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eDOC Signature integration



eDOCSignature Application Programming Interface

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eDOCSignature Application Programming Interface

This document describes the Application Program Interface (API) for the eDOCSignature product. The interface is an adaptation of the Representational State Transfer (REST) type. The API provides access to resources (data entities) via URI paths. To use API resources, client applications will make an HTTPS request and process the response. The request and response data are in JSON format. Some calls require the inclusion of files in the HTTPS request using HTTP file transfer, or may return them in the response using file streaming. Calls without files use MIME format "application/json".

In this implementation of a RESTful interface, a key data field, "action", is used to expand on the standard METHOD types. Since not all systems support all methods in a traditional RESTful interface, the eDOC Innovations implementation uses only the GET and POST methods, although the DELETE action is also supported. The "action" parameter passed in the JSON further defines the action to be taken for the endpoint.

Resources

/DFC

The DFC resource provides tools to create, modify, and delete DocLogic File Container (.DFC) files in the eDOCSignature system.

End Points:

/DFC/

Supported Methods:

GET – Retrieves a document .DFC file (GETDFC action).

POST – Performs various .DFC actions (See Actions list below).

DELETE – Deletes a .DFC (DELETEDFC action).

Actions:

CANCEL, CANCELDFC, CREATEDFC, DELETEDFC, EDITDOC, GETDFC, IMPORT, RESET, UPDATEDFC, SENDEMAIL, GET_REF_DOCS_LIST, CREATEREFDOC, CREATEREQDOC, GETREQUESTEDDOCINFO, UPDATEREFVIEWERS, UPDATEREQUESTEDDOCINFO, UPLOADREQUESTEDDOC.

CANCEL

The CANCEL action sets the status of the current document to "Canceled". It then updates the package status based on current document statuses. If the changes have resulted in the completion of a signing order tier, then notices are sent out to signers in the next tier. This function can also be called using the "CANCELDFC" action.

Variable Name:	Description:
action	CANCEL
session	The 32-character ID of the current authenticated session.
host	IP address of the client machine.
controlid	The institution identifier.
pkgid	32-character reduced GUID. If not included, will be looked up from the Doc ID.
docid	32-character reduced GUID.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/
JSON:
{
  "session": "4CA8415E25674897A1BC4DA6C8E78F2D",
  "controlid": "CUA123",
  "action": "CANCEL",
  "docid": "3F508E0B4C4FB9479562E23E8E37AAB1",
  "pkgid": "40B37AA4083F5EC9562FB947E23E8EB1",
  "host": "127.0.0.1"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	Error message to display to the end user. Only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. Only returned if result is false.

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "DocID 7B556CA0783889AA236558DC5973BB3A not found."  
}
```

CREATEDFC

The CREATEDFC action receives an uploaded .PDF file, signing element, and signer data, then imports them into a .DFC file for use in the eDOCSignature signing process. JSON parameters for the request are listed below. The Control ID and Host parameters are required, along with at least one signer and one signing element. The signing elements and signer data are stored in the attributes of the .DFC, while the document file is stored as the main DOC element in the file. A signing set is created for each signer in the document, and an email is sent to each signer notifying them they have documents to sign. Signing element dependencies allow one signing element (the child) to be activated based on the value of another signing element (the parent).

Variable Name:	Description:
action	Set to CREATEDFC.
session	The 32-hex character ID of the current authenticated session.
controlid	The institution identifier.
host	IP Address of the client machine.
formname	The document form name (type). If coming from ProDOC or going to an eDOC 2020DOC system after completion, this is required and is used to map the returning document to a 2020DOC table.
sendcopy	"1" or "0". If "1", a copy of the completed document is sent to the user that sent the document for signing.
sendcode	If "sendcopy" is set to "1", and "sendcode" is non-blank, the document sent will be password-protected using the "sendcode" value.
sharingids	A JSON array of user or group IDs (in addition to the user who created the document for signing) which will have access to edit this document. Use the GETUSERS and GETGROUPLIST actions on the USERS and GROUPS resources to get the list of user and group IDs in the system.
indexfields	A JSON array of name-value pairs. Used to include additional user-defined index fields in the document metadata.
signertiers	Allows signers to be grouped into tiers of signing. Each signer in a group will need to sign the document before the next tier is sent emails to sign the document.

pkgid	32-alphanumeric GUID. Unique ID for the package. Use the same ID when uploading multiple documents to put them in the same package. If not specified, a new ID will be created.
docid	32-hex character reduced GUID identifying the document. If not specified, a new ID will be created.
pkgname	Package name. 64-characters maximum length. If not specified, one will be automatically created from the document form name and current date.
forcename	Set value to "true" or "false". If "true", the signer is forced to use the "name" value in text signing mode. The signer can select the font but cannot change the text when creating a signature.
files	The file name of the uploaded document, passed as a JSON array with a single element (wrapped in double quotes in square brackets).
signatureboxes	A JSON array of signing element data. (See below for detailed information).

“signatureboxes” Array Variables:

Variable Name:	Description:
xp	The horizontal position of the signing element from the left edge of the page as a percentage of the page width.
yp	The vertical position of the signing element from the top edge of the page as a percentage of page height.
wp	The width of the signing element as a percentage of the page width.
hp	The height of the signing element as a percentage of the page height.
id	Unique GUID for this signing element.
type	0 – Signature 1 – Initial 2 – Date 3 – Text 4 – Checkbox 5 – Radio

	6 – User Field
page	Page number where the signing element appears (zero- based).
font	Font class, defaults to Arial.
fontcolor	Color of font, defaults to black.
fontsize	Size of font.
fieldname	Field name for this signing element. If this type of signing element has a value, it will be returned in FieldName=Value format. The name and value are also used when building field dependencies. Radio boxes are associated with other by assigning the same fieldname to all buttons in the group.
fieldlabel	Label to show to signers (<i>this is not currently implemented</i>).
defaultvalue	If the signing element has a value (such as a text box or radio button), it will use this as the initial value.
required	Set to "1" if the signing element is required. Set to "0" if signing element is not required.
checkedvalue	The value a checkbox or radio button returns when it is checked or selected.
uncheckedvalue	The value a checkbox returns if it is not checked.
depfield	This is the fieldname of the parent signing element. If this property is non-blank, this signing element will be active if the parent signing element meets the condition specified by the depoperator (dependency operator) and depfieldvalue (dependency field value) below.
depopoperator	This is the operator used when checking the value of the parent signing element value. Possible operators include: "=", ">", "<", "<=", ">=", "<>". Defaults to "=".
depfieldvalue	This is the field value required (using the operator) in the parent signing element to activate this (the child) signing element.
value	This is the initial value of a User Field signing element. The user will be able to edit this value in the review process before sending the document for signing.
signer	An array of signer information for this signing element. All signing elements for a signer should have the same signer information. This parameter can be omitted if the signing element is a User Field (type 6). (See below for details on the structure of the signer array)

“signer” Array Variables”

Variable Name:	Description:
signsetid	This is a 32-character reduced GUID. If left blank, it will be assigned automatically. If the signer full name and email match an existing signer for the package, this will be overwritten to match the signing set ID for that signer. This value should be the same for all signing elements for a given signer on the document.
id	This value should be the same for all signing elements for a given signer on the document. It can be the same as the signsetid above.
name	Full name of signer.
email	Email address of signer.
authcode	An authentication code the signer must enter before being allowed to sign.
tier	Signing order for the signer. This is a number, starting at “0”, where signers with the lowest numbers sign first. The signing notifications (tickets) are sent to a tier of signers only after the previous tiers of signers have completed signing. More than one signer can be assigned to the same tier. If you want all signers to sign at the same time, leave this blank for all signers. Defaults to “0”. Tier numbers do not need to be sequential (0,1,5,7 is valid).
verifyrequired	This variable enables out of wallet authentication. Set to “0” if out of wallet authentication is not desired. Set to “1” if you want the signer to go through out of wallet authentication using IDology. This authentication occurs at the beginning of the signing process. NOTE: Your institution must be configured to use this.
notificationtype	A string representing the notification type to send to this signer. There are three valid types: “Public” = Send email message to signer. “Private” = Send abbreviated email to signer and send message to home banking system via the home banking API. “No Email” = No message will be sent. If the notification type is left blank or not included it will default to “Public”.
notificationaccount	When notificationtype is set to “Private”, this account number is required to identify the customer account in the home

banking request. If not specified, a "Public" notification will be sent instead of a "Private" notification.
--

Sample Request:

METHOD: POST

URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/

JSON:

```
{
  "session": "C7EC41A7187F4405AB1B5C73487E78EA",
  "controlid": "CUA123",
  "formname": "New Member Application",
  "sendcode": "",
  "sendcopy": "0",
  "pkgname": "New Member Application 09\20\2017",
  "pkgid": "12B183BFD9044820AF6170E89892B36F",
  "signatureboxes": [{
    "xp": 20.915032679739,
    "yp": 94.065656565657,
    "wp": 30.228758169935,
    "hp": 2.1464646464646,
    "id": "1505911691606",
    "type": 0,
    "page": 0,
    "font": "Arial",
    "fontsize": 10,
    "fontcolor": "black",
    "fieldname": "",
    "fieldlabel": "",
    "defaultvalue": "",
    "required": "1",
    "checkedvalue": "",
    "uncheckedvalue": "",
    "signer": {
      "id": "B7BCB0A5F3E83AE28F60A89406419061",
      "signsetid": "B7BCB0A5F3E83AE28F60A89406419061",
      "name": "John Smith",
      "email": "jsmith@edoclogic.com",
      "authcode": "1234",
      "selected": true,
      "tier": "0",
      "verifyrequired": "1"
    }
  }],
}
```

```

    "depfield": "",
    "depfieldvalue": "",
    "depopoperator": ""
  }, {
    "xp": 65.359477124183,
    "yp": 94.065656565657,
    "wp": 15.114379084967,
    "hp": 1.2626262626263,
    "id": "1505911698173",
    "type": 2,
    "page": 0,
    "docnum": 0,
    "font": "Arial",
    "fontsize": 20,
    "fontcolor": "black",
    "fieldname": "",
    "fieldlabel": "",
    "defaultvalue": "",
    "required": "1",
    "checkedvalue": "",
    "uncheckedvalue": "",
    "signer": {
      "id": "B7BCB0A5F3E83AE28F60A89406419061",
      "signsetid": "B7BCB0A5F3E83AE28F60A89406419061",
      "name": "John Smith",
      "email": "jsmith@edoclogic.com",
      "authcode": "1234",
      "selected": true,
      "tier": "0",
      "verifyrequired": "1"
    },
    "depfield": "",
    "depfieldvalue": "",
    "depopoperator": ""
  }],
  "sharingids": ["E4118F9F3D15497D815C5C7B53C06BF7",
"4D339E795FB3497C97B41F12127A1127"],
  "indexfields": [{
    "name": "Last_Name",
    "value": "Smith"
  }, {
    "name": "First_Name",
    "value": "John"
  }, {

```

```

    "name": "Account",
    "value": "123456"
  },
  "signertiers": [{
    "id": "B7BCB0A5F3E83AE28F60A89406419061",
    "tier": "0"
  }],
  "forcename": false,
  "files": ["59c2630bbfa42.pdf"],
  "host": "172.23.1.98"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
docid	A 32-hex character reduced GUID identifying the document created.
pkgid	A 32-hex character reduced GUID identifying the package that the document is associated with.
signsets	A JSON array of name-value elements, one row for each signer on the document. Each row contains the following named elements: <ul style="list-style-type: none"> "id" - The 32-hex character reduced GUID identifying the signer. "name" - The full name of the signer. "email" - The email address for the signer.

- Sample successful response JSON:

```

{
  "result": true,

```

```

    "docid": "3093A18CA6E04130BC26ACA0E894E01F",
    "pkgid": "12B183BFD9044820AF6170E89892B36F",
    "signsets": [{
      "id": "B7BCB0A5F3E83AE28F60A89406419061",
      "name": "John Smith",
      "signername": "John Smith",
      "signeremail": "jsmith@edoclogic.com"
    }]
  }

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid file type"
}

```

CREATEREFDOC

The CREATEREFDOC action creates reference documents for signers to view during the signing process. The action receives an uploaded document file along with signer data for those signers designated to be able to view the document, and imports them into a .DFC file for use in the eDOCSignature signing process. JSON parameters for the request are listed below. The Control ID and Host parameters are required, along with the signer's information. The signer data are stored in the attributes of the .DFC file while the document file is stored as the main DOC element in the file. A sign set is created for each signer that can view the document.

Variable Name:	Description:
action	Set to CREATEREFDOC.
session	The 32-character ID of the current authenticated session.
controlid	The institution identifier.
host	IP address of the client machine.
formname	The form name, 128-character maximum. If coming from ProDOC or going to an eDOC 2020DOC system after completion, this is required.
pkgid	The 32-character reduced GUID of the package the reference

	document is to be associated with. Use the same package ID when uploading multiple documents to put them in the same package.
pkgname	Descriptive name of the package, 64-character maximum.
files	Array of file names sent in the POST request. Currently only supports one document at a time.
signers	An array of signer information for the signers allowed to view this document. See below for details.

“signers” Array Variables:

Variable Name:	Description:
signsetid	The 32-hex character reduced GUID identifying the sign set for the signer that the document will be viewed by.
id	The 32-hex character reduced GUID identifying the sign set for the signer that the document will be viewed by. This should be the same value as “signsetid”.
name	Full name of signer.
email	Email address of signer.
authcode	An authentication code the signer must enter before being allowed to sign.
tier	Signing order tier for this signer. The tier determines which order signer(s) receive notification to sign their document. This is a number, starting at “0”, where signers with the lowest numbers sign first. The signing notifications (tickets) are sent to a tier of signers only after the previous tiers of signers have completed signing. More than one signer can be assigned to the same tier. If you want all signers to sign at the same time, leave this blank for all signers. Defaults to “0”. Tier numbers do not need to be sequential (0,1,5,7 is valid).
verifyrequired	This variable enables out of wallet authentication. Set to “0” if out of wallet authentication is not desired. Set to “1” if you want the signer to go through out of wallet authentication using IDology. This authentication occurs at the beginning of

	the signing process. NOTE: Your institution must be configured to use this.
notificationtype	A string representing the notification type to send to this signer. There are three valid types: "Public" = Send email message to signer. "Private" = Send abbreviated email to signer and send message to home banking system via the home banking API. "No Email" = No message will be sent. If the notification type is left blank or not included it will default to "Public".
notificationaccount	When notificationtype is set to "Private", this account number is required to identify the customer account in the home banking request. If not specified, a "Public" notification will be sent instead of a "Private" notification.

Sample Request:

METHOD: POST

URI: <https://eDSserver/ISAPI/RIP.dll/REST/DFC/>

JSON:

```
{
  "session": "CA848AC2E7104AA2B6E865CAF3DE44A1",
  "controlid": "CUA123",
  "formname": "Information on Your new Loan",
  "pkgname": "Loan App 10\04\2017",
  "pkgid": "C346B47DAB6368B79B02196711AFB4FA",
  "signers": [{
    "id": "Signer1",
    "signsetid": "6BC393F4B9F8EDB68DFB0215D89D9168",
    "name": "Roger Risk",
    "email": "rr@cua123.org",
    "authcode": "",
    "tier": "0",
    "verifyrequired": "0"
  }],
  "files": ["59d4d592f139e.pdf"],
  "action": "CREATEREFDOC",
  "host": "172.23.1.98"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid file type"  
}
```

CREATEREQDOC

The CREATEREQDOC action creates a request to have a signer upload a document. The action receives data on the signer that will be requested to upload the document along with the form name of the document and the message that will be displayed to the signer when the request is made. JSON parameters for the request are listed below. The Control ID and Host parameters are required, along with the signer information, form name, and message. A sign set and package will be created if they do not exist.

Variable Name:	Description:
action	Set to CREATEREQDOC.
session	The 32-character ID of the current authenticated session.
controlid	The institution identifier.
host	IP Address of the client machine.
formname	The form name for the document to be uploaded. If coming from ProDOC or going to an eDOC 2020DOC system after completion, this is required.
formmessage	The message to display to the signer when requesting the document.
pkgid	32-character reduced GUID for the package which the document is to be associated with. If none is specified, a new package will be created for this document. Use the same ID when adding multiple documents to the same package.
pkgname	Descriptive name of package, 64-character max.
signers	An array of information for the signer who will be requested to upload the document. (See below for details)

“signers” Array Variables

Variable Name:	Description:
signsetid	This is a 32-character reduced GUID. If left blank, it will be assigned automatically. If the signer full name and email match an existing signer for the package, this will be

	overwritten to match the sign set ID for that signer. This value should be the same for all signing elements for a given signer on the document.
id	This value should be the same for all signing elements for a given signer on the document. It can be the same as the signsetid above.
name	Full name of signer.
email	Email address of signer.
authcode	An authentication code the signer must enter before being allowed to sign.
tier	Signing order tier for this signer. The tier determines which order signer(s) receive notification to sign their document. This is a number, starting at "0", where signers with the lowest numbers sign first. The signing notifications (tickets) are sent to a tier of signers only after the previous tiers of signers have completed signing. More than one signer can be assigned to the same tier. If you want all signers to sign at the same time, leave this blank for all signers. Defaults to "0". Tier numbers do not need to be sequential (0,1,5,7 is valid).
verifyrequired	This variable enables out of wallet authentication. Set to "0" if out of wallet authentication is not desired. Set to "1" if you want the signer to go through out of wallet authentication using IDology. This authentication occurs at the beginning of the signing process. NOTE: Your institution must be configured to use this.
notificationtype	A string representing the notification type to send to this signer. There are three valid types: "Public" = Send email message to signer. "Private" = Send abbreviated email to signer and send message to home banking system via the home banking API. "No Email" = No message will be sent. If the notification type is left blank or not included it will default to "Public".
notificationaccount	When notificationtype is set to "Private", this account number is required to identify the customer account in the home banking request. If not specified, a "Public" notification will be sent instead of a "Private" notification.

Sample Request:

METHOD: POST

URI: <https://eDSserver/ISAPI/RIP.dll/REST/DFC/>

JSON:

```
{
  "session": "6D4D7E868DE64420A39370AF94114445",
  "controlid": "CUA123",
  "formname": "PhotoID",
  "pkgname": "Claim2 10\04\2017",
  "pkgid": "5A4BA036D23F012496102651DB48816E",
  "signers": [{
    "id": "2A04BB371E18CC518B86CC697B0B8FAB",
    "signsetid": "2A04BB371E18CC518B86CC697B0B8FAB",
    "color": "#ff0000",
    "name": "Roger Risk",
    "email": "rr@cua123.org",
    "authcode": "",
    "verifyrequired": "0",
    "tier": "0"
  }],
  "formmessage": "Please upload a copy of your photo ID.",
  "action": "CREATEREQDOC",
  "host": "172.23.1.98"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
docid	Unique ID of requested document.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true, "docid":"2304BB371E18CC518B86CC697B2348F42"}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Session expired"  
}
```

DELETEDFC

The DELETEDFC action deletes the .DFC file and all SQL table entries pertaining to that document.

Variable Name:	Description:
action	Set to DELETEDFC.
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	32-character reduced GUID identifying the document.

Sample Request:

METHOD: POST (With "action":"DELETE") or DELETE (no action).

URI: <https://eDSserver/ISAPI/RIP.dll/REST/DFC/>

JSON:

```
{  
  "session": "77C384B219034D9CB42796C9EF66969D",  
  "controlid": "CUA123",  
  "action": "DELETE",  
  "pkgid": "12B183BFD9044820AF6170E89892B36F",  
  "docid": "3093A18CA6E04130BC26ACA0E894E01F",  
  "host": "169.254.213.39"  
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if

	result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

GETDFC

The GETDFC action retrieves the .DFC for the requested document and returns it via http(s) download. This action can also be called using the "GET" method with no action specified. If successful, the .DFC file is streamed back via http(s) download. You can also specify an output type of ".PDF" to download the most recent .PDF file of the document instead of the entire .DFC. If PDF_AUD is specified as the output type, or if the includeauditdata parameter is set, the signing audit information page(s) will be appended to the end of the document. This can also be done using the institution-level "IncludeAuditData" setting in the RAP RDI.ini file.

Variable Name:	Description:
action	GETDFC
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	32 hex character reduced GUID.
outputtype	This is an optional parameter. Set to "PDF" to return .PDF of document instead of .DFC. Setting this to "PDF_AUD" will append the signing audit data to the end of the .PDF document.
includeaudit	"1" or "0". If outputtype is set to "PDF", this can be set to "1" to append the signing audit information page(s) to the end of the .PDF file. Ignored if outputtype is set to "PDF_AUD".

Sample Request:

```
METHOD: GET or POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/
JSON:
{
  "action": "GETDFC",
  "session": "64B7806B0E2A4F20B6D23BAAE7ACABC5",
  "controlid": "CUA123",
  "host": "169.254.213.39",
  "outputtype": "PDF",
  "includeaudit": "1",
```

```
"docid": "76ED14CAA8D143DA89433DF0497AFBAF"
}
```

Response Parameters:

If the request is successful, then a multipart response will be sent. One part will be the stream of the .DFC or .PDF file, and the other part will be JSON.

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
file	The file name of the document being streamed back.

- Sample successful response JSON:

```
{
  "result":true,
  "file":"A0F7CADD23AF425D903B61FBAD5AC6BD.DFC"
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "File Not Found"
}
```

GETREQUESTEDDOCINFO

The GETREQUESTEDDOCINFO action retrieves the filename and message of a specific requested document.

Variable Name:	Description:
action	GETREQUESTEDDOCINFO
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	32-character reduced GUID of requested document.

Sample Request:

```

METHOD: GET or POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/
JSON:
{
  "session": "B4DD77AEC566499EBE4275BAAA5B296B",
  "controlid": "CUA123",
  "action": "GETREQUESTEDDOCINFO",
  "docid": "B3E39A684BEA479884A3B69E9E3D081A",
  "host": "172.23.1.92"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
form pkgid	Form name of the requested document. ID of the package.
pkgname	Name of the package.

createdon	Date the package was created.
message	Message text to display to the signer when requesting the document.
signsets	Array of signer information. This will only contain one record in this call since only one signer can be assigned a requested document.

- Sample successful response JSON:

```
{
  "result": true,
  "status": "Requested",
  "form": "DriversLicense",
  "pkgid": "0BD3AF398954D9BE8414C5805C078E08",
  "pkgname": "CUA0401 02/05/2018",
  "createdon": "2018-02-05 11:52:59",
  "message": "Please upload a copy of your driver's license",
  "signsets": [{
    "signsetid": "E4F4ABA5BF1ACF70AD0B34002C99A51D",
    "pkgid": "0BD3AF398954D9BE8414C5805C078E08",
    "signsetname": "Sally Smith",
    "status": "Rdy_Sign",
    "signerid": "0",
    "name": "Sally Smith",
    "email": "ssmith@mycu.com",...
  }]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "File Not Found"
}
```

IMPORT

The IMPORT action receives an uploaded .DFC file and imports it into the eDOCSignature system. The .DFC must be in eDOCSignature format, which includes signing element position and size expressed as a percent of page height and width. The signing element and signer data are stored in the attributes of the .DFC. Each signing element has a section named "SigBox_0", "SigBox_1", etc. (99 max). Each signer has a section named "SignSet_XXXX" where XXXX is the 32-character reduced GUID for the sign set. The attributes for the document are described below:

Section	Attribute Name:	Description:
DOCUMENT	CONTROL_ID	Institution Identifier, 8 characters max.
DOCUMENT	CREATED_BY	The username of the user who created the file. Must be unique within the eDOCSignature system.
DOCUMENT	CREATED_ON	Creation date/time in format MM/DD/YYYY HH:MM:SS.
DOCUMENT	DOC_ID	32-character reduced GUID identifying the document.
DOCUMENT	EDOCSIGNATURE	Set to "true" to identify the document as being in eDOCSignature format. The import will fail if this flag is not set.
DOCUMENT	FORM	The form name of the document.
DOCUMENT	PAGE_COUNT	The number of pages in the document image.
DOCUMENT	PKGID	The 32-character reduced GUID identifying the package the document should be associated with.
DOCUMENT	PKG_NAME	The name of the package the document should be associated with.
DOCUMENT	TABLE_ID	Name of the target table the document will be inserted into if returned to the 2020DOC system. Defaults to "InBox".
SigBox_n	CheckedValue	The value given the field if the checkbox or radio button is checked. Radio button values must be unique within the group. (Hex encoded)
SigBox_n	DepField	The name of the parent field if dependency is used. If this is blank or not included, the signing element will always be active.

SigBox_n	DepOperator	The operator used to compare the DepField to the DepField Value. Defaults to "=". Other values may include "<", ">", "<>", ">=", "<=". (Hex encoded)
SigBox_n	DepFieldValue	The value the DepField must have for the signing element to be active. For checkboxes and radio buttons, this is "Checked" or "Unchecked". (Hex encoded)
SigBox_n	FieldDefaultValue	The initial value of a field if no other value is specified. This is included in the index data of the .RBK record.
SigBox_n	FieldLabel	The display name of text, checkbox, or radio button fields in the signing element.
SigBox_n	FieldName	The name of the field. The value will be included with in the index data of the completed document.
SigBox_n	FontFamily	The font family for text signing elements.
SigBox_n	FontSize	The font size (point) for text signing elements.
SigBox_n	Height	The height of the signing element, expressed as a percentage of page height. Floating point, double-precision.
SigBox_n	Page	The number of the page (0-based) that the signing element appears on.
SigBox_n	Required	If set to "1", the signing element must be clicked or filled for the signing to be completed.
SigBox_n	SigType	0=Signature, 1=Initials, 2=Signer Text Input, 3=Date, 4=CheckBox, 5=Radio Button, 6=User Text input.
SigBox_n	SignSetID	The 32-character reduced GUID identifying the sign set.
SigBox_n	Text	The final value of signing elements that have text.
SigBox_n	UnCheckedValue	The value of a checkbox that is not checked.
SigBox_n	Width	The width of the signing element expressed as a percentage of the page width. Floating point, double-precision.
SigBox_n	X	The horizontal position (from the left edge of the page) expressed as a percentage of the page width. Floating point, double-precision.

SigBox_n	Y	The vertical position (from the top edge of the page) expressed as a percentage of the page height. Floating point, double-precision.
SignSet_XXXX	CreatedBy	The username of the user who created the signset. Must be unique within the eDOCSignature system.
SignSet_XXXX	CreatedOn	The Date/Time the sign set was created in format: MM/DD/YYYY HH:MM:SS.
SignSet_XXXX	CryptID	The Crypt ID used to encrypt the signer ticket link.
SignSet_XXXX	NotificationAccount	The signer's home banking account (required if private notification type is used).
SignSet_XXXX	PackageID	The 32-character reduced GUID of the package the document should be associated with.
SignSet_XXXX	SignSetID	The 32-character reduced GUID identifying the signset.
SignSet_XXXX	SignSetName	Descriptive name of signset, typically set to the signer's full name.
SignSet_XXXX	SignerAuthCode	Authentication code the signer is required to enter before accessing documents for viewing or signing.
SignSet_XXXX	SignerEmail	Email address for the signer.
SignSet_XXXX	SignerID	Signer ID is used to identify a signer within a package. It may be just a sequential number ("1", "2", "3", etc.), "Signer" plus a number ("Signer1", "Signer2", etc.), or a two-part number ("12345-1", "23456-2", etc.). The number at the end (or after the dash) is referred to as the "signer number" which identifies the role of the signer and must be consistent across all documents in the package. This is used to combine documents into existing sign sets (see discussion on signer number below). In the two-part number, the first part of the number (before the dash) is used to tie the signer to a document, which is used when returning the signing status of the signer for that document.
SignSet_XXXX	SignerName	The full name of the signer. If "Force Name" is used, the signer is required to use this name

		with the type font option for their signature.
SignSet_XXXX	SignerNotification	The type of notification used for this signer. "Public" =regular email messages, "Private" = abbreviated emails directing signer to home banking site, combined with messages in the home banking system (requires integration with the institution's home banking API). "No Email" =no notifications sent. Defaults to "Public".
SignSet_XXXX	Signer_Role	Set to the role/signer number (See signer number discussion below).
SignSet_XXXX	VerifyRequired	This variable enables out of wallet authentication. Set to "0" if out of wallet authentication is not desired. Set to "1" if you want the signer to go through out of wallet authentication using IDology. This authentication occurs at the beginning of the signing process. NOTE: Your institution must be configured to use this.

Based on the data in the .DFC file, the document will be added to an existing signset and package if found. If this happens, the SignSet ID in the document will be replaced with the SignSet ID of the existing signset in the package. The criteria for this is that the package ID in the new document must match an existing package ID, and the signer number must match. The signer number is derived from the Signer ID or Role ID, which may be in various formats. The following examples show the signer number for the various Signer ID formats:

Role/Signer ID:	Signer Number:
56789-1	1
Signer2	2
3	3

The role/signer number must be consistent across all documents in the package. For example, the applicant might be role/signer number "1" and the co-applicant "2", etc. All documents in the package should then use "1" as the role/signer number for the applicant signsets in all the documents in that package. They will be combined into a single signset for the applicant as they are imported in the eDOCSignature server.

If successfully imported, email notifications will be sent to the appropriate tier of signers based on package status. If the "Created By" user does not exist in the eDOCSignature system, a new user will be created and added to the eDOCSig_XXXXX group where XXXXX is the control ID. The variables in the post request are shown below:

Variable Name:	Description:
action	IMPORT
session	The 32-character ID of the current authenticated session. Not required if using the handoff parameter below.
host	IP Address of the client machine.
handoff	If not working within an active session, a secure handoff string can be used to establish a temporary connection and execute this one request. (See Appendix A for handoff string details)
controlid	The institution identifier.
files	A list of files to be uploaded, comma separated, in double quotes. The list is enclosed in square brackets. Currently, only one file at a time is supported.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/
JSON:
{
  "handoff":
  "XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX",
  "host": "172.23.0.63",
  "controlid": "CUA123",
  "action": "IMPORT",
  "files": ["EC42635DAFC0452AB5D5C7FF0C0E96F4.dfc"]
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
signsets	An array of records, one for each signsets created, containing: <ul style="list-style-type: none"> • Doc ID (docid) • sign set signer ID (esignrecipientid) • document signer id (envrecipientid). These IDs can be used to request the status of the signer for each document or for the entire sign set.

- Sample successful response JSON:

```
{
  "result": true,
  "signsets": [{
    "docid": "EC42635DAFC0452AB5D5C7FF0C0E96F4",
    "esignrecipientid": "504B31CFA0E94BD9AFFBB70E907BC747",
    "envrecipientid": "42635-1"
  }]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

RESET

The RESET action resets the .DFC file and all SQL table entries pertaining to that file back to their original state before signing.

Variable Name:	Description:
action	Set to "RESET".
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	32-hex character reduced GUID identifying the document.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/
JSON:
{
    "action": "RESET",
    "session": "64B7806B0E2A4F20B6D23BAAE7ACABC5",
    "controlid": "CUA123",
    "host": "172.23.189.24",
    "docid": "76ED14CAA8D143DA89433DF0497AFBAF"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only

returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Doc ID 76ED14CAA8D143DA89433DF0497AFBAF not found."  
}
```

EDITDOC

The EDITDOC action extracts the document image, signset, and signing element data from the .DFC file and returns it, usually in preparation for editing. The document image (.PDF file) is returned via http(s) download.

Variable Name:	Description:
action	EDITDOC
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine
controlid	The institution identifier.
docid	32-character reduced GUID identifying the document.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/
JSON:
{
  "action": "EDITDOC",
  "session": "64B7806B0E2A4F20B6D23BAAE7ACABC5",
  "controlid": "CUA123",
  "docid": "76ED14CAA8D143DA89433DF0497AFBAF",
  "host": "172.23.189.24"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for

	internal use or API troubleshooting. This variable is only returned if result is "false".
graphic	The file name of the document .PDF file.
form	The form name of the document.
pkgid	32-character reduced GUID of the package the document is associated with.
pkgname	The name of the package the document is associated with.
createdby	The username of the user who created the document.
createdon	The date/time the document was created in format MM/DD/YYYY HH:MM:SS.
sigboxes	<p>A JSON array of signing element data in named element format. Each row of the array includes the following elements:</p> <ul style="list-style-type: none"> • left (floating point, percent of page width). • top (floating point, percent of page height). • width (floating point, percent of page width). • height (floating point, percent of page height) . • esigntype (0=signature, 1=initials, 2=date, 3=signer text, 4=check box, 5=radio button, 6=user text). • boxid (0-based). • pagenumber (0-based). • font • fontsize • fontcolor • signsetid • fieldname • fieldlabel • fielddefaultvalue • fieldrequired • checkedvalue • uncheckedvalue
signsets	<p>A JSON array of sign set data in named element format. Each row in the array includes the following elements:</p> <ul style="list-style-type: none"> • signsetid • pkgid • signsetname • status • signerid • name • email

	<ul style="list-style-type: none"> • role • authcode • cryptid (the crypt ID used to create the .DFC) • createdby (the user who created the .DFC) • createdon (The date/time the .DFC was created in format mm/dd/yyyy hh:mm:ss) • notificationtype • notificationaccount
--	--

- Sample successful response JSON:

```

{
  "result": true,
  "graphic":
"A0F7CADD23AF425D903B61FBAD5AC6BDA0F7CADD23AF425D903B61FBAD5AC6
BD.pdf",
  "form": "My Form",
  "pkgid": "76ED14CAA8D143DA89433DF0497AFBAF",
  "pkgname": "My Form 03292016",
  "createdby": "MR_USER@CUA123",
  "createdon": "03/29/2016 12:31:33",
  "sigboxes": [{
    "left": "13.0718955993652",
    "top": "12.1212120056152",
    "width": "44.9346389770508",
    "height": "4.41919183731079",
    "esigntype": "0",
    "boxid": "0",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "10",
    "fontcolor": "",
    "signsetid": "E887BF9CD7A444BCBF6182589CE944A5",
    "fieldname": "",
    "fieldlabel": "",
    "fielddefaultvalue": "",
    "fieldrequired": "1",
    "checkedvalue": "",
    "uncheckedvalue": ""
  },
  {
    "left": "13.5620918273926",
    "top": "18.9393939971924",
    "width": "16.3398685455322",
    "height": "4.41919183731079",

```

```

    "esigntype": "1",
    "boxid": "1",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "10",
    "fontcolor": "",
    "signsetid": "E887BF9CD7A444BCBF6182589CE944A5",
    "fieldname": "",
    "fieldlabel": "",
    "fielddefaultvalue": "",
    "fieldrequired": "1",
    "checkedvalue": "",
    "uncheckedvalue": ""
  },
  {
    "left": "39.5424842834473",
    "top": "19.9494953155518",
    "width": "16.3398685455322",
    "height": "2.5252525806427",
    "esigntype": "2",
    "boxid": "2",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "18",
    "fontcolor": "",
    "signsetid": "E887BF9CD7A444BCBF6182589CE944A5",
    "fieldname": "",
    "fieldlabel": "",
    "fielddefaultvalue": "",
    "fieldrequired": "1",
    "checkedvalue": "",
    "uncheckedvalue": ""
  },
  {
    "left": "14.3790845870972",
    "top": "26.0101013183594",
    "width": "43.9542465209961",
    "height": "4.41919183731079",
    "esigntype": "3",
    "boxid": "3",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "10",
    "fontcolor": "",
    "signsetid": "E887BF9CD7A444BCBF6182589CE944A5",
    "fieldname": "FullName",

```

```

    "fieldlabel": "Full Name",
    "fielddefaultvalue": "",
    "fieldrequired": "0",
    "checkedvalue": "",
    "uncheckedvalue": ""
  },
  {
    "left": "14.3790845870972",
    "top": "32.4494934082031",
    "width": "3.59477114677429",
    "height": "2.5252525806427",
    "esigntype": "4",
    "boxid": "4",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "10",
    "fontcolor": "",
    "signsetid": "E887BF9CD7A444BCBF6182589CE944A5",
    "fieldname": "CheckBox1",
    "fieldlabel": "0",
    "fielddefaultvalue": "0",
    "fieldrequired": "0",
    "checkedvalue": "True",
    "uncheckedvalue": "False"
  },
  {
    "left": "14.5424833297729",
    "top": "36.8686866760254",
    "width": "2.94117641448975",
    "height": "2.14646458625793",
    "esigntype": "5",
    "boxid": "5",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "10",
    "fontcolor": "",
    "signsetid": "E887BF9CD7A444BCBF6182589CE944A5",
    "fieldname": "RadioBtn1",
    "fieldlabel": "0",
    "fielddefaultvalue": "0",
    "fieldrequired": "0",
    "checkedvalue": "Yes",
    "uncheckedvalue": ""
  },
  {
    "left": "20.7516345977783",

```

```

    "top": "36.9949493408203",
    "width": "2.94117641448975",
    "height": "2.14646458625793",
    "esigntype": "5",
    "boxid": "6",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "10",
    "fontcolor": "",
    "signsetid": "E887BF9CD7A444BCBF6182589CE944A5",
    "fieldname": "RadioBtn1",
    "fieldlabel": "0",
    "fielddefaultvalue": "0",
    "fieldrequired": "0",
    "checkedvalue": "No",
    "uncheckedvalue": ""
  }
],
"signsets": [{
  "signsetid": "E887BF9CD7A444BCBF6182589CE944A5",
  "pkgid": "76ED14CAA8D143DA89433DF0497AFBAF",
  "signsetname": "Steve Danger",
  "status": "Rdy_Sign",
  "signerid": "Signer0",
  "name": "Steve Danger",
  "email": "sdanger@edoclogic.com",
  "role": "0",
  "authcode": "",
  "cryptid":
"0303194B7597F654B955C02421C652A0287C4C14D5221B99B6DF5774E9E0846B5
550",
  "createdby": "MR_USER@CUA123",
  "createdon": "03/29/2016"
}]
}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Doc ID 76ED14CAA8D143DA89433DF0497AFBAF not found."
}

```

UPDATEDFC

The UPDATEDFC action receives signing element and signer data, and updates the .DFC file with the new information. JSON parameters for the request are listed below. The Control ID, Package ID, and Doc ID parameters are required.

Variable Name:	Description:
action	Set to "UPDATEDFC".
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	32-hex character reduced GUID identifying the document.
formname	The form name of the document.
pkgid	32-hex character reduced GUID identifying the package the document is associated with.
pkgname	Descriptive name of the package the document is associated with, 64-character max.
sigboxes	<p>An array of signing element and signer values, with each row containing 21 elements separated by semi-colons. Each row contains the following elements in the order listed below:</p> <ul style="list-style-type: none"> • SignSetID • X (floating point, percent of page width) • Y (floating point, percent of page height) • Width (floating point, percent of page width) • Height (floating point, percent of page height) • Sig Box Type (0=signature, 1=initials, 2=date, 3=signer text, 4=check box, 5=radio button, 6=user text) • Page (0-based) • Signer Name • Signer Email • Auth Code • Signer ID • Font Family • Font Size • Font Color • Passed Sign Set ID • Field Name • Field Label

	<ul style="list-style-type: none"> • Field Default Value, • Element Required ("0" or "1"), • Checked Value, • UnChecked Value
--	---

Sample Request:

METHOD: POST

URI: <https://eDSserver/ISAPI/RIP.dll/REST/DFC/>

JSON:

```
{
  "docid": "A0F7CADD23AF425D903B61FBAD5AC6BD",
  "session": "A748404DB9E247F2A2F0998879226F47",
  "controlid": "CUA123",
  "host": "172.23.18.245",
  "formname": "MyForm",
  "pkgid": "76E D14CAA8D143DA89433DF0497AFBAF",
  "sigboxes":
  ["1459554627326;12.908496732026144;12.752525252525252;44.607843137254
  9;4.1666666666666667;0;0;Steve Danger;sdanger
  @edoclogic.com;;E887BF9CD7A444BCBF6182589CE944A5;Arial;10;black;E887BF
  9CD7A444BCBF6182589CE944A5;;;1;;",

  "1459554627327;62.908496732026144;19.444444444444443;8.9869281045751
  63;3.914141414141414;1;0;Steve Danger;sdanger
  @edoclogic.com;;E887BF9CD7A444BCBF6182589CE944A5;Arial;10;black;E887BF
  9CD7A444BCBF6182589CE944A5;;;1;;",

  "1459554627328;60.947712418300654;14.52020202020202;16.0130718954248
  36;1.6414141414141414;2;0;Steve Danger;sdanger
  @edoclogic.com;;E887BF9CD7A444BCBF6182589CE944A5;Arial;13;black;E887BF
  9CD7A444BCBF6182589CE944A5;;;1;;",

  "1459554627329;14.052287581699346;21.464646464646463;43.627450980392
  155;1.89393939393939394;3;0;Steve Danger;sdanger
  @edoclogic.com;;E887BF9CD7A444BCBF6182589CE944A5;Arial;10;black;E887BF
  9CD7A444BCBF6182589CE944A5;FullName;Full Name;;0;;",

  "1459554627331;14.052287581699346;27.651515151515152;3.4313725490196
  076;2.525252525252525;4;0;Steve Danger;sdanger
  @edoclogic.com;;E887BF9CD7A444BCBF6182589CE944A5;Arial;10;black;E887BF
  9CD7A444BCBF6182589CE944A5;CheckBox1;0;0;0;True;False",
```

```
"1459554627332;22.875816993464052;27.904040404040405;2.6143790849673
203;1.893939393939394;5;0;Steve
Danger;sdanger@edoclogic.com;;E887BF9CD7A444BCBF6182589CE944A5;Arial;1
0;black;E887BF9CD7A444BCBF6182589CE944A5;RadioBtn1;0;0;0;Yes;"
```

```
"1459554627333;30.065359477124182;28.03030303030303;2.61437908496732
03;1.893939393939394;5;0;Steve Danger;sdanger
@edoclogic.com;;E887BF9CD7A444BCBF6182589CE944A5;Arial;10;black;E887BF
9CD7A444BCBF6182589CE944A5;RadioBtn1;0;0;0;No;"
]
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Doc ID A0F7CADD23AF425D903B61FBAD5AC6BD not found"
}
```

UPDATEREQUESTEDDOCINFO

The UPDATEREQUESTEDDOCINFO action receives new requested document information, and updates the .DFC file with the new information. JSON parameters for

the request are listed below. The Control ID, Package ID, and Doc ID parameters are required.

Variable Name:	Description:
action	Set to "UPDATEREQUESTEDDOCINFO"
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	32-hex character reduced GUID identifying the requested document.
formname	The form name of the document being requested.
pkgid	32-hex character reduced GUID identifying the package the document is associated with.
signsetlist	Array of signset ids that are required to upload this document. Currently only one ID is supported.
formmessage	The message to display to the signer when requesting the document.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/
JSON:
{
  "session": "B4DD77AEC566499EBE4275BAAA5B296B",
  "controlid": "CUA123",
  "formname": "DriversLicense",
  "formmessage": "Please upload a copy of your license",
  "action": "UPDATEREQUESTEDDOCINFO",
  "docid": "B3E39A684BEA479884A3B69E9E3D081A",
  "pkgid": "0BD3AF398954D9BE8414C5805C078E08",
  "signsetlist": ["E4F4ABA5BF1ACF70AD0B34002C99A51D"],
  "host": "172.23.1.92"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{ "result": true }
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

SENDEMAIL

The SENDEMAIL action sends the .PDF image file of the specified document to the given email address. If being sent to a signer that has an authentication code, the .PDF file is password protected with that code. If a user has specified a password for the file, it is protected with that password before sending.

Variable Name:	Description:
action	SENDEMAIL
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	32-hex character doc ID of the document to be sent.
email	The email address the document is sent to.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DFC/
JSON:
{
  "action": "SENDEMAIL",
  "host": "172.245.58.684",
  "session": "64B7806B0E2A4F20B6D23BAAE7ACABC5",
  "controlid": "CUA123",
  "docid": "456D14CAA8D143DA89433DF0497AFBAF",
  "email": "joe_customer@mymail.com"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{ "result": true }
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Doc ID 456D14CAA8D143DA89433DF0497AFBAF not found"  
}
```

/DOCUMENTS/FORMS

The DOCUMENTS/FORMS endpoint provides tools to search and retrieve documents from the 2020DOC system.

Actions:

Supported Actions: GETFORMS, GETFORM

GETFORMS

The GETFORMS action returns a list of documents found based on search criteria sent in the JSON request. This can also be called using the GET Method with no action specified. JSON parameters for the request are listed below:

Variable Name:	Description:
action	GETFORMS
session	The 32-character ID of the current authenticated session. Not required if using the encrypted handoff string below.
handoff	Encrypted handoff string – see Appendix A for details. Not required if using an active session.
host	IP Address of the client machine.
controlid	The institution identifier.
user	The username of the user making the request.
tableids	A JSON array of 2020DOC table IDs to be included in the search. Table IDs are case sensitive.
criteria	<p>A JSON array of search criteria in field name=value format. Each name=value pair is enclosed in quotes and separated by semi-colons. Values may contain a comparison operator in the first two characters. Valid operators are: "=", ">", "<", "<>", ">=", "<='". If no operator is specified, "=" is used.</p> <p>Values may contain the wildcard character "*" or "%", but this forces the query to use the SQL "LIKE" operator. Multiple</p>

	criteria are logically AND'd together. NOTE: Fields specified in the criteria must be present in all tables specified in the tableids list.
fields	An array of output fields to be included in the result. If not specified in this list, the system field <code>_Doc_ID</code> is always returned first, followed by the other fields in this list in the order specified. Any fields in this list will be omitted from the result if they are not common to all the tables specified in the tableids list.
orderby	The current contents of the SQL ORDER BY clause.
neworderby	The requested contents of the SQL ORDER BY clause.
searchstart	The first record in the SQL LIMIT clause.
searchlimit	The record count in the SQL LIMIT clause. This overrides the value read from the RAP RDI.ini settings file for the control ID.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DOCUMENTS/
JSON:
{
  "action": "GETFORMS",
  "controlid": "CUA123",
  "host": "78.548.24.456",
  "user": "JOEUSER_CUA123",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "tableids":
  [
    "Member_Docs",
    "Loans"
  ],
  "criteria": [
    {"DATE_FROM__Created_On": "06/01/2017"},
    {"DATE_TO__Created_On": "06/20/2017"},
    {"field1": "value1"},
    {"field2": "value2"},
    {"field3": "value3"}
  ],
  "fields":
  [
    "Form",
    "_Created_By"
  ]
}

```

```

    "_Created_On",
    "Field1",
    "Field2",
    "Field3"
  ]
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
documents	Array of document data for documents which met the search criteria.
session	The ID of the active session that was included in the request, or created from the secure handoff. This Session can be used in a request to retrieve the image for a document in the result documents list.

- Sample successful response JSON:

```

{
  "result": true,
  "session": "ABCDEF0123456789ABCDEF0123456789",
  "documents":
  [
    {
      "id": "18068666606AA4EE8B763E4E1069AA12",
      "form": "New Member Application",
      "createdby": "JOEUSER",
      "created": "06/14/2017",
      "field1": "value1",
      "field2": "value2", //These are additional fields specified in the request
      "field3": "value3"
    }
  ],
}

```

```
{
  "id": "84A1935735D7A21EA845D3D47F23B321",
  "form": "Driver License",
  "createdby": "JOEUSER",
  "created": "06/13/2017"
  "field1": "value1",
  "field2": "value2", //These are additional fields specified in the request
  "field3": "value3"
}
]
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "No user specified."
}
```

GETFORM

The GETFORM action returns a file stream for a specific document. JSON parameters for the request are listed below:

Variable Name:	Description:
action	GETFORM
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	Requested document ID
tableid	Table ID for the document. If none is specified, it will be looked up from the Doc ID.
outputtype	Request file type of the returned document (will default to .PDF if not set). For a completed eDOCSignature document with the output type of "PDF_AUD", the eSign audit info pages will be appended to the end of the document.

Sample Request:

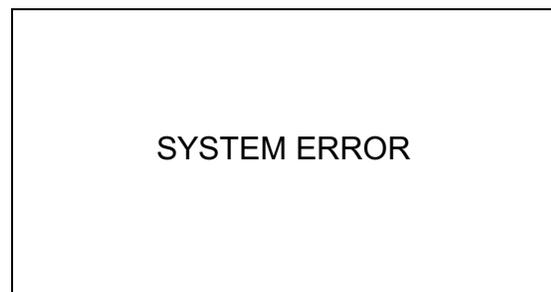
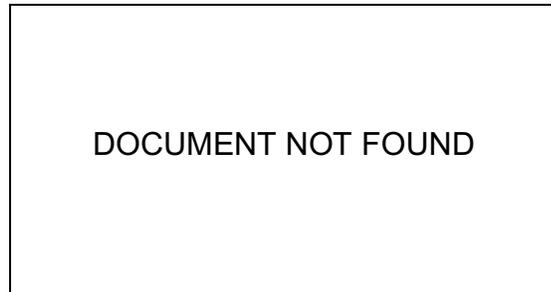
```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DOCUMENTS/
JSON:
{
  "action": "GETFORM",
  "host": "78.548.24.456",
  "controlid": "CUA123",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "docid": "AB45D4645DA3785D456721546189A54A",
  "tableid": "Loans",
  "outputtype": "PDF_AUD"
}

```

Response:

This function should always return a streamed image. If successful, the requested document image will be returned. If the item is not found, a substitute image with a "not found" message will be returned. If an error occurs, a "system error" substitute image will be streamed back.



/DOCUMENTS/PACKAGES

The DOCPACKAGES resource provides tools to search and retrieve packages in the 2020DOC system.

Actions:

Supported Actions: GETPACKAGES, GETSEARCHCRITERIA

GETPACKAGES

The GETPACKAGES action returns a list of packages based on search criteria. Below is a list of JSON parameters that can be used to execute a search. This can also be executed using the GET method with no action specified.

Variable Name:	Description:
action	GETPACKAGES
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
createdby	Username of user who created the package.
fromdate	Earliest "Created_On" date.
todate	Latest "Created_On" date.
name	Name (or part of name) of the package. The search will return records with a partial match anywhere for this value.
type	Package type.
status	Status of the package. Valid package statuses include: <ul style="list-style-type: none"> • "Canceled" • "Closed" • "Completed" • "Cnx eSign" • "Created Online"

	<ul style="list-style-type: none"> • "Data Edited" • "Declined" • "Document Added" • "Documents Signed" • "Open" • "Out for eSign" • "Ready To Sign" • "Waiting for Doc"
orderby	The SQL LIMIT/ORDER BY clause. Defaults to "Created_On DESC" (creation date in descending order).

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DOCCUMENTS/PACKAGES/
JSON:
{
  "action": "GETPACKAGES",
  "host": "78.548.24.456",
  "controlid": "CUA123",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "fromdate": "01/01/2017",
  "todate": "06/30/2017",
  "status": "Completed"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
packages	<p>A JSON array of packages that match the search criteria. Each package row contains the following parameters:</p> <ul style="list-style-type: none"> • id – the 32-hex character reduced GUID for the package. • name – the package name. • status – the package status. Possible values include: <ul style="list-style-type: none"> • "Canceled" • "Closed" • "Completed" • "Cnx eSign" • "Created Online" • "Data Edited" • "Declined" • "Document Added" • "Documents Signed" • "Open" • "Out for eSign" • "Ready To Sign" • "Waiting for Doc" • createdby – the username of the user who created/owns the package. • fullname – the full name of the user who created/owns the package. • created – the date/time the package was created • documents – a JSON array of documents. Each document row has the following values: <ul style="list-style-type: none"> • docid – the 32-hex character reduced GUID for the document. • form – the form name of the document. • status – the package document status. Possible values include "Saved", "Complete", "Pending",

	<p>“Missing”, “Optional”, “In Transit”, “Rdy eSign”, “eSign”, “eSigned”, “Declined”, “Canceled”, “Replaced”, “Deleted”, “Part Signed”, “Reference”, “Requested”.</p> <ul style="list-style-type: none"> • packageid - the 32-hex character reduced GUID for the package. • createdby – the username of the user who created the document. • created – the date/time the document was created.
--	--

- Sample successful response JSON:

```

{
  "result": true,
  "packages": [{
    "id": "18068666606AA4EE8B763E4E1069AA27",
    "name": "EOB 06/14/2017",
    "status": "Completed",
    "createdby": "JOEUSER",
    "fullname": "Joe User",
    "created": "06/14/2017",
    "documents": [{
      "docid": "135DC2B1A3A9464EA04CDB029E1879BE",
      "form": "EOB",
      "status": "Complete",
      "packageid": "18068666606AA4EE8B763E4E1069AA27",
      "createdby": "JOEUSER",
      "created": "06/14/2017"
    }
  ]
}, {
  "id": "84A1935735D7A21EA845D3D47F23B924",
  "name": "health-questionnaire 06/13/2017",
  "status": "Ready To Sign",
  "createdby": "JOEUSER",
  "fullname": "Joe User",
  "created": "06/13/2017",
  "documents": [{
    "docid": "A82B6D4FD72B442F92E064EC456B3F06",
    "form": "health-questionnaire",
    "status": "Rdy eSign",
    "packageid": "18068666606AA4EE8B763E4E1069AA27",
    "createdby": "JOEUSER",
  ]
}

```

```

    "created": "06/13/2017"
  }
}
}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}

```

GETSEARCHCRITERIA

The GETSEARCHCRITERIA action returns contents of the drop-down lists used on the package search page. These include users, package types, and statuses. JSON parameters for the request are listed below.

Variable Name:	Description:
action	GETSEARCHCRITERIA
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/DOCUMENTS/PACKAGES/
JSON:
{
  "action": "GETSEARCHCRITERIA",
  "controlid": "CUA123",
  "session": "2231F345123456789ABCDEF0123456712",
  "host": "78.548.24.456",
}

```

dResponse Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
packagetypes	A JSON array of package types for the control ID.
statuses	A JSON Array of possible package status values.
users	A JSON Array of users for the control ID and global users.

- Sample successful response JSON:

```
{
  "result":true,
  "packagetypes":
  [
    "Mortgage",
    "HELOC",
    "Line of Credit"
  ],
  "statuses":
  [
    "Open",
    "Data Edited",
    "Document Added",
    "Ready To Sign",
    "Documents Signed",
    "Out for eSign",
    "Cnx eSign",
    "Completed",
    "Closed",
    "Declined",
    "Canceled",
    "Created Online",
    "Waiting for Doc"
  ],
}
```

```
“users”:  
[  
  “LARRY_CUA123”,  
  “CURLY_CUA123”,  
  “MOE”  
]  
}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Control ID not specified."  
}
```

/PACKAGES

The Package resource provides tools to create, modify, and delete packages in the eDOCSignature system.

End Points:

/PACKAGES/

Supported Methods:

DELETE – executes the DELETE action described below.

POST – Supports various actions as described below.

Actions:

Supported Actions: ADDENVELOPEDOCS, CANCEL, CLOSE, CREATE, CREATEFRFROMTEMPLATES, DELETE, GETPACKAGESIGNINGSTATUS, GETTEMPLATEIDS, RESET, SEARCH, SEND, SIGNERS

ADDENVELOPEDOCS

The ADDENVELOPEDOCS action is used to send a list of “expected” documents that are being uploaded to a specified package. These are added to the “Envelope_Docs” SQL tale and are removed as the documents are uploaded. The sending of notifications is delayed until the last document is uploaded. JSON parameters for the request are listed below.

Variable Name:	Description:
action	ADDENVELOPEDOCS
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	Encrypted handoff string. (See Appendix A on “Building Encrypted Handoff Strings”). Not required if session is used.
host	IP Address of the client machine.
controlid	The institution identifier.
envelopedocs	A JSON array of named pairs, with the following elements: <ul style="list-style-type: none"> • docid – A 32-hex character reduced GUID identifying the document. • pkgid - A 32-hex character reduced GUID identifying the package.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "ADDENVELOPEDOCS",
  "controlid": "CUA123",
  "host": "127.0.0.1",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "envelopedocs": [
    {
```

```

        "docid":"FE2BDB091C8DACCA57F15FF45AD9BBCF",
        "pkgid":"ABCDEF0123456789ABCDEF0123456789"
    },
    {
        "docid":"791C8DACCAFE2BDB57F19BBC5FF45AD5",
        "pkgid":"ABCDEF0123456789ABCDEF0123456789"
    }
]
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```

{"result":true}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Error inserting record into Envelope_Docs table"
}

```

CANCEL

The CANCEL action stops the signing process for all documents in the specified package which have not already been completed. The package and all non-completed document statuses are set to "Canceled", which stops the signing process. JSON parameters for the request are listed below.

Variable Name:	Description:
action	CANCEL
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	Encrypted handoff string. (See Appendix A on "Building Encrypted Handoff Strings"). Not required if session is used.
host	IP Address of the client machine.
controlid	The institution identifier.
packageid	A 32-character reduced GUID identifying the package.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "CANCEL",
  "controlid": "CUA123",
  "host": "127.0.0.1",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "pkgid": "ABCDEF0123456789ABCDEF0123456789"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": " No Package ID given"  
}
```

CLOSE

The CLOSE action puts all documents and signsets in the package in a final, closed and locked state. This is a way to close a signing event if the remaining unsigned signatures are not required. JSON parameters for the request are listed below.

Variable Name:	Description:
action	CLOSE
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	Encrypted handoff string. (See Appendix A on "Building Encrypted Handoff Strings"). Not required if session is used.
host	IP Address of the client machine.
controlid	The institution identifier.
packageid	A 32-character reduced GUID identifying the package.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "CLOSE",
  "controlid": "CUA123",
  "host": "72.56.25.458",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "pkgid": "ABCDEF0123456789ABCDEF0123456789"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

CREATE

The CREATE action creates a new, empty package and returns the package ID. If the package ID is included in the request, it will be used when creating the package. If it already exists, an error will be returned. A name for the package must be given, as well as the user name of the package creator. The user must be a valid user not locked out or expired. JSON parameters for the request are listed below.

Variable Name:	Description:
action	CREATE
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	Encrypted handoff string. (See Appendix A on "Building Encrypted Handoff Strings"). Not required if session is used.
host	IP Address of the client machine.
controlid	The institution identifier.
packageid	A 32-character reduced GUID identifying the package. If left blank, a new one will be created.
pkgname	The name of the package. Required. 64-characters maximum length.
username	The user name of the package creator. Must be an existing user, not locked out and password not expired.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "CREATE",
  "controlid": "CUA123",
  "host": "72.56.58.564",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "username": "JUSER_CUA123"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
pkgid	The 32-hexcharacter reduced GUID of the package that was created.

- Sample successful response JSON:

```
{"result":true,"pkgid":"234AB98734F7E8D98734F7F7E8D98734"}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "No user name specified"  
}
```

CREATEFROMTEMPLATES

The CREATEFROMTEMPLATES action creates a new package using a list of existing templates for the control ID. JSON parameters for the request are listed below.

Variable Name:	Description:
action	CREATEFROMTEMPLATES
controlid	The institution identifier.
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	Encrypted handoff string. (See Appendix A on "Building Encrypted Handoff Strings"). Not required if session is used.
host	IP Address of the client machine.
pkgname	Name of the new package to create.
user	User creating the package.
templates	Array of template data to be used when creating the new documents.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "CREATEFROMTEMPLATES",
  "controlid": "CUA123",
  "host": "78.548.24.456",
  "session": "ABCDEF0123456789ABCDEF0123456789",
  "pkgname": "New Member Package for George",
  "user": "JOEUSER",
  "templates": [{
    "template": "New Member Info",
    "data": [{
      "FirstName": "John",

```

```

        "LastName": "Smith"
    }
  ], {
    "template": "New Member Agreement",
    "data": [{
      "FirstName": "John",
      "LastName": "Smith"
    }]
  }
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
id	ID of newly created package.
documents	Array of document IDs created for the package.

- Sample successful response JSON:

```

{
  "result": true,
  "id": "92346543210FEDCBA9876543210FEDC3B",
  "documents": [{
    "name": "New Member Info",
    "id": "CC546B2E48C3457DBD9E6BA2DE45083D"
  }, {
    "name": "New Member Agreement",
    "id": "CC546B2E48C3457DBD9E6BA2DE45083D"
  }]
}

```

- Sample unsuccessful response JSON:

```
{  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

DELETE

The DELETE action deletes a package and all associated signsets and documents. Signer records are not deleted from the local browser cache. JSON parameters for the request are listed below.

Variable Name:	Description:
action	DELETE
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	Encrypted handoff string. (See Appendix A on "Building Encrypted Handoff Strings"). Not required if session is used.
host	IP Address of the client machine.
controlid	The institution identifier.
packageid	A 32-character reduced GUID identifying the package.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "DELETE",
  "controlid": "CUA123",
  "host": "72.56.58.564",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "pkgid": "ABCDEF0123456789 ABCDEF0123456789"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

GETPACKAGESIGNINGSTATUS

The GETPACKAGESIGNINGSTATUS action returns the signing status for all signers and documents in a package. JSON parameters for the request are listed below.

Variable Name:	Description:
action	GETPACKAGESIGNINGSTATUS
controlid	The institution identifier.
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	Encrypted handoff string. (See Appendix A on "Building Encrypted Handoff Strings"). Not required if session is used.
host	IP Address of the client machine.
packageid	A 32-character reduced GUID identifying the package.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "GETPACKAGESIGNINGSTATUS",
  "controlid": "CUA123",
  "host": "72.56.58.564",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "pkgid": "ABCDEF0123456789ABCDEF0123456789"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
signingstatus	<p>An array of records, one for each document in the package. Each row in the array has the following variables:</p> <ul style="list-style-type: none"> • pkgid (32-character reduced GUID identifying the package) • pkgstatus (Package status) • pkgmodifiedon (date the package was modified MM/DD/YYYY format) • docid (32-character reduced GUID identifying the document) • docsigned (0=unsigned; 1=signed; 2=declined) • declinereason (The reason for declining to sign document) • signsetid (32-character reduced GUID identifying the signing set) • signsetcreatedon (date the signing set was created) • signsetstatus (Signed or Unsigned) • signerid (Signer ID) • signername (full name of signer) • signeremail (email address of signer) • signeraudthcode (signer authentication code) • signertier (signing order group)

- Sample successful response JSON:

```
{
  "result": true,
```

```
"pkgid": "9876543210FEDCBA9876543210FEDCBA",
"pkgstatus": "",
"pkgmodifiedon": "06/15/2016",
"docid": "CC546B2E48C3457DBD9E6BA2DE45083D",
"docsigned": "",
"declinereason": "NSF",
"signsetid": "B8BD3DF2F1EE3765B8BD3DF2F1EE3765",
"signsetcreatedon": "06/15/2016",
"signsetstatus": "signed",
"signerid": "390BD89C3095EFA980DC987632ABCDEF",
"signername": "John Does",
"signeraudthcode": "12345",
"signertier": ""
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

GETTEMPLATEIDS

The GETTEMPLATEIDS action returns a list of templates associated with a specified package. These records are created in the CREATEFROMTEMPLATES action in the PACKAGES resource. JSON parameters for the request are listed below.

Variable Name:	Description:
action	RESET
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
packageid	A 32-character reduced GUID identifying the package.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "GETTEMPLATEIDS",
  "controlid": "CUA123",
  "host": "127.0.0.1",
  "session": "C57DACCF15FF45AD94472BDB091C8BCF",
  "pkgid": "ABCDEF0123456789ABCDEF0123456789"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{
  "result":true,
  "templates":[
    "D83449BB32A4375FD4987BC2A4339551",
    "B6983F387BB2CE6029A734E4288D6322"
  ]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Package ID not specified."
}
```

RESET

The RESET action puts all signsets and documents in the package back to their initial state when the document was first created/imported in the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	RESET
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
packageid	A 32-character reduced GUID identifying the package.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "RESET",
  "controlid": "CUA123",
  "host": "23.231.43.23",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "pkgid": "ABCDEF0123456789ABCDEF0123456789"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

SEARCH

The SEARCH action returns a list of packages that meet certain search criteria. JSON parameters for the request are listed below. It returns a list of packages that meet the search criteria.

Variable Name:	Description:
action	SEARCH
controlid	The institution identifier.
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	Encrypted handoff string. (See Appendix A on "Building Encrypted Handoff Strings"). Not required if session is used.
host	IP Address of the client machine.
createdby	Search criteria - user who created the package. Leave blank for "created by any user".
formname	Search criteria - package or document name. Leave blank for "any package or form".
search	Search criteria - signer name or email address. Leave blank for "any signer or email address".
fromdate	Start of date range (mm/dd/yyyy) for package creation date. Leave blank for no "created after" criteria.
todate	End of date range (mm/dd/yyyy) for package creation date. Leave blank for no "created before" criteria.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "session": "40292B894652492A8459A684F3E0E79E",
  "host": "65.54.58.564",
  "createdby": "JOEUSER@CUA123",
  "action": "SEARCH",
  "formname": "odometer",

```

```

"search": "roger",
"controlid": "CUA123",
"fromdate": "04/01/2016",
"todate": "05/31/2016"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
packages	<p>An array of information for each package that met the search criteria. Each row includes the elements:</p> <ul style="list-style-type: none"> • id (Package ID) • name (package name) • status (package status) • createdby (the name of the user who created the package) • created (the date the package was created) • documents (an array of documents in the package) <p>The documents array contains the following elements for each document in the package:</p> <ul style="list-style-type: none"> • docid (the 32-character reduced GUID for the document) • form (the form name) • packageid (the 32-character GUID for the package) • createdby (the name of the user who created the document) • created (the date the document was created)

- Sample successful response JSON:

```

{
  "result": true,
  "packages": [{
    "id": "4B13121206DF4C238490166CB81E1DFD",
    "name": "Odometer Disclosure_JUSER_20160512_093901",
    "status": "Completed",
    "createdby": "JOEUSER@CUA123",
    "fullname": "Joe User",
    "created": "05/12/2016",
    "documents": [{
      "docid": "B048E5FB840040019EBE59DDA0A7217C",
      "form": "Odometer Disclosure",
      "status": "Complete",
      "packageid": "4B13121206DF4C238490166CB81E1DFD",
      "createdby": "JOEUSER@CUA123",
      "created": "05/12/2016"
    }]
  },
  {
    "id": "4C2384121206DF B81E1D90166C4B13FD",
    "name": "Bill od Sale_JUSER_20160514_112931",
    "status": "Completed",
    "createdby": "JOEUSER@CUA123",
    "fullname": "Joe User",
    "created": "05/14/2016",
    "documents": [{
      "docid": " E59DDB840040019EB21A0A7B048E5F7C",
      "form": "Bill of Sale",
      "status": "Complete",
      "packageid": "4C2384121206DF B81E1D90166C4B13FD ",
      "createdby": "JUSER@CUA123",
      "created": "05/14/2016"
    }]
  }
]
}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}

```

SEND

The SEND action sends an email containing the authentication code and another email containing the "ticket" hyperlink for signing the document. This is done for all signers in the package. JSON parameters for the request are listed below.

Variable Name:	Description:
action	SEND
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
packageid	A 32-character reduced GUID identifying the package.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "SEND",
  "controlid": "CUA123",
  "host": "85.54.578.54",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "pkgid": "ABCDEF0123456789ABCDEF0123456789"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

SIGNERS

The SIGNERS action returns a list of signer names, email addresses, and authentication codes for all documents in the package. JSON parameters for the request are listed below.

Variable Name:	Description:
action	SIGNERS
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
packageid	A 32-character reduced GUID identifying the package.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "SIGNERS",
  "controlid": "CUA123",
  "host": "178.56.48.574",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "pkgid": "ABCDEF0123456789 ABCDEF0123456789"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.

error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
signers	An array of signer records, each row containing the following named fields: <ul style="list-style-type: none"> • id (sign set id) • name (full name of the signer) • email (signer email address) • authcode (authentication code for the signer)

- Sample successful response JSON:

```

{
  "result": true,
  "signers": [{
    "id": "23B723B7CDA27F3875CCCDA27F3875CD",
    "name": "Steve Danger",
    "email": "sdanger@mymail.com",
    "authcode": "12345"
  },
  {
    "id": "CDA27F3875CD23B723B7CDA27F3875DD",
    "name": "Roger Risk",
    "email": "rrisk@mymail.com",
    "authcode": "12345"
  }
]
}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}

```

/SESSIONS

The SESSIONS resource manages sessions controlling access to all API resources. A session is created by manual login or through a secure handoff. Logins can be of two basic types: one for institution employees ("Users"), and the other for customers of the institution ("Customers"). There are several types of secure handoffs to provide single sign-on (SSO) capability from third party applications, and for communication and transfer between different components of the eDOC system. Once a session is created, its ID is always passed in the JSON of subsequent requests.

End Points:

/SESSIONS/

Supported Methods: GET, POST

/SESSIONS/{logintype}

Supported Methods: POST

/SESSIONS/{session}

Supported Methods: GET

Methods:

POST

The POST method creates a session by login or secure handoff. If the login type is not specified in the URI, it will be read from the JSON data. JSON parameters for POST requests can include:

Variable Name:	Description:
logintype	Determines the type of login or secure handoff to be executed. Supported login types include: <ul style="list-style-type: none">• User• Customer

	<ul style="list-style-type: none"> • Enroll • Info • SOS • RemDep • Update • Caller • Handoff • eDOCSignature • XChange Client • Active Directory. <p>If no logintype is passed, the default type is "user".</p>
controlid	The institution identifier. Required for all customer login types (customer, enroll, update, caller, info, SOS, and RemDep) and eDOCSignature handoffs. Can also be passed in User and system handoffs.
handoff	Encrypted handoff string. (See Appendix B on "Building Encrypted Handoff Strings")
user	The username for user logins or the account number for customer logins.
password	The password for the user logins or PIN/password for customer logins.
passwordhash	The SHA1 hash of the user password or customer PIN/password, which may be sent in place of the "password" variable.
host	The client host IP address, required for all requests.
edocsig	Encrypted handoff string from ProDOC for eDOCSignature features. If found, the "logintype" will be automatically set to eDOCSig and the "handoff" variable will be assigned this value.
roleidlist	A list of security group names for which the user is a member, delimited by CR/LF. Used in Active Directory handoffs.

Sample Request:

- User Login:

URI:

```
.../REST/SESSIONS/
```

JSON:

```
{
  "logintype": "user",
```

```

"user": "jdoes",
"passwordhash": "0123456789ABCDEF0123456789ABCDEF ",
"host": "127.0.0.1"
}

```

- Customer Login:

URI:
 .../REST/SESSIONS/

JSON:

```

{
  "logintype": "customer",
  "user": "2020-0-0",
  "passwordhash": "0123456789ABCDEF0123456789ABCDEF",
  "host": "127.0.0.1",
  "controlid": "CUA123"
}

```

Response Parameters:

Variable Name:	Description:
result	Set to "true" if the login or handoff was successful. Will be set to "false" if the login or handoff was not successful or an error occurred.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
session	The ID of the session created through the login or secure handoff. A 32-character string, which must be passed in the headers of any requests to other resources in the eDOCSignature system.
warningmessage	This variable is blank unless the user password is nearing expiration (Example: "Your password will expire in 3 days").
forcechange	Set to "true" or "false". If true, the user should be forced to change their password in the eDOC system.

controlids	A list of Control IDs in which the user has at least one permission.
permissions	A list of permissions the user has in the current ControlID. Permissions are encapsulated in double quotes and separated by commas.
sessionlife	The number of minutes the session will be allowed to continue without further requests.

- Sample authenticated user login response JSON:

```
{
  "result": true,
  "username": "JDOES",
  "email": "jdoes@edoclogic.com",
  "session": "ABCDEF1234567890ABCDEF1234567890",
  "sessionlife": 15,
  "warningmessage": "",
  "forcechange": false,
  "controlids": ["CUA123"],
  "permissions": ["Change Own Password", "CheckLogic Scan Items", "CheckLogic View Reports", "COLD Add note", "COLD View Reports", "View Statements"]
}
```

- Sample rejected authentication JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Unable to connect to server"
}
```

GET

The GET method validates a session. If the Session ID must be included, either in the URI or in the JSON. The JSON data can contain the following variables:

Variable Name:	Description:
session	The 32-hex character ID of the session.
host	Client host IP address. Required for all requests.

Sample Request:

METHOD: GET

URI:

<https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/>

JSON:

```
{  
  "session": "75E6FF973ADE49A795AEAF6961E228A3",  
  "host": "127.0.0.1"  
}
```

or

URI:

<https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/75E6FF973ADE49A795AEAF6961E228A3?host=127.0.0.1>

The following JSON variables will be returned:

Variable Name:	Description:
result	Will be set to "true" if the session is valid and not expired. Will be set to "false" if the session was invalid, expired, or an error occurred.

error	Error message text. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
session	The 32-character hex ID of the current active session.
permissions	An array of permissions the user has in the current ControlID. Permissions are enclosed in double quotes and separated by commas. Only included for user sessions.
account	The customer account number for the session. Only included for customer sessions.
sessionlife	Number of minutes this session will be allowed to continue without further requests.

Sample Response:

- Sample successful response JSON:

```
{
  "result": true,
  "session": "11DD991FFC7B43B9BB7E47D7752E4585",
  "account": "2020-0-0",
  "sessionlife": 15
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

Actions:

Supported Actions: CHANGE_CONTROL_ID, DELETE, EDOCITLINK, EDOCSIGN, FORGOTPASSHANDOFF, HANDOFF, SQLTEST

CHANGE_CONTROL_ID

The CHANGE_CONTROL_ID action returns a new session with the designated ControlID.

Variable Name:	Description:
action	CHANGE_CONTROL_ID.
controlid	The institution identifier.
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
username	The username.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/
JSON:
{
    "action": "CHANGE_CONTROL_ID",
    "controlid": "CUA123",
    "host": "78.56.458.56",
    "session": "75E6FF973ADE49A795AEAF6961E228A3",
    "username": "JOEUSER@CUA123"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

session	The 32-character ID of the session for the new control ID.
----------------	--

- Sample successful response JSON:

```
{  
  "result": true,  
  "session": "390BD89C3095EFA980DC987632ABCDEF"  
}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

DELETE

The DELETE action ends the current session. It is the equivalent of logging off the user or customer.

Variable Name:	Description:
action	DELETE
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.

Sample Request:

```
METHOD: DELETE/POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/
JSON:
{
  "action": "DELETE",
  "session": "75E6FF973ADE49A795AEAF6961E228A3",
  "host": "57.58.654.52"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

EDOCITLINK

The EDOCITLINK action returns the handoff parameters that the eDOC-It Printer Client will use to send documents up to eDOCSignature. JSON parameters for EDOCITLINK requests include:

Variable Name:	Description:
action	EDOCITLINK
controlid	The institution identifier.
link	The authentication code to be verified.
host	IP Address of the client machine.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/
JSON:
{
  "action": "EDOCITLINK",
  "controlid": "CUA123",
  "host": "198.25.123.21",
  "link": "XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

fullname	The full name of the user.
name	The username.
email	The email of the user.
companyname	The license name for the institution.
controlid	The institution identifier.
crypttype	The type of encryption to use in secure requests.
initvector	The initialization vector, if applicable. Set to "RANDOM" if random initialization vectors are desired.
includeinitvector	Set "true" if an initialization vector is being used.
usegmt	Set "true" if using Greenwich mean time in handoff.
key	The handoff key.

- Sample successful response JSON:

```
{
  "result": true,
  "fullname": "Joe User",
  "name": "Juser",
  "email": "juser@CUA123.com",
  "companyname": "TestCU",
  "controlid": "CUA123",
  "crypttype": "DES3CBC",
  "initvector": "RANDOM",
  "includeinitvector": true,
  "usegmt": true,
  "Key": "XXXXXXXXXXXXXX"
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

EDOCSIG

The EDOCSIG action returns the parameters for a specified user. JSON parameters for EDOCSIGN requests include:

Variable Name:	Description:
action	EDOCSIG
controlid	The institution identifier.
host	IP Address of the client machine.
handoff	Encrypted handoff string. (See Appendix B on "Building Encrypted Handoff Strings")
username	The username.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/
JSON:
{
  "action": "EDOCSIG",
  "controlid": "CUA123",
  "host": "23.57.51.245",
  "handoff":
  "DACCA57F15FF45AD9BFE2BDB091C8BCF9UBm77mMfbvL4d5Rdt8O1LiDNPCfTdU
q3TpzKNYIwDuButxfebqWG3LVX4mdj3mcLeEhbvVkOT69qK5k5ZQYAaRZnSbzdwb
X3QURjI%2F4TvzyEz7EIAFf8X9FxueX75%2B",
  "username ": "Juser"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".

systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
controlid	The institution identifier.
username	The username.
email	The email of the user.
fullname	The full name of the user.
session	The 32-character ID of the current active session.
sessionlife	The number of minutes the session will be allowed to continue without further requests.
warningmessage	This variable is blank unless the user password is nearing expiration (Example: "Your password will expire in 3 days").
forcechange	Set to "true" or "false". If true, the user should be forced to change their password in the eDOC system.
controlids	A list of Control IDs in which the user has at least one permission.
permissions	A list of permissions the user has in the current ControlID. Permissions are encapsulated in double quotes and separated by commas.

- Sample successful response JSON:

```
{
  "result": true,
  "controlid": "CUA123",
  "username": "Juser",
  "email": "juser@CUA123",
  "fullname": "Joe Test User",
  "session": "ABCDEF1234567890ABCDEF1234567890",
  "sessionlife": 15,
  "warningmessage": "",
  "forcechange": false,
  "controlids": ["CUA123"],
  "permissions": ["Change Own Password", "CheckLogic Scan Items",
    "CheckLogic View Reports", "COLD Add note", "COLD View Reports"]
}
```

- Sample unsuccessful response JSON:

```
{
```

```
“result”: false,  
“error”: “Server had an error processing the request”,  
“systemerror”: “Invalid Session”  
}
```

FORGOTPASSHANDOFF

The FORGOTPASSHANDOFF action resets the users locked out status. JSON parameters for EDOCSIGN requests include:

Variable Name:	Description:
action	FORGOTPASSHANDOFF
controlid	The institution identifier.
host	IP Address of the client machine.
forgotpass	Encrypted handoff string. (See Appendix on "Building Encrypted Handoff Strings")

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/
JSON:
{
  "action": "FORGOTPASSHANDOFF",
  "controlid": "CUA123",
  "host": "47.578.23.564",
  "forgotpass":
  "Dacca57F15FF45AD9BFE2BDB091C8BCF9UBm77mMfbvL4d5Rdt8O1LiDNPCfTdU
q3TpzKNYIwDuButxfebqWG3LVX4mdj3mcLeEhbvVkOT69qK5k5ZQYAaRZnSbzdwb
X3QRjI%2F4TvzyEz7EIAf8X9FxueX75%2B"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only

returned if result is "false".

- Sample successful response JSON:

```
{“result”:true}
```

- Sample unsuccessful response JSON:

```
{  
  “result”: false,  
  “error”: “Server had an error processing the request”,  
  “systemerror”: “Invalid Session”  
}
```

HANDOFF

The HANDOFF action returns the parameters for a specified user. JSON parameters for EDOCSIGN requests include:

Variable Name:	Description:
action	HANDOFF
controlid	The institution identifier.
host	IP Address of the client machine.
handoff	Encrypted handoff string. (See appendix on "Building Encrypted Handoff Strings")
username	The username.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/
JSON:
{
  "action": "HANDOFF",
  "controlid": "CUA123",
  "host": "156.45.57.564",
  "handoff":
  "DACCA57F15FF45AD9BFE2BDB091C8BCF9UBm77mMfbvL4d5Rdt8O1LiDNPCfTdU
q3TpzKNYIwDuButxfqbqWG3LVX4mdj3mcLeEhbvVkOT69qK5k5ZQYAaRZnSbzdwb
X3QURjI%2F4TvzyEz7EIAFf8X9FxueX75%2B",
  "username": "Juser"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".

systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
controlid	The institution identifier.
username	The username.
email	The email of the user.
fullname	The full name of the user.
session	The 32-character ID of the current active session.
sessionlife	The number of minutes the session will be allowed to continue without further requests.
warningmessage	This variable is blank unless the user password is nearing expiration (Example: "Your password will expire in 3 days").
forcechange	Set to "true" or "false". If true, the user should be forced to change their password in the eDOC system.
controlids	A list of Control IDs in which the user has at least one permission.
permissions	A list of permissions the user has in the current ControlID. Permissions are encapsulated in double quotes and separated by commas.

- Sample successful response JSON:

```
{
  "result": true,
  "controlid": "CUA123",
  "username": "Juser",
  "email": "juser@CUA123",
  "fullname": "Joe Test User",
  "session": "ABCDEF1234567890ABCDEF1234567890",
  "sessionlife": 15,
  "warningmessage": "",
  "forcechange": false,
  "controlids": ["CUA123"],
  "permissions": ["Change Own Password", "CheckLogic Scan Items",
    "CheckLogic View Reports", "COLD Add note", "COLD View Reports"]
}
```

- Sample unsuccessful response JSON:

```
{
```

```
“result”: false,  
“error”: “Server had an error processing the request”,  
“systemerror”: “Invalid Session”  
}
```

SQLTEST

The SQLTEST action tests the SQL connection. JSON parameters for EDOCSIGN requests include:

Variable Name:	Description:
action	SQLTEST
controlid	The institution identifier.
host	IP of the client machine.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SESSIONS/
JSON:
{
  "action": "SQLTEST",
  "host": "84.57.68.41",
  "controlid": "CUA123"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. Only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Unable to connect to server"  
}
```

/SIGNSET

The Sign Set resource provides tools to create, modify, and delete Signing Sets in the eDOCSignature system.

End Points:

/SIGNSETS/

Methods:

GET – Performs a search for signsets matching the search criteria.

POST – Performs various sign set actions (See Actions list below).

Actions:

HANDOFF, UPDATESIGNER, CANCEL, GETHANDOFF, SEARCHDOCS, AUTHCODE, TICKET, SENDAUTHCODE, EDITSIGNERS, EMAIL, DECLINE

GET (No Action Specified)

The GET method retrieves the document sign set information for a given document and signer. This includes the background images and signing element data. The image files are streamed back in an http(s) file download.

Variable Name:	Description:
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	32-character reduced GUID which identifies the document.
signsetid	A 32-character reduced GUID identifying the sign set.

Sample Request:

```

METHOD: GET
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSSETS/
JSON:
{
  "session": "0A0F2D1BEAAD40CFA6A21479C5AAD577",
  "host": "123.234.23.123",
  "docid": "CC546B2E48C3457DBD9E6BA2DE45083D",
  "signsetid": "10FA2D605468424BA2898AF996833B7C",
  "controlid": "CUA123"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
graphic	The filename of the document image being returned.
sigboxes	<p>A JSON array in named element format. Each row in the array contains the following parameters:</p> <ul style="list-style-type: none"> • left (floating point number – the horizontal position of the signing element from the left edge of the page expressed as a percentage of page width). • top (floating point number – the vertical position of the signing element from the top edge of the page expressed as a percentage of page height). • width (floating point number – the width of the signing element expressed as a percentage of page width). • height (floating point number – the height of the signing element expressed as a percentage of page height). • esigntype – "0" for signature, "1" for initials, "2" for date, "3" for signer text, "4" for check box,

	<p>"5" for radio button, "6" for user text.</p> <ul style="list-style-type: none"> • boxid – integer, zero-based. • pagenumber – integer, zero-based – the page the signing element appears on. • font – name of font family. • fontsize – integer the size (point) of the font for signing elements that have text. • fontcolor – Windows color name, e.g., "black" – the font color for the signing element. • fieldname – name of field for text, checkbox, or radio buttons. • fieldlabel – display name of text, checkbox, or radio button. • field defaultvalue – default value for text, checkbox, or radio button fields if no other field value is specified. • fieldrequired – "1" if required, "0" if not required – if required, the signer cannot complete signing until this element has been filled or clicked. • checkedvalue – value to be returned if a checkbox or radio button is checked. • uncheckedvalue – value to be returned if checkbox is not checked. • depfield – if this signing element is active only when another field has a certain value, this is the name of the field that this signing element is dependent on. • depfieldvalue – the value that the depfield must have for this signing element to be active. • depoperator – the operator used to compare the value of the depfield. Can be "=", "<>", ">", "<", ">=", or "<=". Defaults to "=".
--	--

- Sample successful response JSON:

```

{
  "result": true,
  "graphic":
  "CC546B2E48C3457DBD9E6BA2DE45083DCC546B2E48C3457DBD9E6BA2D
  E45083D.pdf",
  "sigboxes": [{
    "left": "10.9477119445801",

```

```

"top": "14.772727012634",
"width": "44.934638977051",
"height": "4.41919183731079",
"esigntype": "0",
"boxid": "0",
"pagenumber": "0",
"font": "Arial",
"fontsize": "10",
"fontcolor": "",
"fieldname": "",
"fieldlabel": "",
"fielddefaultvalue": "",
"fieldrequired": "1",
"checkedvalue": "",
"uncheckedvalue": "",
"depfield": "",
"depfieldvalue": "",
"depopoperator": ""
},
{
"left ": "59.803920745849",
"top": "15.782828330993",
"width": "16.339868545532",
"height": "2.5252525806427",
"esigntype": "2",
"boxid": "1",
"pagenumber": "0",
"font": "Arial",
"fontsize": "18",
"fontcolor": "",
"fieldname": "",
"fieldlabel": "",
"fielddefaultvalue": "",
"fieldrequired": "1",
"checkedvalue": "",
"uncheckedvalue": ""
"depfield": "",
"depfieldvalue": "",
"depopoperator": ""
},
{
"left": "45.098037719726",
"top": "21.085859298706",
"width": "16.339868545532",
"height": "4.41919183731079",
"esigntype": "1",

```

```

"boxid": "2",
"pagenumber": "0",
"font": "Arial",
"fontsize": "10",
"fontcolor": "",
"fieldname": "",
"fieldlabel": "",
"fielddefaultvalue": "",
"fieldrequired": "1",
"checkedvalue": "",
"uncheckedvalue": ""
"depfield": "",
"depfieldvalue": "",
"depopoperator": ""
},
{
"left ": "33.169933319091",
"top": "50.126262664794",
"width": "38.888889312744",
"height": "2.27272725105286",
"esigntype": "3",
"boxid": "3",
"pagenumber": "0",
"font": "Arial",
"fontsize": "10",
"fontcolor": "",
"fieldname": "FullName",
"fieldlabel": "Full Name",
"fielddefaultvalue": "",
"fieldrequired": "0",
"checkedvalue": "",
"uncheckedvalue": ""
"depfield": "",
"depfieldvalue": "",
"depopoperator": ""
}, {
"left ": "51.3071899414063",
"top": "34.9747467041016",
"width": "3.26797389984131",
"height": "2.39898991584778",
"esigntype": "4",
"boxid": "4",
"pagenumber": "0",
"font": "Arial",
"fontsize": "10",
"fontcolor": "",

```

```

    "fieldname": "CheckIt",
    "fieldlabel": "1",
    "fielddefaultvalue": "0",
    "fieldrequired": "0",
    "checkedvalue": "true",
    "uncheckedvalue": "false"
    "depfield": "",
    "depfieldvalue": "",
    "depopoperator": ""
  },
  {
    "left ": "47.222221374511",
    "top": "32.323230743408",
    "width": "2.4509804248809",
    "height": "1.89393937587738",
    "esigntype": "5",
    "boxid": "5",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "10",
    "fontcolor": "",
    "fieldname": "Radio1",
    "fieldlabel": "0",
    "fielddefaultvalue": "0",
    "fieldrequired": "0",
    "checkedvalue": "true",
    "uncheckedvalue": ""
    "depfield": "",
    "depfieldvalue": "",
    "depopoperator": ""
  },
  {
    "left ": "55.882354736328",
    "top": "32.196968078613",
    "width": "2.4509804248809",
    "height": "1.89393937587738",
    "esigntype": "5",
    "boxid": "6",
    "pagenumber": "0",
    "font": "Arial",
    "fontsize": "10",
    "fontcolor": "",
    "fieldname": "Radio1",
    "fieldlabel": "0",
    "fielddefaultvalue": "0",
    "fieldrequired": "0",

```

```
        "checkedvalue": "false",
        "uncheckedvalue": ""
      },
      "depfield": "",
      "depfieldvalue": "",
      "depoperator": ""
    ]
  }
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Doc ID CC546B2E48C3457DBD9E6BA2DE45083D not found"
}
```

POST (No Action Specified)

The POST method receives one or more .SIE files containing document signing information following a successful document signing. Each .SIE file contains the signing information for one signer on one document. The .SIE file is uploaded in an HTTP(S) file transfer. The parameters are passed in the JSON part of the request as described in the table below. For each .SIE file, the signature data is extracted, and the signature images are applied to the document. If all signatures from all signers have been applied, the document is saved in final form, which includes the original unsigned document image, the signed, completed document, an .RBK record containing index data, and all .SIE files containing signing data. The .RBK record is created if one does not already exist. The document is then "locked" by calculating a combined checksum of all the parts, and a stamp is applied to either the first page, or all pages of the document, depending on which option is selected. The eDOCSignature completion stamp contains the Doc ID, the creation date/time, and the lock date/time of the document.

Variable Name:	Description:
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the sign set which was signed.
sendmail	"1" if signer requested a copy of the completed document be emailed to them, "0" if not.
agreementid	Version number of the signing disclosure and agreement, e.g., "12.2.15".
agreementdate	Date/time (in SQL format) that the signer clicked on "I Agree" on the disclosure and agreement page.
files	An array of filenames of the .SIE file(s) to be processed.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSSETS/
JSON:
{
  "session": "0A0F2D1BEAAD40CFA6A21479C5AAD577",
```

```

"host": "72.234.25.54",
"files": ["0A0F2D1BEAAD40CFA6A21479C5AAD577_10FACC54.sie"],
"sendemail": "0",
"agreementid": "12.2.15",
"agreementdate": "2016-04-04 12:03:30",
"signsetid": "10FA2D605468424BA2898AF996833B7C",
"controlid": "CUA123"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "SIE file
0A0F2D1BEAAD40CFA6A21479C5AAD577_10FACC54.sie not found"
}

```

Actions:

Supported actions include: AUTHCODE, CANCEL, DECLINE, EDITSIGNERS, EMAIL, GETDOCUMENTSIGNERSTATUS, GETHANDOFF, HANDOFF, POST, SEARCHDOCS, SENDAUTHCODE, TICKET, UPDATESIGNER.

AUTHCODE

The AUTHCODE action verifies an authentication code. JSON parameters for the request are listed below.

Variable Name:	Description:
action	AUTHCODE
session	The 32-character GUID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the sign set.
authcode	The authentication code to be verified.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "AUTHCODE",
  "controlid": "CUA123",
  "host": "72.245.22.2",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789",
  "authcode": "12345"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{ "result": true }
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "No auth code specified"  
}
```

CANCEL

The CANCEL action cancels a sign set. JSON parameters for the request are listed below.

Variable Name:	Description:
action	CANCEL
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the sign set.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "CANCEL",
  "host": "72.23.456.25",
  "controlid": "CUA123",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789",
  "session": "123ABCD0123456789ABCDEF012345689"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{ "result": true }
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Sign set ABCDEF0123456789ABCDEF0123456789 not  
found"  
}
```

DECLINE

The DECLINE action declines a Sign Set. It accepts a decline reason (entered by the signer) and stores this for each document in the sign set. JSON parameters for the request are listed below.

Variable Name:	Description:
action	DECLINE
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the sign set.
declinereason	Signer's reason for declining – 128-character max.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "DECLINE",
  "controlid": "CUA123",
  "host": "123.23.123.23",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789",
  "declinereason": "Name misspelled on page 3"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{ "result": true }
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Sign set ABCDEF0123456789ABCDEF0123456789 not  
found"  
}
```

EDITSIGNERS

The EDITSIGNERS action updates signer name, email address, and authentication codes. Where appropriate, it sends emails containing a new ticket or authentication code to the current signer email address. JSON parameters for the request are listed below.

Variable Name:	Description:
action	EDITSIGNERS
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signers	<p>An array of update records. Each record is enclosed in double quotes, with seven values separated by semicolons, in the following order:</p> <ul style="list-style-type: none"> • Sign Set ID; • Old Name; • New Name; • Old Email; • New Email; • Old Authentication Code; • New Authentication Code;

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "EDITSIGNERS",
  "controlid": "CUA123",
  "host": "123.54.34.345",
  "session": "DACC57F15FF45AD9BFE2BDB091C8BCF",
  "signers": ["ABCDEF0123456789ABCDEF0123456789;John Does;John J.
Does;john@mymail.com;juser@mymail.com;12345;54321",
"EF012345678CDEF0123459ABCDAB6789;Roger Risk;Roger R.Risk;roger
@mymail.com;rrrisk @mymail.com;2468;1357"]
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Sign set ABCDEF0123456789ABCDEF0123456789 not  
found"  
}
```

EMAIL

The EMAIL action sets a flag in the sign set SQL table so that when the documents in the sign set have been completed, a copy of the documents will be sent to the signer email address. JSON parameters for the request are listed below.

Variable Name:	Description:
action	EMAIL
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the sign set.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "EMAIL",
  "host": "72.23.546.24",
  "controlid": "CUA123",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789"
}

```

Response Parameters:

Variable Name:	Description:
Result	Returns "true" if successful, or "false" if unsuccessful.
Error	The text of the error message. This variable is only returned if result is "false".
Systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Sign set ABCDEF0123456789ABCDEF0123456789 not  
found"  
}
```

GETDOCUMENTSIGNERSTATUS

The GETDOCUMENTSIGNERSTATUS action returns the signing status information for one signer from the specified sign set. JSON parameters for the request are listed below.

Variable Name:	Description:
Action	GETDOCUMENTSIGNERSTATUS
session	The 32-character ID of the current authenticated session. Not required if using handoff below.
handoff	Encrypted handoff string. Not required if using an established session. (See Appendix A)
Host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the package.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/PACKAGES/
JSON:
{
  "action": "GETDOCUMENTSIGNINGSTATUS",
  "handoff": "xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx",
  "controlid": "CUA123",
  "host": "72.54.685.25",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
docid	A 32-character reduced GUID identifying the document.
signerstatus	An array of records enclosed in square brackets, each with 11 named fields as follows: <ul style="list-style-type: none">• docid (32 hex character reduced GUID which identifies the document).• docsigned (an integer value, 0=unsigned; 1=signed; 2=declined).• declinereason (if docsigned=2, the decline reason is included here; otherwise, blank).• signsetid (32 hex character reduced GUID which identifies the signset for each signer).• signsetcreatedon (date signing set was created in MM/DD/YYYY format).• signsetstatus (status of the sign set).• signerid (in format XXXXX-n, where n is the signer number).• signername (the full name of the signer).• signeremail (email address of the signer).• signeraudthcode (authentication code).• signertier (signing order group number).

- Sample successful response JSON:

```
{
  "result": true,
  "signerstatus": [
    {
      "docid": "CC546B2E48C3457DBD9E6BA2DE45083D",
      "docsigned": "1",
      "declinereason": "",
      "signsetid": "B8BD3DF2F1EE3765B8BD3DF2F1EE3765",
```

```
"signsetcreatedon": "05/23/2017",  
"signsetstatus": "signed",  
"signerid": "Signer1",  
"signername": "John Does",  
"signeraudthcode": "1234",  
"signertier": "0"  
}  
]  
}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Authentication failed: timestamp expired."  
}
```

GETHANDOFF

The GETHANDOFF action retrieves the handoff string (ticket) for a specified sign set. JSON parameters for the request are listed below.

Variable Name:	Description:
action	GETHANDOFF
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	32-Character reduced GUID identifying the sign set for the signer/package.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "GETHANDOFF",
  "controlid": "CUA123",
  "host": "123.23.45.67",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
handoff	The encrypted handoff string (ticket) to access the requested signset.

- Sample successful response JSON:

```
{
  "result":true,
  "handoff":"XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX"
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Sign set ABCDEF0123456789ABCDEF0123456789 not found"
}
```

HANDOFF

The HANDOFF action receives an encrypted string (ticket), authenticates it, then establishes a session to be used during document signing. The ticket links to a signer and sign set, and this resource also returns the sign set data, including a list of documents and their status for this signer. JSON parameters for the request are listed below. The handoff and control ID parameters are required.

Variable Name:	Description:
action	HANDOFF
controlid	The institution identifier.
host	IP address of the client machine.
exhandoff	Encrypted handoff string (ticket) for the sign set.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSSETS/
JSON:
{
  "action": "HANDOFF",
  "controlid": "CUA123",
  "exhandoff":
  "DACCA57F15FF45AD9BFE2BDB091C8BCF9Ubm77mMfbvL4d5Rdt8O1LiDN
  PCfTdUq3TpzKNYIwDuButxfebqWG3LVX4mdj3mcLeEhbvVkOT69qK5k5ZQ
  YkAaRZnSbzdwbX3QURjI%2F4TvzyEz7EIAFf8X9FxueX75%2B"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
haspin	Set to "true" or "false". If the signer is required to authenticate using an authentication code set this value to "true".
idcheck	Set to true or false. True if the signer is required to complete out-of-wallet ID verification before signing.
session	The 32-character ID of the active session created by the handoff.
expires	The date that the document will expire and no longer be available to the signer in MM/DD/YYYY format.
sie	If the document has already been signed by this signer, the name of the .SIE file.
pkgid	The 32-character reduced GUID for the package this sign set belongs to.
forcename	Set to true or false. "true" if the signer will be forced to use the full name specified in the sign set.
agreementdate	The date/time the signer agreed to the terms and conditions for electronic signing in MM/DD/YYYY format.
signsetid	The 32-character reduced GUID identifying the sign set.
name	The signer's full name.
email	The signer's email.
docs	An array of information for each document in the sign set. Each row includes three elements: <ul style="list-style-type: none"> • docid (the 32-character reduced GUID identifying the document). • form (the form name). • signed (0=unsigned; 1=signed, 2=declined).

- Sample successful response JSON:

```
{
  "result": true,
  "haspin": false,
  "session": "3960B5509F07410F90D6D843F8AAF870",
  "expires": "07/03/2016",
  "SIE": "FD5CA506B18340309F30160CBBB34309.sie",
  "pkgid": "26F1AF3097D9EA8DB99ADEA573EFB6FC",
  "forcename": "false",
  "agreementdate": "06/01/2016",
  "signsetid": "10FA2D605468424BA2898AF996833B7C",
  "name": "John Does",
  "email": "johndoes@email.com",
  "docs": {
    "CC546B2E48C3457DBD9E6BA2DE45083D":
      {
        "form": "MyForm",
        "signed": 0
      }
  }
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Handoff expired".
}
```

SEARCHDOCS

The SEARCHDOCS action returns a list of documents that meet certain search criteria. It returns two arrays of document information, one for documents to be signed, and the other for "reference only" documents. This is used when a signer enters the signing pages from a "ticket" link to create the list of "Documents to Sign" and "Other Documents". JSON parameters for the request are listed below.

Variable Name:	Description:
action	SEARCHDOCS
controlid	The institution identifier.
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
formname	Search criteria – form name – leave blank for "any form".
search	Search Criteria – signer name or signer email – leave blank for "any signer".
fromdate	Search criteria – Start of date range for document creation date – leave blank if no "created after" value is needed.
todate	Search criteria – End of date range for document creation date – leave blank if no "created before" value is needed.
createby	Search criteria – The username of the user who created the document – leave blank for "created by any user".

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSSETS/
JSON:
{
  "action": "SEARCHDOCS",
  "host": "72.56.45.584",
  "session": "ABCDEF0123456789ABCDEF0123456789",
  "controlid": "CUA123",
  "createdby": "JOEUSER",
```

```

"search": "roger",
"fromdate": "04/01/2017",
"todate": "05/31/2017"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
docs	<p>An array of information for each document (to be signed) in the result set. Each row includes three elements: docid (Doc ID), form (the form name), and signed (0=unsigned; 1=signed). Next is an array "signers" with the following fields for each row:</p> <ul style="list-style-type: none"> • signsetid • packageid • signsetname • status • signerid • signername • signeremail • signerrole • createdby • createdon (mm/dd/yyyy) <p>Finally, an array "otherdocs" with the following fields for each row:</p> <ul style="list-style-type: none"> • docid • packageid • form • signset • signed (0=unsigned; 1=signed)

- Sample successful response JSON:

```
{
  "result": true,
  "docs": [{
    "docid": "CC546B2E48C3457DBD9E6BA2DE45083D",
    "form": "Odometer Disclosure",
    "signed": "0",
    "signers": [{
      "signsetid": "ABCDEF0123456789 ABCDEF0123456789",
      "packageid": "9876543210FEDCBA9876543210FEDCBA",
      "signsetname": "Roger Risk",
      "status": "",
      "signerid": "Signer1",
      "signername": "Roger Risk",
      "signeremail": "rr@mymail.com",
      "signerrole": "1",
      "createdby": "JOEUSER@CUA123",
      "createdon": "4/29/2016"
    }],
    "otherdocs": [{
      "docid": "CC546B2E48C3457DBD9E6BA2DE45083D",
      "packageid": "ABABCD87879898ABABCD87879898",
      "form": "Odometer Disclosure",
      "signset": "B8BD3DF2F1EE3765B8BD3DF2F1EE3765",
      "signed": "0"
    }
  ]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

SENDAUTHCODE

The SENDAUTHCODE action sends the authentication code in an email message to the signer email address. JSON parameters for the request are listed below.

Variable Name:	Description:
action	SENDAUTHCODE
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the signing set (there is one sign set for each signer in each package).

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "SENDAUTHCODE",
  "controlid": "CUA123",
  "host": "123.23.1.23",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{ "result": true }
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Sign Set ABCDEF0123456789ABCDEF0123456789 not  
found"  
}
```

TICKET

The TICKET action sends the secure handoff link ("ticket") for the sign set in a notification based on the selected notification type. JSON parameters for the request are listed below.

Variable Name:	Description:
action	TICKET
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the sign set (there is one sign for each signer in each package).

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "TICKET",
  "controlid": "CUA123",
  "host": "82.25.24.658",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Sign Set ABCDEF0123456789ABCDEF0123456789 not  
found"  
}
```

UPDATESIGNER

The UPDATESIGNER action updates signer information, including name, email address, authentication code, and signing order group (tier). JSON parameters for the request are listed below.

Variable Name:	Description:
action	UPDATESIGNER
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
signsetid	A 32-character reduced GUID identifying the sign set.
signername	The full name of the signer (leave blank if no change).
signeremail	The email address of the signer (leave blank if no change).
authcode	The authentication code (leave blank if no change).
signertier	The signing order group for the signer (leave blank if no change. Use "<BLANK>" value if blanking out a previously non-blank value).
verifyrequired	This variable enables out of wallet authentication. Set to "0" if out of wallet authentication is not desired. Set to "1" if you want the signer to go through out of wallet authentication using IDology. This authentication occurs at the beginning of the signing process. NOTE: Your institution must be configured to use this.
notificationtype	<p>A string representing the notification type to send to this signer.</p> <ul style="list-style-type: none"> • "Public" = Send email message to signer. • "Private" = Send abbreviated email to signer and send message to home banking system via the home banking API. • "No Email" = No notification sent. <p>If notification type is left blank or not included it will default to "Public".</p>
notificationaccount	When notificationtype is set to "Private" this account number is required to identify the customer in the home banking system.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/SIGNSETS/
JSON:
{
  "action": "UPDATESIGNER",
  "controlid": "CUA123",
  "session": "2231F345123456789ABCDEF0123456712",
  "host": "78.548.24.456",
  "signsetid": "ABCDEF0123456789ABCDEF0123456789",
  "signertier": "1",
  "authcode": "<BLANK>",
  "verifyrequired": "-1",
  "notificationtype": "Private",
  "notificationaccount": "2020-0-0"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Sign set ID ABCDEF0123456789ABCDEF0123456789 not found"
}

```

/TEMPLATES

The TEMPLATES resource provides actions to create, store, edit, and retrieve templates for signing forms. Each template contains the background image file and data on the signers, signing elements, and index data fields for the form.

End Points:

/TEMPLATES/

Supported Methods:

POST – Supports various actions as described below. POST without a specified action defaults to the CREATE action.

Actions:

Supported Actions: CREATE, CREATESIGNSETS, DELETE, EDIT, EDITSIGNERS, GETLIST, IMPORT, LINK, REPLACEFORM, SEARCH, TEMPLATEHANDOFF, UPDATE

CREATE

The CREATE action (or POST method with no action specified) will create a template using the uploaded image file and accompanying data. A template is stored in a .DFC file, similar to a signing document. As a minimum, a template must include the background image, one signing element, and one sign set. Signing element data can be passed either as a semicolon separated list of parameters, or as an array of name=value pairs. JSON parameters for CREATE requests include:

Variable Name:	Description:
action	CREATE
session	The 32-hex character ID of the current active session.
controlid	The institution identifier.
host	IP of the client machine.
templatename	The name of the template to be created.
formname	The name of the template to be created if not specified in the templatename parameter.
sigboxes	<p>An array of parameters lists, with values separated by semi-colons, containing 21 parameters in each row, in the following order:</p> <ul style="list-style-type: none"> (0) Signing Element Number – a sequential integer. (1) X – the horizontal position of the element from the left side of the page expressed as a percent of page width (2) Y – the vertical position from the top of the page expressed as a percent of page height. (3) Width – the width of the element expressed as a percent of page width. (4) Height – the height of the element expressed as a percentage of page height. (5) Sig Type – the type of signing element: <ul style="list-style-type: none"> 0 = Signature 1 = Initials 2 = Date 3 = Signer-input text 4 = Check Box 5 = Radio Button 6 = User-input text

	<p>(6) Page – the page number on which the signing element appears</p> <p>(7) Signer Name – (Only used if the signer is always the same) - The full legal name of the signer</p> <p>(8) (Only used if the signer is always the same) - Signer email address</p> <p>(9) (Only used if the signer is always the same) - Authentication Code for the signer</p> <p>(10) Signer ID (e.g., "Signer1", "Signer2", etc. If templates are to be used together in a package, the signer roles must be consistent across all forms in the package.</p> <p>(11) Font Family – used for signing elements with text</p> <p>(12) Font Size – used for signing elements with text</p> <p>(13) Font Color – used for signing elements with text</p> <p>(14) Font weight – not used</p> <p>(15) Field Name – if the field has a value, this is the name that will be used to pass the value in the completed document</p> <p>(16) Field Label – the "caption" used to identify the field on the page</p> <p>(17) Field Default Value – for fields that return a value</p> <p>(18) Required – "1" or "0" – if "1", the field must be clicked before the signing process can be completed.</p> <p>(19) Checked Value – for check boxes and radio buttons – the value returned if checked.</p> <p>(20) Unchecked Value – for check boxes – the value returned if not checked.</p>
signatureboxes	<p>A JSON array of named element lists, including the following parameters:</p> <ul style="list-style-type: none"> • xp – the horizontal position of the element from the left side of the page expressed as a percent of page width • yp – the vertical position from the top of the page expressed as a percent of page height. • wp – the width of the element expressed as a percent of page width. • hp - the height of the element expressed as a percentage of page height. • type – the type of signing element: 0 = Signature 1 = Initials 2 = Date 3 = Signer-input text 4 = Check Box

	<p>5 = Radio Button 6 = User-input text</p> <ul style="list-style-type: none"> • page – the page number on which the signing element appears. • font – used for signing elements with text. • fontsize – used for signing elements with text. • fontcolor – used for signing elements with text. • fieldname – if the field has a value, this is the name that will be used to pass the value in the completed document. • fieldlabel – the “caption” used to identify the field on the page. • fieldvalue – for fields that return a value, this is the initial value. • defaultvalue – for fields that return a value, if no initial value is specified, this is the initial value. • fieldhint – the hint to be displayed if the cursor is placed over the element. • required – “true” or “false” – if true, the field must be “clicked” before the signing process can be completed. Not applicable to fields that have dependencies, and the dependency condition is not met (field is not enabled). • checkedvalue – for check boxes and radio buttons – the value returned if checked. • uncheckedvalue – for check boxes – the value returned if not checked. • depfield – if not blank, the activation of the signing element is dependent on the field value of another signing element (or field). • depfieldvalue – For signing elements with dependencies, this the value that sets the condition. For check boxes and radio buttons, this is “checked” or “unchecked”. • depoperator – for signing elements with dependencies, this is the operator used in the comparison, for example, Accepted=true. Operators can be =, <>, >=, <=, >, <. Defaults to “=” if not specified. • signer - A JSON array of name-value pairs containing role (signer) information. The fields include: <ul style="list-style-type: none"> • signsetid – a 32-hex char reduced GUID for the sign set. Leave blank if a user text field. • role – the name of the role, e.g., “Applicant” or “Co-Applicant”. If templates are to be used together in a package, the signer roles must be consistent across all
--	---

	<p>forms in the package.</p> <ul style="list-style-type: none"> • name – (Only used if the signer is always the same) - The full legal name of the signer. • email (Only used if the signer is always the same) - Signer email address. • authcode (Only used if the signer is always the same) - Authentication Code for the signer. • verifyrequired – “1” or “0”, if “1”, then the signer must complete an out-of-wallet id check before signing. This is done through IDology, and incurs additional costs. • notificationtype – “Public”, “Private”, or “No Email”. “Public” sends regular email messages. “Private” sends abbreviated email messages directing the signer to their home banking site, with notifications inserted into the home banking system (requires integration with core processor). “No Email” sends no emails, so information must be given via phone or in-person, and the “Sign Now” feature must be used to initiate signing. • notificationaccount – If notificationtype is set to “Private”, an account number must be provided to route messages in the home banking system.
--	--

Sample Request:

URI:
 POST .../REST/TEMPLATES/

JSON:

```
{
  "session": "9B818FDC922849798164A8511B6F62A8",
  "host": "172.23.1.78",
  "controlid": "CUA123",
  "formname": "My Form",
  "pkgname": "My Package",
  "pkgid": "1B448D37E570764499AB8476F5F7BA90",
  "signatureboxes": [
    {
      "xp": 31.781045751634,
      "yp": 22.348484848485,
      "wp": 22.467320261438,
      "hp": 2.209595959596,
      "id": "1516914244617",
      "type": 0,
    }
  ]
}
```

```

"page":0,
"docnum":0,
"font":"Arial",
"fontsize":10,
"fontcolor":"black",
"fieldname": "",
"fieldvalue": "",
"fieldlabel": "",
"defaultvalue": "",
"required":"1",
"checkedvalue": "",
"uncheckedvalue": "",
"signer":{
  "signsetid":"59C9B1BDE7164EF695565AEA77CDB6C0",
  "name": "",
  "email": "",
  "authcode": "",
  "role":"Applicant",
  "verifyrequired":"0"
}
},
{
  "xp":56.127450980392,
  "yp":23.042929292929,
  "wp":8.1699346405229,
  "hp":1.2626262626263,
  "id":"1516914247247",
  "type":2,
  "page":0,
  "docnum":0,
  "font":"Arial",
  "fontsize":18,
  "fontcolor":"black",
  "fieldname": "",
  "fieldvalue": "",
  "fieldlabel": "",
  "defaultvalue": "",
  "required":"1",
  "checkedvalue": "",
  "uncheckedvalue": "",
  "depfield": "",
  "depfieldvalue": "",
  "depoperator":"=",

```

```

"signer":{
  "signsetid":"59C9B1BDE7164EF695565AEA77CDB6C0",
  "name": "",
  "email": "",
  "authcode": "",
  "role": "Applicant",
  "verifyrequired": "0"
}
},
{
  "xp": 31.781045751634,
  "yp": 25.252525252525,
  "wp": 22.467320261438,
  "hp": 2.209595959596,
  "id": "1516914254369",
  "type": 0,
  "page": 0,
  "docnum": 0,
  "font": "Arial",
  "fontsize": 10,
  "fontcolor": "black",
  "fieldname": "",
  "fieldvalue": "",
  "fieldlabel": "",
  "defaultvalue": "",
  "required": "1",
  "checkedvalue": "",
  "uncheckedvalue": "",
  "depfield": "",
  "depfieldvalue": "",
  "depoperator": "=",
  "signer": {
    "signsetid": "C2929E5B9F62C845A016D2912AED9E89",
    "name": "",
    "email": "",
    "authcode": "",
    "role": "Co-Applicant",
    "verifyrequired": "0",
    "notificationtype": "",
    "notificationaccount": ""
  }
},
{
  "xp": 56.290849673203,
  "yp": 25.757575757576,

```

```
"wp":8.1699346405229,
"hp":1.2626262626263,
"id":"1516914257659",
"type":2,
"page":0,
"docnum":0,
"font":"Arial",
"fontsize":18,
"fontcolor":"black",
"fieldname":"",
"fieldvalue":"",
"fieldlabel":"",
"defaultvalue":"",
"required":"1",
"checkedvalue":"",
"uncheckedvalue":"",
"depfield":"",
"depfieldvalue":"",
"depoperator":"=",
"signer":{
  "signsetid":"C2929E5B9F62C845A016D2912AED9E89",
  "name":"",
  "email":"",
  "authcode":"",
  "role":"Co-Applicant",
  "verifyrequired":"0",
  "notificationtype":"",
  "notificationaccount":""
}
},
"files":[
  "_5a6a4615a3814.pdf"
]
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message if unsuccessful.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
handoff	The hyperlink to create a document using this template and initiate the signing process.

- Sample successful response JSON:

```
{
  "result":true,
  "handoff":"http://172.23.1.212/eDOCSig/eDOCSig.php?CID=CUA123&TEMPLAT
E=C0FBA727BE4A4410B9248EA4B3C85902ufEWRmCk107Ck9f8slfq97DZP6du
B%2FZBuI7gRIbcumg8SxqcRrBbR50vsKzmLzvVwt6TxooWd1GOYO09orW3fD8u
09dRKt5T2UBuT%2FyGwouqWyRIgvYCxrffH0ooYY6n"
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

CREATESIGNSETS

The CREATESIGNSETS action creates a new document and package from a template and a list of signers. A selected signer email address is also included. Upon creation of the document, a handoff string for that signer will be returned. All signers will receive the usual notifications. JSON parameters for the CREATESIGNSETS request include:

Variable Name:	Description:
action	CREATESIGNSETS
session	The 32-hex character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
docid	The 32-hex character ID of the template.
selectedsigner	The email address of the signer who will sign immediately upon creation of the document.
signers	An array of parameters lists with values separated by semi-colons, containing 3 parameters in each row, in the following order: (0) Signer ID – must match one of the Signer IDs in the template. (1) Signer Name – should be the full legal name of the signer. (2) Signer email.

Sample Request:

URI:

POST .../REST/TEMPLATES/

JSON:

```
{
  "action": " CREATESIGNSETS",
  "session": "75E6FF973ADE49A795AEAF6961E228A3",
  "controlid": "CUA123",
  "host": "127.0.0.1",
  "docid": "F6FF973ADE46961E275E9EA28A3A795A",
```

```

    "selectedsigner": "rr@abc.com",
    "signers":
    [
        "Signer1;Roger Risk;rr@abc.com",
        "Signer2;Steve Danger;sd@abc.com"
    ]
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message if unsuccessful.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
handoff	The signing ticket link for the selected signer.

- Sample successful response JSON:

```

{"result":true,"handoff":"11111111122222222223333333444444444555555566"}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Selected signer not found."
}

```

DELETE

The DELETE action deletes the .DFC template file and associated SQL records. JSON parameters for the request are listed below.

Variable Name:	Description:
action	DELETE
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	A 32-character reduced GUID identifying the template.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/TEMPLATES/
JSON:
{
  "action": "DELETE",
  "controlid": "CUA123",
  "host": "127.0.0.1",
  "session": "F45Dacca57f15fAD9BFE2BDB091C8BCF",
  "docid": "DABCDEF0129A677BC345678EF0145236988E"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result":false,  
  "error":"Server had an error processing the request",  
  "systemerror":"Template ID not found"  
}
```

EDIT

The EDIT action returns the background image file along with signing element and sign set data for the template. If a package ID is included and index data exists for the template in the Pkg_Template_Data SQL table, that index data and package name are also returned. JSON parameters for EDIT requests include:

Variable Name:	Description:
action	EDIT
session	The 32-hex character ID of the current active session.
controlid	The institution identifier.
host	IP of the client machine.
docid	The 32-hex character ID of the template.
pkgid	The 32-hex character ID of the package associated with the document to be created from the template.

Sample Request:

URI:

POST .../REST/TEMPLATES/

JSON:

```
{
  "action": "EDIT",
  "session": "75E6FF973ADE49A795AEAF6961E228A3",
  "controlid": "CUA123",
  "host": "127.0.0.1",
  "docid": "5E67FF973ADE49A795AEAF6961E22A38",
  "pkgid": "AF75E6795AEFF973ADE49A696128A3E2"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message if unsuccessful.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
graphic	The file name of the background image file.
form	The form name of the template.
pkgid	The package ID, if associated with a package.
pkgname	The package name, if associated with a package.
createdby	The user who created the template.
createdon	The creation date/time of the template.
sigboxes	<p>A JSON array of named element lists, including the following parameters:</p> <ul style="list-style-type: none"> • left – the horizontal position of the element from the left side of the page expressed as a percent of page width. • top – the vertical position from the top of the page expressed as a percent of page height. • width – the width of the element expressed as a percent of page width. • height - the height of the element expressed as a percentage of page height. • esigntype – the type of signing element: <ul style="list-style-type: none"> 0 = Signature 1 = Initials 2 = Date 3 = Signer-input text 4 = Check Box 5 = Radio Button 6= User-input text • boxid – a sequential box number. • pagenumber – the page number on which the signing element appears. • font – used for signing elements with text

	<ul style="list-style-type: none"> • fontsize – used for signing elements with text. • fontcolor – used for signing elements with text. • signsetid – the 32-hex character reduced GUID identifying the sign set. • fieldname – if the field has a value, this is the name that will be used to pass the value in the completed document. • fieldlabel – the “caption” used to identify the field on the page. • fieldvalue – for fields that return a value, this is the initial value. • fielddefaultvalue – for fields that return a value, if no initial value is specified, this is the initial value. • fieldrequired – “true” or “false” – if true, the field must be “clicked” before the signing process can be completed. • checkedvalue – for check boxes and radio buttons – the value returned if checked. • uncheckedvalue – for check boxes – the value returned if not checked.
signsets	<p>A JSON array of named element lists, including the following parameters:</p> <ul style="list-style-type: none"> • signsetid – the 32-hex character GUID identifying the sign set. • pkgid - the 32-hex character GUID identifying the package. • signsetname – The signer name. • status – The sign set status, expressed as an integer. Possible values include: Unsigned = '0'; Signed = '1'; Declined = '2'; Canceled = '3'; Reference = '5'; Requested = '6'; • signerid – “Signer1”, “Signer2”, etc. • name – The full legal name of the signer. • email - Signer email address. • role – the signer role, e.g., “Applicant”, “Co-applicant”, etc. • authcode – the authentication code for the signer. • cryptid – the Crypt ID used to create the signing ticket. • createdby – the username of the user who created the sign set.

	<ul style="list-style-type: none"> createdon – the date/time the sign set was created.
fields	Data fields that were passed with the templates if the package was created using the PACKAGE/CREATEFROMTEMPLATES action.

- Sample successful response JSON:

```
{
  "result":true,
  "graphic":"8F8C1423068C4E11B0F7B85427630E3C1A92E97A8F38B10B90.pdf",
  "form":"My Form",
  "pkgid":"AF75E6795AEFF973ADE49A696128A3E2",
  "pkgname":"My Package",
  "createdby":"JOEUSER@CUA123",
  "createdon":"01/25/2018 16:05:02",
  "sigboxes":
  [
    {
      "left":"31.7810459136963","top":"22.3484840393066","width":"22.4673194885254","height":"2.2095959186554","esigntype":"0","boxid":"0","pagenumber":"0","font":"Arial","fontsize":"10","fontcolor":"","signsetid":"6476D31B6A124972A68457ECC60A9295","fieldname":"","fieldvalue":"","fieldlabel":"","fielddefaultvalue":"","fieldrequired":"1","checkedvalue":"","uncheckedvalue":""
    },
    {
      "left":"56.1274528503418","top":"23.0429286956787","width":"8.16993427276611","height":"1.26262629032135","esigntype":"2","boxid":"1","pagenumber":"0","font":"Arial","fontsize":"18","fontcolor":"","signsetid":"6476D31B6A124972A68457ECC60A9295","fieldname":"","fieldvalue":"","fieldlabel":"","fielddefaultvalue":"","fieldrequired":"1","checkedvalue":"","uncheckedvalue":""
    },
    {
      "left":"31.7810459136963","top":"25.2525253295898","width":"22.4673194885254","height":"2.2095959186554","esigntype":"0","boxid":"2","pagenumber":"0","font":"Arial","fontsize":"10","fontcolor":"","signsetid":"31D2D5FF5FF04AA98F24B08DB15AC781","fieldname":"","fieldvalue":"","fieldlabel":"","fielddefaultvalue":"","fieldrequired":"1","checkedvalue":"","uncheckedvalue":""
    },
    {
      "left":"56.2908477783203","top":"25.7575759887695","width":"8.16993427276611","height":"1.26262629032135","esigntype":"2","boxid":"3","pagenumber":"0","font":"Arial","fontsize":"18","fontcolor":"","signsetid":"31D2D5FF5FF04AA98F24B08DB15AC781","fieldname":"","fieldvalue":"","fieldlabel":"","fielddefaultvalue":"","fieldrequired":"1","checkedvalue":"","uncheckedvalue":""
    }
  ]
}
```

```

    }
  ],
  "signsets":
  [
    {"signsetid":"31D2D5FF5FF04AA98F24B08DB15AC781","pkgid":"","signsetname":
    :"","status":"Rdy_Sign","signerid":"18105-1","name":"","email":"","role":"Co-
    Applicant","authcode":"","cryptid":"0303194B7597F654B955C02421C652A0287C
    4C14D5221B99B6DF5774E9E0846B5551","createdby":"JOEUSER@CUA123","c
    reatedon":"01/25/2018"},
    {"signsetid":"6476D31B6A124972A68457ECC60A9295","pkgid":"","signsetname":"
    ","status":"Rdy_Sign","signerid":"18105-
    0","name":"","email":"","role":"Applicant","authcode":"1","cryptid":"0303194B7597F
    654B955C02421C652A0287C4C14D5221B99B6DF5774E9E0846B5551","create
    dby":"JOEUSER@CUA123","createdon":"01/25/2018"}
  ],
  "fields":
  [
    {"First_Name":"Roger"},
    {"Last_Name":"Risk"}
  ]
}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Template ID not found"
}

```

EDITSIGNERS

The EDITSIGNERS action updates the default information for one or more roles (signers) on a template. JSON parameters for the request are listed below:

Variable Name:	Description:
action	EDITSIGNERS
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	A 32-character reduced GUID identifying the template.
signerlist	A JSON array of strings where each string contains eight parameters separated by semi-colons. The values are in the following order: <ul style="list-style-type: none">• SignSetID – the 32-character reduced GUID for the sign set.• Old Role – the current role name.• New Role – the new role name (cannot be blank).• Old Name – the current role default full name (if any).• New Name – the new role default full name (if any).• Old Email – the current role default email address (if any).• New Email – the new role default email address (if any).• New Auth Code – the new role default auth code (if any).

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/TEMPLATES/
JSON:
{
  "action": "EDITSIGNERS",
  "controlid": "CUA123",
  "host": "127.0.0.1",
```

```

    "session": "F45DACCA57F15FAD9BFE2BDB091C8BCF",
    "docid": "DABCDEF0129A677BC345678EF0145236988E",
    "signerlist":
    [
      "A4A39398B05FF4696234875C6876F3DD;Applicant;Applicant;
      Roger Risk;Steve Danger;rr@abc.com;sd@abc.com;1234"
    ]
  }

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```

{"result":true}

```

- Sample unsuccessful response JSON:

```

{
  "result":false,
  "error":"Server had an error processing the request",
  "systemerror":"Edit Signer List Empty"
}

```

GETLIST

The GETLIST action returns a list of templates which have been created for the specified control ID used.

Variable Name:	Description:
action	GETLIST
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/TEMPLATES/
JSON:
{
  "action": "GETLIST",
  "session": "C434E4EB83F74A1DA3DD6D938C7D4D86",
  "host": "172.23.1.78",
  "controlid": "CUA123"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
templates	A JSON array of name-value pairs. The fields include: <ul style="list-style-type: none"> • id – The 32-hex character GUID for the template. • name – the name of the template.

- Sample successful response JSON:

```
{
  "result": true,
  "templates": [
    {
      "id": "0B37DCE683FB4A4A8BDC86B2157CB5FA",
      "name": "Adverse Action Notice"
    },
    {
      "id": "B65B6ECADE1B4ED0B6A96A1EF17B4270",
      "name": "Contract of Sale"
    },
    {
      "id": "831119A5763046EDA13D315F925F4333",
      "name": "SECURITY CONTRACT"
    }
  ]
}
```

- Sample unsuccessful response JSON:

```
{
  "result":false,
  "error":"Server had an error processing the request",
  "systemerror":"Control ID not specified"
}
```

IMPORT

The IMPORT creates a new template from posted data and a .PDF file. The request expects a multipart POST with one part being a .PDF file upload and the other JSON. JSON parameters for the request are listed below. If the .PDF file has fillable fields or signature components, these are converted to static text and/or signing elements. A session is created for the user, and the session ID is returned. This facilitates going directly to the eDOCSignature site to review and edit the template after it has been imported. JSON parameters for the request are listed below:

Variable Name:	Description:
action	IMPORT
session	The 32-character ID of the current authenticated session. Not required if handoff is used.
handoff	An encrypted handoff string (See appendix A). Not required if session is used. If used, a new session will be created, and the session ID will be returned in the JSON response.
host	IP Address of the client machine.
controlid	The institution identifier.
name	Template name.
user	Name of the user creating the template.
mapdata	Array of field names mapping to names found in the .PDF tags.
files	The name of the background image .PDF file enclosed in double quotes and square brackets.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/TEMPLATES/
PDF: Requires PDF
JSON:
{
  "action": "IMPORT",
  "controlid": "CUA123",
  "host": "78.548.24.456",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "user": "JUSER",
```

```

"name": "New Member Application",
"mapdata": {
  "Account": "MemberNumber",
  "Name": "FullName"
},
"files":["ABCDEF0123456789ABCDEF0123456789.pdf"];
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
id	ID of the created template.
session	ID of the session, if created.

- Sample successful response JSON:

```

{
  "result":true,
  "id":"A45D644F54678512C45D644F546785AB",
  "session":"BFDA5FF45AD9E2BCCA57F1DB091C8BCF"
}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "No user specified"
}

```

LINK

The LINK action returns a hyperlink used to create a document from a template and start the signing process for that document. JSON parameters for the request are listed below.

Variable Name:	Description:
action	LINK
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
docid	A 32-character reduced GUID identifying the template.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/TEMPLATES/
JSON:
{
    "session":"B7317EC1D0D044FA84D067754914340F",
    "host":"172.23.1.78",
    "controlid":"CUA123",
    "action":"LINK",
    "docid":"1A92E975542D4227A1BA0A8F38B10B90"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
link	The URL to initiate the creation and signing of a document using the specified template.

- Sample successful response JSON:

```
{
  "result":true,
  "link":"http://172.23.1.212/eDOCSig/eDOCSig.php?CID=CUA123&
  TEMPLATE=C0FBA727BE4A4410B9248EA4B3C85902nY6OmKosvIKhU
  NnvCHBNzGB6usyyV%2FpZfwjjSVBctPc8AeKt7TzDO2Fvu8u41cKGI6GJ
  Pvh4a3fMD%2FWE0zPdT%2Fygaue0Tjg%2FGzfKXe8kejFwXLjpa7zsyH
  1skMD5CqU"
}
```

- Sample unsuccessful response JSON:

```
{
  "result":false,
  "error":"Server had an error processing the request",
  "systemerror":"Template ID not found"
}
```

REPLACEFORM

The REPLACEFORM request is used to replace the background image .PDF file of an existing template. The request expects a multipart POST with one part being a .PDF and the other JSON. JSON parameters for the request are listed below.

Variable Name:	Description:
action	REPLACEFORM
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
templateid	ID of the template to replace the image for.
files	The filename of the new .PDF image, enclosed in double quotes and in square brackets.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/TEMPLATES/
PDF: Requires PDF
JSON:
{
  "action": "REPLACEFORM",
  "controlid": "CUA123",
  "host": "78.548.24.456",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "templateid": "ADCCA57F15FF45AD9BF24BDB09189BBA",
  "files":["ABCDEF0123456789ABCDEF0123456789.pdf"];
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "No image file specified"  
}
```

SEARCH

The SEARCH action returns a list of templates match the given search criteria, which include the creation date, creator/ username, and form name (document type).

Variable Name:	Description:
action	SEARCH
session	The 32-character ID of the current authenticated session.
host	IP Address of the client machine.
controlid	The institution identifier.
search	The form name (document type) of the template.
createdby	The user who created the template.
fromdate	The earliest creation date.
todate	The latest creation date.
orderby	The SQL LIMIT and ORDER BY clause for the search.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/TEMPLATES/
JSON:
{
  "action": "SEARCH",
  "session": "C434E4EB83F74A1DA3DD6D938C7D4D86",
  "host": "172.23.1.78",
  "controlid": "CUA123",
  "createdby": "JOEUSER@CUA123",
  "fromdate": "11/25/2017",
  "todate": "11/30/2017",
  "search": "Loan Application"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
templates	A JSON array of name-value pairs. The fields include: <ul style="list-style-type: none"> • id – The 32-hex character GUID for the template. • name – the name of the template. • created – the created on date of the template in mm/dd/yyyy format.

- Sample successful response JSON:

```
{
  "result": true,
  "templates": [
    {
      "id": "0B37DCE683FB4A4A8BDC86B2157CB5FA",
      "name": "Adverse Action Notice",
      "created": "02/28/2017"
    },
    {
      "id": "831119A5763046EDA13D315F925F4333",
      "name": "SECURITY CONTRACT",
      "created": "08/21/2017"
    }
  ]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Control ID not specified"
}
```

TEMPLATEHANDOFF

The TEMPLATEHANDOFF action returns the document and signer information used to start the signing process for a document defined by the template specified in the handoff. It also creates an active session and returns the session ID.

Variable Name:	Description:
action	TEMPLATEHANDOFF
host	IP Address of the client machine.
controlid	The handoff string for the template.
exhandoff	The form name (document type) of the template.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/TEMPLATES/
JSON:
{
  "action": "TEMPLATEHANDOFF",
  "host": "172.23.1.78",
  "controlid": "CUA123",
  "exhandoff": "XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is "false".
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

session	The 32-hex character string for the active session.
formname	The name of the form (template).
formid	The 32-hex character reduced GUID identifying the template.
signers	<p>A JSON array of name-value pairs containing signer data. The fields include:</p> <ul style="list-style-type: none"> • name – the full name of the signer. • email – the email address of the signer. • role - the signer role, e.g., "Applicant", "Co-applicant", or "Signer1", "Signer2", etc. • authcode – the authentication code for the signer (if any).

- Sample successful response JSON:

```
{
  "result": true,
  "session": "0B37DCE683FB4A4A8BDC86B2157CB5FA",
  "formname": "Loan Application",
  "formid": "E60B374A4A8DC8BD3FBC8C26BB5FA715",
  "signers": [
    {
      "name": "Roger Risk",
      "email": "rr@abc.com",
      "role": "Applicant",
      "authcode": "1234"
    },
    {
      "name": "Steve Danger",
      "email": "sd@abc.com",
      "role": "Co-applicant",
      "authcode": "9876"
    }
  ]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Handoff not specified"
}
```

UPDATE

The UPDATE action will update a The signer and signing element data in a template. Signer and signing element data can be passed either as a semi-colon separated list of parameters, or as an array of name=value pairs. NOTE: Using the semi-colon separated list format is to provide backward compatibility and does not support updating default signer data or field dependencies. The name-value pairs format is the currently supported option. JSON parameters for UPDATE requests include:

Variable Name:	Description:
action	UPDATE
session	The 32-hex character ID of the current active session.
controlid	The institution identifier.
host	The IP address of the client machine.
docid	The 32-hex character GUID for the template to be updated.
sigboxes	<p>An array of parameters lists, with values separated by semi-colons, containing 21 parameters in each row, in the following order:</p> <ul style="list-style-type: none"> (0) Signing Element Number – the element number from the form. (1) X – the horizontal position of the element from the left side of the page expressed as a percent of page width (2) Y – the vertical position from the top of the page expressed as a percent of page height. (3) Width – the width of the element expressed as a percent of page width. (4) Height – the height of the element expressed as a percentage of page height. (5) Sig Type – the type of signing element: <ul style="list-style-type: none"> 0 = Signature 1 = Initials 2 = Date 3 = Signer-input text 4 = Check Box 5 = Radio Button 6 = User-input text (6) Page – the page number on which the signing element appears (7) Signer Name – not used.

	<p>(8) Signer email address – not used.</p> <p>(9) Authentication Code for the signer – not used.</p> <p>(10) Signer ID – not used.</p> <p>(11) Font Family – used for signing elements with text.</p> <p>(12) Font Size – used for signing elements with text.</p> <p>(13) Font Color – used for signing elements with text.</p> <p>(14) Font weight – not used.</p> <p>(15) Field Name – if the field has a value, this is the name that will be used to pass the value in the completed document.</p> <p>(16) Field Label – the “caption” used to identify the field on the page</p> <p>(17) Field Default Value – for fields that return a value</p> <p>(18) Required – “1” or “0” – if “1”, the field must be clicked before the signing process can be completed.</p> <p>(19) Checked Value – for check boxes and radio buttons – the value returned if checked.</p> <p>(20) Unchecked Value – for check boxes – the value returned if not checked.</p>
signatureboxes	<p>A JSON array of named element lists, including the following parameters:</p> <ul style="list-style-type: none"> • xp – the horizontal position of the element from the left side of the page expressed as a percent of page width • yp – the vertical position from the top of the page expressed as a percent of page height. • wp – the width of the element expressed as a percent of page width. • hp - the height of the element expressed as a percentage of page height. • type – the type of signing element: <ul style="list-style-type: none"> 0 = Signature 1 = Initials 2 = Date 3 = Signer-input text 4 = Check Box 5 = Radio Button 7 = User-input text • page – the page number on which the signing element appears • font – used for signing elements with text. • fontsize – used for signing elements with text. • fontcolor – used for signing elements with text. • fieldname – if the field has a value, this is the name

	<p>that will be used to pass the value in the completed document.</p> <ul style="list-style-type: none"> • fieldlabel – the “caption” used to identify the field on the page. • fieldvalue – for fields that return a value, this is the initial value. • defaultvalue – for fields that return a value, if no initial value is specified, this is the initial value. • fieldhint – the hint to be displayed if the cursor is placed over the element. • required – “true” or “false” – if true, the field must be “clicked” before the signing process can be completed. Not applicable to fields that have dependencies, and the dependency condition is not met (field is not enabled). • checkedvalue – for check boxes and radio buttons – the value returned if checked. • uncheckedvalue – for check boxes – the value returned if not checked. • depfield – if not blank, the activation of the signing element is dependent on the field value of another signing element (or field). • depfieldvalue – For signing elements with dependencies, this the value that sets the condition. For check boxes and radio buttons, this is “checked” or “unchecked”. • depoperator – for signing elements with dependencies, this is the operator used in the comparison, for example, Accepted=true. Operators can be =, <>, >=, <=, >, <. Defaults to “=” if not specified. • signer - A JSON array of name-value pairs containing role (signer) information. The fields include: <ul style="list-style-type: none"> ○ signsetid – a 32-hex char reduced GUID for the sign set. Leave blank if a user text field. ○ role – the name of the role, e.g., “Applicant” or “Co-Applicant”. If templates are to be used together in a package, the signer roles must be consistent across all forms in the package. ○ name – (Only used if the signer is always the same) - The full legal name of the signer. ○ email (Only used if the signer is always the same) - Signer email address. ○ authcode (Only used if the signer is always the same) - Authentication Code for the signer. ○ verifyrequired – “1” or “0”, if “1”, then the signer
--	---

	<p>must complete an out-of-wallet id check before signing. This is done through IDology, and incurs additional costs.</p> <ul style="list-style-type: none"> ○ notificationtype – “Public”, “Private”, or “No Email”. “Public” sends regular email messages. “Private” sends abbreviated email messages directing the signer to their home banking site, with notifications inserted into the home banking system (requires integration with core processor). “No Email” sends no emails, so information must be given via phone or in-person, and the “Sign Now” feature must be used to initiate signing. ○ notificationaccount – If notificationtype is set to “Private”, an account number must be provided to route messages in the home banking system.
--	---

Sample Request:

URI:

POST .../REST/TEMPLATES/

JSON:

```
{
  "action": "UPDATE",
  "session": "9B818FDC922849798164A8511B6F62A8",
  "host": "172.23.1.78",
  "controlid": "CUA123",
  "docid": "A89464511B6FDC92289B8187F2A86981",
  "signatureboxes": [
    {
      "xp": 31.781045751634,
      "yp": 22.348484848485,
      "wp": 22.467320261438,
      "hp": 2.209595959596,
      "id": "1516914244617",
      "type": 0,
      "page": 0,
      "docnum": 0,
      "font": "Arial",
      "fontsize": 10,
      "fontcolor": "black",
      "fieldname": "",
      "fieldvalue": ""
    }
  ]
}
```

```

    "fieldlabel":"","
    "defaultvalue":"","
    "required":"1",
    "checkedvalue":"","
    "uncheckedvalue":"","
    "signer":{
      "signsetid":"59C9B1BDE7164EF695565AEA77CDB6C0",
      "name":"","
      "email":"","
      "authcode":"","
      "role":"Applicant",
      "verifyrequired":"0"
    }
  }
]
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message if unsuccessful.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```

{"result":true}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Error creating sig box records."
}

```

/USER_AGREEMENTS

The USER_AGREEMENTS resource manages the text and version data for disclosures and agreements, and the historical data of users' acceptance of those agreements.

End Points:

/USER_AGREEMENTS/

Supported Methods:

POST – Supports various actions as described below.

Actions:

Supported Actions: CREATEAGREEMENTTEXT, CREATEEULATEXT,
GETAGREEMENTTEXT, GETAGREEMENTVERSIONHISTROY, GETEULATEXT,
GETEULAVERSIONHISTORY, GETUSERAGREEMENTHISTORY,
GETUSERAGREEMENTSTATUS, GETUSEREULASTATUS,
UPDATEUSERAGREEMENTSTATUS, UPDATEUSEREULASTATUS

CREATEAGREEMENTTEXT

The CREATEAGREEMENTTEXT action will save the specified version number, date, and text of an agreement. A name for the agreement must also be specified. JSON parameters for CREATEAGREEMENTTEXT requests include:

Variable Name:	Description:
action	CREATEAGREEMENTTEXT
session	The 32-hex character ID of the current active session.
controlid	The institution identifier.
host	IP of the client machine.
agreementname	Name of the agreement – should be consistent for all versions and dates.
agreementversion	Version of the agreement, e.g., 1.2.0.1.
agreementversiondate	The date the agreement became the current version in format mm/dd/yyyy. (Optional) If not specified, the system will use the current date/time.
agreementtext	The text of the agreement. (Hex pairs, encoded)

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": "CREATEAGREEMENTTEXT",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "controlid": "CUA123",
 "host": "187.25.1.564",
 "agreementname": "RDC User Agreement",
 "agreementversion": "1.0.0.0",
 "agreementversiondate": "2016-05-10",
 "agreementtext": "ABCDEF0123456789"
}

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

CREATEEULATEXT

The CREATEEULATEXT action will save the specified version number, date, and text of an agreement. A name for the End User License Agreement (EULA) agreement must also be specified. JSON parameters for CREATEEULATEXT requests include:

Variable Name:	Description:
action	CREATEEULATEXT
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP of the client machine.
eulaname	Name of the agreement – should be consistent for all versions and dates.
eulaversion	Version of the agreement, e.g., 1.2.0.1.
eulaversiondate	The date the agreement became the current version in format mm/dd/yyyy. (Optional) If not specified, will use the current date/time.
eulatext	The text of the agreement. (Hex pairs, encoded)

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": " CREATEEULATEXT",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "controlid": "CUA123",
 "host": "127.23.1.234",
 "eulaname": "RDC User Agreement",
 "eulaversion": "1.0.0.0",
 "eulaversiondate": "2016-05-10",
 "eulatext": "ABCDEF0123456789"
}

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

GETAGREEMENTTEXT

The GETAGREEMENTTEXT action will return the text of an agreement by version number or date. The agreement name must be specified. If no version or date is specified, the text of the most recent version will be returned. If both are specified, only the version number is used. The version number is also returned. JSON parameters for GETAGREEMENTTEXT requests include:

Variable Name:	Description:
action	GETAGREEMENTTEXT
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of client machine
agreementname	Name of the agreement – should be consistent for all versions and dates.
agreementversion	Version of the agreement, e.g., 1.2.0.1. (Optional)
agreementversiondate	The date the agreement became the current version. Only used if no version number is specified. (Optional)

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": "GETAGREEMENTTEXT",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "controlid": "CUA123",
 "host": "72.56.8.54",
 "agreementname": "RDC User Agreement"
}

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
agreementversion	The version of the agreement being returned.
agreementtext	The text of the agreement. (Hex encoded)

- Sample successful response JSON:

```
{
  "result": true,
  "agreementversion": "1.0.0.0",
  "agreementtext":
  "4920756e6465727374616e64206e6f7468696e672e20204920616777265652074
  6f2065766572797468696e672e"
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

GETAGREEMENTVERSIONHISTORY

The GETAGREEMENTVERSIONHISTORY action will return the versions of an agreement. The agreement name must be specified. JSON parameters for GETAGREEMENTVERSIONHISTORY requests include:

Variable Name:	Description:
action	GETAGREEMENTVERSIONHISTORY
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
agreementname	Name of the agreement – should be consistent for all versions and dates.

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": "GETAGREEMENTVERSIONHISTORY",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "controlid": "CUA123",
 "host": "127.0.4.21",
 "agreementname": "RDC User Agreement"
}

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.

error	The text of the error message.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
agreementversions	An array of agreementversion records, each row containing the following named fields: agreementname, agreementversion, agreementversiondate.

- Sample successful response JSON:

```
{
  "result": true,
  "agreementversions": [{
    "agreementname": "RDC User Agreement",
    "agreementversion": "1.0.0.0",
    "agreementversiondate": "2016-05-10"
  },
  {
    "agreementname": "RDC User Agreement",
    "agreementversion": "2.0.0.0",
    "agreementversiondate": "2016-05-11"
  }
  ]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

GETEULATEXT

The GETEULATEXT action will return the text of an agreement by version number or date. The agreement name must be specified. If no version or date is specified, the text of the most recent version will be returned. If both are specified, only the version number is used. The version number is also returned. JSON parameters for GETEULATEXT requests include:

Variable Name:	Description:
action	GETEULATEXT
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
eulaname	Name of the agreement – should be consistent for all versions and dates.
eulaversion	Version of the agreement, e.g., 1.2.0.1. (Optional)
eulaversiondate	The date the agreement became the current version. Only used if no version number is specified. (Optional)

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": "GETAGREEMENTTEXT",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "controlid": "CUA123",
 "host": "125.3.6.52",
 "eulaname": "RDC User Agreement"
}

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. Only returned if result is false.
eulaversion	The version of the agreement being returned.
eulatext	The text of the agreement. (Hex encoded)

- Sample successful response JSON:

```
{
  "result": true,
  "eulaversion": "1.0.0.0",
  "eulatext": "
4920756e6465727374616e64206e6f7468696e672e20204920616772656520746f20657
66572797468696e672e"
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

GETEULAVERSIONHISTORY

The GETEULAVERSIONHISTORY action will return the versions of an agreement. The agreement name must be specified. JSON parameters for GETEULAVERSIONHISTORY requests include:

Variable Name:	Description:
action	GETEULAVERSIONHISTORY
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
eulaname	Name of the agreement – should be consistent for all versions and dates.

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": "GETEULAVERSIONHISTORY",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "controlid": "CUA123",
 "host": "125.3.26.25",
 "eulaname": "RDC User Agreement"
}

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message.

systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
eulaversions	An array of eulaversion records, each row containing the following named fields: <ul style="list-style-type: none"> • eulaname • eulaversion • eulaversiondate

- Sample successful response JSON:

```
{
  "result": true,
  "agreementversions": [{
    "eulaname": "RDC User Agreement ",
    "eulaversion": "1.0.0.0",
    "eulaversiondate": "2016-05-10"
  },
  {
    "eulaname": "RDC User Agreement",
    "eulaversion": "2.0.0.0",
    "eulaversiondate": "2016-05-11"
  }
  ]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

GETUSERAGREEMENTHISTORY

The GETUSERAGREEMENTHISTORY action will return a list of agreements accepted by a specified customer. If the agreement name, is specified, then the list includes only agreements by that name. JSON parameters for GETUSERAGREEMENTHISTORY requests include:

Variable Name:	Description:
action	GETUSERAGREEMENTHISTORY
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
agreementname	Name of the agreement – if included, used as a filter to limit the list contents.
account	The customer account number.

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": " GETUSERAGREEMENTHISTORY",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "host": "127.5.23.21",
 "controlid": "CUA123",
 "account": "2020-0-0"
}

Response Parameters:

Variable Name:	Description:
----------------	--------------

result	Returns "true" if successful or "false" if unsuccessful.
error	Error message text, only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is "false".
agreements	An array of agreement records for the customer account. Each row has name:value pairs, including: <ul style="list-style-type: none"> • agreementname • agreementversion • agreementaccepteddate

- Sample successful response JSON:

```
{
  "result": true,
  "agreements": [{
    "agreementname": "RDC User Agreement",
    "agreementversion": "1.0.0.0",
    "agreementaccepteddate": "05/01/2016"
  },
  {
    "agreementname": "RDC User Agreement",
    "agreementversion": "1.1.0.0",
    "agreementaccepteddate": "05/09/2016"
  }
]
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

GETUSERAGREEMENTSTATUS

The GETUSERAGREEMENTSTATUS action will return the versiontext of an agreement by version number or date. The agreement name must be specified. If no version or date is specified, the text of the most recent version will be returned. If both are specified, only the version number is used. The version number is also returned. JSON parameters for GETUSERAGREEMENTSTATUS requests include:

Variable Name:	Description:
action	GETUSERAGREEMENTSTATUS
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
agreementname	Name of the agreement – should be consistent for all versions and dates.
account	The customer account number.

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": "GETUSERAGREEMENTSTATUS",
 "host": "124.5.26.2",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "controlid": "CUA123",
 "account": "2020-0-0"
}

Response Parameters:

Variable Name:	Description:
----------------	--------------

result	Returns "true" if successful or "false" if unsuccessful.
error	Error message text, only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. Only returned if result is false.
agreementversion	The version of the agreement being returned.
agreementaccepteddate	The date/time the agreement was accepted by the customer.
needsnewagreement	Set value to "true" if the signer needs to accept a new user agreement. This includes if no agreement on file, or the agreement version accepted by the customer is not the most recent version. Setting the value to "false" will not require the signer to accept an agreement.

- Sample successful response JSON:

```
{
  "result": true,
  "controlid": "CUA123",
  "agreementversion": "1.0.0.0",
  "agreementaccepteddate": "05/01/2016",
  "needsnewagreement": false
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

GETUSEREULASTATUS

The GETUSEREULASTATUS action will return the versiontext of an agreement by version number or date. The agreement name must be specified. If no version or date is specified, the text of the most recent version will be returned. If both are specified, only the version number is used. The version number is also returned. JSON parameters for GETUSERAGREEMENTSTATUS requests include:

Variable Name:	Description:
action	GETUSEREULASTATUS
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
eulaname	Name of the agreement – should be consistent for all versions and dates.
account	The customer account number.

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": "GETUSEREULASTATUS",
 "session": "75E6FF973ADE49A795AEAF6961E228A3",
 "controlid": "CUA123",
 "host": "156.2.45.234",
 "account": "2020-0-0"
}

Response Parameters:

Variable Name:	Description:
----------------	--------------

result	Returns "true" if successful or "false" if unsuccessful.
error	Error message text, only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. Only returned if result is false.
agreementversion	The version of the agreement being returned.
agreementaccepteddate	The date/time the agreement was accepted by the customer.
needsnewagreement	Set value to "true" if the signer needs to accept a new user agreement. This includes if no agreement on file, or the agreement version accepted by the customer is not the most recent version. Setting the value to "false" will not require the signer to accept an agreement.

- Sample successful response JSON:

```
{
  "result": true,
  "controlid": "CUA123",
  "host": "56.2.45.231",
  "agreementversion": "1.0.0.0",
  "agreementaccepteddate": "05/01/2016",
  "needsnewagreement": false
}
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

UPDATEUSERAGREEMENTSTATUS

The UPDATEUSERAGREEMENTSTATUS action will set the date/time and version of an agreement that the customer has accepted. JSON parameters for UPDATEUSERAGREEMENTSTATUS requests include:

Variable Name:	Description:
action	UPDATEUSERAGREEMENTSTATUS
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
account	The customer account.
agreementname	Name of the agreement – should be consistent for all versions and dates.
agreementversion	The version of the agreement accepted.
agreementaccepteddate	The date/time when the customer accepted the agreement.

Sample Request:

URI:

```
POST .../REST/USER_AGREEMENTS/
```

JSON:

```
{  
  "action": "UPDATEUSERAGREEMENTSTATUS",  
  "agreementname": "RDC",  
  "session": "11DD991FFC7B43B9BB7E47D7752E4585",  
  "account": "2020-0-0",  
  "controlid": "CUA123",  
  "host": "127.23.56.245",  
  "agreementversion": "1.0.0.0",  
  "agreementaccepteddate": "05/21/2016"  
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	The text of the error message.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is false.

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

UPDATEUSEREULASTATUS

The UPDATEUSEREULASTATUS action will set the date/time and version of an agreement that the customer has accepted. JSON parameters for UPDATEUSEREULASTATUS requests include:

Variable Name:	Description:
action	UPDATEUSEREULASTATUS
session	The 32-character ID of the current active session.
controlid	The institution identifier.
host	IP address of the client machine.
account	The customer account.
eulaname	Name of the agreement – should be consistent for all versions and dates.
eulaversion	The version of the agreement accepted.
eulaaccepteddate	The date/time when the customer accepted the agreement.

Sample Request:

URI:
POST .../REST/USER_AGREEMENTS/

JSON:
{
 "action": "UPDATEUSEREULASTATUS",
 "eulaname": "RDC",
 "session": "11DD991FFC7B43B9BB7E47D7752E4585",
 "account": "2020-0-0",
 "controlid": "CUA123",
 "host": "453.23.25.254",
 "eulaversion": "1.0.0.0",
 "eulaaccepteddate": "05/21/2016"
}

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful or "false" if unsuccessful.
error	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is false.

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

/USERS

The USERS resource retrieves and validates data from the user SQL tables.

End Points:

/USERS/

Methods:

GET – Executes the GETUSERS action described below.

POST – Supports various actions as described below.

Actions:

Supported Actions: ADDUSER, CHECK_EMAIL, DELETEUSER, FORGOT_PASSWORD, GETEDOCITLINK, GET_EMAIL, GETUSERDATA, GETUSERS, UPDATEUSERDATA

ADDUSER

The ADDUSER action adds a new user for the specified control ID in the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	ADDUSER
session	The encrypted handoff string containing a valid time stamp. See Appendix A below.
host	IP Address of the client machine.
controlid	The institution identifier.
username	The name of the user to be added.
description	The description of the user. (Optional)
expiration	The expiration of the user. (Optional)
never_expires	Whether the user ever expires or not. (Optional)
fullname	The full name of the user. (Optional)
email	The user's email address. (Optional)
msg_svc	The name of the user's message service. (Optional)
msg_phone	The phone number of the user's mobile device. (Optional)

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/USERS/
JSON:
{
  "action": "ADDUSER",
  "controlid": "CUA123",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "username": "JUser",
  "host": "156.5.65.52",
  "description": "Test user",
  "expiration": "",
  "never_expires": true,
  "fullname": "Joseph Test User",

```

```
"email": "JOEUSER@CUA123",  
"msg_svc": "",  
"msg_phone": "8001234567"  
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is false.

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

CHECK_EMAIL

The CHECK_EMAIL action checks to see if an email address is valid and unique within the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	CHECK_EMAIL
handoff	The encrypted handoff string containing a valid time stamp. (See Appendix A below)
controlid	The institution identifier.
host	IP address of the client machine.
username	The username for the user that uses the email address.
email	The email address to be verified.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/USERS/
JSON:
{
  "action": "CHECK_EMAIL",
  "controlid": "CUA123",
  "host": "156.25.24.3",
  "handoff": "DACCA57F15FF45AD9BFE2BDB091C8BCFCA57F15FF45AD9",
  "username": "JOEUSER@CUA123",
  "email": "juser@mycorp.com"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is false.
emailunique	Returns "true" if unique, or "false" if not.

- Sample successful response JSON:

```
{"result":true,"emailunique":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

DELETEUSER

The DELETEUSER action deletes a specified user for the specified control ID in the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	DELETEUSER
session	The encrypted handoff string containing a valid time stamp. (See Appendix A below)
host	IP Address of the client machine.
controlid	The institution identifier.
username	The name of the user to be deleted.

Sample Request:

```

METHOD: POST/DELETE
URI: https://eDSserver/ISAPI/RIP.dll/REST/USERS/
JSON:
{
  "action": "DELETEUSER",
  "controlid": "CUA123",
  "host": "123.54.56.5",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "username": "JUser"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. This variable is only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is false.

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

FORGOT_PASSWORD

The FORGOT_PASSWORD action sends a link to the specified user's email to retrieve the password for the specified control ID in the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	FORGOT_PASSWORD
controlid	The institution identifier.
host	IP Address of the client machine.
username	The name of the user to be added.

Sample Request:

```
METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/USERS/
JSON:
{
  "action": "FORGOT_PASSWORD",
  "controlid": "CUA123",
  "host": "156.25.23.245",
  "username": "JUser"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. Only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. This variable is only returned if result is false.

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

GETEDOCITLINK

The GETEDOCITLINK action sends a link to the user for the specified Control ID in the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	GETEDOCITLINK
session	The encrypted handoff string containing a valid time stamp. (See Appendix A below)
host	IP Address of the client machine.
controlid	The institution identifier.
username	The name of the user.
email	The user's email address.

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/USERS/
JSON:
{
  "action": "GETEDOCITLINK",
  "controlid": "CUA123",
  "host": "156.23.24.2",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "username": "JUser",
  "email": "JOEUSER@CUA123"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
handoff	Encrypted handoff for link.
error	The text of the error message. Only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. Only returned if result is false.

- Sample successful response JSON:

```
{  
  "result": true,  
  "handoff": "DACCA57F15FF45AD9BFE2BDB091C8BCFCA57F15FF45AD9"  
}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

GET_EMAIL

The GET_EMAIL action retrieves the email address and full name for a specified username. JSON parameters for the request are listed below.

Variable Name:	Description:
action	GET_EMAIL
handoff	The encrypted handoff string containing a valid time stamp. (See Appendix A below)
controlid	The institution identifier.
host	IP address of the client machine.
username	The username.

Sample Request:

```

METHOD: POST/GET
URI: https://eDSserver/ISAPI/RIP.dll/REST/USERS/
JSON:
{
  "action": "GET_EMAIL",
  "controlid": "CUA123",
  "host": "156.2.23.24",
  "handoff": "DACCA57F15FF45AD9BFE2BDB091C8BCFCA57F15FF45AD9",
  "username": "JOEUSER@CUA123"
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. Only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. Only returned if result is false.
email	The email address of the user.
fullname	The full name of the user.

- Sample successful response JSON:

```
{  
  "result": true,  
  "email": "juser@mycorp.com",  
  "fullname": "Joe User"  
}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "Invalid Session"  
}
```

GETUSERDATA

The GETUSERDATA action retrieves the user data for the specified user and control ID in the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	GETUSERDATA
session	The encrypted handoff string containing a valid time stamp. (See Appendix A below)
host	IP Address of the client machine.
controlid	The institution identifier.
username	The name of the user to be added.
includeavailablegroups	Set value to "true" or "false". If "true", a JSON array of available groups will be returned. If false, no data will be returned for this value.
includeavailablepermissions	Set value to "true" or "false". If "true", a JSON array of available permissions will be returned. If false, no data will be returned for this value.
includeallowedpermissions	Set value to "true" or "false". If "true", a JSON array of permissions allowed for the user will be returned. If false, no data will be returned for this value.
includeeffectivepermissions	Set value to "true" or "false". If "true", a JSON array of effective permissions for the user will be returned. Effective permissions include any permissions inherited from the user's group memberships plus any permissions specifically allowed for the user. If false, no data will be returned for this value.

Sample Request:

```

METHOD: POST/GET
URI: https://eDSserver/ISAPI/RIP.dll/REST/USERS/
JSON:
{
  "action": "GETUSERDATA",
  "session": "980B458F457F41A8B215C3CBE5C0C918",
  "controlid": "CUA123",

```

```

"host": "127.0.0.1",
"username": "JOEUSER@CUA123",
"includeavailablegroups": false,
"includedeniedpermissions": false,
"includeallowedpermissions": true,
"includeeffectivepermissions": true
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. Only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. Only returned if result is false.
controlid	The institution identifier.
userid	The 32-hex character reduced GUID for the user.
username	The name of the user to be added.
description	The description of the user.
expiration	The expiration of the user password. Not used if never_expires is "true".
forcechange	Set value to "true" or "false". If "true", the user should be forced to change their password.
neverexpires	Set value to "true" or "false". If "true", the user password never expires.
lockedout	Set value to "true" or "false". If "true", the user cannot log in.
fullname	The full name of the user. Used when sending emails.
email	The user's email address. Used in admin screens and when sending emails.
msg_svc	The name of the user's message service. Not currently used.
msg_phone	The phone number of the user's mobile device. Not currently used.
availablepermissions	A JSON array of name-value pairs containing available permissions. Available permissions are limited to those permissions which the current user has (you must have a

	<p>permission to assign it to another user). Each row contains the following parameters:</p> <ul style="list-style-type: none"> • permid – the 32-hex character GUID of the permission. • permname – the label (common name) of the permission.
availablegroups	<p>A JSON array of name-value pairs containing available groups. Each row contains the following parameters:</p> <ul style="list-style-type: none"> • groupid – the 32-hex character reduced GUID identifying the group. • groupname – the name of the group.
allowedpermissions	<p>A JSON array of name-value pairs containing permissions specifically granted to the user. Each row contains the following parameters:</p> <ul style="list-style-type: none"> • permid – the 32-hex character GUID of the permission. • permname – the label (common name) of the permission.
groupmemberships	<p>A JSON array of name-value pairs containing groups that the user is a member of. Each row contains the following parameters:</p> <ul style="list-style-type: none"> • groupid – the 32-hex character reduced GUID identifying the group. • groupname – the name of the group.
effectivepermissions	<p>A JSON array containing the name of effective permissions of the user. Effective permissions include any permissions inherited from the user's group memberships plus any permissions specifically allowed for the user.</p>

- Sample successful response JSON:

```
{
  "result": true,
  "userid": "F4F9B3A4553B92368F2DA613933DD1FD",
  "username": "JOEUSER@CUA123",
  "description": "Created from secure handoff",
  "expiration": "2018-12-26 00:00:00",
  "controlid": "CUA123",
  "forcechange": "False",
  "neverexpires": "True",
  "lockedout": "False",
  "fullname": "Joe User",
  "email": "joeuser@cua123.org",
  "msgservice": "",
  "msgphone": "",
  "allowedpermissions":
```

```

[
  {
    "permid": "EC45AB4B6787D49EDDBA36E6238C76CA",
    "permname": "ProDOC Edit All Packages"
  }
],
"groupmemberships":
[
  {
    "groupid": "17588597EF6FC5BD45EFE848091983D4",
    "groupname": "EDOCSIG_CUA123",
    "description": "Group"
  }
],
"effectivepermissions":
[
  "eDOCSig Manage Documents",
  "eDOCSig Send Document",
  "ProDOC Edit All Packages"
]
}

```

- Sample unsuccessful response JSON:

```

{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}

```

GETUSERS

The GETUSERS action retrieves a list of usernames and full names for the specified control ID in the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	GETUSERS
handoff	The encrypted handoff string containing a valid time stamp. (See Appendix A below)
controlid	The institution identifier.
host	IP address of the client machine.
requiredpermission	A permission the user must have to execute this action.

Sample Request:

METHOD: POST/GET

URI: <https://eDSserver/ISAPI/RIP.dll/REST/USERS/>

JSON:

```
{
  "action": "GET_EMAIL",
  "controlid": "CUA123",
  "host": "192.35.45.265",
  "session": "DACCA57F15FF45AD9BFE2BDB091C8BCF",
  "requiredpermission": "Edit All Packages"
}
```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. Only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. (Only returned if result is false.)
users	An array of user data, each row contains the name-values for username and fullname.

- Sample successful response JSON:

```
{
  "result": true,
  "users": [{
    "username": "JOEUSER@CUA123",
    "fullname": "Joe User"
  },
  {
    "username": "JANEUSER@CUA123",
    "fullname": "Jane User"
  }
]
```

- Sample unsuccessful response JSON:

```
{
  "result": false,
  "error": "Server had an error processing the request",
  "systemerror": "Invalid Session"
}
```

UPDATEUSERDATA

The UPDATEUSERDATA action updates the data specified for a specific user and for the specified control ID in the eDOCSignature system. JSON parameters for the request are listed below.

Variable Name:	Description:
action	UPDATEUSERDATA
session	The 32-hex character reduced GUID identifying an active session.
host	IP Address of the client machine.
controlid	The institution identifier.
userid	The 32-hex character reduced GUID identifying the user to be updated.
assignedcontrolid	The control ID that the user is assigned to (if blank, the user is global and can operate in any control ID they have permissions in).
description	The description of the user (no change if blank or not included).
password	The user's password (no change if blank or not included).
expiration	The expiration date of the user's password (no change if blank or not included).
neverexpires	Set value to "true" or "false". If "true", the expiration date will be ignored and the user's password will never expire (no change if blank or not included).
forcechange	Set value to "true" or "false". If "true", the user should be forced to change their password the next time they log in (no change if blank or not included).
lockedout	Set value to "true" or "false". If "true", the user will not be allowed to log in (no change if blank or not included).
fullname	The full name of the user (no change if blank or not included).
email	The user's email address (no change if blank or not included).
msg_svc	The name of the user's message service (no change if blank or not included).

msg_phone	The phone number of the user's mobile device (no change if blank or not included).
groupmemberships	A JSON array of group names that the user is a member of.
allowed	A JSON array of permission names that are specifically granted to the user. Does not include permissions inherited from group memberships. (See Appendix C for permission names).

Sample Request:

```

METHOD: POST
URI: https://eDSserver/ISAPI/RIP.dll/REST/USERS/
JSON:
{
  "action":"UPDATEUSERDATA",
  "session":"773E456022204CB6AA7F0F92820F446D",
  "host": "127.0.0.1"
  "controlid":"CUA123",
  "userid":"E3AEC4D16B6B4BB297D756E6130C6D35",
  "email":"js@mymail.com",
  "fullname":"Jack J. Sprat",
  "description":"Created from secure handoff",
  "password":"",
  "expiration":"05/31/2018",
  "forcechange":false,
  "lockedout":false,
  "assignedcontrolid":"CUA123",
  "groupmemberships":
  [
    "EDOC SIG_CUA123"
  ],
  "allowed":
  [
    "eDOCSig Send Document",
    "eDOCSig Manage Documents",
    "eDOCSig Setup"
  ]
}

```

Response Parameters:

Variable Name:	Description:
result	Returns "true" if successful, or "false" if unsuccessful.
error	The text of the error message. Only returned if result is false.
systemerror	Error message with additional system information, intended for internal use or API troubleshooting. Only returned if result is false.

- Sample successful response JSON:

```
{"result":true}
```

- Sample unsuccessful response JSON:

```
{  
  "result": false,  
  "error": "Server had an error processing the request",  
  "systemerror": "User not found"  
}
```

Appendix A: Encrypted Handoff Strings

The handoff string is encrypted using a shared secret key, and successful decryption and verification of an unexpired timestamp constitutes authentication for the client request.

The format of the **TIMESTAMP** is: dd = two-digit day, mm = two-digit month, yy = two-digit year, hh = two-digit hour (24-hour clock), and nn = two-digit minute, all separated by the forward slash (“/”) character. The allowable “window” of time the handoff is valid can be specified, as can any difference in time zone between the client and the server.

Encryption Types can include DES or Triple DES with either ECE or CBC chaining, with or without the initialization vector included. Padding is typically PK35S but can also be space or null padding. Triple DES can use either 2-Key (32 hex characters) or 3-Key (48 hex characters) encryption.

If the encrypted string is being used to start a session, it must also contain a username. The **TIMESTAMP** and **USER** arguments in the unencrypted string are joined using the “&” character. In the following example, the user is **JOEUSER** and the call is being made at 10:45 on December 3, 2016:

```
TIMESTAMP=03/12/16/10/45&USER=JOEUSER
```

This string would then be encrypted with the selected encryption parameters, output in hex format and passed as the “handoff” parameter. When doing a secure handoff, the Control ID and IP address of the client machine making the call must also be passed in the calling parameters, as shown in the following example:

```
{  
...  
“controlid”:”CUA123”,  
“host”:”127.0.0.1”,  
“handoff”:”XXXXXXXXXXXXXXXXXXXX<Encrypted hex string>XXXXXXXXXXXXXXXXXXXX”,  
...  
}
```

Appendix B: Notification Messages

There are three notification options in eDOCSignature: public, private, and none. Public notifications consist of email messages sent to the signer. These typically contain the hyperlinks used as “tickets” to go to the eDOCSignature signing pages, the authentication codes needed to complete the signing process, and the various status notifications about the signing process.

Private notifications have two sets of messages: the first correspond roughly to the public messages, but instead of containing the actual links or information, refer the signer to their home banking web site. Once logged into the home banking web site, the signer can view the messages that have the full information, which have been transmitted to the home banking system through its message submission API. The messages are in HTML or text format and can be customized for each institution. The standard file names and descriptions for each message type are in the tables in the following pages.

Notifications may have replaceable text tags in the subject and body. These tags allow the message to contain specific signer, user, document, or package information. The content of each tag is listed on the following page.

Text Replacement Tag Values

%AUTHCODE% - The authentication code for the signer.

%ENVELOPESUBJECT% - The “Envelope Subject” value for ProDOC Packages.

%FORMNAME% - The form name or document type, e.g., “Loan Application”

%FROMEMAIL% - The “sender” email address – it may be that of the owner/user or an institution (specified in the RAP.ini file), if a user email is not available, or if the option to use the alternate email is selected.

%FROMNAME% - The email “sender” name – it may be the full name of an owner/user or an institution (specified in the RAP.ini file) name, if a user full name is not available, or if the option to use the alternate name is selected.

%LINK% - The hyperlink for a signer to view or sign a document.

%NAME% - The name of the person the email is being sent to. For user emails, this is the full name of the user. For signer emails, this is the full name of the signer.

%PACKAGENAME% - The name of the package.

%POST_TEXT% - The optional text inserted after the standard body of the ticket message.

%PRE_TEXT% - The optional text inserted prior to the standard body of the ticket message.

%SIGNERNAME% - The full name of the signer on the document.

%SPLASHNAME% - The name of the institution, e.g., ABC Credit Union.

%TICKET% - The hyperlink for a signer to view or sign a document.

%URL% - The hyperlink to initiate signing using a template

%USERNAME% - The system username of the owner/user, e.g., USER@CUA123

User Email Messages

File Name	Purpose	Sample Extract	Tags
NoticeCompleted_User.email	Notice that document has been completed	All signers have signed...	%ENVELOPESUBJECT% %FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SIGNERNAME% %SPLASHNAME% %TICKET% %USERNAME%
NoticeCancelled.email	Notice that document was canceled.	The document has been canceled. Please sign in to home banking...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SIGNERNAME% %SPLASHNAME% %TICKET% %USERNAME%
NoticeClosed.email	Notice that document has been closed	The document has been closed. Please sign in to home banking to view...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SPLASHNAME% %TICKET% %USERNAME%
NoticeDeclined_User.email	Notice that a user has declined to sign a document	John Doe has declined to sign...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SIGNERNAME% %SPLASHNAME% %TICKET%

			%USERNAME%
NoticePkgClosed.Email	Notice that a package has been closed	The John Doe Loan Application has been closed.	%ENVELOPESUBJECT% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SPLASHNAME% %TICKET% %USERNAME%
NoticeSigned_User.email	Notice that document was signed by a specific signer	John Doe has signed...	%ENVELOPESUBJECT% %FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SIGNERNAME% %SPLASHNAME% %TICKET% %USERNAME%
Template.email	Transmit a "secure document" link to a user.	The link below can be used for signers to create and sign a document using your template...	%FORMNAME% %FROMEMAIL% %FROMNAME% %NAME% %URL%
SentTo.email	Send a signed document to a specified email	Here is the document you requested...	%FORMNAME% %FROMEMAIL% %FROMNAME% %SPLAHSNAME% %USERNAME%

Public Signer Email Messages

File Name	Purpose	Sample Extract	Tags
AuthCode.email	Tell signer that an authcode is available in home banking	A document is ready to sign. Please sign in to home banking...	%AUTHCODE% %FROMEMAIL% %FROMNAME% %NAME% %SPLAHSNAME%
NoticeCancelled.email	Notice that document was canceled.	The document has been canceled. Please sign in to home banking...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SIGNERNAME% %SPLASHNAME% %TICKET% %USERNAME%
NoticeClosed.email	Notice that document has been closed	The document has been closed. Please sign in to home banking to view...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SPLASHNAME% %TICKET%
NoticeCompleted.email	Notice that document has been completed	All signers have signed the document. Please sign in to home banking to view...	%ENVELOPESUBJECT% %FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SIGNERNAME% %SPLASHNAME% %TICKET%
NoticeDeclined.email	Notice that document has been declined by a signer	A signer has declined to sign your document. Please sign in to home banking to	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SIGNERNAME% %SPLASHNAME%

		view...	%TICKET%
NoticePkgClosed.Email	Notice that a package has been closed (partially signed)	The Loan Package has been closed.	%ENVELOPESUBJECT% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SPLASHNAME% %TICKET% %USERNAME%
NoticeSigned.email	Notice that document was signed by a specific signer	A document has been signed. Please sign in to home banking to view...	%ENVELOPESUBJECT% %FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SIGNERNAME% %SPLASHNAME% %TICKET%
Ticket.email	Tell signer that a hyperlink (ticket) for signing or viewing a document is available in home banking	A document is ready to sign. Please sign in to home banking...	%AUTHCODE% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %POST_TEXT% %PRE_TEXT% %TICKET% %SIGNERNAME% %SPLAHSNAME%

Private Signer Email Messages

File Name	Purpose	Sample Extract	Tags
PrivAuthCode.email	Send an authentication code to a signer	Please enter this code when prompted...	%AUTHCODE% %FROMEMAIL% %FROMNAME% %NAME% %SPLAHSNAME%
PrivDocCancelled.email	Notice that document was canceled.	The Loan Application has been canceled...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SIGNERNAME% %SPLASHNAME% %TICKET% %USERNAME%
PrivDocClosed.email	Notice that document has been closed	Your Loan Application has been closed...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SPLASHNAME% %TICKET%
PrivDocCompleted.email	Notice that document has been completed	All signers have signed the Loan Application...	%ENVELOPESUBJECT% %FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SIGNERNAME% %SPLASHNAME% %TICKET%
PrivDocDeclined.email	Notice that document has been declined by a signer	John Doe has declined to sign the Loan Application...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SIGNERNAME% %SPLASHNAME%

			%TICKET%
PrivPkgClosed.email	Notice that a package has been closed (partially signed)	The Loan Package has been closed.	%ENVELOPESUBJECT% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SPLASHNAME% %TICKET% %USERNAME%
Signed.email	Notice that document was signed by a specific signer	John Doe has signed the Loan Application...	%ENVELOPESUBJECT% %FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SIGNERNAME% %SPLASHNAME% %TICKET%
Ticket.email	Transmit a hyperlink (ticket) for signing or viewing a document to a signer.	Click on this link to review and sign the Loan Application...	%AUTHCODE% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %POST_TEXT% %PRE_TEXT% %TICKET% %SIGNERNAME% %SPLAHSNAME%

Private Home Banking Text Messages

NOTE: APITicket.txt can be used to give both ticket and authentication code in a single message.

File Name	Purpose	Sample Extract	Tags
APIAuthCode.txt	Send an authentication code to a signer	Please enter this code when prompted...	%AUTHCODE% %FROMEMAIL% %FROMNAME% %NAME% %SPLAHSNAME%
APIDocCanceled.txt	Notice that document was canceled	The Loan Application has been canceled.	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SIGNERNAME% %SPLASHNAME% %TICKET% %USERNAME%
APIDocClosed.txt	Notice that a document has been closed	The Loan Application has been closed. Click this link to view...	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SPLASHNAME% %TICKET%
APIDocCompleted.txt	Notice that document has been completed	The Loan Application has been signed by all signers. Click this link to view...	%ENVELOPESUBJECT% %FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SIGNERNAME% %SPLASHNAME%

			%TICKET%
APIDocDeclined.txt	Notice that a signer has declined to sign a document	John Doe has declined to sign the Loan Application	%FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %SIGNERNAME% %SPLASHNAME% %TICKET%
APIPkgClosed.txt	Notice that a package has been closed (partially signed)	Joe User has closed the John Doe Auto Loan Package.	%ENVELOPESUBJECT% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SPLASHNAME% %TICKET% %USERNAME%
APIDocSigned.txt	Notice that document was signed by a specific signer	John Doe has signed your Loan Application. Click this link to view...	%ENVELOPESUBJECT% %FORMNAME% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %PACKAGENAME% %SIGNERNAME% %SPLASHNAME% %TICKET%
Ticket.txt	Give a signer the hyperlink (ticket) for signing or viewing a document	The Loan Application is ready to sign. Please click this link to review and sign...	%AUTHCODE% %FROMEMAIL% %FROMNAME% %LINK% %NAME% %POST_TEXT% %PRE_TEXT% %TICKET% %SIGNERNAME% %SPLAHSNAME%

Appendix C: eDOCSignature Permissions

The following is a list of permissions currently implemented in eDOCSignature. When updating permissions for a user, the name of the permission must match the string in the Value column exactly (case sensitive).

Suggested Label	Value	Details
Change Settings	eDOCSig Setup	Allow user to change eDOCSignature settings
Send Documents	eDOCSig Send Document	Allow user to create and send a document for signing
Manage Documents	eDOCSig Manage Documents	Allow user to edit or delete an existing document
View All Packages	ProDOC Edit All Packages	Allow user to manage documents/packages from other users
Edit Users	Edit Users	Allow user to manage users
Edit Groups	Edit Groups	Allow user to manage groups
Edit Disclosure	Edit User Agreements	Allow user to edit the institution user agreement

eDOC INNOVATIONS



empowering people
to perform digital transactions
in a mobile environment (mDTM)

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