Release Notes

DocuSign October 2018 Release Notes

Published to Production on October 5, 2018

October 2018 Release Notes, covering new features, bug fixes, and coming-soon features and bug fixes.

Release Availability

**Important:** Feature availability timing may vary.

Each month, release notes include items from different parts of the DocuSign product. Some of these areas have different release cycles, which means availability of the feature may vary. Items are available by the end of the month for which the notes are written, but may appear slightly before or after the release notes are published.

**Note:** Some features and options are supported only in certain DocuSign plans. Your account plan might not support some options in these Release Notes. For information about which options are available for your account, check your account plan or contact your Account Manager.

Updates Since Deployment to Demo ................................................................. 3

New and Updated Features .............................................................................. 4

Admin .................................................................................................................. 5

Architecture ......................................................................................................... 6

Sending and Templates ...................................................................................... 7

Signing ................................................................................................................ 14
For updates to the API, see the API Release Notes.
Updates Since Deployment to Demo

We've made the following additions, revisions, and deletions to the Release Notes since the deployment to Demo.

- **Added**
  - **Topics**
    - Allow Account Name Change Only in Admin Account Profile (Coming Soon)
    - Redesigned PowerForms Post-signing Dialog
    - New Option for Envelope Ownership Transfer

- **Revised**
  - **Topics**
    - Change to the User Interface for Add Recipients to Envelope - Moved from Coming Soon to New and Updated Features
New and Updated Features

Following are the new and updated features for the current release.

Admin ........................................................................................................ 5
Architecture ............................................................................................ 6
Sending and Templates ............................................................................. 7
Signing .................................................................................................... 14
Deprecated Features .................................................................................. 15
Admin

Updates to Document Retention Settings

We have made the following changes to the Document Retention settings:

- The Document Retention settings have been moved from Security Settings to their own section labeled *Document Retention*.

- Envelope Purge has been moved to the new Document Retention section in Admin, and is now called *Targeted Purge*.

- Customers can now redact personally identifiable information (PII) during the purging process by selecting the *Redact personally identifiable information* option under Document Retention Policy. This redacts any PII related to the envelope transaction.

New Option for Envelope Ownership Transfer

When transferring envelopes from Admin, you can now opt to include the original owner as carbon copy upon transfer.

This feature is scheduled to be released the second week of October.
Architecture

Update to Envelope Security Improvement: Signing Links Expire Automatically

This feature is now live for all customers in Demo and is scheduled for Production starting in mid-October.

In an effort to improve the security of unauthenticated access to envelopes, this change expires links to envelopes after five clicks or 48 hours from the time they are sent. This only applies to unauthenticated envelopes, this does not apply to envelopes with an access code or other authentication methods.

Initially, this will not be enabled for all accounts, but will be rolled out to accounts over the coming weeks.

Here are some details:

- If you apply any access code or authentication method, the link does not expire
- After a link has expired, the user can request a new link that will be sent to their email account
- For signers with accounts, they can sign in to their DocuSign account to gain access to the envelope regardless of the link expiration status
- Applies to all in-progress links for all recipient types
- Links to completed envelope links expire under the same flow
- This applies to existing links not just new links generated after this change is deployed
Sending and Templates

Select Multiple PowerForms on the Manage Page

We've implemented the ability to select multiple PowerForms on the Manage screen using Ctrl + Shift.

Redesigned PowerForms Post-signing Dialog

We have redesigned the PowerForms post-signing dialog that allows users to download the document that they have completed. Admins can override this functionality and set up a customized PowerForms post-signing redirect URL. Relevant documentation can be found in the How do I specify a URL to redirect to when a PowerForm is completed? article on the DocuSign Support Site.

New eNotary States

We have added Colorado, Oregon, and Utah to our list of support eNotary states.

New Option for Envelope Ownership Transfer

We have added the option to add the original owner as a carbon copy recipient when transferring ownership of envelopes on the Manage page.

The default is disabled. To enable this feature, select the check box Add Original Owner as Carbon Copy below the list of target users.
Customize Language, Subject, and Message in Bulk Send File

Users will now be able to customize the language, subject, and message with the Bulk Send CSV file.

See Bulk Send for Multiple Recipients on the DocuSign support site for how to complete the CSV file.

Include SBS in Bulk Send File

Users will now be able to include a Standards Based Signature with the Bulk Send CSV file.

Instructions for how to complete the CSV file will be available soon on the DocuSign support site.
Change to the User Interface for Add Recipients to Envelope

The label for the More menu under Add Recipients to Envelope is changing to Customize for all users and permissions sets. This is being done to more clearly indicate what actions can be found on the menu.

![Add Recipients to the Envelope
As the sender, you automatically receive a copy of the completed envelope.

- Set signing order

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NEEDS TO SIGN ➜ CUSTOMIZE ➜

Improvements to Mobile Web Navigation

We've made improvements to the Mobile Web navigation by adding more depth to the "hamburger" menu icon.
When users tap the "hamburger", the secondary menu slides out and they can tap any of the following:

- **Home** - to go to the Home Page
- **Manage** - to go to the Manage Page
- **Templates** - To go to the Templates Page
- **My Preferences** - to go to the user’s Preferences Page
- **Notification** - To go to the Notifications Page. A red dot indicates unread notifications
- **Links** that change depending on the user (whether the user is an admin, whether they have multiple accounts open, etc.)
Each of the secondary menus slide out and provide access to a third menu level. For example, when the user taps Manage they can now see and interact with the third-level menu, which was not possible in the previous Mobile Web app. They can access the Envelopes folders (Inbox, Sent, Drafts, and Deleted), as well as the Quick Action folders (Action Required, Waiting for Others, Expiring Soon, and Completed).

Note: The ability to see and create folders will be added in future improvements.
Select and Share Multiple Templates

Multiple Templates can be selected and shared together to one or more users from the account.

This is scheduled to be available starting October 24th

Set up Payments Directly from Envelope or Template Prepare Flow

Admins can now easily set up DocuSign Payments directly from the envelope or template prepare flow. To set up Payments, admins can start the gateway connection process either from the information icon on the Payment Item field (see following image) or the Add New Gateway link on the Payment Item properties panel (see following image). This feature will be made available to Business Pro Monthly/Annual web customers only, releasing on a rolling schedule starting with 10% of customers on September 12th, and reaching 100% of customers by the end of the month.
Signing

Text Fields Optimized for Responsive Signing

Text fields are now updated and optimized for Responsive Signing.

Comments Optimized for Responsive Signing

Comments are now supported and optimized for Responsive Signing.

Notes Optimized for Responsive Signing

Text tags are now updated and optimized for Responsive Signing.
Deprecated Features

Support for DocuSign Print Driver v2 is Ending.

Starting January 2019, Print Driver v2 will no longer function. Customers are encouraged to upgrade to Print Driver v3.x. The latest version (v3.2.08 uploaded September 18, 2018) of Print Driver is now available from the DocuSign support download site.
Bug Fixes

The name-number following the description is the internal DocuSign issue tracking number for the bug.

Sending and Templates ................................................................. 17
Signin ................................................................. 19
Sending and Templates

- We have fixed a bug where a link to templates was missing until the user clicked the refresh button. The link to templates will now appear without the user having to refresh the page (FRM-463).

- An error occurred when trying to correct an envelope with multiple signers, most of them having already completed signing and the remaining signers on the envelope were two signing groups, with Needs to Sign and Receive Copy as roles.

  On the routing order screen, after clicking Next on the top right, users got the error "This recipient type must have a name and email address." and a recipient that had already signed was highlighted.

  We solved the issue by not validating the recipients that have already signed and cannot be changed (MAR-23886).

- The "Data Prepopulation Scope" account plan item was not respected and conditional logic was ignoring the document scope. We fixed this so that when conditional logic is set to be limited to each document, that scope is respected (MAR-26178).

- Fixed an issue where, after correcting a shared envelope, users were returned to their own inbox instead of the shared inbox (MAR-26393).

- Envelopes sent from one site and signed on another site will now appear in a search (MAR-27244).

- During sending, more fields than specified were sent. This issue occurred when signature conditional logic was included on either a check box or a radio button (MAR-27307).

- We were not saving the changes in data labels depending how users navigated away from them. We now save the change in a data label as soon as the user clicks somewhere away from it, whether it's on another field, on another property, on the underlying
document background, or onto another item or menu in the tagging screen (MAR-27332).
Signing

- Radio button selection has an updated look to achieve parity across all form factors (SIGN-17570).

- After the last (required) field is filled, the Next navigation button disappears (SIGN-18643).
Coming Soon

This following features and bug fixes will be available in the near future.

Sending and Templates ................................................................. 21
Bug Fixes .................................................................................. 23
Sending and Templates

Allow Account Name Change Only in Admin Account Profile

Currently, an admin can change the name of the account under My Preferences, as well as in Admin under Account Profile. This can lead to confusion, or to inadvertently changing the account name for all account users when it's changed under My Preferences.

Going forward, changes made under My Preferences will only affect the user-level account settings, and the account name can be changed only in Admin under Account Profile. Edit Account Name will no longer be available from My Preferences.

Redesigned PowerForms Landing Page

We have redesigned the PowerForms landing page to adopt the New DocuSign Experience style. The new PowerForm landing page is also responsive for mobile devices. Currently, it will be available only for new PowerForms—existing PowerForms (those that are live today) will continue to use the current landing page.

Select and Share Multiple Shared Templates

When using shared template folders, users can select templates from the different folders using the CTRL/CMD key and share them to one or more other folders.

This feature will be available starting October 24, 2018.
Responsive Signing on Mobile Devices

Responsive Signing enables recipients to see agreements optimized for viewing on mobile devices, so they can easily read, understand, and ultimately complete agreements on any screen size or orientation. The static agreements are automatically converted to responsive HTML providing a better user experience and leading to higher completion rates. Available starting in October in all current plans.

Smart Sections for Signing

Smart Sections provides advanced control and formatting for Responsive Signing, including: collapsible supplemental sections, pausing and page breaks, and easy-to-view table formats. These controls provide an optimal user experience, while maintaining a compliant signing experience. Available in October as an add-on to Business Pro and Enterprise Pro.

New DocuSign Experience Accessibility

We have been working towards making the application Web Accessibility Compliant Guide (WCAG) 2.0 AA compliant. We expect to be done with this work by the end of the year, and will provide a Voluntary Product Accessibility Template (VPAT) to disclose a detailed explanation about how our sending flow complies with the WCAG guidelines.
Bug Fixes

The name-number is the internal DocuSign issue tracking number for the bug.

- Expirations and Notifications are not being honored when there are multiple envelope recipients (EC-550)

- Radio buttons will soon be available as custom fields. When a user creates a radio button custom field, one radio button will be placed each time the custom field is used (MAR-27310).

- When a recipient is correcting an envelope, if an additional document is added during the correction process and a template is applied to the that document, any AutoPlace fields are not applied, but fields that were placed manually are visible (TT-1464).