

SIGNiX

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Removing Signers via API

Branch w/ POC

Utopia: [GBSignixDeleteSignerAndFiledPOC](#)

Removing signers via the API had several issues

- Required that we populate the signer with a valid email
 - this is weird because after creating the transaction we are immediately removing them
- The fields for that user were still showing up, but they could be ignored, deleted (sometimes), or assigned to another signer.

Details from SIGNiX

We did find a way for you to do this with an AJAX call. If you know the ID of the signer (ie: P01, P02 usually the order of the parties in the transaction), you can make the attached call (substitute in DocSetID for the id and ofc, your credentials) to drop all of a user's tasks from a transaction and then drop that party out of the transaction.

Let us know if you have any questions.

TRANSACTION_SAVEDeltas: Transaction_DropRole, DropAllTask

```
<?xml version="1.0" encoding="UTF-8"?>
<SubmitAjaxRq xmlns="urn:com:signix:schema:sdddc-1-1">
  <CustInfo>
    <Sponsor>SUB</Sponsor>
    <Client>SUB</Client>
    <UserId>SUB</UserId>
    <Pswd>SUB</Pswd>
  </CustInfo>
  <Data>
    <DocumentSetID>SUB</DocumentSetID>
    <Request>{"objectType":"Transaction_SaveDeltas","id":"SUB
DocSetID","deltas":[{"objectType":"Transaction_DropAllTask","roleID":"P02"}, {"objectType":"Transaction_DropRole","id":"P02"}]}</Request>
  </Data>
```

Alternative Approach

This is more than likely the approach we will end up taking.

You can just not send MemberInfo for a template signer, and you will get the same behavior as making the above API calls, but you don't have to populate a fake signer email just so you can remove the, but you will still have unassigned fields that show (but again, they can be ignored, deleted, or assigned to others signers).

Sequential Signing

WorkflowOrder

The memberInfo (essentially the signer details) object has a workflowOrder property. This is a number that indicates the order in which signers receive emails to sign. If the workflowOrder is the same for multiple users, they will receive their email to sign at the same time. Signers will not receive their email to sign until all signers with a lower workflow order have signed.

Showing the Signers Tab in SIGNiX iframe

AllowParticipantEditing

When making GetAccessLink request, there is a property called AllowParticipantEditing. This needs to be set to **Yes**.

While this would allow users to see the Signers tab, and thus, remove signers manually, it will also have some side effects, if users decide to remove signers we don't expect or don't remove signers we expect them to remove. For example, we have notifications in Revver to let users know they have a document to sign, and if the signer were removed, they would have a notification even though they aren't even a signer. This would be a problem though for anything that links the signix signer to a role in Revver.