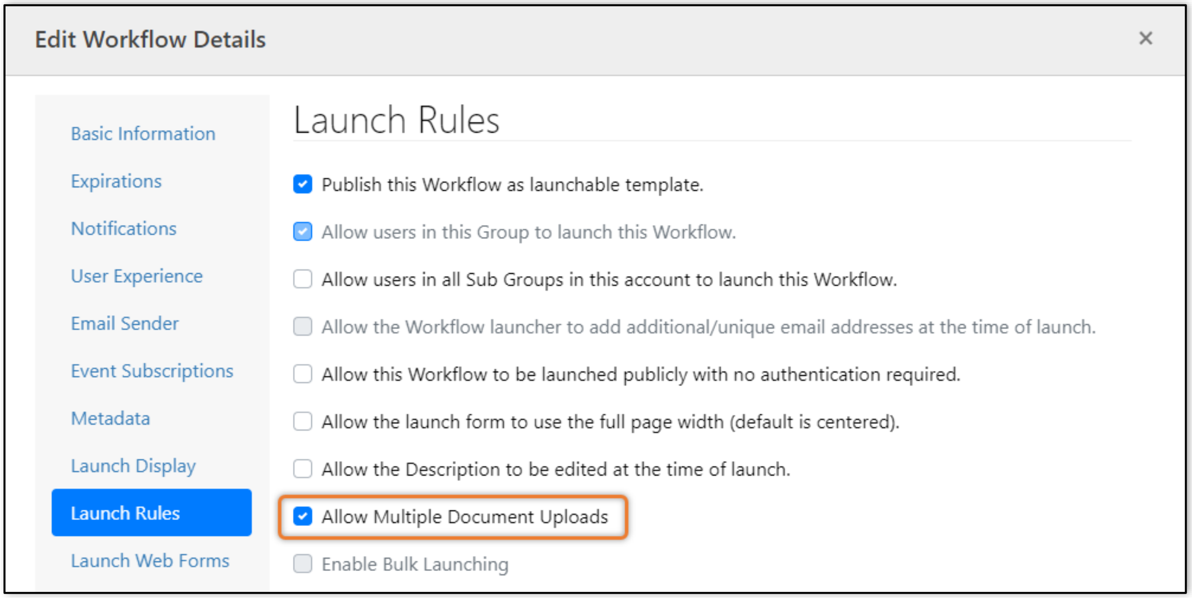


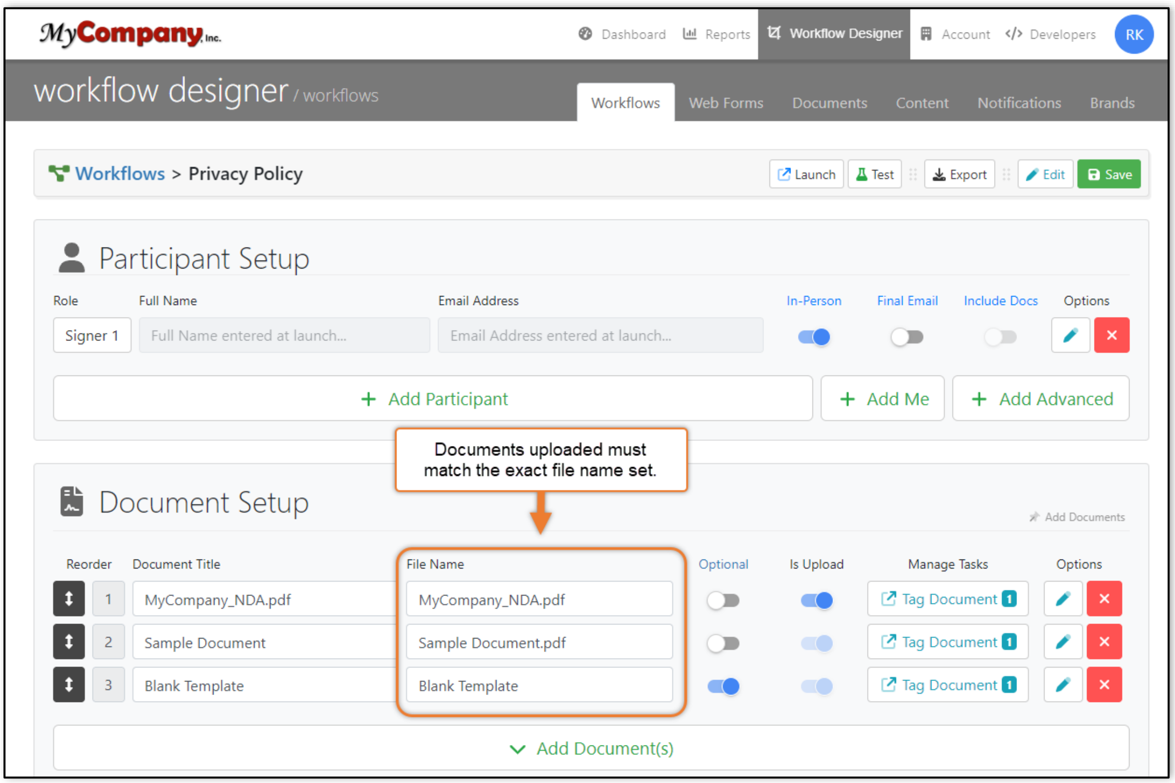
v5.18.0 Release *Release Date: 3/7/2024*

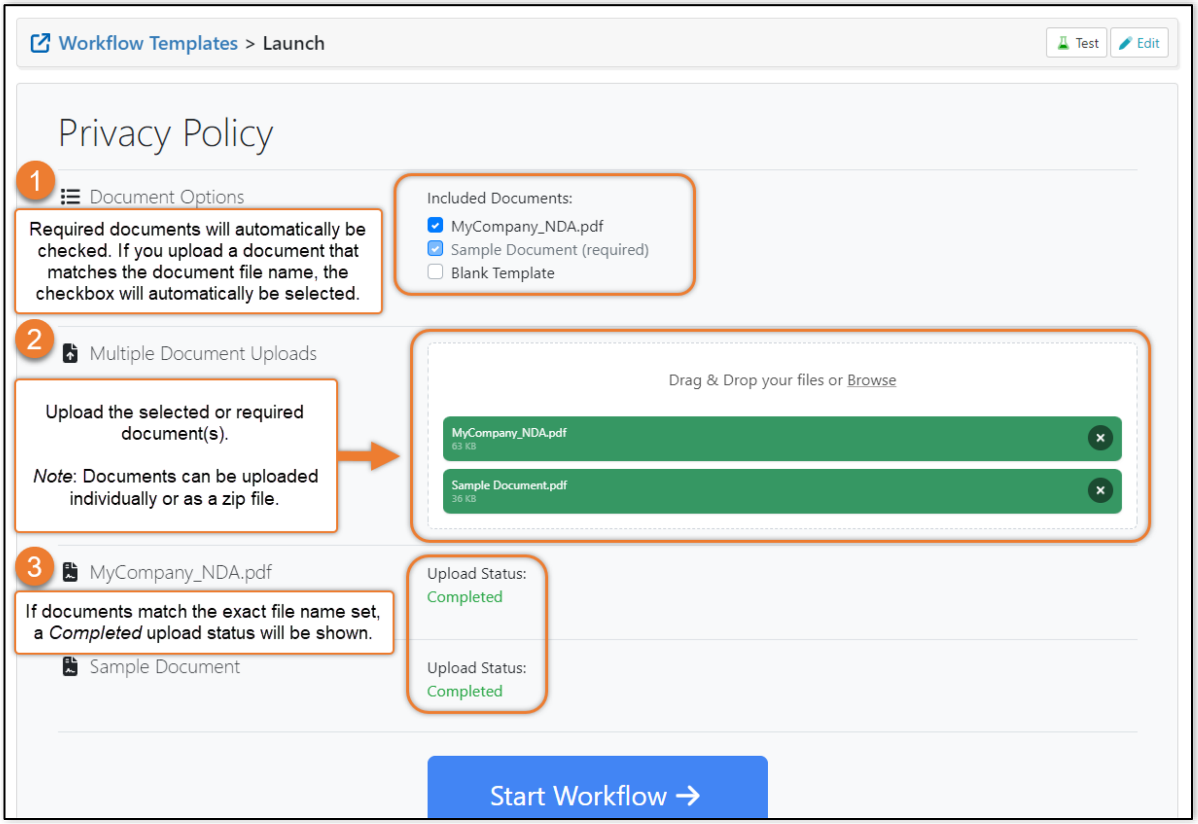
New Features

- **[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.

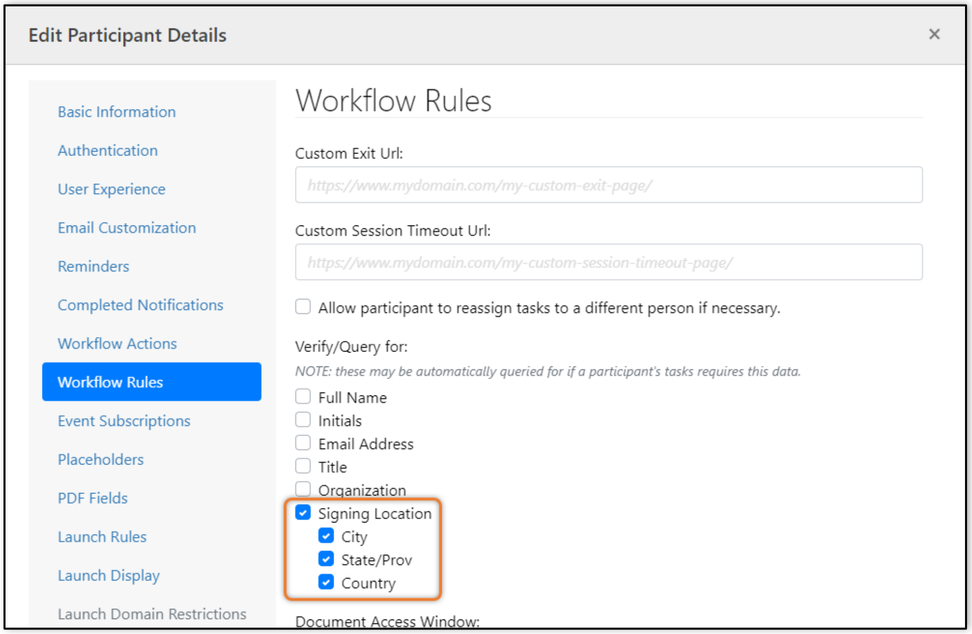

Edit Workflow Details
Basic Information
Expirations
Notifications
User Experience
Email Sender
Event Subscriptions
Metadata
Launch Display
Launch Rules
Launch Web Forms
Launch Rules
Publish this Workflow as launchable template.
Allow users in this Group to launch this Workflow.
Allow users in all Sub 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

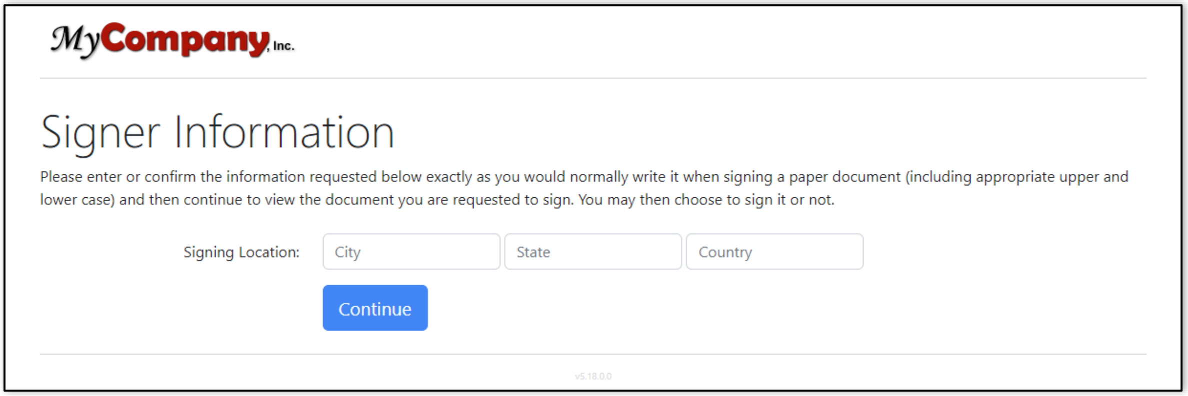

MyCompany Inc.
Dashboard
Reports
Workflow Designer
Account
Developers
RK
workflow designer / workflows
Workflows
Web Forms
Documents
Content
Notifications
Brands
Workflows > Privacy Policy
Launch
Test
Export
Edit
Save
Participant Setup
Role
Full Name
Email Address
In-Person
Final Email
Include Docs
Options
Signer 1
Full Name entered at launch...
Email Address entered at launch...
Add Participant
Add Me
Add Advanced
Documents uploaded must match the exact file name set.
Document Setup
Add Documents
Reorder
Document Title
File Name
Optional
Is Upload
Manage Tasks
Options
1
MyCompany_NDA.pdf
MyCompany_NDA.pdf
Tag Document
2
Sample Document
Sample Document.pdf
Tag Document
3
Blank Template
Blank Template
Tag Document
Add Document(s)

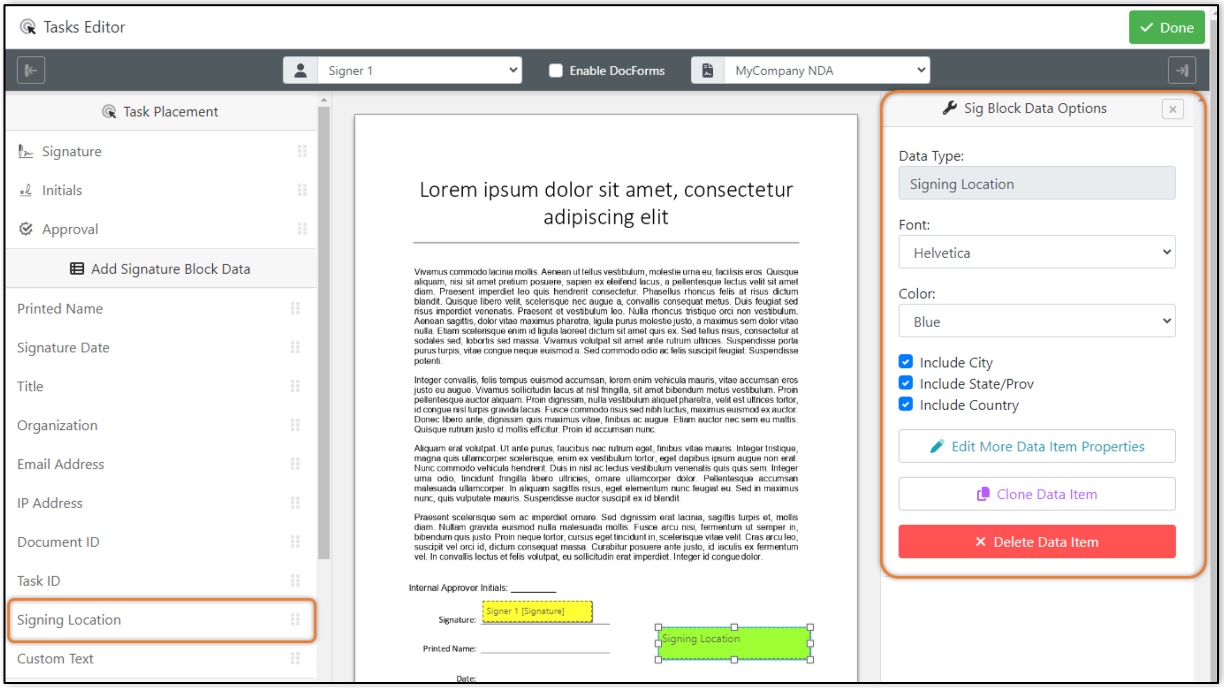


- **[PEP-7479]** ~API/WebServices ~Signing

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.

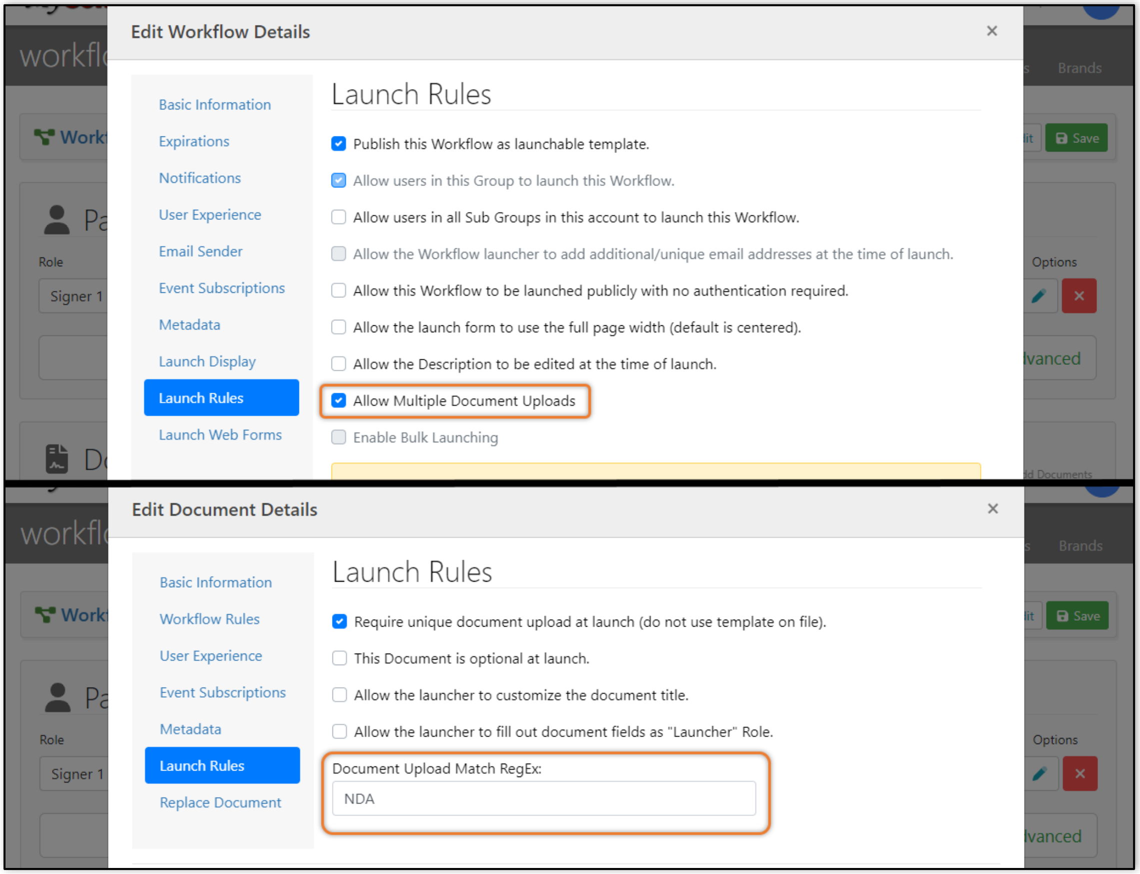


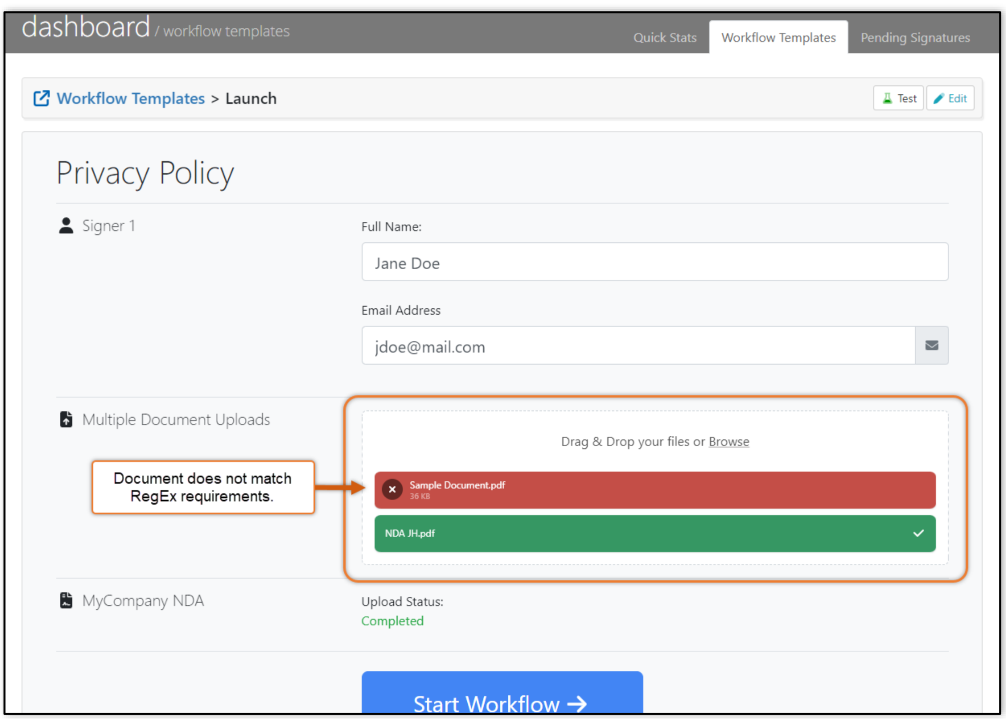




- **[PEP-7448]** ~Documents ~UI/UX ~Workflows

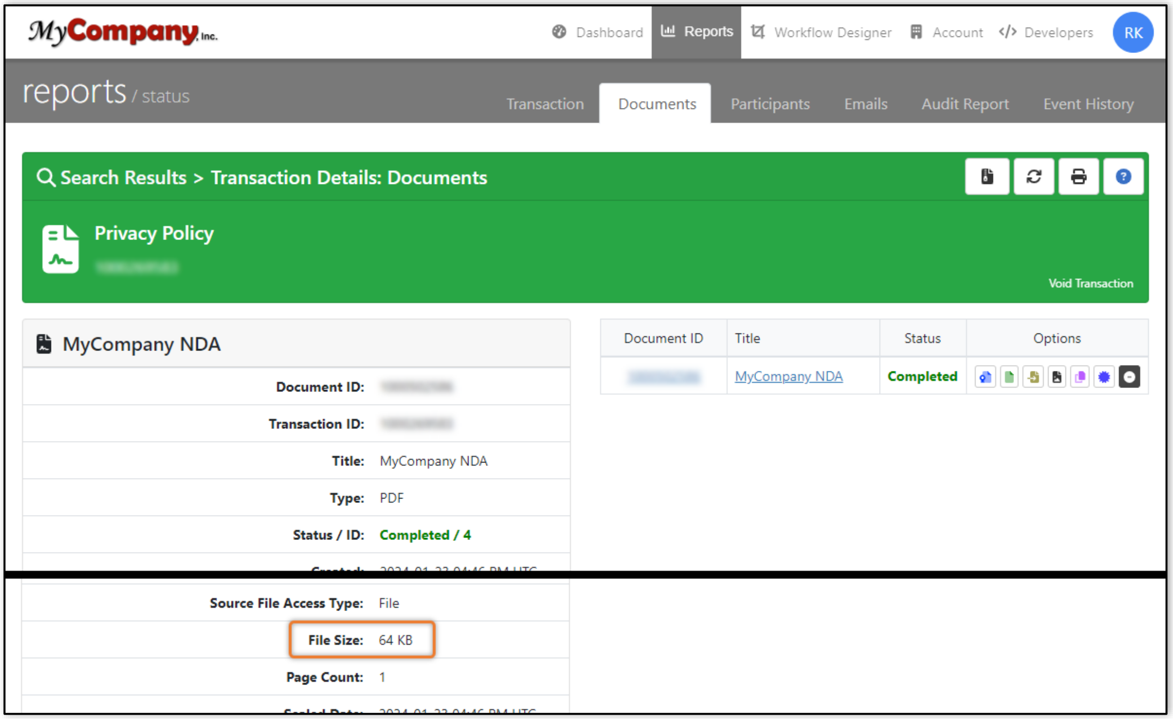
Added the ability to enable bulk document uploads in which the system will match files based on file name or custom regex set. Please see the images below for an example and the settings referenced.


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

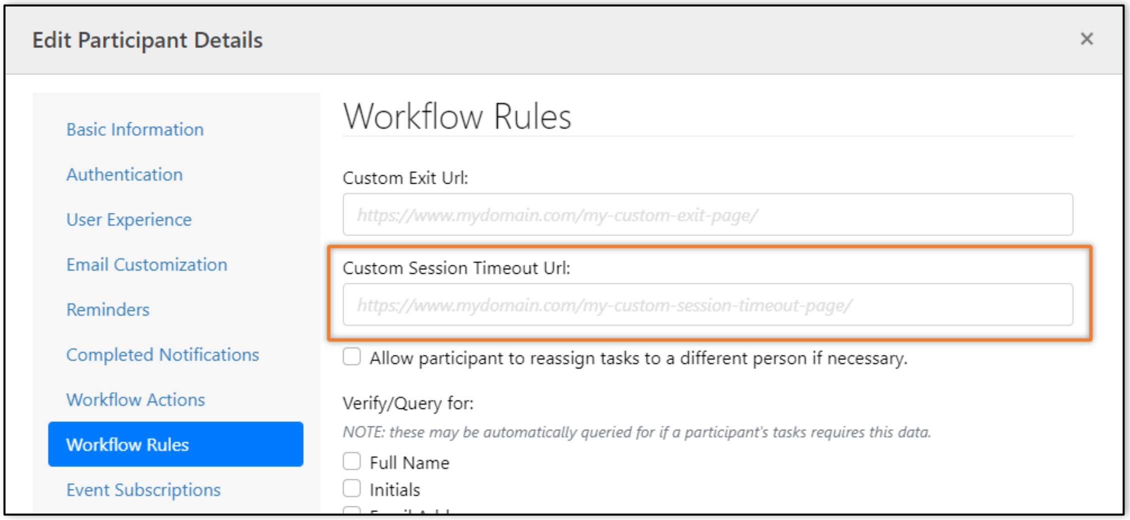
- **[PEP-7382]** ~Documents ~Logging

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.



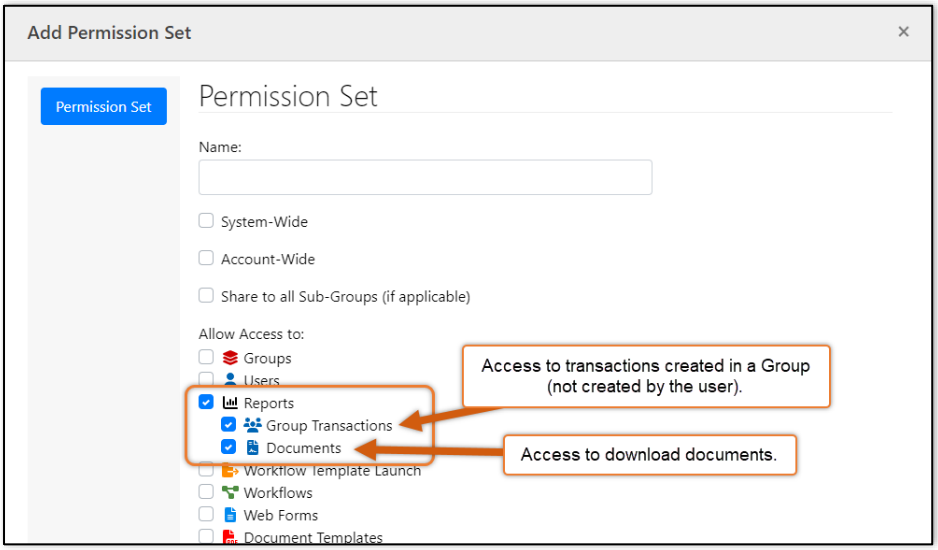
- **[PEP-7374]** ~Signing

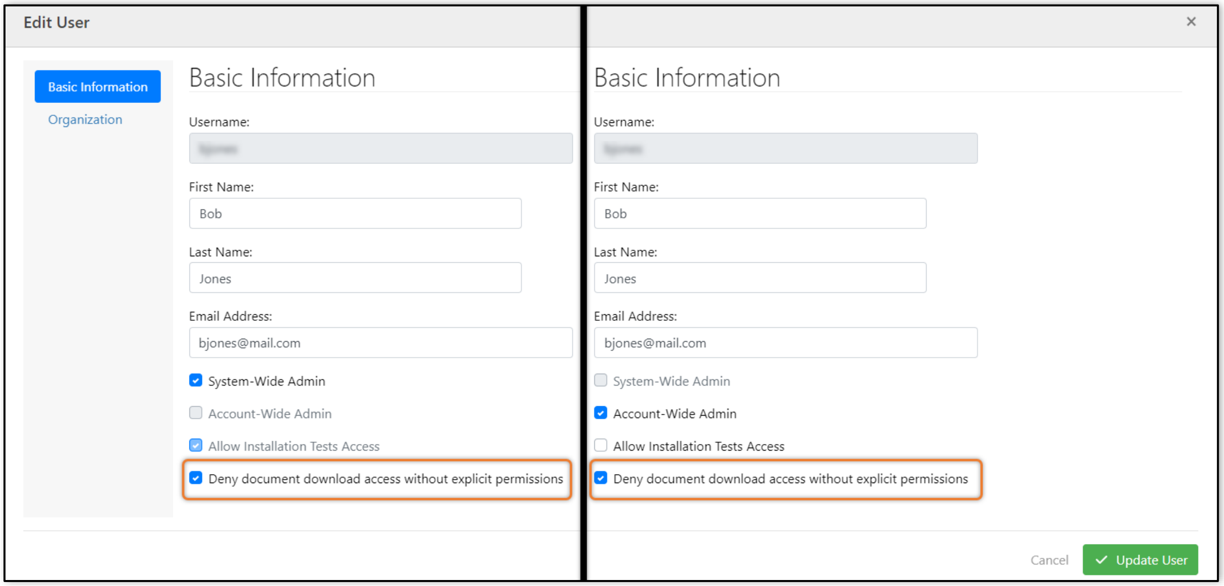
Added an option to route a Participant to a 'Custom Session Timeout URL'. Added a SessionTimeoutUrl parameter to the Participant (Workflows and API) so the Participant can be redirected to a custom web page when their signing session expires. Please see the image below for more information.



- **[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.

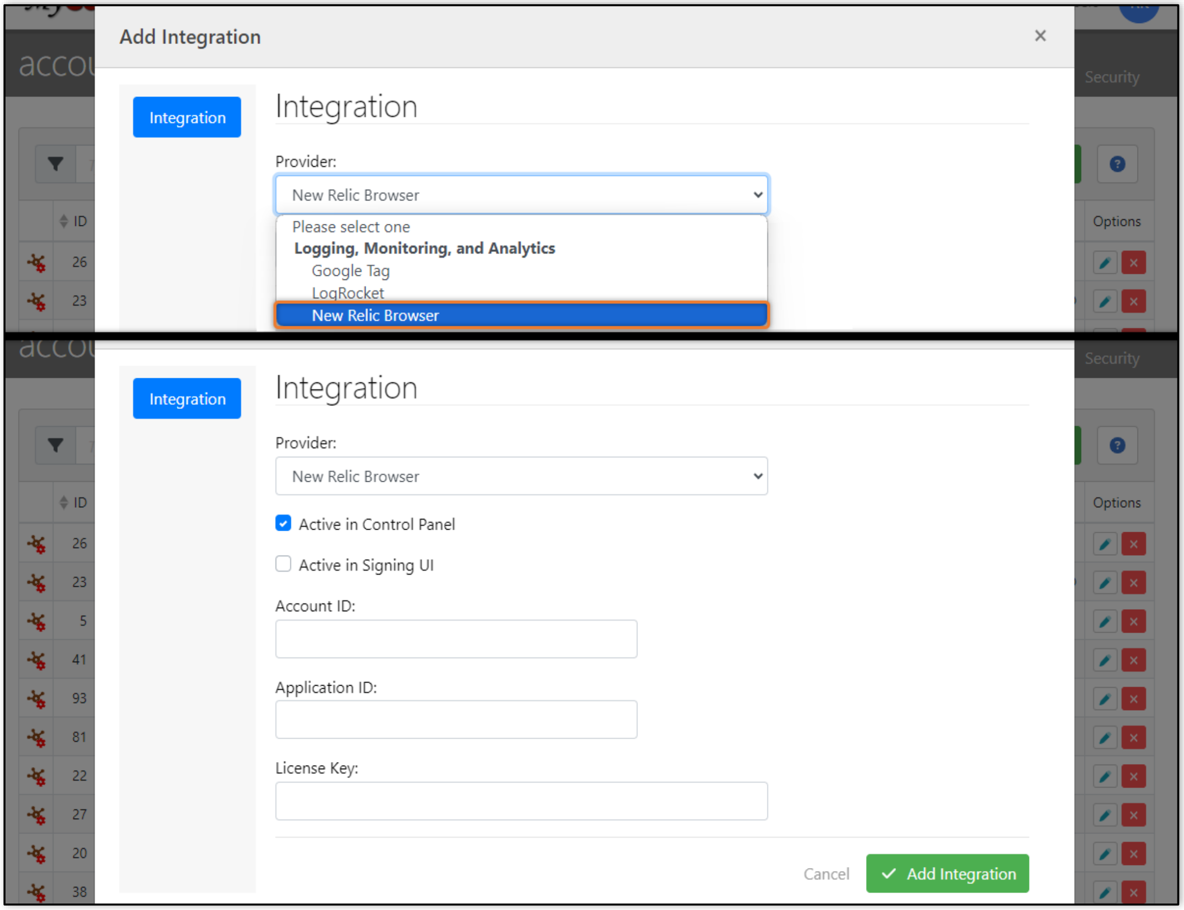




- **[PEP-7190]** ~Integrations ~Logging

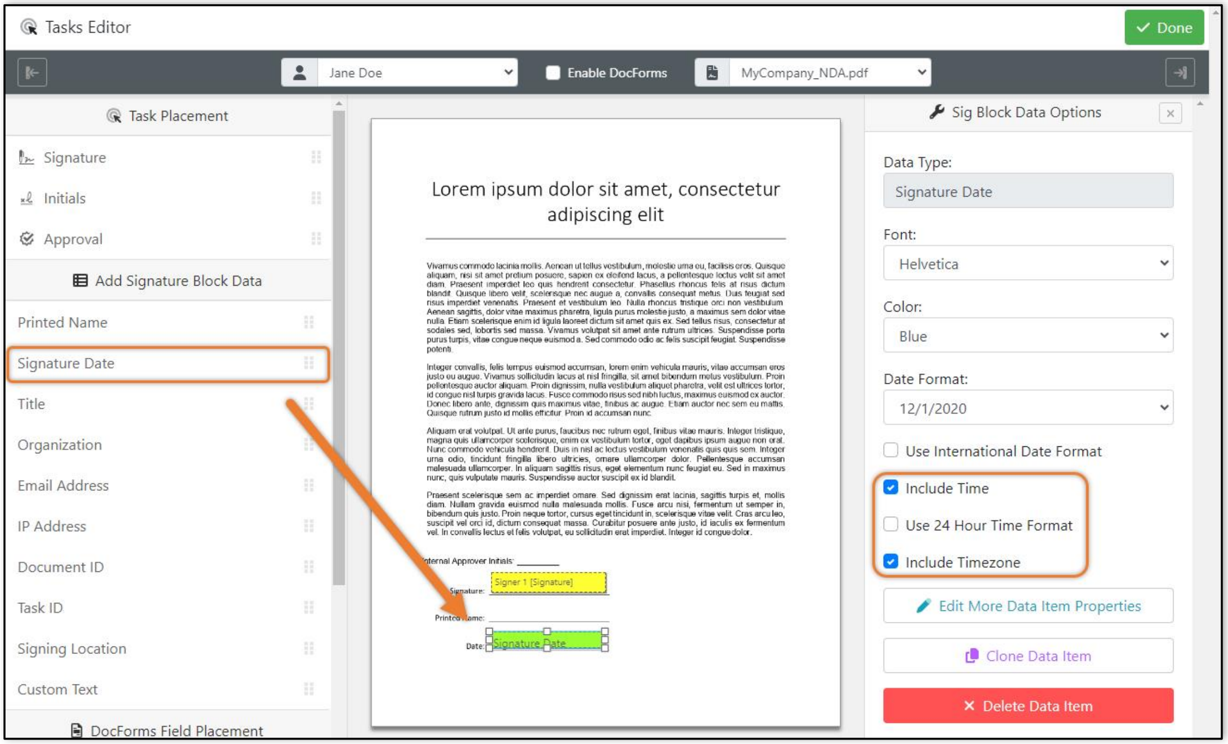
Added *New Relic* Browser Integration. This integration adds additional monitoring and logging through New Relic. Please see the image and link below for more details.

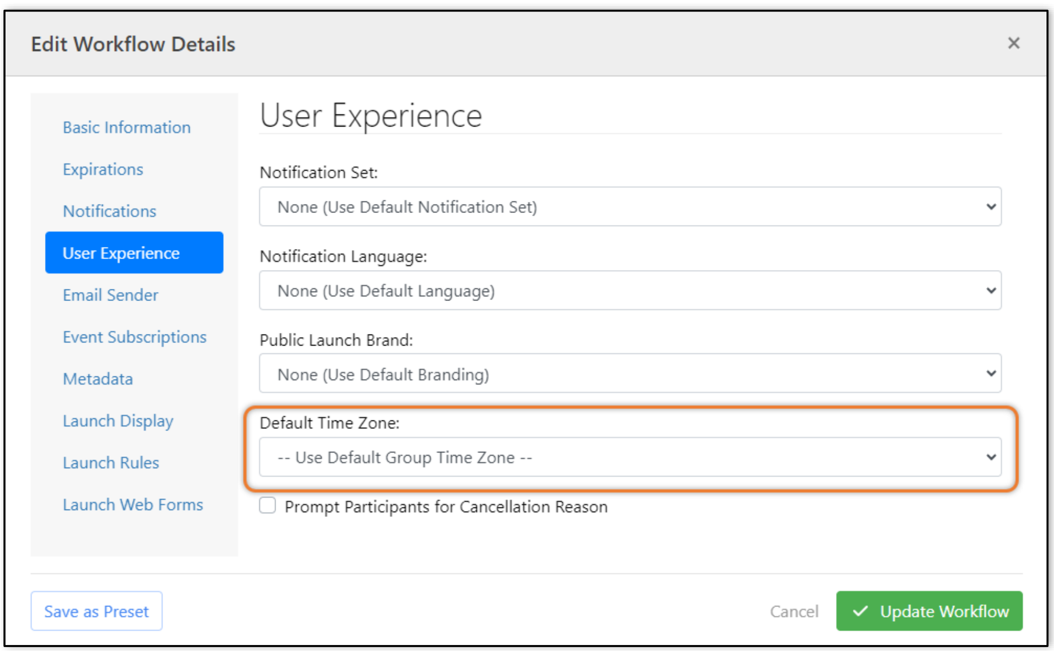
  - New Relic Browser Monitoring Information: https://docs.newrelic.com/docs/browser/browser-monitoring/getting-started/introduction-browser-monitoring/

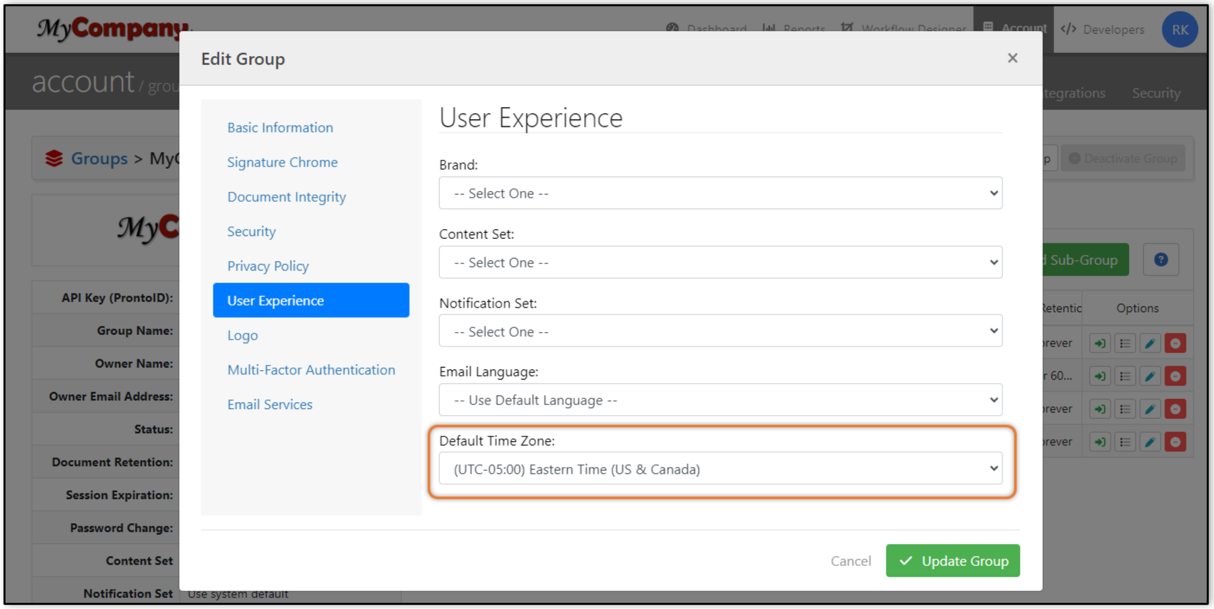


- **[PEP-7050]** ~API/WebServices ~ControlPanel ~Reports ~Signatures

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.

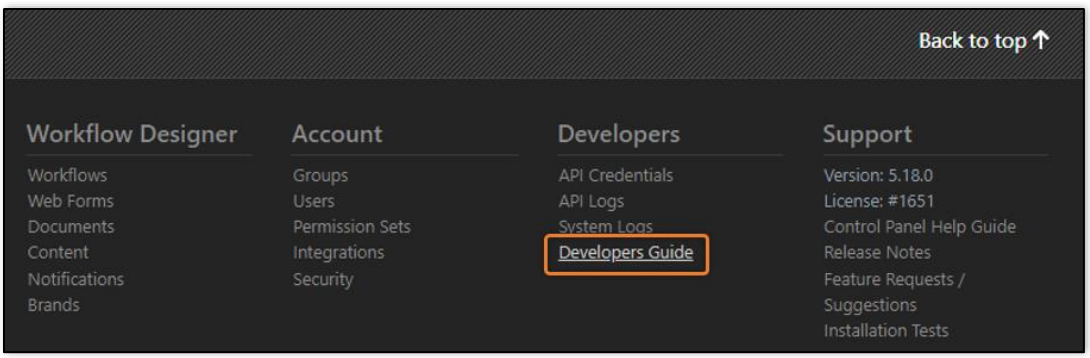

Tasks Editor
Done
Jane Doe
Enable DocForms
MyCompany_NDA.pdf
Task Placement
Signature
Initials
Approval
Add Signature Block Data
Printed Name
Signature Date
Title
Organization
Email Address
IP Address
Document ID
Task ID
Signing Location
Custom Text
DocForms Field Placement
Lorem ipsum dolor sit amet, consectetur adipiscing elit
Signer 1 [Signature]
Signature Date
Sig Block Data Options
Data Type:
Signature Date
Font:
Helvetica
Color:
Blue
Date Format:
12/1/2020
Use International Date Format
Include Time
Use 24 Hour Time Format
Include Timezone
Edit More Data Item Properties
Clone Data Item
Delete Data Item


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.



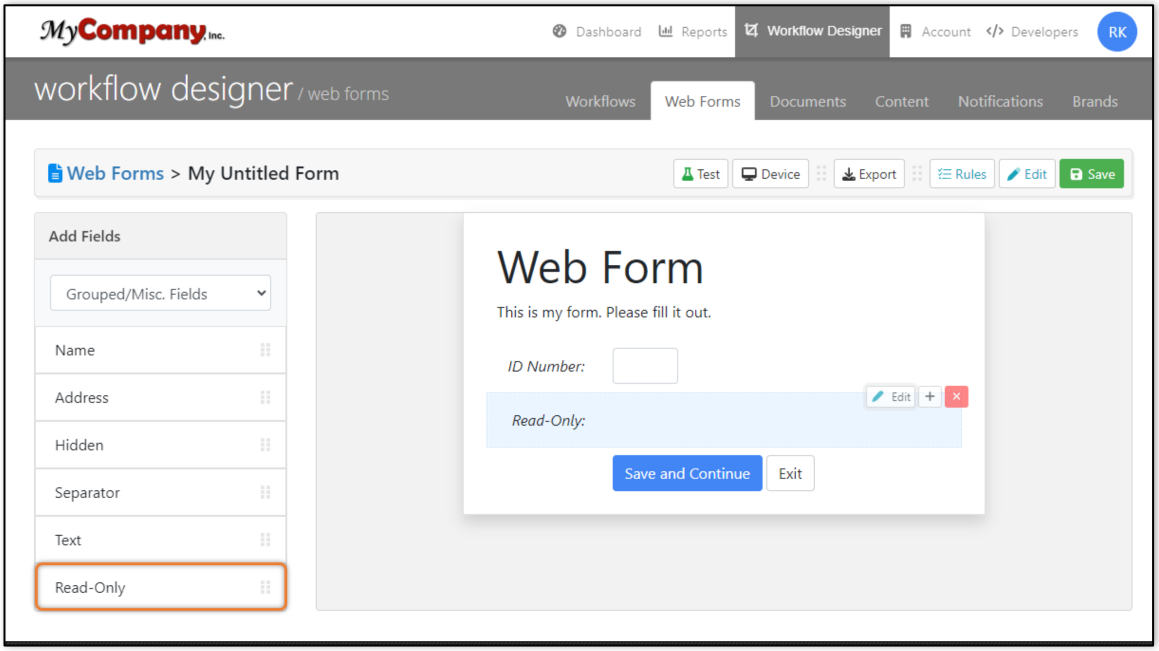
- **[PEP-6708]** ~Infrastructure ~Integrations

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
},
```

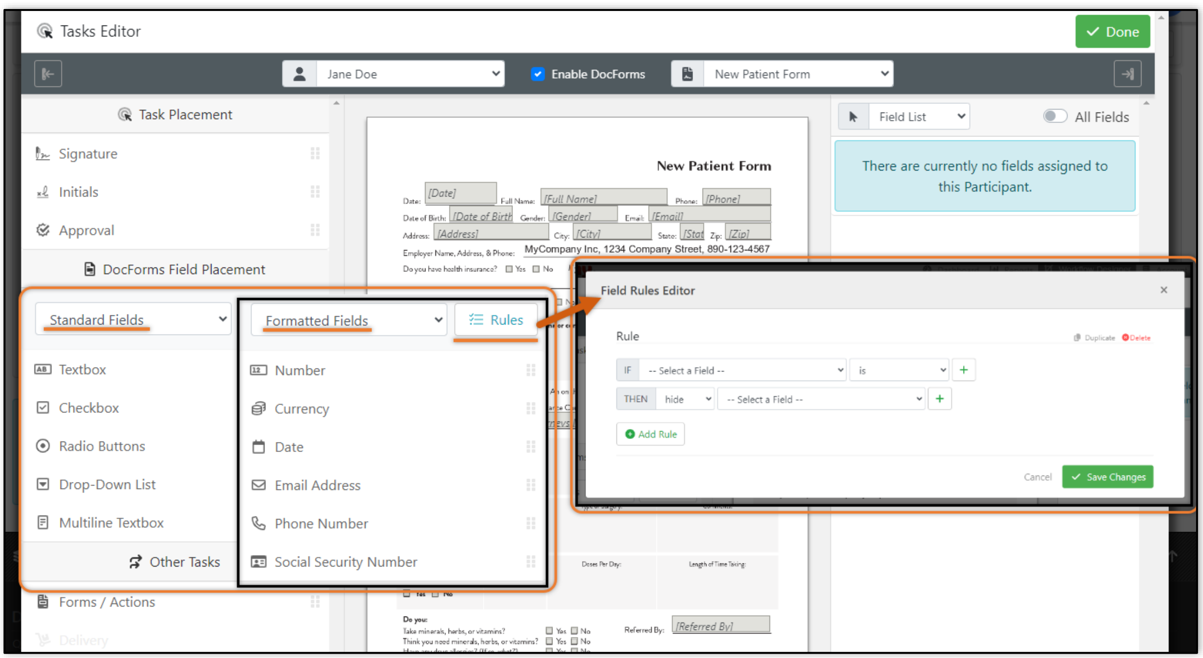
- **[PEP-6570]** ~ControlPanel ~Forms ~UI/UX

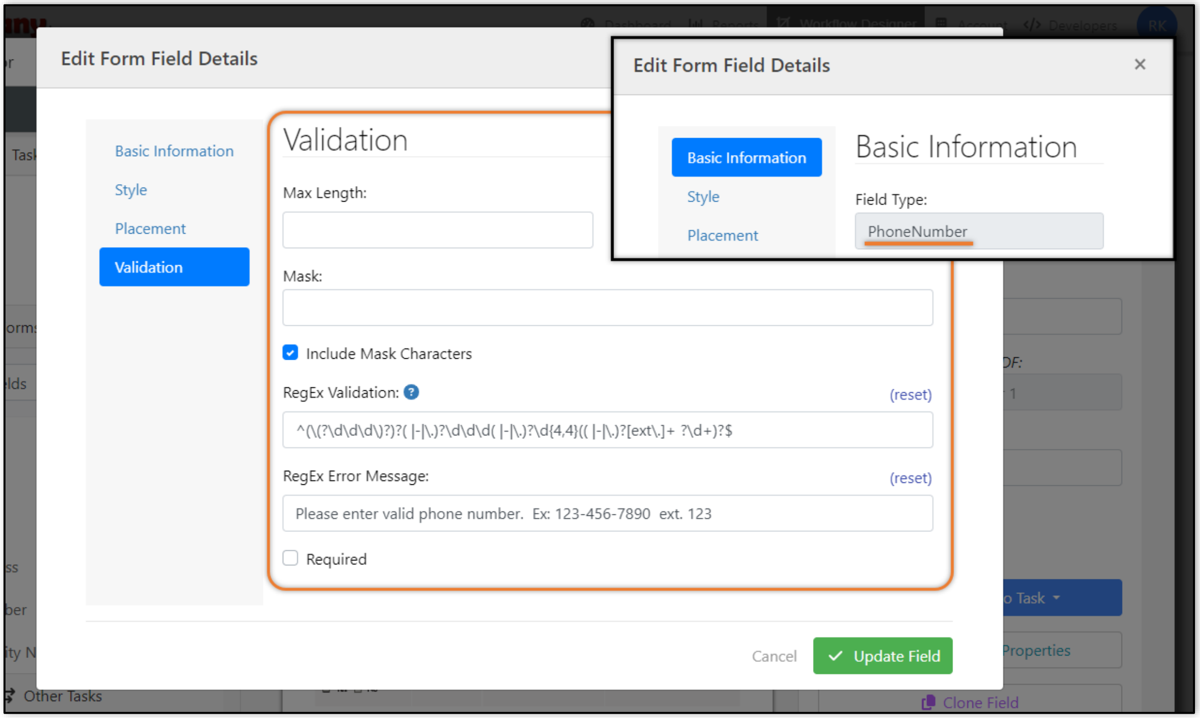
Added *Read-Only* field type to Web Forms. This field type cannot be edited by any participants in a transaction. Please see the image below for additional details.



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

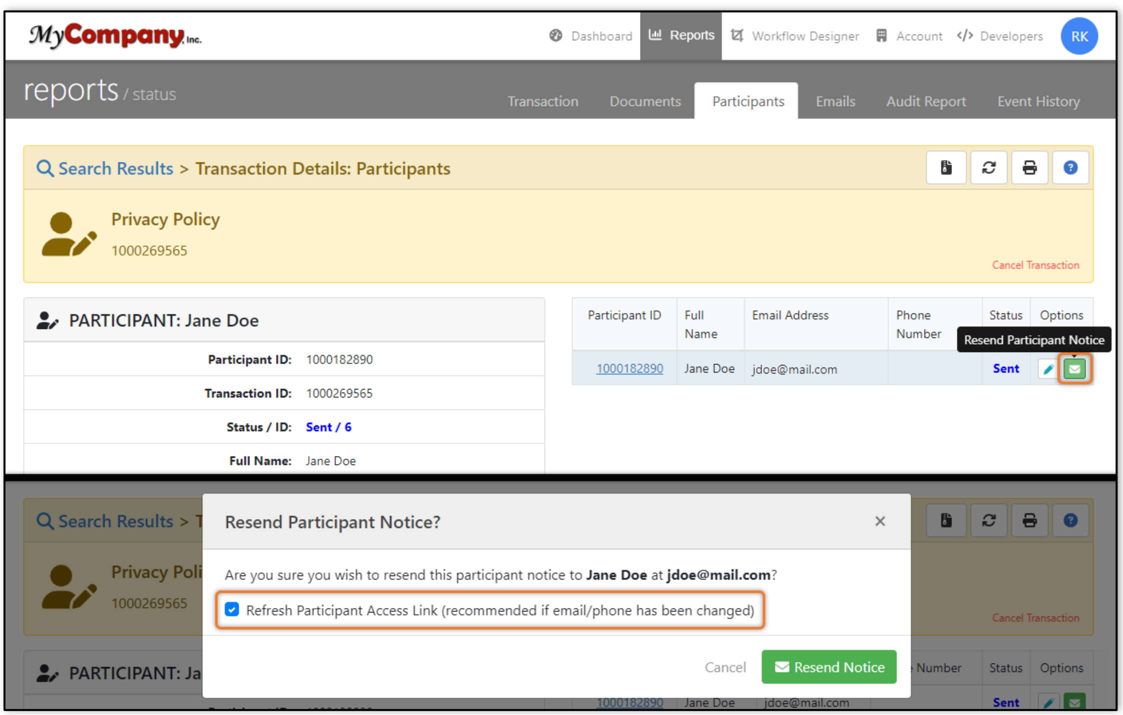
Added validation options into DocForms. This includes the following: added support for rules via API, the ability to insert specialized field types onto a DocForm, the ability to manage DocForm validation properties, increased validation rules when editing DocForm fields, and the ability to manage Rules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





- **[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.



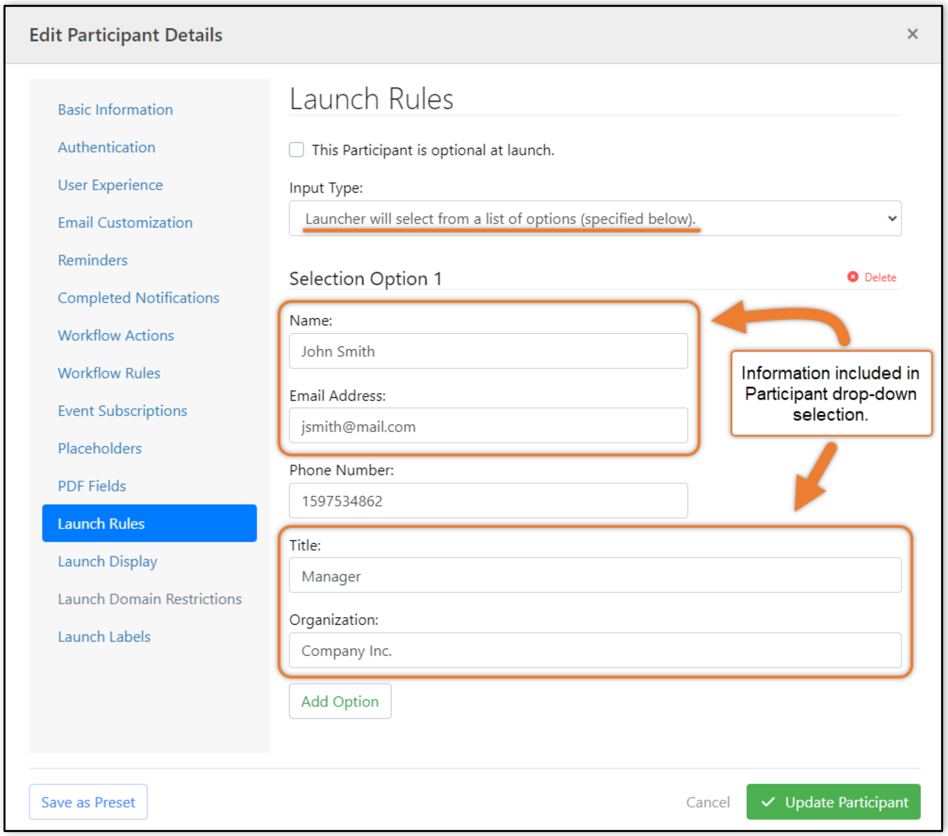
Improvements

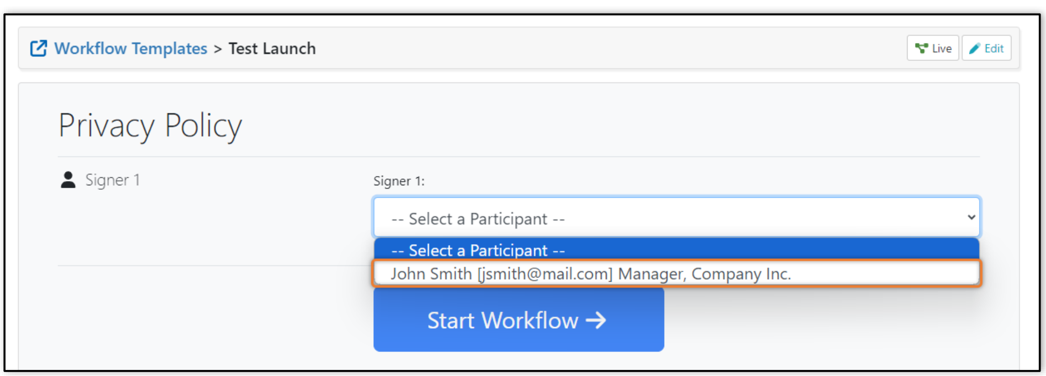
- **[PEP-7600]** ~Documents ~Emails ~Infrastructure ~Transactions

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

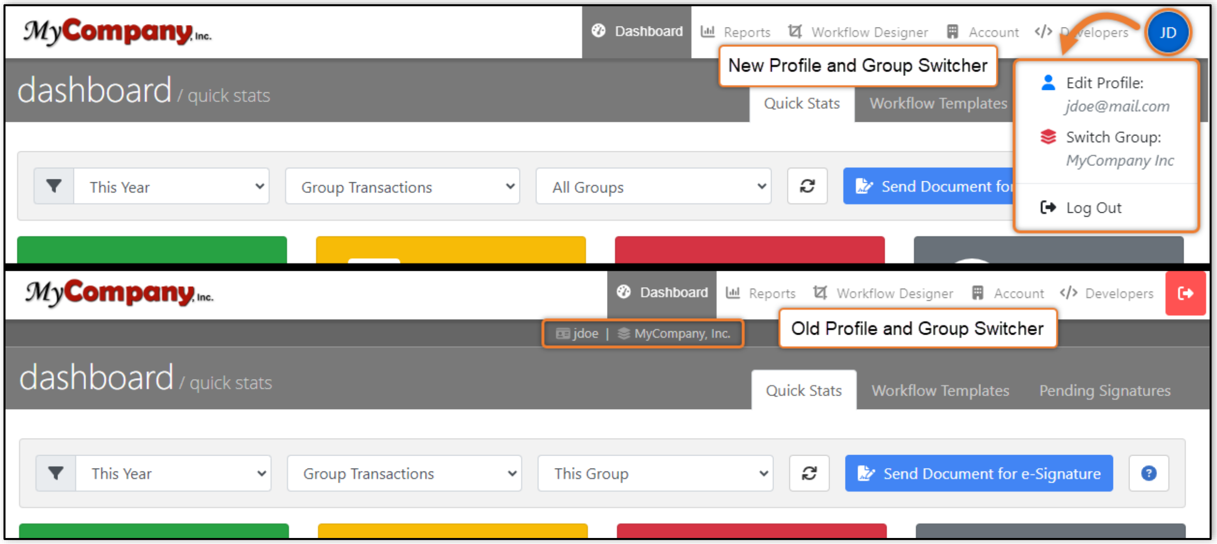
Improved the drop-down options for Participant selection. Added Email Address, Title, and Org to participant selection list on the launch page. Please see the images below for more information and an example.





- **[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.

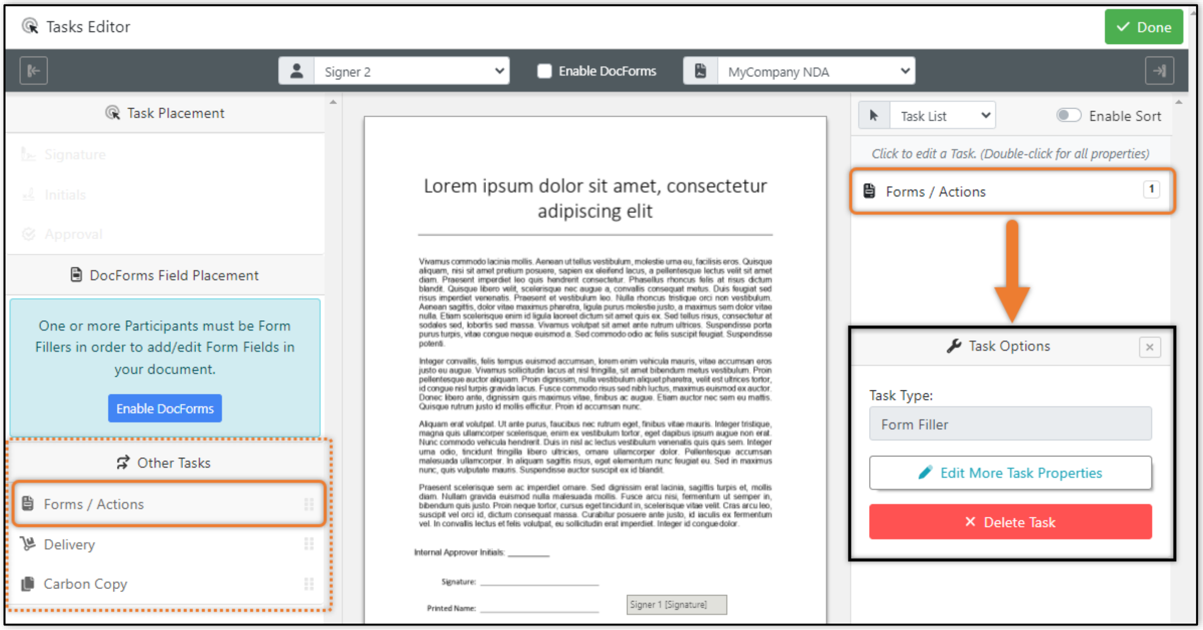
- **[PEP-7352]** ~API/WebServices ~EventSubscriptions

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.

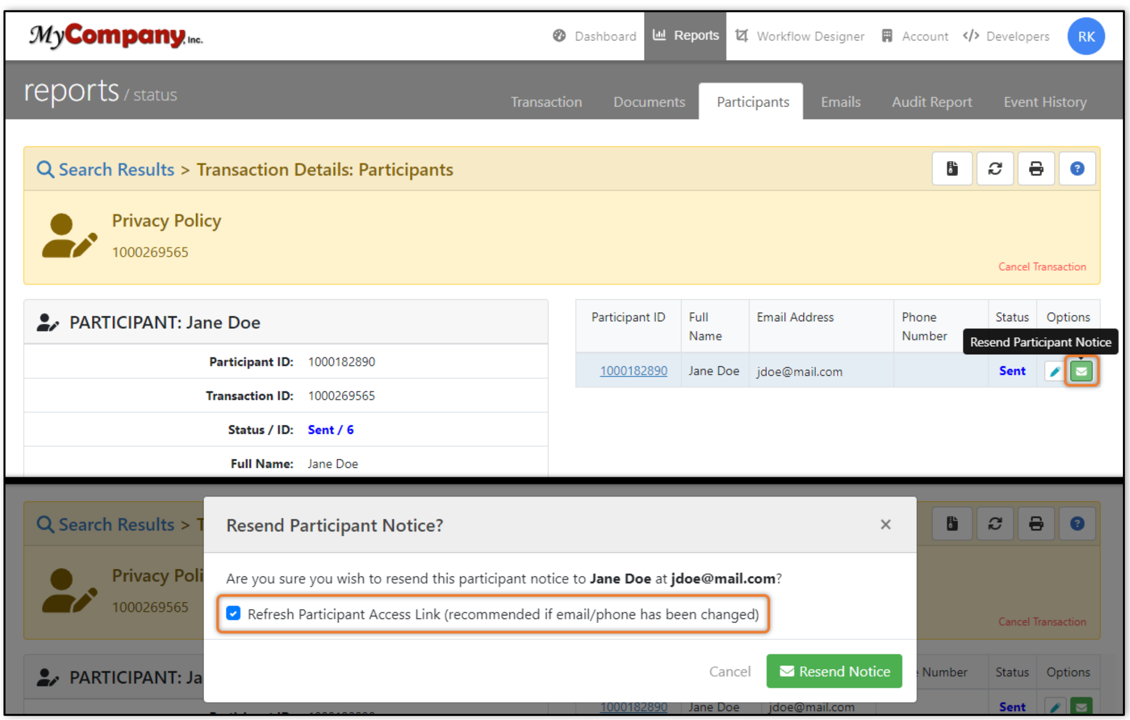


- **[PEP-7191]** ~Logging ~UI/UX

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.

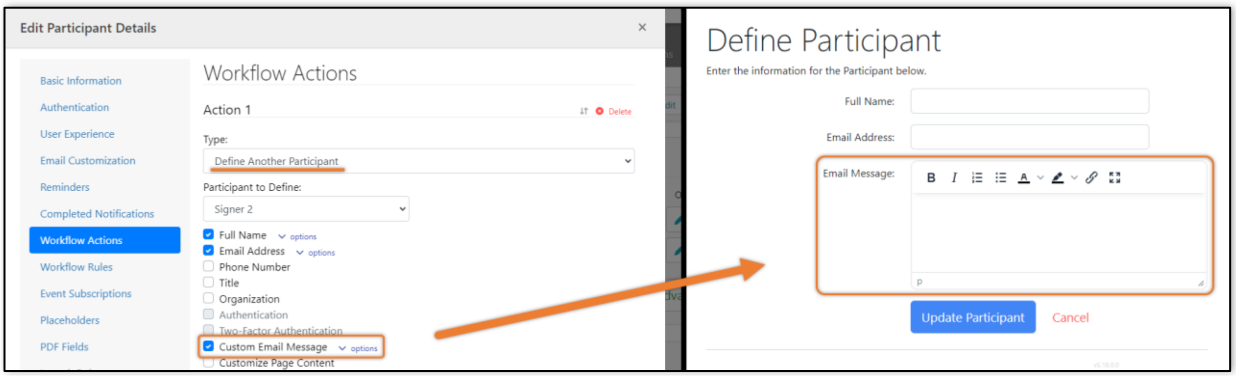
- **[PEP-6708]** ~Infrastructure ~Integrations

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
},
```

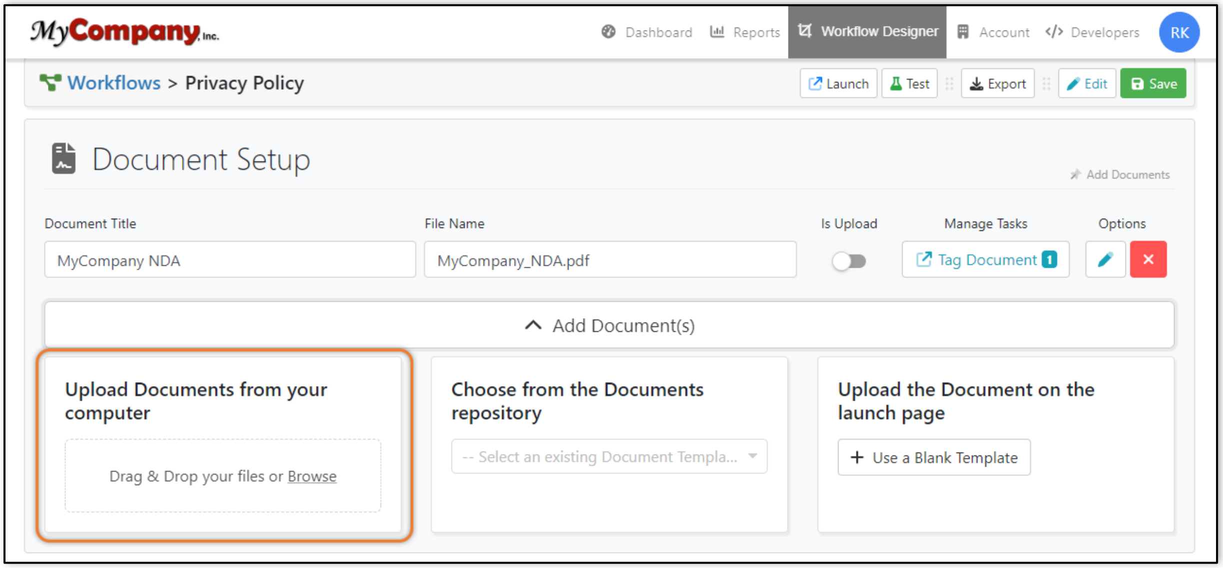
- **[PEP-6615]** ~ControlPanel ~Emails ~UI/UX ~WorkflowActions

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.



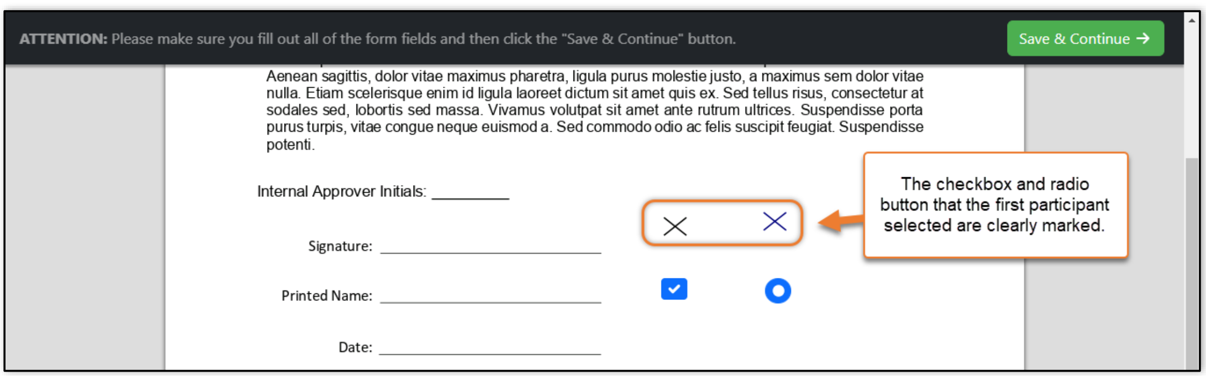
Bug Fixes

- **[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.

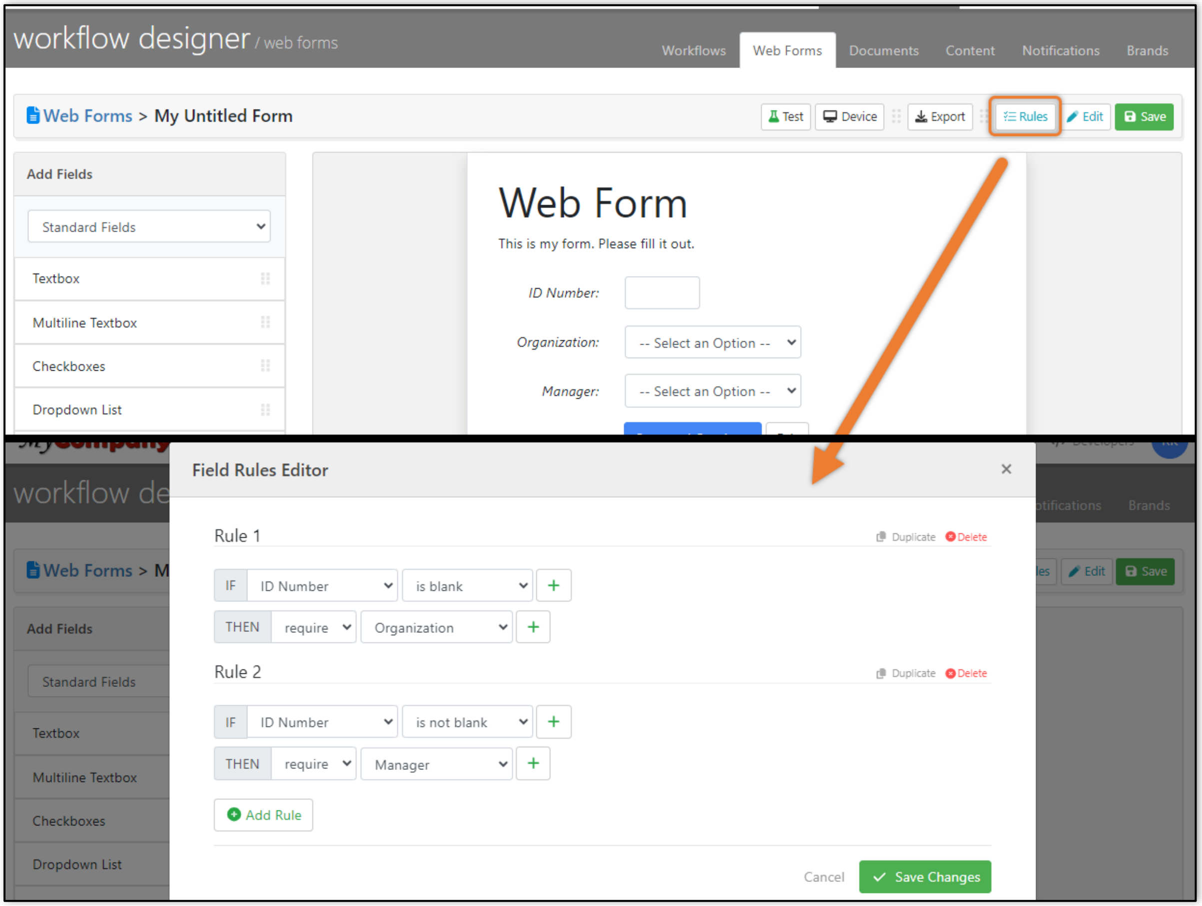


- **[PEP-7576]** ~Workflows

Fixed issue where HTML signings were not functional.

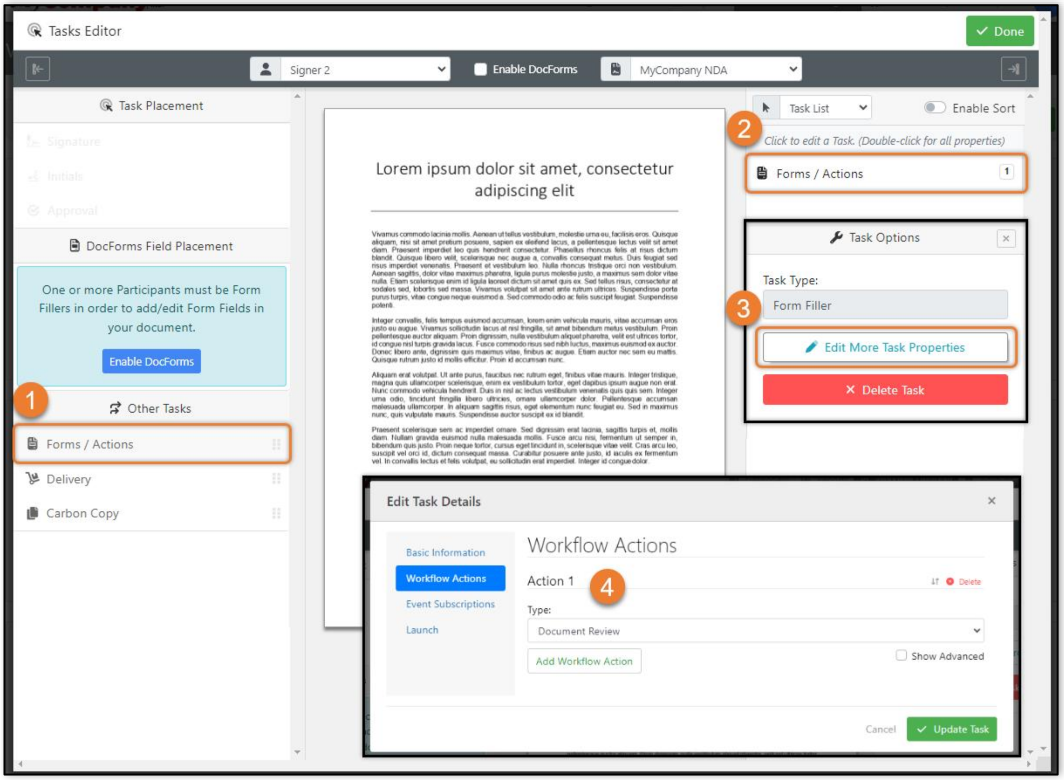
- **[PEP-7567]** ~Forms

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



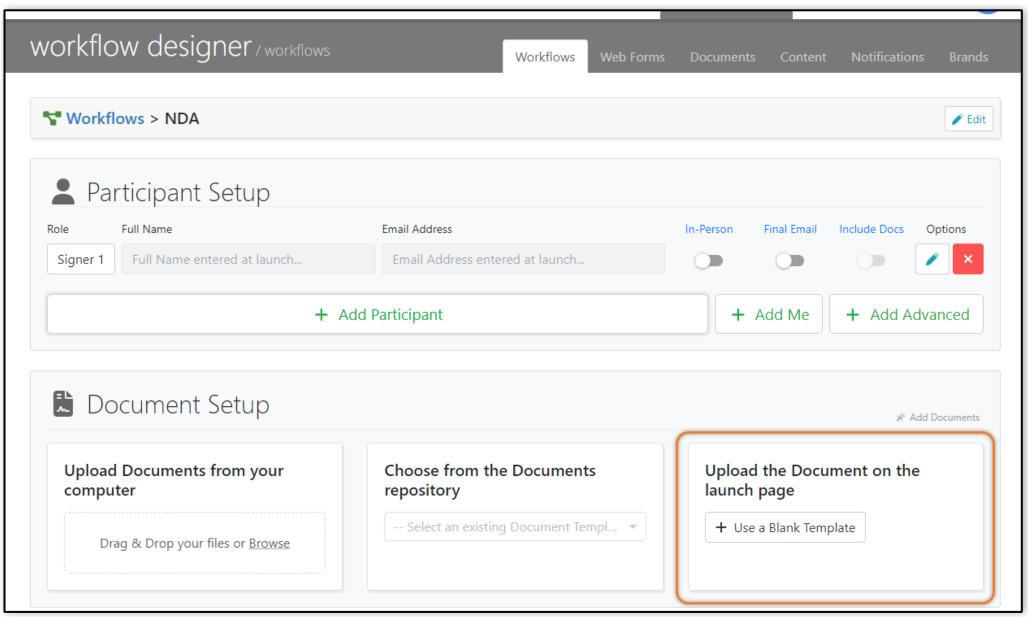
- **[PEP-7553]** ~Forms ~UI/UX ~WorkflowActions ~Workflows

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.

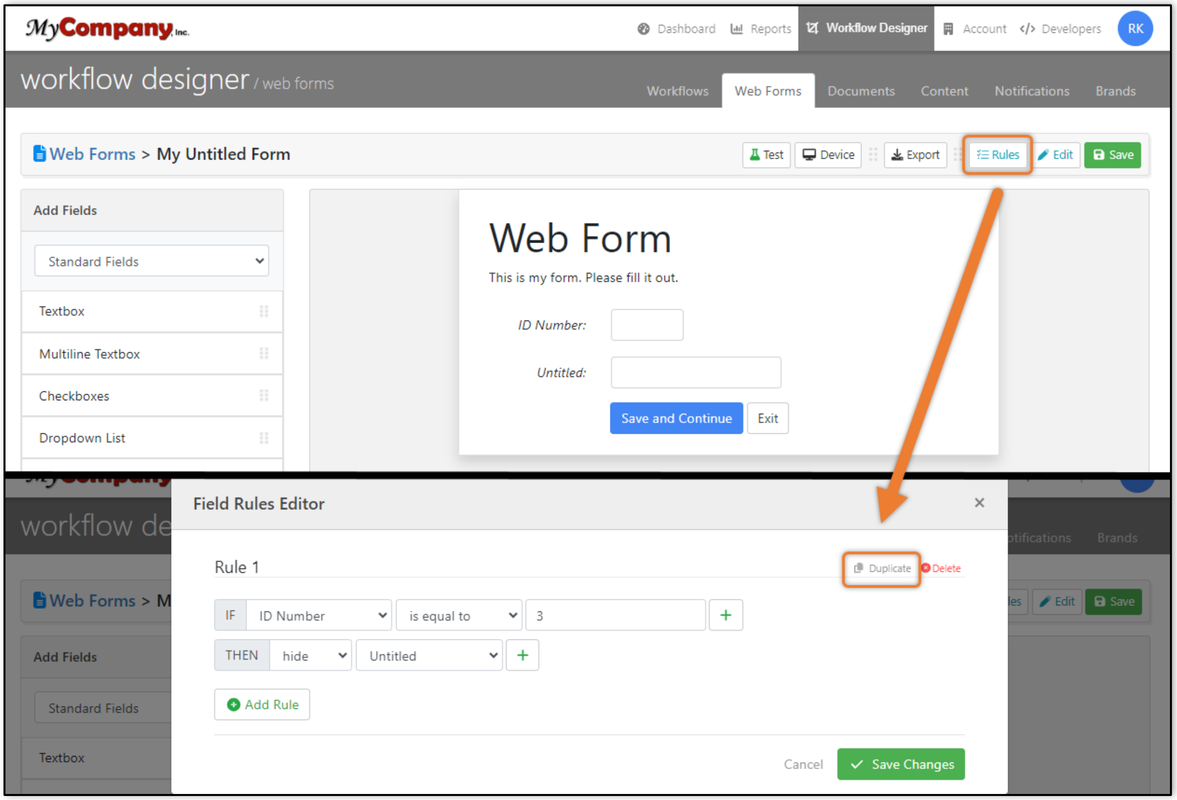


- **[PEP-7494]** ~ContentSets ~Workflows

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

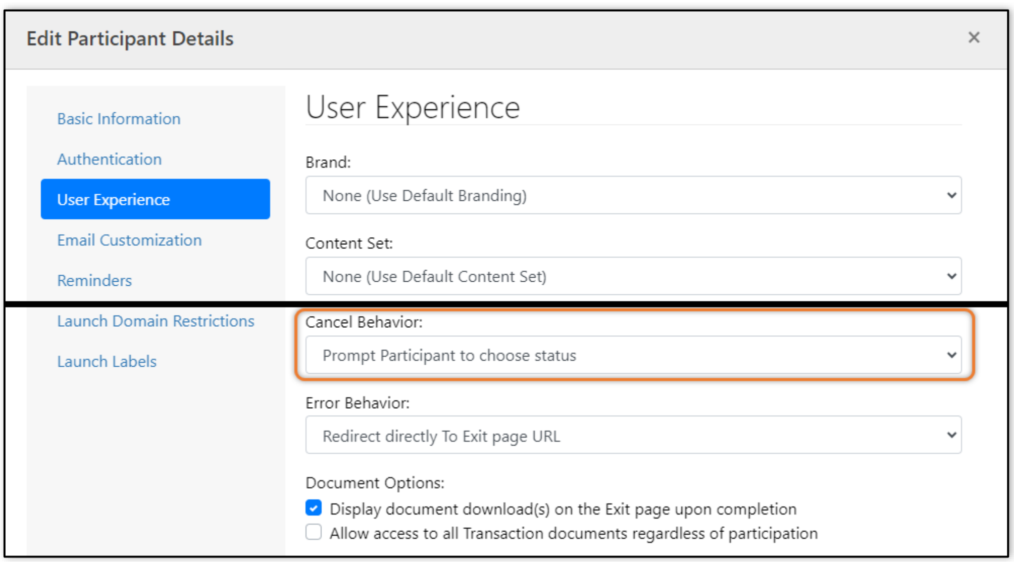
- **[PEP-7486]** ~Forms ~UI/UX

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



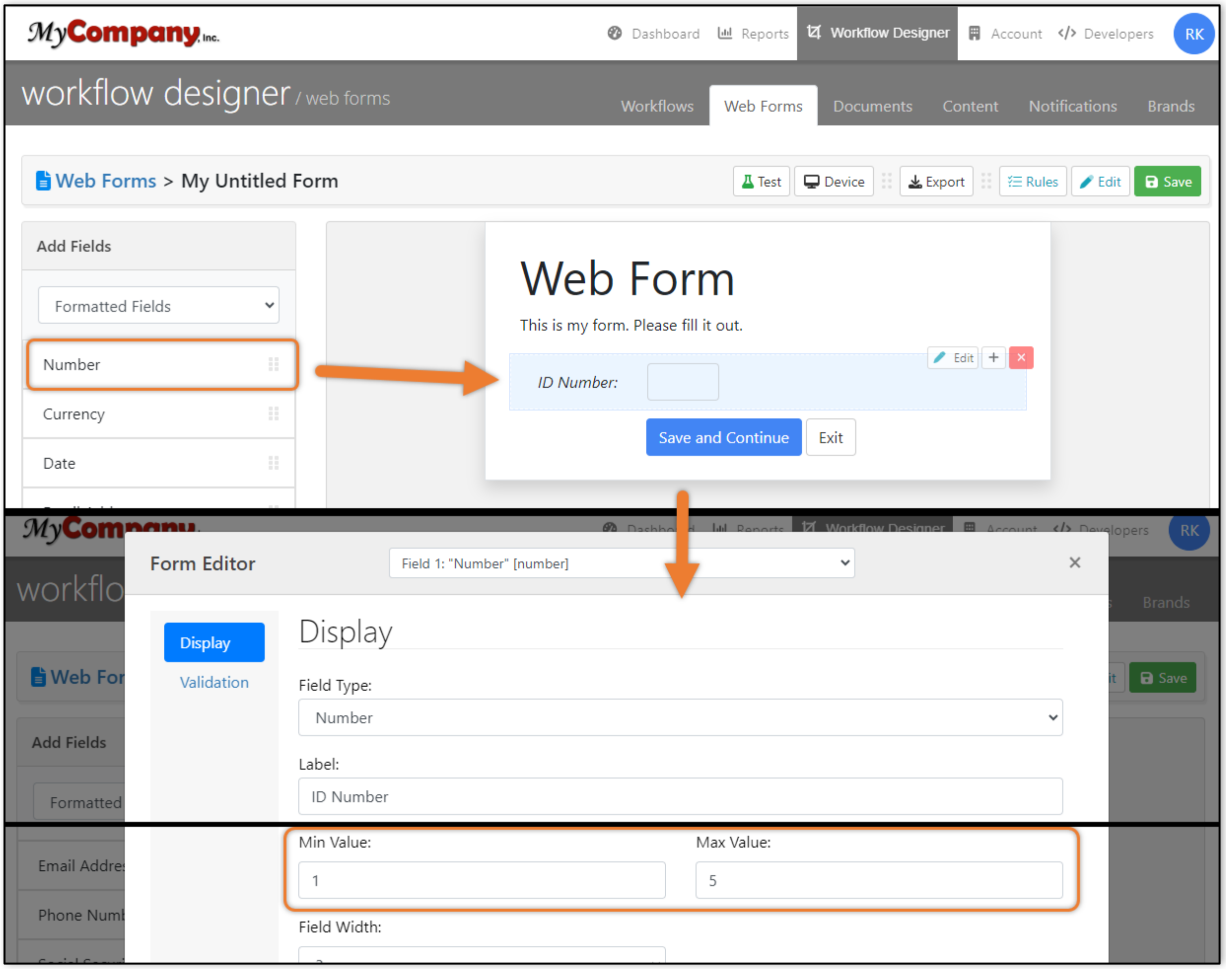
- **[PEP-7483]** ~Transactions ~UI/UX ~WorkflowActions ~Workflows

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.



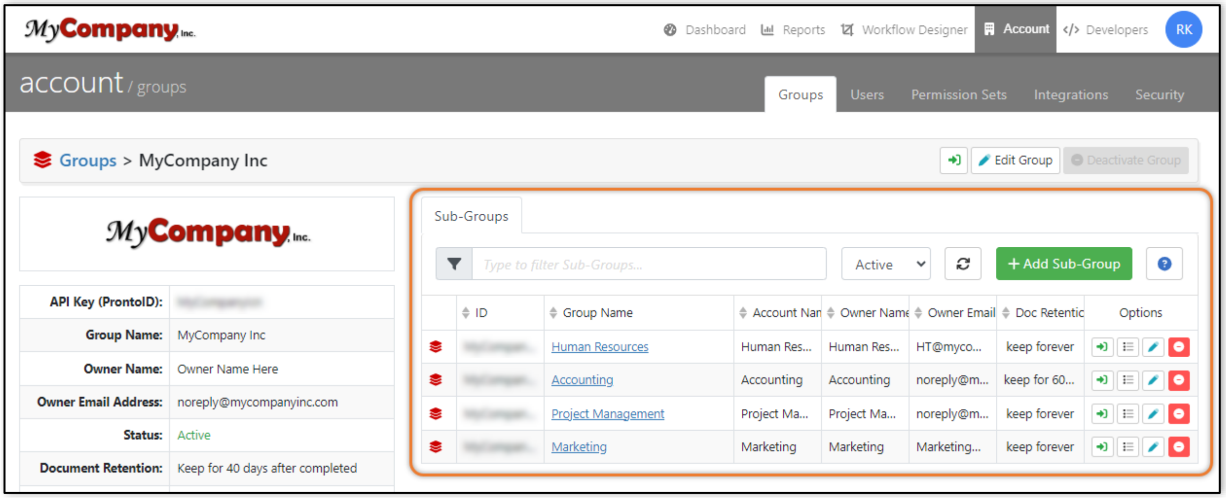
- **[PEP-7460]** ~Forms

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.



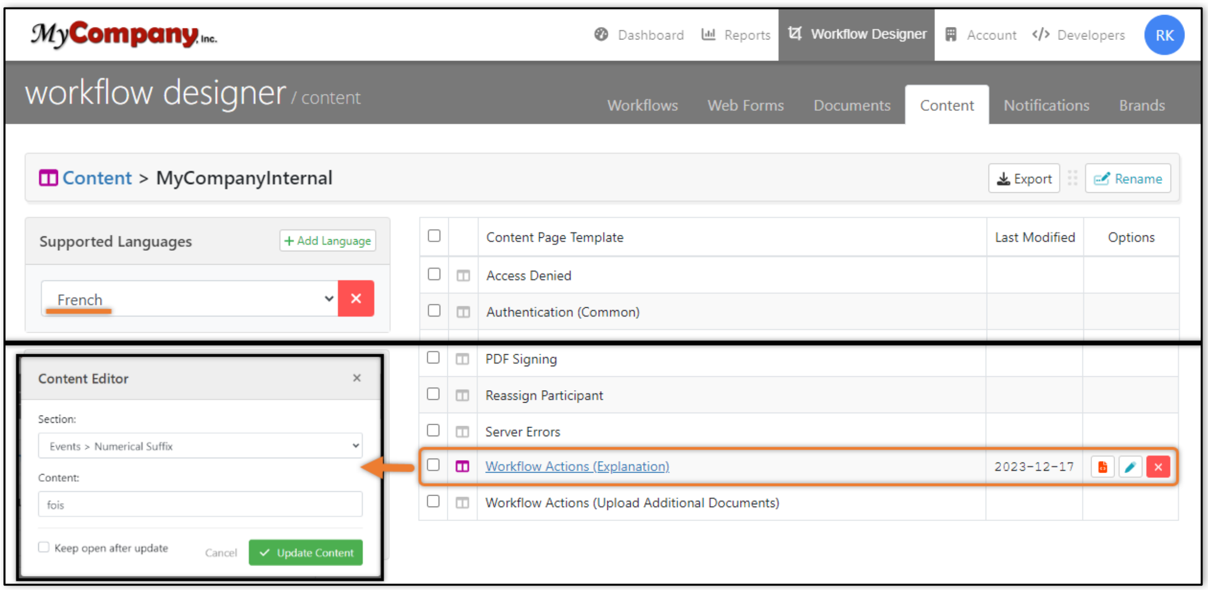
- **[PEP-7445]** ~Groups ~UI/UX

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

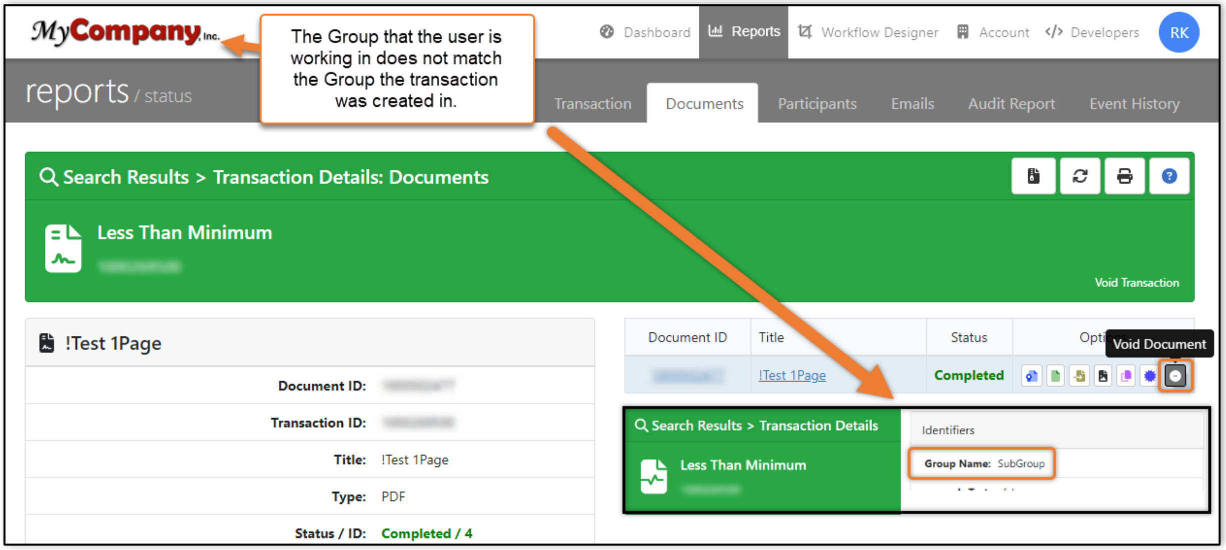
Fixed issue where expiration notices were not being sent for expired transactions.

- **[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.

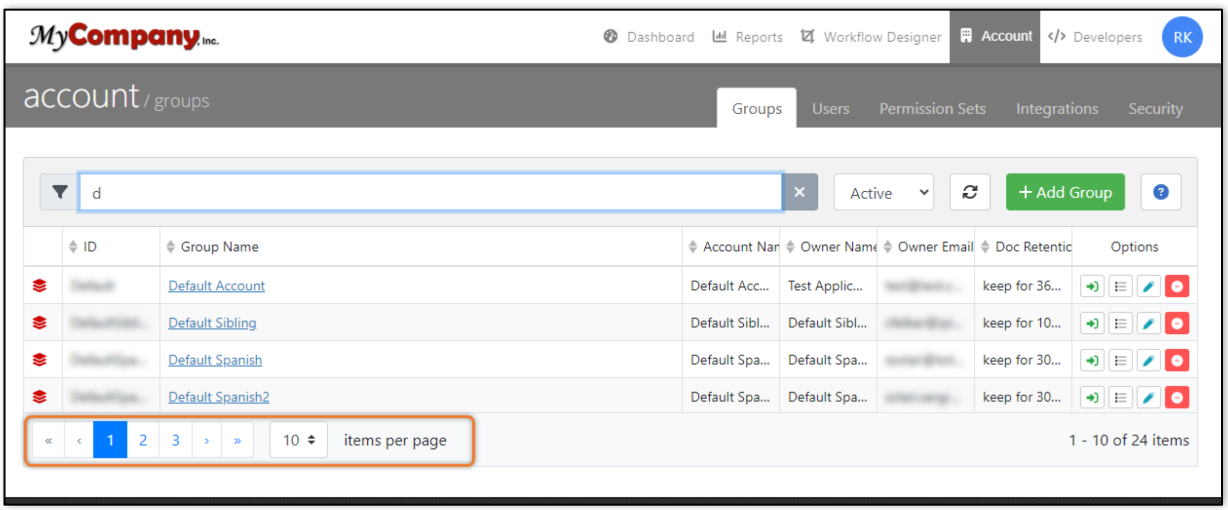
- **[PEP-7266]** ~Documents ~Reports ~Transactions

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.

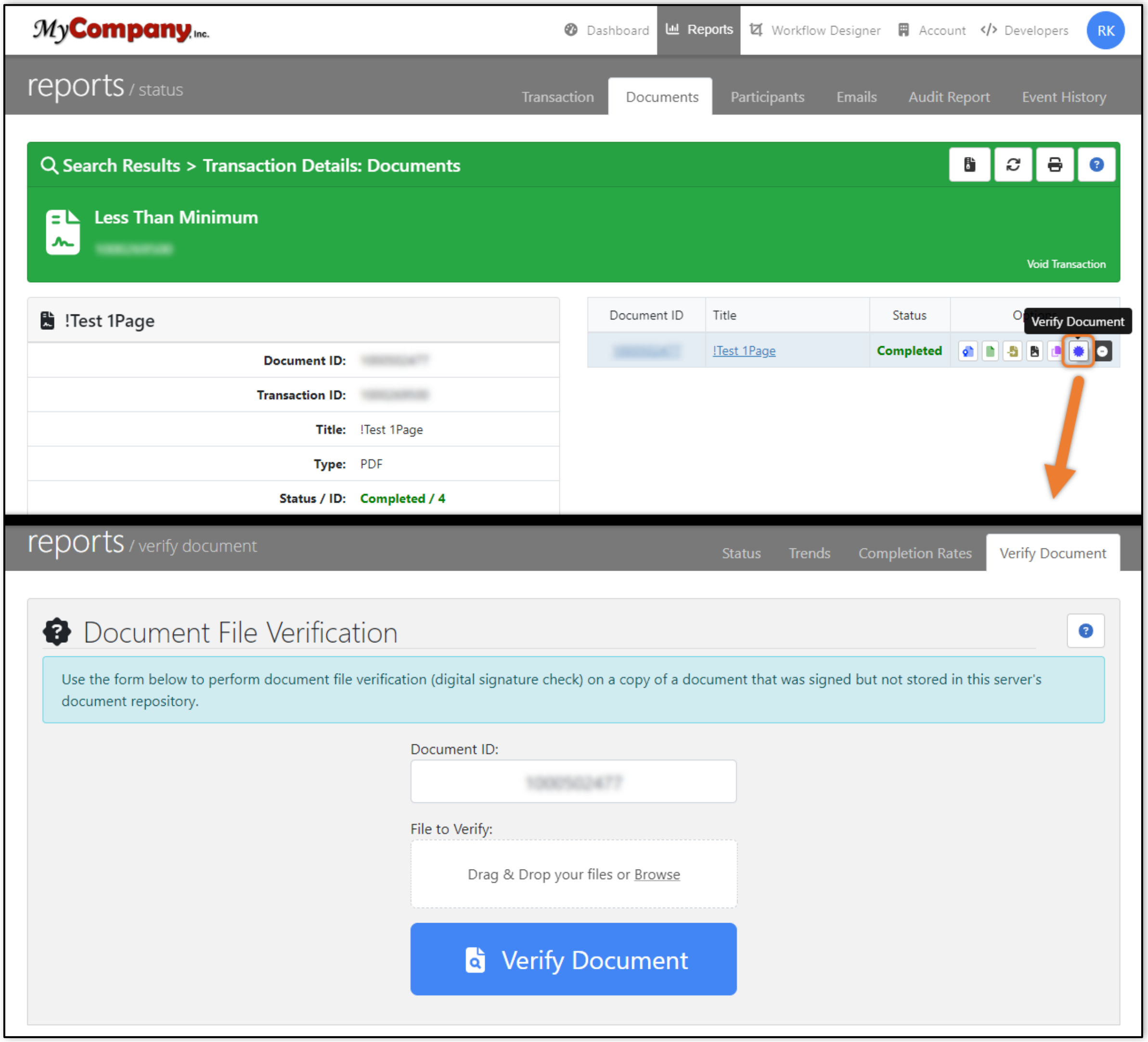


- **[PEP-7206]** ~Installer
Fixed issue where the AlphaTrust installer incorrectly configured the Startup Type for specific AlphaTrust services as 'Automatic' rather than the intended 'Automatic (Delayed Start)'.

- **[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.

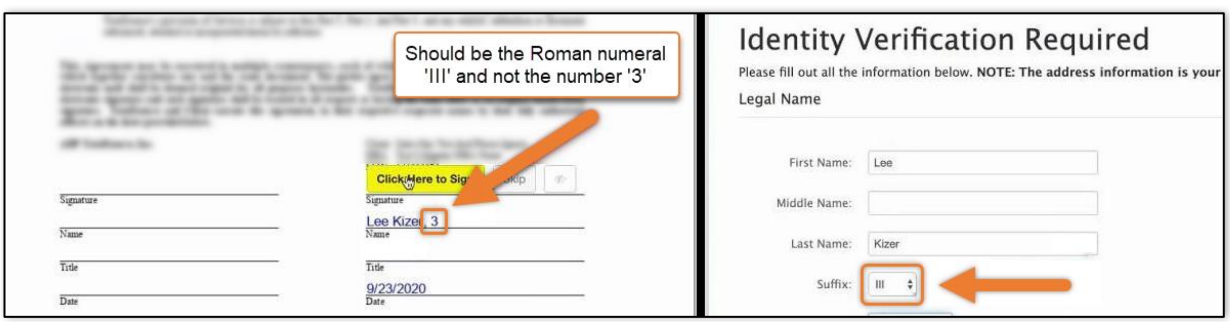


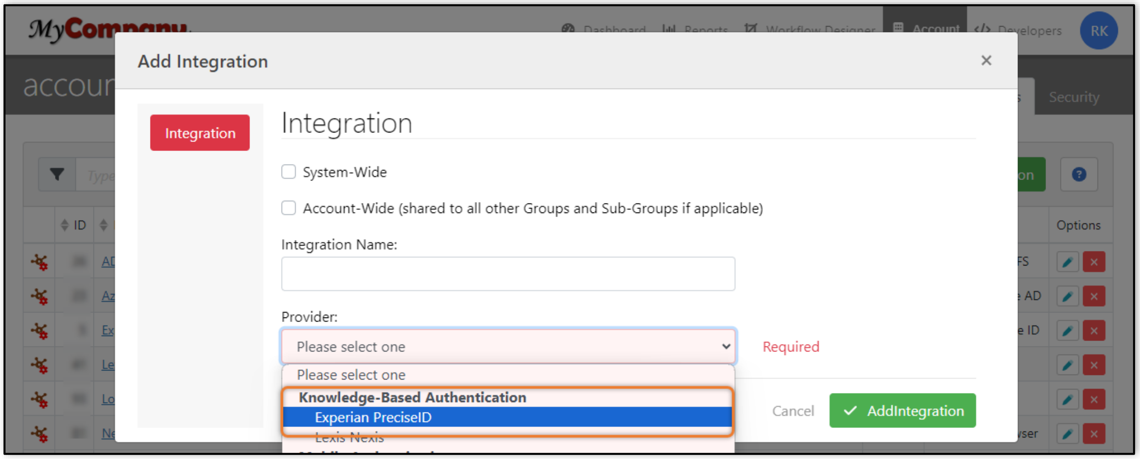
- **[PEP-6927]** ~Documents ~Reports ~Transactions
Fixed issue where HTML documents could not be verified in the control panel. Please see the image below for the referenced setting.



- **[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.





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.

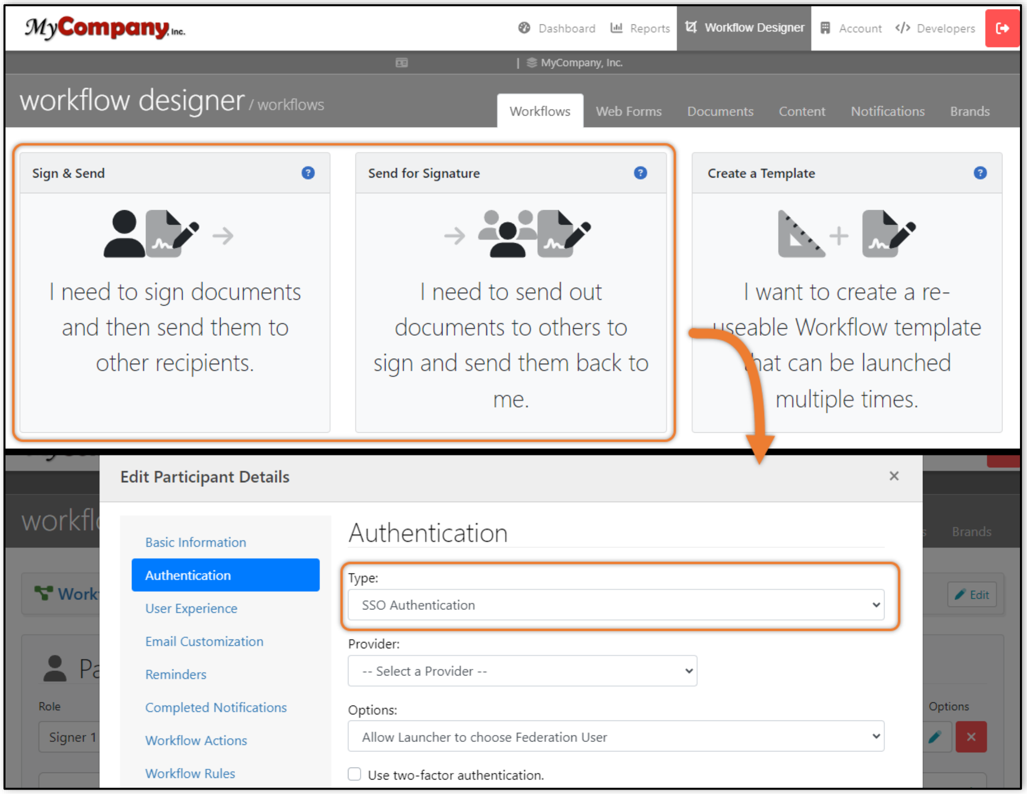
v5.17.13.1 Release *Release Date: 2/26/2024*

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.

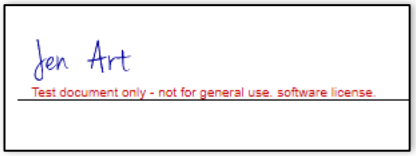


v5.17.13 Release *Release Date: 2/15/2024*

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.

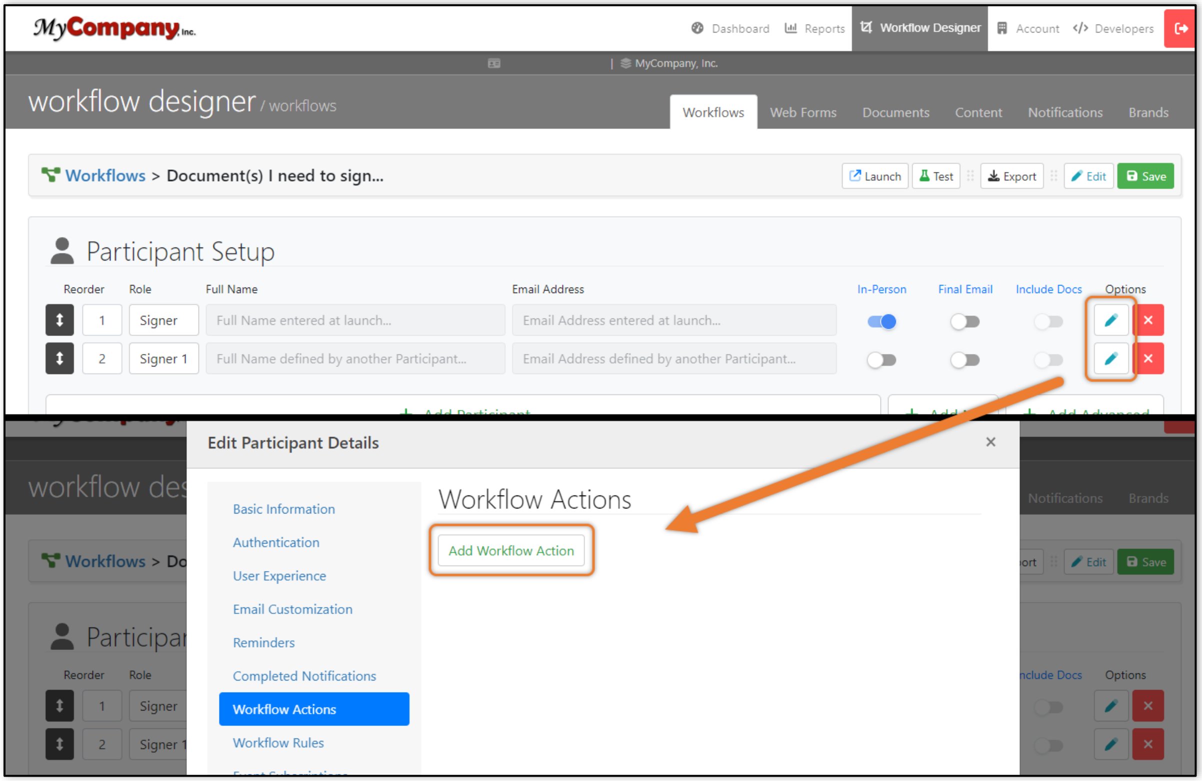


v5.17.12 Release *Release Date: 12/14/2023*

Bug Fixes

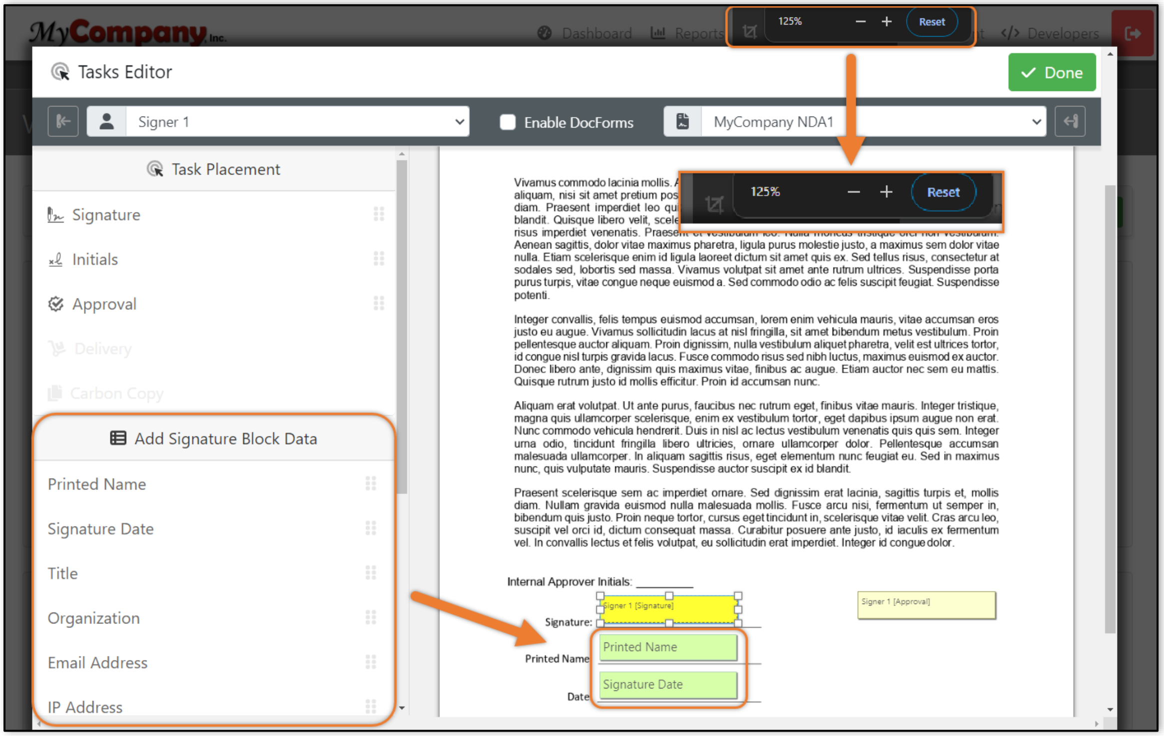
- **[PEP-7482]** ~ControlPanel ~UI/UX ~Workflows ~WorkflowActions

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.



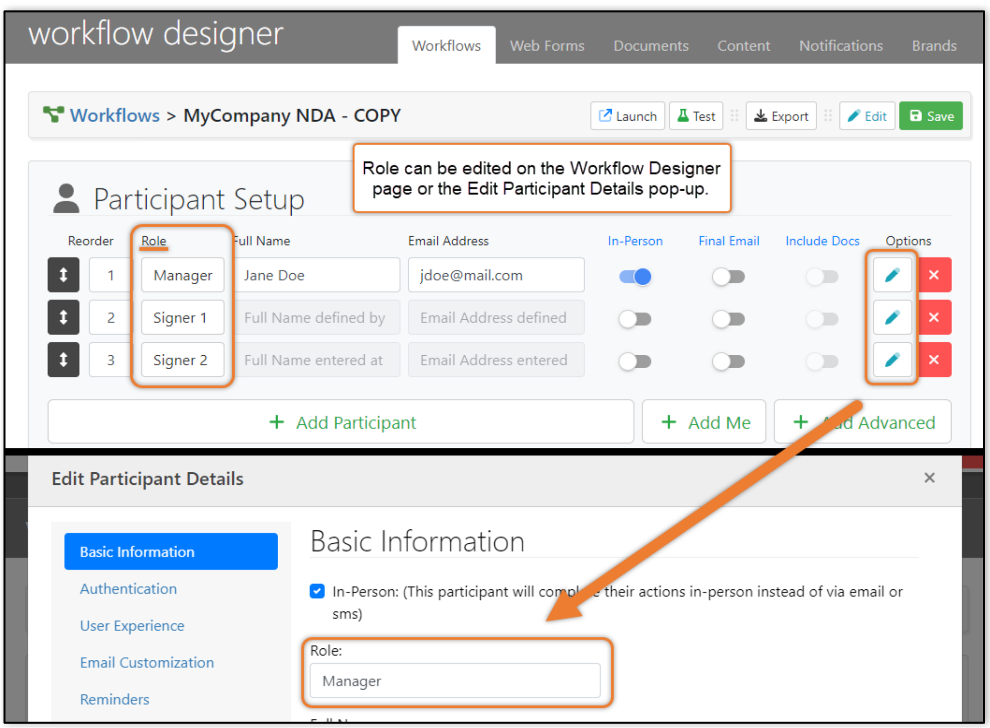
- **[PEP-7343]** ~Signatures ~Signing

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.

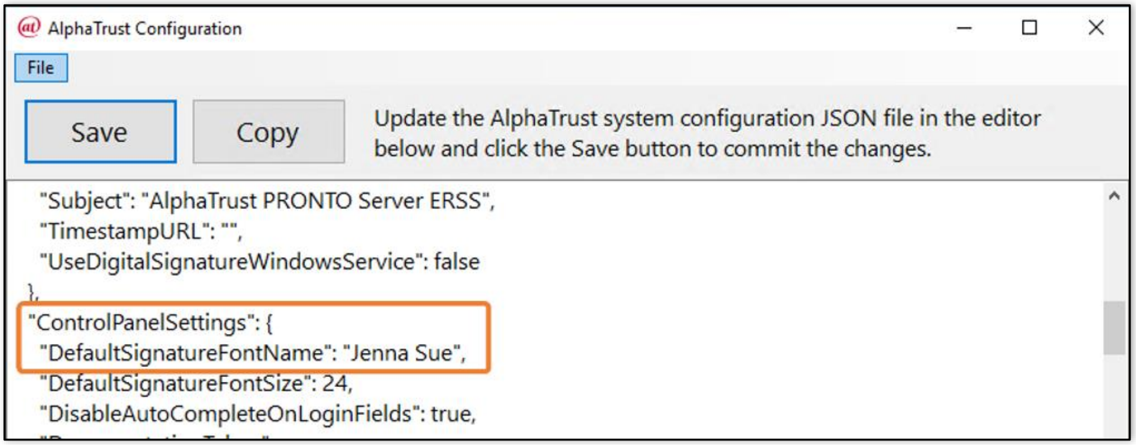


v5.17.11 Release *Release Date: 11/20/2023*

Bug Fixes

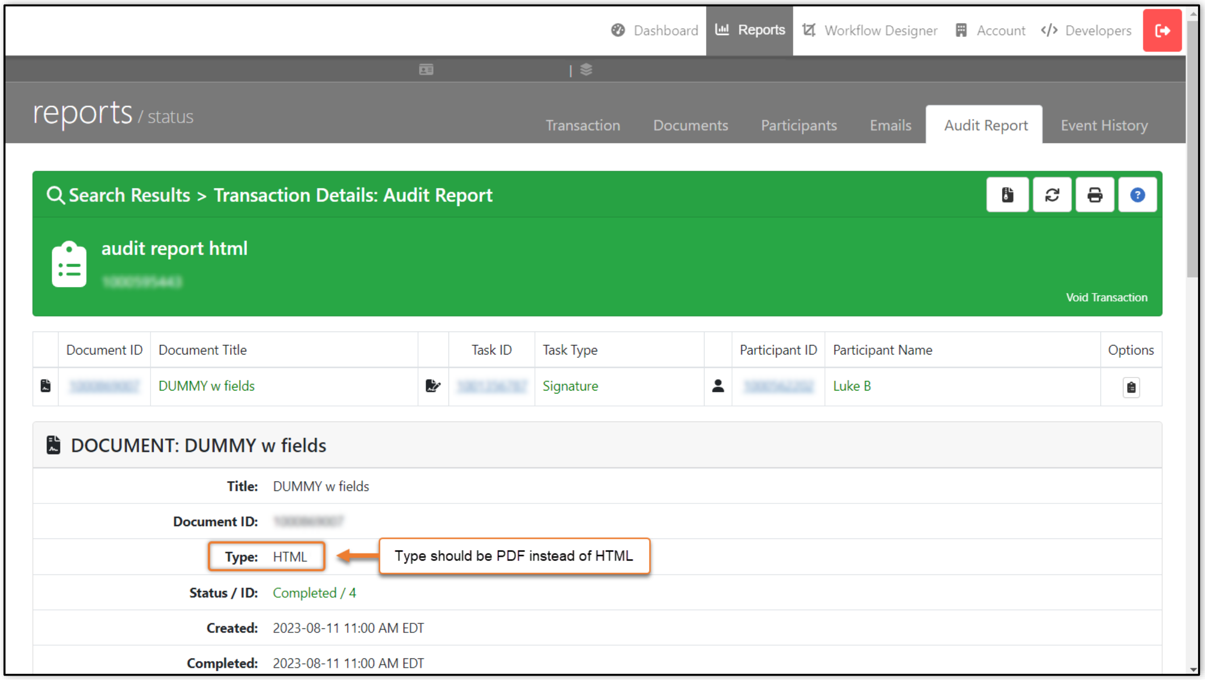
- **[PEP-7449]** ~Signing ~UI/UX

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*

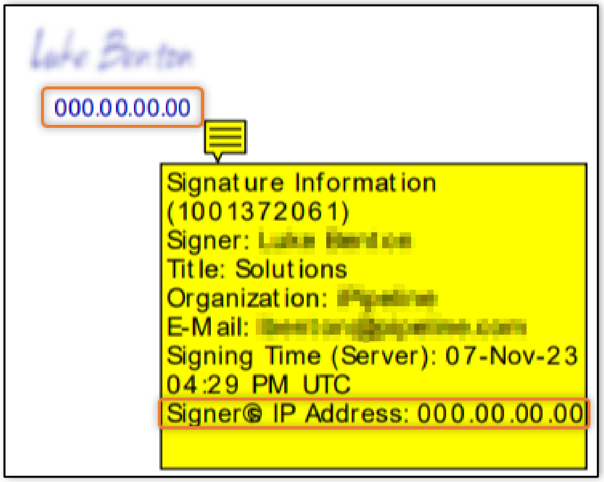
Bug Fixes

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

Fixed issue where closing transactions could cause 502 Gateway Errors.

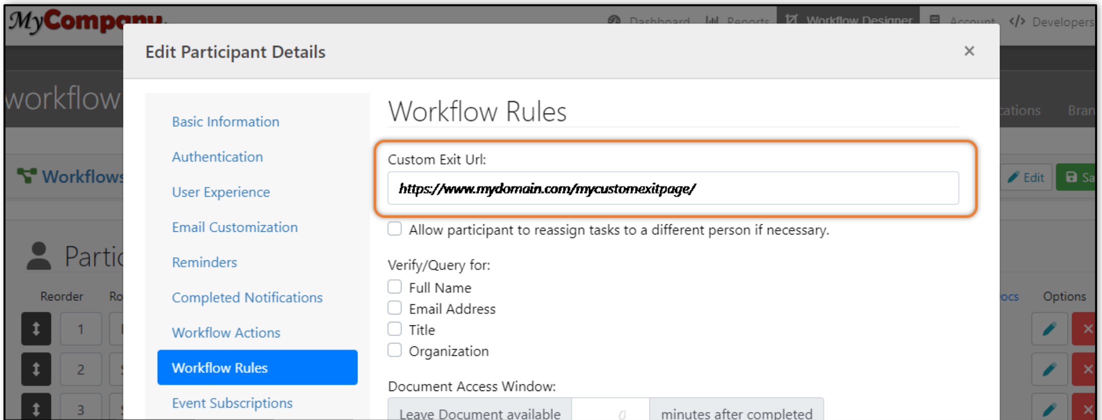
- **[PEP-7401]** ~API/WebServices ~Signing

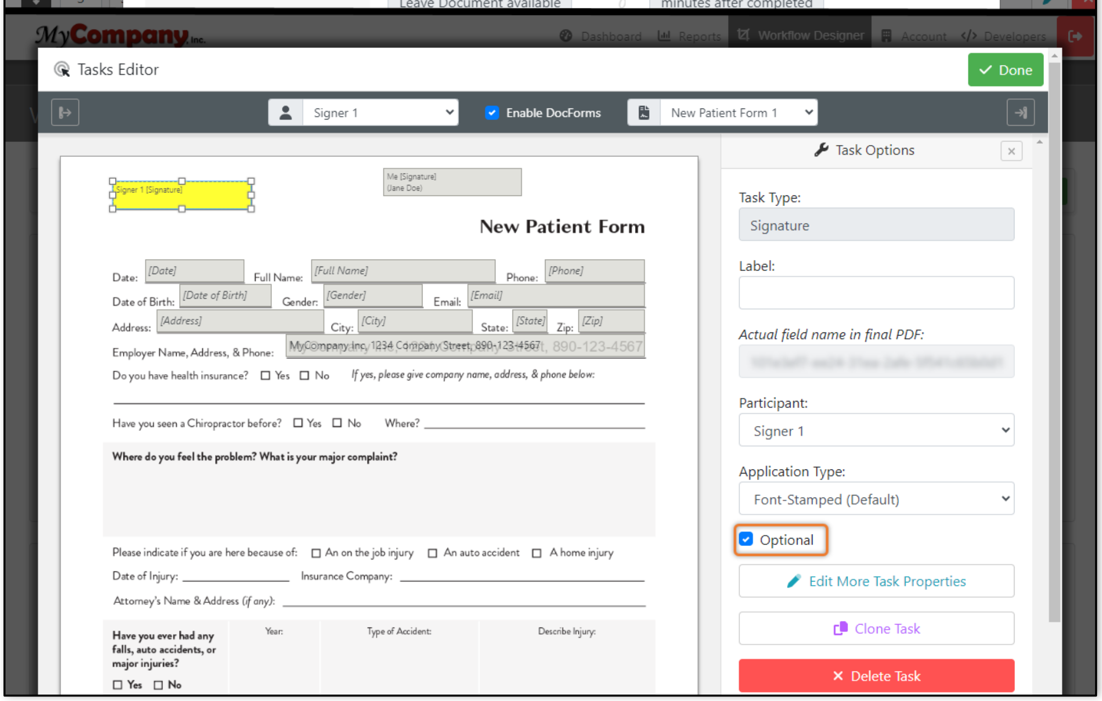
Fixed issue where a signers IP address would not be displayed in the signature annotation and signature block data when it should have been included. Please see the image below for an example of the correct signature block and annotation containing a signers IP address.



- **[PEP-7396]** ~Workflows

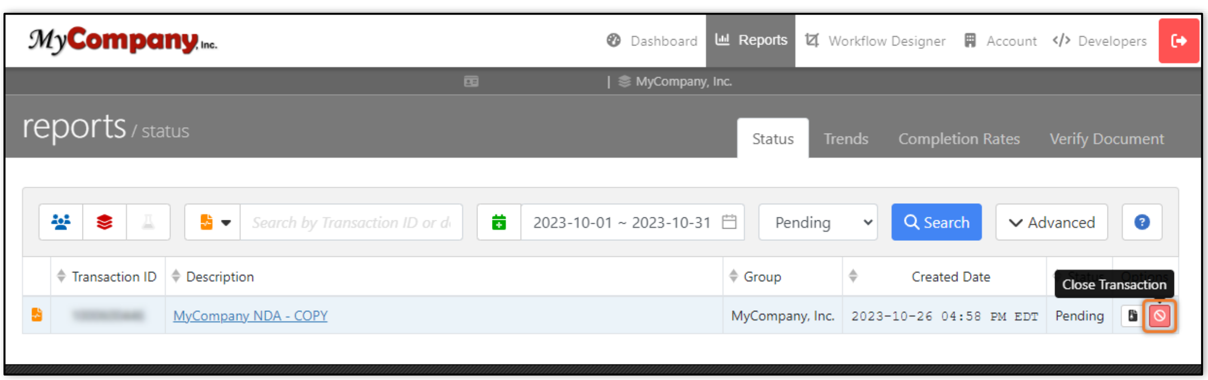
Fixed issue where if a participant declined to complete an optional signing task, the system would incorrectly navigate the participant to the participant's custom exit URL if it was set. Please see the image below for an example and the settings referenced.





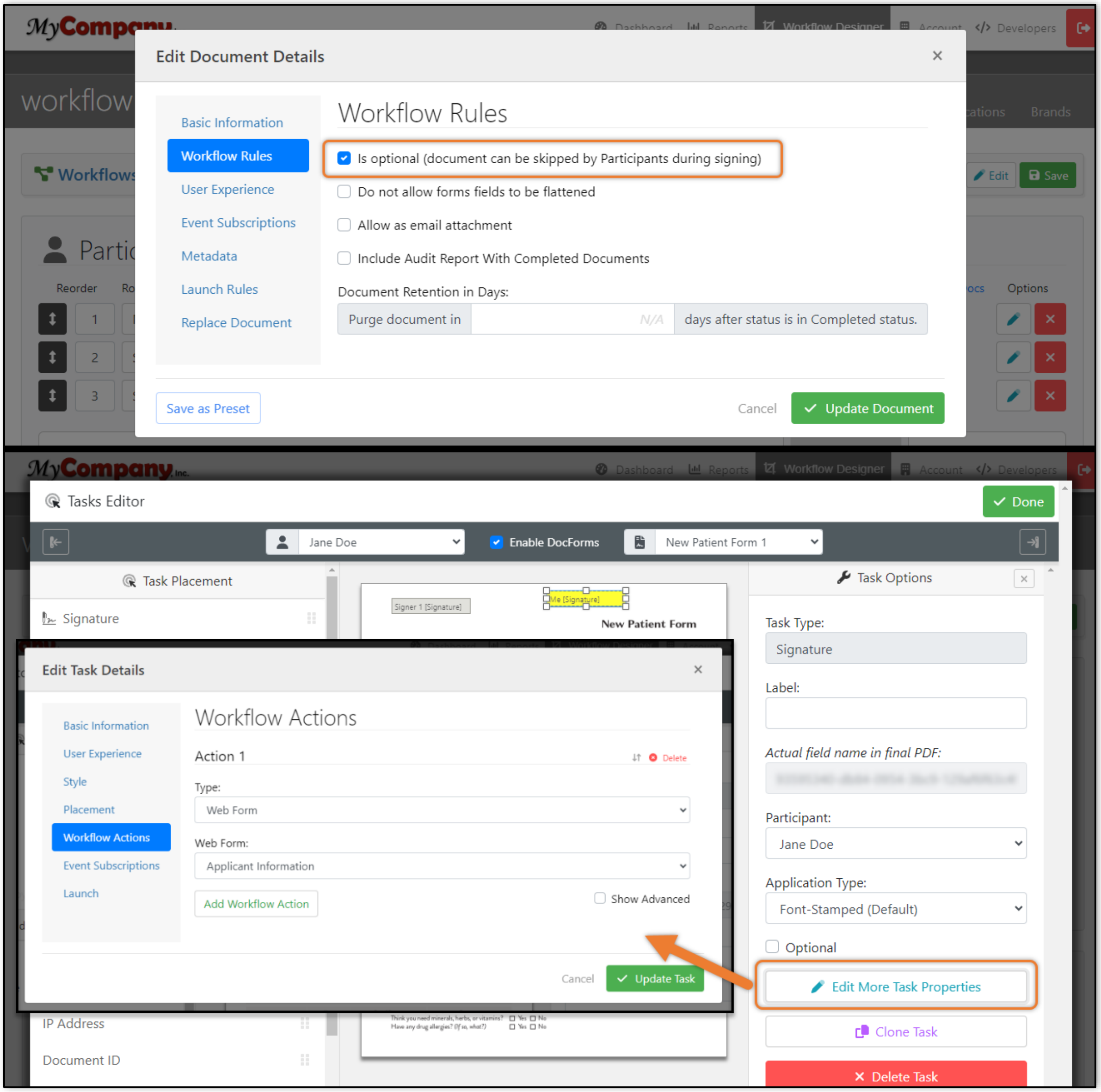
- **[PEP-7376]** ~Notifications ~Transactions

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.



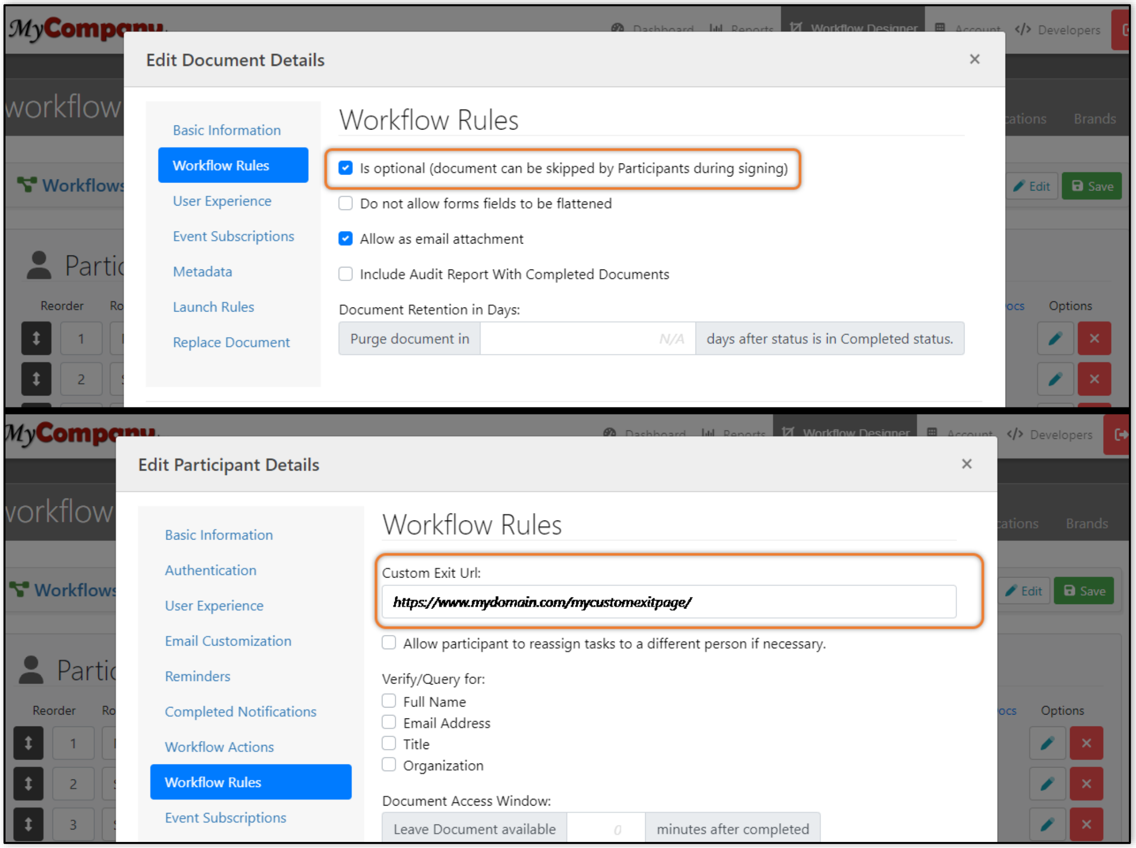
- **[PEP-7331]** ~Documents ~Signing ~UI/UX ~WorkflowActions

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.



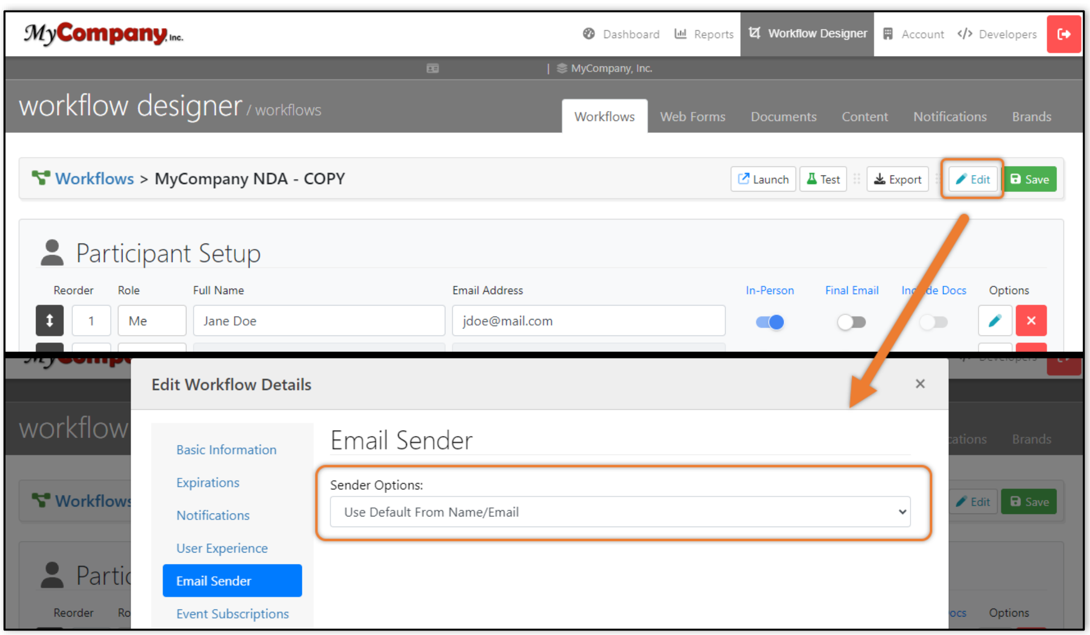
- **[PEP-7330]** ~Documents ~Signing ~UI/UX

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.



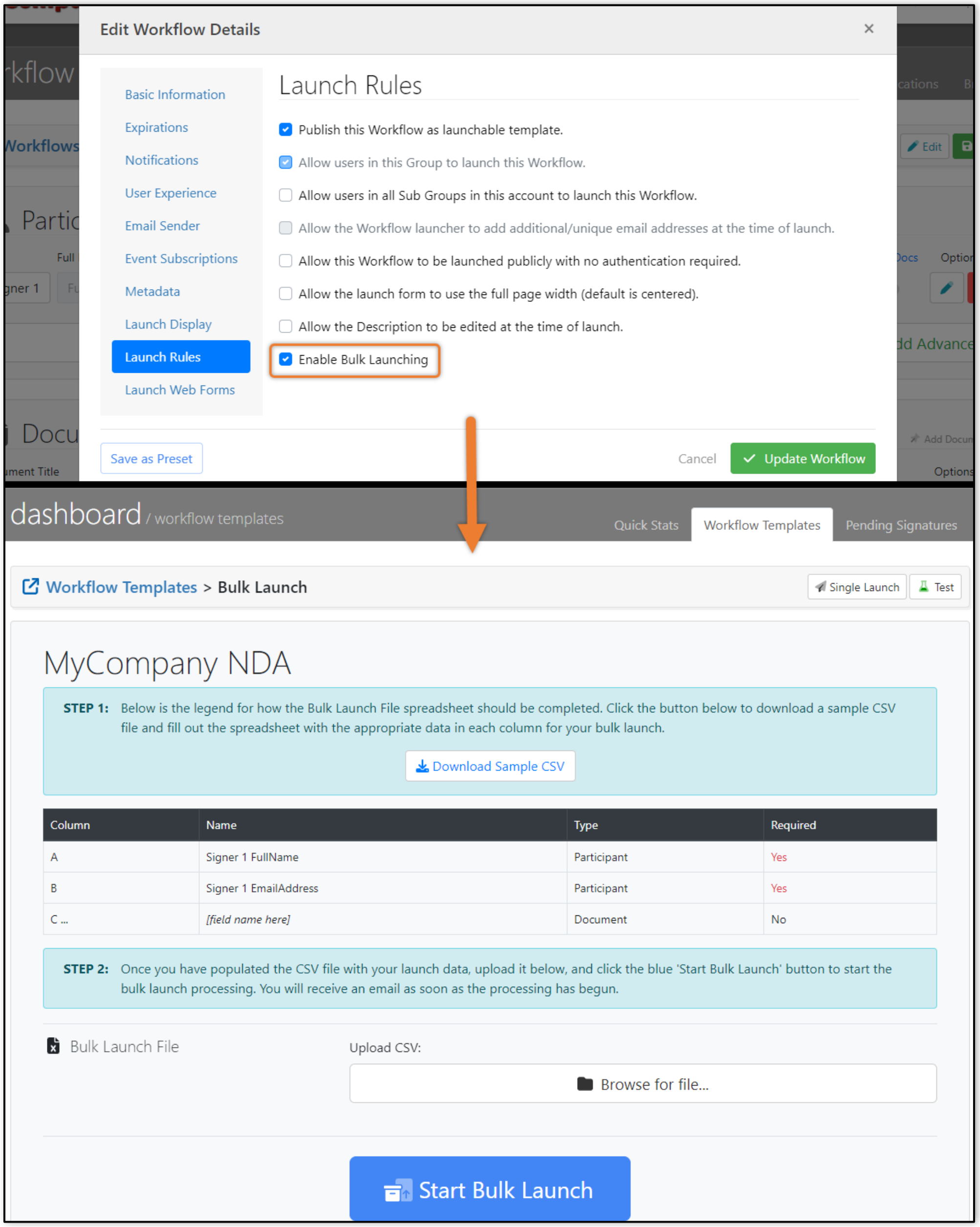
- **[PEP-7309]** ~UI/UX ~Workflows

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.

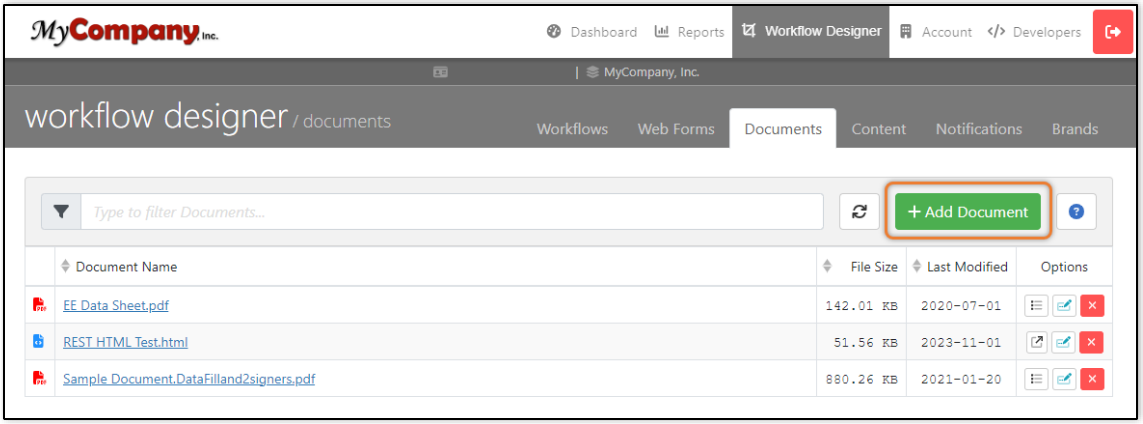


- **[PEP-6603]** ~Installer

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.

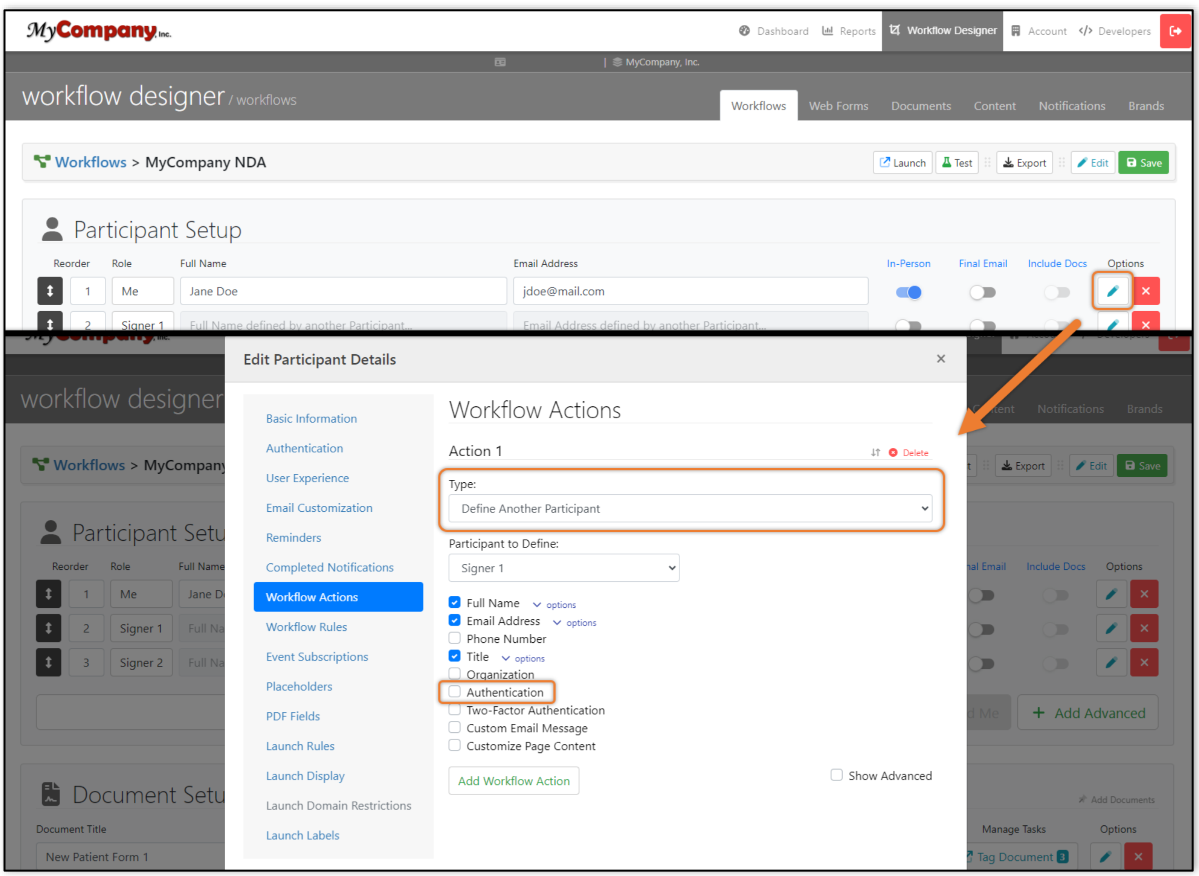


v5.17.9.1 Release *Release Date: 11/20/2023*

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.

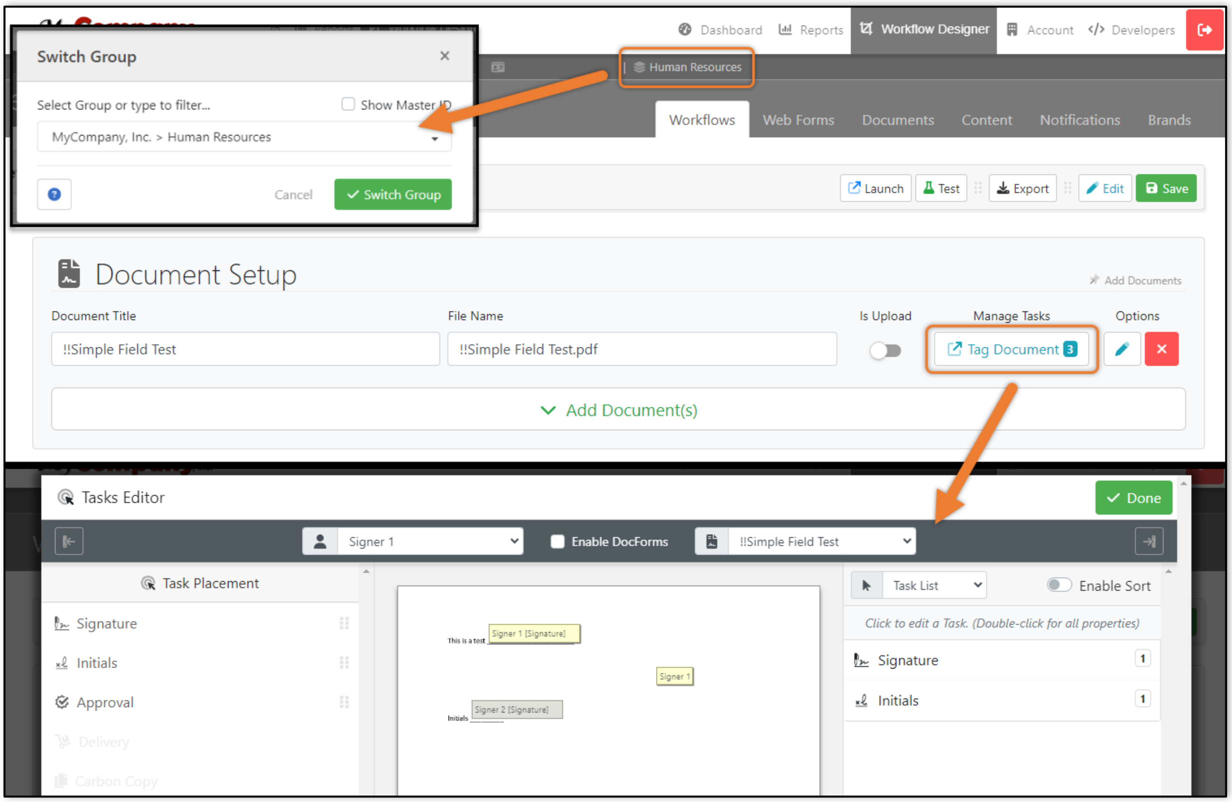


v5.17.9 Release *Release Date: 11/3/2023*

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

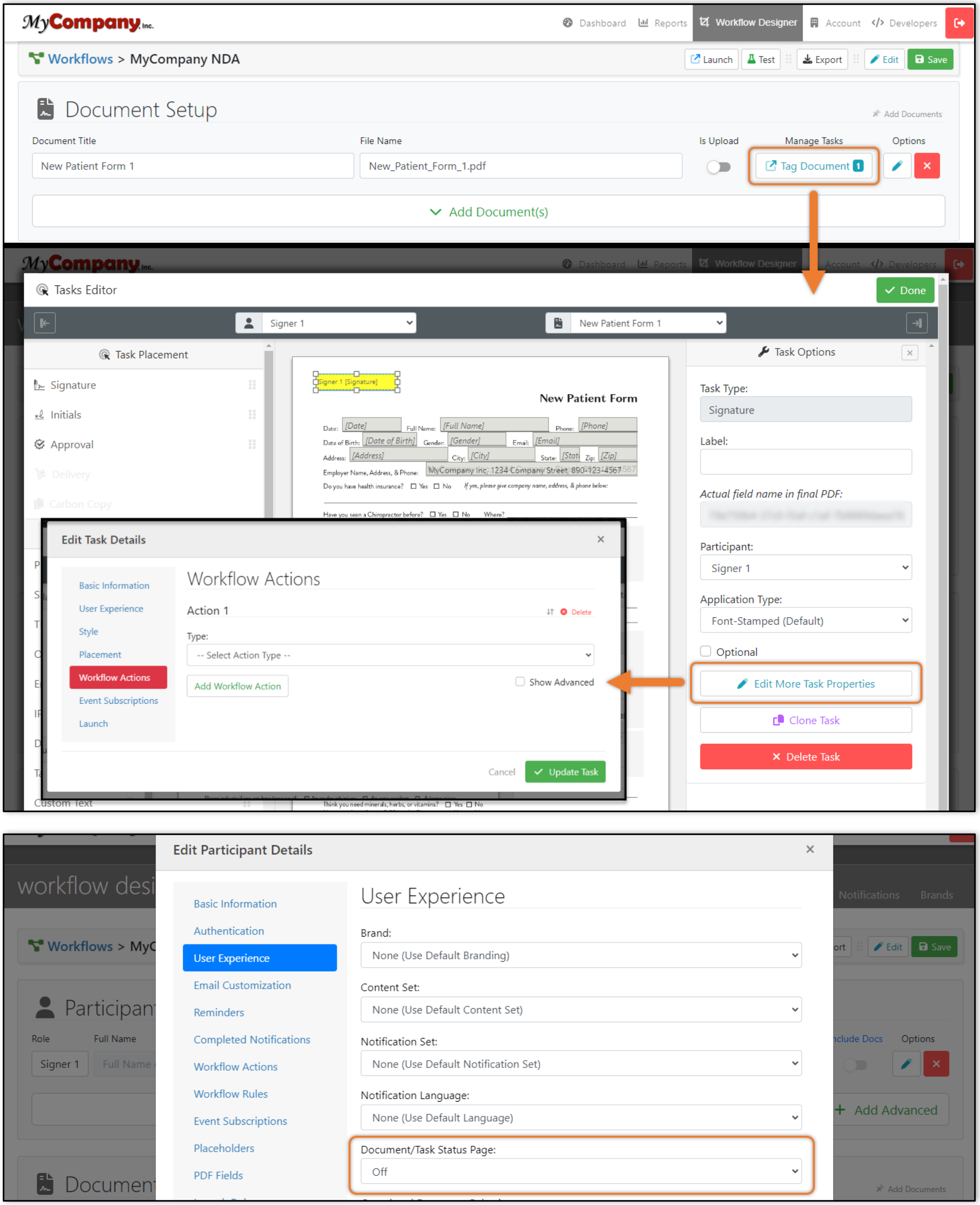
Fixed issue where API calls that were reusing document templates, that also pass in form field data merged into the document, were being incorrectly read from cache.

- **[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.

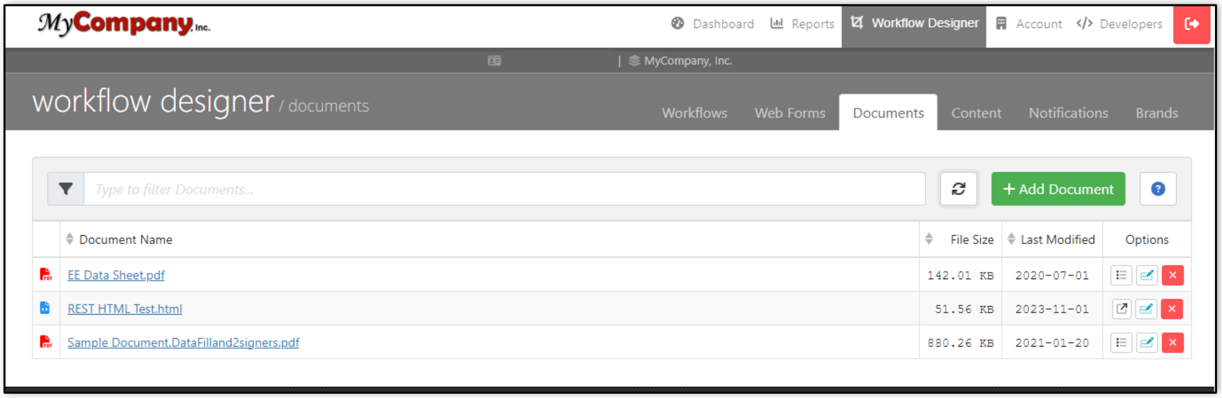


- **[PEP-7277]** ~Infrastructure ~Installer

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.

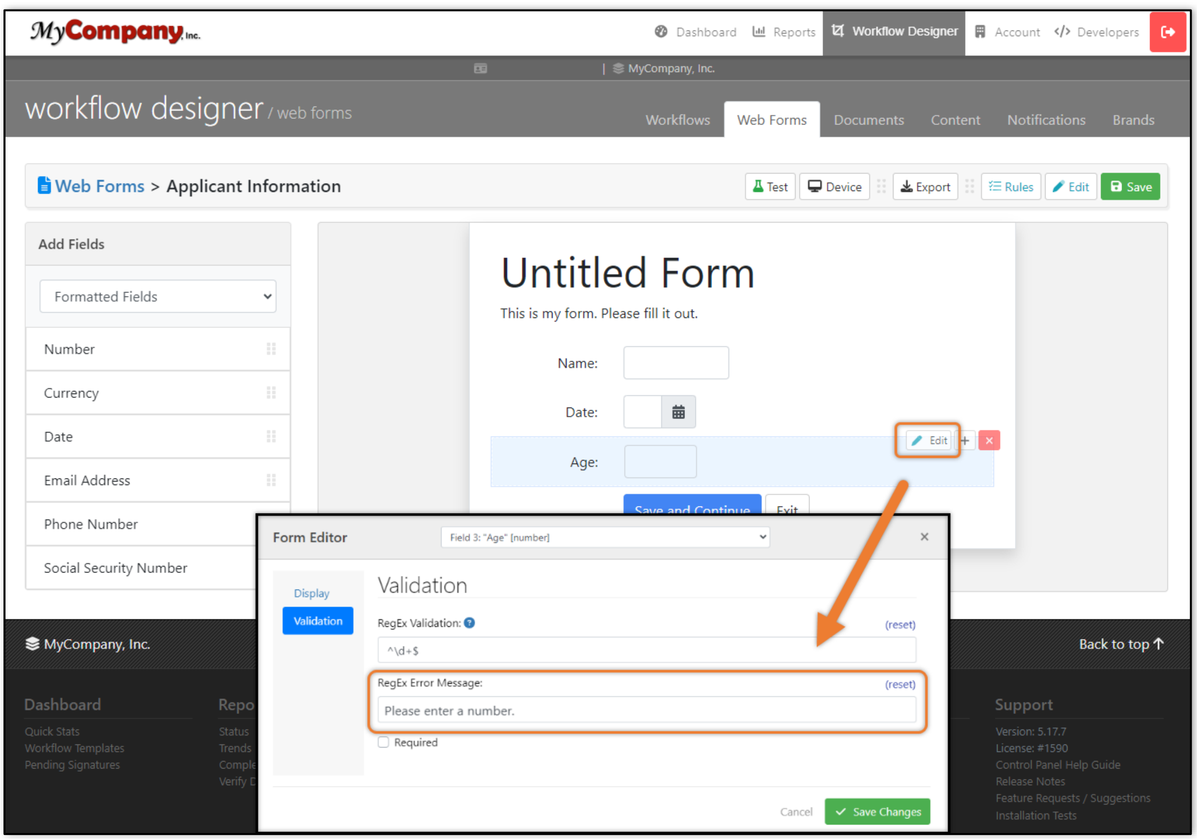
- **[PEP-7228]** ~ControlPanel ~Documents ~Workflows

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.

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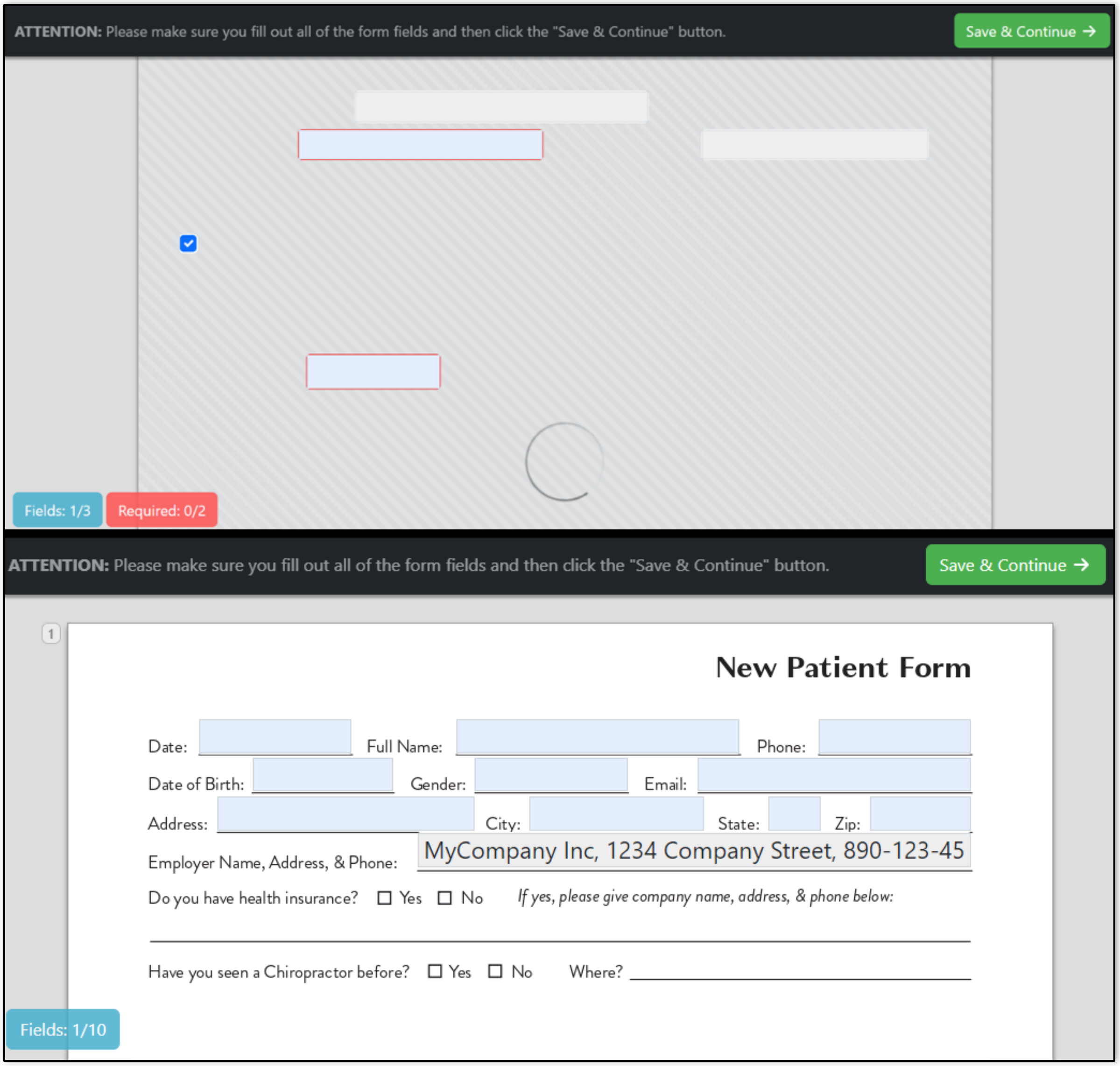
v5.17.8.1 Release *Release Date: 10/31/2023*

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.



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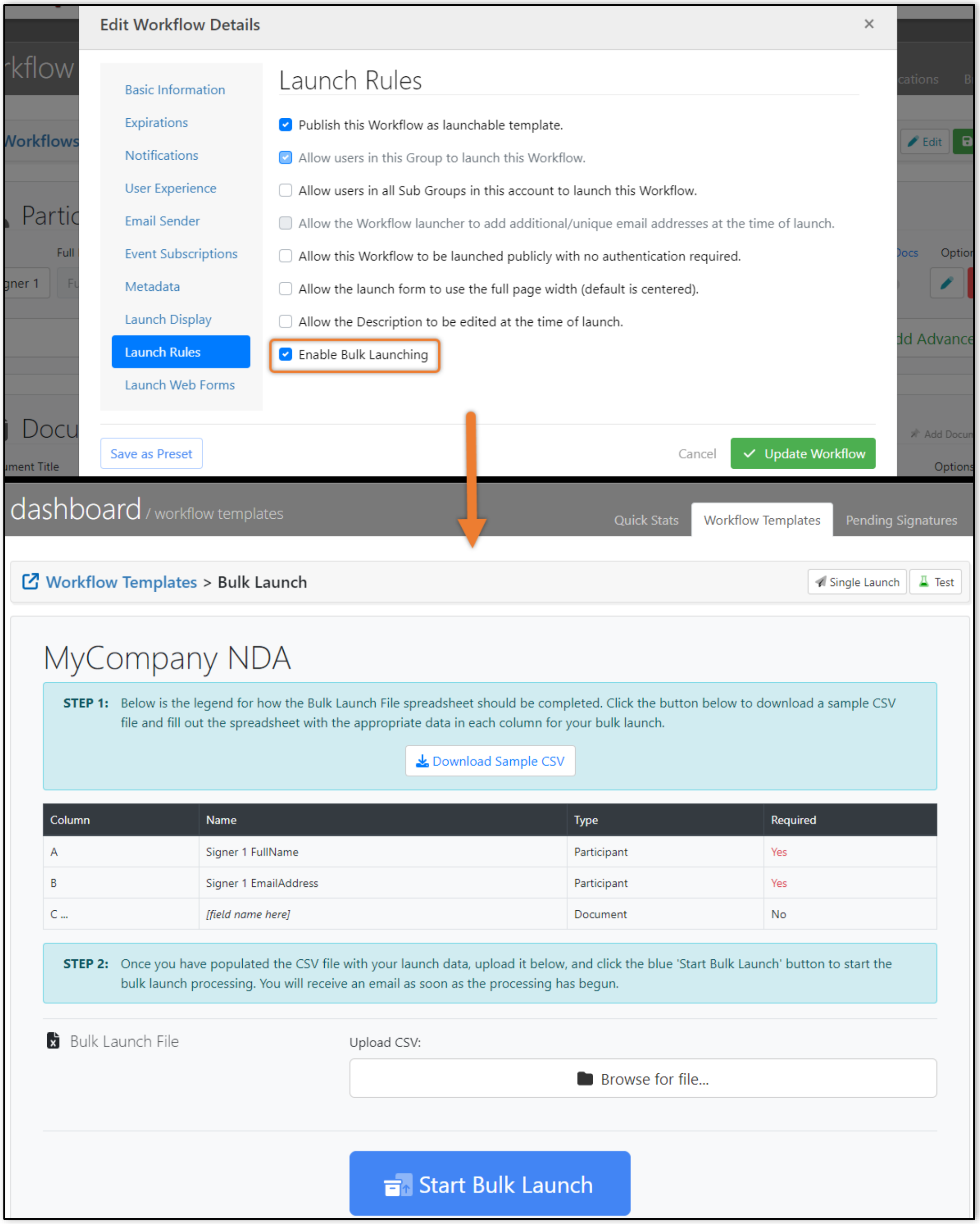
v5.17.8 Release *Release Date: 10/23/2023*

Bug Fixes

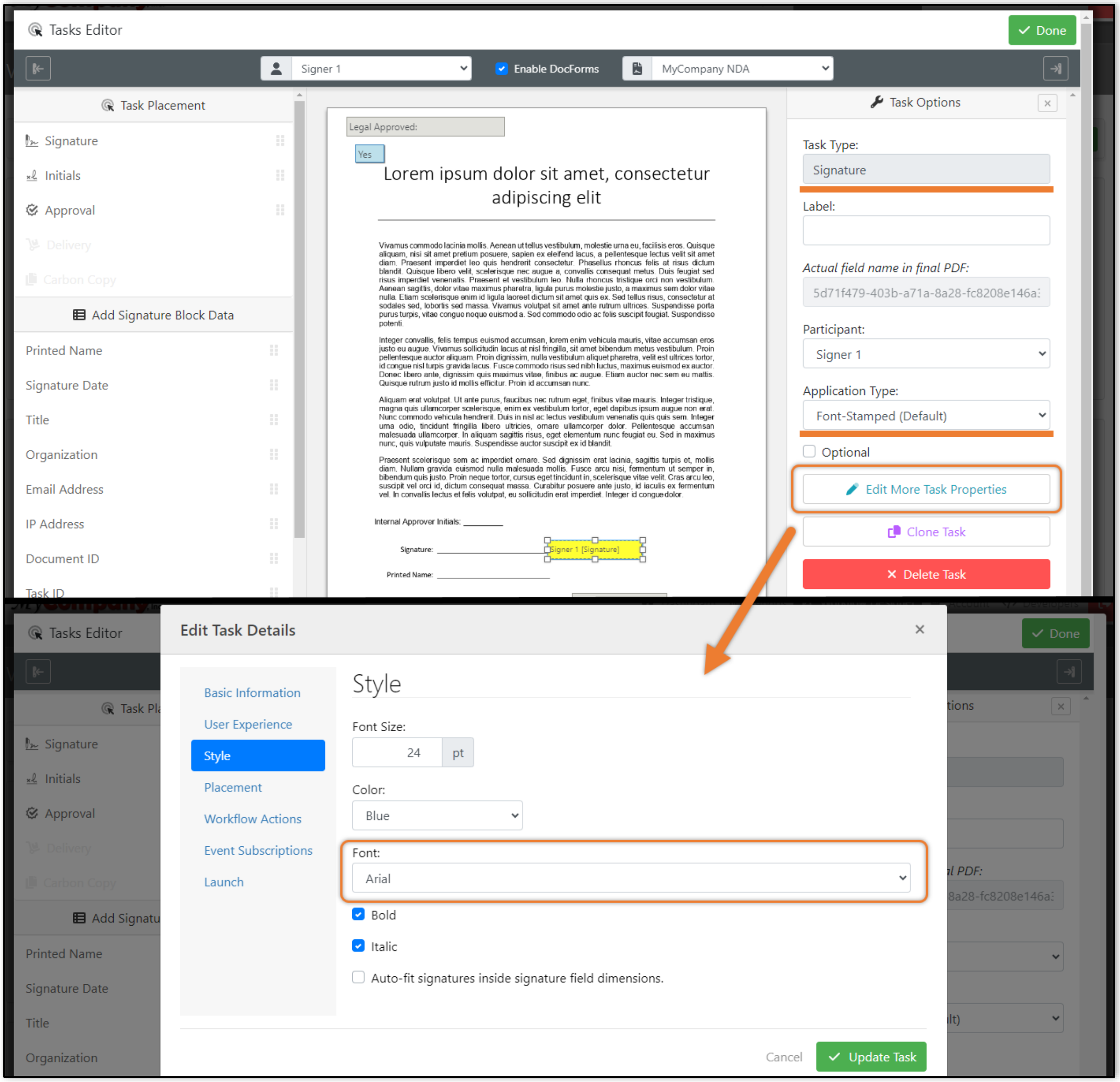
- **[PEP-7325]** ~ControlPanel ~Documents ~Workflows

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.



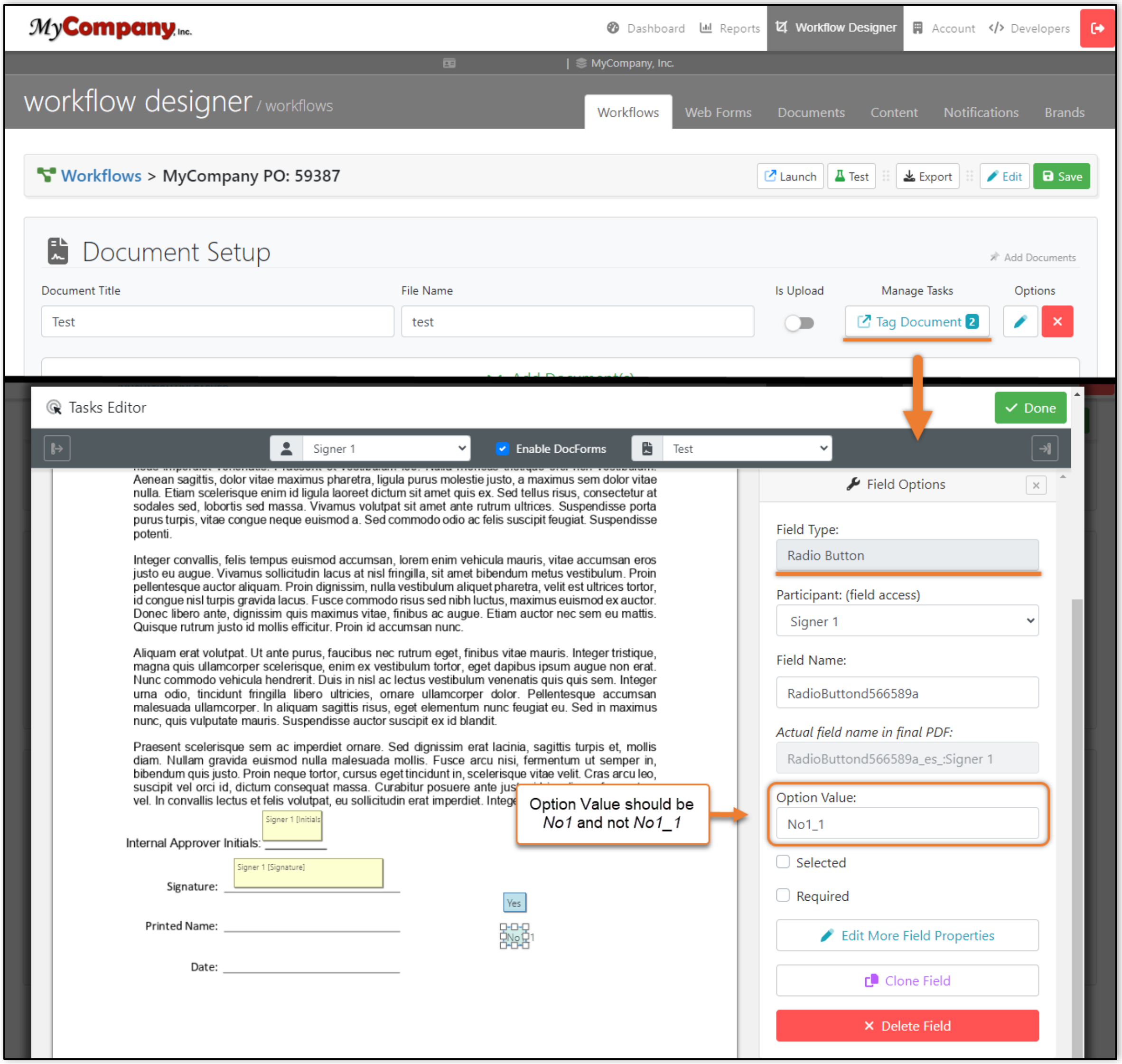
- **[PEP-7313]** ~Documents ~Signatures ~Signing ~UI/UX

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.



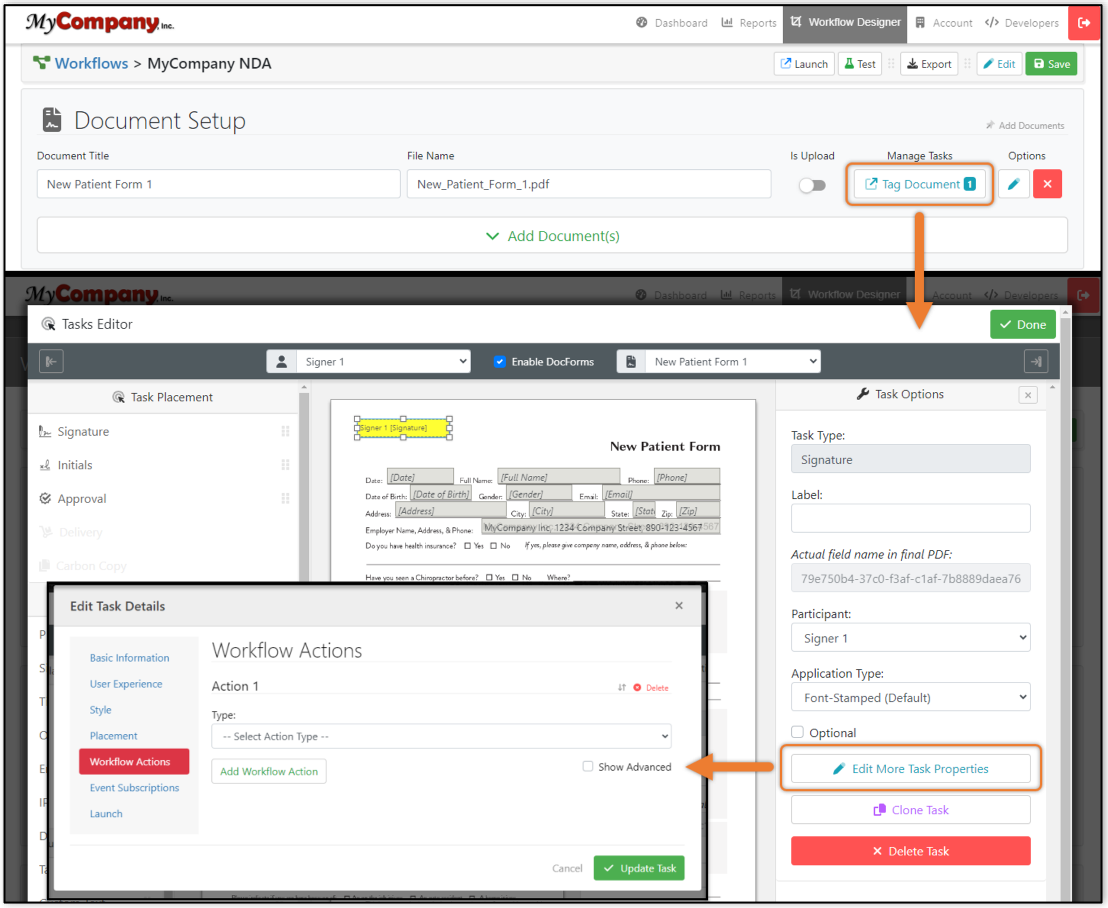
- **[PEP-7303]** ~ControlPanel ~Documents ~UI/UX ~Workflows

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.



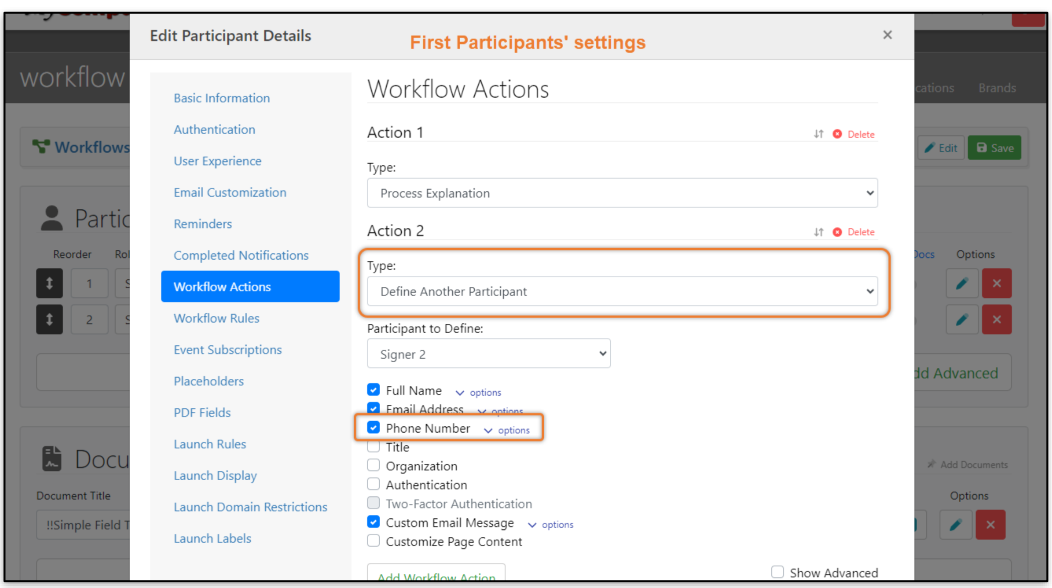
- **[PEP-7283]** ~WorkflowActions

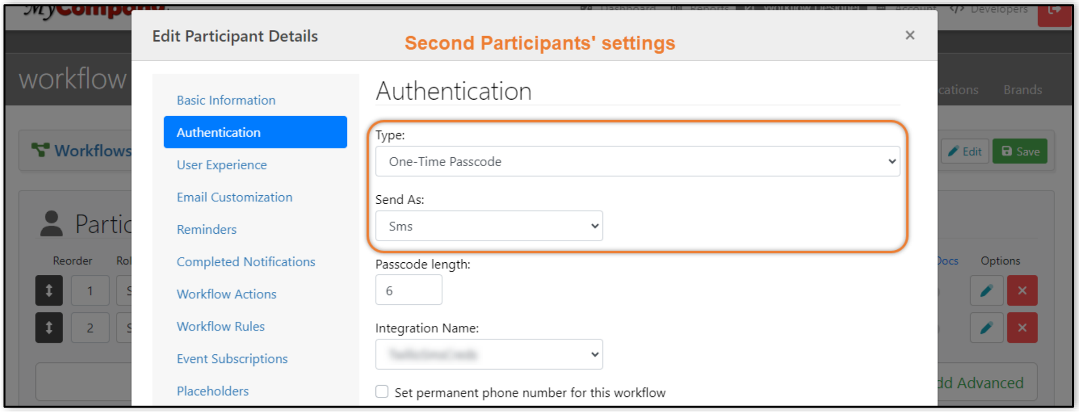
Fixed issue where Task Workflow Actions would be incorrectly skipped under certain conditions. The condition was if more than one document was included in the transaction and the task on the first document had a Workflow Action. Please see the settings referenced in the image below.



- **[PEP-7279]** ~Authentication ~WorkflowActions

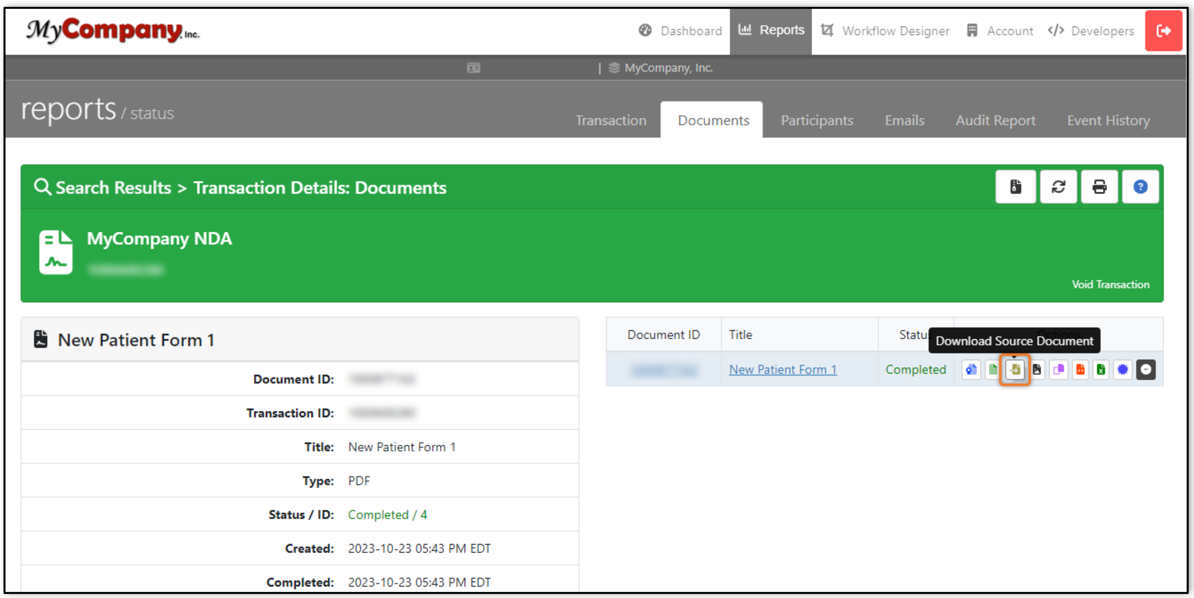
Fixed issue where when defining a participant's phone number for mobile authentication, the phone number entered would not be properly saved. Please see the settings referenced in the images below.





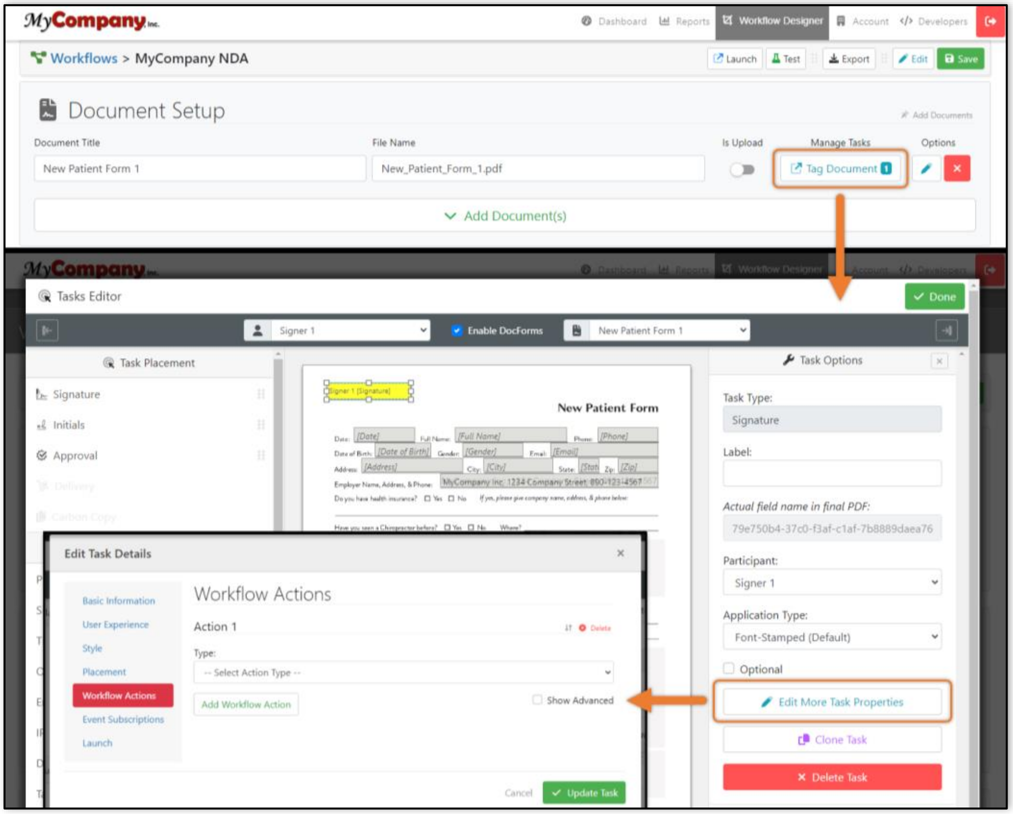
- **[PEP-7261]** ~Documents ~Transactions

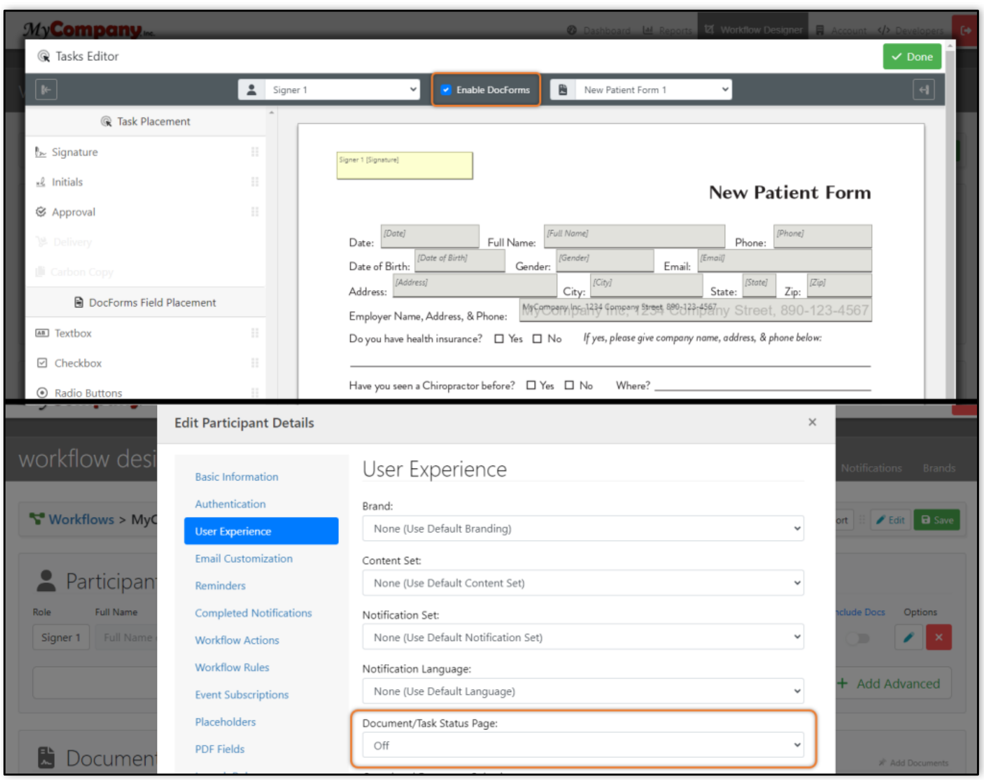
Fixed issue where when attempting to download the Source Document a user would receive an error message and the source document would not download. The Source document should be available to be downloaded. Please see the image below for the settings refenced.



- **[PEP-7253]** ~Forms ~UI/UX ~WorkflowActions

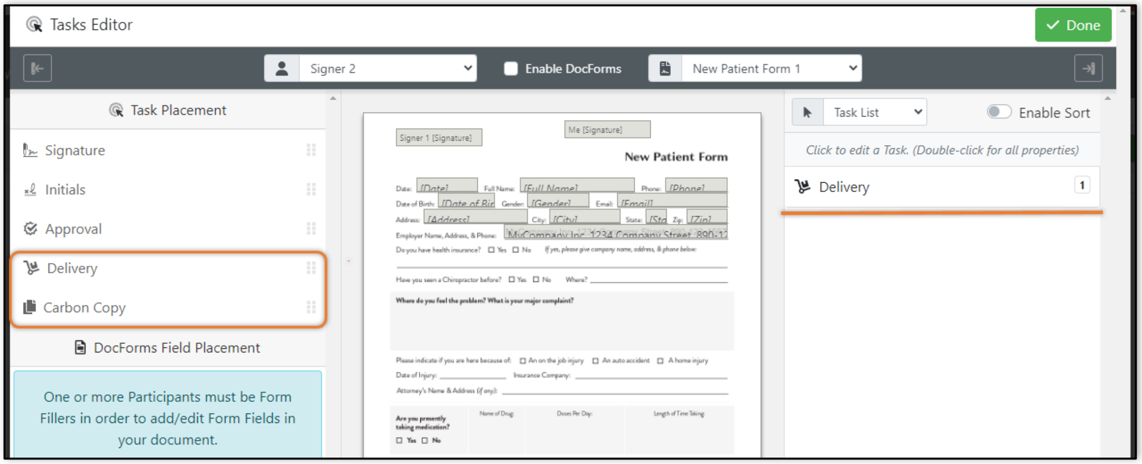
Fixed issue where Task Workflow Actions would be incorrectly skipped under certain conditions. The conditions included DocForms being enabled for a document or participant, and if the Status Page was set to off for the Participant. Please see the images below for the settings referenced.


MyCompany
Dashboard
Reports
Workflow Designer
Account
Developers
Workflows > MyCompany NDA
Launch
Test
Export
Edit
Save
Document Setup
Add Documents
Document Title
File Name
Is Upload
Manage Tasks
Options
New Patient Form 1
New_Patient_Form_1.pdf
Tag Document
Add Document(s)
Tasks Editor
Done
Signer 1
Enable DocForms
New Patient Form 1
Task Placement
Signature
Initials
Approval
Delivery
Carbon Copy
New Patient Form
Task Options
Task Type:
Signature
Label:
Actual field name in final PDF:
79e750b4-37c0-f3af-c1af-7b8889daea76
Participant:
Signer 1
Application Type:
Font-Stamped (Default)
Optional
Edit More Task Properties
Clone Task
Delete Task
Edit Task Details
Basic Information
User Experience
Style
Placement
Workflow Actions
Event Subscriptions
Launch
Workflow Actions
Action 1
Delete
Type:
-- Select Action Type --
Add Workflow Action
Show Advanced
Cancel
Update Task


MyCompany
Tasks Editor
Done
Signer 1
Enable DocForms
New Patient Form 1
Task Placement
Signature
Initials
Approval
Delivery
Carbon Copy
DocForms Field Placement
Textbox
Checkbox
Radio Buttons
New Patient Form
Date:
Full Name:
Phone:
Date of Birth:
Gender:
Email:
Address:
City:
State:
Zip:
Employer Name, Address, & Phone:
Do you have health insurance?
Yes
No
If yes, please give company name, address, & phone below:
Have you seen a Chiropractor before?
Where?
Edit Participant Details
Basic Information
Authentication
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

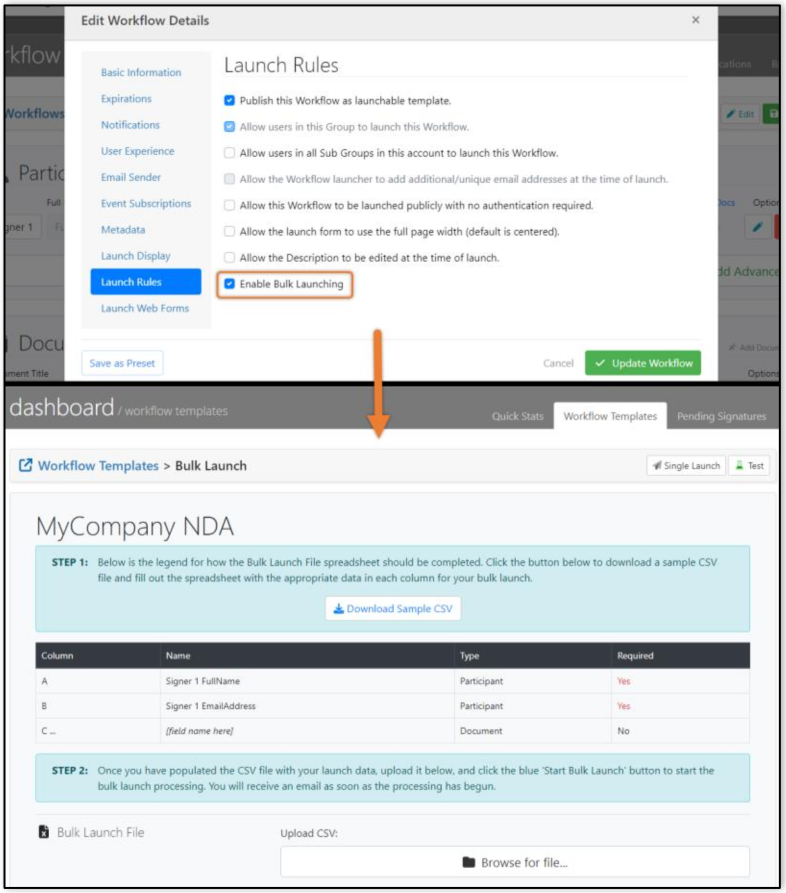
- **[PEP-7250]** ~WorkflowActions

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.



- **[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.



- **[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*

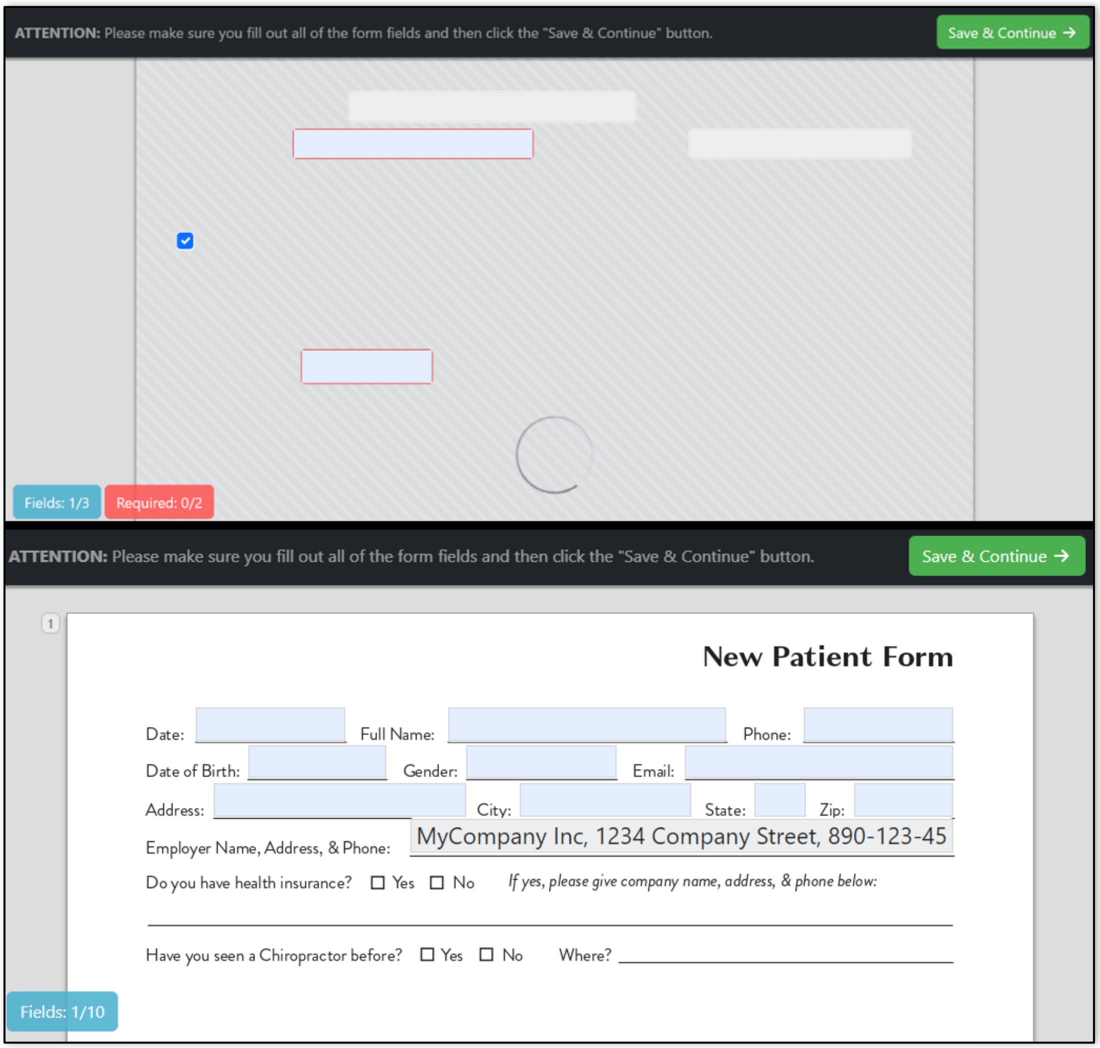
Important Notes:

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.

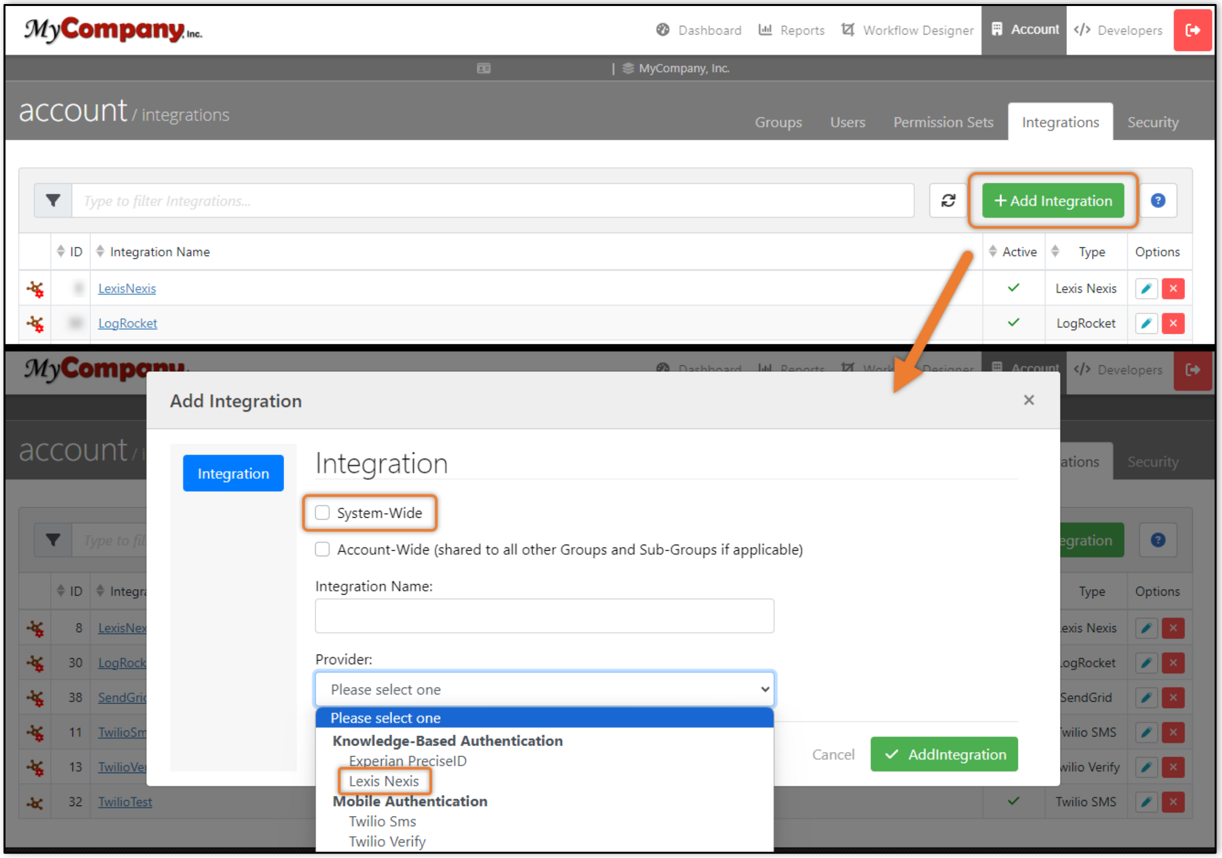


v5.17.7.1 Release *Release Date: 10/18/2023*

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.

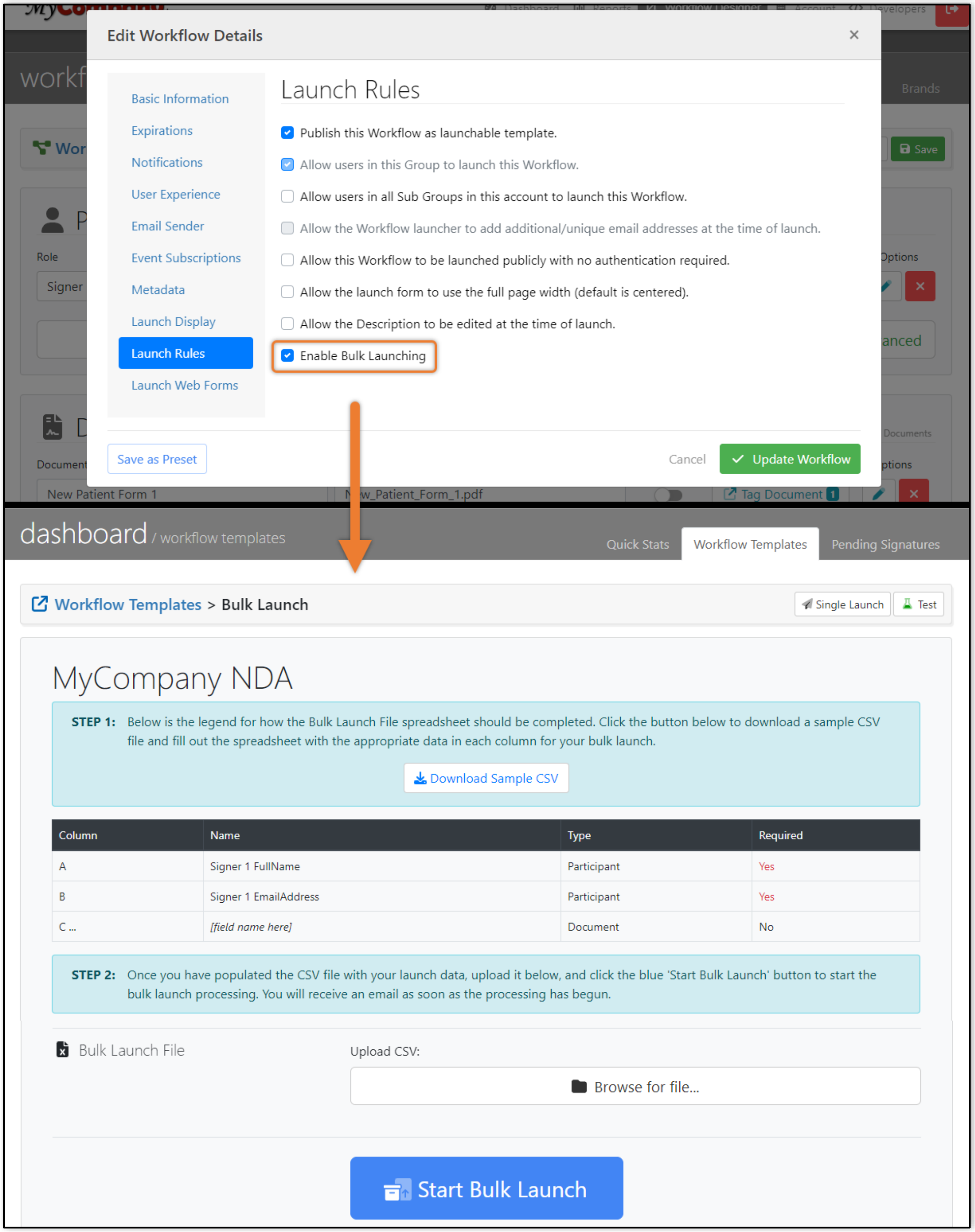


v5.17.7 Release *Release Date: 10/5/2023*

Bug Fixes

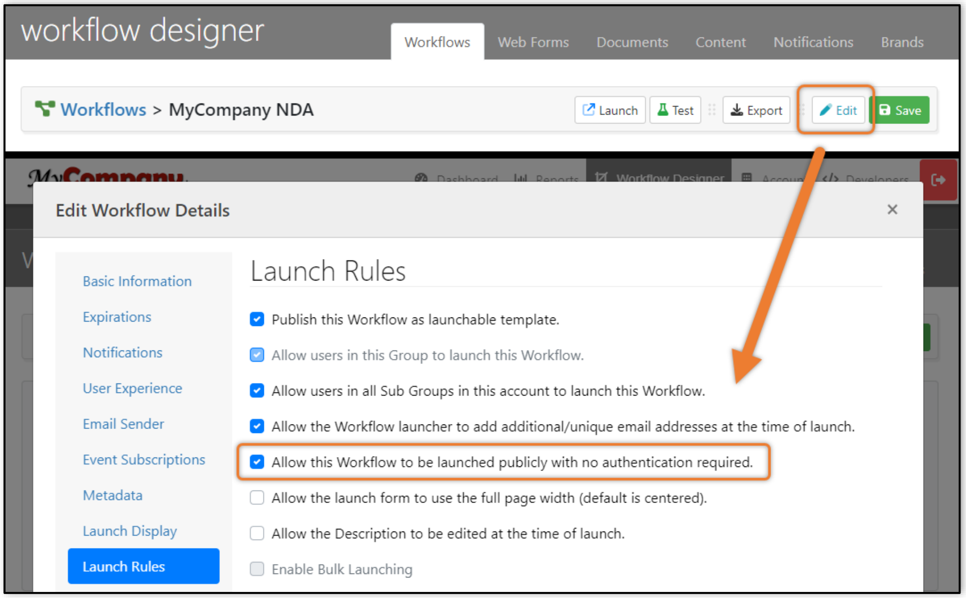
- **[PEP-7238]** ~ControlPanel ~UI/UX ~Workflows

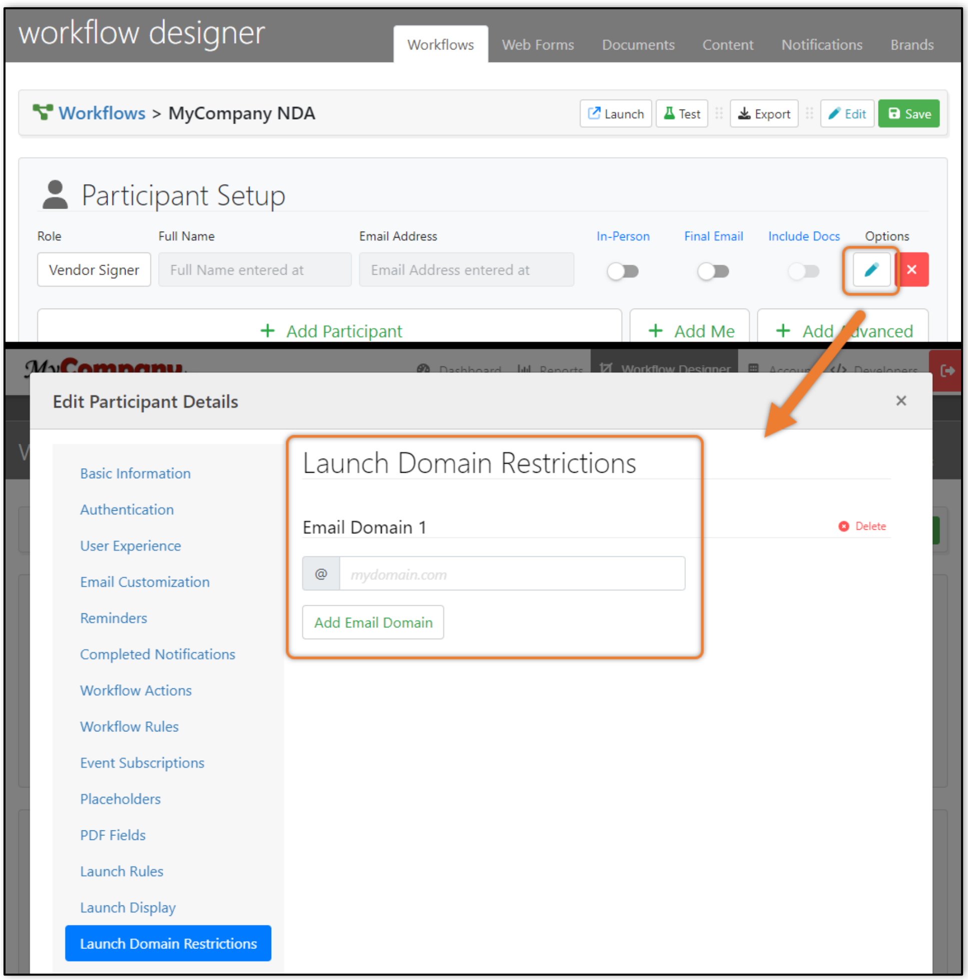
Fixed issue where errors were occurring on repeated Bulk-Launches of the same Workflow. Please see the image below for the settings referenced.



- **[PEP-7202]** ~ControlPanel ~Workflows

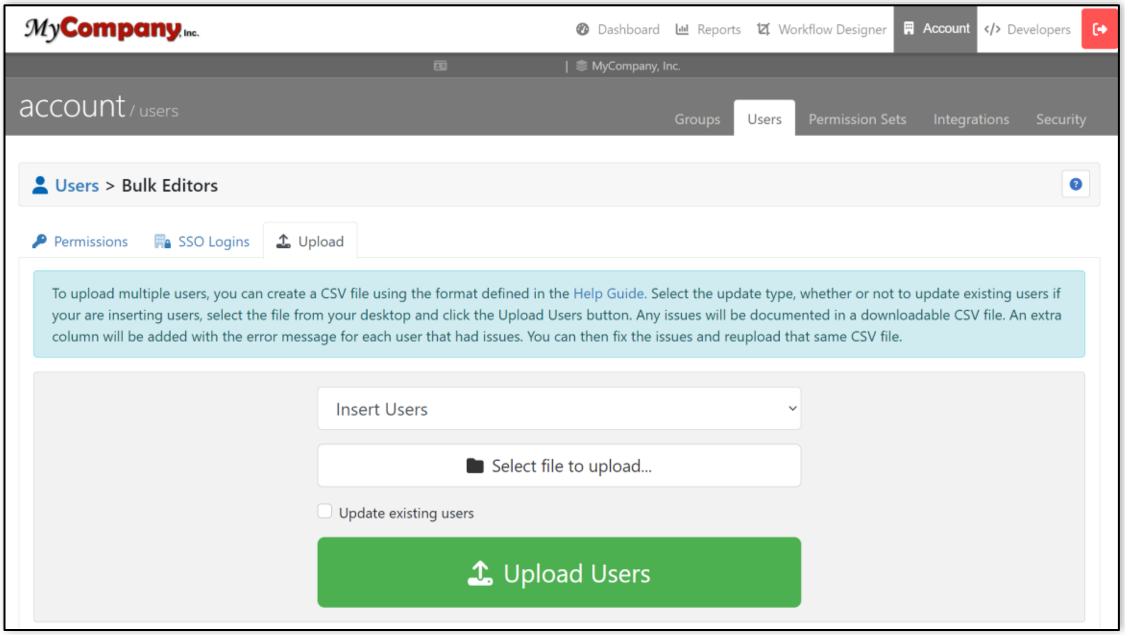
Fixed issue where Launch Domain Restrictions were preventing Workflows, with Public Launch, from launching. Please see the images below for the settings referenced.


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
Add Participant
Add Me
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
Delete
@
mydomain.com
Add Email Domain

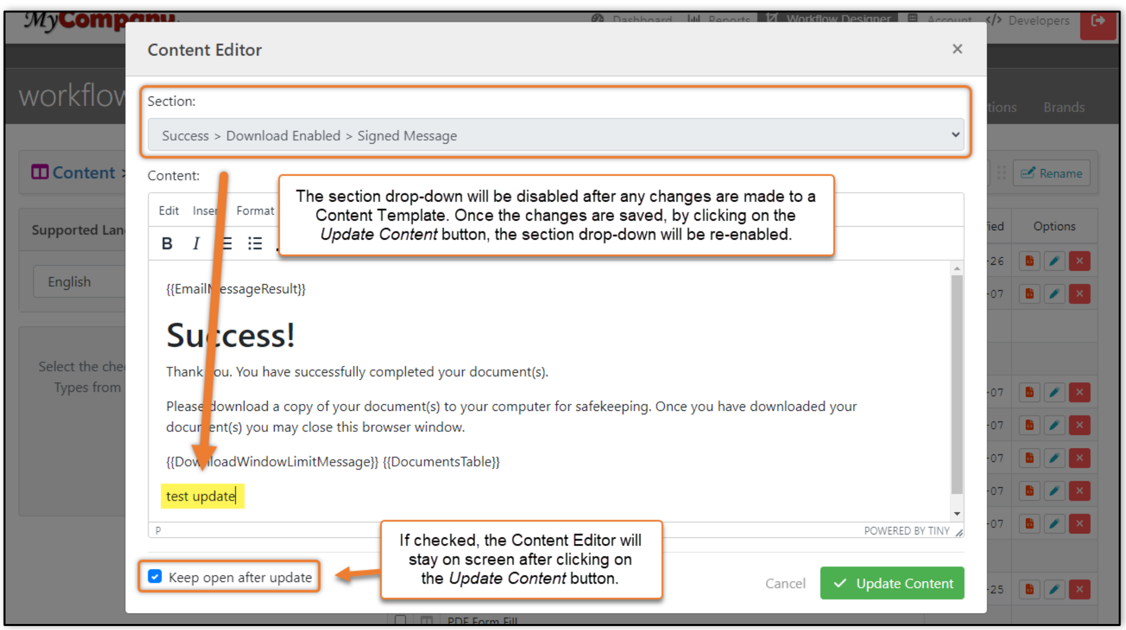
- **[PEP-7111]** ~ControlPanel ~Users

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.



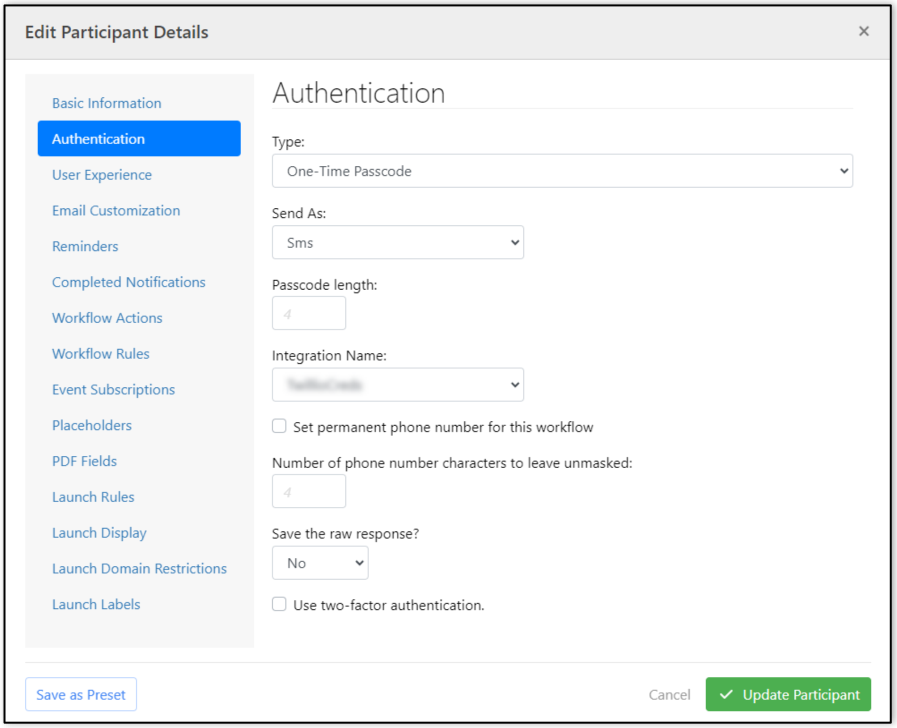
- **[PEP-6642]** ~ContentSets ~ControlPanel ~UI/UX

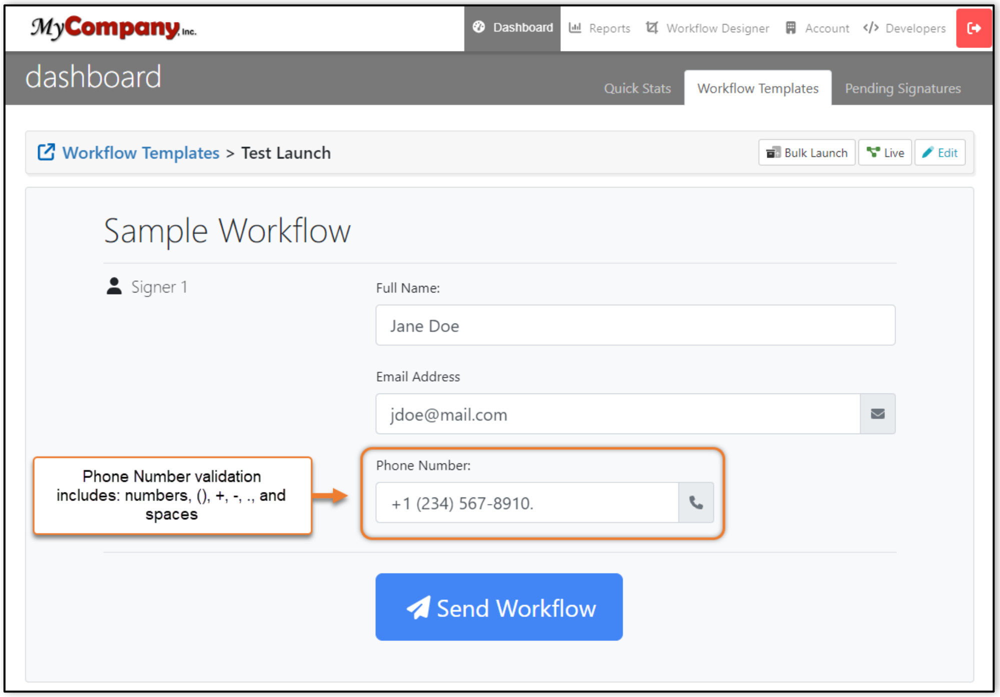
Fixed issue where a user could edit a Content Set and freely switch between sections before saving any changes that were made. If a user switched sections while making changes, the editor would only save the last section that was edited. The Content Template editor will now prevent switching sections 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.

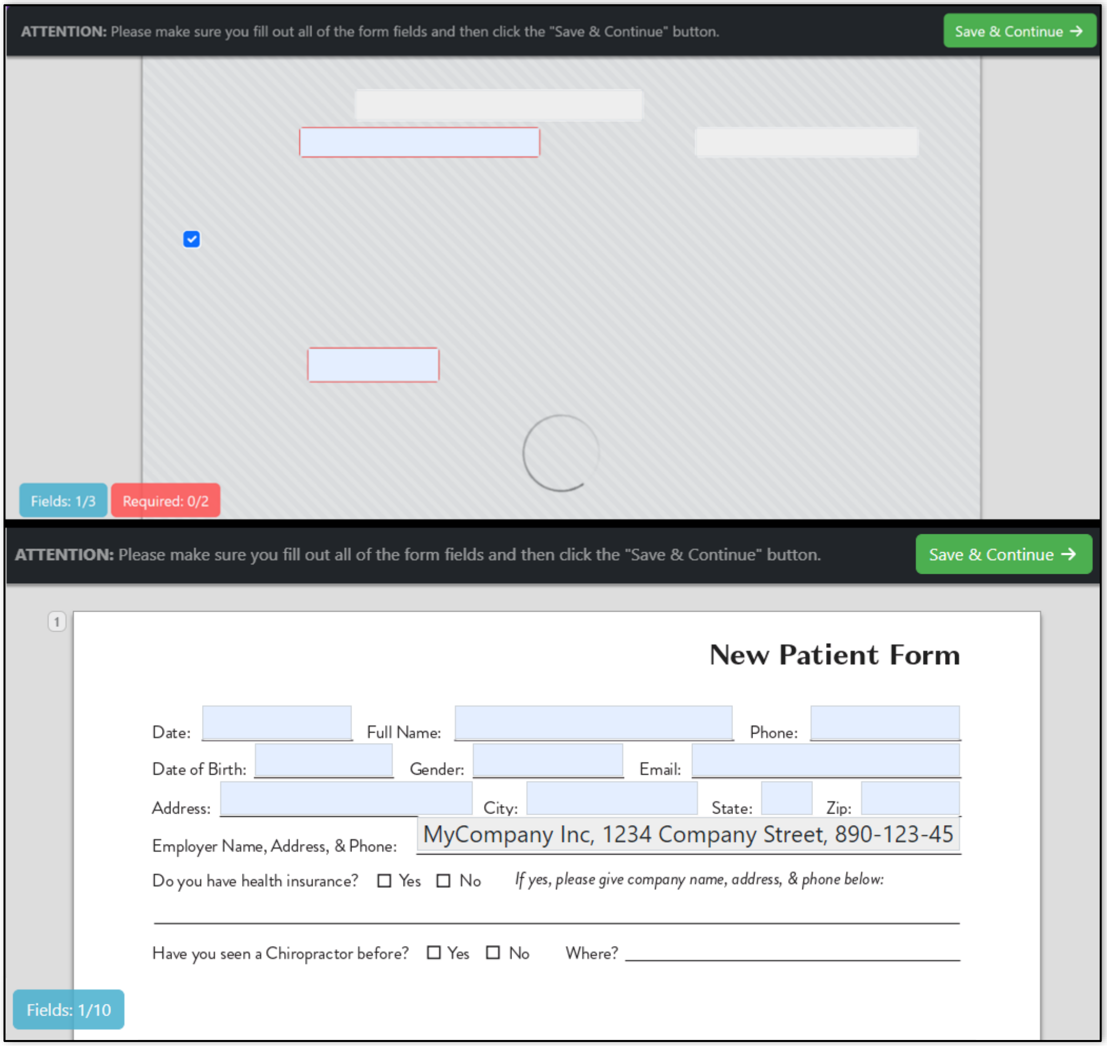
v5.17.6.1 Release *Release Date: 10/26/2023*

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.

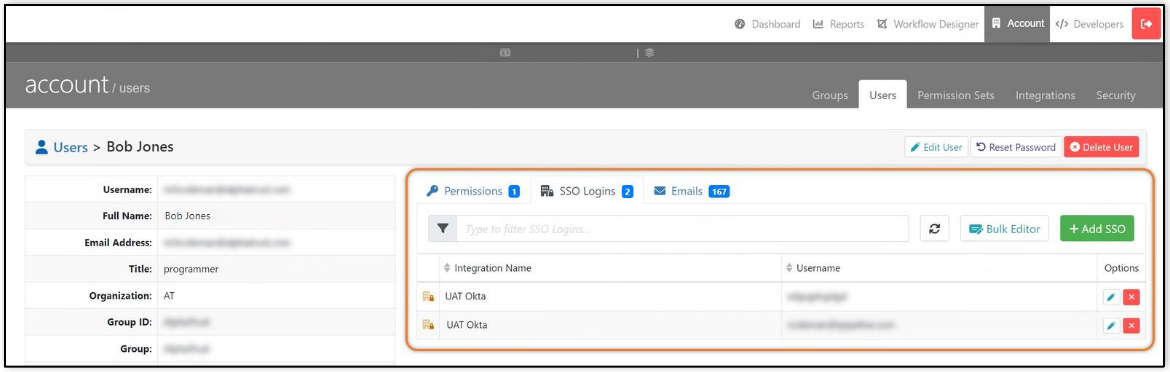


v5.17.6 Release *Release Date: 9/21/2023*

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.

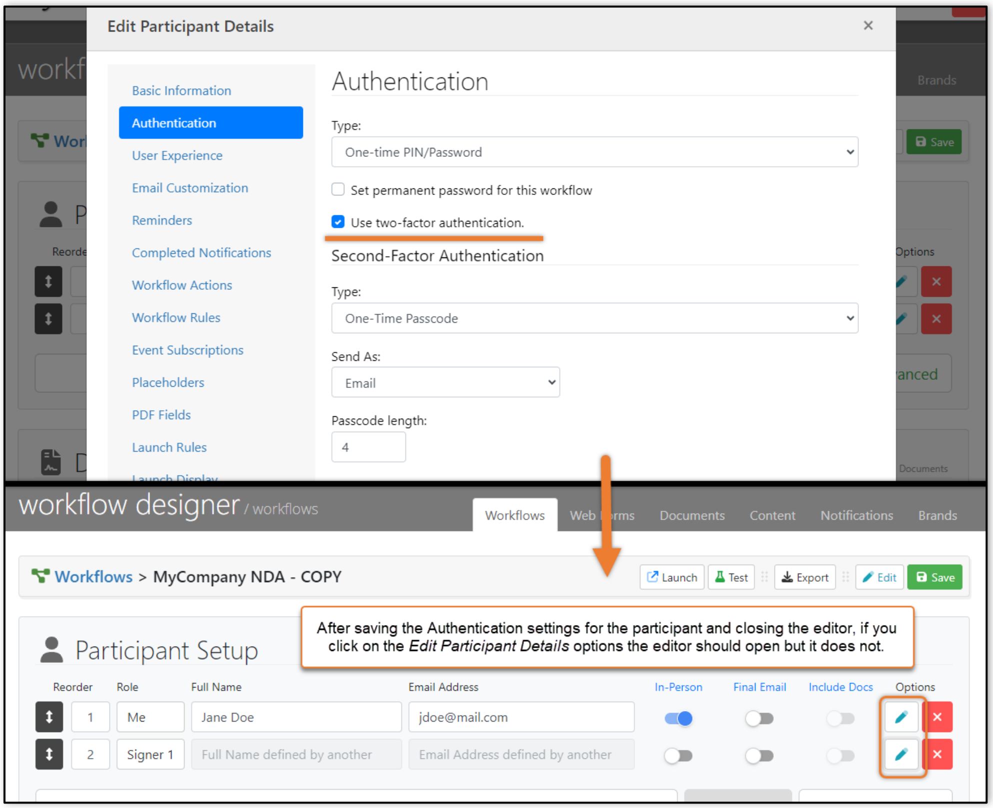


- **[PEP-7229]** ~API/WebServices

Fixed issue where an HTTP status code of 500 was occasionally returned when creating transactions under load.

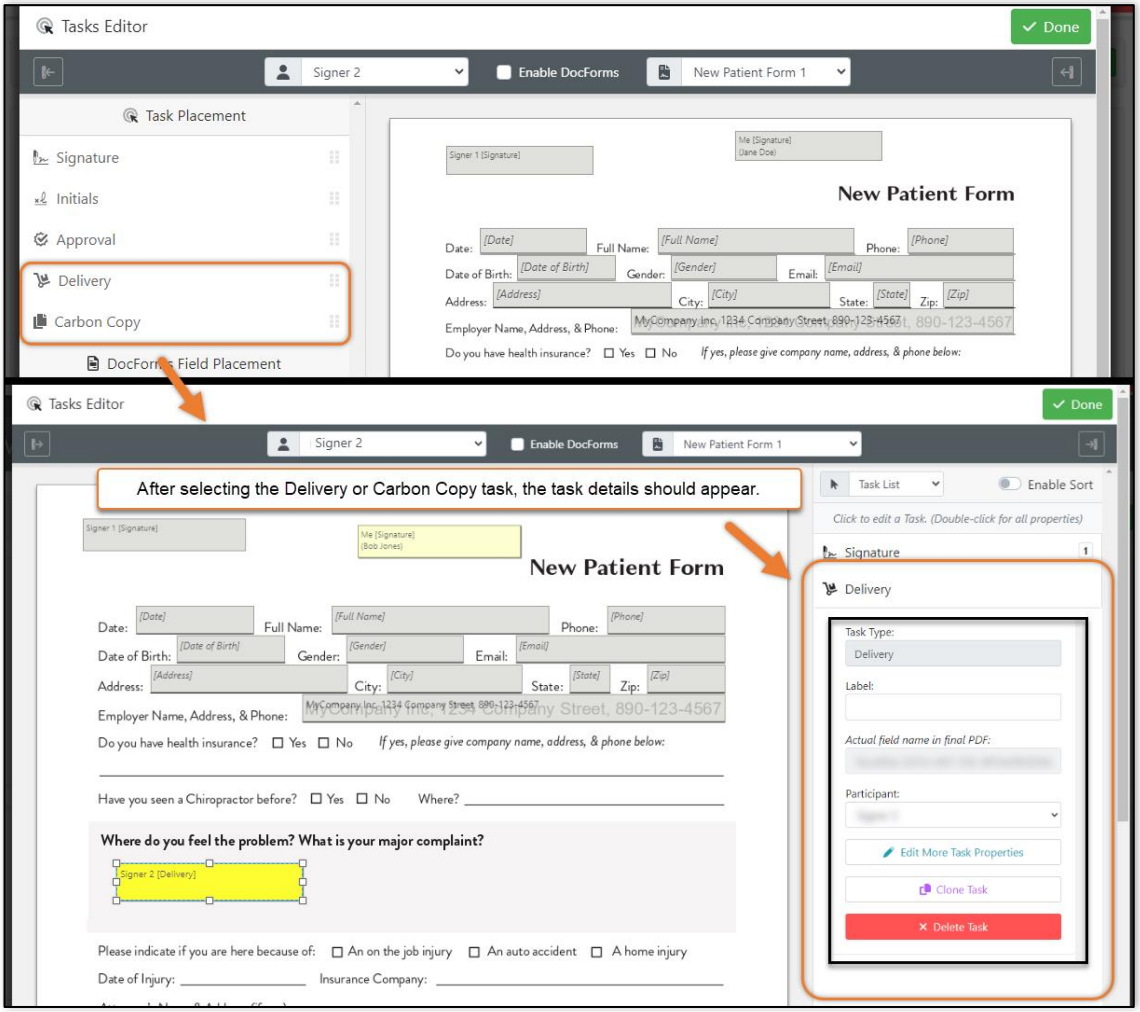
- **[PEP-7213]** ~ControlPanel ~Workflows

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.



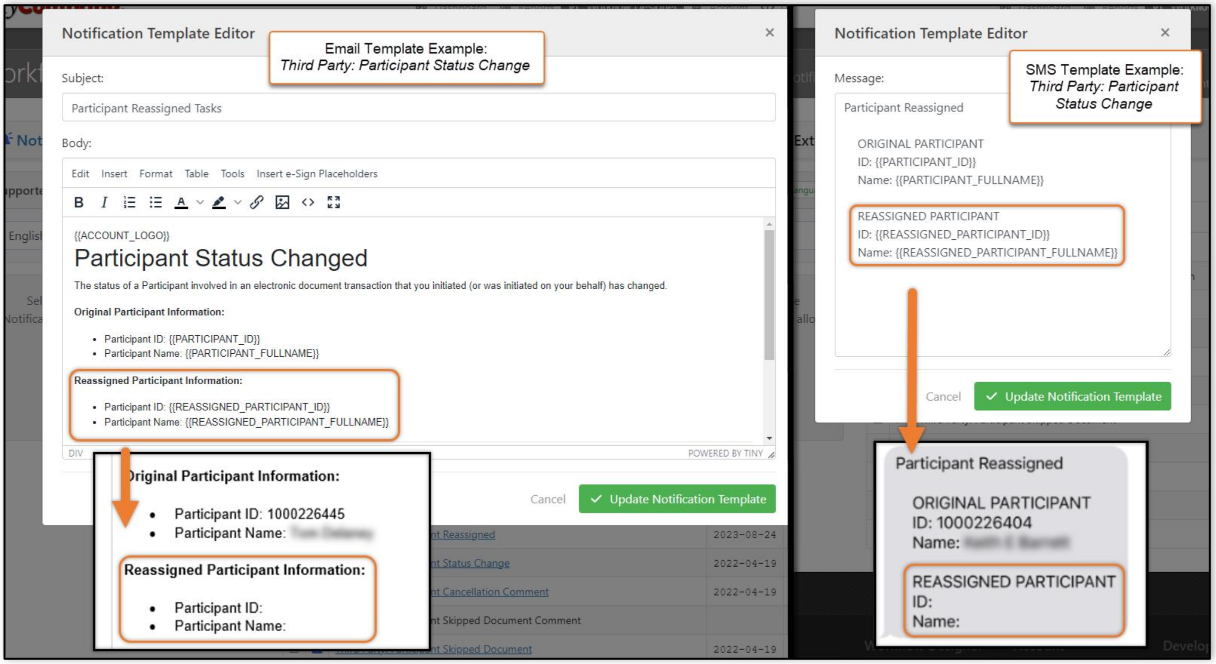
- **[PEP-7211]** ~ControlPanel ~Documents ~UI/UX ~Workflows

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.



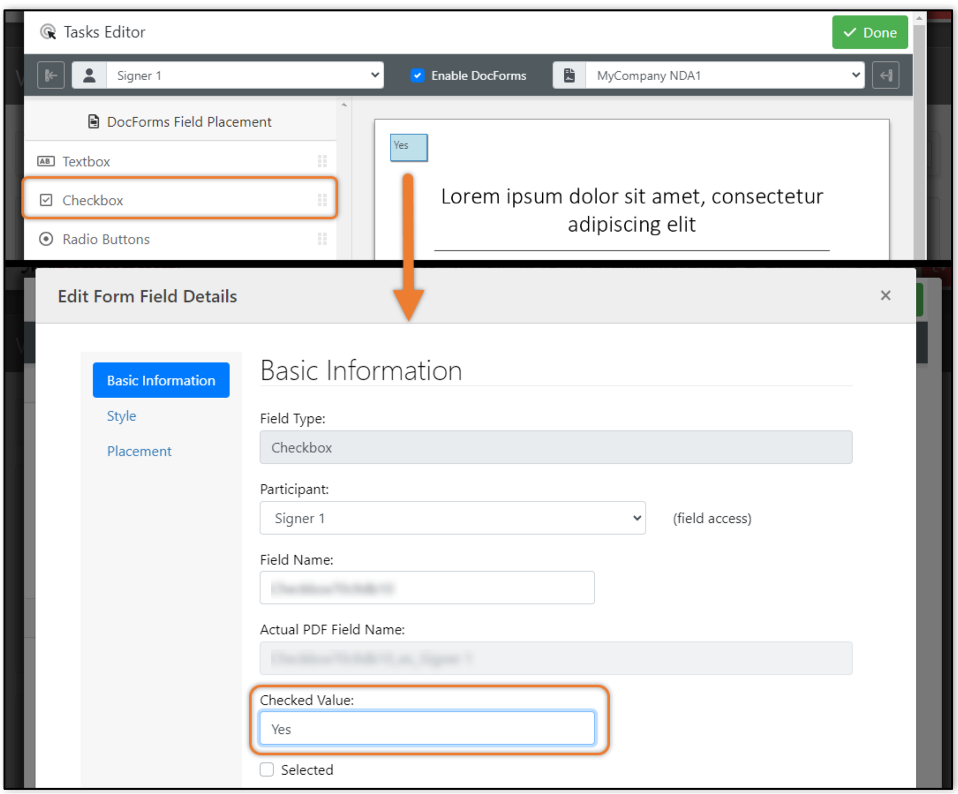
- **[PEP-7177]** ~EventSubscriptions

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*

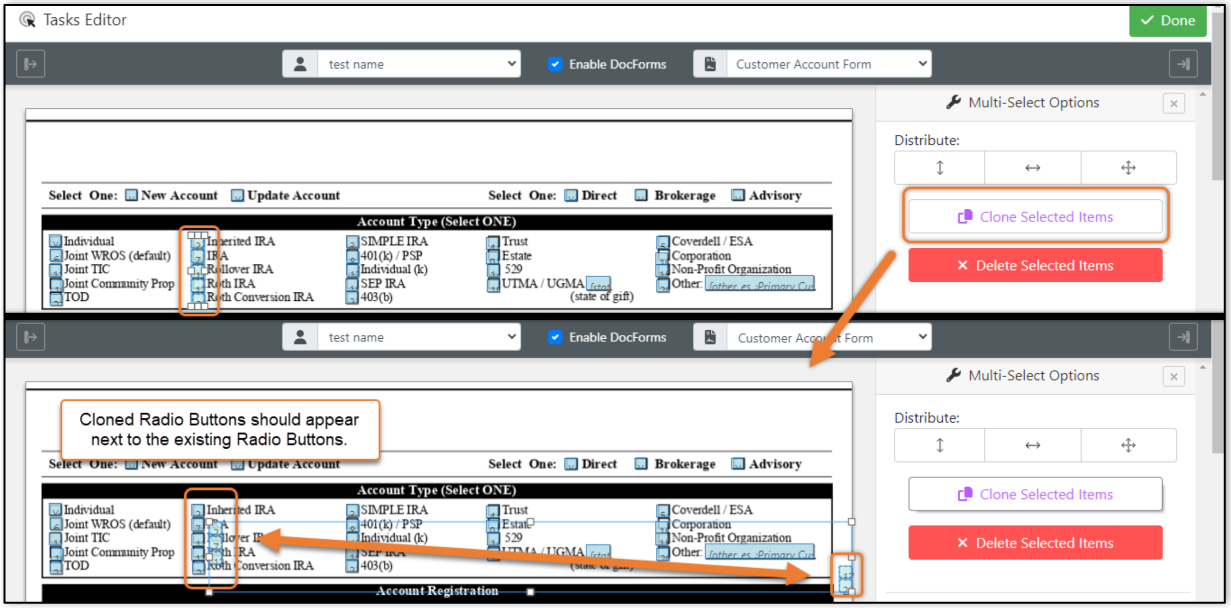
Bug Fixes

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

Fixed issue where PDF documents were not being merged properly.

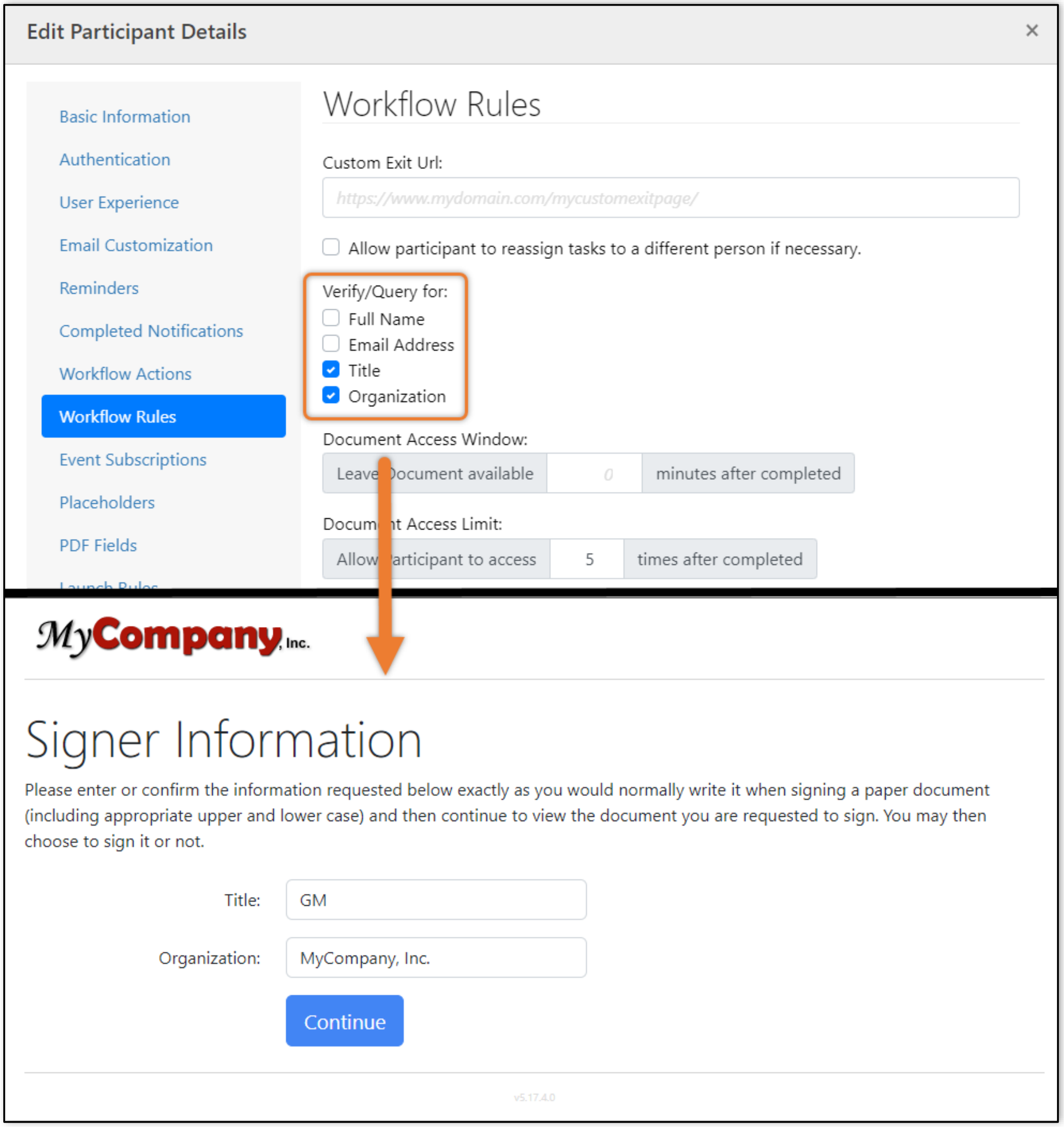
- **[PEP-7186]** ~Forms

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



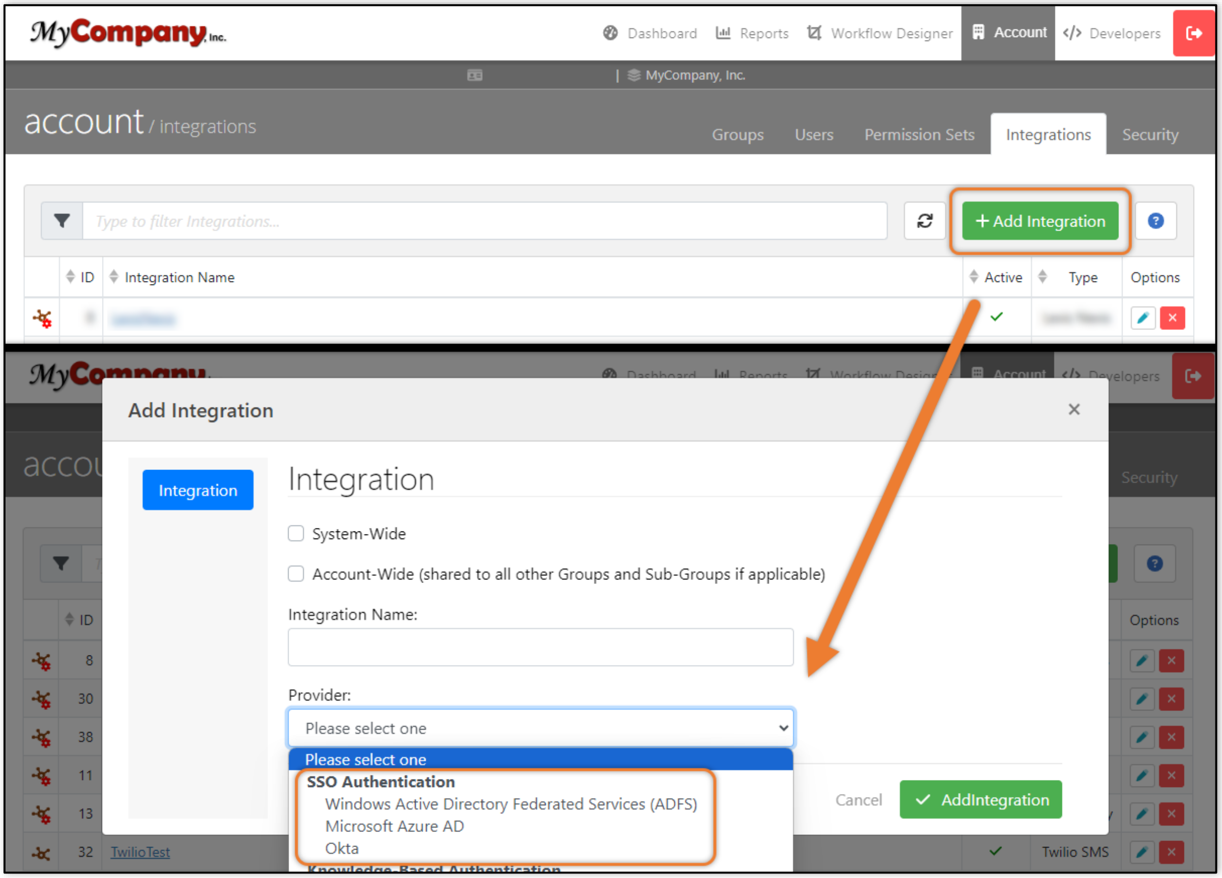
- **[PEP-7180]** ~API/WebServices ~Metadata ~Transactions ~Workflows

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.



- **[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.

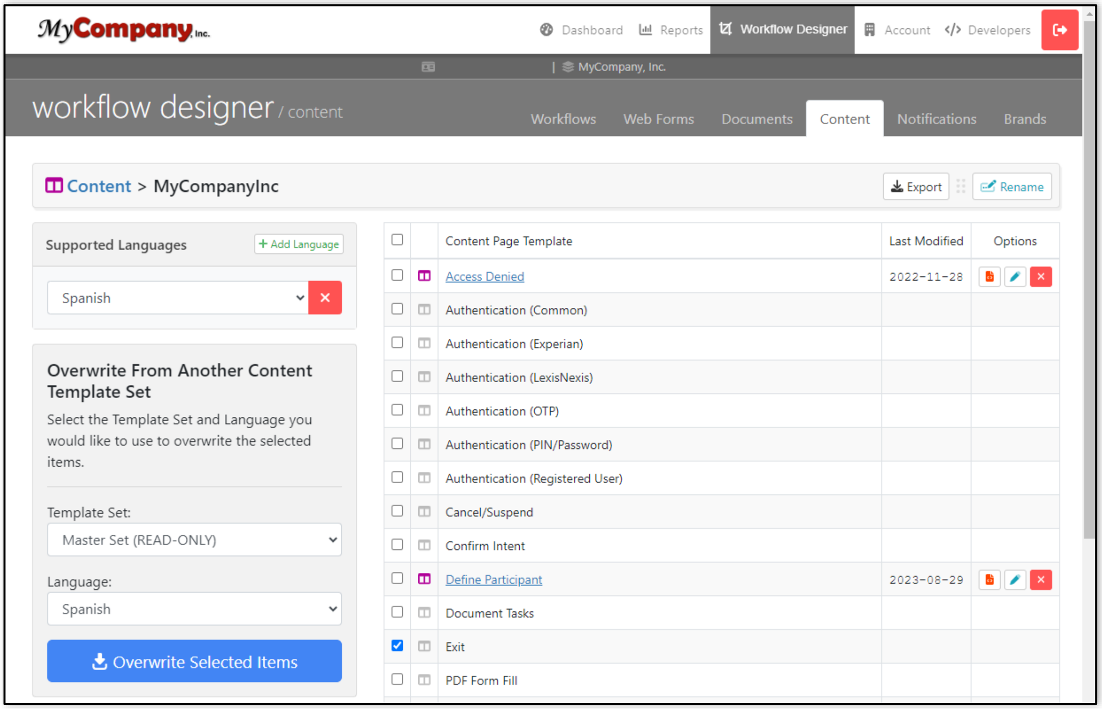


- **[PEP-7138]** ~Workflows

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.

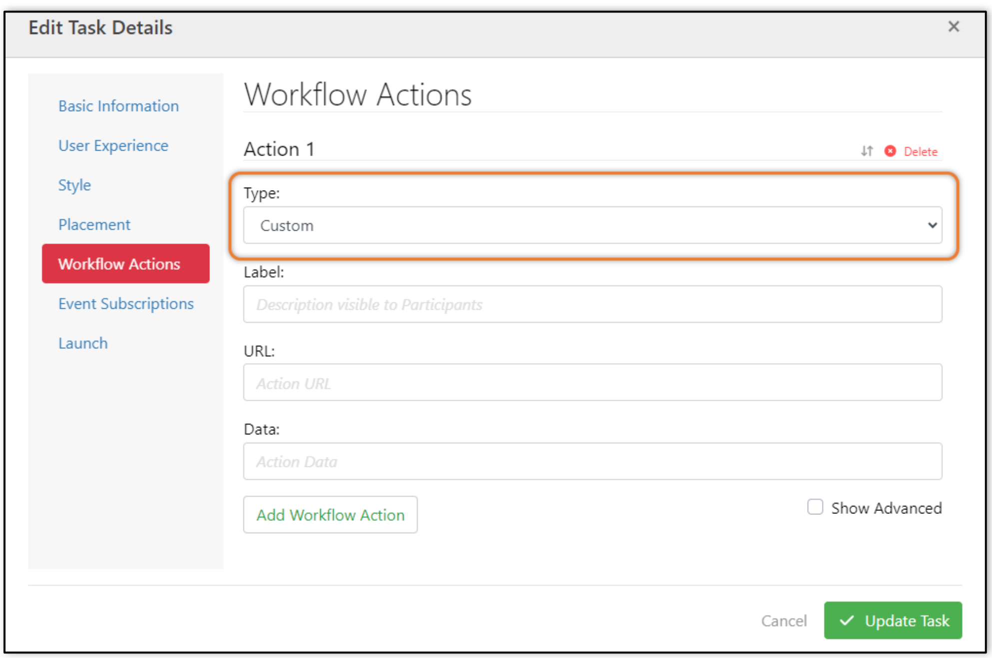


v5.17.4 Release ***Release Date: 8/25/2023***

Bug Fixes

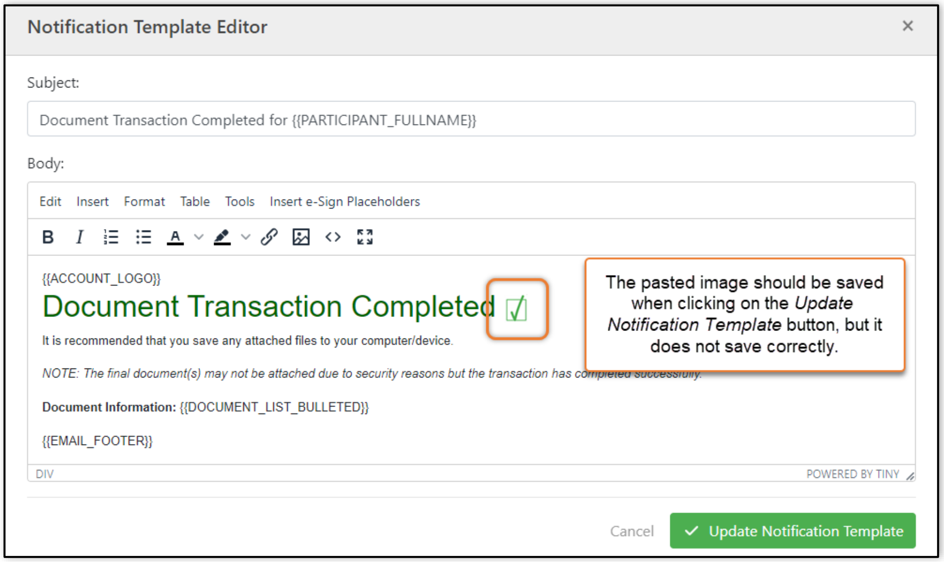
- **[PEP-7166]** ~Signing ~WorkflowActions

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.

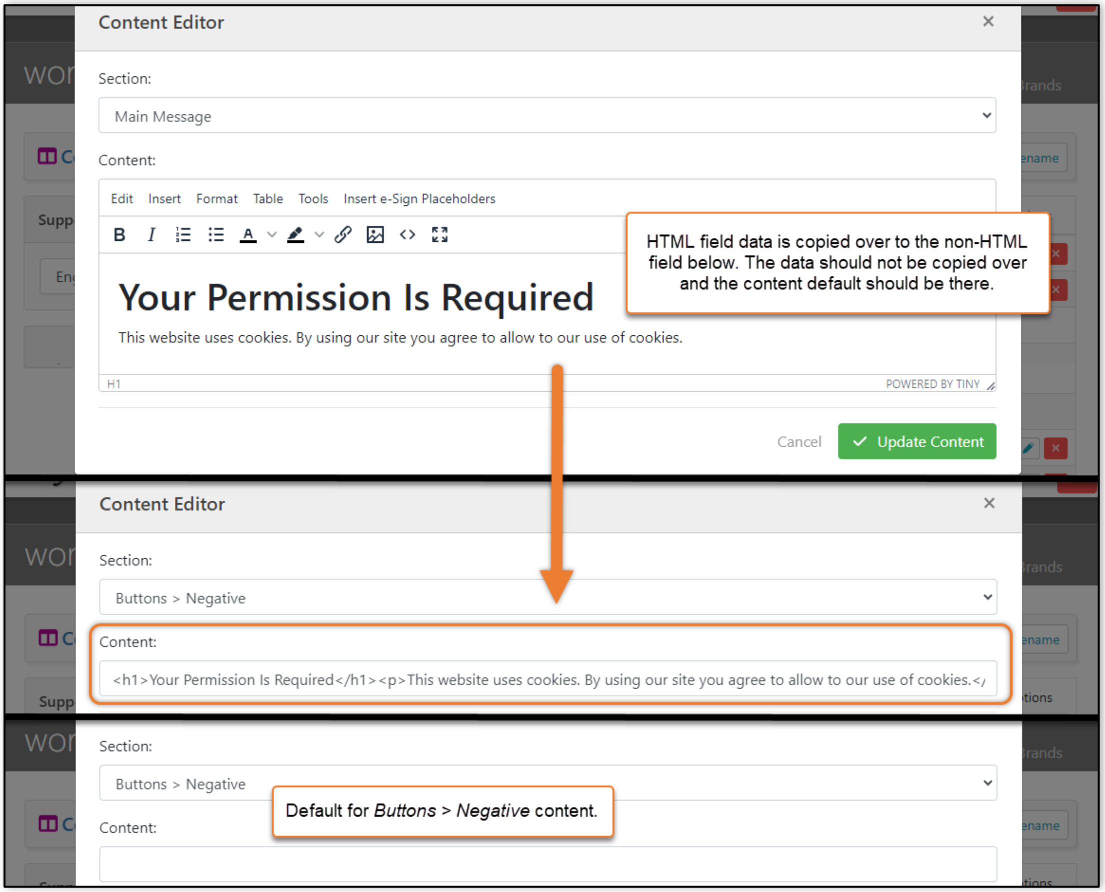


- **[PEP-7123]** ~Installer ~Signing

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.

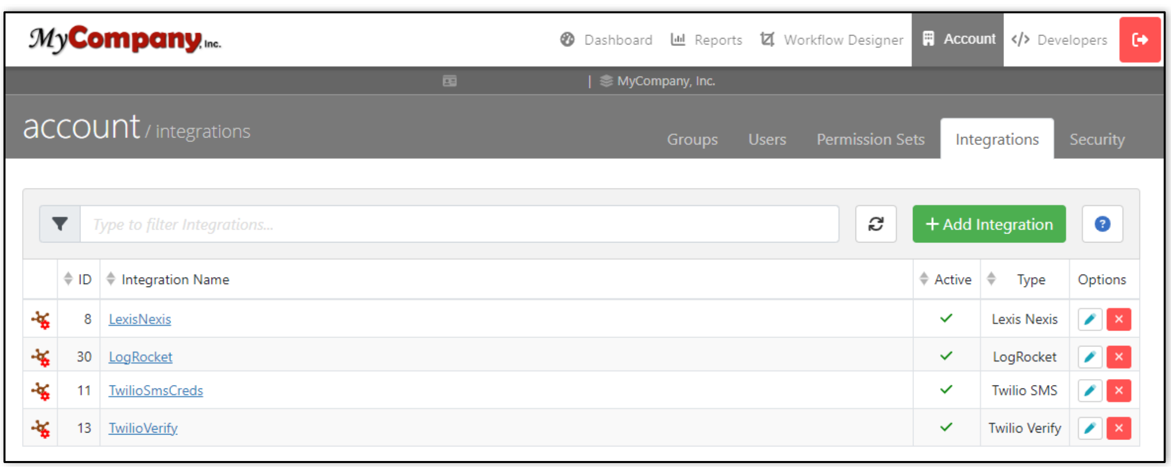
- **[PEP-7118]** ~ContentSets ~ControlPanel

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.



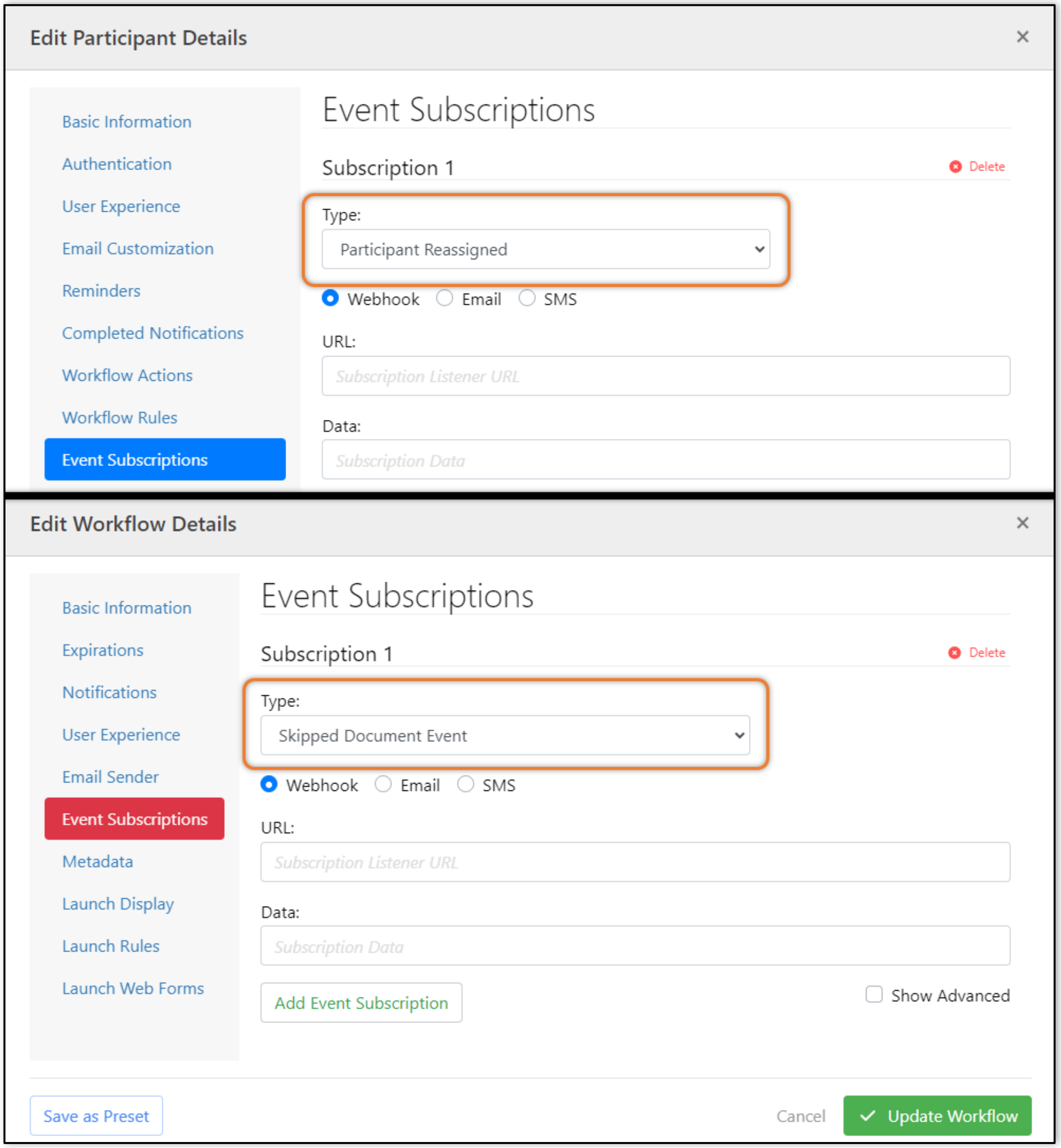
- **[PEP-7106]** ~Integrations ~UI/UX

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



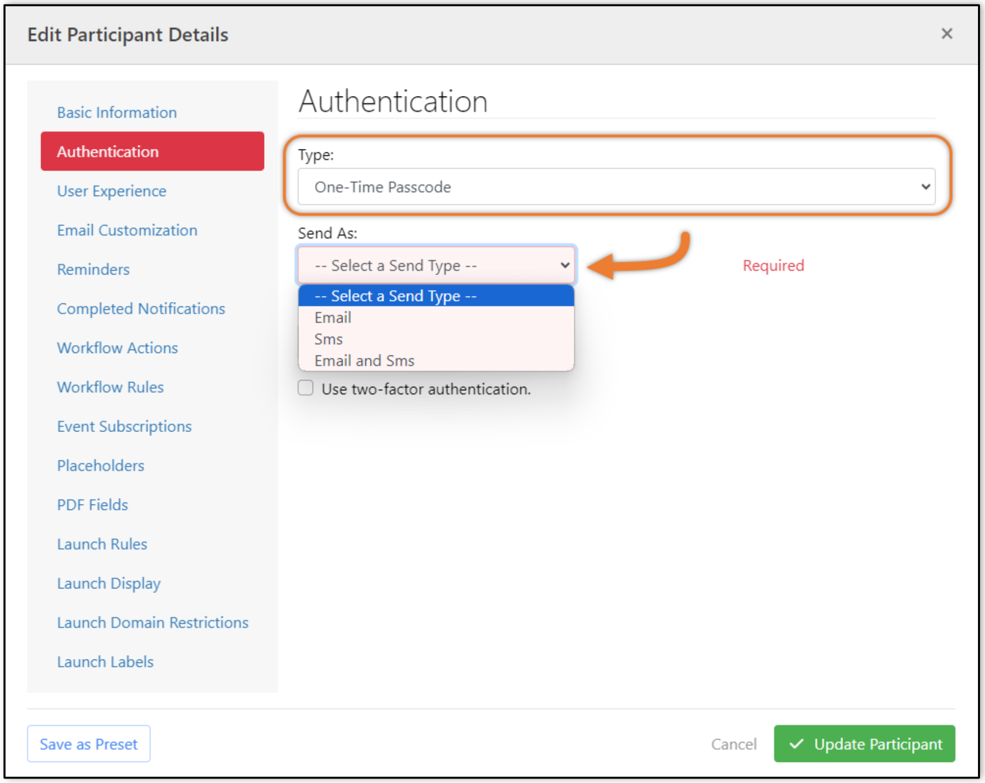
- **[PEP-7065]** ~EventSubscriptions

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.



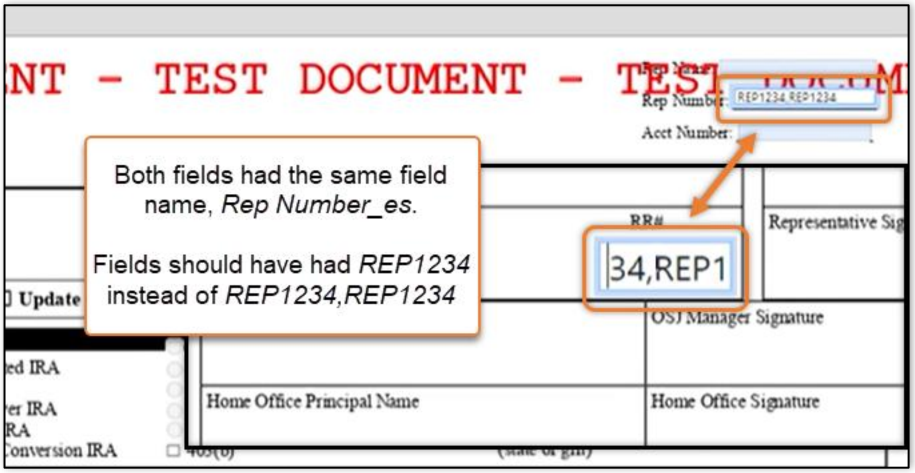
- **[PEP-6972]** ~Authentication ~ControlPanel ~UI/UX ~Workflows

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.



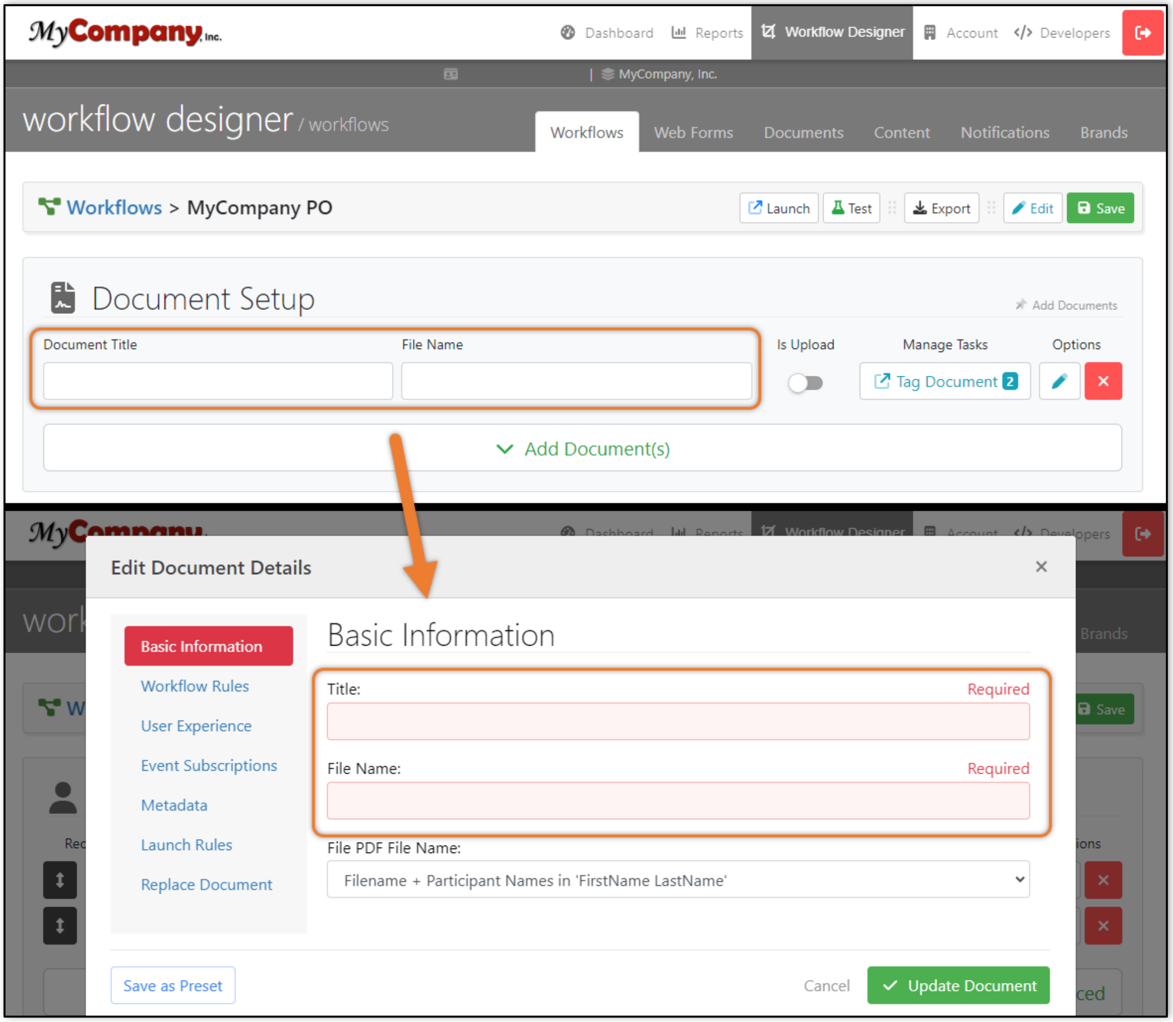
- **[PEP-6524]** ~Forms ~Documents ~Workflows

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*

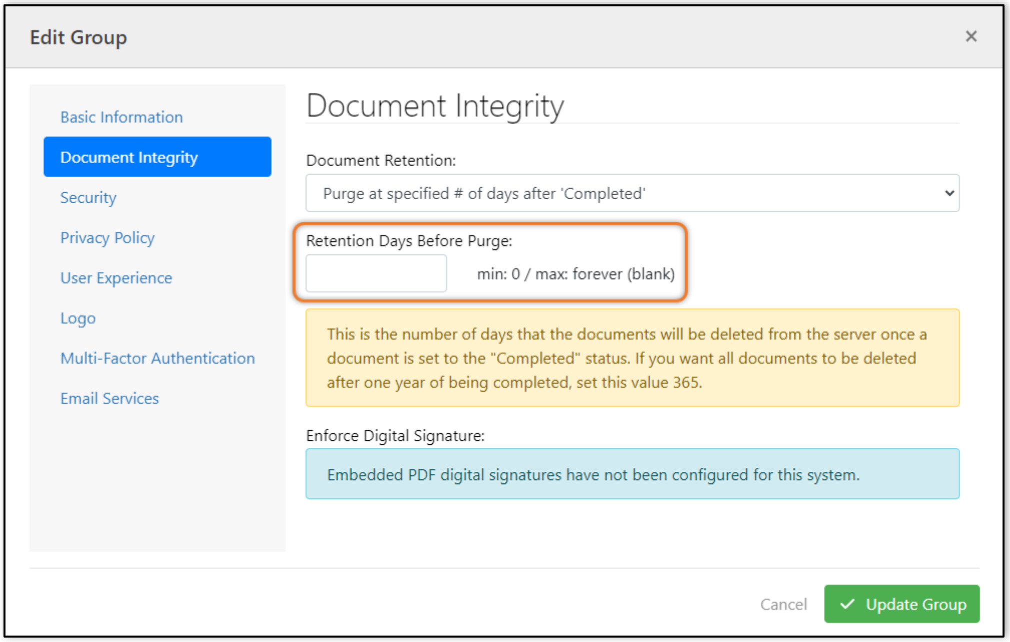
Bug Fixes

- **[PEP-7096]** ~API/WebServices ~Logging

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

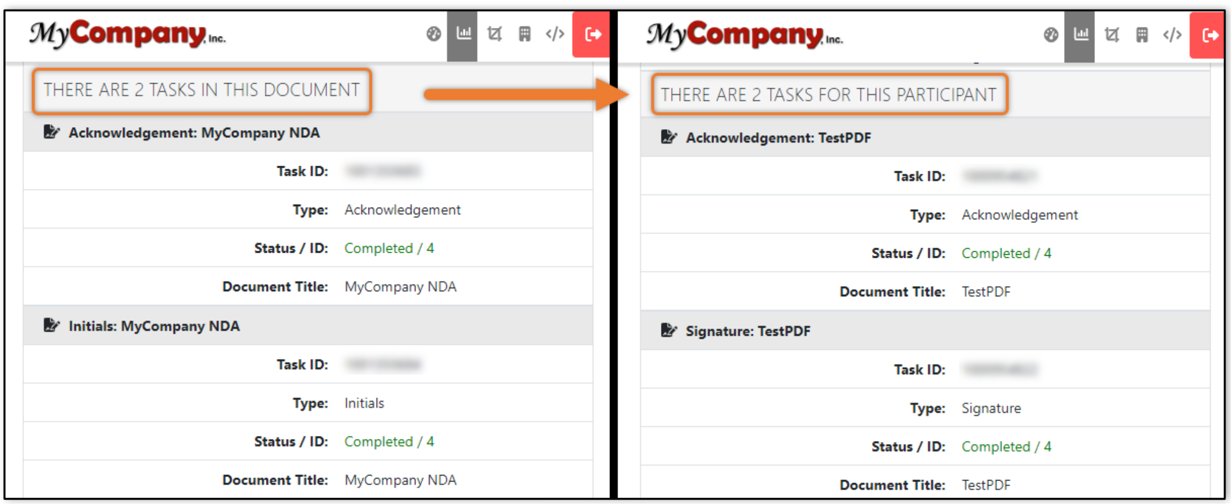
- **[PEP-7084]** ~Groups ~UI/UX

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.



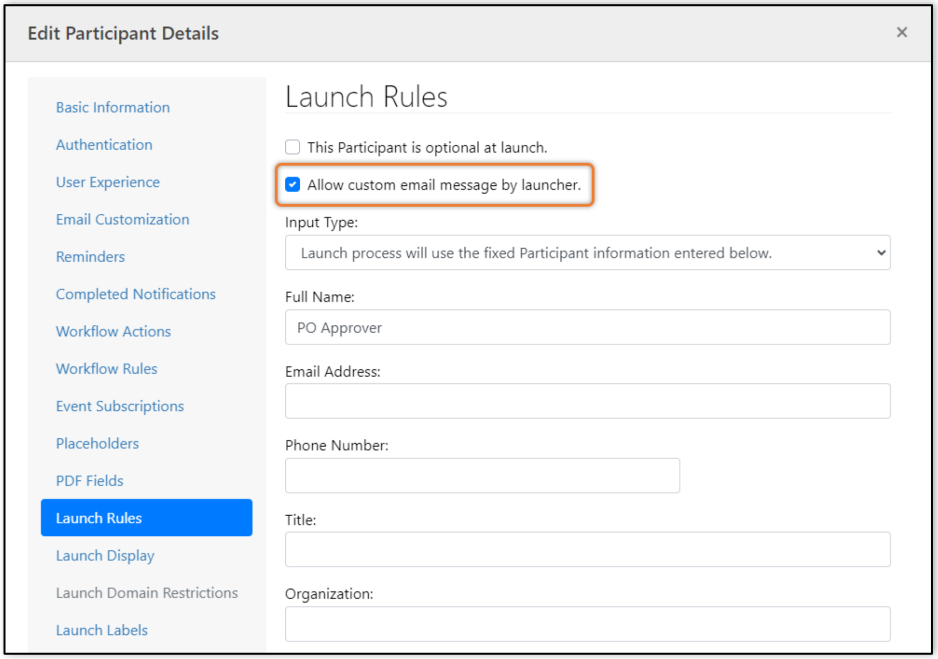
- **[PEP-7067]** ~Reports ~UI/UX

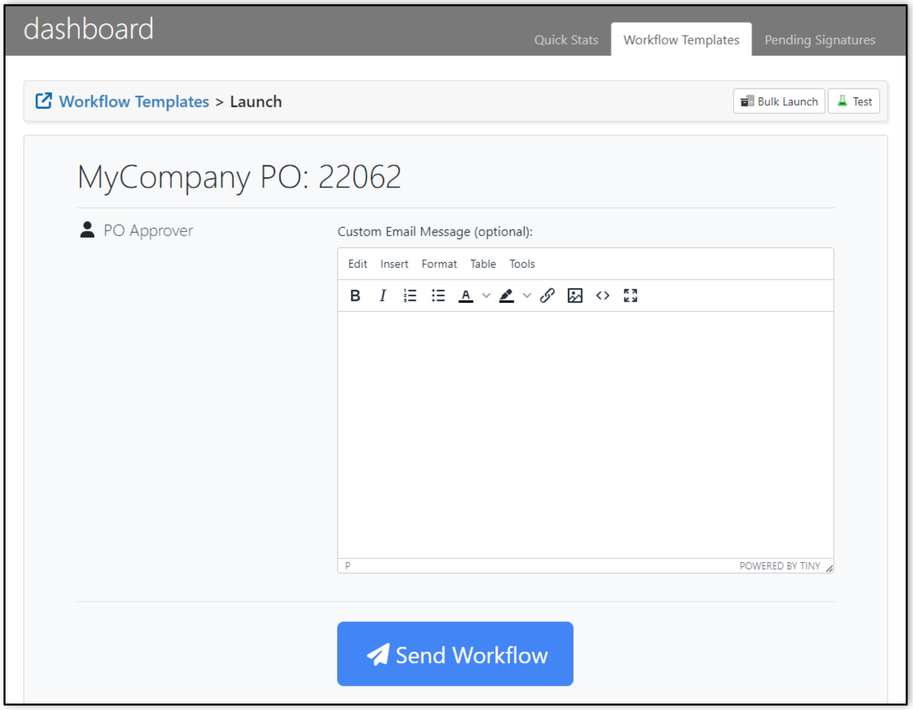
Fixed issue where the label text may cause confusion in the Transaction Details Participants tab. Changed Participants tab text from `in this document` to `for this participant`. Please see the image below for a comparison of the changes.



- **[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.



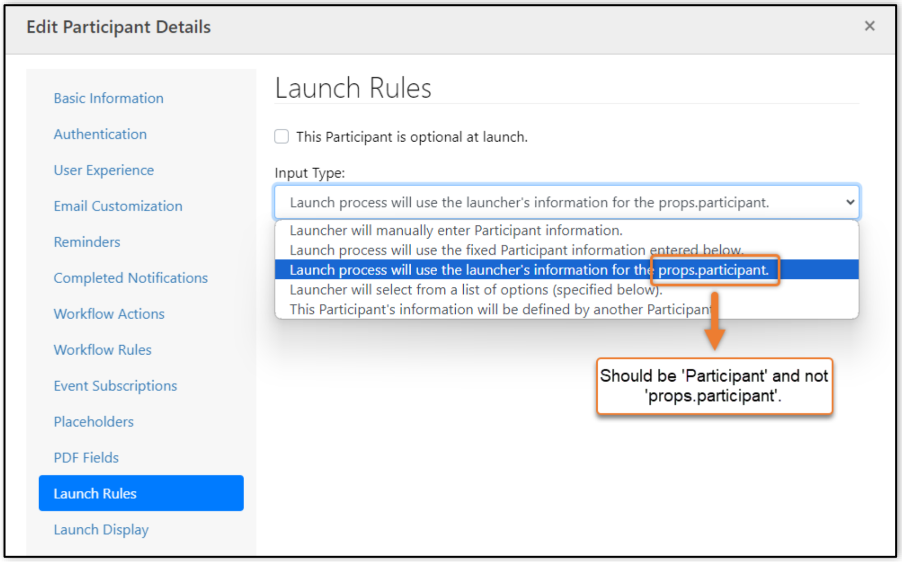


- **[PEP-6949]** ~Authentication ~Security ~Forms

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

- **[PEP-6851]** ~UI/UX ~Workflows

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.



- **[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.