

Cogneris User Manual

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Start here

This manual has one part per Cogneris product (a *satellite*), after the chapters every user shares. This page lists the parts and the journeys that cross more than one product. It only routes you: the steps of each product live in that product's part.

Manuals in this edition

Manual	Start at	Chapters	Version	Oldest review	Owner
Getting started	Sign in	5	0.1.0 – 0.1.1	2026-10-08	product-documentation
Portal	Portal overview	7	0.1.0 – 0.4.0	2026-10-09	product-documentation
Workflow	Workflow overview	5	1.0.1 – 1.1.0	2026-10-09	product-documentation
Sign	Sign overview	5	1.0.0	2026-10-09	product-documentation
Document Center	Document Center overview	4	1.0.0	2026-10-18	product-documentation

Manual edition 2026.10.1. Generated from manual.json and each chapter's front matter.

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.

Shared topics — [sign-in](#), [multi-factor authentication](#), [your team](#), [profiles](#) and [billing](#) — are described once, in *Getting started*. Product parts link to them and never repeat them.

Journeys across products

A document can pass through several products. Which ones depends on how your company set up its Portal forms and its workflows; a product your company did not configure is simply skipped.

Journey	Products, in order	Start here if you
<u>Collect and review documents</u>	Portal → Document Center (ECM) → Workflow → back to Portal when a correction is needed	invite people to send documents, or review what they sent
<u>Sign and file a document</u>	Workflow → Sign → Workflow → Document Center (ECM)	run workflows that produce a document someone must sign

The two journeys connect: a workflow fed by the Portal can continue, after review, into a signature phase. The full chain is then Portal → Document Center → Workflow → Sign → Workflow → Document Center.

How the journeys are written

- Each step names the product, who acts and what is handed to the next product, then links to the chapter that holds the instructions.
- **Optional** marks a step that happens only when your company configured it.
- The hand-offs were described from the product source code on 2026-10-09. They were not yet walked end to end in a test environment; the product chapters they link to state what was observed.

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Collect and review documents

A person outside your company — the **requester** — sends documents through a Portal access link. Cogneris files them in the Document Center, runs them through a workflow and, when a reviewer rejects something, sends the request back to the requester to fix.

Products, in order: Portal → Document Center (ECM) → Workflow → Portal (only when a correction is needed).

This page only routes you between products. The instructions for each step are in the chapter it links to.

Before you start

- You are signed in with a profile that gives access to the products you act in.
- Your company has a Portal form. To reach Workflow, that form must be bound to a workflow: the form has a **Workflow** setting, and **None** means the documents are not forwarded. See Prepare a form.

Steps

#	Product	Who acts	What happens	Instructions
1	Portal	You	You send the requester an access link for a form.	<u>Send an access link</u>
2	Portal	Requester	The requester opens the link and submits the documents. The page confirms Documents Received! and the link moves to Docs Completed .	<u>Complete a document request</u>
3	Document Center	— (automatic)	Every submission is filed in the Document Center as a process ,	<u>Where the documents</u>

#	Product	Who acts	What happens	Instructions
			with its own folder. This happens whether or not the form is bound to a workflow.	come from
4	Workflow	— (automatic)	Optional: only when the form is bound to a workflow. The submission starts a run of that workflow.	Workflow overview
5	Workflow	Reviewer	Optional: only when the workflow has a Manual Review phase. The documents wait in a review queue until every one has a decision.	Review a document
6	Workflow	Reviewer	Optional: only when at least one document is rejected. The process is returned to the requester and listed under Awaiting requester correction .	Return a document for correction
7	Portal	Requester	The requester receives a new link through the same channel — the earlier link stops working — and resends only the documents marked Resend , each with the reviewer's reason.	Correction round
8	Workflow	Reviewer	The resent documents return to the same process for review; the round number is shown as Returned submission round . Continue from step 5.	Track a document's state and routing

When every document is approved, the process continues to the next phase of its workflow. If that workflow asks for a signature, continue with [Sign and file a document](#).

Expected result

- The requester's documents are filed in the Document Center, as one process with its own folder.
- If the form is bound to a workflow, the process appears on the Workflow **Runs** page and moves through its phases.
- A returned process goes back to the requester and, once resent, comes back to the same process — not to a new one.

How to confirm it worked

- In Workflow, follow the process as described in [Track a document's state and routing](#).
- In Portal, follow the link's status as described in [Follow up an access link](#).
- The requester does **not** see the workflow's progress in the Portal; after submitting they only see the confirmation, and later a correction request if one is needed.

If something goes wrong

What you see	What it means	What to do
The requester submitted, but no run appears in Workflow	The form is not bound to a workflow (Workflow set to None), so nothing was forwarded	Bind the form to a workflow; see Prepare a form . Documents already submitted are still in the Document Center.
A rejected process ends as failed instead of being returned	It was started inside Workflow, not from the Portal, so it has no requester	See Return a document for correction .
A process is not returned again after several corrections	Your company's correction policy limits the number of correction rounds; when the limit is reached the process is escalated instead of returned	Ask your company administrator.

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Sign and file a document

A workflow produces a document, asks someone to sign it through Sign, waits for the answer and then continues with the signed copy, which is filed in the Document Center (ECM).

Products, in order: Workflow → Sign → Workflow → Document Center (ECM).

This page only routes you between products. The instructions for each step are in the chapter it links to.

Before you start

- The workflow was set up by your company administrator with a **Generate document** phase followed by a **Signature** phase. Without a **Signature** phase this journey does not happen; the whole journey is optional.
- The **Signature** phase has the signer's name and contact, the channel (e-mail, SMS or WhatsApp) and, optionally, an expiry and a reminder.
- You are signed in with a profile that gives access to Workflow, and to Sign if you want to follow the envelope there. The signer needs no Cogneris account.

Steps

#	Product	Who acts	What happens	Instructions
1	Workflow	— (automatic)	The run reaches Generate document and produces the document to sign.	<u>Track a document's state and routing</u>
2	Workflow → Sign	— (automatic)	The run reaches Signature : Workflow creates the signature request in Sign and the run waits . In Sign, the request is grouped in a case — one case per workflow run.	<u>Follow a case raised by Workflow</u>

#	Product	Who acts	What happens	Instructions
3	Sign	Signer	The signer receives a personal link on the configured channel, confirms their identity with a one-time code and signs — or declines, giving a reason.	Sign or decline a document
4	Workflow	— (automatic)	Workflow checks Sign for an answer at a regular interval (every two minutes by default), so the run resumes a few minutes after the signer answers, not instantly.	Track a document's state and routing
5	Workflow	— (automatic)	When signed, the run continues with the signed copy: a later phase that sends the document sends the signed one.	Workflow overview
6	Document Center	— (automatic)	Optional: only when the process's documents are in the Document Center — for example, it came from the Portal. The signed PDF is filed as a new version of the generated document, and the signature audit trail is filed beside it. The version list marks the signed version Signed .	Where the documents come from

Expected result

- The run passes the **Signature** phase and continues to its next phase with the signed document.
- The signature is counted once, when the document is signed; see [Billing and usage](#).
- For a process kept in the Document Center, the document gains a signed version and an audit trail document.

How to confirm it worked

- On the Workflow **Runs** page, the **Signature** column of the run shows the phase completed; **Run detail** shows the step as *Completed*. See [Track a document's state and routing](#).

If something goes wrong

What you see	What it means	What to do
The run stays waiting at Signature	The signer has not answered yet, or the answer has not been picked up yet (up to a few minutes)	Wait a few minutes. If the signer has not signed, a reminder can be sent from Sign; see Send a reminder .
Run detail shows an Error starting with <i>signature_refused</i>	The signer declined	The run ended as failed. Start a new process once the reason is resolved.
Run detail shows an Error starting with <i>signature_expired</i>	The request reached its expiry before the signer signed	The run ended as failed. Start a new process.
The run fails at Signature right away	The phase is missing the signer's name, e-mail or phone, or there is no Generate document phase before it	Ask your company administrator to correct the workflow.
A document signed directly in Sign is not in the Document Center	Only signatures requested by a workflow are filed in the Document Center	Expected. Envelopes created in Sign itself are kept in Sign; see Sign overview .

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Sign in

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 of the sign-in surface).

Canonical home of sign-in for every satellite manual. Satellite chapters link here instead of describing sign-in.

Before you start

Pending.

Steps

Pending.

Expected result

Pending.

If something goes wrong

Pending.

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Multi-factor authentication

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 of the sign-in surface).

Canonical home of multi-factor authentication for every satellite manual.

Before you start

Pending.

Set up a second factor

Pending.

Sign in with a second factor

Pending.

If something goes wrong

Pending.

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Your team

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 of the team surface).

Canonical home of team membership, as seen by a user. Managing members is in the [administrator manual](#).

What your team is

Pending.

Join a team

Pending.

Leave a team

Pending.

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Profiles and what they allow

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 of profiles and permissions).

Canonical home of profiles. Each satellite chapter states which profile a journey needs and links here.

What a profile is

Pending.

See your profile

Pending.

Ask for a different profile

Pending.

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Billing and usage

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 of the billing surface).

Canonical home of billing and usage for every satellite manual.

What is billed

Pending.

See your usage

Pending.

If something goes wrong

Pending.

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Portal overview

Portal collects information and documents from people outside your company. You design a **form** that says what to ask and which documents to request, then send a person an **access link**. That person opens the link, fills in the form and captures or uploads the documents — without a Cogneris account. People who **prepare forms and send links** use Portal after they [sign in](#) to Cogneris.

What Portal does

- A **form** has a name, a description, the questions the person answers, and its **document requests** — one per document to collect, such as an identity document or a proof of address. A form can be bound to a **workflow**: what the person submits is then forwarded to that workflow for review.
- An **access link** (called *Magic Link* on some screens) is a personal link to one form for one person. You can have Portal send it by e-mail, SMS or WhatsApp, or copy it and share it yourself. It has an expiry date and, optionally, a maximum number of accesses.
- The person who receives the link — the **recipient** — answers the form, captures or uploads each requested document and confirms. Portal then stores the documents in the [Document Center](#) and, when the form is bound to a workflow, starts a process there. See the [Workflow overview](#).
- If a reviewer in Workflow rejects a document, Portal reopens the link and sends the recipient a new one. The recipient resends only the rejected document. See [Return a document for correction](#) for the reviewer's side.

Who uses it

You want to	What you need	Where
Create or change a form and its document requests	The administrator or technical team profile	Prepare a form
Send an access link to a person	Same as above	Send an access link

You want to	What you need	Where
See where a link is, send it again or cancel it	Same as above	Follow up an access link
Answer a request you received	Only the link	Complete a document request
Ask your company's support team for help	Any profile with access to Portal	Ask your company for support
See link activity at a glance	Any profile with access to Portal	Portal screens — Dashboard

Every person with access to Portal sees the **Dashboard**. **My Forms**, **Preview** and **Access Links** are meant for the **administrator** and **technical team** profiles: the menu hides them for other profiles, and Portal refuses their actions to anyone else. If an item described here is missing from your menu, your profile does not include it; ask your company administrator, see [Profiles](#).

Everyone with access to Portal sees every form and every access link of the company, not only the ones they created.

Access link status

Status	Meaning
Created	The link exists and was not sent by Portal — you chose <i>None (create without sending)</i> , or the send failed.
Sent	Portal delivered the link by e-mail, SMS or WhatsApp.
Accessed	The recipient opened the link.
Form Completed	The recipient submitted the form; documents are still to come.

Status	Meaning
Docs Completed	The recipient confirmed the documents. They were stored and, if the form has a workflow, forwarded to it.
Revoked	You cancelled the link. It no longer opens.
Expired	The expiry date passed before the recipient finished. The link no longer opens.
Pending, Finished	Offered by the status filter. No action described in this manual moves a link to these statuses today.
?	The link was returned for correction by a reviewer and is waiting for the recipient. See Known limitations .

Journeys in this part

1. [Prepare a form](#) — create a form with the assisted wizard, adjust its questions and document requests, bind it to a workflow and try it.
2. [Send an access link](#) — create a link for a person and deliver it.
3. [Complete a document request](#) — what the recipient does after opening the link, including a correction round.
4. [Follow up an access link](#) — find a link, see its access history, send it again, cancel or delete it, and manage WhatsApp consents.

Screens in this part

The [Portal screens](#) chapter describes each screen: the *Dashboard*, *Company insights*, *My Forms*, the form wizard, the form editor, *Preview*, the *Magic Links* list, the *Create New Magic Link* dialog, the link details page, *WhatsApp consents*, *Journey languages*, *My support requests* and the recipient's page.

Known limitations

- **The link is shown only once.** Portal keeps only a fingerprint of the link, so the full address appears only in the *Generated Link!* dialog right after you create it. Copy it there if you intend to share it yourself. The copy buttons on the list and the *Public Link* card on the details page do not appear for a saved link.

- **Resend replaces the link.** Each **Resend** sends a new link; the one sent before stops working.
 - **A link returned for correction shows  as its status** in the list, and the status filter has no option for it. Open the link's details to see its accesses.
 - **The form editor does not open today** (XTRAK-2594). *Edit Metadata* on *My Forms*, and **Create Form** at the end of the wizard, leave the content area blank. The wizard still creates the form, and **Workflow** on the form's row still binds it to a workflow.
 - **Form analytics are not connected.** The *Form Analytics* area of the Dashboard shows — in every card until it is.
 - The recipient's page reads *You received an invitation to submit documents for the process: Submit Documents* — it does not show the form's name.
-

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Prepare a form

Use this journey to create the form an access link points to: the questions the recipient answers and the documents they must send.

Before you start

- You are signed in with the **administrator** or **technical team** profile, and **Forms › My Forms** appears in the Portal menu. If it does not, see [Profiles](#).
- If the documents must be reviewed, the workflow that reviews them exists in Workflow. You choose it in step 9.

Steps

Create the form with the wizard

1. In the Portal menu, open **Forms › My Forms**. The **My Forms** page lists every form of your company.
2. Select **New Form**. The wizard opens with five steps: **Name, Description, Fields, Documents, Layout**.
3. **Name** — type a clear name in **Form Name** (up to 50 characters), for example *Supplier onboarding*. Select **Next**.
4. **Description** — Portal proposes a description written by AI from the name (*Generating description...*). Edit it as needed and select **Next**.
5. **Fields** — Portal proposes the form's sections and fields as text (*Suggested Sections & Fields*). Edit the text to add, rename or remove fields, then select **Next**.
6. **Documents** — Portal proposes the documents to request (*Required Documents*). Rename an item by editing it, remove it with its remove button, or select **Add document**. Select **Next**.
7. **Layout** — choose **Single Page** or **Multiple Steps**, then select **Create Form**. The button shows **Creating...** while Portal generates the form. The form editor opens on the new form.

Adjust the form in the editor

8. In the editor, the visual builder in the centre shows the form. Drag fields from the builder's palette to add them, select a field to change its label, type and validation, and

remove fields you do not need.

9. In the details panel on the side:

- **Name *** and **Description** — the form's name and description.
- **Workflow** — choose the workflow that receives what the recipient submits, or **None**. *Documents collected via this form are forwarded to this workflow after submission.*
- **Available in the mobile app** — when ticked, the form appears in your company's mobile app catalogue. New forms start ticked.

10. Under **Document Requests**, check the documents the wizard created. Select **+ Add** to add one, or the edit button on a row to change it. In the **Add Document Request** dialog:

- **Title *** — what the recipient sees, for example *Identity document* (up to 50 characters).
- **Description *** — a short instruction shown under the title.
- **Types Allowed *** — the kinds of document accepted for this request.
- **For Each *** — the name of a form field whose answers repeat the request: one document per value. Leave it empty to ask once.
- **Validation** — optional validation rule.
- **Optional** — tick it if the recipient may skip this document.

Select **Create** (or **Update**). Document requests are saved as soon as you select **Create** or **Update** — they do not wait for **Save Changes**.

11. Select **Save Changes**. The message *Changes saved!* confirms that the name, description, workflow, mobile setting and form design were saved.

Try the form

12. In the Portal menu, open **Forms › Preview**. The **Test forms** page shows one card per form.

13. Select the card of your form. Fill in the form as a recipient would and confirm it. The **Checklist** tab then lists one card per document request; use **Open Camera** or **Upload File** on each and check the result. The **JSON** tab shows the answers as data.

14. Select **Back to Tests** when you are done.

Expected result

- The form is listed in **My Forms** with its thumbnail, name and description.
- It can be chosen in the **Form** list when you send an access link.

How to confirm it worked

- Open the form again from **My Forms** (edit button on its row): the editor shows your fields, the chosen **Workflow** and every **Document Request**.
- In **Preview**, the **Checklist** tab shows the document requests you expect for the answers you gave.

Change or delete a form later

- **Edit** — select the edit button (*Edit Metadata*) on the form's row in **My Forms** to open the editor, then **Save Changes**. Links already sent show the changed form the next time they are opened, unless your company keeps a fixed copy for new links (see *Journey languages* in the Portal screens).
- **Bind to a workflow** — the **Workflow** button on the row opens a short dialog with the same **Workflow** choice; select **Save Changes**.
- **Delete** — the delete button on the row asks *Are you sure you want to delete this form? This action cannot be undone*. To delete several, tick their boxes and use **Delete** in the selection bar.
- **Export CSV** exports the list of forms.

If something goes wrong

What you see	What it means	What to do
<i>Error calling AI. Make sure prompt.form_description is configured... (or prompt.suggestion_fields, prompt.request_documents)</i>	The AI suggestion for this step is not configured for your company	Select Retry . If it persists, ask your company's technical team; you can also type the content yourself.
<i>Failed to generate form. Please try again. on the Layout step</i>	The form could not be generated from the suggestions	Select Retry , or go Back and simplify the Fields text.

What you see	What it means	What to do
<i>Name must be 50 characters or less.</i>	The name is too long	Shorten it and select Save Changes again.
<i>Failed to save changes.</i>	The form was not saved	Try again. If it persists, check that your profile allows managing forms.
The Add Document Request dialog stays open after Create	The request was not saved	Check that every field marked * is filled in, then select Create again.
<i>This form has no content correctly saved.</i> in Preview	The form has no saved design	Open it in the editor and select Save Changes .

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Send an access link

Use this journey to ask one person to fill in a form and send their documents.

Before you start

- You are signed in with the **administrator** or **technical team** profile, and **Send & Collect > Access Links** appears in the Portal menu.
- The form exists; see Prepare a form.
- You know how to reach the person: an **e-mail address** (up to 50 characters) for e-mail, or a **mobile phone number** for SMS and WhatsApp.
- For WhatsApp, the person must have agreed to receive WhatsApp messages from your company, and you must know where that agreement is recorded.

Steps

1. In the Portal menu, open **Send & Collect > Access Links**. The **Magic Links** page opens.
2. Select **Create Magic Link**. The **Create New Magic Link** dialog opens.
3. Fill in the dialog:
 - **Form *** — the form to send.
 - **Name *** — the person's name, for example *John Smith*. It identifies the link in the list.
 - **CPF / Tax ID** — optional.
 - **Deadline (days)** — how many days the link stays valid, from 1 to 365. Default: 30.
 - **Email** and **Mobile Phone** — how to reach the person.
 - **Sending Channel** — **Email**, **SMS**, **WhatsApp**, or **None (create without sending)** if you will share the link yourself.
 - **Journey language** — shown only when your company offers more than one language to recipients. **Tenant default** lets the recipient's preference and your company's default decide.
 - **Max. Accesses** — how many times the link can be opened; leave empty for **Unlimited**. Tick **Single use** to allow one access only.
 - **Notes** — internal notes; the recipient does not see them.
4. If you chose **WhatsApp**, Portal checks the number (*Checking consent for this number..*):
 - *Consent for this number is already on file.* — nothing else to do.

- *This recipient asked to stop receiving WhatsApp messages. Use another channel.* — choose another channel.
- Otherwise, record the consent: tick *I confirm this recipient authorised receiving WhatsApp messages from us*, choose **How was it collected?** (**Web form**, **Contract**, **In person** or **Import**), set the **Consent date**, and say in **Where is the proof?** where the evidence is, for example *contract 4471*.

5. Select **Create Magic Link**. The button shows **Saving...** while the link is created and sent.

Expected result

- The dialog changes to **Generated Link!** with *Magic Link created successfully!*, the full link under **Generated link:** with a **Copy** button, and a **QR Code** to open the link on a phone.
- If you chose a channel, Portal sent the link to the person, and the link's status is **Sent**. With **None**, the status is **Created**.

Copy the link now if you will share it yourself. This is the only time Portal shows it; afterwards you can only send a new one (see [Follow up an access link](#)).

How to confirm it worked

- Select **Close**. The link appears in the **Magic Links** list with the form, the creation date, the channel and its status.
- Select its name to open the details: **Sending** shows the **Channel** and **Sent at**.

If something goes wrong

What you see	What it means	What to do
<i>Form and Name are required fields.</i>	A required field is empty	Choose the form and type the name.
<i>Email address must be 50 characters or fewer.</i>	The e-mail address is too long	Use a shorter address, or another channel.
<i>Record the consent before sending on WhatsApp.</i>	WhatsApp needs a recorded consent	Complete the consent fields (step 4), or choose another channel.

What you see	What it means	What to do
<i>This number opted out of WhatsApp. Choose another channel.</i>	The person asked to stop WhatsApp messages	Use Email or SMS .
<i>Magic Link created, but sending failed. Copy the link below or try resending.</i>	The link exists but the message did not reach the person	Copy the link from the dialog and send it yourself, or <u>send it again</u> later.
<i>Failed to create Magic Link.</i>	The link was not created — for example, your company reached its usage limit, or your profile does not allow it	Try again; if it persists, ask your company administrator.
<i>Failed to load form options.</i>	The list of forms could not be loaded	Close the dialog and open it again.

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Complete a document request

Use this journey when you received an access link asking you to fill in a form and send documents. You do not need a Cogneris account.

Before you start

- You have the message (e-mail, SMS or WhatsApp) or the QR code with your **personal link**. Do not forward it: the link is yours, and it may allow a limited number of accesses.
- Have your documents at hand. You can photograph them with your device's camera or upload files: **PDF, JPEG or PNG, up to 15 MB each**.
- A device with a camera is recommended — some requests, such as a selfie, accept only the camera.

Steps

1. Open the link. The **Document Portal** page shows *Verifying link...* and then the request. The side of the page shows your **Progress** (*Verifying link...*, **Fill Form**, **Submit Documents**, **Documents Received!**), the **Security** notes (**Protected link**, **No account required**, **Limited access**) and the **Context**: the expiry date and the **Process ID**.
2. If the page offers a **Journey language** selector, choose your language.
3. **Fill Form** — *Please fill in the form below before submitting your documents*. Answer the questions. Your answers are saved as you type: if you close the page, the link brings you back to them. When done, select **Submit** (or the form's own last button).
4. **Submit Documents** — the page lists one card per requested document, with its title and instructions. For each document:
 - Select **Open Document Camera** and photograph the document, or
 - Select **Upload File** and choose the file.

Portal checks the image (*Analysing document quality...*). If the quality is not ideal, it asks whether to retake: choose **Yes** to retake or **No** to keep it. If the quality is too low, select

OK and take the photo again — a low-quality image cannot be sent. A captured document is marked done. Use **Retake** to replace it or **Delete** to remove it.

5. When every required document is captured, select **Confirm**. The button shows **Submitting....**

Correction round

If a reviewer could not accept one of your documents, you receive a **new link** through the same channel. The link you had before stops working.

1. Open the new link. The status reads **Correction needed:** *We reviewed your documents. Only the item(s) below need to be resent — everything else is already approved.*
2. The documents to send again are marked **Resend**, with the reviewer's **Reason:**. The others are marked **Already approved** and cannot be changed.
3. Capture or upload each document marked **Resend**, then select **Resend document**.

Expected result

- The page shows **Documents Received!** — *Your documents have been submitted successfully. You will receive a confirmation shortly.* You can close the page.
- Opening the link again shows the same confirmation.

How to confirm it worked

- The last step of the progress, **Documents Received!**, is marked done.
- The company that sent you the link sees your request as **Docs Completed**.

If something goes wrong

What you see	What it means	What to do
Link Expired	The request passed its expiry date	Contact whoever sent you the link to ask for a new one.
Link Cancelled	The sender cancelled the link	Contact the sender.
Access Limit Reached	The link was opened as many times as allowed	Contact the sender for a new link.

What you see	What it means	What to do
Link Not Found	The link is incomplete, or it was replaced by a newer link sent to you	Use the most recent message you received, and open the link without editing it; otherwise contact the sender.
Unable to Verify Link	Portal could not check the link right now, or your connection failed	Select Try again after a moment and check your connection.
<i>Could not submit the form. Your answers are still here. Please try again.</i>	The form was not sent	Select Submit again.
<i>Document capture failed. Please try again.</i>	The photo or file was not received	Capture or upload it again. Check that the file is PDF, JPEG or PNG and up to 15 MB.
Confirm does nothing	A required document is missing, still uploading, or its image quality is too low	Check every card: each required document must be marked done, without a low-quality warning.
<i>Could not finalize your submission. Please try again.</i>	Your documents were not all stored	Select Confirm again.

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Follow up an access link

Use this journey to see where a request stands, send the link again, cancel it, and keep WhatsApp consents in order.

Before you start

- You are signed in with the **administrator** or **technical team** profile, and **Send & Collect > Access Links** appears in the Portal menu.
- The link was created; see Send an access link.

Steps

Find a link and see where it stands

1. Open **Send & Collect > Access Links**. The **Magic Links** page lists every link of your company, 10 per page (**Previous** / **Next**).
2. Narrow the list with the filters: **Name** (*Search by name...*), **Form** (or **All Forms**), **Start Date** and **End Date** (creation date), and **Status**. Select a column header to sort by it.
3. Read the row: name and e-mail, form, **Created at**, **Last Access**, **Accesses**, **Channel** and **Status**. The statuses are explained in the Portal overview.
4. Select the name to open the link's details:
 - **Recipient** — name, CPF, e-mail and phone.
 - **Access Data** — **Created at**, **Expires at**, **First access**, **Last access** and **Total accesses** (with the maximum, when set).
 - **Sending** — **Channel**, **Sent at** and your **Notes**.
 - **Access Log** — every recorded event, with **Date/Time**, **IP**, **Action** (**View**, **Resend**, **Revoke**; *reject-notify* when the recipient was asked to correct documents) and **User-Agent**. IP addresses and browser details are recorded masked. Uploads are not listed here.
5. Select **Back** to return to the list with your filters.

When the recipient confirms the documents, the status becomes **Docs Completed**. If the form is bound to a workflow, the review continues there: see Track a document's state and routing.

Send the link again

Use this when the person did not receive the link, lost it, or needs it on another channel. Each resend creates a **new** link: the previous one stops working.

1. On the list, select the resend button on the row; or, on the details page, select **Resend**.
The button is not offered for a **Revoked** link, nor on the details page of an expired one.
2. In **Resend Magic Link**, choose the **Sending Channel: Email, SMS or WhatsApp**.
3. Select **Resend** (on the list) or **Confirm** (on the details page). *Resent successfully!* confirms that the new link was delivered, and **Sent at** shows the new time.

Cancel a link

1. On the list, select the revoke button on the row; or, on the details page, select **Revoke**.
2. Confirm. The list asks *Revoke the Magic Link for "..."? This action cannot be undone.*; the details page asks *Revoke this Magic Link? It can no longer be accessed. Magic Link revoked successfully.* confirms it. The status becomes **Revoked**, and the row keeps only the delete button. A recipient who had already opened the link sees **Link Cancelled**; so does one who opens it for the first time.

Revoking cannot be undone. To ask the same person again, [create a new link](#).

Delete a link

1. On the list, select the delete button on the row.
2. Confirm *Are you sure you want to delete this Magic Link?. Magic Link deleted.* confirms it, and the link leaves the list.

Manage WhatsApp consents

1. On the **Magic Links** page, select **WhatsApp consents** (shown only to company administrators). The page lists who authorised your company to message them on WhatsApp, and where the proof lives.
2. Search by number, proof or who recorded it, and filter by **Status: Granted or Revoked**.
A number marked **Opted out** asked to stop receiving messages — *The recipient asked to stop — support only*.
3. To stop messaging a number, select **Revoke** on its row and confirm *Stop sending WhatsApp messages to ...?*
4. To record many consents at once, select **Import CSV** and choose a file with the columns
`phone,source,evidenceText[,collectedWhen]`, numbers in international format (for example `+5561999990000`). Fill `collectedWhen` with the date the consent was given; without it, the consent date is the import date.

Ask for support about a request

Where support requests are available, the details page offers **Request support about this process**, which opens a new support request linked to this link; see [Ask your company for support](#).

Expected result

You know the status of each request, and every person who still has to answer holds a working link — or their link is cancelled.

How to confirm it worked

- After a resend: the **Access Log** shows a new **Resend** entry.
- After revoking: the status is **Revoked** and the resend and revoke buttons are gone.

If something goes wrong

What you see	What it means	What to do
<i>Error loading Magic Links.</i>	The list could not be loaded	Reload the page.
<i>No magic links found for the selected filters.</i>	No link matches	Clear the filters or widen the dates.
A Portuguese message such as <i>Não é possível reenviar um link expirado.</i> after Resend	The resend was refused: the link expired (<i>expirado</i>) or was revoked (<i>revogado</i>)	Create a new link .
<i>Não há consentimento de WhatsApp registado para este número... or ...pediu para não receber mais mensagens no WhatsApp...</i>	WhatsApp cannot be used for this number: no consent on file, or the person opted out	Resend by Email or SMS , or record the consent in WhatsApp consents first.
<i>Falha ao enviar. Verifique o canal e os dados de contato.</i>	The message could not be delivered	Check the e-mail address or phone number on the

What you see	What it means	What to do
		link; if it is wrong, create a new link with the right contact.
<i>Error revoking. or Error deleting Magic Link.</i>	The action was not done	Try again; if it persists, check that your profile allows managing links.
<i>Token unavailable.</i>	The full link is no longer available to copy	Use Resend to send a new link.

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Ask your company for support

Use this journey to ask your company's support team for help from inside Portal and to follow the replies. A request can be about a specific process (an access link) or about anything else.

Before you start

- You are signed in. Any profile with access to Portal can open support requests; no administrator profile is needed.
- **Support** appears in the Portal menu. It appears only where support requests are reachable for your company.
- Your company has support requests turned on. If it has not, **Support** opens a page that says *Support requests are not available for your organization yet*. Ask your company administrator.

Steps

Open a request

1. Select **Support** in the Portal menu. The **My support requests** page lists the requests you opened, with their status and the date of the last update. With none yet, it says *You have not opened any requests yet*.
2. Select **New request**. The **New support request** page opens.
3. Fill in:
 - **Subject** — required.
 - **Process reference** (*optional*) — the number of the process the request is about. Leave it empty if the request is not about a specific process. From a link's details page, **Request support about this process** opens this page with the field already filled; see [Follow up an access link](#).
 - **Category** — shown only when your company set up categories; it may be required.
 - **Description** — required. *Do not include passwords or document numbers*.
4. Select **Send request**. The request opens on its own page, with its reference (for example *Request P-1*) and status **Open**.

If the page says *New requests are not available for your organization right now. You can still follow your existing requests.*, your company has paused new requests. The requests you already opened stay listed and you can still reply to them.

Follow a request and reply

1. On **My support requests**, select a request.
2. Read **Status**, **Opened** and **Last update**, and the **Conversation**. Until the support team answers, it shows *No replies yet*.
3. To add information, type in **Your reply** and select **Send reply**.

A request the support team marked as **Resolved** reopens when you reply. A **Closed** request cannot receive replies; open a new request instead.

What happens next

Your company's support team receives the request and answers in the conversation. The status moves through **Open**, **In progress**, **Waiting for your reply**, **Resolved** and **Closed**.

Content status

Observed in DEV on 2026-10-18 by a company administrator of a synthetic company, inside the Cogneris Platform and on Portal's own address (Portal interface `542dc84`, support service `3345d31`): the list empty and with requests, a new request sent, its page with *No replies yet*, and the page shown when new requests are paused. Not observed: a reply from the support team as seen by you, and **Category**, which the synthetic company did not set up (described from the Portal interface source).

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Portal screens

Detailed reference for each Portal screen used by the journeys. Labels are quoted exactly as they appear in the English interface; some screens say *Magic Link* where the menu says *Access Links* — both name the same thing. Content was checked on 2026-10-09 against the Portal interface source (`portal-fe 2563ceb`) and the Portal service (`portal-be 9dae623`). On 2026-10-17 the *Dashboard* and the *Recipient's page* were observed in DEV, inside the Cogneris Platform, with a synthetic company and synthetic profiles (Portal interface `25579b8` , service `44dbea1`); their *Content status* says **Observed**. On 2026-10-18 *My Forms*, the form wizard, *Magic Links*, the *Create New Magic Link* dialog, the link details page and *Journey languages* were observed the same way (Portal interface `00ea9a6` , service `9ad5ae3`). Later on 2026-10-18 *Company insights*, *Preview* and *WhatsApp consents* were observed too (Portal interface `4e3d45d` , service `6c3abb1`). After their fixes, the link details page (Portal interface `694dc66`), *Preview* and *WhatsApp consents* (Portal interface `a259594` , service `029081f`) were observed again on 2026-10-18. Screens still marked *From source*; *not observed* were not exercised; the form editor carries a known defect.

Screenshots are not included in this edition.

Menu

Item	Opens	Who sees it
Dashboard	<u>Dashboard</u>	Everyone with access to Portal
Company insights	<u>Company insights</u>	Everyone with access to Portal; the data loads only for a company administrator
Forms › My Forms	<u>My Forms</u>	Administrator, technical team
Forms › Preview	<u>Preview</u>	Administrator, technical team
Send & Collect › Access Links	<u>Magic Links</u>	Administrator, technical team

Item	Opens	Who sees it
Send & Collect › Journey languages	Journey languages	Everyone with access to Portal; only a company administrator can publish
Support	My support requests	Everyone with access to Portal, where support requests are reachable

Opened on its own address instead of inside Cogneris, Portal adds a **Home** page with shortcuts to the same items.

Dashboard

How to get here	Menu Dashboard , or open Portal
Who sees it	Everyone with access to Portal
Content status	Observed (2026-10-17, by a company administrator and by a profile without administrator access)

Area	Content
Counters	Total MagicLinks, Created today, Open rate, Conversion rate, Avg. response time, Expiring in 7 days — for the whole company
Charts	Links by Status, Daily Volume (30 days) (links created), Sending Channel
Form Analytics	Total Submissions, Completion Rate, Avg. Fill Time, Active Forms, and Top Forms by Submissions. Not connected yet: every value shows — and the table shows <i>No data found.</i>
Action	Refresh reloads the figures
Error	<i>Failed to load metrics.</i>

Company insights

Sign-in activity of your company for **Last 24h**, **Last 7 days** or **Last 30 days**: the cards **Usage** (sign-ins), **Unique visitors** and **Events / visitor**; **API usage**, the sign-ins per day against the previous period, as a chart or a table (**Date**, **Current**, **Previous**); **Access by country** (*No data for the selected period* when there is none); the **Access heatmap** by day of week and hour; and **Top origins**, **Top browsers** and **Top countries**.

How to get here	Menu Company insights
Who sees it	Everyone can open it; without company administrator access it shows <i>This page requires company administrator access. Ask an administrator at your company to grant it.</i>
Content status	Observed (2026-10-18, by a company administrator and by a profile without administrator access)

My Forms

Every form of the company. Used by [Prepare a form](#).

How to get here	Menu Forms > My Forms
Content status	Observed (2026-10-18, by a company administrator)

Column	Content
(box)	Selects the form for bulk delete
Thumbnail	Picture of the form, or <i>No Image</i>
Name, Description	As saved in the editor

Column	Content
Actions	Workflow (bind a workflow), <i>Edit Metadata</i> (opens the form editor), <i>Delete</i>

Action	Effect	Reversible?
New Form	Opens the form wizard	—
Export CSV	Downloads the list of forms	—
Workflow → Save Changes	Sets the workflow that receives the submissions, or None	Yes
<i>Delete</i> → Delete	Deletes the form: <i>This action cannot be undone.</i>	No
Delete in the selection bar	Deletes the selected forms	No

When empty: *No forms found. Create your first form!* with **Create Form**.

Form wizard

How to get here	New Form on <i>My Forms</i>
Content status	Observed (2026-10-18, by a company administrator)

Step	Content
Name	Form Name , up to 50 characters
Description	AI-written description, editable
Fields	<i>Suggested Sections & Fields</i> , AI-written text, editable

Step	Content
Documents	<i>Required Documents</i> : one line per document, Add document , remove button per line
Layout	Single Page or Multiple Steps , then Create Form

Back, **Next**, **Cancel** (first step) and **Retry** (after an error) move through the wizard. *Error calling AI...* means the AI prompt for that step is not configured for the company.

Form editor

How to get here	Create Form at the end of the wizard, or <i>Edit Metadata</i> on <i>My Forms</i>
Content status	From source; not observed

Area	Content
Header	Back , the form name, Save Changes
Builder	The visual form builder: palette of fields, the form, and the field settings
Details panel	Name * , Description , Workflow (or None), Available in the mobile app , and Document Requests with + Add , edit and delete per row. Can be collapsed.

Document request field	Required	Content
Title *	Yes	Up to 50 characters; shown to the recipient
Description *	Yes	Instruction shown under the title
Types Allowed *	Yes	The kinds of document accepted

Document request field	Required	Content
For Each *	Marked required	Form field whose values repeat the request; empty means ask once
Validation	No	Validation rule
Optional	No	The recipient may skip the document

Action	Effect	Reversible?
Save Changes	Saves name, description, workflow, mobile setting and design: <i>Changes saved!</i>	Yes, by editing again
Create / Update (document request)	Saves the request immediately	Yes
Delete (document request) → Delete	<i>Are you sure you want to delete this document request?</i>	No

KNOWN DEFECT — XTRAK-2594

The form editor does not open: *Edit Metadata* on *My Forms* and **Create Form** at the end of the wizard leave the content area blank, because the visual builder is not licensed for the Cogneris address. Observed in DEV on 2026-10-18; tracked in XTRAK-2594. The wizard still creates the form. This screen's content is still *From source; not observed*.

Preview

Try a form as a recipient would, without sending a link. Page title: **Test forms**.

How to get here	Menu Forms › Preview
------------------------	-----------------------------

Content status	Observed (2026-10-18, by a company administrator, up to Confirm ; Open Camera not walked)

One card per form. Selecting a card opens the run page: the form with **Submit**, then the tabs **Exported Form, Checklist (...)** — one card per document request, with **Open Camera, Upload File, Retake** and **Delete**, and a green check once the file is in — and **JSON** (the answers as data, with **Copy**). Under the cards: *... items selected*, **Confirm** and **Back to Form**. **Confirm** enables once every document request has a file; selecting it shows *Documents captured successfully* and the capture identifiers on the **JSON** tab. **Back to Tests** returns to the cards.

Magic Links

Every access link of the company. Used by Follow up an access link.

How to get here	Menu Send & Collect > Access Links
Content status	Observed (2026-10-18, by a company administrator)

Area	Content
Header actions	WhatsApp consents, Create Magic Link
Filters	Name, Form, Start Date, End Date, Status (All, Created, Sent, Accessed, Form Completed, Docs Completed, Pending, Finished, Revoked, Expired)
Columns (sortable)	Name (and e-mail), Form, Created at, Last Access, Accesses, Channel, Status
Paging	10 per page, <i>Showing ... of ...</i> , Previous, Next

Row action	Shown when	Effect	Reversible?
<i>Copy link</i>	The full link is available — in practice never for a saved link	Copies the link	—
<i>Resend</i>	Not Revoked	Sends a new link; the old one stops working	No
<i>Revoke</i>	Not Revoked or Finished	Cancels the link	No
<i>Delete</i>	Always	Removes the link	No

No magic links found for the selected filters. when nothing matches; *Error loading Magic Links.* on error.

Create New Magic Link dialog

Used by [Send an access link](#).

How to get here	Create Magic Link on <i>Magic Links</i>
Content status	Observed (2026-10-18, by a company administrator)

Field	Required	Values
Form *	Yes	The company's forms. The empty choice reads <i>None (create without sending)</i> .
Name *	Yes	Free text
CPF / Tax ID	No	Free text
Deadline (days)	No	1 to 365; default 30

Field	Required	Values
Email	For e-mail	Up to 50 characters
Mobile Phone	For SMS and WhatsApp	Phone number
Sending Channel	No	None (create without sending), Email, SMS, WhatsApp
Journey language	No; shown only with more than one language enabled	Tenant default or one enabled language
WhatsApp consent	For WhatsApp without consent on file	Confirmation box, How was it collected?, Consent date, Where is the proof?
Max. Accesses / Single use	No	Empty = Unlimited ; Single use = 1
Notes	No	Internal notes

Action	Effect	Reversible?
Create Magic Link	Creates the link and, with a channel, sends it. Then shows Generated Link! with the link, Copy and a QR Code	The link can be revoked
Cancel / × / Esc	Closes the dialog	Yes

Link details

How to get here	Select a name in <i>Magic Links</i>

Content status	Observed (2026-10-18, by a company administrator, including Resend and Revoke)

Area	Content
Header	Name, <i>ID: ... · Form: ..., status badge</i>
Recipient	Name, CPF, Email, Phone
Access Data	Created at, Expires at, First access, Last access, Total accesses
Sending	Channel, Sent at, Notes
Access Log	Date/Time, IP (masked), Action (View , <i>reject-notify</i> ; resending and revoking are not recorded here), User-Agent ; <i>No accesses recorded.</i> when empty

Action	Shown when	Effect	Reversible?
Resend → Confirm	Not Revoked and not expired	Sends a new link on the chosen channel	No
Revoke	Not Revoked or Finished	Cancels the link	No
Request support about this process	Support requests are available	Opens a new support request for this link	—
Back	Always	Returns to the list	—

WhatsApp consents

How to get here	WhatsApp consents on <i>Magic Links</i>
Who sees it	Company administrators. Without company administrator access the WhatsApp consents button is not shown, and inside Cogneris the page shows <i>This page cannot be opened</i> .
Content status	Observed (2026-10-18, by a company administrator, including an import that fills <code>collectedWhen</code> , and by a profile without administrator access)

Column	Content
Number	Phone number
Status	Granted, Revoked or Opted out
How was it collected?	Web form, Contract, In person, Import
Consent date, Recorded by, Where is the proof?	As recorded

Actions: **Revoke** (granted rows) → *Stop sending WhatsApp messages to ...?*; **Import CSV** (`phone,source,evidenceText[,collectedWhen]` , E.164 numbers). Messages: *Consent revoked, ... consents imported, ... imported, ... failed, That file has no rows,* and *CSV line ...: "..."* is not an E.164 number for a row that is not. When a row fills `collectedWhen` (a date such as `2026-10-17` , or a date and time), that is the consent date shown; without it, the consent date is the import date.

Journey languages

Which languages recipients may use on the recipient's page, and the company's own wording for each. Page subtitle: *Choose which languages your invited visitors can use and adapt the wording of the journey for each of them*.

How to get here	Menu Send & Collect › Journey languages
Who sees it	Everyone with access to Portal. Anyone who is not a company administrator sees <i>Only tenant administrators can change journey languages and texts. You can review the settings here.</i>
Content status	Observed (2026-10-18, by a company administrator, who published, and by a profile without administrator access, who saw it read-only)

Area	Content
Languages offered to visitors	English, Português (Brasil), Português (Portugal)
Default language	One of the enabled languages
Pin complete bundles for new links	Keeps a fixed copy of the journey for links created after publishing
Custom wording	Per language and message: Standard text, Your text , placeholders and length limit
Preview	The recipient's text in a chosen language
Outcomes by language	Started, Completed, Abandoned, In progress, Revoked per language
Journeys with errors	Links with errors reported by recipients
Header	Version (<i>Version ...</i> or <i>Never published: the standard settings apply.</i>) and Publish

My support requests

The requests you opened to your company's support team, and the pages to open and follow one. The journey is in [Ask your company for support](#).

How to get here	Menu Support
Who sees it	Everyone with access to Portal, where support requests are reachable. Each person sees only their own requests.
Content status	Observed (2026-10-18, by a company administrator; Portal interface 542dc84 , support service 3345d31). A reply from the support team was not observed.

Page	Content
My support requests	<i>Ask the company for help and follow the replies, New request, and one row per request with its reference, status and <i>Updated Empty: You have not opened any requests yet.</i> Turned off for the company: <i>Support requests are not available for your organization yet.</i></i>
New support request	Subject, Process reference (<i>optional</i>), Category (only when the company set up categories), Description (<i>Do not include passwords or document numbers.</i>), Cancel, Send request . New requests paused: <i>New requests are not available for your organization right now. You can still follow your existing requests.</i>
Support request	<i>Request ..., Status, Opened, Last update, Conversation (<i>No replies yet.</i> until the support team answers), Your reply and Send reply</i>

Statuses: **Open, In progress, Waiting for your reply, Resolved, Closed**. Replying to a **Resolved** request reopens it; a **Closed** request takes no replies.

Recipient's page

The public page a recipient opens from the link. No Cogneris sign-in. Used by Complete a document request.

How to get here	The personal link in the message, or its QR code
Content status	Observed (2026-10-17, form, Upload File, Confirm and a correction round, in English, Português (Brasil) and Português (Portugal); Open Document Camera and the selfie check not walked)

Area	Content
Header	Document Portal, Submit Documents , the status (Protected link, Correction needed, Documents Received! , or the error)
Progress	<i>Verifying link...</i> , Fill Form (when the link has a form), Submit Documents, Documents Received!
Security	Protected link, No account required, Limited access
Context	Expires at, Process ID:
Journey language	Shown when more than one language is enabled
Form step	<i>This link expires on ...</i> , the form, Submit
Documents step	<i>How it works?</i> (or the Correction needed notice), one card per document with Open Document Camera, Upload File, Retake, Delete , then Confirm (or Resend document in a correction round)

Message	When
Link Expired, Link Cancelled, Access Limit Reached, Link Not Found, Unable to Verify Link	The link cannot be used
<i>Analysing document quality...</i> , Image quality not ideal, Image quality is low	After each capture

Message	When
<i>Could not submit the form..., Document capture failed..., Could not finalize your submission...</i>	A step failed
Documents Received!	After Confirm

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Workflow overview

Before using Workflow you need to sign in with a profile that allows it.

What Workflow does

Workflow runs documents through a sequence of **phases** defined by your company — for example, a start phase followed by a human review. Each time documents enter a workflow, Workflow creates a **run** (listed under **Operations > Processes**). When a run reaches a human review phase, its documents wait in a review queue until a reviewer approves or rejects each one — or until the review closes by itself after it has sat idle with a rejection; see Known limitations.

Documents can enter a workflow in two ways:

- **From the Portal**, when a person you invited through an access link submits their documents. These processes have a **requester**: if a reviewer rejects a document, the process is returned to that person for correction.
- **Started inside Workflow**, by a user who uploads the documents directly. These processes have no requester, so a rejection ends the process as failed instead of returning it. The list of rejected documents is e-mailed to the **Recipient email** of the workflow's first *Send* phase, when there is one; otherwise nobody is notified. See Return a document for correction.

Who uses it

You want to	Profile you need	Where
Review documents, comment, reject with a note, return a process to its requester	A profile with access to Operations > Human Review , allocated to the review queue	<u>Review a document</u>
See processes returned to the requester	Same as above	<u>Return a document for correction</u>

You want to	Profile you need	Where
Start a process and follow every run	A company administrator or technical profile	Track a document's state and routing

If a menu item described here is missing for you, your profile does not include it. Ask your company administrator; see [Profiles](#).

Journeys in this part

1. [Review a document](#) — receive a document in your queue, check it, and approve or reject it.
2. [Return a document for correction](#) — reject with a note and return the process so the requester can fix and resubmit.
3. [Track a document's state and routing](#) — see where a process is, what happened to it, and what is waiting on the requester.

Screens in this part

The [Workflow screens](#) chapter describes each screen used by these journeys: the review queue, the review dossier, the *Awaiting requester correction* list, the *Start Workflow* dialog and the *Runs* page.

Known limitations

- **Return to requester** is offered only for processes that came from the Portal. For a process started inside Workflow the button is shown disabled, with the reason; decide every document instead. See [Return a document for correction](#).
- **Return to requester** approves every document that is still undecided — *approved by omission*, without being reviewed. The confirmation tells you how many. This cannot be undone in the interface.
- A review that already has a rejection and then sits with no new decision for 24 hours (the service default) **closes by itself**: the undecided documents are approved by omission, and the dossier records it as a *System* event. Decide or return a process you have started on.
- The return confirmation that counts the documents approved by omission is shown in Portuguese, whatever the interface language. The English text, *Process returned to the requester*, has no count; check the dossier **Timeline** instead.

- A review that ended with a rejection cannot be run again: **Try again** is not offered for it. See If something goes wrong.
-

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Review a document

Use this journey when a process reaches a human review phase and its documents are waiting in your queue.

The video below (in Brazilian Portuguese) follows one review from the queue to the decision, in a case where the selfie does not match the identity document. The screens are the same in English.



Sinistro, passo a passo (4/6): Revisão humana: quando a selfie não confere com o documento (pt-BR) [Watch on YouTube](#)

Before you start

- You are signed in and **Operations > Human Review** appears in the Workflow menu. If it does not, your profile does not include review.
- You are allocated to the review queue that holds the document. Queues are set up by your company administrator.
- At least one process is waiting for review. Processes enter review automatically when they reach a review phase; you do not need to start anything.

Steps

1. In the Workflow menu, open **Operations** and select **Human Review**. The page shows one card per queue with the number of documents waiting — for example **All** and **Unidentified** (documents whose type was not recognized).
2. Select the card of the queue you want to work on. The first document opens: its name at the top, a preview of the document, the **Approve** (✓) and **Reject** (✗) buttons and, below them, **Return to requester**. The counter on the right (for example **1 / 1**) shows your position in the queue.
3. Read the document in the preview. Use **Zoom in**, **Zoom out**, **Rotate** and **Reset view** if needed.
4. (Optional) Select **Open dossier** to see the process history and to leave a comment for other reviewers. See [Comment in the dossier](#).
5. Decide:
 - To **approve**, select **Approve** (✓).
 - To **reject**, select **Reject** (✗). A text box appears with the hint *Describe what is missing or wrong....* Type the reason and select **Confirm reject**.

The reason is required: if the box is empty, **Confirm reject** does nothing and shows no message.

6. After your decision, the next document of the queue opens. When the queue is empty, the page shows **No documents to review right now**.

You do not need to "claim" a document: opening it reserves it for you while you work, and leaving the page releases it. Both moments are recorded in the dossier timeline.

Comment in the dossier

1. In the document, select **Open dossier**. The **Review dossier** page shows the workflow name, the review status (for example *Awaiting approval*), the **Timeline** and **Earlier attempts**.
2. In **Comment**, type your text. Comments **cannot be edited or deleted** after they are saved.
3. In **Document**, keep **Whole process** or choose the specific document the comment is about.

4. (Optional) Under **Mentions**, tick the people to mention. You can mention queue members and previous reviewers.
5. Select **Save comment**. The page shows **Comment saved**.

Expected result

- When **every** document of the process has a decision, the review closes automatically:
 - all approved → the process continues to its next phase;
 - at least one rejected → the process is returned to the requester (processes from the Portal) or ends as failed (processes started inside Workflow). See [Return a document for correction](#).
- You do not have to decide every document to return a process from the Portal: after rejecting one, **Return to requester** closes the review and approves the undecided documents by omission. See [Return a document for correction](#).
- Each decision and comment is added to the dossier timeline with its date, time and author.

How to confirm it worked

- The document is no longer in the queue, and the queue card count went down.
- In **Open dossier > Timeline**, your decision appears as an entry with your name and time; a comment appears with its text.
- For the process status, follow [Track a document's state and routing](#).

If something goes wrong

What you see	What it means	What to do
Confirm reject does nothing	The reason box is empty	Type the reason and select Confirm reject again.
No documents to review right now.	The queue is empty, or nothing is allocated to you	Check another queue card; if you expected work, ask your administrator to check your queue allocation.
The dossier Timeline stays empty and Earlier	The history did not load	Reload the page. This was observed once and did not repeat after reloading.

What you see	What it means	What to do
attempts keeps showing <i>Loading...</i>		
Human Review is not in the menu	Your profile does not include review	Ask your company administrator; see Profiles .

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Return a document for correction

Use this journey when a document is wrong or incomplete and the person who sent it should fix it.

! HOW RETURNING WORKS

A process can be returned to its requester in two ways:

- **Return to requester** — reject at least one document with a note, then select **Return to requester**. The review closes at once. Every document you have not decided yet is **approved by omission**, without being reviewed.
- **Decide every document** — when every document of the process has a decision and at least one was rejected, the review closes and the process is returned automatically.

Returning only works for processes that came **from the Portal**, where a requester exists. For a process started inside Workflow, **Return to requester** is shown disabled with the reason *This process did not come from the Portal, so there is no requester to return it to. Use Reject*. Rejecting its documents ends that process as failed; see [If something goes wrong](#).

Before you start

- You can review documents in the queue; see [Review a document](#).
- The process came from the Portal. If **Return to requester** is enabled after you reject a document, it did; if it is disabled with the *did not come from the Portal* reason, it did not.
- You know what is missing or wrong — your note is what the requester will read.

Steps

1. Open the document from its queue, as in [Review a document](#).
2. Select **Reject (X)**, type in *Describe what is missing or wrong...* exactly what the requester must fix, and select **Confirm reject**. The next document of the queue opens.

3. Choose how to close the review:

- **To return now**, on a document of the same process select **Return to requester**. A confirmation appears, for example *1 rejected document(s) will be sent back for the requester to correct. 1 pending document(s) will be APPROVED BY OMISSION, without being reviewed*. Check the numbers, then select **Confirm return** — or **Cancel** to go back and decide the pending documents yourself.
- **To decide everything first, Approve** the documents that are correct and **Reject** with a note the ones that are not. When the last document is decided, the process is returned automatically. **Return to requester** is then not needed: it shows *Every document is already decided; the process is closed automatically*.

Return to requester is enabled only when the process came from the Portal, at least one of its documents is rejected, at least one is still undecided, and the review is still open for your decision. Otherwise it is disabled and the reason is shown under it.

Two cases are not caught by the button: it stays enabled when another reviewer is working on the review, and when your access is limited to specific queues. In both, the service refuses the return after **Confirm return** and nothing changes; see [If something goes wrong](#).

Expected result

- After **Confirm return**, a message confirms the return and the next document of the queue opens. The message that counts the documents approved by omission is shown in Portuguese (*Processo devolvido ao solicitante...*); the English *Process returned to the requester*. has no count. The **Timeline** in the dossier lists each one.
- The review closes with the outcome *returned*.
- The process appears on the **Awaiting requester correction** page, with the date and time it was returned and how many hours it has been waiting.
- The requester is notified and corrects and resubmits through the Portal; only the rejected documents are asked again. That part is described in the Portal manual. The corrected documents come back to the review queue.

How to confirm it worked

1. Go to **Operations > Human Review** and select **Awaiting requester correction** (link at the top of the page).
2. Find the process in the list. The columns show **Workflow, Returned at, Waiting (hours), Returned submission round** and a link to the dossier.
3. Select **Open dossier**: the **Timeline** shows your rejection with its note, one *Approved by omission* entry per document that was still pending (if you used **Return to requester**),

Returned to requester, and the review being closed.

If the process is **not** on the list, see below.

If something goes wrong

What you see	What it means	What to do
Return to requester is disabled: <i>This process did not come from the Portal...</i>	The process was started inside Workflow and has no requester.	Decide every document. If at least one is rejected, the process ends as failed (<i>Error: manual_review_rejected</i> on the Runs page) and the list of rejected documents is e-mailed to the Recipient email of the workflow's first <i>Send</i> phase, when there is one. To process corrected documents, start a new process (needs an administrator or technical profile; see Track a document's state and routing).
Return to requester is disabled: <i>Reject at least one document before returning the process to the requester.</i>	Nothing has been rejected, so there is nothing for the requester to fix.	Reject the wrong document with a note first.
Return to requester is disabled: <i>This review is not open for your decision (finished, or in review by someone else).</i>	The review is no longer waiting for a decision — it was closed, for example.	Reload the queue and check the dossier Timeline .
The process is still in the queue	At least one of its documents has no decision, and nobody used Return to requester	Decide the remaining documents, or use Return to requester .

What you see	What it means	What to do
<i>Could not return the process to the requester.</i> or another error after Confirm return — the service's reason may be in Portuguese: <i>Documento em avaliação por ...</i> (another reviewer holds the review) or <i>Avaliação em massa indisponível para avaliadores atribuídos a filas específicas...</i> (your access is limited to specific queues)	The service refused the return and nothing was changed	Reload the page and check the dossier Timeline. If another reviewer holds it, wait or ask them. If your access is limited to specific queues, you cannot return a process: decide its documents one by one, or ask a reviewer without queue restriction.
The process left the queue although nobody decided it	It already had a rejection and had no new decision for 24 hours, so it closed by itself and the undecided documents were approved by omission	Open the dossier: the Timeline shows the <i>System</i> event.
You rejected a document, or returned a process, by mistake	A decision cannot be undone in the interface, and a rejected review cannot be run again	Ask the requester to resubmit, or contact your administrator.

Track a document's state and routing

Use this journey to find out where a process is, what happened to it, and what is waiting on the requester.

Before you start

There are two places to look, and they need different profiles:

Place	What it shows	Who can open it
Operations › Human Review › Awaiting requester correction , and each dossier	Processes returned to the requester, and the full history of a review	Reviewers allocated to the queue
Operations › Processes (the Runs page)	Every run of every workflow, phase by phase, with errors	Company administrator or technical profile

If **Processes** is not in your menu, use the dossier and the *Awaiting requester correction* page, or ask your administrator.

Start a process (administrators and technical profiles)

A process that does not come from the Portal is started by hand:

1. In the menu, select **Administration** › **Flow Configuration**.
2. On the published workflow you want, select **Start**. The **Start Workflow** dialog opens.
3. Under **Documents to process**, choose one or more files. Accepted: PDF, images (PNG/JPG/TIFF/BMP), DOC/DOCX, XLS/XLSX, CSV or TXT, up to 50 MB each. Selected files are listed below the field; use ✕ to remove one.
4. Select **Start**. The button changes to **Starting...** while the documents are prepared. This can take **about 40 seconds** even for a one-page PDF; do not close the dialog.
5. When it finishes, the **Runs** page opens.

If you select **Start** without a file, the dialog shows **Select at least one document**.

A process started this way has **no requester**: if its review is rejected, it cannot be returned for correction.

Steps

Follow a process on the Runs page

1. In the menu, open **Operations** and select **Processes**. The **Runs** page shows one card per workflow with the number of runs **In progress** and **Completed / errored**.
2. Select a workflow card. Its runs are listed, newest first, with one column per phase (for example **Start** and **Manual review**). Switch between **Table** and **Kanban** at the top right; select **Back to processes** to return.
3. Read each phase marker: ✓ completed, 🖐 waiting for review, ✗ failed or rejected.
4. Select a run to open **Run detail**. It shows the **Run ID**, the number of documents, the **Error** if there is one, and a **Steps** table with each phase's **Status** (*Completed, Pending, Failed*), start and end time. For a review phase, **Open dossier** takes you to its history.
5. Select **Refresh** to update the page.

Follow returned processes

1. Select **Operations** > **Human Review** > **Awaiting requester correction**.
2. Each row is a process waiting for the requester: **Returned at**, **Waiting (hours)** — longest wait first — and **Returned submission round**.
3. Select **Open dossier** to see the full history. Select **Refresh** to update; **Queues** takes you back to the queue cards.

Expected result

Where the process is	What you see
Waiting for a reviewer	Runs : 🖐 in the review column; dossier status <i>Awaiting approval</i> ; the document is in a queue
Returned to the requester	Listed on Awaiting requester correction ; on Runs the review column shows ✗ and Run detail shows <i>Error: returned_to_requester</i>

Where the process is	What you see
Review rejected, no requester	Runs: X ; Run detail shows <i>Error: manual_review_rejected</i> and the review step as <i>Failed</i>
All documents approved	The process continues to its next phase

How to confirm it worked

- The **Run ID** in **Run detail** identifies the process; quote it when asking for help.
- The dossier **Timeline** is the record of what happened in review: who opened, decided and commented, and when.

If something goes wrong

What you see	What it means	What to do
Try again is not offered on a run whose review was rejected or returned	A rejection is a reviewer's decision, not a failure, so the review phase cannot be run again. If the request reaches the service anyway, it is refused with <i>This manual review was rejected by a reviewer. A rejection is a decision, not a failure, and is not undone by running the review again.</i> and the run does not change	For a process from the Portal, the requester corrects and resubmits. For a process started inside Workflow, start a new process with the corrected documents. A review phase that failed for a technical reason still offers Try again .
A workflow card shows a code instead of a name	The name of that workflow is not available	Use the Run ID to identify the run.
Starting... takes a long time	Documents are being prepared; about 40 seconds was observed for one page	Wait for the Runs page to open before trying again.

What you see	What it means	What to do
Processes or Administration is not in your menu	Your profile does not include them	See Profiles .

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Workflow screens

Detailed reference for each Workflow screen used by the user journeys. Labels are quoted exactly as they appear in the interface. Content was observed on 2026-10-08 (Workflow interface `5c2a9a8` , service `765d526`) and again on 2026-10-09 in DEV, inside the Cogneris Platform, during the pilot review (XTRAK-2251); the text was checked against the interface `65c117e` and service `4a548b7` . Items marked *From the product, not walked* are described from the product but the action was not carried out; items marked *Not observed* were not checked.

Screenshots are not included in this edition.

Review queue

Review documents one at a time. Used by [Review a document](#) and [Return a document for correction](#).

How to get here	Menu Operations > Human Review , then a queue card
Who sees it	Profiles with review access, allocated to the queue
Content status	Observed

Queue cards. Under *Pick a queue to start reviewing its documents*., one card per queue with the number of documents waiting (for example **All, Unidentified**). The link **Awaiting requester correction** is at the top.

Document view.

Element	What it does	Reversible?
Approve (✓)	Approves the document	No
Reject (X)	Opens the reason box	—

Element	What it does	Reversible?
<i>Describe what is missing or wrong...</i>	Reason for rejection. Required.	—
Confirm reject	Rejects the document with the reason	No
Open dossier	Opens the review dossier	—
Return to requester	Opens the return confirmation. Enabled only for a process from the Portal with at least one rejected and at least one undecided document, while the review waits for a decision; otherwise disabled with the reason shown under it	—
Confirm return	Closes the review, approves the undecided documents by omission and returns the process to the requester	No
Cancel (return confirmation)	Closes the confirmation without changing anything	Yes
Zoom in, Zoom out, Rotate, Reset view	Change the preview only (toolbar above the preview, with the zoom level, for example 100%)	Yes
Classify document	Shown for a document of unknown type: <i>This document could not be identified. Pick its type to send it on for field review</i> , with one button per document type (for example Selfies)	No

States.

State	How it looks
Document open	Name, position counter (1 / 1), preview and decision buttons

State	How it looks
Queue empty	No documents to review right now.
Reason missing	Confirm reject does nothing; no message is shown
Return available	Return to requester enabled
Return confirmation	<i>N rejected document(s) will be sent back for the requester to correct. M pending document(s) will be APPROVED BY OMISSION, without being reviewed. (N and M are the counts), Confirm return, Cancel</i>
Return unavailable	Return to requester disabled, with one of: <i>This process did not come from the Portal, so there is no requester to return it to. Use Reject.</i> · <i>Reject at least one document before returning the process to the requester. (observed)</i> · <i>Every document is already decided; the process is closed automatically.</i> · <i>This review is not open for your decision (finished, or in review by someone else).</i> — shown when the review no longer waits for a decision
Return failed	<i>Could not return the process to the requester. or the service's reason, which may be in Portuguese — for example when another reviewer holds the review (Documento em avaliação por ...) or your access is limited to specific queues (Avaliação em massa indisponível...); the button is enabled in both cases</i>
Return done	The service's confirmation, in Portuguese, with the count of documents approved by omission (<i>Processo devolvido ao solicitante...</i>); in English only <i>Process returned to the requester.</i>

Consequences. Opening a document reserves it for you; leaving releases it. When every document of the process is decided, the review closes and the process moves on, is returned to the requester, or ends as failed. **Confirm return** closes the review before that: undecided documents are approved by omission and recorded as such in the dossier timeline, and the process is returned to the requester. A review that already has a rejection and gets no new decision for 24 hours closes the same way by itself, recorded as a *System* event.

From the product, not walked: the return confirmation, **Confirm return** and the *Return done* and *Return failed* states. The disabled state with *Reject at least one document...* was observed.

Not observed: approving, choosing a type under **Classify document**, correcting extracted fields, what another reviewer sees while a document is reserved, and what a reviewer outside the queue sees.

Review dossier

The full history of one review, and the place for comments.

How to get here	Open dossier from the review queue, from <i>Awaiting requester correction</i> , or from Run detail
Who sees it	Reviewers
Content status	Observed

Area	Content
Header	Review dossier , workflow name, review status (for example <i>Awaiting approval</i>)
Timeline	Every event with date, time and author: <i>Review claimed</i> , <i>Claim released</i> , decisions, comments, <i>Approved by omission</i> , <i>Returned to requester</i> , <i>Review closed</i>
Earlier attempts	<i>No earlier attempts found.</i> when there are none. A list with entries was <i>not observed</i> .
Comment	Text box. Comments cannot be edited or deleted.
Document	Whole process or one document of the process
Mentions	People you can notify: queue members and previous reviewers

Area	Content
Save comment	Saves the comment; the page shows Comment saved .

Not observed: the notification received by a mentioned person.

Awaiting requester correction

Processes returned to the requester and not yet resubmitted.

How to get here	Operations › Human Review › Awaiting requester correction
Who sees it	Reviewers allocated to the queue of a returned document
Content status	Observed

Column	Content
Workflow	The process subject, or the workflow name when the process has none
Returned at	Date and time the review closed as returned
Waiting (hours)	Time since then; longest wait first
Returned submission round	Correction round, — for the first
Timeline	Open dossier

The subtitle reads *Time since the process was returned, shown for reference*. Actions: **Refresh**, **Queues** (back to the queue cards). Only processes that came from the Portal appear here.

Start Workflow dialog

Start a process by uploading documents. Administrator and technical profiles only.

How to get here	Administration › Flow Configuration › Start on a published workflow
Content status	Observed

Field	Required	Accepted
Documents to process	Yes	PDF, images (PNG/JPG/TIFF/BMP), DOC/DOCX, XLS/XLSX, CSV or TXT — up to 50 MB each

Message	When
Select at least one document.	Start with no file
Starting... (button)	While documents are prepared — about 40 s observed for one page

After **Start**, the **Runs** page opens and the new run is listed. A process started here has no requester.

Runs

Every run of every workflow. Administrator and technical profiles only.

How to get here	Menu Operations › Processes
Content status	Observed (Table and Kanban views)

Area	Content
Workflow cards	Under <i>Select a process to see its runs</i> , In progress and Completed / errored counts per workflow
Runs table	One row per run (newest first) with workflow version and start time, one column per phase: ✓ completed, 🙋 waiting for review, ✗ failed or rejected
Kanban	One column per phase plus Completed and Failed , each with its count; a card waiting in a review phase has Review , a failed card shows its error and Details
Run detail	Dialog with Workflow , Run ID , Documents (for example <i>2 total, 1 failed</i>), Error (for example returned_to_requester), View executed flow , and Steps (phase, status, started, completed), with Open dossier for review steps
Actions	Refresh , Back to processes , Table / Kanban , Try again , View executed flow

Action	Effect	Note
Try again	Runs the failed phase again (<i>The phase will run again shortly.</i>)	Not offered when the review phase ended with a reviewer's rejection or a return to the requester (observed on a returned run); the service also refuses it. Still offered when a review phase failed for a technical reason.
View executed flow	Button in Run detail ; what it opens was <i>not observed</i>	—

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Sign overview

Sign collects electronic signatures on documents. People who **send** documents for signature use Sign after they sign in to Cogneris. People who **sign** do not need a Cogneris account: they open a personal link received by e-mail.

What Sign does

- An **envelope** groups the documents to sign, the people who must sign them (**signers**) and the signature settings: jurisdiction, signature level and language.
- You create an envelope as a **draft**, review it and **send** it. Each signer then receives a personal signing link.
- The signer opens the link, confirms their identity with a one-time code sent to them, places their signature on every document and signs — or **declines to sign**, giving a reason.
- When every signer has signed, the envelope is **finished** and the signed package is sealed.

Envelopes can also be created by **Workflow**: when a process reaches a signature phase, Workflow raises the signature request for you. These envelopes are grouped into **cases** — one case per Workflow run. See the Workflow overview for how processes run.

Who uses it

You want to	What you need	Where
Send a document for signature	Access to Sign through your <u>profile</u>	<u>Send a document for signature</u>
Follow envelopes and cases, send a reminder	Same as above	<u>Follow up an envelope</u>
Sign or decline a document you received	Only the signing link and access to the e-mail address it was sent to	<u>Sign or decline a document</u>

Sign has no roles of its own. Every person with access to Sign in your company sees the same pages — **Dashboard**, **Cases** and **Envelopes** — and **every envelope of the company**, not only the ones they created. If Sign is missing from your menu, your profile does not include it; ask your company administrator, see [Profiles](#).

Envelope status

Status	Meaning
Draft	Created, not sent yet.
Running	Sent; at least one signer has not answered yet.
Finished	Every signer signed.
Refused	A signer declined. The envelope ended for every signer.
Expired	The envelope reached its expiry date before every signer signed. Envelopes created in Sign have no expiry date; envelopes raised by Workflow can have one.
Cancelled	Reserved. No action in Sign moves an envelope to this status today.

Journeys in this part

1. [Send a document for signature](#) — create an envelope with a document and a signer, review it and send it.
2. [Sign or decline a document](#) — what the signer does after opening the signing link.
3. [Follow up an envelope](#) — see who still has to sign, send a reminder, and follow the cases raised by Workflow.

Screens in this part

The [Sign screens](#) chapter describes each screen: the dashboard, the *New envelope* dialog, the *Envelopes* list and preview, the envelope page, *Cases*, the case page and the signing page.

Known limitations

- An envelope created in Sign has **one document and one signer**, both given in the *New envelope* dialog. The envelope page has no control to add a document or a signer later, so a draft created without them cannot be sent from the interface.
 - The only signature level offered is **Simple (SES)**.
 - There is no way to cancel a sent envelope.
 - The reason a signer types when declining is required, but Sign does not show it to the sender: the sender sees only that the envelope is **Refused**.
-

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Send a document for signature

Use this journey to ask one person to sign one document.

Before you start

- You are signed in and **Sign** appears in your menu. If it does not, your profile does not include it.
- You have the document as a **PDF, PNG or JPG file of up to 50 MB**.
- You know the signer's **e-mail address**. The signing link and the one-time code both go to that address.

Steps

1. Open Sign. The **Dashboard** opens.
2. Select the **New envelope** tile. You can also select **New envelope** at the top of the **Envelopes** page. The **New envelope** dialog opens.
3. Fill in the dialog:
 - **Envelope name** (required) — for example *MSA with Acme Corp*. The signer sees this name.
 - **Jurisdiction** — **Brazil (MP 2.200-2)** or **European Union (eIDAS)**.
 - **Signature level** — **Simple (SES)** is the only option.
 - **Locale** — **Portuguese (BR)**, **English (US)** or **Spanish (ES)**.
 - **Document (optional)** — choose the file to sign.
 - **Signer e-mail (optional)** and **Signer name (optional)** — the person who signs. If you leave the name empty, the part of the e-mail address before the  is used.

Although the dialog marks the document and the signer as optional, **give both now**: the envelope page has no way to add them later, and an envelope without a document or a signer cannot be sent.

4. Select **Create envelope**. The button shows **Creating...** while the envelope is created, the document uploaded and the signer added. The envelope page opens. Its header shows the envelope name and *Status: Draft* with the jurisdiction and signature level, followed by the **Documents** and **Signers** lists.
5. Check the document and the signer, then select **Send**. The **Send envelope?** dialog lists the signer: *The envelope will be sent to 1 signer: ... This cannot be undone.*
6. Select **Send now**.

Expected result

- The envelope moves to **Running** and the signer receives an e-mail with their personal signing link.
- The panel **Envelope sent — share these signing URLs** appears on the envelope page with the signer's name, their signing URL and a **Copy URL** button. It stays until you select **Dismiss**.
- The signer's status is **Pending** until they open the link. Continue with [Follow up an envelope](#).

How to confirm it worked

- On the envelope page, the header shows *Status: Running* and the **Send** button is replaced by **Send reminder**.
- In **Envelopes**, the envelope shows the **Running** badge, and the dashboard **Out for signature** count went up.

If something goes wrong

What you see	What it means	What to do
<i>Only PDF, PNG and JPG files can be signed.</i>	The file type is not accepted	Convert the document to PDF and choose it again.
<i>The document exceeds the 50 MB limit.</i>	The file is too large	Reduce the file size, for example by splitting the document.

What you see	What it means	What to do
<i>Enter a valid e-mail address.</i>	The signer e-mail is malformed	Correct the address.
<i>The envelope was created but the document could not be uploaded. Try again.</i>	The draft exists; only the upload failed	Select Create envelope again: the same draft is reused, no second envelope is created.
<i>The envelope was created but the signer could not be added. Try again.</i>	The draft and its document exist; only the signer failed	Check the address and select Create envelope again.
The panel says a signing link could not be delivered , and the signer is marked Not delivered	The envelope was sent, but the e-mail did not reach the signer	Select Copy URL and send the link to the signer yourself.
Send now returns to Send and nothing else happens	The envelope could not be sent — for example it has no document or no signer	Create a new envelope with the document and the signer filled in.

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Sign or decline a document

Use this journey when you received a signature request by e-mail. You do not need a Cogneris account.

The video below (in Brazilian Portuguese) shows a signer completing these steps on a phone. The screens are the same in English.



Sinistro, passo a passo (5/6): Assinatura eletrônica da declaração de sinistro pelo celular (pt-BR)
[Watch on YouTube](#)

Before you start

- You have the e-mail with your **personal signing link**. Do not forward it: the link is yours.
- You can read e-mail at the address the request was sent to. For envelopes created in Sign, your one-time code goes there too.

Steps

1. Open the signing link. The **Electronic signature** page opens. It shows the envelope name, jurisdiction and signature level, the file names of the documents, and four steps:

Open request, Verify identity, Review and sign, Complete. The link is removed from the address bar once the page has loaded.

2. Select **Send verification code**. A 6-digit code is sent to you — by e-mail when the envelope was created in Sign.
3. Type the code in the **6-digit code** box and select **Verify**. The code is valid for **10 minutes**.
4. The document opens in the page. Use **Zoom in, Zoom out, Fit to width, Previous page** and **Next page** to read it.
5. Click the place on the page where your signature should go, or select **Add signature**. The **Your signature** window opens. Choose a method:
 - **Type** — enter your **Full name**; the preview shows how the signature will look.
 - **Draw** — draw your signature in the drawing area.

Select **Apply signature**. The signature appears on the page and the document is marked **Placed**.

6. To move the signature, click elsewhere on the page. To replace it, select **Change signature**. One signature is used for the whole envelope: changing it changes it on every document.
7. If the envelope has several documents, select each one in the list above the page and place your signature on it. Until every document shows **Placed**, the page says *Place your signature on every document before signing*.
8. Tick the consent box — *I have read ... and understand my electronic signature is legally binding (MP 2.200-2 / eIDAS)*.
9. Select **Sign document**.

Decline to sign

You can decline instead of signing once your code is verified (step 3).

1. Select **Decline to sign**. The **Decline to sign?** window warns: *Declining ends the envelope for every signer and it can no longer be signed*.
2. In **Reason for declining**, say why — up to 500 characters. The reason is required.
3. Select **Decline to sign** in the window, or **Go back** to return to the document.

Expected result

- After **Sign document**: the page shows *Signature recorded successfully*, and the status **Signed**. When every signer has signed, the envelope is finished and sealed.
- After declining: the page shows **Signature declined** — *Your refusal has been recorded*. The status shows **Declined**, and the envelope becomes **Refused** for every signer. You can close the page.

How to confirm it worked

- The last step, **Complete**, is marked done at the top of the page.
- The sender sees your status as **Signed** or **Refused** on the envelope; see [Follow up an envelope](#).

If something goes wrong

What you see	What it means	What to do
<i>Invalid or expired link.</i>	The link was already used, has expired, or the envelope is no longer waiting for signatures	Ask the sender to send you a reminder: it carries a new link.
<i>Invalid code.</i>	The code is wrong or expired, or too many wrong codes were tried (5 attempts per code)	Reload the page and select Send verification code again to receive a new code.
No code arrives after Send verification code	The code could not be delivered	Check your spam folder; then ask the sender to check your e-mail address.
<i>This document could not be displayed.</i>	The preview failed	Select Download the document to read it in your own viewer.

What you see	What it means	What to do
Sign document stays disabled	Something is missing	Make sure you applied a signature, placed it on every document, and ticked the consent box.
<i>Your refusal could not be recorded...</i>	The envelope was already completed or expired, or another signer declined first	Contact the sender.

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Follow up an envelope

Use this journey to see who still has to sign, to send the signing link again, and to follow the signature requests raised by Workflow.

Before you start

- You are signed in and **Sign** appears in your menu.
- The envelope was sent. A draft has nothing to follow up; see Send a document for signature.

Steps

See who still has to sign

1. On the **Dashboard**, select **Awaiting signatures**. The **Envelopes** page opens showing only envelopes in **Running**. Select **All envelopes** instead to see every envelope.
2. Each row shows the envelope name, its signers and their e-mail addresses (in signing order), and the status badge.
3. To look at the documents without leaving the list, select the preview icon at the end of the row. The preview shows the documents, the jurisdiction, signature level, language, the **Sent**, **Expires** and **Finished** dates, each signer's status, and the sealed document hash once the envelope is finished. Select **Close** to return.
4. Select the envelope name to open the envelope page. Each signer is listed with their status:

Signer status	Meaning
Pending	Has not opened the link yet
Viewed	Opened the link
OTP requested	Asked for the one-time code
Identity verified	Entered the code; can now sign or decline

Signer status	Meaning
Signed	Signed
Refused	Declined to sign

Send a reminder

Use this when a signer did not receive the link, deleted it, or has not answered.

1. Open the envelope page. **Send reminder** is shown only while the envelope is **Running** and at least one signer has not answered.
2. Select **Send reminder**. The **Send a reminder?** dialog lists the pending signers: *The signing link will be sent again to ... pending signer(s): ...*
3. Select **Send reminder** in the dialog.

Only signers who have not answered yet receive the reminder. Each reminder carries a new link; links sent earlier and not yet used keep working.

Follow a case raised by Workflow

1. In the menu, select **Cases**. Each row is one case — one Workflow run that raised signature requests — with its name and reference, how many requests are signed (for example **1/2**), how many were not completed, the status and the last activity.
2. Select a case. The case page shows its **Reference**, **Raised by** (the system that raised it), **Still to sign** (every signer, across the case, who has not signed yet) and the list of **Signature requests**, each with its documents, send date, status and signers.
3. Select **Open envelope** on a request to open its envelope page — for example to send a reminder.

Expected result

- After a reminder, the page confirms *Reminder sent to 1 signer.* (or the number of signers), and the pending signers receive a new e-mail.
- A case reads **In progress** while any request is still out, **Signed** when every request is signed, and **Not completed** when nothing is outstanding and at least one request was refused, expired or cancelled.

How to confirm it worked

- Reload the envelope page later: the signer's status moves from **Pending** to **Viewed**, **Identity verified** and finally **Signed**.
- When every signer has signed, the envelope shows **Finished**; on the case page the request says *The signed package is available*.

If something goes wrong

What you see	What it means	What to do
<i>Reminder delivered to ... of ... pending signers. Check the addresses of those who did not receive it.</i>	Some e-mails were not delivered	Check the signers' addresses. An address cannot be corrected on a sent envelope: send a new envelope to the right address.
<i>No reminder could be delivered. Check the addresses of the pending signers.</i>	No e-mail was delivered	Same as above.
<i>The reminder could not be sent. The envelope may no longer be in progress.</i>	The envelope finished, was refused or expired meanwhile	Reload the page to see its current status.
Send reminder is not shown	The envelope is not Running , or every signer has answered	Nothing to remind.
The envelope is Refused	A signer declined. The envelope cannot be signed any more	The signer's reason is on the envelope page, visible only to you as the sender. Send a new envelope if needed.
Cases says <i>No cases yet</i>	No Workflow run has raised a signature request	Envelopes you create yourself are under <i>See envelopes created by hand</i> (the Envelopes page).

Automatic reminders and expiry

Envelopes raised by Workflow can carry an automatic reminder (sent once, a set number of days after sending) and an expiry date; both are set by the workflow, not in Sign. An envelope past its expiry date moves to **Expired**. Envelopes created in Sign have neither: use **Send reminder** to chase a signer.

Observed on 2026-10-18 in DEV: a case raised by a synthetic workflow in **Cases** and on its case page, before and after its only signer signed. **Send reminder** was not walked.

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Sign screens

Detailed reference for each Sign screen used by the journeys. Labels are quoted exactly as they appear in the English interface. Content was checked on 2026-10-09 against the Sign interface source (`sign-fe 04cf208` , which adds **Decline to sign** and **Send reminder**) and the Sign service (`sign-be 3459d6a`). On 2026-10-17 the *Dashboard*, the *New envelope* dialog, *Envelopes*, the *Envelope page* and the *Signing page* were observed in DEV, inside the Cogneris Platform, with a synthetic company, a synthetic signer and synthetic documents (Sign interface `0af6301` , service `588e71e`): an envelope was created, sent, signed with the code sent by e-mail, and another was declined. Their *Content status* says **Observed**. On 2026-10-18 *Cases* and the *Case page* were observed with a signature request raised by a synthetic workflow, before and after it was signed (Sign interface `fc7338b` , service `9e597ca`).

Screenshots are not included in this edition.

Dashboard

The landing page of Sign.

How to get here	Menu Dashboard , or open Sign
Who sees it	Everyone with access to Sign
Content status	Observed (2026-10-17)

Area	Content
Counters	Drafts, Out for signature, Completed, Completed (7d) — for the whole company
Quick actions	New envelope (opens the <i>New envelope</i> dialog), All envelopes (the <i>Envelopes</i> list), Awaiting signatures (the list filtered to Running)

Area	Content
Error	<i>We couldn't load your dashboard stats.</i> with Try again

New envelope dialog

Create a draft envelope. Used by [Send a document for signature](#).

How to get here	Dashboard tile New envelope , or New envelope on the <i>Envelopes</i> page
Content status	Observed (2026-10-17, Brazil, Simple (SES), one PDF and one signer)

Field	Required	Values
Envelope name	Yes	Free text
Jurisdiction	Yes (default Brazil)	Brazil (MP 2.200-2), European Union (eIDAS)
Signature level	Yes	Simple (SES) only
Locale	Yes (default Portuguese)	Portuguese (BR), English (US), Spanish (ES)
Document (optional)	In practice, yes	One PDF, PNG or JPG file, up to 50 MB
Signer e-mail (optional)	In practice, yes	One e-mail address
Signer name (optional)	No	Defaults to the part of the e-mail before @

Action	Effect	Reversible?
Create envelope	Creates the draft, uploads the document, adds the signer, then opens the envelope page. Disabled until a name is typed.	The draft stays; it is never sent until you select Send
Cancel / × / Esc	Closes the dialog	Yes

Messages: *Only PDF, PNG and JPG files can be signed., The document exceeds the 50 MB limit., Enter a valid e-mail address., The envelope was created but the document could not be uploaded. Try again., The envelope was created but the signer could not be added. Try again.* After a partial failure, **Create envelope** resumes on the same draft.

Envelopes

Every envelope of the company, newest first.

How to get here	Menu Envelopes ; Dashboard All envelopes or Awaiting signatures
Content status	Observed (2026-10-17, envelopes Finished and Refused)

Column	Content
Envelope	Name; links to the envelope page
Signer / E-mail	One line per signer, in signing order; <i>No signers</i> when there is none
Status	Draft, Running, Finished, Cancelled, Refused, Expired
(preview icon)	Opens the envelope preview

The list shows up to 50 envelopes; there is no paging, search or status selector on the page. *No envelopes yet.* when empty; *We couldn't load your envelopes.* with **Try again** on error.

Envelope preview. A side-by-side view: the selected document on the left (PDF and images are previewed; *This file type can't be previewed.* otherwise), and on the right **Jurisdiction**, **Signature level**, **Language**, **Sent**, **Expires**, **Finished**, **Signers** (status and authentication method), **Documents** and, once sealed, **Sealed document hash**. **Close** returns to the list.

Envelope page

One envelope, and the place to send it or send a reminder.

How to get here	Select an envelope name in <i>Envelopes</i> , or Open envelope on a case
Content status	Observed (2026-10-17, Send and the envelope Finished or Refused ; Send reminder not walked)

Area	Content
Header	Envelope name; <i>Status: ... · jurisdiction · signature level</i>
Documents	Order, file name and the first characters of the document hash
Signers	Order, name and signer status

Action	Shown when	Effect	Reversible?
Send → Send now	Status is Draft	Sends the envelope; signing links go out by e-mail	No
Send reminder → Send reminder	Status is Running and at least one signer has not answered	Sends a new signing link to every signer who has not answered	No
Copy URL	After sending, in the <i>Envelope sent</i> panel	Copies one signer's signing URL	—

Action	Shown when	Effect	Reversible?
Dismiss	In the <i>Envelope sent</i> panel	Hides the panel	The URLs are not shown again

Message	When
Envelope sent — share these signing URLs	After Send now
<i>... signing link(s) could not be delivered. Copy ... and send it to the signer yourself. and Not delivered</i>	Sent, but an e-mail failed
<i>Reminder sent to ... signer(s).</i>	Every pending signer was reached
<i>Reminder delivered to ... of ... pending signers...</i>	Some were reached
<i>No reminder could be delivered...</i>	None was reached
<i>The reminder could not be sent. The envelope may no longer be in progress.</i>	The service refused the reminder

There is no action to add a document or signer, edit, or cancel. The page shows the document hash, but offers no download of the sealed document or of the audit trail. When a signer declines, the reason is shown on this page with *Only you, as the sender, can see this reason.*

Cases

Signature requests grouped by the Workflow run that raised them.

How to get here	Menu Cases
Content status	Observed (2026-10-18, one case In progress 0/1 , then Signed 1/1)

Column	Content
Case	Case name (or <i>Unnamed case</i>) and reference; links to the case page
Signed	Signed requests out of all requests, e.g. 1/2 ; ... <i>not completed</i> when some were refused, expired or cancelled
Status	In progress, Signed, Not completed, Empty
Last activity	Date and time

Up to 50 cases, most recently active first. When there are none: *No cases yet. A case appears here once a workflow raises a signature request.* with the link *See envelopes created by hand.*

Case page

How to get here	Select a case in <i>Cases</i>
Content status	Observed (2026-10-18, Raised by <i>workflow</i> , a pending signer, then <i>Everyone has signed.</i> and <i>The signed package is available.</i>)

Area	Content
Reference	The case reference
Raised by	The system that raised the requests, when known
Still to sign	Every signer of the case who has not signed, or <i>Everyone has signed.</i>
Signature requests	One card per envelope: name, ... <i>document(s)</i> , send date, status, signers with their status, <i>The signed package is available.</i> once sealed, and Open envelope

Signing page

The public page a signer opens from the e-mail. No Cogneris sign-in. Used by [Sign or decline a document](#).

How to get here	The personal signing link in the signature request e-mail
Content status	Observed (2026-10-17, verification code, Add signature with Type , consent, Sign document ; and Decline to sign with a reason)

Area	Content
Header	Electronic signature , status (<i>Protected signature flow</i> , Signed , Declined or Unavailable), and the steps Open request , Verify identity , Review and sign , Complete
Context	Envelope , Jurisdiction , Signature level
Security notes	Identity check , Protected link , Audit trail
Before verification	Document file names only (selecting one downloads it), Send verification code , then the 6-digit code box and Verify
After verification	Document list with Placed / Pending per document, the document viewer (Zoom in , Zoom out , Fit to width , Previous page , Next page), Add signature , Change signature , the consent box, Decline to sign and Sign document

Action	Effect	Reversible?
Apply signature (in <i>Your signature</i> , Type or Draw)	Sets the signature and places it where you clicked	Yes, until Sign document

Action	Effect	Reversible?
Sign document	Records the signature on every document. Enabled only with a signature placed on every document and the consent box ticked	No
Decline to sign → Decline to sign	Refuses with a required reason (up to 500 characters); ends the envelope for every signer	No

Message	When
<i>Invalid or expired link.</i>	The link cannot be used
<i>Invalid code.</i>	Wrong, expired (10 minutes) or exhausted (5 attempts) code
<i>Enter a reason for declining.</i>	Decline to sign with an empty reason
<i>Your refusal could not be recorded...</i>	The envelope is no longer waiting for signatures
<i>Signature recorded successfully.</i>	After Sign document
Signature declined — <i>Your refusal has been recorded...</i>	After declining

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Document Center overview

Before using the Document Center you need to sign in with a profile that includes it.

ⓘ 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 2026-10-18 the Dashboard, the **Upload document** dialog and the **Shared document** page were observed in DEV with a synthetic company and synthetic documents (interface `44d2f38`, service `6fd4193`); what is still to be observed is listed under *Not observed* in Document Center screens.

The video below (in Brazilian Portuguese) walks through one insurance claim in the Document Center: the process, its documents and its history in one place.



Sinistro, passo a passo (6/6): Document Center: o sinistro inteiro organizado num só lugar (pt-BR)
[Watch on YouTube](#)

What the Document Center does

The Document Center (ECM) keeps every document your company receives or produces, and the **processes** those documents belong to. In the platform menu it is called **Document Center**; inside it, the menu has two entries: **Dashboard** and **My Drive**.

- A **process** is a case that arrived with its documents — for example a form submitted through the Portal and run through Workflow. The Document Center keeps the case, its documents, what was extracted from them, and the history of every decision.
- A **document** can also be *loose*: uploaded directly, received by e-mail or through the API, without a process. Loose documents wait in an **Inbox** until someone links, archives or discards them.
- Documents live in **folders**. Each document keeps its **versions**, **tags** and a **timeline** of what happened to it.

Who uses it

You want to	Profile you need	Where
See the activity of your company and upload a document	Any profile that includes the Document Center	Upload a document
Open a document someone shared with you by link	None — no account is needed	Open a shared document
Browse processes and folders, triage the Inbox, search, share	A company administrator or technical profile	Administrator manual , Document Center part

The **Dashboard** is available to every profile that includes the Document Center. **My Drive** — processes, Inbox and folders — and the screens behind it are managed by company administrator and technical profiles, so they are described in the [administrator manual](#). If a menu item described here is missing for you, your profile does not include it; ask your company administrator. See [Profiles](#).

Where the documents come from

- **Portal and Workflow.** When a person you invited through the [Portal](#) submits a form, its documents run through Workflow and arrive in the Document Center as a process, with

its review decisions. How a document is reviewed and returned for correction is described in the [Workflow](#) part.

- **Sign.** A document version that carries a signature is marked **Signed** in its version list. How documents are sent for signature is described in the [Sign](#) part.
- **Direct.** Documents uploaded from the Dashboard or from a folder, and loose documents received by e-mail or API.

Journeys that cross from one product to another are routed from [Start here](#).

Journeys in this part

1. [Upload a document](#) — from the Dashboard, into a folder.
2. [Open a shared document](#) — what the person who receives a share link sees.

Screens in this part

The [Document Center screens](#) chapter describes the **Dashboard**, the **Upload document** dialog and the **Shared document** page.

Known limitations

- The **Public shares** quick action on the Dashboard opens the folder explorer. There is no screen that lists or revokes share links yet.
- **Search documents** and **Browse folders** on the Dashboard open screens that are managed by administrator and technical profiles.

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

Upload a document

Use this journey to add a single file to the Document Center from the Dashboard.

Before you start

- You are signed in and **Document Center** appears in the platform menu.
- At least one top-level folder exists. Folders are created by an administrator or technical profile; if none exists, the dialog shows *No folders yet — create one in Browse first* and you cannot upload.
- Your file is a PDF, an image, a Word file or another office file. The dialog hint reads *PDF, image, Word — up to 500 MB*.

Steps

1. In the Document Center menu, select **Dashboard**.
2. Under **Quick actions**, select **Upload document**. The **Upload document** dialog opens.
3. Drag the file onto **Drop a file here**, or select **or click to choose** and pick it. The file name and size appear under the drop area. To pick another file, select the ✕ next to it.
4. In **Destination folder**, choose the folder. Only top-level folders are listed; the first one is pre-selected.
5. Select **Upload**. The button shows **Uploading...** while the file is sent.

To leave without uploading, select **Cancel**, the ✕ in the dialog header, or press **Esc**.

Expected result

- The dialog closes and the Dashboard reloads its numbers: **Uploads today** and **Documents** include the new file.
- The document is stored in the chosen folder as its first version, and its timeline starts with *Document created* and *Version uploaded*.

How to confirm it worked

- On the Dashboard, **Uploads today** went up by one.
- An administrator or technical profile can open the folder (**My Drive** > **Archived / Loose files**, then the folder) and see the document.

If something goes wrong

What you see	What it means	What to do
Upload stays disabled	No file selected, or no destination folder	Pick a file and a folder. If the folder list says <i>No folders yet — create one in Browse first</i> , ask an administrator to create one.
<i>Upload failed. Try again or contact support.</i> (or another message under the folder field)	The service refused or did not receive the file	Try again. If it repeats, contact support with the time of the attempt.
<i>We couldn't load your dashboard stats.</i> with Try again	The numbers did not load; the quick actions still work	Select Try again . The numbers show — until they load.
Document Center is not in the menu	Your profile does not include it	Ask your company administrator; see Profiles .

Observed on 2026-10-18 in DEV: **Upload document** on the Dashboard with a synthetic PDF into a top-level folder; the dialog closed, **Uploads today** went up by one and the document was in the folder and in search.

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Open a shared document

Use this journey when someone at a company that uses Cogneris sent you a link to a document. You do not need an account.

Before you start

- You have the link. It opens a page called **Shared document** on the Document Center's address.
- If the sender protected the link with a password, you need that password from the sender. Links created with the **Share** button in the Document Center have no password.

Steps

1. Open the link in your browser. The **Shared document** page shows three steps: **Validate link**, **Unlock access** and **Preview document**. The first is already done.
2. If you received a password, type it in **Enter password**. Otherwise leave the field empty.
3. Select **Open**.
4. The document is shown on the page. PDF files can be read page by page; PNG and JPG images are shown directly.
5. *(If offered)* Select **Download** to save the file.

Expected result

- The status changes to **Document ready**, the step **Preview document** becomes active, and the page shows the **File** name and **Type**.
- Each time the link is opened, the access is recorded in the document's timeline as *Downloaded*, which the sender's company can see.

How to confirm it worked

The document preview is on the page and **Document ready** is shown.

If something goes wrong

What you see	What it means	What to do
<i>Could not open the link.</i>	The link was revoked or has expired, reached its access limit, the password is wrong, or the page could not verify the link — the page shows the same message for all of these	Check the password and open the original link again. If it still fails, ask the sender for a new link.
<i>Preview not supported for this file type.</i>	The file is not a PDF, PNG or JPG	Use Download , if offered.
No Download button	The sender did not allow downloads	Ask the sender if you need a copy.

Observed on 2026-10-18 in DEV: a link without password opened without an account, through **Open** to **Document ready**, the preview and the file name and type.

Not observed: the error cases above. Links created from the Document Center today are copied by the sender and delivered by them: the **Share** button copies the link and does not send it to anyone.

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Document Center screens

Detailed reference for each Document Center screen used by the user journeys. 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 2026-10-18 every screen below was observed in DEV with a synthetic company administrator, synthetic documents and a share link opened without an account (Document Center interface `44d2f38`, service `6fd4193`).

Screenshots are not included in this edition.

Dashboard

The landing page of the Document Center. Used by [Upload a document](#).

How to get here	Menu Dashboard . Opening the Document Center lands here.
Who sees it	Every profile that includes the Document Center
Content status	Observed (2026-10-18)

Numbers. Four tiles. Each shows — while loading or if the numbers could not be loaded.

Tile	What it counts
In progress	Processes with status <i>New</i> , <i>Processing</i> or <i>Awaiting review</i>
Completed	Processes with status <i>Completed</i>
Uploads today	Documents created since midnight (UTC), shown as <code>+n</code>
Documents	All documents of your company

Daily volume. Processes received per day over the last 14 days. With none, the chart shows *No processes in the last 14 days*.

Quick actions.

Tile	What it does
Upload document	Opens the Upload document dialog
Search documents	Opens the document search
Browse folders	Opens the folder explorer
Public shares	Opens the folder explorer. There is no screen that lists share links.

States.

State	How it looks
Numbers could not be loaded	<i>We couldn't load your dashboard stats.</i> with Try again ; tiles show —, quick actions still work

Upload document dialog

Add one file to a folder.

How to get here	Dashboard › Upload document
Who sees it	Every profile that sees the Dashboard
Content status	Observed (2026-10-18, a PDF uploaded into a top-level folder; Uploads today went up by one)

Field	Required	Accepted
File (Drop a file here / or click to choose)	Yes	One file. Hint: <i>PDF, image, Word — up to 500 MB</i>
Destination folder	Yes	Top-level folders only; the first is pre-selected

Element	What it does	Reversible?
× next to the file	Removes the chosen file	Yes
Upload	Creates the document in the folder and uploads the file as version 1. Shows Uploading... while running.	No — the interface has no action to delete an uploaded document
Cancel , × in the header, Esc	Closes without uploading	—

Message	When
<i>No folders yet — create one in Browse first</i>	No top-level folder exists
A message under the folder field — the service's own error text, or <i>Upload failed. Try again or contact support.</i>	The upload failed

Not observed: the size limit enforced by the service, and the message shown for a file above it.

Shared document

What a person who receives a share link sees. No account is needed. Used by [Open a shared document](#).

How to get here	Open a share link
Who sees it	Anyone with the link
Content status	Observed (2026-10-18, a link without password opened in a browser without an account)

Area	Content
Steps	Validate link › Unlock access › Preview document
Status	Protected share until opened, then Document ready
Enter password	Only for links protected with a password; otherwise leave empty
Open	Checks the link (and password) and shows the document
Preview	PDF page by page; PNG and JPG images. Other types: <i>Preview not supported for this file type.</i>
File, Type	Name and type of the shared file, after opening
Download	Only when the sender allowed downloads

Message	When
<i>Could not open the link.</i>	The link is revoked, expired or used up, the password is wrong, or the link could not be verified

Consequences. Every successful opening is recorded in the document's timeline as *Downloaded*.

Not observed: a password-protected, expired or used-up link (the **Share** button creates links without password, expiry or access limit, with download allowed), and *Could not open the link*.

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Chapter versions

Chapter	Version	Last reviewed
Start here	0.1.1	2026-10-09
Collect and review documents	0.1.0	2026-10-09
Sign and file a document	0.1.0	2026-10-09
Sign in	0.1.0	2026-10-08
Multi-factor authentication	0.1.0	2026-10-08
Your team	0.1.1	2026-10-08
Profiles and what they allow	0.1.0	2026-10-08
Billing and usage	0.1.0	2026-10-08
Portal overview	0.4.0	2026-10-18
Prepare a form	0.1.0	2026-10-09
Send an access link	0.1.0	2026-10-09
Complete a document request	0.1.0	2026-10-09
Follow up an access link	0.2.1	2026-10-18
Ask your company for support	0.1.0	2026-10-18
Portal screens	0.4.0	2026-10-18
Workflow overview	1.1.0	2026-10-09
Review a document	1.0.2	2026-10-09
Return a document for correction	1.1.0	2026-10-09
Track a document's state and routing	1.0.1	2026-10-09

Chapter	Version	Last reviewed
Workflow screens	1.1.0	2026-10-09
Sign overview	1.0.0	2026-10-09
Send a document for signature	1.0.0	2026-10-09
Sign or decline a document	1.0.0	2026-10-09
Follow up an envelope	1.0.0	2026-10-18
Sign screens	1.0.0	2026-10-18
Document Center overview	1.0.0	2026-10-18
Upload a document	1.0.0	2026-10-18
Open a shared document	1.0.0	2026-10-18
Document Center screens	1.0.0	2026-10-18