

Cogneris Administrator Manual

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Contents

1. START HERE
 - i. [Start here](#)
2. TENANT ADMINISTRATION
 - i. [Manage members and profiles](#)
3. PORTAL
 - i. [Portal journey languages](#)
4. WORKFLOW
 - i. [Workflow administration overview](#)
 - ii. [Design and publish a workflow](#)
 - iii. [Organize human review](#)
 - iv. [Validate digital signatures](#)
 - v. [Connect your systems](#)
 - vi. [Workflow administration screens](#)
5. DOCUMENT CENTER
 - i. [Document Center administration overview](#)
 - ii. [Triage the Inbox](#)
 - iii. [Follow a process](#)
 - iv. [Organize and share documents](#)
 - v. [Search documents](#)
 - vi. [Document Center administration screens](#)

Start here

This manual is for the people who **set up and run Cogneris for their company**: company administrators and technical profiles. It explains how to configure each product — members and profiles, the languages of a Portal journey, workflows and their phases, connections to your systems, review queues and the Document Center — and what every setting does.

Day-to-day use of the products — sending an access link, reviewing a document, signing, finding a document — is in the [user manual](#). Shared topics such as sign-in, multi-factor authentication and billing are described there once and are not repeated here.

Parts of this manual

Manual	Start at	Chapters	Version	Oldest review	Owner
Tenant administration	<u>Manage members and profiles</u>	1	0.1.0	2026-10-08	product-documentation
Portal	<u>Portal journey languages</u>	1	0.2.0	2026-10-18	product-documentation
Workflow	<u>Workflow administration overview</u>	6	1.0.0 – 1.0.1	2026-10-09	product-documentation
Document Center	<u>Document Center administration overview</u>	6	1.0.0	2026-10-17	product-documentation

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Oldest review is the earliest **last reviewed** date among the chapters of the part. Each chapter ends with its own review date, version and owner.

If a menu item described here is missing for you, your profile does not include it. Ask an administrator of your company to review your profile; see [Members and profiles](#).

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Manage members and profiles

SKELETON

This chapter is a placeholder created to test the manual's structure and generation (XTRAK-2246). It describes no product behavior yet: content is written only from observed evidence, under XTRAK-2244 (inventory) and XTRAK-2250 (writing).

For tenant administrators. What a profile allows is described in the user manual's Profiles chapter.

Before you start

Pending.

Invite a member

Pending.

Change a member's profile

Pending.

Remove a member

Pending.

Audit trail

Pending.

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Portal journey languages

Use this procedure to choose the languages the people you invite through Portal access links may use, and to adapt the wording of their journey. Content was checked on 2026-10-09 against `portal-fe 2563ceb` and `portal-be 9dae623`, and observed in DEV on 2026-10-18 (`portal-fe 00ea9a6`, `portal-be 9ad5ae3`) with a synthetic company: the administrator published version 1 with custom wording that the recipient's page then showed, an HTML tag was refused with *HTML tags are not allowed.*, and a profile without administrator access saw the page read-only while the service refused its change.

Who may do it

Only a **company administrator** can publish. Everyone else with access to Portal can open the page and review the settings; they see *Only tenant administrators can change journey languages and texts. You can review the settings here.*, and the service refuses their changes.

Before you start

- Until the first publication the page shows *Never published: the standard settings apply.*
- Each publication creates a new **version**. Links already sent keep working; the version a recipient reads depends on the setting **Pin complete bundles for new links** (step 4).

Steps

1. In Portal, open **Send & Collect > Journey languages**.
2. Under **Languages offered to visitors**, tick the languages to offer: **English**, **Português (Brasil)**, **Português (Portugal)**. At least one is required.
3. In **Default language**, choose one of the enabled languages. It is *used when neither the link nor the visitor's saved preference decides*. With more than one language enabled, people who create links can also fix the language of each link, and recipients see a **Journey language** selector.
4. **Pin complete bundles for new links** — when ticked, each link created after this publication keeps a fixed copy of the journey: later changes to the form or the wording do not reach it. *Applies only to links created after this setting is published. Existing links stay unresolved.*
5. Under **Custom wording**, choose the **Language being edited**. For each message, the **Standard text** is shown; type **Your text** to replace it, or leave it empty to keep the

standard. Keep every placeholder in braces exactly as shown, and stay within the length shown for the message. Security and consent notices cannot be changed: *Security and consent notice — only the standard text is shown to visitors.*

6. Check the result under **Preview**, choosing the **Preview language**.

7. Select **Publish**. The button shows **Publishing...; Journey languages published as version ...** confirms it.

Follow the results

- **Outcomes by language** counts each link once, by the language the recipient actually saw: **Started, Completed, Abandoned, In progress, Revoked**.
- **Journeys with errors** counts links with errors reported from the recipient's page, per language.

If something goes wrong

Nothing was published. Fix the highlighted fields and try again. — nothing changed. The highlighted field says why:

Message	What to do
<i>Enable at least one language.</i>	Tick a language.
<i>The default language must be one of the enabled languages.</i>	Change the default, or enable that language.
<i>There is custom wording for a language that is not enabled.</i>	Enable the language, or clear its custom wording.
<i>The placeholders must be the same as in the standard text. / A placeholder brace is missing or misplaced.</i>	Copy the placeholders from the standard text exactly.
<i>The text is longer than allowed.</i>	Shorten it.
<i>Line breaks are not allowed. / HTML tags are not allowed.</i>	Use plain text on one line.
<i>Security and consent notices cannot be customized.</i>	Clear the custom text of that message.

Message	What to do
<i>Only tenant administrators can publish journey languages and texts.</i>	Ask a company administrator to publish.
<i>The journey languages could not be loaded.</i>	Select Retry .

Last reviewed 2026-10-18 · Version 0.2.0 · Owner: product-documentation

Workflow administration overview

For your company's **administrator** and **technical** profiles. What reviewers and other users do in Workflow — reviewing a document, returning it for correction, tracking a process — is described in the user manual's *Workflow* part; this part covers only what you configure and supervise.

❗ AUDIENCE, CHANNEL AND CONTENT STATUS

- **Audience:** your company's administrator and technical profiles. Every procedure states which of the two may do it.
- **Channel:** the *Administrator Manual*, published on the documentation site at `/manuals/admin/` and also available as a consolidated HTML and PDF.
- **Source:** written from the Workflow interface and service source on 2026-10-09 (interface `08da80c`, service `28337bb`), and checked again for the pilot review on 2026-10-09 against interface `65c117e` and service `4a548b7` (REST integration phase, review queues, run notifications). It has **not yet been observed in a signed-in session**; what remains to be observed is listed in each chapter under *Not observed yet*.

What you manage in Workflow

You want to	Where	Chapter
Create a workflow, lay out its phases and put a version live	Administration › Flow Configuration	Design and publish a workflow
Decide who reviews which documents, and what a rejection does	Administration › Review Queues , the <i>Manual Review</i> phase	Organize human review

You want to	Where	Chapter
Accept a document only when the right people signed it	Administration › Signer profiles , the <i>Signature validation</i> phase	<u>Validate digital signatures</u> — <i>not available yet</i>
Deliver results to your systems and check every delivery	The <i>Send</i> phase, Administration › Integrations & Deliveries , Administration › Connections	<u>Connect your systems</u>
Follow volumes, processing time and reviewer workload	Management	<u>Workflow administration screens</u>

Who may do it

Workflow decides what you may do from the profiles assigned to you in your company; profiles are assigned in *Manage members and profiles*. Two profiles administer Workflow:

Profile	In Workflow
Administrator	Everything in this part. Only the administrator has Review Queues , Build AI and the Management reports, creates and changes Connections and Signer profiles , and sees the signing secret of a webhook.
Technical	Creates, publishes and deletes workflows, starts and follows processes, and follows and resends webhook deliveries. Can read Connections and Signer profiles but not change them.

Other profiles do not administer Workflow: an **operator** reviews documents in **Human Review**. If a menu item described here is missing for you, your profile does not include it; ask your company administrator.

THE SERVICE CHECKS THE PROFILE, NOT ONLY THE MENU

Creating, publishing and deleting a workflow, reading or resending webhook deliveries, configuring review queues, the **Management** reports and changing connections are

refused by the Workflow service to any profile not listed for them above — also when a screen is reached directly by its address.

Journeys in this part

1. Design and publish a workflow — create a workflow, add and connect phases, save a draft, publish a version, restore an older one.
2. Organize human review — add the *Manual Review* phase, assign reviewers to queues, and understand how a process goes back to its requester.
3. Validate digital signatures — register who may sign in a signer profile and check signatures with the *Signature validation* phase (*not available yet*).
4. Connect your systems — send results to a webhook, verify its signature, follow and resend deliveries, register REST connections.

Screens in this part

The Workflow administration screens chapter describes **Workflows** and the workflow editor, the publication refusals, **Review queues**, **Webhook Deliveries**, **Connections**, **Signer profiles**, the **Management** reports and **Build AI**.

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Design and publish a workflow

Use this journey to create a workflow, lay out its phases, and put a version live so that processes can start on it.

Who may do it: your company's **administrator** and **technical** profiles. The service refuses creating, publishing and deleting a workflow for any other profile.

Before you start

- You know which documents the workflow receives and what must happen to them — for example classify, extract, send to human review, deliver.
- If the workflow will validate signatures or deliver to your systems, prepare those first: [Validate digital signatures](#), [Connect your systems](#).

Create the workflow

1. Go to **Administration > Flow Configuration**. The page is titled **Workflows** and lists every workflow as a card with its name, a **Draft** or **Published** badge, its description and *v{version} · {created date}*.
2. Select **+ New Workflow**.
3. In **Create Workflow**, fill in **Name** (required) and **Description**, and choose how to **Start from**:

Option	What you get
Blank canvas	An empty graph with only the <i>Start</i> phase.
Document intake with review	Classify and extract incoming documents, then send them to human review before delivery.

Option	What you get
Identity verification	Crop the identity document, match the selfie against it and cross-check the extracted fields.
Business onboarding	Validate the company, read its documents, cross-check the data and notify the requester.
Contract signature	Extract the agreed terms, generate the contract, collect the signatures and notify the parties.

4. Select **Create**. The workflow editor opens. A template opens in **Guided** mode; a blank canvas in **Canvas** mode.

The new workflow is a **Draft**, version 0. A draft cannot be started.

Lay out the phases

The editor has two modes, switched with **Editing mode** in the toolbar.

Guided shows the flow as an ordered list of **Steps**. Use **Step type** and **Add step** to append a phase, the arrows to move a step earlier or later, and remove to delete it. *Start* cannot be moved or removed. Guided mode only works while the flow is a single chain: as soon as a phase has two outputs in use, the list is replaced by *This flow branches, so it cannot be shown as a list* and **Open the canvas**.

Canvas shows the graph.

1. Add a phase from the **Nodes** palette: click it, or drag it onto the canvas. *Start* is added for you and can exist only once.
2. Connect phases by dragging from an output handle of one phase to the next phase. A phase cannot link to itself, and the same link cannot be drawn twice.
3. Select a phase to open **Phase Configuration**: give it a **Description** (the name shown on the node) and fill in its settings.
4. To remove a phase or a link, select it and press **Delete** or **Backspace**. **Undo** and **Redo** are in the toolbar (also Ctrl/Cmd+Z, and Ctrl+Shift+Z or Ctrl+Y).

Phases you can use

Phase	What it does	Outputs
Start	Entry of every process; its output is what the process was started with.	One
KYB	Validates the company's VAT/NIPC against the EU VIES service.	One
Crop	Crops fields from the document. Leave Fields to crop empty to let the AI detect the important fields.	One
Split	Splits a file into its documents.	One
Classification	Identifies the document type. Classification Acceptance Threshold is the minimum confidence (0–100%) for a classification to be accepted.	Normal / Alternative
Extraction	Extracts the fields. Detect document type also classifies each document and exposes the result to conditions, at the cost of one extra vision call per process.	Normal / Alternative
Zero Shot	Extraction without a prepared template.	One
Facematch	Compares the identity documents with the selfie.	One
Cross-check	Compares a field of one document with a field of another, or with what the customer typed in the form. A divergence never rejects a case: it is sent to human review.	One
Manual Review	Stops the process until a person approves or rejects each document. See Organize human review .	Normal / Alternative

Phase	What it does	Outputs
Conditional	Asks a yes/no question about the previous phase's result and routes the process down True or False .	True / False
Generate document	Renders the case into the document the customer signs.	One
Signature	Parks the process and asks the customer to sign what an earlier phase produced.	One
Signature validation	Checks the signatures of a PDF against a signer profile. Not available yet — see Validate digital signatures .	OK / NOK
REST integration	Calls your system's REST API through a connection . Its settings have the tabs Request (connection, Method , Path , path and query parameters, non-secret Headers , Timeout (seconds) , Retries , Wait between retries (seconds) , Success status codes), Schemas , Request mapping , Response mapping and Test . Transient failures (5xx, 408, 429, timeout) are retried.	Success / Error — with Error unconnected, a permanent failure or exhausted retries fail the run
Send	E-mails the previous phase's output, or posts it to your webhook when an endpoint URL is set. See Connect your systems .	One

The palette also lists **AI Executor** and **Send Message**. They are not described here: the Workflow service has no step that runs them (see *Not observed yet*).

Classification, **Extraction**, **Manual Review**, **Conditional**, **Facematch** and **Signature validation** accept only one incoming link.

Phases without a dedicated form — *Start*, *Split*, *Zero Shot* and *Manual Review* — show a **Config (JSON)** box instead.

To see phases like these working together in a published workflow, the two videos below follow real cases end to end: an insurance claim checked by 14 cross-check rules (in Brazilian Portuguese), and a bank application caught by face match and cross-checks (in English).



Sinistro, passo a passo (3/6): As 14 regras que conferem um sinistro automaticamente (pt-BR)
[Watch on YouTube](#)



Bank CAN on Cogneris: Catching a mule-account application with face match and cross-checks
[Watch on YouTube](#)

Save a draft

Select **Save Draft**. Saving only stores the draft: a published workflow keeps running the version that is live until you publish again.

Publish a version

1. Select **Publish**.
2. The editor checks the flow before asking you to confirm. Fix what it reports and publish again:

Message	Cause
<i>Save the workflow first before publishing.</i>	The workflow was never saved.
<i>The workflow must have at least one start node. / The workflow must have just one start node.</i>	There must be exactly one <i>Start</i> phase.
<i>Signature validation "...": the OK output is not connected. (or NOK)</i>	Both outputs of a <i>Signature validation</i> phase must lead somewhere.

3. Confirm in **Publish workflow** — *Confirm publish of version {n}? —* with **Publish**.

The editor saves the draft and publishes it. The badge changes to **Published** with the new version number.

If the service refuses, the editor shows the service's message, or *Failed to publish workflow*. The refusals are listed in [Workflow administration screens](#).

What publishing changes

- Every publish creates a **new version**, even when nothing changed, and stores an unchangeable copy of it in **Version history**.

- Processes already running keep the version they started on. Only processes started after the publish use the new version.
- If a *Send* phase has a webhook endpoint and no signing secret yet, one is created at publish.

Start a process to test it

On **Workflows**, a published workflow shows **Start**. It opens **Start Workflow**: add the **Documents to process** — PDF, images (PNG/JPG/TIFF/BMP), DOC/DOCX, XLS/XLSX, CSV or TXT, up to 50 MB each — and select **Start**. You land on **Processes**, where the new run appears.

A process started here has no requester: if a reviewer rejects its documents, it ends as failed instead of going back to anyone. See [Organize human review](#).

Go back to an earlier version

1. In the editor, open **Version history**. Each published version shows $v\{n\}$, **live** on the current one, who published it and when, and its number of phases.
2. **Inspect** shows a version *as published*.
3. **Restore** copies that version into the draft. Confirm with **Copy into draft**.

Restoring does not change which version is live. It puts the workflow back to **Draft**, so **Start** disappears from the list until you **publish** again.

Delete a workflow

On **Workflows**, select the trash icon of the workflow and confirm *Delete "{name}"?* with **Delete**. The workflow leaves the list; the versions already published stay recorded for the processes that used them.

The service does not check whether processes are still running on the workflow. Delete only a workflow that has nothing in progress — see **Management › Overview**.

How to confirm it worked

- The card on **Workflows** shows **Published** and the version you confirmed.
- **Version history** lists that version as **live**.
- A process started after the publish shows the new phases on **Processes**.

If something goes wrong

What you see	What it means	What to do
Start is missing on a workflow	It is a draft — never published, or restored from an older version	Publish it.
<i>Failed to publish workflow.</i> or a service message	The service refused the publish	See Publication refusals .
+ New Workflow, Publish or Delete fails with an access error	Your profile is neither administrator nor technical	Ask your company administrator.

Not observed yet

- The editor has not been walked in a signed-in session; captures are pending.
- **AI Executor** and **Send Message** are offered in the palette, but the Workflow service has no step that executes them. Do not use them in a published workflow until this is confirmed.
- The settings of each AI phase (*Split, Zero Shot, Facematch, KYB, Generate document, Signature*) are not described field by field yet.

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Organize human review

Use this journey to put people in the loop: add a *Manual Review* phase to a workflow, decide which reviewers see which documents, and understand what happens when a reviewer rejects a document. How a reviewer decides each document is described in the user manual's *Review a document* journey.

Who may do it:

Procedure	Profile
Add the <i>Manual Review</i> phase to a workflow	Administrator or technical
Assign reviewers to queues (Review Queues)	Administrator only — the service refuses everyone else
Review documents	Any profile with Human Review (for example operator)

Add the review to a workflow

1. Open the workflow in the editor; see [Design and publish a workflow](#).
2. Add **Manual Review** after the phases whose results a person must check (typically after *Extraction*, *Cross-check* or *Facematch*).
3. Connect its outputs. **Normal** is the path of an approved process.
4. Save and publish.

The phase has no settings form: it shows **Config (JSON)**. You do not choose the kind of review there. The review screen adapts to the process — classification, fields, fraud, face match, KYB, split — from the documents and phases that ran before it.

When a process reaches the phase, it stops with each document *pending* in the review queue of its document type, until a reviewer approves or rejects every document.

Decide who reviews which documents

Every document waits in the **queue** of its document type. Three extra queues collect *Unidentified* documents, documents sent to *Fraud review* and documents sent to *Face conference*.

1. Go to **Administration › Review Queues**. The page lists each queue with the number of documents waiting in it.
2. Select a queue.
3. Tick the people who review it. **Find a person** filters by name or e-mail. Only members of your company are listed; there are no groups.
4. Select **Save**. *Saved* and *{n} reviewer(s) assigned* confirm it.

How assignment works:

- A reviewer **with no queue** keeps seeing every queue, including **All**.
- Once you assign someone to a queue, they see **only their queues**.
- A reviewer restricted to queues decides **document by document**: run-wide actions — reject everything, approve everything, return to the requester — are refused for them.

A queue whose document type was removed from the catalog, with nothing waiting in it, shows a warning: its assignments no longer route any document. Clear them, or rename the type back.

Returning a process to its requester

What a rejection does depends on where the process came from.

Process	When every document is decided and at least one was rejected
From the Portal (submitted by a requester through an access link)	The process goes back to the requester to correct and resubmit. It appears on Human Review › Awaiting requester correction .
Started inside Workflow (no requester)	The process ends as failed (<i>manual_review_rejected</i>). The list of rejected documents is e-mailed to the requester's address when the run has one, otherwise to the Recipient email of the workflow's first <i>Send</i> phase; with neither, nobody is notified. The person who started the run is not e-mailed.

For Portal processes, reviewers also have **Return to requester** on the review screen. It sends the rejected documents back and **approves every still-pending document by omission**, without review — the confirmation says how many. It is enabled only when the process came from the Portal, at least one document was rejected and at least one is still pending.

A review that already has a rejection and gets no new decision for 24 hours (the service default) closes by itself the same way: pending documents are approved by omission and the dossier records a *System* event.

A process with an open review that nobody touches is closed automatically after an idle period (24 hours by default) **only if** it already has a rejection. A review with no rejection waits indefinitely.

How to confirm it worked

- A reviewer you assigned to a queue sees only that queue in **Human Review**.
- After a rejection on a Portal process, the process is listed on **Awaiting requester correction** with **Returned at**, **Waiting (hours)** and **Returned submission round**.
- **Management › Operator ranking** shows the documents each reviewer decided in the window.

If something goes wrong

What you see	What it means	What to do
Review Queues is missing, or it fails to load	Your profile is not administrator	Ask your company administrator.
A reviewer is told the document belongs to a queue they are not assigned to	The reviewer is restricted to other queues	Add them to the queue, or remove all their assignments so they see every queue.
A reviewer cannot reject or approve everything at once	The reviewer is restricted to queues	Decide document by document.

What you see	What it means	What to do
Return to requester is disabled	The process did not come from the Portal, nothing was rejected yet, or nothing is pending	Use Reject on the documents; for an internal process the run ends as failed.
Try again is missing on a process whose review was rejected	A rejection is a decision, not a failure	Start a new process with corrected documents (internal), or wait for the requester to resubmit (Portal).

Not observed yet

- Not walked in a signed-in session; captures are pending.
- The idle period is set per environment by Cogneris, not per company; 24 hours is the default value in the service.

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Validate digital signatures

Use this journey to accept a signed PDF only when the right people signed it with a valid ICP-Brasil certificate: register who may sign in a **signer profile**, then check documents with the **Signature validation** phase.

Who may do it:

Procedure	Profile
Create, edit and delete signer profiles	Administrator only. Other profiles that see Signer profiles can only read it.
Add the <i>Signature validation</i> phase to a workflow and publish it	Administrator or technical

NOT AVAILABLE YET

The **Signer profiles** screen and the **Signature validation** phase are in the Workflow interface, but the Workflow service that stores the profiles, tests a document and runs the phase has **not been released** (XTRAK-2326). Until it is:

- **Signer profiles** cannot load or save profiles;
- the **Test** tab cannot validate a document;
- a published workflow that reaches a *Signature validation* phase **fails** at that phase.

Do not publish a workflow with this phase until this notice is removed. This chapter describes the interface so that it is ready on release; it will be reviewed against the released service.

Before you start

- You know the CPF or CNPJ of each person or company allowed to sign. Signers are matched by the CPF or CNPJ in their ICP-Brasil certificate, never by name.
- A sample signed PDF helps: the profile can read its signers for you, and the phase can test against it.

Register who may sign

1. Go to **Administration > Signer profiles**. The list shows each profile's **Name**, **Signers** and **Usage** (in how many workflows it is used).
2. Select **New profile**.
3. Fill in **Profile name** and, optionally, **Description**.
4. Add each signer with **Add signer**:

Field	What to enter
Identifier type	CPF (person) or CNPJ (company)
CPF or CNPJ	The identifier. Check digits are verified; a sequence of repeated digits is refused.
Name (for reference only)	A name to recognise the signer. It is not used for matching.
Role	Required or Optional
Certificate type	Any type , A1 or A3
Allowed issuing authorities	Leave empty to accept any trusted ICP-Brasil authority.

Or select **Learn from a document (PDF)**: the ICP-Brasil signers found in the document are added as **Required**, with their issuer filled in. Review the role of each one.

5. Select **Save profile**.

Identifiers are **write-only**: once saved, a CPF or CNPJ is only ever shown masked. To change one, use **Replace** and type the new value.

Check signatures in a workflow

1. In the workflow editor, add **Signature validation** after the phase that produces the signed PDF.

2. In **Signers**, choose the **Signer profile. Manage profiles** opens **Signer profiles**.

3. Choose the **Rule over the signatures**:

Rule	Passes when
Any listed signer	At least one valid signature comes from a signer of the profile.
All required signers	Every signer marked Required signed.
N of M	At least Minimum number of signers different signers of the profile signed.

4. Connect **both** outputs: **OK** continues the flow; **NOK** handles a rejected document (for example a *Manual Review* or a *Send* that notifies). Publishing is refused while either output is unconnected.

5. Optional: in **Test**, choose a **PDF document** and select **Validate document**. The result is shown as a report and nothing is recorded in any run.

6. Save and publish.

The panel warns while the rule cannot work: no profile chosen, an empty profile, a minimum below one or above the number of signers, or **All required signers** on a profile with no required signer.

Read the result

The report — in the **Test** tab and in the run's phase detail — shows **Result** (OK or NOK), the reasons, and one line per signature: **Signer** (with its issuer), masked **Identifier**, **Signed at** (*Trusted timestamp* or *Declared time, not proven*) and **Status** (*Valid*, *Invalid* or *Indeterminate*).

Reason	Meaning
The document has no signature	—
The signature is not valid	The signature does not verify.

Reason	Meaning
The document was modified after signing	The content changed after the signature.
The certificate is not from a trusted authority	Not an ICP-Brasil trusted chain, or not one of the allowed authorities.
The certificate had expired at signing time	—
The certificate was revoked	—
The signer is not in the profile	A signature comes from someone not listed.
A required signer did not sign	Under All required signers .
Revocation could not be checked	The result is <i>Indeterminate</i> .

Delete a profile

Select **Delete** and confirm *Delete this profile?*. A profile used by a published workflow cannot be deleted: the screen lists the workflows that use it. Change or unpublish them first.

If something goes wrong

What you see	What to do
<i>This CPF or CNPJ is not valid: the check digits do not match.</i>	Correct the identifier.
<i>No ICP-Brasil signature with a CPF or CNPJ was found in the document.</i>	Add the signers by hand.
<i>Too many tests in a short time.</i>	Wait a moment and test again.
Publish refused: <i>Signature validation "...": the OK output is not connected.</i> (or NOK)	Connect both outputs.

What you see	What to do
Publish refused: <i>choose an existing signer profile, the signer profile has no signers, or the rule does not fit the signer profile</i>	Fix the phase's profile or rule.
New profile is missing	Your profile is not administrator.

Not observed yet

Everything in this chapter: the service is not released (see the notice above).

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Connect your systems

Use this journey to deliver the result of a workflow to one of your systems through a webhook, prove to that system that the call came from Cogneris, and follow every delivery. It also covers **Connections**, where you register REST endpoints and their credentials.

Who may do it:

Procedure	Profile
Configure the webhook of a <i>Send</i> phase	Administrator or technical (publishing the workflow)
See, copy and regenerate the webhook signing secret	Administrator only
Follow and resend deliveries (Integrations & Deliveries)	Administrator or technical — the service refuses everyone else
Create, edit, test and delete connections	Administrator only. Other profiles can only read Connections .

The signing secret is shared only with the people who run the receiving system — never in a ticket or an e-mail thread.

Send results to a webhook

1. In the workflow editor, add a **Send** phase where the result must leave the workflow, usually at the end.
2. In its configuration fill in:

Field	What to enter
Integration name	A name for your system, for example <i>My CRM</i>

Field	What to enter
Endpoint URL (HTTPS)	The address that receives the call. Only HTTPS is accepted.
HTTP method	POST, PUT, PATCH or DELETE
Description (optional)	What this integration does

With an endpoint URL set, the phase **posts the previous phase's output** to it instead of sending an e-mail. Without one, it e-mails the output to **Recipient email** with the **Subject** you set.

- Optional: **Test endpoint** checks that the address answers — *Endpoint reachable.* or *Endpoint not reachable:*
- Save and publish. Publishing is refused with *Send phase webhook endpoint must be a valid HTTPS URL.* when the address is not a valid HTTPS URL.

Try the payload before pointing to your system

Under **Test URL**, after saving the workflow, select **Generate test URL**. Cogneris gives you a temporary address that captures everything the phase sends.

- Use as endpoint** puts it in **Endpoint URL**; run the workflow; **View requests** lists what arrived (time, method, status, size, headers and payload).
- The URL expires after the number of days shown; its history is kept for 7 days. **Revoke** ends it earlier.
- Replace it with your real endpoint before going live.

Verify that a call came from Cogneris

Administrators see the phase's **Signing secret**, with **Copy** and **Regenerate**. It is created when an endpoint is set, and at the latest when the workflow is published.

Each call carries:

Header	Content
X-Xtrakt-Signature	sha256= followed by the hexadecimal HMAC-SHA256 of the raw request body, keyed with the signing secret
X-Xtrakt-Run-Id	The process (run) that produced the call
X-Xtrakt-Workflow-Id	The workflow
Content-Type	application/json; charset=utf-8

Your system recomputes the HMAC over the body exactly as received and compares it with the header. Use the secret **as the text shown** — do not decode it from hexadecimal.

Regenerate invalidates the previous secret at once: update the receiving system at the same time, then publish.

Follow and resend deliveries

1. Go to **Administration > Integrations & Deliveries**. The page is titled **Webhook Deliveries**.
2. Filter by **From**, **To**, **Workflow** and **Status** (*Success* or *Failed*), then **Apply**.
3. Each line shows **Date/Time**, **Workflow**, **Document**, **Endpoint**, **HTTP Status**, **Response time**, **Outcome** and **Attempt**.
4. Select a line for **Delivery detail**: the same fields plus **Run ID**, **Error message** and **Payload sent**.
5. To deliver again, select **Resend webhook**. *Webhook resent successfully.* or *Resend failed.* confirms the result.

Cogneris retries a delivery automatically only when your system answers 5xx, 408 or 429. Any other 4xx answer is treated as final: fix the cause, then resend.

Register a REST connection

Connections holds reusable base URLs and credentials for REST integrations.

WHO USES A CONNECTION

The **REST integration** phase of the workflow editor calls a connection; see [Phases you can use](#). The base URL and the credentials live only in the connection, never in the phase. **Usage** lists the workflows whose phases use it.

1. Go to **Administration > Connections** and select **New connection**.
2. Fill in **Name** (up to 120 characters, unique), **Base URL** (must start with `https://`, without credentials in it, and point to a public address), **Authentication type** and **Timeout (seconds, 1 to 120)**.
3. Fill in the credentials of the authentication type:

Authentication	Fields
None	—
API key	API key location (Header or Query string), Parameter name , the key
Basic (user and password)	Username , password
Bearer token	The token
OAuth2 (client credentials)	Token URL , Client ID , client secret, Scope (optional) , Audience (optional) , Client authentication

4. Optional: **Default headers** are sent with every call. Mark a header **Secret** to store its value encrypted.
5. Select **Save**.

Secrets are **write-only**: once saved they show only as `.....` **set**. **Replace** sets a new value; leaving it untouched keeps the stored one. Secrets are stored encrypted; if they cannot be encrypted, the save is refused rather than storing them in clear.

Test connection (on a saved connection, while editing) sends one GET to the base URL with the connection's authentication and reports *Connection OK: HTTP {status} in {ms} ms* or *Connection test failed:* It never shows a secret or the response body. Tests are rate limited.

Delete removes the connection and wipes its secrets. A connection used by a published workflow cannot be deleted; the screen lists those workflows.

How to confirm it worked

- The test URL, or your system, received the call with a valid `X-Xtrakt-Signature`.
- **Webhook Deliveries** shows the delivery with *Success* and the HTTP status your system answered.

If something goes wrong

What you see	What it means	What to do
<i>Enter a valid HTTPS URL.</i>	The endpoint is not HTTPS	Use an HTTPS address.
Deliveries show <i>Failed</i> with a 4xx status	Your system refused the call; it is not retried	Fix the receiving side, then Resend webhook .
Your system rejects the signature	Wrong secret, or the body was changed before checking	Copy the current secret; compute the HMAC on the raw body; use the secret as text.
Signing secret is not shown	Your profile is not administrator	Ask your company administrator.
Webhook Deliveries does not load	Your profile is neither administrator nor technical	Ask your company administrator.
<i>The URL resolves to a non-public address.</i>	The connection points to a private network	Use a publicly reachable address.
<i>A connection with this name already exists.</i>	Names are unique	Choose another name.

Not observed yet

- Not walked in a signed-in session; captures are pending.
- The JSON layout of the payload is not documented here yet; use **Test URL** to see it.

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Workflow administration screens

Reference of the Workflow screens an administrator uses, in the order of the **Administration** and **Management** menus. Each entry states who sees the screen; the journeys explain how to use them. Screens shared with reviewers (**Human Review**, the review dossier, **Awaiting requester correction**, **Processes**) are described in the user manual's *Workflow screens* chapter.

Where the screens are

Menu	Screen	Who sees it
Operations › Build AI	Build AI	Administrator
Management › Overview, Processing time, Operator ranking	Management	Administrator
Administration › Flow Configuration	Workflows and the workflow editor	Administrator, technical
Administration › Review Queues	Review queues	Administrator
Administration › Integrations & Deliveries	Webhook Deliveries	Administrator, technical
Administration › Connections	Connections	Read: every profile that sees Administration. Write: administrator.

Menu	Screen	Who sees it
Administration › Signer profiles	Signer profiles	Read: every profile that sees Administration. Write: administrator. <i>Not available yet.</i>

Workflows

Title **Workflows**. One card per workflow: name, **Draft** / **Published**, description, $v\{version\}$ · $\{created\}$.

Control	Effect
+ New Workflow	Opens Create Workflow: Name, Description, Start from (blank canvas or one of four templates).
Start	Only on a published workflow. Opens Start Workflow to upload the documents of a new process.
Edit	Opens the workflow editor.
Trash icon	Deletes the workflow after <i>Delete "{name}"?</i> .

There is no duplicate, import or export.

Workflow editor

Toolbar, left to right: **← Back**, the workflow name, the $\{status\}$ · $v\{n\}$ badge, **Version history**, **Editing mode (Guided / Canvas)**, messages, **Undo / Redo**, **Save Draft**, **Publish**.

- **Nodes** palette (Canvas) or **Steps** list (Guided) — the phases; see [Design and publish a workflow](#).
- Canvas controls: **Zoom in**, **Zoom out**, **Fit to screen**, **Reset view**.
- **Phase Configuration** panel — **Description** and the phase's settings, or **Config (JSON)** for phases without a form. **Drag to resize** widens it.
- **Version history** — every published version with **Inspect** and **Restore**.

Publication refusals

Checked by the editor before publishing:

Message	Cause
<i>Save the workflow first before publishing.</i>	Never saved
<i>The workflow must have at least one start node.</i>	No <i>Start</i> phase
<i>The workflow must have just one start node.</i>	More than one <i>Start</i> phase
<i>Signature validation "{phase}": the {OK/NOK} output is not connected.</i>	An output of a <i>Signature validation</i> phase leads nowhere

Returned by the service:

Refusal	Cause
<i>Send phase webhook endpoint must be a valid HTTPS URL.</i>	A <i>Send</i> phase has an endpoint that is not an absolute HTTPS address
<code>rest_call_config_invalid</code> , naming the phase and the field	A <i>REST integration</i> phase is incomplete or invalid — for example no connection, or a mapping issue listed under Issues to fix
Workflow not found	The workflow was deleted, or belongs to another company
Access denied	Your profile is neither administrator nor technical
<i>Signature validation "{phase}": choose an existing signer profile. / the signer profile has no signers. / the rule does not fit the signer profile.</i>	Defined for the <i>Signature validation</i> phase; returned once its service is released

Any other refusal is shown as *Failed to publish workflow*.

Starting a process on a workflow that is not published is refused; **Start** is only offered on published workflows.

Review queues

Title **Review queues**. One chip per queue with the number of documents waiting; the selected queue lists the company's members to tick, with **Find a person**, **Save**, **Cancel** and **Refresh**. See [Organize human review](#).

Webhook Deliveries

Filters **From**, **To**, **Workflow**, **Status**; columns **Date/Time**, **Workflow**, **Document**, **Endpoint**, **HTTP Status**, **Response time**, **Outcome**, **Attempt**; **Delivery detail** with **Run ID**, **Error message**, **Payload sent** and **Resend webhook**. See [Connect your systems](#).

Connections

Columns **Name**, **Base URL**, **Authentication**, **Usage**; **New connection**, **Edit**, **Delete**, **Test connection**. See [Connect your systems](#).

Signer profiles

Columns **Name**, **Signers**, **Usage**; **New profile**, **Edit**, **Delete**. See [Validate digital signatures](#).
Not available yet.

Management

Reports for administrators. The service refuses them to every other profile.

Screen	What it shows
Overview	Everything open right now: totals In progress and Awaiting review , and per process type Running , Awaiting review and Oldest . A type opens its runs on Processes .

Screen	What it shows
Processing time	For the last 7, 30 or 90 days, per process type: Average, 95th percentile, Slowest, Fastest and how many completed; and the runs in progress with Requester, Elapsed, Remaining, Expected , flagged <i>Later than usual</i> when overdue.
Operator ranking	For the same window, documents Decided per operator, with Approved, Rejected and Share . The ranking is by volume.

Build AI

Administrators only. Describe a process in plain words and the assistant drafts what it needs — forms, document classifiers, workflows and Word templates — through the steps **Describe, Questions, Plan** and **Done**. Nothing is created until you select **Approve and create**.

Not observed yet

- No screen of this chapter has been walked in a signed-in session; captures are pending.
- Build AI is summarised from its interface only.

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Document Center administration overview

For company administrator and technical profiles. What the Document Center is, and what every other profile can do in it (Dashboard, upload, opening a shared link), is described in the user manual's *Document Center* part.

❗ CONTENT STATUS

This part was written from the interface and service source of the build serving DEV on 2026-10-09 (Document Center interface `f3b92b7`, service `bb1cb28`). On 2026-10-17 and 2026-10-18 every screen was observed in DEV with a synthetic company administrator (interface `7c2a77e` / service `cfb72ae`, then interface `44d2f38` / service `6fd4193`), after the fixes of process status (XTRAK-2548), search (XTRAK-2549) and **Share** (XTRAK-2499); each screen of Document Center administration screens states its own content status, and the items still to be observed are listed under *Not observed* there.

What you manage here

Behind **My Drive** the Document Center keeps three kinds of content:

- **Processes** — cases that arrived with their documents, grouped by **process type** (the form or workflow they came from). A process carries the requester, an identifier, the extracted data, the checklist of expected documents, the documents generated by the workflow, and the history of every review decision.
- **The Inbox** — loose documents (uploaded, received by e-mail or through the API) waiting to be linked to a process, archived or discarded.
- **Folders** — the folder tree (**Explorer**) that holds documents, including loose and archived ones. From a document you can create a share link.

Processes are **read-only** in the Document Center: their documents are reviewed and decided in Workflow, and the Document Center shows the outcome and the trail.

Who may do it

Screen	Profiles
Dashboard	Every profile that includes the Document Center
My Drive , process types, Processes , process detail	Company administrator and technical profiles
Inbox , Explorer , document detail and share links, Search	Company administrator and technical profiles

The platform menu shows **My Drive** only to administrator and technical profiles. These screens give access to your company's processes and documents, so assign those profiles only to people who need that access. Profiles are assigned in *Manage members and profiles*.

Journeys in this part

1. Triage the Inbox — link a loose document to its process, archive it or discard it.
2. Follow a process — find a process from My Drive and read its documents, data and decisions.
3. Organize and share documents — create folders, upload into them, open a document and share it by link.
4. Search documents — full-text search with dates in plain words.

Screens in this part

The Document Center administration screens chapter describes **My Drive**, the process type page, **Processes**, **Process details**, **Inbox** and its **Link to a process** dialog, **Explorer**, **Document details** and **Search documents**.

Known limitations

- There is no screen to list or revoke share links, and the **Share** button creates links without password, expiry or access limit.
- There is no action to delete, move, rename or tag a document from the interface; only Inbox documents can be discarded.
- The **Integrations** and **Comments** views of a process are placeholders.
- The Inbox shows the 50 most recent loose documents.
- Pinned process types are remembered in your browser only.

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Triage the Inbox

Use this journey to clear loose documents — files that arrived by e-mail, upload or API without a process.

Before you start

- You have a company administrator or technical profile, and **My Drive** appears in the Document Center menu.
- The **Inbox** card in **My Drive** shows a number greater than zero. A card with documents waiting is highlighted.

Steps

1. In the Document Center menu, select **My Drive**, then the **Inbox** card. The **Inbox** lists one row per document: its origin (**Email**, **Upload** or **API**), name, and **Received** date and time.
2. For each document, choose one action:
 - **Link** — the document belongs to a process. Go to step 3.
 - **Archive** — keep the document without a process. It leaves the Inbox at once.
 - **Discard** — the document is not needed. A confirmation asks *Discard document? — This permanently removes the document.* Select **Discard** to confirm, or **Cancel**.
3. In **Link to a process**:
 - Under **Suggested**, the Document Center lists processes that match identifiers or e-mail addresses read from the document, with the reason (**by ID** or **by email**). If there is none, it shows *No automatic suggestion*.
 - Under **Search process**, type a name, requester or identifier and select **Search process**.
 - Select **Link** on the right process. The button shows **Linking...** and the dialog closes.
4. (Optional) To add a loose file yourself, select **Upload loose file** at the top of the Inbox and pick the file. It appears in the list with origin **Upload**.

Expected result

- A **linked** document leaves the Inbox and becomes one of the process's documents.
- An **archived** document leaves the Inbox, gets the status *Archived* and stays in its folder; it can be found through **My Drive** > **Archived / Loose files**.

- A **discarded** document is deleted. This cannot be undone.

How to confirm it worked

- The row is gone from the Inbox, and the **Inbox** card count in **My Drive** went down.
- For a linked document: open the process (see [Follow a process](#)) and find the document among its thumbnails.
- For an archived document: its timeline shows *Archived*.

If something goes wrong

What you see	What it means	What to do
The row comes back after an action	The action failed and the list was reloaded	Try again. If it repeats, contact support.
<i>Could not load the inbox</i> with Retry	The list did not load	Select Retry .
Link in the dialog does nothing visible	The link failed; the dialog stays open	Try again or choose Cancel .
<i>No process found</i>	The search matched no process	Search by requester name or identifier exactly as received.
<i>Nothing to triage</i>	The Inbox is empty	Nothing to do.

Observed on 2026-10-17 in DEV: uploading a loose file and opening **Link to a process**; no document was archived, discarded or linked.

Not observed: which identifiers the suggestions read from a document, and the Inbox with more than 50 documents (only the 50 most recent are listed).

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Follow a process

Use this journey to find a process and read everything the Document Center keeps about it: its documents, the data extracted from them, the checklist, the review decisions and the audit trail.

Before you start

- You have a company administrator or technical profile, and **My Drive** appears in the Document Center menu.
- The process has arrived — for example a Portal submission that ran through Workflow. Processes appear on their own; you do not create them here.

Steps

Find the process

1. In the Document Center menu, select **My Drive**. One card per **process type** shows how many processes it has and, when relevant, *n awaiting review* or *n in progress*. The same types are listed under **My Drive** in the side menu.
2. Select the card of the process type. The page shows the **Recent processes** of that type (up to 10), each with its status, requester, identifier, age (*just now*, *5h*, *3d*), number of documents and checklist progress.
3. Select the process. If it is not among the recent ones, select **View all**: the **Processes** list opens filtered by that type.
4. In **Processes**, narrow the list if needed: type in *Search requester or identifier...*, choose a status in **All statuses**, and select **Filter**. Use **Previous** and **Next** to page (25 per page). Select a row to open the process.

To keep a type at the top of **My Drive**, select **Pin** on its card.

Read the process

5. **Process details** opens. The header shows the process name, its status and, when the process has a checklist, a ring with the documents received out of those expected. Below it: **Requester**, **Identifier**, **Workflow**, **Received** and **Source**.
6. On the left, select a document thumbnail to show it in the preview.

7. On the right, use the icon bar (hover an icon to see its name):

- **Extracted data** — the fields read from the selected document, under its document type.
- **Checklist** — each expected document, ticked when received, or marked **Pending** or **Optional**; then the **Form answers**.
- **Generated** — documents the workflow produced; **Open in the viewer** or **Download**.
- **Timeline** — the **Correction history** (one round per return to the requester) and every event of the process.
- **Cross-check** — what agreed across the documents and what did not. It never rejects the case; you decide.
- **Workflow** — the review outcome (**Approved**, **Refused** or **Returned to requester**), who decided and when, then each phase of the run and its status.
- **Audit** — the **Human decisions** and the **Immutable log** of events.
- **Versions** — every version of every document, with **Download**.

Expected result

You can answer, for one process: which documents arrived and which are missing, what was read from them, who decided what and when, and whether the requester was asked to correct something.

How to confirm it worked

The status in the header matches the outcome in **Workflow**: for example *Awaiting requester correction* with the outcome **Returned to requester**, and a round in **Timeline** › **Correction history**.

Process statuses

Status	Meaning
New	Received; its workflow has not started
Processing	The workflow is running — including a reprocessing after the requester resent documents
Awaiting review	Waiting for a reviewer in Workflow

Status	Meaning
Awaiting requester correction	A reviewer refused one or more documents and the requester was asked to correct and resend
Completed	Finished
Rejected	A reviewer refused documents and there is no requester to return them to (the process did not come from a Portal link)
Failed	The workflow run stopped and will not resume on its own; someone has to look at it. This status has no entry in the All statuses filter.

The **Dashboard** counts *New*, *Processing* and *Awaiting review* as **In progress**.

If something goes wrong

What you see	What it means	What to do
<i>Could not load this process.</i>	The process did not load	Reload the page.
<i>Preview unavailable</i>	The selected document has no stored file, or its preview did not load	Select another thumbnail, or download it from Versions .
Workflow shows <i>No workflow run linked to this process yet.</i>	The process did not come from a workflow, or the run is not linked	Nothing to fix here; check the process Source .
Audit > Human decisions says some decisions are from before the trail started	The process is older than the decision trail	Earlier decisions are not in the trail; the Immutable log still lists the events it has.
A type card is missing from My Drive	No process of that type has arrived	Nothing to fix here.

The **Integrations** and **Comments** icons open a placeholder: *This view arrives in a later phase.*

*Observed on 2026-10-18 in DEV: **My Drive**, a process type page, **Processes** and every view of **Process details** for a process whose workflow run finished; the status badge showed *Completed*.*

*Not observed: how a **Failed** process is shown.*

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Organize and share documents

Use this journey to create folders, upload documents into them, open a document and give someone outside your company a link to it.

Before you start

- You have a company administrator or technical profile, and **My Drive** appears in the Document Center menu.
- To share: the person you share with needs no account. Anyone who has the link can open the document, so send it only to the intended person.

Steps

Create a folder and upload into it

1. In the Document Center menu, select **My Drive**, then **Archived / Loose files**. (From the **Dashboard**, **Browse folders** opens the same screen.) The **Explorer** opens: the folder tree on the left, starting at **/ (root)**, and the documents of the selected folder on the right.
2. To create a folder, select where it goes — **/ (root)** or a folder — type its name in **Folder name** and select **Create**. Reload the page to see the new folder in the tree.
3. Select a folder in the tree. Use ► to open a folder and see its subfolders.
4. Drop files on **Drop files here or click to choose**, or select it and pick files. You can upload several at once. Each file appears in the list as a new document.

Until a folder is selected, the drop area is disabled and reads *Select a folder before uploading files*.

Open a document

5. Select a document in the folder (or in search results). **Document details** opens: the name, then *Status: ... · Confidentiality: ...*, a preview of the current version, and two tabs.
6. In **Details** you find:
 - the status and confidentiality badges;

- the **AI panel**, when the document was classified: **Document type**, **Confidence** (a percentage) and **Fraud** (*Possible fraud* or *No fraud detected*);
- **Versions** — each version with its number, file name and size, and ✓ *signed* when it carries a signature;
- **Tags**.

7. In **Timeline**, every event of the document is listed: created, versions uploaded, viewed, downloaded, moved, shared, status changes and others.

Share it

8. In **Document details**, select **Share**. A banner shows **Link copied to clipboard** and the link. Select **Copy again** if needed, or **Dismiss**. The banner closes by itself after a few seconds.
9. Send the link to the person by your own channel (e-mail, chat). What they see is described in the user manual, *Open a shared document*.

Expected result

- The folder exists and holds the uploaded documents.
- The shared link opens the document's current version for whoever has it, with download allowed, without password, expiry or access limit.
- The document's timeline shows *Shared* when the link is created, and *Downloaded* each time the link is opened.

How to confirm it worked

- The uploaded documents are listed in the folder.
- In **Document details** › **Timeline**, a *Shared* event appears after you select **Share**.

If something goes wrong

What you see	What it means	What to do
The new folder is not in the tree	The tree is loaded when the page opens	Reload the page.

What you see	What it means	What to do
<i>We couldn't load documents for this folder.</i> with Try again	The list did not load	Select Try again .
<i>Preview not supported for this file type.</i>	Only PDF, PNG and JPG are previewed	Document details has no download button. If the document belongs to a process, download it from the process Versions view.
A link was shared by mistake	The product has no way to revoke a link today	Report it to support as an incident, with the document name and the time you selected Share .

Known limitations

- There is no action to move, rename, tag, change the status or delete a document from the interface.
- A link cannot be given a password, an expiry or an access limit from the interface, and links cannot be listed or revoked there.

Observed in DEV: creating a folder, uploading a PDF and opening **Document details** with its preview, versions, tags and **Timeline** (2026-10-17); **Share** > **Create share link** > **Create link**, and the link opened without an account (2026-10-18). The dialog's text suggests a password, an expiry date or an access limit, which it does not offer (XTRAK-2592).

Not observed: an upload failure in the **Explorer** (the source shows no error message for it).

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Search documents

Use this journey to find a document by its name, its content, or a phrase that includes a date.

Before you start

You have a company administrator or technical profile. Search covers the text extracted from documents when they were uploaded.

Steps

1. Type in the search box at the top of the Document Center (*Search processes and documents*) and press **Enter**. From the **Dashboard**, **Search documents** opens the same page. **Search documents** opens and runs the search.
2. To search again, type in the box on the page (*Try: RG sent today, contracts this month...*) and select **Search**.
3. To limit by date, write the period in plain words with the rest of the search. The page shows how it read your phrase under **Understood as:**, for example "contracts" and **This month**.

You write (English or Portuguese)	Period
<i>today / hoje</i>	Today
<i>yesterday / ontem</i>	Yesterday
<i>this week / esta semana</i>	From Monday to now
<i>this month / este mês</i>	This month
<i>this year / este ano</i>	This year
<i>last 30 days / últimos 30 dias</i>	The last N days (up to 999)

4. (*Optional*) Under **Filters**, select a value to narrow the results; select it again to remove it.

5. Select a result to open its **Document details**.

Expected result

Each result shows the document name, its file type (for example **PDF**), the matching passage with the words highlighted, its date and its relevance score.

How to confirm it worked

The document you expected is in the list, and the **Understood as:** line shows the text and period you meant.

If something goes wrong

What you see	What it means	What to do
<i>No results.</i>	Nothing matched the text and period	Remove the period or a filter, or use fewer words.
Understood as: shows no period	The date phrase was not recognized	Use one of the phrases in the table above.

Known limitations

- The box at the top says *processes and documents*, but the results are documents only. To find a process, use **Processes** (see [Follow a process](#)).

Observed on 2026-10-18 in DEV: a word in the names of synthetic documents returned them with **Understood as:**, the filters **MIME**, **Status**, **Confidentiality** and tag keys, and a document uploaded minutes before.

Not observed: how the relevance score is computed, and whether text inside scanned images is searchable.

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Document Center

administration screens

Detailed reference for the Document Center screens managed by company administrator and technical profiles. Labels are quoted as they appear in the English interface. Content was read from the source of the build serving DEV on 2026-10-09 (Document Center interface `f3b92b7` , service `bb1cb28`); on 2026-10-17 the *Inbox*, the *Link to a process* dialog, the *Explorer* and *Document details* were observed in DEV with a synthetic company administrator (Document Center interface `7c2a77e` , service `cfb72ae`), and on 2026-10-18 *My Drive*, the process type page, *Processes*, *Process details*, *Search documents* and the **Share** button (Document Center interface `44d2f38` , service `6fd4193`). Every screen below says **Observed**.

Screenshots are not included in this edition. The **Dashboard** and the **Upload document** dialog are described in the user manual's *Document Center screens*.

My Drive

How to get here	Menu My Drive
Who sees it	Company administrator and technical profiles
Content status	Observed (2026-10-18; on 2026-10-17 a profile without administrator access that opened it by address got <i>This page cannot be opened</i> , although the side menu still showed My Drive)

Card	Content	Opens
Inbox	<i>Documents awaiting triage</i> and the count; highlighted when not empty	Inbox

Card	Content	Opens
One per process type	Type name, <i>n processes</i> , and <i>n awaiting review</i> or <i>n in progress</i> ; Pin / Unpin	Process type page
Archived / Loose files	<i>Documents without a process</i>	Explorer

Pinned types come first; pins are kept in your browser only. The side menu lists the same process types under **My Drive**.

State	How it looks
Loading	<i>Loading your drive...</i>
No process yet	<i>No processes yet — Processes captured from your forms will appear here</i>
Error	<i>Could not load your drive with Retry</i>

Process type page

How to get here	My Drive › a process type card, or the type under My Drive in the side menu
Content status	Observed (2026-10-18, card selected and the page opened by its own address)

Header: the type name, *Recent processes*, **View all** (opens **Processes** filtered by the type) and **Back to My Drive**. Up to 10 process cards, newest first: name, status, requester, identifier, age (*just now*, *h*, *d*, tinted when an open process gets old), number of documents and checklist progress. Empty: *No processes of this type yet*.

Processes

How to get here	View all on a process type page
Content status	Observed (2026-10-18, list and status filter)

Element	What it does
<i>Search requester or identifier...</i>	Text filter
All statuses	Status filter: <i>New, Processing, Awaiting review, Awaiting requester correction, Completed, Rejected</i>
Filter	Applies the filters
Previous / Next, <i>Page n of m</i>	25 processes per page

Column	Content
Flow	Form or workflow name (or the source: Portal, Workflow, API, ECM) and received date
Subject	Process name
Requester	Name and e-mail
Identifier	Process identifier
Docs	Number of documents
Status	Status badge

Selecting a row opens **Process details**. Empty: *No processes yet*. Error: *Could not load processes*. with **Try again**.

Process details

How to get here	A process card or a row in Processes
Content status	Observed (2026-10-18, a <i>Completed</i> process from a Portal form, every view opened, also by the page's own address)
Changes data?	No. Every view is read-only.

Area	Content
Header	Process name, checklist ring (received / expected), status
Summary	Requester, Identifier, Workflow, Received, Source
Left	Document thumbnails and the preview of the selected document (<i>Preview unavailable</i> when it cannot be shown)
Right	Icon bar; hover an icon for its name

View	Content	Empty / error
Extracted data	Fields read from the selected document, under its document type	<i>No extracted data yet for this process.</i>
Checklist	Expected documents: ✓ received, ○ Pending or Optional ; Form answers	<i>This process has no checklist.</i>
Generated	Documents produced by the workflow: Open in the viewer, Download	<i>This process has not produced any documents yet; Download failed</i>
Timeline	Correction history (Round, Reasons, Channel, Notification outcome: Sent,	<i>No correction cycles recorded;</i>

View	Content	Empty / error
	<i>Suppressed, No channel</i>) and the process events	<i>No events yet.</i>
Cross-check	All agreed or Needs a look ; per check Match, Divergence, Inconclusive or Not applicable ; AI marks checks made by AI	<i>No cross-check ran on this case.</i>
Workflow	Outcome (Approved, Refused, Returned to requester), who and when, <i>n approved · m refused</i> ; workflow name and status; phases (Classification, Extraction, Crops, Split, Human review, Delivery, Condition) with status and error	<i>No workflow run linked to this process yet.</i>
Audit	Human decisions; Immutable log (Event, When, Actor, IP, Document, Hash) — <i>every event is hash-chained, so tampering is detectable</i>	<i>No decision has been recorded for this case.; No audit events yet.</i>
Versions	Each document's versions, Current, Signed, Download	<i>No documents in this process.</i>
Integrations, Comments	Placeholder	<i>This view arrives in a later phase.</i>

When a reviewer reserved a document without deciding, the decision trail shows *reserved by* When the process has decisions from before the trail started, it says so and those decisions are missing.

Inbox

How to get here	My Drive › Inbox

Content status	Observed (2026-10-17, Upload loose file and Link to a process ; Archive and Discard not walked)

Element	What it does	Reversible?
Upload loose file	Adds one file to the Inbox (origin Upload)	—
Link	Opens Link to a process	Not from the interface
Archive	Removes from the Inbox; status <i>Archived</i> ; stays in its folder	Not from the interface
Discard	<i>After Discard document? — This permanently removes the document,</i> deletes it	No

Rows: origin (**Email**, **Upload**, **API**), name, **Received**. Lists the 50 most recent. Empty: *Nothing to triage*. Error: *Could not load the inbox* with **Retry**. A file added with **Upload loose file** appears in the list only after the page is reloaded.

Link to a process dialog

Section	Content
Suggested	Processes matching identifiers or e-mail read from the document, with by ID or by email ; <i>No automatic suggestion</i> when none
Search process	<i>Name, requester or identifier</i> ; up to 10 results; <i>No process found</i>
Link	Moves the document into the process; shows Linking...
Cancel / Esc	Closes without linking

Observed on 2026-10-17 (suggestions and search); no document was linked.

Explorer

How to get here	My Drive › Archived / Loose files , or Dashboard › Browse folders or Public shares
Content status	Observed (2026-10-17, folder created, PDF uploaded, document opened)

Element	What it does
Folder tree	/ (root) and folders, each with a count; ► opens a folder
Folder name, Create	Creates a folder under the selected folder (or the root). The tree shows it after a reload. Selecting Create again with the same name creates a second folder with that name.
Drop files here or click to choose	Uploads files into the selected folder; disabled with <i>Select a folder before uploading files.</i> until one is selected
Document cards	Name and status (<i>Draft, Review, Published, Archived, Purged</i>); open Document details

States: *Loading documents...*, *No documents in this folder.*, *We couldn't load documents for this folder.* with **Try again**.

Document details

How to get here	A document in Explorer or in search results
Content status	Observed (2026-10-17, preview, Details , versions, tags and Timeline ; 2026-10-18, Share)

Area	Content
Header	Name; <i>Status: ... · Confidentiality: ... (Public, Internal, Confidential, HighlyConfidential)</i> ; Share
Preview	Current version: PDF page by page, PNG and JPG. Others: <i>Preview not supported for this file type.</i>
Details	Status and confidentiality badges; AI panel (Document type, Confidence %, Fraud: Possible fraud / No fraud detected) ; Versions (vN , file name, size, ✓ <i>signed</i>); Tags
Timeline	Document events with their count, for example <i>Document created, Version uploaded, Viewed, Downloaded, Moved, Shared, Status changed, Signed, Archived</i>

Element	What it does	Reversible?
Share	Opens Create share link : an optional Recipient email for records (kept for your records and audit; it does not restrict who can open the link), Cancel and Create link . Create link creates the link (download allowed; no password, expiry or access limit), copies it and shows Link copied to clipboard with the link, Copy again and Dismiss	No — links cannot be revoked from the interface

The dialog text suggests a password, an expiry date or a maximum number of accesses to limit access, but it offers none of them (XTRAK-2592).

Search documents

How to get here	The search box at the top (<i>Search processes and documents</i>), or Dashboard › Search documents
Content status	Observed (2026-10-18, a word in the names of synthetic documents)

Element	Content
Search box	<i>Try: RG sent today, contracts this month...; Search</i>
Understood as:	How the phrase was read: the text in quotes and the period (Today, Yesterday, This week, This month, This year, Last n days)
Filters	Values to narrow the results, each with its count: MIME (file type), Status, Confidentiality and tag keys
Result	Name, file type, highlighted passage, date, <i>score</i>

Before searching: *Search by name, content or a phrase like "invoices this week". No match: No results.*

Not observed (all screens): what another profile sees when it opens the addresses behind *My Drive* other than *My Drive* itself; the display of a **Failed** process; **Archive** and **Discard** in the *Inbox*.

Last reviewed 2026-10-18 · Version 1.0.0 · Owner: product-documentation

Chapter versions

Chapter	Version	Last reviewed
Start here	0.1.0	2026-10-16
Manage members and profiles	0.1.0	2026-10-08
Portal journey languages	0.2.0	2026-10-18
Workflow administration overview	1.0.0	2026-10-09
Design and publish a workflow	1.0.1	2026-10-09
Organize human review	1.0.0	2026-10-09
Validate digital signatures	1.0.0	2026-10-09
Connect your systems	1.0.0	2026-10-09
Workflow administration screens	1.0.0	2026-10-09
Document Center administration overview	1.0.0	2026-10-18
Triage the Inbox	1.0.0	2026-10-17
Follow a process	1.0.0	2026-10-18
Organize and share documents	1.0.0	2026-10-18
Search documents	1.0.0	2026-10-18
Document Center administration screens	1.0.0	2026-10-18