keepit

Coverage details

docusign



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Envelopes

Backup

- Received envelopes aren’t backed up.
- Only envelopes available to the user who authorized the connector are included. This covers envelopes that user sent and envelopes available through Shared Access in Docusign.
- Completed envelopes include their own audit certificate, ensuring the full history of the agreement is preserved.
- Metadata is available for reference or archival compliance.

Restore

- Envelopes can’t be restored. This limitation comes from the design of the Docusign platform and API. Once an envelope is sent, it enters a legally binding signature workflow. Docusign doesn’t allow envelopes to be reinserted into this workflow or reverted to a previous state. Restoring an envelope would require restarting the entire signing process, which would undermine the original timeline, sequence, and compliance integrity of the agreement.

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Templates

Backup

- Password-protected templates aren’t backed up.

Restore

- Only whole templates can be restored, not parts of a template.
- A workflow or document that exists only in Docusign isn’t removed during restore.

Permission profiles

Restore

- If a permission profile with the same name already exists in Docusign, the restored profile is created with “(Restored)” added to its name.

- If you restore the same profile several times, the suffix can be repeated.

Users

Restore

- If a user’s permission profile was deleted from Docusign, the user is restored without it. To keep this connection, restore the permission profile as well.

- If a user’s group was deleted from Docusign, the user is restored without that group membership. Missing memberships are reported after the restore.

User groups

Backup

- The “Everyone” group isn’t backed up.

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Restore

- The “Administrators” group is backed up but can’t be restored.
- Single group members can’t be restored on their own. Selecting a member opens the user’s folder, so restore the user instead.

Signing groups

Restore

- A signing group can have up to 200 members. If a restore reaches this limit, the remaining members aren’t added. The logs list the missing members.

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