Cogneris User Manual

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Contents

1. START HERE
    i. Start here
    ii. Collect and review documents
    iii. Sign and file a document
2. GETTING STARTED
    i. Sign in
    ii. Multi-factor authentication
    iii. Your team
    iv. Profiles and what they allow
    v. Billing and usage
3. PORTAL
    i. Portal overview
    ii. Prepare a form
    iii. Send an access link
    iv. Complete a document request
    v. Follow up an access link
    vi. Ask your company for support
    vii. Portal screens
4. WORKFLOW
    i. Workflow overview
    ii. Review a document
    iii. Return a document for correction
    iv. Track a document's state and routing
    v. Workflow screens
5. SIGN
    i. Sign overview
    ii. Send a document for signature
    iii. Sign or decline a document
    iv. Follow up an envelope
    v. Sign screens
6. DOCUMENT CENTER
    i. Document Center overview
    ii. Upload a document

iii. Open a shared document
iv. Document Center screens

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 – 1.0.0	2026-10-08	product-documentation
Portal	Portal overview	7	1.0.0	2026-10-09	product-documentation
Workflow	Workflow overview	5	1.0.1 – 1.2.0	2026-10-09	product-documentation
Sign	Sign overview	5	1.0.0 – 1.2.0	2026-10-09	product-documentation
Document Center	Document Center overview	4	1.0.0 – 1.2.0	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
Collect and review documents	Portal → Document Center (ECM) → Workflow → back to Portal when a correction is needed	invite people to send documents, or review what they sent
Sign and file a document	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.

Last reviewed 2026-10-09 · Version 1.0.0 · Owner: product-documentation

START HERE

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.	Send an access link
2	Portal	Requester	The requester opens the link and submits the documents. The page confirms **Documents Received!** and the link moves to **Docs Completed**.	Complete a document request
3	Document Center	— (automatic)	Every submission is filed in the Document Center as a **process**,	Where the documents

#	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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START HERE

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.	Track a document's state and routing
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.	Follow a case raised by Workflow

#	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 *signature_refused*	The signer declined	The run ended as failed. Start a new process once the reason is resolved.
Run detail shows an **Error** starting with *signature_expired*	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

> **NOT YET CHECKED ON THE PRODUCT**
>
> This chapter was written from the product's source code and has not yet been checked by a person on a running Cogneris. If what you see on screen differs, the screen is right — please tell your Cogneris contact so the chapter can be corrected.

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

Content status: From source; not observed (id-fe 919a10c, sso-be 020840c, 2026-10-22; updated for WOR-172).

Everyone signs in to Cogneris on the same sign-in page, whichever product they use. This chapter covers signing in, creating an account, accepting an invitation, resetting a forgotten password, changing an expired password and signing out. The second factor (an authenticator app code) is described in Multi-factor authentication.

Before you start

- You need the address of Cogneris that your company uses. When you open any Cogneris product without being signed in, it sends you to the sign-in page, and brings you back to that product after you sign in.
- You need one of these:
  - an **e-mail address and password** for an existing Cogneris account;
  - an **invitation e-mail** from your company's administrator (see Accept an invitation);
  - a **6-digit invite code**, to create a new account and a new organization (see Create an account).
- If your company requires two-factor authentication, have your phone with the authenticator app at hand. See Multi-factor authentication.
- To change the language of the sign-in page, use **Language** in the top corner. The page is available in 15 languages.

Sign in with your e-mail and password

Steps

1. Open the sign-in page. It shows **Welcome back** and *Sign in to continue to Cogneris*.
2. Type your **Email**.
3. Type your **Password**. Select the eye button (**Show password** / **Hide password**) to check what you typed.
4. Select **Continue**. The button stays unavailable until the e-mail address looks valid and a password is typed.
5. If your account has two-factor authentication, the **Two-Factor Verification** page opens. Continue in Sign in with a second factor.
6. If your password has expired, the **Update expired password** page opens. Continue in Change an expired password.

Expected result

- The page shows *We are completing the sign-in. Please wait.*
- If you came from a Cogneris product link, that product opens. Otherwise the Cogneris platform opens.
- Which products and menus you see depends on your profile; see Profiles and what they allow.
- Some screens can appear once, before the platform opens; see After you sign in.

Other ways to sign in

The sign-in page offers other options. Use them only if your account was set up that way.

- **Sign in with a passkey** — signs you in with a passkey stored on this device, with no password. You can create an account with a passkey (see Create an account, step 7) or add one when you reset your password (see Reset a forgotten password). If this device has no passkey, you see *No passkey is available on this device. Sign in with your password instead.*
- **Log in with Google** and **Log in with GitHub** — under *or continue with*. Cogneris first opens **Invite required** and asks for a 6-digit invite code (see Create an account, step 2), then opens Google or GitHub.
- **Sign in with SAML** — shown only when Cogneris has this option turned on. Type your **Organization slug** (*Use the slug provided by your organization.*, for example *acme-eu*) and select **Continue with SAML**. The page *Continue with your organization* shows *Connecting securely…* and sends you to your company's own sign-in page. Your company administrator gives you the slug.

Create an account

Creating an account also creates a new organization in Cogneris, with you as its first user. If your company already uses Cogneris, do not create an account: ask your administrator for an invitation (see Accept an invitation).

Steps

1. On the sign-in page, select **Create a new account**.
2. The **Invite required** dialog opens: *Enter the 6-digit invite code you received to continue with the account creation.* Type the six digits and select **Continue** (it shows **Validating…** while the code is checked). **Cancel** returns you to the sign-in page.
3. On **Sign up with your email** (*Step 1 of 3*, **Account**), fill in **Email**, **First name**, **Last name** and **Phone** (choose the country calling code first, then type the number).
4. Tick *I agree to the Terms of Service and acknowledge the Privacy Policy.* Both documents open in a new tab.
5. If Cogneris offers more than one data region, the page shows *Your organization's data will be stored in the … region.* with the buttons **US** and **EU**, and *Default is US. Choose EU for a GDPR-ready deployment.* Choose the region now: it is the region your organization's data is stored in.
6. Select **Register and send code** (it shows **Sending…**). On **How should we verify you?** (*Step 2 of 3*, **Verification**), choose **Send code to email** or **Send code to phone**. Cogneris sends a code and shows *We sent a code to ….* or *We sent a code to the phone number provided.*
7. On **Verify your email** or **Verify your phone**, type the **Verification code** and select **Verify code**. **Resend code** sends a new one. If you verified by e-mail, you can instead select **Create account without a password**: your device asks you to create a passkey, and you are signed in with it — skip step 8.
8. On **Create a strong password** (*Step 3 of 3*, **Password**), type the **Password** and **Confirm password**. The list under the field shows each rule your password must meet, and marks it as met while you type. Select **Create password**.

Expected result

- You are signed in. The page shows **Almost there** and **Organization Details**: *Fill in your company information to configure your workspace.*
- Type the **Organization Name** (for example *Tech Solutions Ltd*) and select **Save and Continue** (it shows **Saving…**). The Cogneris platform opens.
- If you signed up with Google or GitHub, you skip steps 3 to 8 and go straight to **Organization Details**.

- If you verified by phone, Cogneris first asks you to confirm your e-mail address (see After you sign in).
- If someone already invited your e-mail address to their organization, Cogneris shows the invitation instead of **Organization Details** (see After you sign in).

Accept an invitation

Your company administrator invites you from the platform (see Team). You receive an e-mail with a link.

Steps

1. Open the link in the invitation e-mail. The page shows **Validating invitation...** and then **You have been invited!**: *You have been invited to join* your company's name *on the Cogneris platform.*., with the invited e-mail address.
2. Choose:
   - **Create an account** — if you do not have a Cogneris account yet. Go to step 3.
   - **Go to login** — if you already have a Cogneris account. Sign in as described in Sign in with your e-mail and password. You join the company when the sign-in completes.
   - **Decline invitation** — see Decline an invitation.
3. On **Complete your sign-up** (*Step 1 of 3*), the **Invitation email** is already filled in and cannot be changed. Fill in **First name**, **Last name** and **Phone**, tick *I agree to the Terms of Service and acknowledge the Privacy Policy.*., and select **Register and send code**.
4. On **Verify your email**, Cogneris shows *We sent a code to ....* Type the **Verification code** from the e-mail and select **Verify code**. **Resend code** sends a new one.
5. On **Create a strong password**, type **Password** and **Confirm password**, following the rules listed under the field, and select **Create password and sign in**.

Expected result

- You are signed in and the Cogneris platform opens, as a member of the company that invited you.
- What you can do depends on the profile your administrator gave you; see Profiles and what they allow.
- If you were invited as an administrator and the setup of your access did not finish, you see *Your invitation was accepted, but access setup is not complete. Retry access setup to continue.* Select **Retry access setup** (it shows **Setting up access...**). **Back to login** signs you out.

Decline an invitation

1. On **You have been invited!**, select **Decline invitation**. The page notes: *If you don't have an account, simply ignore this invitation.*
2. The dialog **Decline this invitation?** says: *To decline, you will sign in first so we can confirm it is really you. The organization will be told you declined.* Select **Continue to sign in** (or **Cancel**).
3. Sign in. The page shows **Invitation declined**: *You declined the invitation. You will not be added to the organization.* Select **Continue** to carry on with your own account.

Reset a forgotten password

Steps

1. On the sign-in page, select **Forgot my password**. The **Reset Password** page opens.
2. Type your **Email address** and select **Send Reset Code**.
3. Cogneris shows *A verification code has been sent to your email.* Type the six digits in **Verification Code** and select **Verify Code**. The code is valid for 15 minutes; after 5 wrong attempts it stops working and you must request a new one.
4. Type the **New Password** and **Confirm Password**. Once you start typing, the rules your password must meet are listed under the field. Select **Reset Password**.
    - Alternatively, select **Recover with a passkey** to create a passkey on this device instead of choosing a new password.
5. **Back to Login** returns to the sign-in page at any step.

Expected result

- The page shows *Password has been reset successfully. You can now log in.* and returns to the sign-in page after 3 seconds.
- Sign in with the new password (or with **Sign in with a passkey**).

Change an expired password

Cogneris asks you for a new password when your password has expired (by default after 365 days; your company can set a different period) or when an administrator requires a change. The same page opens when you follow the reactivation link Cogneris e-mails you after your account is unblocked.

Steps

1. After you select **Continue** on the sign-in page, the **Update expired password** page opens: *Your password has expired or must be changed. Create a new password to continue.*

2. Type the **New password**. Once you start typing, the rules are listed under the field, for example *At least 8 characters*, *One uppercase letter*, *One lowercase letter*, *One number* and *One special character*.
3. Type it again in **Confirm new password**.
4. Select **Update password** (it shows **Updating…**). Do it within a few minutes: the change request expires, and you then return to the sign-in page, which shows *This password-change request is invalid or expired. Sign in again.*

Expected result

- Cogneris returns you to the sign-in page, which shows *Password updated successfully. Sign in with your new password.* Sign in with your new password.

Password rules

Your company sets the rules; the screen always lists the ones that apply to you. The defaults are:

- at least 8 characters (a company can require more, never fewer);
- at least one uppercase letter, one lowercase letter, one number and one special character;
- not a common password, and not a password found in a known data breach;
- not one of your last 5 passwords.

After you sign in

Before the platform opens, Cogneris may show one of these screens.

Screen	When	What to do
Terms of Service & Privacy Policy	Cogneris published new terms since you last accepted them.	Read them and select **I Accept the Terms of Service and Privacy Policy** (it shows **Confirming…**). **I Do Not Accept** (it shows **Recording…**) signs you out and returns you to the sign-in page, which shows *You declined the terms, so you were signed out. Sign in again to accept them.* If your answer could not be recorded, it shows *You declined the terms and were signed out, but we could not*

Screen	When	What to do
		record your answer. Sign in again to review them.
Confirm your email	You created your account with a phone code and have not proved your e-mail address yet.	Type the **Verification code** sent to your e-mail and select **Confirm email** (**Resend code** sends a new one). On **Email confirmed**, select **Sign in again**.
You have an invitation	A company invited your e-mail address, and you signed in from the normal sign-in page.	Select **Join this organization** (it shows **Joining…**).
Open your invitation email	A company invited you, but Cogneris needs you to use the link in the invitation e-mail.	Open the invitation e-mail and follow Accept an invitation, or select **Create my own organization instead**. **Back to login** returns to the sign-in page.
Organization Details	Your account does not belong to any organization yet.	Type the **Organization Name** and select **Save and Continue**.
MFA setup required	Your company requires two-factor authentication and you have not set it up.	See Multi-factor authentication.

Sign out and session end

- To sign out, open the account menu at the top of the platform and select **Sign out**.

- When your session ends, Cogneris sends you back to the sign-in page. Sign in again to continue. If it happens while you are setting up your organization, you see *Session expired. Please log in again.*

Fields

Field	Screen	What it does	Required	Format / rules	Validation messages
Email	Sign-in page	Identifies your account.	Yes	An e-mail address.	*Please ente a valid email*
Password	Sign-in page	Proves it is you.	Yes	Any password; the sign-in page does not check its length.	*Password is required*
Organization slug	Sign-in page, **Sign in with SAML**	Names your company's SAML connection.	Yes, for SAML	The slug your company gives you, for example *acme-eu*.	*Enter a vali organizatio slug.*
Language	Sign-in page	Changes the language of the page.	No	One of the listed languages.	—
Invite code	**Invite required** dialog	Lets you create an account or use Google or GitHub.	Yes	Exactly 6 digits.	*The code must have exactly 6 digits.*, *Invalid code Please check with*

Field	Screen	What it does	Required	Format / rules	Validation messages
					whoever invited you.
Email	**Sign up with your email**	The address of your new account.	Yes	An e-mail address not yet registered.	*Please fill in all required fields correctly.*, *Email already registered.*
First name, **Last name**	Sign-up and invitation sign-up	Your name.	Yes	Not blank.	*Please fill in all required fields correctly.*
Phone and **Country calling code**	Sign-up and invitation sign-up	Your mobile number; sign-up can send the verification code to it.	Yes	Choose the country (default United States), then type 6 to 15 digits, with no spaces or symbols.	*Please fill in all required fields correctly.*
Terms checkbox	Sign-up and invitation sign-up	Records that you accept the Terms of Service and Privacy Policy.	Yes	Ticked.	*Please fill in all required fields correctly.*

Field	Screen	What it does	Required	Format / rules	Validation messages
Invitation email	**Complete your sign-up**	The address the invitation was sent to.	—	Filled in by Cogneris; cannot be changed.	—
Verification code	Sign-up, invitation sign-up	Proves you own the e-mail address or phone.	Yes	The digits you received.	*Enter the code you received.*, *Invalid or expired code.*
Password, **Confirm password**	**Create a strong password**	The password of your new account.	Yes	Meets every rule listed; both fields identical.	*Fix the highlighted fields to create your password.* and the password messages in If something goes wrong
Organization Name	**Organization Details**	The name of your new organization.	Yes	Not blank.	*Please fill in all required organization fields correctly.*
Email address	**Reset Password**	The account whose password you reset.	Yes	An e-mail address.	— (**Send Reset Code** stays unavailable

Field	Screen	What it does	Required	Format / rules	Validation messages
Verification Code	**Reset Password**	Proves you received the reset e-mail.	Yes	6 digits; valid 15 minutes; 5 wrong attempts make it stop working.	*An error occurred. Please try again.*
New Password, **Confirm Password**	**Reset Password**	Your new password.	Yes	Meets every rule listed; both fields identical.	*Passwords do not match.* and the password messages ir If something goes wrong
New password, **Confirm new password**	**Update expired password**	Your new password.	Yes	Meets every rule listed; both fields identical.	*The passwords do not match.* and the password messages ir If something goes wrong

If something goes wrong

On the sign-in page

What you see	What it means	What to do
Invalid credentials. Try again.	The e-mail address or password is wrong. It also appears for a correct password while Cogneris is slowing down repeated attempts after wrong passwords.	Check both and try again. If you are sure they are right, wait a few minutes before trying again, or reset your password.
User blocked. Contact the Administrator	Your account was blocked: after too many wrong passwords (5 by default; your company can set fewer), after a long period without signing in (90 days by default, if your company uses this rule), or by an administrator.	Ask your company administrator to unblock it. You may then receive an e-mail link to choose a new password.
Account is inactive. Contact Administrator	Your account is deactivated.	Ask your company administrator.
Blocked after multiple attempts. Try again in a few minutes.	Too many sign-in attempts in a short time.	Wait a few minutes.
Too many attempts. Try again in … seconds.	Too many attempts; the buttons stay unavailable for the time shown.	Wait for the countdown to end.
We could not verify this login attempt. Please try again.	The page's automatic security check failed.	Reload the page and try again.
Connection error. Check your internet.	The page could not reach Cogneris.	Check your connection and try again.
A server error occurred. Try again later.	Cogneris could not complete the sign-in.	Try again later. If it persists, contact Cogneris support.

What you see	What it means	What to do
Sign-in is temporarily unavailable in your account's region. Try again later or contact support.	The Cogneris region that holds your account is unavailable.	Try again later, or contact Cogneris support.
We could not confirm which region your account belongs to. with **US** / **EU** and *Select your organization's region and sign in again.*	Cogneris could not tell which region holds your account, so the sign-in may have gone to the wrong one.	Select your organization's region and select **Continue** again.
No passkey is available on this device. Sign in with your password instead.	You chose **Sign in with a passkey**, and this device has no passkey for Cogneris, or you cancelled the device prompt.	Sign in with your e-mail and password.
Enter a valid organization slug.	The organization slug is empty or not in a valid form.	Type the slug your company gave you.
This sign-in is unavailable. Check the address or return to sign in.	The SAML sign-in for that slug could not start.	Check the slug, or select **Return to normal sign in**.

Invite code

What you see	What it means	What to do
The code must have exactly 6 digits.	The code is incomplete.	Type all six digits.
Invalid code. Please check with whoever invited you.	The code is wrong or no longer valid.	Ask the person who gave you the code for a current one.

What you see	What it means	What to do
We could not verify the code. Please try again.	The check could not be done.	Try again.
Verification is temporarily unavailable. Try again.	The page's security check failed.	Try again later.

Creating an account or completing an invitation

What you see	What it means	What to do
Please fill in all required fields correctly.	A field is empty or invalid (for example, a phone number with fewer than 6 digits).	Check every field and the terms checkbox.
Email already registered.	This e-mail address already has a Cogneris account.	Sign in instead, or reset your password.
We could not complete the registration. Please try again.	The registration was refused or failed.	Try again. If it persists, contact Cogneris support.
We could not send the verification code.	The code could not be sent.	Try again, or choose the other channel.
Code resent. Check your email. / *Code resent. Check your phone.*	A new code was sent.	Use the newest code.
We could not resend the code.	The new code could not be sent.	Wait a moment and select **Resend code** again.
Enter the code you received.	The code is missing or incomplete.	Type the full code.

What you see	What it means	What to do
Invalid or expired code.	The code is wrong or too old.	Select **Resend code** and use the new code.
Password rules are unavailable. Restart verification and try again.	Cogneris could not load the password rules.	Start the sign-up again.
Fix the highlighted fields to create your password.	The password does not meet the rules, or the two fields differ.	Follow the rules listed under the field.
We could not set the password.	The account could not be finished, or the passkey could not be created.	Try again.
We could not finish your registration.	The invitation sign-up could not be finished.	Try again from the invitation e-mail link.
Please fill in all required organization fields correctly.	**Organization Name** is empty.	Type the name.
We could not save the organization. Please try again.	The organization was not created.	Select **Save and Continue** again.
Session expired. Please log in again.	Your session ended before the organization was saved.	Sign in again.
You must accept the Terms of Service and Privacy Policy to continue.	Your acceptance of the new terms could not be recorded.	Select **I Accept the Terms of Service and Privacy Policy** again.

Invitations

What you see	What it means	What to do
Invalid invitation — *This invitation link is not valid. Please check your email or ask the organization admin for a new invitation.*	The link is incomplete or does not match an invitation.	Open the link again from the e-mail, or ask for a new invitation.
Invitation expired — *This invitation is no longer valid. Please ask the organization admin for a new invitation.*	The invitation is too old.	Ask your administrator to invite you again.
Invitation already answered — *This invitation has already been accepted or declined.*	The invitation was used.	Select **Go to login** and sign in.
Error — *Error validating the invitation.*	The invitation could not be checked.	Try again later.
We could not add you to this organization. Try again, or ask the admin to resend the invitation.	Joining failed.	Select **Join this organization** again, or ask for a new invitation.
Invitation can't be accepted — *This email address already belongs to another organization, so it can't join this one. Ask the administrator who invited you to use a different email address, or contact support.*	Your e-mail address is already a member of another organization in Cogneris.	Ask the administrator to invite another address.
Your invitation was accepted, but access setup is not complete. Retry access setup to continue.	You joined, but your access is not ready.	Select **Retry access setup**.
Invitation not changed — *This invitation was already accepted or declined, so nothing changed. / We*	Your decline did not apply.	Select **Continue**.

What you see	What it means	What to do
could not find this invitation, so nothing changed.		
We could not decline the invitation. Please try again from the invitation link.	The decline failed.	Open the invitation link again and decline.
Your account needs two-factor setup before you can decline. Finish the setup, then open the invitation link again.	Your company requires two-factor authentication and you have not set it up.	Set it up (see Multi-factor authentication), then open the link again.
We could not send the code. Try resending it in a moment.	The e-mail confirmation code was not sent.	Select **Resend code**.
Invalid or expired code. Check it and try again.	The e-mail confirmation code is wrong or too old.	Check it, or select **Resend code**.

Passwords

These messages appear when you create, reset or change a password.

What you see	What it means	What to do
The password does not meet the minimum length.	Too short.	Use at least the number of characters listed.
Add at least one uppercase letter. / Add at least one lowercase letter. / Add at least one number. / Add at least one special character.	A required kind of character is missing.	Add it.
Choose a less common password.	The password is on a list of common passwords.	Choose another.

What you see	What it means	What to do
This password was found in a data breach. Choose another one.	The password appears in a known data breach.	Choose a password you have never used elsewhere.
Choose a password you have not used recently.	You used this password recently.	Choose a new one.
The passwords do not match. / *Passwords do not match.*	The confirmation differs.	Type the same password in both fields.
The password does not meet your organization's policy.	The password breaks one of your company's rules.	Follow the rules listed under the field.
Password change is temporarily unavailable. Try again.	The password could not be checked or saved.	Try again later.
This password-change request is invalid or expired. Sign in again.	Too much time passed on **Update expired password**. Shown on the sign-in page it returns you to.	Sign in again; the page opens again.
An error occurred. Please try again.	The reset code is wrong or expired, or the reset failed.	Check the code; if needed, start again with **Send Reset Code**.
Password rules are unavailable. Restart the reset process and try again.	Cogneris could not load the password rules.	Start again from **Forgot my password**.

After sign-in

What you see	What it means	What to do
Authentication error — *A server error occurred. Try again later.*	The sign-in could not be completed.	Select **Back to login** and sign in again.
Authentication error — *Access was denied.*	You refused access, or access was refused, on the sign-in or provider page.	Select **Back to login** and try again.
Authentication error — *The authentication request was invalid.*, *The requested authentication scope is invalid.*, *The authentication service returned an error.*, *Authentication is temporarily unavailable.*, *This client is not authorized.* or *The requested authentication response is unsupported.*	The sign-in request could not be completed.	Select **Back to login** and try again. If it persists, contact Cogneris support.

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Multi-factor authentication

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

Content status: From source; not observed (id-fe 919a10c, sso-be 020840c, 2026-10-22; updated for WOR-172). The **My space › MFA** and **Force all users to use MFA** screens are from admin-fe a915204.

Multi-factor authentication (Cogneris calls it **two-factor authentication**) adds a second step to signing in: after your password, you type a 6-digit code from an authenticator app on your phone. Someone who learns your password still cannot sign in without your phone.

What Cogneris offers

Method	What it is	When you use it
Authenticator app	A 6-digit code that changes every few seconds, shown by any authenticator app that reads a QR code (time-based codes).	Every time you sign in.
Backup codes	8 single-use codes of 8 letters and digits, shown once when you set up the authenticator.	When you do not have your phone. Each code works once.

Cogneris does not send second-factor codes by SMS or e-mail. The codes sent by e-mail or SMS while you create an account or reset a password are a different thing: they prove you own the address or phone, and are not a second factor.

Before you start

- Install an authenticator app on your phone.
- Have a safe place ready for the backup codes (a password manager, or a printed copy kept somewhere secure).
- Two-factor authentication is set up on **your** account: each person sets up their own.

Set up a second factor

There are two ways to reach the setup: you turn it on yourself, or your company requires it and Cogneris asks you at sign-in.

Turn it on yourself

1. Sign in and open **My space › MFA**. The **Two-factor authentication** page opens: *Add an extra layer of security to your account.*
2. **Status** shows **Disabled**. Select **Enable two-factor authentication**.
3. Under **Scan this QR code**, follow *Scan the QR code below with your authenticator app, then enter the 6-digit code it generates.* If you cannot scan, type the code under **Or enter this code manually** into the app.
4. Under **Backup codes**, read *Save these one-time codes somewhere safe. Each one works only once, if you ever lose access to your authenticator app.* Save them now, or select **Download backup codes**. You do not see them again.
5. Type the 6-digit code from the app in **Verification code** and select **Verify and enable**. **Cancel** stops the setup.

Expected result: *Two-factor authentication is now enabled.* and **Status** shows **Enabled**. From the next sign-in, Cogneris asks for a code.

When your company requires it

If your company administrator turned on **Force all users to use MFA** and you have not set up two-factor authentication, Cogneris stops after your password and shows **MFA setup required**: *Your company requires MFA. Set up an authenticator now; after verification, sign in again to complete an MFA-protected session.*

1. Scan the QR code with your authenticator app, or type the **Manual entry code** into it.
2. Save the codes listed under **Backup Codes**: *Save these codes securely. Each can be used once if you lose access to your authenticator.* Select **Download backup codes** to save them as a text file, or copy them. You do not see them again.
3. Type the code from the app in **Enter the 6-digit code from your authenticator** and select **Verify & Enable**.

Expected result: Cogneris signs you out and returns you to the sign-in page, which shows *Two-factor authentication is on. Sign in to continue.* Sign in again: this time Cogneris asks for a code, as described below.

Sign in with a second factor

1. On the sign-in page, type your e-mail and password and select **Continue**.
2. The **Two-Factor Verification** page opens: *Enter the 6-digit code from your authenticator app*.
3. Type the code shown by the app in **Enter the 6-digit code from your authenticator**. Select **Verify**.
4. Without your phone, select **Use a backup code instead**. The page explains *Enter one of the backup codes you saved when you set up two-factor authentication.* and the field changes to **Backup Codes**; type one of your backup codes (letters are not case-sensitive) and select **Verify**. That code then stops working. **Use authenticator app** switches back.
5. **Back to Login** returns to the sign-in page.

Expected result: the sign-in continues as in Sign in.

Complete this page within 5 minutes of entering your password. After that, every code is refused; select **Back to Login** and sign in again.

If your company signs in with SAML

If you sign in through your company's own sign-in page (**Sign in with SAML**), Cogneris may ask for a code after it. The page shows **Additional verification** and **Verify it is you**: *Use a code from your authenticator or a recovery code.*

1. Type a code from your authenticator app, or one of your backup codes, in **Authenticator or recovery code** (*Enter one code to continue securely.*).
2. Select **Verify and continue** (it shows **Verifying…**).
3. **Return to sign in** leaves the page.

You have 5 minutes to complete this page.

Turn it off

1. Open **My space › MFA**. **Status** shows **Enabled**.
2. Select **Disable two-factor authentication**. The page asks: *Enter a current code from your authenticator app to disable two-factor authentication.*

3. Type the current 6-digit code from the app in **Verification code** and select **Disable two-factor authentication**. A backup code is not accepted here.

Expected result: *Two-factor authentication has been disabled.* and **Status** shows **Disabled**.

You cannot turn it off while your company requires two-factor authentication (**Force all users to use MFA**): Cogneris refuses with *Your organization requires two-factor authentication, so it cannot be turned off.* and **Status** stays **Enabled**. If Cogneris cannot check your company's policy at that moment, it refuses too, with *We could not check your organization's policy. Nothing was changed; try again later.*

What your administrator can require

A company administrator can require two-factor authentication for everyone in the company: **Company administration › Organization › Company and branding**, section **Account security**, switch **Force all users to use MFA** (*Users who have not enabled MFA must enroll the next time they sign in.*). Cogneris confirms with *MFA policy saved.*, or shows *Unable to save the MFA policy.*

Users who already have two-factor authentication are not affected. The others see **MFA setup required** at their next sign-in (see When your company requires it).

If something goes wrong

What you see	What it means	What to do
Invalid code. Please try again.	On **Two-Factor Verification** or **MFA setup required**: the code is wrong, already used (backup code), or the page waited more than 5 minutes.	Type the code currently shown by the app. Check that your phone's clock is set automatically. If it keeps failing on **Two-Factor Verification**, select **Back to Login** and sign in again.
That code didn't work. Check your authenticator app and try again.	On **My space › MFA**: the code is wrong.	Type the code currently shown by the app.

What you see	What it means	What to do
Your organization requires two-factor authentication, so it cannot be turned off.	On **My space › MFA**, while turning it off: your company requires two-factor authentication.	Keep it on. To move it to a new phone, see the last rows of this table.
We could not check your organization's policy. Nothing was changed; try again later.	On **My space › MFA**, while turning it off: Cogneris could not confirm your company's policy, so it refused.	Try again later.
Enter the 6-digit code. / *The code must be 6 digits.*	On **My space › MFA**: the code is empty or not 6 digits.	Type the 6 digits from the app.
Failed to load data.	**My space › MFA** could not read your status.	Reload the page.
Unable to start MFA setup. Please sign in again.	**MFA setup required** could not start.	Sign in again.
Too many attempts. Try again in … seconds.	Too many codes were tried.	Wait for the countdown, then try again.
The code could not be verified. Try again.	SAML verification: the code is wrong.	Type a current code or an unused backup code.
Too many attempts. Wait a moment before trying again.	SAML verification: too many tries.	Wait, then try again.
Verification is temporarily unavailable. Try again.	SAML verification could not be done.	Try again.

What you see	What it means	What to do
This verification request is no longer valid. Return to sign in.	The SAML verification page expired (5 minutes) or was opened without a sign-in.	Select **Return to sign in** and sign in again.
We could not continue securely. Return to sign in.	The SAML sign-in could not resume after the code was accepted.	Select **Return to sign in** and sign in again.
Your account needs two-factor setup before you can decline. Finish the setup, then open the invitation link again.	You tried to decline an invitation, and your company requires two-factor authentication you have not set up.	Set it up, then open the invitation link again.
You lost your phone and your backup codes.	You cannot finish signing in without a code.	Ask a company administrator to reset your two-step verification (**Teams › Manage access › Reset MFA**). You receive an e-mail when it is done; then sign in with your password and, if your company requires it, set up two-step verification again with your new phone.
You lost your phone but have backup codes.	Each backup code works once.	Sign in with a backup code, then in **My space › MFA** turn two-factor authentication off and on again with your new phone. Turning it off needs a code from the authenticator app, and is refused while your company requires two-factor authentication; in either case, contact Cogneris support.

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Your team

> **NOT YET CHECKED ON THE PRODUCT**
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Content status: From source; not observed (admin-fe a915204, platform-fe 23fec6d, 2026-10-22; updated for WOR-172).

Your team is the people of your company who use Cogneris. This chapter covers inviting them, giving them a profile, and removing them. What each profile allows is in Profiles and what they allow. The rest of company administration is in the administrator manual.

Before you start

- You are signed in as a company administrator: the **Customer administrator** profile. Nobody else in your company is offered this screen.
- Open **Company administration** › **Organization** › **Teams and permissions**. The page **Teams** opens — *Manage your team members and invitations*.

The team list

While it loads the page shows *Loading team members…*. Then it lists every member and every pending invitation:

Column	What it shows
Name	The person's name, with the e-mail address under it. A person who has not finished sign-up shows the e-mail address only.
Role	The company role chosen at the invitation: **Admin** or **Member**.
Status	**Active**, **Pending** (invited, not joined yet), **Inactive** (removed or deactivated), **Blocked** (blocked for security, with the reason under it: **Maximum**

Column	What it shows
	attempts, **Inactivity** or **Manual**), or **Unknown** (the security status could not be read).
User role	The person's profiles. **No access** means an active member with no profile, who cannot open anything.
Actions	**Manage access**, and **Cancel invitation** on a pending invitation.

Above the list you can search by **Name**, filter by profile (**All roles**) and by status (**Any status**). The line *Showing … of …* counts the result; *No team members match these filters.* means the filters hide everyone. An empty team shows *No team members found.*

If the page shows *Security status is temporarily unavailable. Refresh before changing security access.*, the **Status** column could not be confirmed for some accounts; reload the page before acting on them.

Invite a member

1. Select **Invite Member**. The **Invite Member** dialog opens.
2. Type the person's **Email** (required).
3. Choose the **Role**:
   - **Member** — no product is opened for them yet; you choose their module access later.
   - **Admin** — the person becomes a company administrator when they join, and all their module access is turned on.
4. Select **Send Invite**. If the address is empty, nothing happens.

Expected result: the dialog closes, the page shows *Invitation sent successfully!*, and the person appears in the list with the status **Pending**. Cogneris sends them an invitation e-mail (see What the invited person receives).

The invitation does not give a profile. When the person has joined, they show **No access** until you give them a profile; see Change a member's profile.

Resend or cancel an invitation

An invitation stays valid for 7 days.

- **Resend.** Select **Manage access** on the pending invitation, then **Resend invitation** under **Danger zone**. Cogneris sends a new e-mail with a new link, valid for 7 more days; the link in the earlier e-mail stops working. The page shows *Invitation resent.*
- **Cancel.** Select **Cancel invitation** on the row, or under **Danger zone** in **Manage access**. The page shows *Invitation cancelled.* and the invitation leaves the list.

To invite the same address again while an invitation is still pending, resend it instead.

Change a member's profile

1. Select **Manage access** on the member's row. The **Manage access** dialog opens with the member's name and e-mail address.
2. Under **User role**, tick the profiles the member should hold and untick the others. The hint reads *Roles describe what someone does. Module access is granted separately.* A member with no profile shows *This person cannot open anything yet: inviting someone does not assign a user role, and module access alone grants nothing. Pick a role here, then ask them to sign in again so it takes effect.*
3. Under **Module access**, tick the products the member may open: **Portal**, **Workflow**, **Document Center**, **Vision**, **Sign**, **Templates**, **Tickets**, **Company administration**. The counter beside the title shows how many are on. **Grant all** and **Revoke all** tick or untick every product.
4. Select **Save**. **Cancel** closes the dialog without saving.

Expected result: the dialog closes, the page shows *Changes saved.*, and the list shows the new profiles under **User role**. Ask the member to sign in again: their profile is read at sign-in.

Things to know:

- You can give profiles only to members who have joined. On a pending invitation the **User role** boxes are disabled; you can still set its **Module access**.
- The profiles offered depend on the member: the six company profiles, **Ticket operator**, and the four **Housing Credit** profiles under their own heading. **External compliance auditors** and any profile your company created are not offered here.
- Ticking **Customer administrator** makes the member a company administrator and turns all their module access on. Unticking it removes their administrator rights and their **Company administration** module access, and ends their open sessions.
- The company's owner must stay an administrator, and the company must keep at least one active administrator; Cogneris refuses a change that breaks either rule, without changing anything. The owner is the member whose e-mail address is the company's e-mail address.

- If the dialog stays open with *Saved, but the server adjusted some modules. The list below shows what was applied.*, Cogneris kept a different module access from the one you ticked. The boxes now show what was saved.

Remove a member

1. Select **Manage access** on the member's row.
2. Under **Danger zone**, select **Remove user**. The button is disabled for a pending invitation (cancel it instead), for your own account, for the company's owner, and for a member who is not **Active**.
3. The **Remove user** dialog asks *Are you sure you want to remove … (…) from the team?* with the member's name and e-mail address, and warns *They lose access to Cogneris immediately. You can invite them again at any time.* Select **Confirm**, or **Cancel**.

Expected result: the page shows *User removed.* The member's open sessions end and they lose access to Cogneris at once. Their status becomes **Inactive**. You can invite the same address again later.

Deactivate or reactivate a member

Deactivating takes a member's access away for a while without removing them: they cannot sign in, and their profiles, module access and data are kept.

1. Select **Manage access** on the member's row.
2. Under **Danger zone**, select **Deactivate user** (an **Active** member) or **Reactivate user** (a member you deactivated). Neither is offered for a pending invitation, your own account or the company's owner.
3. The dialog shows the member's name and e-mail address. When deactivating it warns *They lose access to Cogneris until an administrator reactivates them. Their data and settings are kept.* Select **Confirm**, or **Cancel**.

Expected result: the page shows *User deactivated.* or *User reactivated.*, and the member's status becomes **Inactive** or **Active**.

Cogneris refuses, without changing anything, to deactivate the last active administrator (*The organization must keep at least one active administrator.*) or a member who has not created an account (*Only members with an account can be deactivated.*). **Reactivate user** brings back only members deactivated from this screen (*Only members deactivated from Teams can be reactivated here.*); a removed member must be invited again (*Removed members cannot be reactivated or suspended. Invite them again instead.*).

Block or unblock a member (Cogneris platform administrators)

Blocking is a security action, different from deactivating: it ends every open session at once and stops the person from signing in. Cogneris also blocks accounts by itself after too many failed attempts or a long inactivity. On the Teams screen, **Block user** and **Reactivate blocked user** are offered only to Cogneris platform administrators, and only while the security status can be read.

- **Block user** asks you to confirm: *Blocking this user immediately revokes all active sessions and prevents sign-in until an administrator reactivates the account.* The page then shows *User blocked successfully.* and the status **Blocked**.
- **Reactivate blocked user** asks you to confirm: *Active sessions remain revoked. The user will receive an email with a secure password-reset link and must set a new password before signing in.* The page then shows *Blocked user reactivated successfully.*

If your company needs a member blocked or unblocked, ask your Cogneris contact.

Reset a member's two-step verification

Use this when a member lost both the authenticator app and the backup codes and cannot sign in.

1. Select **Manage access** on the member's row.
2. Under **Danger zone**, select **Reset MFA**.
3. The **Reset two-step verification** dialog asks *Reset two-step verification for … (…)?* with the member's name and e-mail address, and explains *Use this when the member lost both the authenticator app and the backup codes. They are told by e-mail and, if your company requires two-step verification, set it up again the next time they sign in.* Select **Reset MFA**, or **Cancel**.

Expected result: the drawer shows *Two-step verification was reset. The member was notified by e-mail.* The member receives an e-mail saying an administrator reset two-step verification on the account. If the reset worked but the e-mail could not be sent, the drawer shows *Two-step verification was reset, but the notification e-mail could not be sent. Let the member know.* The member's open sessions are not ended.

The action is refused with a message when:

- it is your own account (*You cannot reset your own two-step verification here. Use your MFA settings instead.*);

- the member has not set up two-step verification (*This member has no two-step verification to reset.*);
- it is the company's break-glass account for SAML sign-in (*The break-glass account keeps its two-step verification.*).

Every reset is recorded in the security audit log with you as the actor.

What the invited person receives

The person receives an e-mail from Cogneris, written in the language of the administrator who invited them: Portuguese (Brazil) or English. When that language is not known, the e-mail is in English. In English the subject is *You have been invited to Cogneris*; in Portuguese, *Você foi convidado para a plataforma Cogneris*. It shows your company's name, the role (**Administrator** or **Member**; in Portuguese **Administrador** or **Membro**), their e-mail address and the date the invitation expires, with an **Accept invitation** (**Aceitar convite**) button. A resent invitation follows the language of the administrator who resends it.

The button opens the Cogneris sign-in pages:

- A person without a Cogneris account completes the sign-up (**Complete your sign-up**): name, phone, acceptance of the **Terms of Service** and **Privacy Policy**, then a code sent by e-mail (**Verify your email**) and a password (**Create a strong password**).
- A person who already has an account sees **You have an invitation** and selects **Join this organization**. They can choose **Create my own organization instead**.

After joining, they sign in as usual, and set up two-factor authentication when Cogneris asks for it. Until you give them a profile, they cannot open any product.

Common problems

What you see	What it means	What to do
This user has already been invited.	The address is already an active member, or has an invitation that has not expired	Find the person in the list. For a pending invitation, use **Resend invitation**.
Failed to send invitation.	The invitation was not created	Check the address and try again.

What you see	What it means	What to do
Failed to load team members.	The list could not be loaded	Reload the page.
A member shows **No access**	They have joined but hold no profile	Give them a profile, then ask them to sign in again.
A member says a product is missing or not available	Their profile does not include it, or their module access does not	Check both under **Manage access**; see Profiles.
Failed to resend invitation. / *Failed to cancel invitation.*	The invitation could not be changed, for example because it is no longer pending	Reload the page and check its status.
Failed to update the user's role.	The change was not saved, or only partly	Reload the page, check what was applied, and try again.
The organization owner must stay an administrator. The role was not changed.	You unticked **Customer administrator** for the company's owner	Leave the owner as administrator.
The organization must keep at least one active administrator. The role was not changed.	You unticked **Customer administrator** for the last active administrator	Make someone else administrator first.
The administrator role could not be confirmed with billing. Nothing was changed; try again.	The billing service did not answer	Try again later.

What you see	What it means	What to do
This user is not an active member of the organization in billing, so the administrator role could not be granted. Nothing was changed.	The member is not active in your company	Check the member's **Status**.
This user cannot be removed. The organization owner and your own account are protected.	The member is the company's owner, your own account, or the last active administrator	Make someone else administrator first, if that is the reason.
Only administrators can remove users.	Your account is not a company administrator	Ask a company administrator.
User not found in this organization.	The member was already removed, or the list is out of date	Reload the page.
Failed to remove user.	The member was not removed for another reason	Try again.
The person never received the e-mail, or the link expired	The invitation is older than 7 days, or the message was lost	Use **Resend invitation**.

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Profiles and what they allow

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Content status: From source; not observed (admin-fe a915204, platform-fe 23fec6d, 2026-10-22).

This is the canonical home of profiles. Each product chapter states which profile a journey needs and links here. To change someone's profile, see Your team.

What a profile is

A profile says what a person does in your company: administer it, configure the products, review documents, follow the figures, and so on. In Cogneris it decides **which products, menus and screens you are offered**, and the Cogneris services check it again on every request.

Two things together decide what you can open:

- **Your profile.** In the **Teams and permissions** screen it is shown under **User role**, with the hint *Roles describe what someone does. Module access is granted separately.* A person can hold more than one profile; what they can do is the sum of them.
- **Your module access.** Under **Module access**, an administrator ticks the products you may open: **Portal**, **Workflow**, **Document Center**, **Vision**, **Sign**, **Templates**, **Tickets** and **Company administration**.

A product appears in your menu only when one of your profiles allows it, and it opens only when your module access includes it. Module access alone grants nothing: a person with no profile cannot open any product. In the team list such a person shows the badge **No access**.

A company administrator opens **Company administration** without needing that module access.

Your profile is read when you sign in. After an administrator changes it, sign in again for the change to take effect.

Products appear only where your Cogneris environment offers them, whatever your profile.

The profiles

These are the profiles a company administrator can give to the people of your company. The name is the one the interface shows; the internal name appears in a few technical messages and in the reference table at the end.

Profile	What it is for
Customer administrator	Runs the company in Cogneris. Configures every product, manages the team and their profiles, and sees the plan and billing. Holding this profile makes the person a **company administrator**, the condition several services check (for example, publishing journey languages in Portal, or saving Vision guards).
Customer technical team	Configures the products: Portal forms and access links, workflows, Vision templates and developer settings, Templates, Sign envelopes, Document Center. Does not manage the team, the company details or the plan.
Customer finance team	Follows the plan and its costs: **Subscription**, **Invoices**, **Transactions**, **Cost Summary**. Sees the product dashboards.
Company monitoring	Sees the product dashboards. In Workflow, the **Management** menu is offered, but the Workflow service answers it only for a company administrator.
Company operator	Works the Workflow **Human Review** queue, and sees the product dashboards.
Customer security team	Looks after security: **Password Policy**, **Redaction policies**, **Audit Log**, **Device Intelligence**, and the Vision tenant agents.

Profile	What it is for
Ticket operator	Works the ticket queue in **Tickets**, and nothing else.
Housing Credit · **Administrator**, **Policy approver**, **Analyst**, **Reviewer**	The four profiles of the Housing Credit product. They open Housing Credit and nothing else; what each one may do inside it is decided by the product. In the Teams screen they are listed under the heading **Housing Credit**.

External compliance auditors is a separate profile for outside auditors. It only opens **My space**, and it is not offered in the Teams screen.

Cogneris staff accounts have their own profiles, which cannot be given to the people of your company.

What each profile can open

The table shows what the Cogneris menus offer to each profile, and what the services accept. "Yes" means the profile is offered the area and the service accepts it; "—" means it is not offered; "Decided by the service" means the service checks something other than the profile. In every case your module access must also include the product.

Product or area	Customer administrator	Customer technical team	Customer finance team	Company monitoring	Compa operat
Product dashboards (Portal, Workflow, Vision, Sign, Document Center, Tickets)	Yes	Yes	Yes	Yes	Yes

Product or area	Customer administrator	Customer technical team	Customer finance team	Company monitoring	Compa operat
Portal: forms and access links (**My Forms**, **Preview**, **Access Links**)	Yes	Yes	—	—	—
Portal: **Journey languages** — publish	Yes	View only	View only	View only	View on
Portal: **WhatsApp consents**	Yes	Yes	—	—	—
Workflow: design and publish workflows (**Flow Configuration**)	Yes	Yes	—	—	—
Workflow: review documents (**Human Review**)	Yes	Yes	—	—	Yes; which queues, decided by the service
Workflow: **Management**	Yes	Offered; refused by the service	—	Offered; refused by the service	—
Vision: templates and	Yes	Yes	—	—	—

Product or area	Customer administrator	Customer technical team	Customer finance team	Company monitoring	Compa operat
playground					
Vision: tenant agents	Yes, including saving **Guards**	View only	—	—	—
Vision: developers (API keys, webhooks, logs)	Yes	Yes	—	—	—
Templates	Yes, including delete	Yes, except delete	—	—	—
Sign: envelopes and processes	Yes	Yes	—	—	—
Document Center: drive, inbox, processes, search	Yes	Yes	—	—	—
Tickets: ticket list and new ticket	Yes	Yes	—	—	—
Administration: **Company administration**, **Teams and permissions**, **Plan & Billing** › **Overview**	Yes	—	—	—	—

Product or area	Customer administrator	Customer technical team	Customer finance team	Company monitoring	Compa operat
Administration: **Subscription**, **Invoices**, **Transactions**, **Cost Summary**	Yes	—	Yes	—	—
Administration: **Password Policy**, **Redaction policies**	Yes	—	—	—	—
Administration: **Audit Log**, **Device Intelligence**	Yes	Yes	—	—	—
My space (your own profile, password, MFA, privacy preferences)	Yes	Yes	Yes	Yes	Yes

Notes on the table:

- **Journey languages.** Everyone with Portal can open the page; only a company administrator can publish. Anyone else sees *Only tenant administrators can change journey languages and texts. You can review the settings here.* See Portal screens.
- **Human Review.** A reviewer allocated to specific review queues sees only the documents in those queues; a reviewer with no queue allocated sees all of them. See Workflow.
- **Workflow Management.** The menu is offered to the technical team and to monitoring, but the Workflow service answers *Management reporting requires an administrator role.* to anyone who is not a company administrator.

- **Vision.** The Vision menu itself is not filtered by profile. For templates the Vision service checks that your membership is active and includes Vision, not your profile. See the Vision administration overview.
- **Vision tenant agents.** Every member can open the page; only a company administrator can save **Guards** or submit a verdict on **Review**.
- **Templates.** Deleting a template needs a company administrator. See the Templates administration overview.
- **Administration.** Most administration screens outside **My space** also need the **Company administration** module access.

For the detail of each screen, see each product's own chapter: Portal, Workflow, Sign, Document Center, and in the administrator manual Workflow administration screens, Vision, Templates and Document Center administration screens.

See your profile

1. Open **My space** › **Personalization**.
2. Under your name and e-mail address, Cogneris lists every role your session carries, one per chip.

Each chip shows the profile name (for example **Customer administrator**; a Housing Credit profile shows the product first, as in **Housing Credit · Administrator**). A role Cogneris has no name for, such as a profile your company created, is shown by its internal name; the reference table below lists the internal names. A company administrator also sees everyone's profiles in **Teams and permissions**, under **User role**.

When you open a product your module access does not include, Cogneris shows **… is not available to your account** — *Your account does not have the … permission.* — followed by *Ask your company administrator to grant it in Teams.* (or, if you are a company administrator, *You are a company administrator: you can grant it yourself in Teams.* with an **Open Teams** button). A page your profile does not allow shows **This page cannot be opened**.

Ask for a different profile

Only a company administrator (the **Customer administrator** profile) can change profiles and module access. Ask the administrator of your company, telling them which product or screen you need. They follow Change a member's profile.

When they have saved the change, sign in again: the new profile is read at sign-in.

Reference: internal names

Profile	Internal name
Customer administrator	`customer-admin`
Customer technical team	`customer-tech`
Customer finance team	`customer-billing`
Company monitoring	`customer-monitoring`
Company operator	`customer-operator`
Customer security team	`customer-security`
Ticket operator	`tickets.operator`
Housing Credit · Administrator, Policy approver, Analyst, Reviewer	`housing-credit.admin`, `housing-credit.policy-approver`, `housing-credit.analyst`, `housing-credit.reviewer`
External compliance auditors	`auditor`
Company administrator (not a profile; held by a Customer administrator)	`tenant.admin`

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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

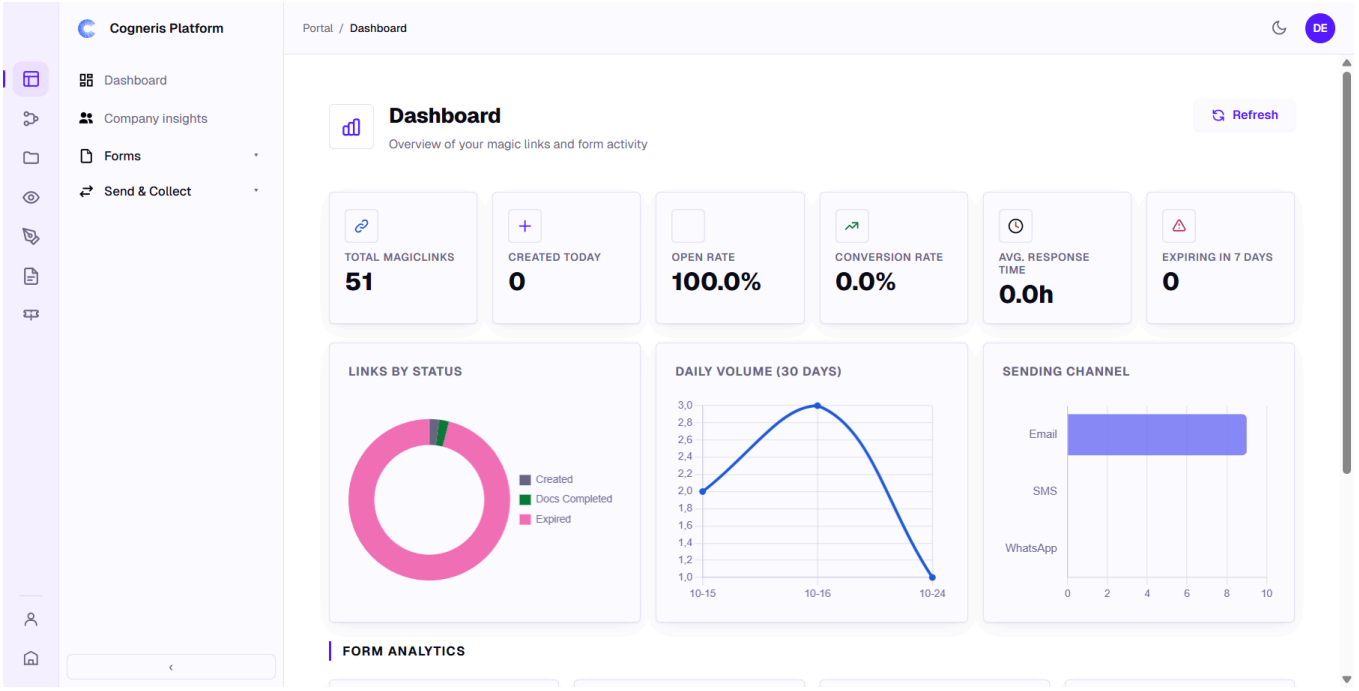
Every person with access to Portal sees the **Dashboard**. **My Forms**, **Preview** and **Access Links** are meant for the **administrator** and **technical team** profiles: the menu hides them for other profiles, and Portal refuses their actions to anyone else. If an item described here is missing 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 *None (create without sending)*, 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). *Open in editor* 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.

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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.

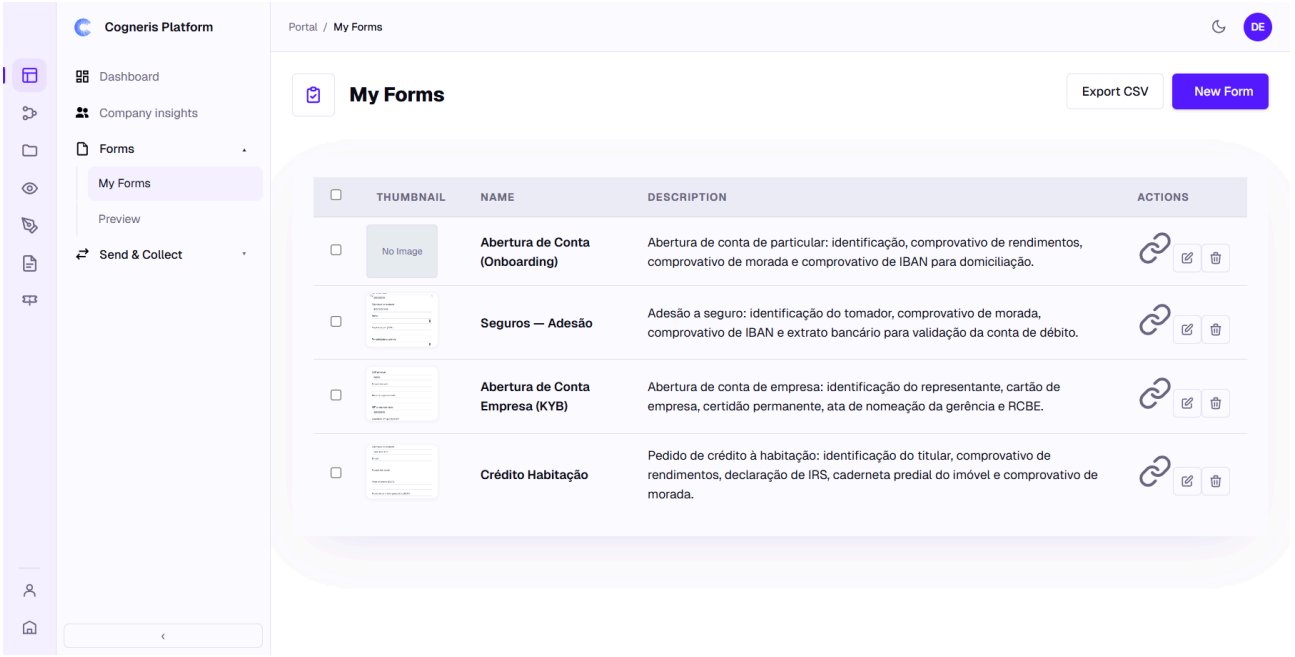
Before you start

- 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

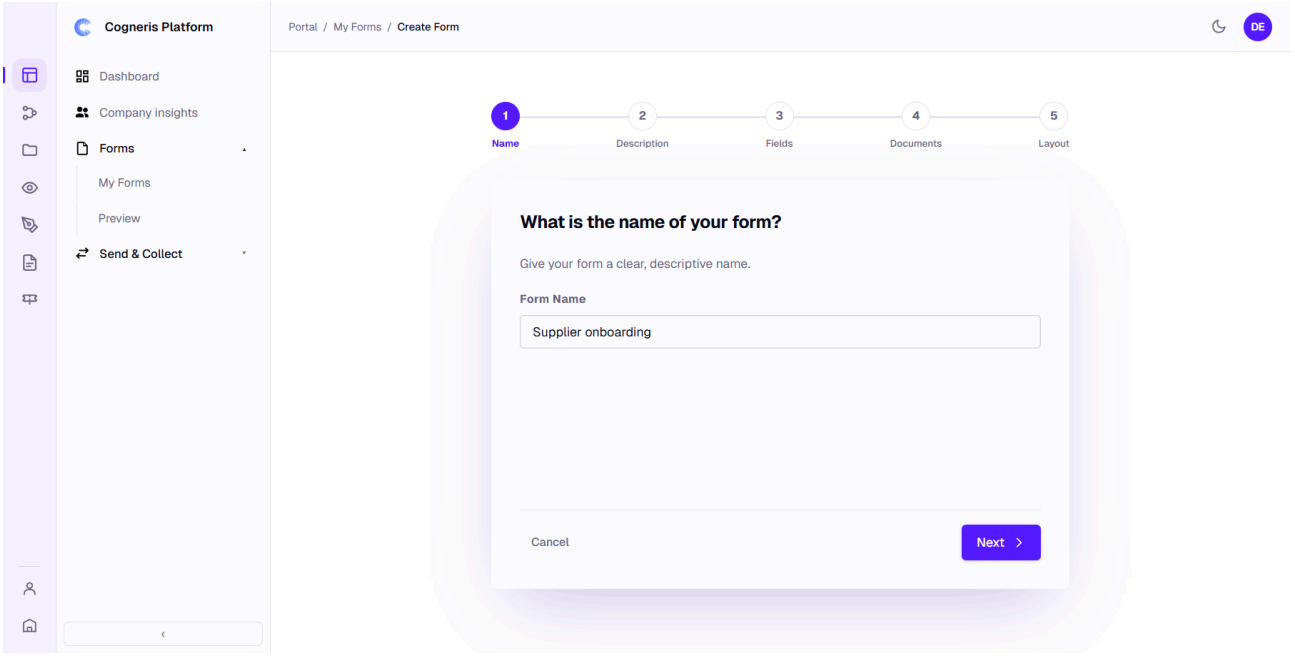
Create the form with the wizard

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**.

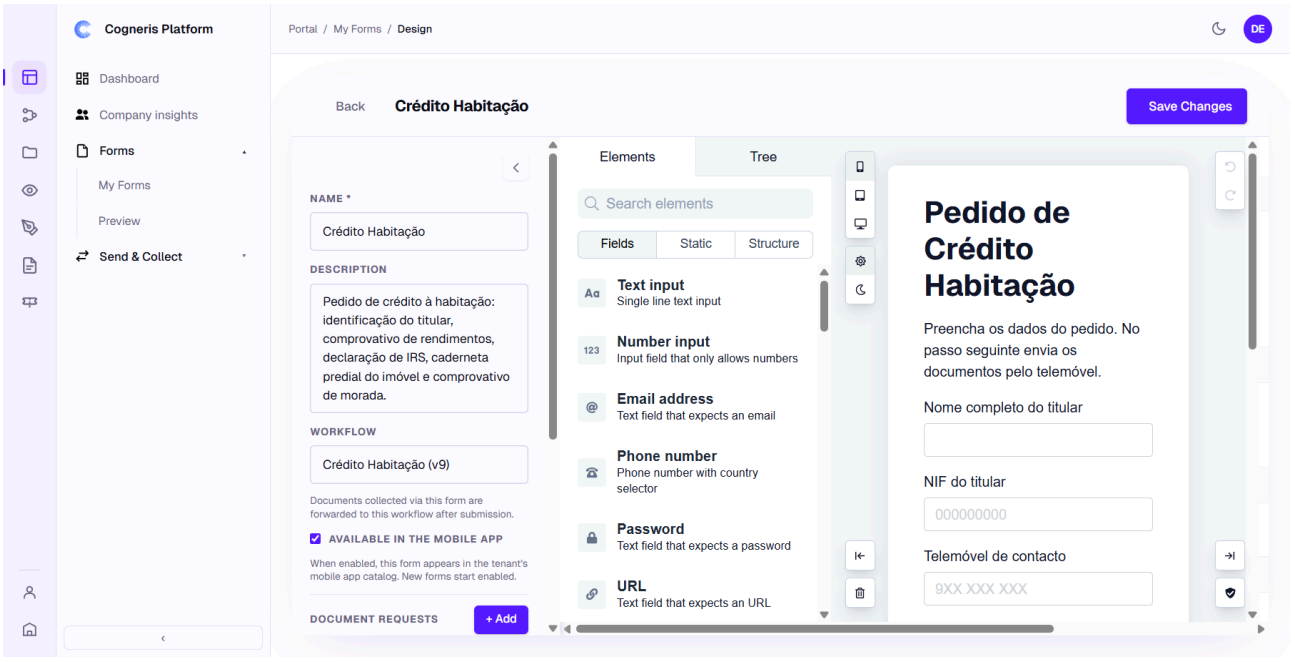
5. **Fields** — Portal proposes the form's sections and fields as text (*Suggested Sections & Fields*). Edit the text to add, rename or remove fields, then select **Next**.

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:

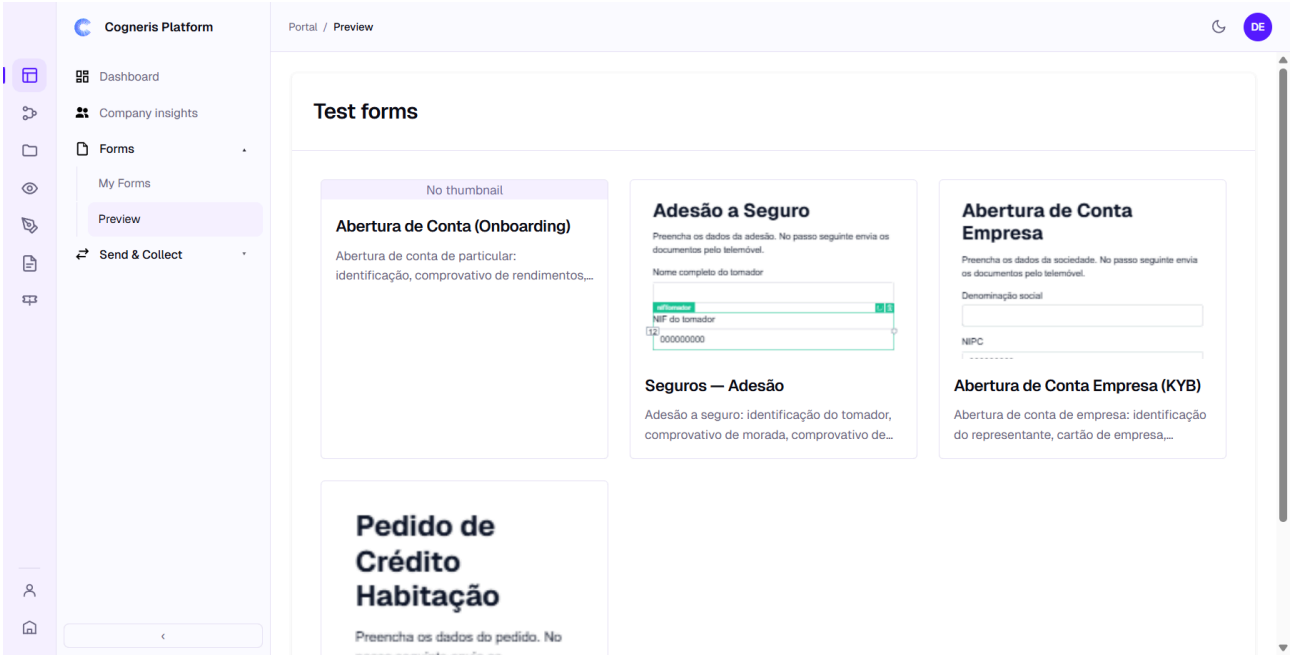
    - **Title *** — what the recipient sees, for example *Identity document* (up to 50 characters).
    - **Description *** — a short instruction shown under the title.
    - **Types Allowed *** — the kinds of document accepted for this request.
    - **For Each *** — the name of a form field whose answers 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 (*Open in editor*) 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
Error calling AI. Make sure prompt.form_description is configured... (or *prompt.suggestion_fields*, *prompt.request_documents*)	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.
Failed to generate form. Please try again. on the **Layout** step	The form could not be generated from the suggestions	Select **Retry**, or go **Back** and simplify the **Fields** text.
Name must be 50 characters or less.	The name is too long	Shorten it and select **Save Changes** again.
Failed to save changes.	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.

What you see	What it means	What to do
This form has no content correctly saved. 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

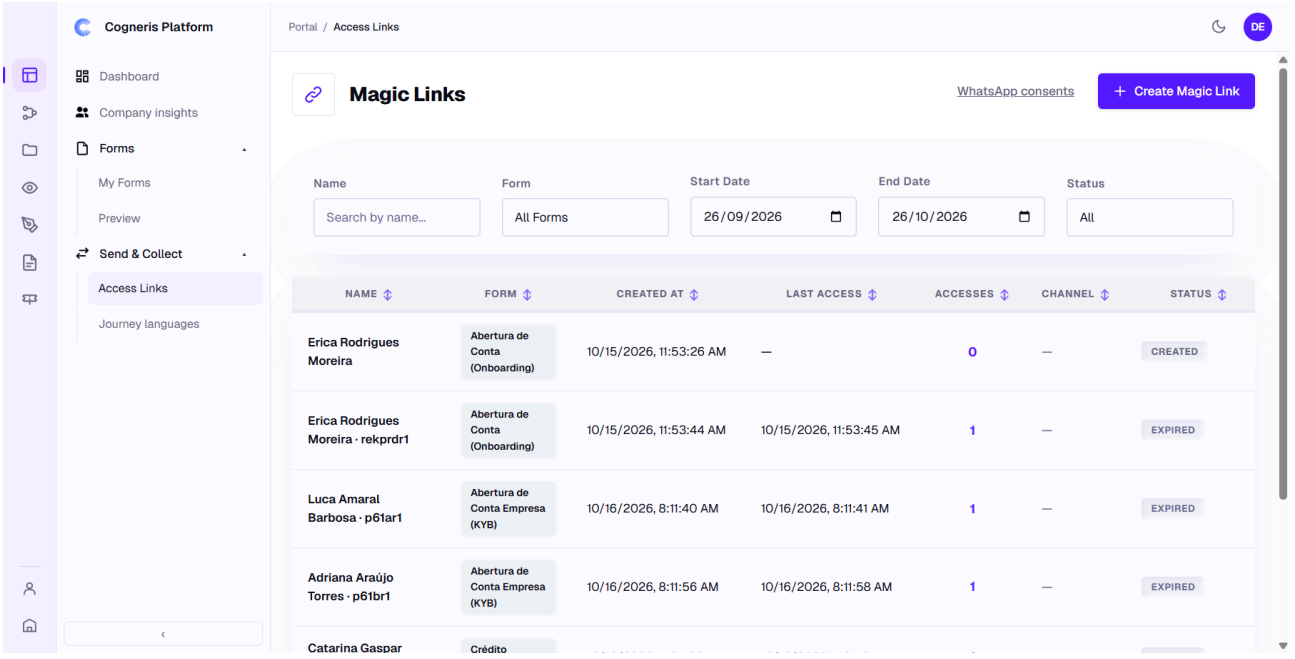
Use this journey to ask one person to fill in a form and send their documents.

Before you start

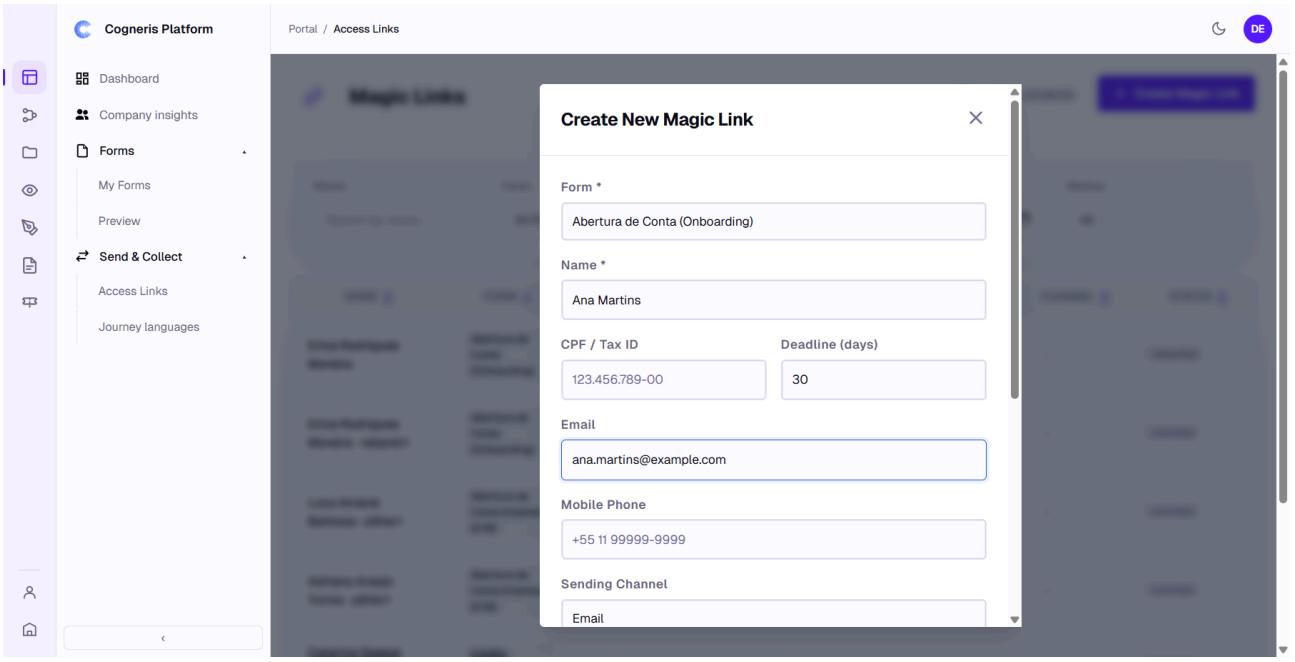
- You are signed in with the **administrator** or **technical team** profile, and **Send & Collect › Access Links** appears in the Portal menu.
- The form exists; see Prepare a form.
- You know how to reach the person: an **e-mail address** (up to 50 characters) for e-mail, or a **mobile phone number** 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.

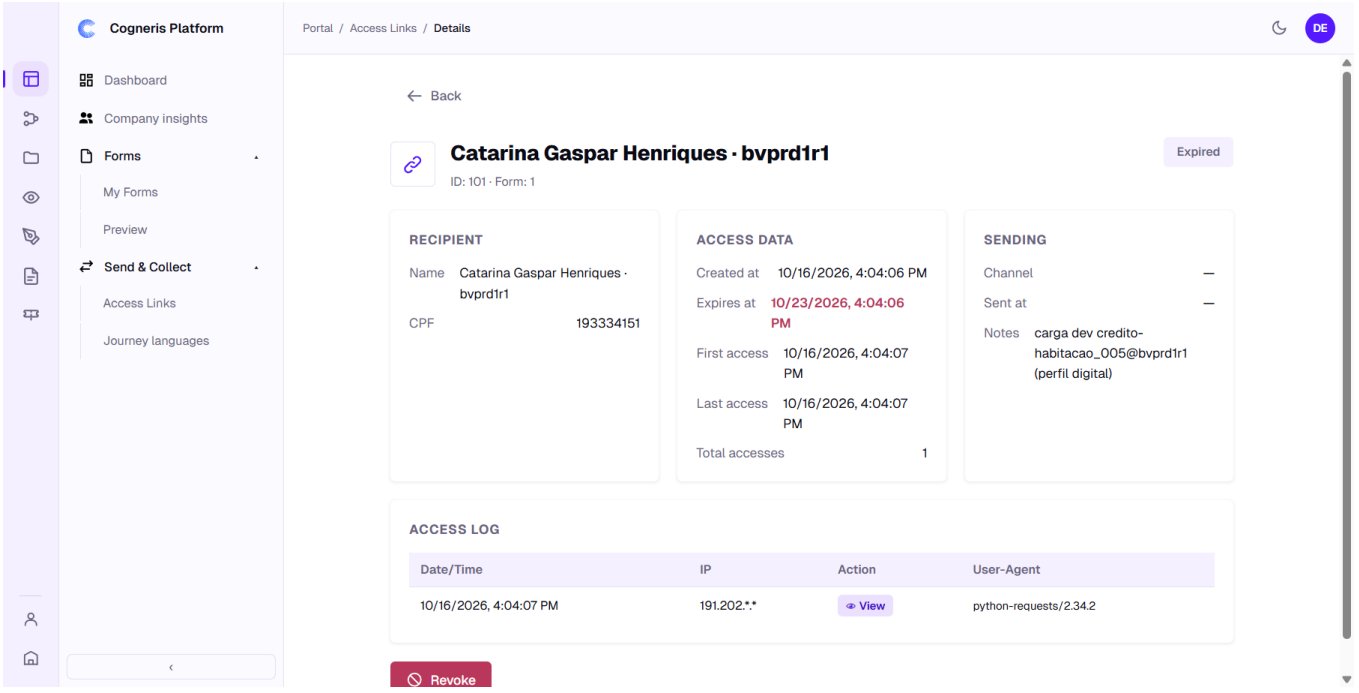
Expected result

- 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
Form and Name are required fields.	A required field is empty	Choose the form and type the name.
Email address must be 50 characters or fewer.	The e-mail address is too long	Use a shorter address, or another channel.
Record the consent before sending on WhatsApp.	WhatsApp needs a recorded consent	Complete the consent fields (step 4), or choose another channel.
This number opted out of WhatsApp. Choose another channel.	The person asked to stop WhatsApp messages	Use **Email** or **SMS**.
Magic Link created, but sending failed. Copy the link below or try resending.	The link exists but the message did not reach the person	Copy the link from the dialog and send it yourself, or send it again later.
Failed to create Magic Link.	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.
Failed to load form options.	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 cannot be changed: they are marked **Already approved**, or **Awaiting review** while the reviewer has not decided on them yet.
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.

What you see	What it means	What to do
Access Limit Reached	The link was opened as many times as allowed	Contact the sender for a new link.
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.
Could not submit the form. Your answers are still here. Please try again.	The form was not sent	Select **Submit** again.
Document capture failed. Please try again.	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.
Could not finalize your submission. Please try again.	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 or for a link past its deadline.
2. In **Resend Magic Link**, choose the **Sending Channel**: **Email**, **SMS** or **WhatsApp**. It starts on the channel the link was last sent on.
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
Error loading Magic Links.	The list could not be loaded	Reload the page.
No magic links found for the selected filters.	No link matches	Clear the filters or widen the dates.
A Portuguese message such as *Não é possível reenviar um link expirado.* after **Resend**	The resend was refused: the link expired (*expirado*) or was revoked (*revogado*)	Create a new link.
Não há consentimento de WhatsApp registado para este número… or *…pediu para não receber mais mensagens no WhatsApp…*	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.
Falha ao enviar. Verifique o canal e os dados de contato.	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.
Error revoking. or *Error deleting Magic Link.*	The action was not done	Try again; if it persists, check that your profile allows managing links.
Token unavailable.	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. On 2026-10-22 the fields, actions and messages of *Magic Links*, the *Create New Magic Link* dialog, the link details, *WhatsApp consents* and the *Recipient's page* were checked against the Portal interface source (`c6b27f7`); those details are marked as not observed in each screen's *Content status*. On 2026-10-22 the same was done for the *Dashboard*, *Company insights*, the support pages, *My Forms*, the form wizard, the form editor and *Preview* (Portal interface `01e16b4`). Screens still marked *From source; not observed* were not exercised; the form editor carries a known defect. On 2026-10-23 the behaviour changed by WOR-156 and WOR-157 (Portal interface pull request #214) was updated from that change; it has not been observed.

Screenshots are not included in this edition.

Menu

Item	Opens	Who sees it
Dashboard	Dashboard	Everyone with access to Portal
Company insights	Company insights	Everyone with access to Portal; the data loads only for a company administrator

Item	Opens	Who sees it
Forms › My Forms	My Forms	**Administrator**, **technical team**
Forms › Preview	Preview	**Administrator**, **technical team**
Send & Collect › Access Links	Magic Links	**Administrator**, **technical team**
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

Overview of your magic links and form activity, for the whole company.

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). Field details checked against the Portal interface source (`01e16b4`) on 2026-10-22; not observed.

The screen has no filters: the periods below are fixed, and the figures are calculated by the service.

Area	What it shows
Total MagicLinks	Every link of the company
Created today	Links created today
Open rate, **Conversion rate**	Percentages, with one decimal
Avg. response time	Hours, with one decimal (for example `12.5h`)
Expiring in 7 days	Links whose deadline falls in the next 7 days; shown in red when there is at least one
Links by Status	Links per status — **Created**, **Sent**, **Accessed**, **Form Completed**, **Docs Completed**, **Pending**, **Finished**, **Revoked**, **Expired**; only the statuses that have links appear
Daily Volume (30 days)	**Links created** per day, labelled month-day
Sending Channel	**Links by channel**: **Email**, **SMS**, **WhatsApp**
Form Analytics	**Total Submissions**, **Completion Rate**, **Avg. Fill Time** (minutes and hours), **Active Forms**. Not connected yet: every value shows —.
Top Forms by Submissions	**Form Name**, **Total MagicLinks**, **Submissions**, **Completion Rate** (a bar and the percentage; hidden on narrow screens). Not connected yet: shows *No data found.*

Button	What happens	Who can use it	Reversible?
Refresh	Loads the figures again; reads **Loading…** meanwhile	Everyone who sees the screen	— (nothing changes)

Message	Cause	What to do
Failed to load metrics.	The figures could not be loaded	Select **Refresh**; if it persists, contact support
Could not refresh. The figures below are from ….	A **Refresh** failed; the figures on screen are the ones loaded at that time	Select **Refresh** again; if it persists, contact support
— on every counter	The figures have not arrived yet, or the service sent none	Wait, or select **Refresh**

Company insights

Sign-in activity of your company — *Activity over the selected period*.

How to get here	Menu **Company insights**
Who sees it	Everyone can open it; the data loads only for a company administrator
Content status	Observed (2026-10-18, by a company administrator and by a profile without administrator access). Field details checked against the Portal interface source (`01e16b4`) on 2026-10-22; not observed.

Fields

Field	What it does	Values	Default
Period	The period every figure covers	**Last 24h**, **Last 7 days**, **Last 30 days**	**Last 7 days**
Chart / **Table**	How **Logins Over Time** is shown	Chart or table	**Chart**

Figures are kept for 5 minutes: switching back to a period seen in the last 5 minutes shows the same figures. **Refresh**, next to the periods, loads newer ones.

What it shows

Area	Content
Total Logins	Sign-ins in the period
Unique Visitors	Different people who signed in
Events / Visitor	Sign-ins per visitor, as calculated by the service
Logins Over Time	Sign-ins per day (per hour for **Last 24h**), with the **Current period** against the **Previous period**. As a table: **Date**, **Current**, **Previous**.
Access by Country	*Login distribution worldwide* on a map, darker where there are more **logins**; *No data for the selected period* when there are none
Access Heatmap	*Login activity by day of week and hour*: a cell per weekday and hour, from **Less** to **More**; the tooltip gives the count
Top Origins, **Top Browsers**, **Top Countries**	The most frequent origins, browsers (**Other** groups the rest) and countries, with bars; *Not enough data to display* when empty

Every figure counts sign-ins to the company's accounts, not calls to the Cogneris API.

Button	What happens
Refresh	Loads the figures of the selected period again, skipping the 5-minute copy
Sign in again	Shown with *Your session has expired…*; opens the sign-in page and comes back here

Common problems

Message	Cause	What to do
This page requires company administrator access. Ask an administrator at your company to grant it.	You are not a company administrator	Ask an administrator, or have one look at the page
Your session has expired. Please sign in again to view this page.	The service did not accept your session	Select **Sign in again**
This resource is no longer available. It may have been moved or deleted.	The service did not find the data	Contact support
Could not load data. The backend endpoint may not be available yet.	Any other failure	Reload the page; if it persists, contact support
The figures do not change	They are kept for 5 minutes	Select **Refresh**

My Forms

Every form of the company. Used by Prepare a form.

How to get here	Menu **Forms › My Forms**
Who sees it	**Administrator**, **technical team**; anyone else is sent to the *Dashboard*
Content status	Observed (2026-10-18, by a company administrator). Field details checked against the Portal interface source (`01e16b4`) on 2026-10-22; not observed.

Column	Content
(box)	Selects the form for bulk delete; the box in the header selects every form. Not shown on narrow screens.
Thumbnail	Picture of the form, or *No Image*
Name, **Description**	As saved in the editor; - when there is no description
Actions	**Workflow**, *Open in editor*, *Delete*

The list has no search, sort or paging.

Buttons and actions

Button	What happens	Reversible?
New Form (or **Create Form** when the list is empty)	Opens the form wizard	—
Export CSV	Downloads the list (*Export forms as CSV*) with the columns `ID`, Name and Description. Disabled when the list is empty.	—
Workflow → **Save Changes**	Sets the workflow that receives the submissions: *Documents collected via this form are forwarded to this workflow after submission.* Choose a workflow (*name (vN)*) or **None**. *Form updated successfully* confirms it.	Yes
Open in editor	Opens the form editor — the design, the details and the document requests	—

Button	What happens	Reversible?
Delete → **Delete**	**Confirm Delete**: *Are you sure you want to delete this form? This action cannot be undone.* Then *Form deleted successfully*.	No
Delete in the selection bar	The browser asks *Delete … forms? This cannot be undone.* (*Delete … form? This cannot be undone.* for one), then deletes them (**Deleting…**), shows *… forms deleted* (*… form deleted*) and reloads the list	No

Common problems

Message	Cause	What to do
No forms found. Create your first form!	The company has no forms	Select **Create Form**
Failed to load forms. in place of the list	The list could not be loaded	Select **Retry**
Failed to delete form.	The form could not be deleted	Try again
Some forms could not be deleted (…). They are still selected.	Some of the selected forms were deleted and others were not. The list is reloaded and only the ones that failed stay selected.	Select **Retry**, or **Delete** again
An error occurred. Please try again. in the **Workflow** dialog	The workflows could not be loaded	Select **Retry**
Failed to save form.	The workflow could not be saved	Try again
The **Workflow** box shows a number instead of a name	The form points to a workflow that no longer exists or that you cannot see	Choose another workflow, or **None**

Form wizard

Creates a form with AI help in five steps — **Name**, **Description**, **Fields**, **Documents**, **Layout** — then opens it in the form editor.

How to get here	**New Form** on *My Forms*
Content status	Observed (2026-10-18, by a company administrator). Field details checked against the Portal interface source (`01e16b4`) on 2026-10-22; not observed. Retry, document-request and description behaviour updated from the WOR-155 fix (portal-fe #211); not observed.

Steps and fields

Step	Field	What it does	Required	Format
Name — *What is the name of your form? Give your form a clear, descriptive name.*	**Form Name**	The form's name	Yes — **Next** stays disabled until it is filled in	Up to 50 characters, for example *e.g. Employee Onboarding Form*
Description — **Form Description**	The description	*AI generated a description based on the form name. You can edit it.* Written when you first come from **Name**. Going back and forward again keeps it; it is rewritten only if it is empty, or if you changed the name	No	Free text (*Form description…*)

Step	Field	What it does	Required	Format
		and did not edit the text.		
Fields — Suggested Sections & Fields	The suggestion	*AI suggested form sections and fields. You can edit them before generating.* Written only when empty; changing the description afterwards does not update it.	No	Free text (*Field suggestions…*)
Documents — Required Documents	One line per document	*AI suggested the documents to request. Add, rename or remove items before continuing.* **Add document** adds a line; × removes one. Empty lines are ignored.	No	Up to 50 characters per document (*Document type…*)
Layout — Choose a Layout	**Single Page** or **Multiple Steps**	*Select how the form will be presented to the user.*	Yes	**Single Page** by default

While the AI writes, the step shows *Generating description…*, *Generating field suggestions…* or *Generating document list…*.

Buttons and actions

Button	What happens	Reversible?
Next, **Back**	Move between steps. **Next** is disabled while the AI writes or after an error.	—
Cancel	Only on the first step: returns to *My Forms* without saving	—
Retry	Asks the AI again after an error. After **Create Form**, continues from the step that failed — it never creates a second form	—
Create Form	Generates the form from the **Fields** text and the chosen layout (**Creating…**), saves it with one document request per document — each required, accepting PDF, JPG and PNG — and opens the form editor. Each document repeats for every value of a text field of the form (a tax ID, else a name, else the first text field, preferring one inside a list); with no text field it is asked once. Once the form exists, **Back** is disabled and the step says *The form has already been created. Retrying continues from the step that failed.*	The form can be deleted on *My Forms*
Open the editor without documents	Shown only when the document requests could not be saved: opens the form editor with the form as created, without them	Add the requests in the form editor

Common problems

Message	Cause	What to do
Error calling AI. Make sure portal_describe_form is configured in Administration > AI > Prompts. — or `portal_suggest_fields`, `portal_request_documents`	The AI prompt for that step is not configured for the company,	Ask an administrator to configure the prompt named in Administration › AI ›

Message	Cause	What to do
	or the AI did not answer	Prompts, then select **Retry**
Error generating the form with AI. Make sure portal_generate_form is configured in Administration > AI > Prompts. after **Create Form**	The form could not be generated, or it could not be created or saved	Select **Retry**: it continues with the same form
The form was created, but its document requests could not be saved.	The form exists; its document requests do not	Select **Retry**, or **Open the editor without documents** and add them in the form editor
Another message after a step	The service refused the request and says why	Correct what the message says and try again

Form editor

How to get here	**Create Form** at the end of the wizard, or *Open in editor* on *My Forms*
Who sees it	**Administrator**, **technical team**
Content status	From source; not observed (Portal interface `01e16b4`, 2026-10-22)

KNOWN DEFECT — XTRAK-2594

The form editor does not open: *Open in editor* 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*.

Area	Content
Header	**Back** (to *My Forms*, without asking about unsaved changes), the form name (**Edit Form** until it loads), **Save Changes**
Builder	The visual form builder, with its own **Save**, undo and redo. Its interface is in English. *Loading form builder…* while it opens.
Details panel	Closed when the page opens; *Expand details panel* opens it and *Collapse details panel* closes it

A new form starts with a title, a **Name** field (*John Doe*), an **Email** field (*johndoe@gmail.com*) and **Submit**. The steps of a multi-step form are named **Step 1**, **Step 2** and so on unless they have a title. The builder's own **Save** keeps the design only in the page: nothing reaches Cogneris until **Save Changes**. Opening the editor does not save anything — the form's picture on *My Forms* is updated by **Save Changes**.

Details

Field	What it does	Required	Format	Default
Name *	The form's name (*Enter form name*)	Marked required; the screen does not check it	Up to 50 characters	As saved
Description	*Enter form description*	No	Up to 250 characters	As saved
Workflow	*Documents collected via this form are forwarded to this workflow after submission.*	No	**None** or a workflow (*name (vN)*)	As saved

Field	What it does	Required	Format	Default
Available in the mobile app	*When enabled, this form appears in the tenant's mobile app catalog. New forms start enabled.*	No	Box	Ticked

Document Requests

Each document the recipient is asked for. Requests are saved immediately with their own **Create**, **Update** or **Delete** — they do not wait for **Save Changes**. *No document requests.* when there are none.

Field	What it does	Required	Format	Default
Title *	Shown to the recipient. A title containing "selfie" makes the request a selfie: camera only, no image-quality check.	Yes	Up to 50 characters	Empty
Description *	Instruction shown under the title	Yes	Up to 255 characters	Empty
Types Allowed *	The kinds of document accepted	Yes	Free text, up to 2000 characters — the wizard writes `.pdf,.jpg,.jpeg,.png`	Empty
For Each *	The form field whose values repeat the request — one	Yes	A field name, up to 50 characters	Empty

Field	What it does	Required	Format	Default
	request per value			
Validation	Validation rule	No	Up to 255 characters	Empty
Optional	The recipient may skip the document	No	Box	Not ticked

Create / **Update** stays disabled until the four required fields are filled in.

Buttons and actions

Button	What happens	Reversible?
Save Changes	Saves name, description, workflow, mobile setting and design (**Saving…**): *Changes saved!*	Yes, by editing again
+ Add, *Edit*	Opens **Add Document Request** or **Edit Document Request**	—
Delete → **Delete**	**Confirm Delete**: *Are you sure you want to delete this document request?*	No

Common problems

Message	Cause	What to do
Failed to save changes.	Name and details or design could not be saved — one may have been saved without the other	Select **Save Changes** again
Name must be 50 characters or less.	The name is too long	Shorten it

Message	Cause	What to do
Could not save the document request. (the dialog stays open) or *Could not delete the document request.* — or the service's reason	The request could not be saved or deleted	Correct what the message says, or try again
Could not load the document requests.	The list of requests could not be loaded	Reload the page
Could not load the workflows. under **Workflow**	The workflows could not be loaded; only **None** is offered	Select **Retry** next to the message
The page returns to *My Forms* on opening	The form could not be loaded	Open it again from *My Forms*

Preview

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

How to get here	Menu **Forms › Preview**
Who sees it	**Administrator**, **technical team**
Content status	Observed (2026-10-18, by a company administrator, up to **Confirm**; **Open Camera** not walked). Field details checked against the Portal interface source (`01e16b4`) on 2026-10-22; not observed.

One card per form, with its thumbnail (*No thumbnail*) and description (*No description provided.*). *Loading forms…* while they load. Selecting a card opens the run page, with **Back to Tests** to return.

The run page shows the form (*Loading form…* first) under the tab **Exported Form**. Its **Submit** — or **Finish** on a multi-step form — comes from the form's design. Submitting builds the

document requests and opens two more tabs:

Tab	Content
Checklist (…)	One card per document request, with **Open Camera**, **Upload File** (picture or PDF; not for selfies), **Retake** and **Delete**, a green check once the file is in, and the same image-quality prompts as the recipient's page (*Analysing document quality…*, **Image quality is low**, **Image quality not ideal**). Under the cards: *… of … documents captured*, **Confirm** and **Back to Form**.
JSON	**Form Data**: the answers as data — after **Confirm**, the capture identifiers instead — with **Copy** (reads **Copied!** for two seconds), and **Back to Checklist**

Confirm enables once every required request has a file and no image is low quality. It shows *Documents captured successfully* and the capture identifiers on **JSON**. Nothing is sent to a workflow: Preview stops at the captures.

Common problems

Message	Cause	What to do
No forms found. Go to the Form Builder to create one.	The company has no forms	Create a form on *My Forms*
Could not load the forms.	The list could not be loaded	Select **Retry**
Could not load the form.	The form could not be loaded	Select **Retry**
This form has no content correctly saved.	The form has no design	Open it in the form editor and select **Save Changes**
The page opens on **JSON** instead of **Checklist**	The form has no document requests	Add document requests in the form editor

Message	Cause	What to do
Could not build the document checklist. Please try again. above the form	The document requests could not be built from the answers	Submit the form again
A card goes back to **Open Camera** / **Upload File** after a capture	The file could not be sent; no message is shown	Capture or upload it again
The document could not be removed. Please try again. on a card	**Delete** was refused; the file is still there	Select **Delete** again

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). Field details checked against the Portal interface source (`c6b27f7`) on 2026-10-22; not observed.

The filters, the sort order and the page are kept in the page address, so a copied address or the browser's **Back** button from a link's details returns to the same list.

Fields

Field	What it does	Required	Format / values	Default
Name (*Search by name…*)	Shows links whose name **or e-mail** contains the text, ignoring case	No	Free text	Empty

Field	What it does	Required	Format / values	Default
Form	Shows the links of one form	No	**All Forms**, or one of the forms that have links in the loaded date range and status	**All Forms**
Start Date, **End Date**	Load the links of this period from the service	No	Dates	The last 30 days, up to today
Status	Loads only the links in this status	No	**All**, **Created**, **Sent**, **Accessed**, **Form Completed**, **Docs Completed**, **Pending**, **Finished**, **Revoked**, **Expired**	**All**

Name and Form filter the links already loaded; dates and status load them again. The screen does not check that the start date is before the end date.

Columns

Column	Content
Name	The recipient's name, which opens the link details, with the e-mail under it
Form	The form the link collects
Created at, **Last Access**	Date and time; — when the link was never opened
Accesses	How many times the link was opened
Channel	The channel it was sent on, as stored (for example `EMAIL`); — when it was not sent

Column	Content
Status	The link's status. A link past its deadline shows **Expired** unless it is already **Revoked** or **Expired**.
Actions	The row actions below

Every column except **Actions** sorts: select the header once for ascending, again for descending. Empty values always come last. The list shows 10 links per page, with *Showing … of …*, *Page … of …*, **Previous** and **Next**.

Buttons and actions

Button	What happens	Who can use it	Reversible?
WhatsApp consents	Opens WhatsApp consents	Shown only to an **administrator** or the **technical team**	—
Create Magic Link	Opens the Create New Magic Link dialog; the list reloads after a link is created	Everyone who sees the screen	—
Copy link	Copies the link. Shown only when the full link is available — in practice never for a saved link	Everyone who sees the screen	—
Resend → **Resend Magic Link**	Asks for the **Sending Channel** (**Email**, **SMS**, **WhatsApp**; preset to the link's own channel, or **Email**) and sends a new link; the old one stops working. Shown unless the link is **Revoked** or past its deadline — the service does not resend an expired link.	Everyone who sees the screen	No

Button	What happens	Who can use it	Reversible?
Revoke → **Confirm**	Cancels the link: *Revoke the Magic Link for "…"? This action cannot be undone.* Shown unless the link is **Revoked** or **Finished**.	Everyone who sees the screen	No
Delete → **Confirm**	Removes the link: *Are you sure you want to delete this Magic Link?* Shown for every status.	Everyone who sees the screen	No

The service decides who may revoke, resend or delete; the screen does not check profiles for these actions. The resend dialog names the link under *Recipient:*. Confirmations: *Resent successfully!*, *Magic Link revoked successfully.*, *Magic Link deleted.*, *Link copied!*

Common problems

Message	Cause	What to do
No magic links found for the selected filters.	Nothing matches the name, form, dates or status	Widen the dates or set **Status** to **All**
Error loading Magic Links.	The list could not be loaded	Reload the page; if it persists, contact support
A form is missing from **Form**	The filter lists only forms that have links in the loaded period	Widen **Start Date** and **End Date**
Error resending., *Error revoking.* or a message from the service	The action was refused or failed. The service's own reason is shown when it gives one.	Read the reason; for a WhatsApp resend, check the number's consent
Error deleting Magic Link.	The link could not be removed	Try again; if it persists, contact support

Create New Magic Link dialog

Used by Send an access link.

How to get here	**Create Magic Link** on *Magic Links*
Content status	Observed (2026-10-18, by a company administrator). Field details checked against the Portal interface source (`c6b27f7`) on 2026-10-22; not observed.

Fields

Field	What it does	Required	Format / values	Default	Example
Form *	The form the recipient fills in and the documents it asks for	Yes	The company's forms; before a choice the box reads *Select a form*	None	—
Name *	The recipient's name, shown in the list and on the link details	Yes	Free text	Empty	*e.g. John Smith*
CPF / Tax ID	The recipient's tax number, kept with the link	No	Free text; not checked by the screen	Empty	*123.456.789-00*

Field	What it does	Required	Format / values	Default	Example
Deadline (days)	Days until the link expires	No	Whole number from 1 to 365; empty means 30	30	15
Email	Where the link is sent with **Email**	For **Email**	An e-mail address, up to 50 characters	Empty	*joao@example.cc*
Mobile Phone	Where the link is sent with **SMS** or **WhatsApp**	For **SMS** and **WhatsApp**	A phone number with country code	Empty	*+55 11 99999-9999*
Sending Channel	Sends the link when it is created	No	**None (create without sending)**, **Email**, **SMS**, **WhatsApp**	**None (create without sending)**	**Email**

Field	What it does	Required	Format / values	Default	Example
Journey language	The language the recipient's page opens in	No; shown only with more than one language enabled in Journey languages	**Tenant default** or one enabled language	**Tenant default** — the recipient's own preference, then the company default	**Português (Brasil)**
Max. Accesses	How many times the link can be opened	No	Whole number from 1; empty means **Unlimited**. Disabled when **Single use** is ticked.	**Unlimited**	3
Single use	Lets the link be opened once	No	Box	Not ticked	—
Notes	Internal notes, shown on the link details	No	Free text	Empty	*Internal notes…*

WhatsApp consent. With **WhatsApp** selected and a phone number, the dialog checks the number:

- *Checking consent for this number…* while it looks.
- *Consent for this number is already on file.* — nothing more to fill in.
- *This recipient asked to stop receiving WhatsApp messages. Use another channel.* — the number cannot receive WhatsApp messages.
- Otherwise, record the consent here. The dialog explains: *The consent must name the business and say the messages arrive on WhatsApp. A recipient can stop them at any time by replying SAIR.*

Consent field	Required	Values	Default
I confirm this recipient authorised receiving WhatsApp messages from us.	Yes	Box	Not ticked
How was it collected?	Yes	**Web form**, **Contract**, **In person**, **Import**	**Web form**
Consent date	No	Date	Today
Where is the proof?	Yes	Free text, for example *e.g. contract 4471, web form #82*	Empty

Buttons and actions

Button	What happens	Reversible?
Create Magic Link	Checks the fields, creates the link and, with a channel, sends it. The dialog then shows **Generated Link!** with *Magic Link created successfully!*, *Generated link:* and the link, **Copy** and a **QR Code** (*Scan to open MagicLink on mobile*).	The link can be revoked
Copy	Copies the link; the button reads **Copied!** for two seconds	—
Cancel, **Close**, ×, Esc	Closes the dialog	Yes

Button	What happens	Reversible?
or a click outside		

Common problems

Message	Cause	What to do
Form and Name are required fields.	**Form** or **Name** is empty	Fill in both
Email address must be 50 characters or fewer.	The address is longer than 50 characters	Use a shorter address, or send by SMS or WhatsApp
This number opted out of WhatsApp. Choose another channel.	The recipient asked to stop WhatsApp messages	Choose **Email** or **SMS**
Record the consent before sending on WhatsApp.	The consent fields are incomplete	Tick the confirmation and fill in **How was it collected?** and **Where is the proof?**
Magic Link created, but sending failed. Copy the link below or try resending.	The link exists but the message did not go out	Copy the link and send it yourself, or use *Resend* on *Magic Links*
Failed to create Magic Link.	The service refused or failed to create the link	Check the fields and try again
Failed to load form options.	The forms could not be loaded	Close the dialog and open it again
Could not generate QR Code., *Could not copy.*	The browser could not draw the code or use the clipboard	Select the link and copy it by hand

Link details

How to get here	Select a name in *Magic Links*
Content status	Observed (2026-10-18, by a company administrator, including **Resend** and **Revoke**). Field details checked against the Portal interface source (`c6b27f7`) on 2026-10-22; not observed.

Area	Content
Header	Name, *ID: … · Form: …* (the form's name), status badge
Recipient	**Name**; **CPF**, **Email** and **Phone** when filled in
Access Data	**Created at**; **Expires at**, in red once past; **First access** and **Last access** (**—** if never opened); **Total accesses**, as *… / …* when the link has a maximum
Sending	**Channel** (as stored), **Sent at**, and **Notes** when filled in
Public Link	The link, with **Copy**. Shown only when the full link is available.
Access Log	**Date/Time**, **IP** (masked), **Action** (**View**, **Upload**, **Resend**, **Revoke** as recorded by the service — resending and revoking were not recorded in DEV on 2026-10-18), **User-Agent** (cut at 60 characters; the full text is in the tooltip)

Buttons and actions

Button	Shown when	What happens	Reversible?
Resend → **Confirm**	Not **Revoked** and not past its deadline	Asks for the **Sending Channel** (preset to the link's own channel, or **Email**) and sends a new link	No

Button	Shown when	What happens	Reversible?
Revoke → Confirm	Not **Revoked** or **Finished**	*Revoke this Magic Link? It can no longer be accessed.*	No
Request support about this process	Support requests are available	Opens a new support request for this link	—
Back	Always	Returns to *Magic Links* with the same filters, order and page	—

Deleting a link is only possible from *Magic Links*. Confirmations: *Resent successfully!*, *Magic Link revoked successfully.*, *Link copied!*

Common problems

Message	Cause	What to do
Error loading Magic Link details. — the page then shows only **Back**	The link could not be loaded, or it was deleted	Go **Back** and reload the list
No accesses recorded.	The recipient has not opened the link	—
Could not load the access log.	The log could not be loaded	Select **Retry** next to the message
Resend is missing	The link is **Revoked** or past its deadline	Create a new link
Error resending., *Error revoking.* or a message from the service	The action was refused or failed	Read the reason and try again

WhatsApp consents

Who authorised your company to message them on WhatsApp, and where the proof lives. Page subtitle: *Who authorised us to message them, and where the proof lives.*

How to get here	**WhatsApp consents** on *Magic Links*
Who sees it	Company administrators. Without company administrator access the **WhatsApp consents** button is not shown, and inside Cogneris the page shows *This page cannot be opened*.
Content status	Observed (2026-10-18, by a company administrator, including an import that fills `collectedWhen`, and by a profile without administrator access). Field details checked against the Portal interface source (`c6b27f7`) on 2026-10-22; not observed.

Fields

Field	What it does	Required	Format / values	Def
Search by number, proof or who recorded it	Shows consents whose number, proof or **Recorded by** contains the text, ignoring case	No	Free text	Emp
Status	Shows one status	No	**All**, **Granted**, **Revoked** (which includes **Opted out**)	**All**
Import CSV file	Records many consents at once	—	A `.csv` file. The screen reminds: *CSV columns: phone,source,evidenceText[,collectedWhen]. Numbers in E.164, e.g. +12025550123.* An	—

Field	What it does	Required	Format / values	Def
			optional first line starting with `phone,` is skipped. See the rules below.	

CSV rules. The whole file is checked before anything is recorded; the first error stops the import and nothing is sent.

Column	Required	Accepted values
`phone`	Yes	E.164: `+` and 8 to 15 digits, for example `+12025550123`
`source`	Yes	`web_form`, `contract`, `in_person` or `import`
`evidenceText`	Yes	Where the proof is, as free text
`collectedWhen`	No	A date such as `2026-10-17`, or a date and time. It becomes the **Consent date**; without it, the consent date is the import date.

Columns

Column	Content
Number	Phone number
Status	**Granted**; **Revoked**; or **Opted out** — the recipient asked to stop, which blocks the number and cannot be undone by the company
How was it collected?	**Web form**, **Contract**, **In person**, **Import**
Consent date, **Recorded by**	As recorded; **—** when empty

Column	Content
Where is the proof?	As recorded, shortened on screen

Buttons and actions

Button	Shown when	What happens	Reversible?
Import CSV	Always	Checks the file, then records each row in order, showing *Importing …/…*, and ends with *… consents imported.*	Each consent can be revoked
Revoke → **Confirm**	The consent is **Granted**	**Revoke consent**: *Stop sending WhatsApp messages to …?* — the number no longer receives WhatsApp messages from your company; then *Consent revoked.*	Not from this screen

An **Opted out** row shows *The recipient asked to stop — support only.* instead of **Revoke**.

Common problems

Message	Cause	What to do
CSV line …: phone, source and evidence are all required.	A row misses one of the three columns	Fill in the row. The line number is the line in the file, counting the header and blank lines.
CSV line …: "…" is not an E.164 number (e.g. +12025550123).	The number lacks `+` and the country code, or has the wrong length	Write it as `+` country code and number, digits only
CSV line …: unknown source "…". Use one of web_form,	`source` is not one of the four values	Use one of them, in lower case

Message	Cause	What to do
contract, in_person, import.		
CSV line …: "…" is not a date.	`collectedWhen` cannot be read as a date	Use `YYYY-MM-DD`
That file has no rows.	The file is empty or has only the header	Add the rows
The file could not be read.	The file could not be opened as text	Save it again as CSV and import it
… imported, … failed.	Some rows were refused — for example a number that opted out	The screen does not say which; compare the file with the list
No consents recorded yet.	Nothing recorded — or nothing matches the search or status, which shows the same message	Clear the search and set **Status** to **All**
Could not load the consents., *Could not revoke the consent.*	The service failed	Try again

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 *Only tenant administrators can change journey languages and texts. You can review the settings here.*
Content status	Observed (2026-10-18, by a company administrator, who published, and by a profile without administrator access, who saw it read-only)

The procedure, every field, the actions and every message are in the administrator manual: Portal journey languages.

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**, or **Request support about this process** on the link details
Who sees it	Everyone with access to Portal, where support requests are reachable; otherwise the menu item is not shown. 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. Field details checked against the Portal interface source (`01e16b4`) on 2026-10-22; not observed.

Statuses: **Open**, **In progress**, **Waiting for your reply**, **Resolved**, **Closed** (**Unknown status** for anything else). Dates are shown as — when missing.

My support requests

Ask the company for help and follow the replies. One row per request, in the order the service returns: its number, status, subject, category when there is one, and *Updated …*. 20 requests are loaded at a time; **Load more** loads the next ones.

Button	What happens
New request	Opens **New support request**. Hidden when support requests are not available.
A request	Opens it
Load more	Loads the next 20; reads *Loading your requests…* meanwhile
Retry	Loads the list again after an error

Message	Cause
You have not opened any requests yet. — When you need help, open a request and follow the replies here.	No requests
Support requests are not available for your organization yet.	Support requests are not turned on for your company

New support request

Describe what you need. The company's support team will reply here. Text only: files cannot be attached. The page reads *Loading the form…* while it opens.

Field	What it does	Required	Format	Validation messages
Subject	The title of the request	Yes	Up to 200 characters	*This field is required.*; *Use at most … characters.*

Field	What it does	Required	Format	Validation messages
Category	Routes the request. Shown only when the company set up categories; *(optional)* unless the company requires it.	When the company requires it	*Select a category*, then one of the company's categories	*Select a category.*; *Select a valid category.* from the service
Process reference *(optional)*	*Number of the process this request is about. Leave it empty if the request is not about a specific process.* Filled in when you come from **Request support about this process**.	No	Digits only, no leading zero, up to 16 digits	*Enter the process number using digits only.*; *This process was not found or cannot be attached to your request. Check the number or leave the field empty.*
Description	What you need. *Do not include passwords or document numbers.*	Yes	Up to 4000 characters	*This field is required.*; *Use at most … characters.*

The messages appear after the first **Send request** and update as you type; the cursor moves to the first field to fix.

Button	What happens	Reversible?
Send request	Sends the request (reads **Sending…**) and opens it with *Your request was sent. Replies from the support team will appear here.* Sending again after an error does not create a second request.	No

Button	What happens	Reversible?
Cancel	Returns to the list without saving	—

Support request

The page reads *Loading the request…* while it opens, then shows *Request …*, with **Status**, **Process** (a link to the access link, when one was attached), **Category**, **Opened** and **Last update**. The **Conversation** starts with your description, under **You**, followed by the replies, under **Support team** or **You**, oldest first; *No replies yet.* until the support team answers. **Show earlier messages** loads older ones.

Field	Required	Format	Validation messages
Your reply	Yes	Up to 8000 characters	*This field is required.*; *Use at most … characters.*

Button	Shown when	What happens
Send reply	The request is not **Closed**	Sends the reply (*Reply sent.*). Replying to a **Resolved** request reopens it: *This request was marked as resolved. Sending a reply reopens it.*
New request	The request is **Closed**	Opens **New support request**. A closed request shows *This request is closed and cannot receive new replies. Open a new request if you still need help.*
Back to my requests	Always	Returns to the list

Common problems

Message	Cause	What to do
New requests are not available for your	Your company paused new requests	Follow your existing requests, or contact your company

Message	Cause	What to do
organization right now. You can still follow your existing requests.		another way
Your profile is missing a name or e-mail address. Update your profile and try again.	The support team could not know who you are	Complete your profile, then send again
This request was already sent with different content. Reload the page and try again.	The service already holds a different version of this request	Reload the page and send again. Editing after a failed send no longer causes it: the edited request is sent as a new one.
Support requests need a category, but none has been set up yet. Ask your administrator to add one.	Your company requires a category but set up none; **Send request** stays disabled	Ask your company administrator
We could not check the process right now, so your request was not sent. Try again in a moment.	The process reference could not be checked	Try again, or leave **Process reference** empty
This request is closed. Open a new request if you still need help.	The request was closed	Open a new request
This request was not found.	The request does not exist or is not yours	Go **Back to my requests**
Check the fields and try again.	The service refused a field	Check subject, description and reply

Message	Cause	What to do
Too many attempts. Wait a moment and try again.	Too many requests in a short time	Wait, then try again
Support is temporarily unavailable. Try again in a moment.	The support service did not answer	Try again later
Something went wrong. Try again.	Any other failure	Try again; if it persists, contact your company another way

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). Field details checked against the Portal interface source (`c6b27f7`) on 2026-10-22; not observed.

Area	Content
Header	**Document Portal**, **Submit Documents**, the status (**Protected link**, **Correction needed**, **Documents Received!**, or the error)
Progress	*Verifying link…*, **Fill Form** (when the link has a form), **Submit Documents**, **Documents Received!**

Area	Content
Security	**Protected link** — *The link is validated before access.*; **No account required** — *You can complete this request from this secure public session.*; **Limited access** — *Access is restricted to this document request.*
Context	**Expires at**, **Process ID:**
Journey language	Shown when more than one language is enabled. The choice is remembered on the device.
Form step	*Please fill in the form below before submitting your documents.*, *This link expires on …*, the form, **Submit**
Documents step	*You received an invitation to submit documents for the process:* followed by the name of the link's form (*Submit Documents* when the link has no named form); *How it works? — You received a secure link to submit your documents.*, *Use the camera to photograph or upload your documents.*, *Your documents will be sent securely.* — (or the **Correction needed** notice), **Submit Documents** with *For the best experience, use the camera to capture your documents.*, one card per document, then **Confirm** (or **Resend document** in a correction round)
Footer	**Process ID:** and *If you have questions, please contact whoever sent you this link.*

The recipient can leave and come back while the link is valid: answers typed in the form are saved as a draft, documents already sent stay, and the page reopens at the step where the recipient stopped.

Fields

Field	What it does	Required	Format / values
The form's fields	Defined by your company in the form editor	As set in the form	As set in the form, with the form's own messages

Field	What it does	Required	Format / values
A document card	One per document the form asks for, with its title and description	Unless the document is optional	A photo from **Open Document Camera**, or a picture or PDF from **Upload File**. A selfie can only be taken with the camera.

Buttons and actions

Button	Shown when	What happens	Reversible?
Submit	Form step, when the form has no submit button of its own	Checks the form, then shows the documents to send	No — the form does not reopen
Open Document Camera	The document is not in yet	Opens the camera in the page (**Capture your documents**); for a selfie, the selfie check	—
Upload File	The document is not in yet, and it is not a selfie	Sends a picture or PDF from the device	Yes, with **Delete**
Retake	The document is in	Opens the camera again for that document	—
Delete	The document is in	Removes the file; the card can be filled again	—
Confirm / **Resend document**	Enabled once every required document is in and none has a low-quality image	Shows *Submitting…*, sends everything to your company and shows **Documents Received!** — *Your documents have been submitted successfully. You will receive a confirmation shortly.*	No

Button	Shown when	What happens	Reversible?
Try again	*Unable to Verify Link*	Checks the link again	—

After each capture or upload the page shows *Analysing document quality…*. If the image is poor:

- **Image quality is low** — *The quality of the image is low. Please try again in a lighter place and hold the camera still during the capture.* **OK** reopens the camera. A low-quality image keeps **Confirm** disabled until it is replaced or deleted.
- **Image quality not ideal** — *The quality of the capture doesn't seem to be ok. Would you like to retry again?* **Yes** reopens the camera; **No** keeps the image.

Selfies are not checked for quality.

Correction round

When a reviewer at your company returns documents, the page opens at the documents step with **Correction needed**: *We reviewed your documents. Only the item(s) below need to be resent — everything else is already approved.* Each returned document shows **Resend** and, when the reviewer wrote one, **Reason:** with the reviewer's text. Every other document cannot be changed: it shows **Already approved** once the reviewer approved it, or **Awaiting review** while it has no verdict yet. **Resend document** sends the corrections.

Common problems

Message	Cause	What the recipient can do
Link Expired — *This request has passed its expiration date and can no longer receive documents.*	The deadline passed	Ask the sender for a new link (*Please contact whoever sent you this link to request new access.*)
Link Cancelled — *This access link was cancelled by the sender and is no longer available.*	The sender revoked the link	Ask the sender for a new link (*This access link has been cancelled. Please contact the sender.*)

Message	Cause	What the recipient can do
Access Limit Reached — *This secure link has reached the maximum number of allowed accesses.*	**Max. Accesses** or **Single use** was reached	Ask the sender for a new link
Link Not Found — *We could not validate this access link. It may be incomplete, expired from your browser session, or no longer available.*	The link is incomplete — often cut when copied — or no longer available	Open the full link from the original message
Unable to Verify Link — *Your browser could not reach the verification service. Check your connection and try again.*	No connection	Check the connection and select **Try again**
Unable to Verify Link — *The portal could not verify this link right now. Please try again in a moment.*	The service could not answer	Wait a moment and select **Try again**
Could not submit the form. Your answers are still here. Please try again.	The form could not be sent	Select **Submit** again
Document capture failed. Please try again.	The photo or file could not be sent	Capture or upload it again
The document could not be removed. Please try again.	**Delete** was refused; the file is still there	Select **Delete** again
Could not finalize your submission. Please try again.	The documents could not be sent	Select **Confirm** again

Message	Cause	What the recipient can do
Loading form… does not go away	The form could not be loaded	Reload the page; if it persists, contact the sender
Confirm stays disabled	A required document is missing, or an image is low quality	Fill in every card; replace images marked as low quality

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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:

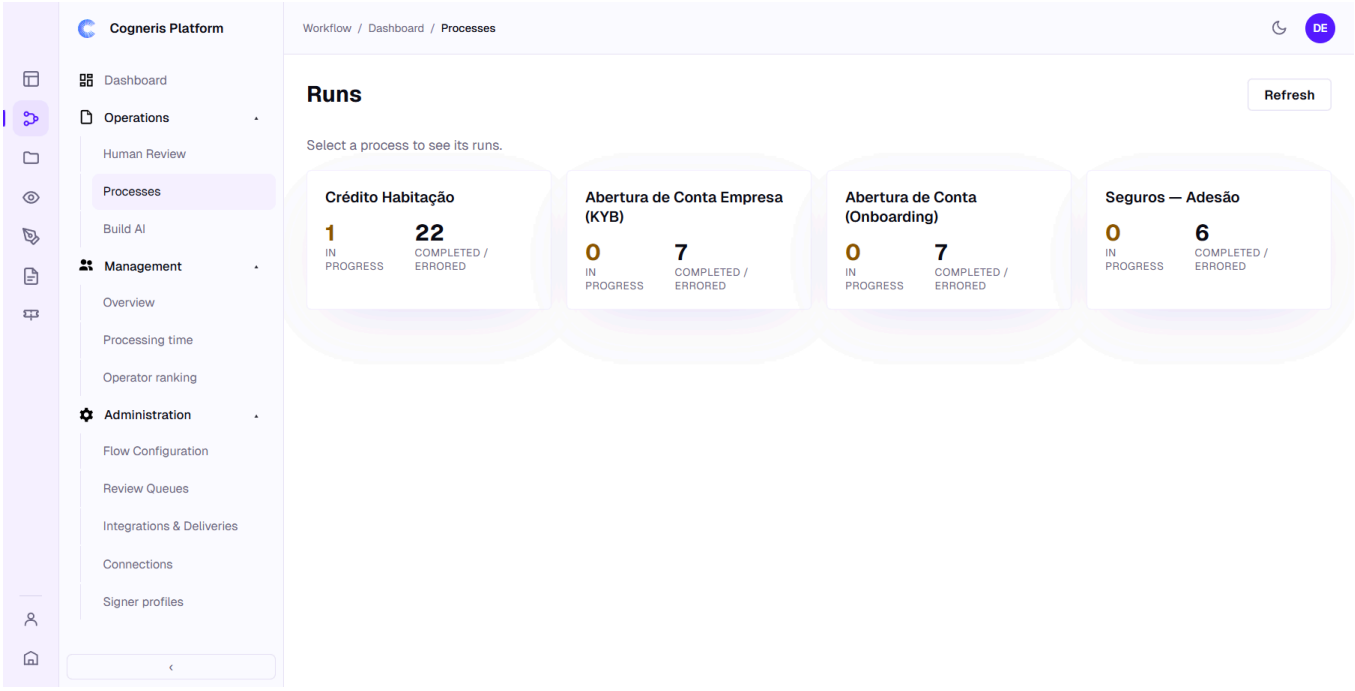
- **From the Portal**, when a person you invited through an access link submits their documents. These processes have a **requester**: if a reviewer rejects a document, the process is returned to that person for correction.
- **Started inside Workflow**, by a user who uploads the documents directly. 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	Review a document
See processes returned to the requester	Same as above	Return a document for correction

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.

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 attempts** keeps showing *Loading…*	The history did not load	Reload the page. This was observed once and did not repeat after reloading.
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** (✗), 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: *This process did not come from the Portal…*	The process was started inside Workflow and has no requester.	Decide every document. If at least one is rejected, the process ends as failed (*Error: manual_review_rejected* on the **Runs** page) and the list of rejected documents is e-mailed to the **Recipient email** of the workflow's first *Send* 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: *Reject at least one document before returning the process to the requester.*	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: *This review is not open for your decision (finished, or in review by someone else).*	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
Could not return the process to the requester. or another error after **Confirm return** — the service's reason may be in Portuguese: *Documento em avaliação por …* (another reviewer holds the review) or *Avaliação em massa indisponível para avaliadores atribuídos a filas específicas…* (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 *System* 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.

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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:

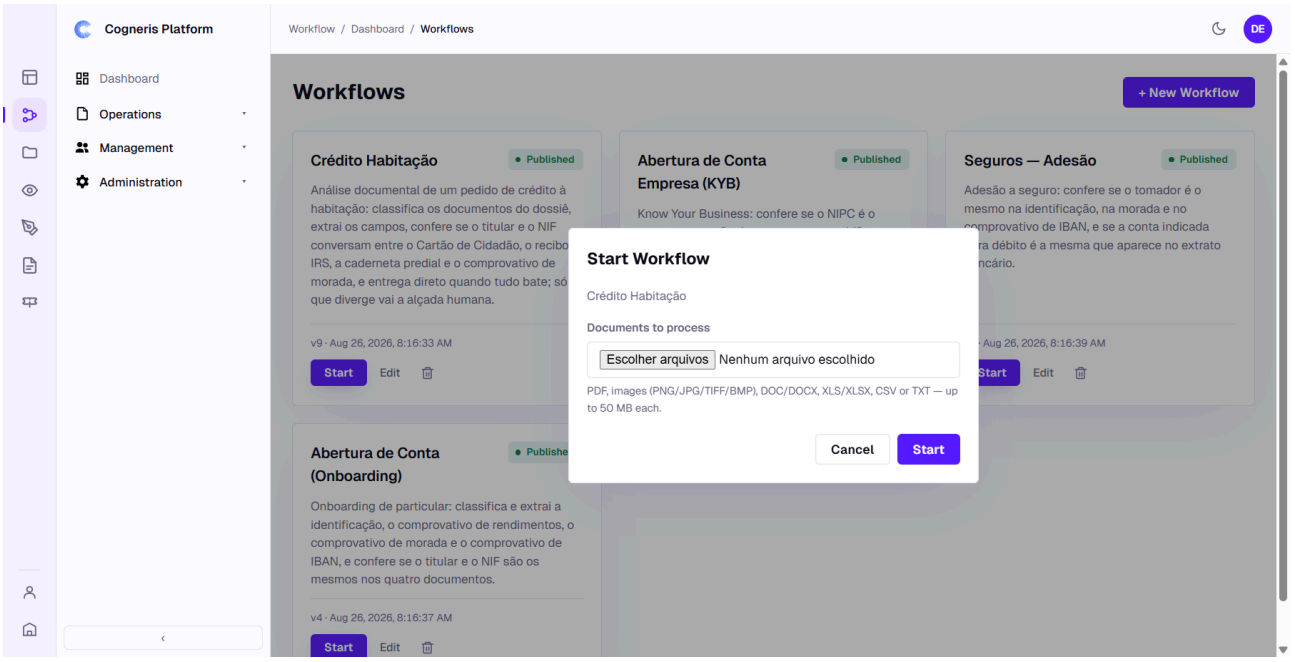
Place	What it shows	Who can open it
Operations › **Human Review** › **Awaiting requester correction**, and each **dossier**	Processes returned to the requester, and the full history of a review	Reviewers allocated to the queue
Operations › **Processes** (the **Runs** page)	Every run of every workflow, 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.**

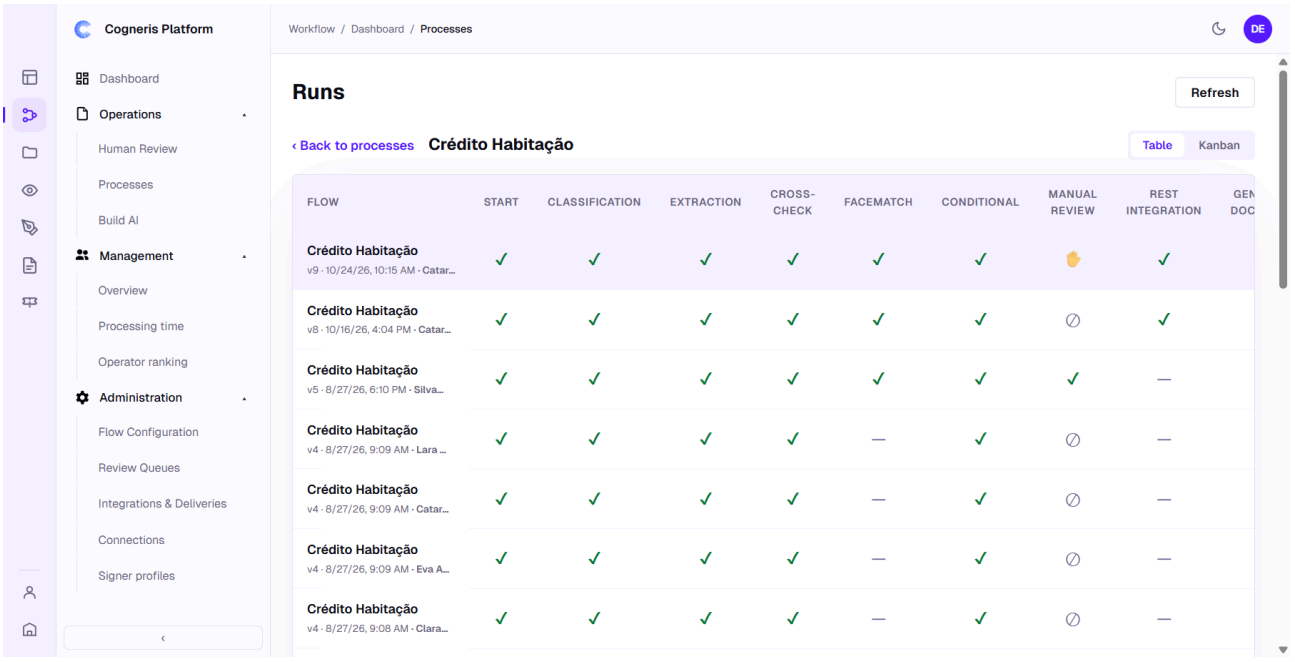
A process started this way has **no requester**: if its review is rejected, it cannot be returned for correction.

Steps

Follow a process on the Runs page

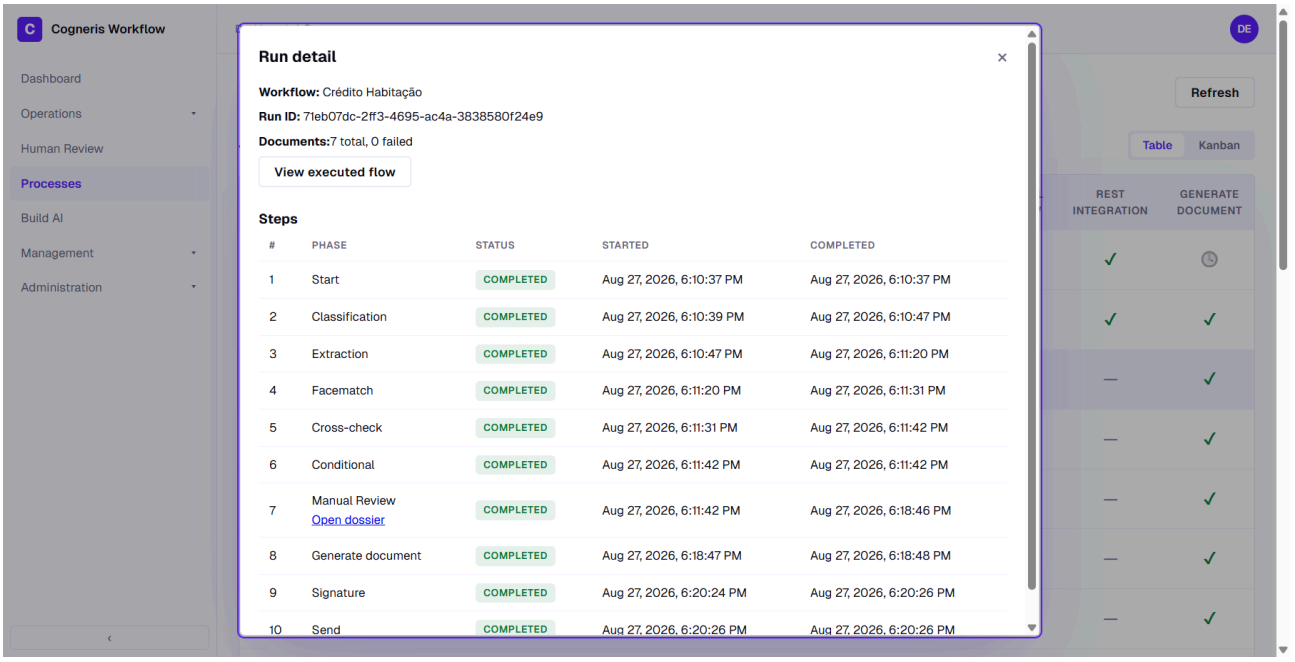
1. In the menu, open **Operations** and select **Processes**. The **Runs** page shows one card per workflow with the number of runs **In progress** and **Completed / errored**.

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 one of a run's phase markers 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.

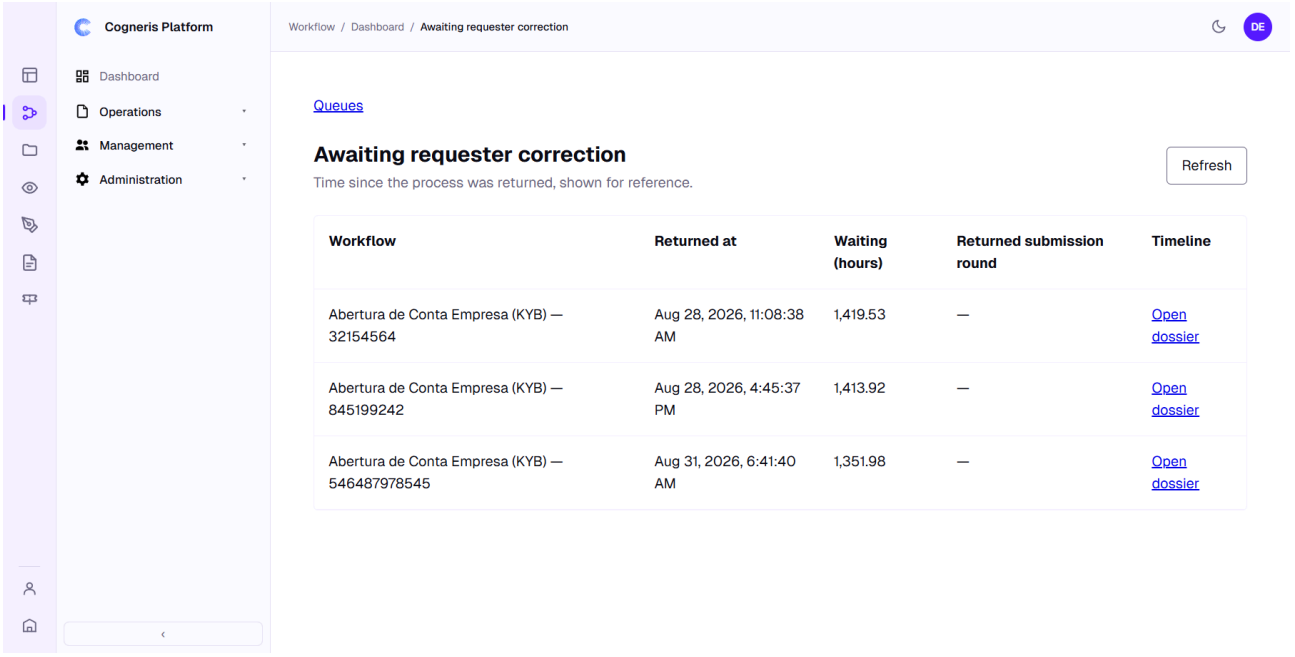


5. Select **Refresh** to update the page.

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 *Awaiting approval*; 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 *Error: returned_to_requester*
Review rejected, no requester	**Runs**: ✗; **Run detail** shows *Error: manual_review_rejected* and the review step as *Failed*
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 *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.* 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.
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`. On 2026-10-22 the field details of every section — and the new Runs kanban and Run detail sections — were checked against the Workflow interface source (`f88c5c1`) and service source (`6703373`); those details were not observed. 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 a review phase is set up is in the administrator manual, Manual Review.

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. Field details checked against the Workflow interface source (`f88c5c1`) and service source (`6703373`) on 2026-10-22; not 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.

Which cards appear:

Card	When it is shown
All	Only to a reviewer who is not limited to specific queues; counts every document waiting
One card per queue	Every queue you work, with its count — also when it is 0
Fraud review	Only while documents flagged as possible forgeries are waiting
Face conference	Only while face checks are waiting
Unidentified	Only while documents of unknown type are waiting

Selecting a card opens that queue and its first document. The queue is kept in the page address, so a copied address opens the same queue. Documents are served oldest process first and, inside a process, in document order. A **Review** button on the Runs kanban opens the queue on that run's first undecided document; if it has none left, the next document of any queue opens instead.

Document view. The header shows the document name, **Open dossier**, the position in the process (for example `1 / 1`) and, for a resubmitted process, **Correction round**: followed by the round number. **Approve** and **Reject** sit above the evidence, followed by **Return to requester**. The evidence below depends on the document — see Review panels.

Fields

Field	What it does	Required	Format / values	Default	Validation messages
Describe what is missing or wrong…	Reason for rejection, shown after **Reject**	Yes	Free text	Empty	None; **Confirm reject** stays disabled until it is filled in. The service

Field	What it does	Required	Format / values	Default	Validation messages
					answers *Enter a note explaining the rejection.* if it arrives empty.
Block this process … (CPF or CNPJ)	Also adds the process's tax number to the blocklist. *Future matches are measured in shadow mode before enforcement.*	No. Shown only when blocklist registration is enabled in this environment and the process carries a valid CPF or CNPJ.	Box	Not ticked	—
Block reason	Why the number is blocked. Shown once the box above is ticked.	Yes, with the box ticked	*Select a reason*, **Document fraud**, **Identity reuse**, **Confirmed recidivism**	*Select a reason*	**Confirm reject** stays disabled until chosen; *The blocklist entry is invalid. Check the reason and the expiry date.*

Field	What it does	Required	Format / values	Default	Validation messages
Valid until	Last day the block applies (until the end of that day, UTC)	Yes, with the box ticked	Date, tomorrow or later	Empty	**Confirm reject** stays disabled until a date from tomorrow on is set
Extracted fields (one box per field)	Corrects the value read from the document. The box is labelled with the field name and the reading confidence, for example `92%`; a confidence below 80% is highlighted.	No	Free text. Dates show as `dd/MM/yyyy HH:mm` and are saved back in the format they arrived in. Values that are lists or groups of values are not shown.	The extracted value	*The edited fields are not valid JSON.* (from the service). Corrections are sent with **Approve**; there is no separate save.
label (one per crop)	Names a crop drawn on the document. Shown when the workflow has a Crops phase.	No	Free text	The detected label	—

Buttons and actions

Button	What happens	Who can use it	Reversible?
Approve (✓)	Approves the document, with any corrections to its fields or crops, and opens the next document of the queue	The reviewer holding the review	No
Reject (✗)	Opens the reason box	The reviewer holding the review	—
Confirm reject	Rejects the document with the reason (and adds the blocklist entry, if ticked), then opens the next document. Disabled until the reason — and, with the blocklist box ticked, the reason and date — are filled in.	The reviewer holding the review	No
Open dossier	Opens the review dossier	Every reviewer who sees the document	—
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	The reviewer holding the review; refused by the service to a reviewer limited to specific queues	—
Confirm return	Closes the review, approves the undecided documents by omission and returns the process to the requester	Same as above	No

Button	What happens	Who can use it	Reversible?
Cancel (return confirmation)	Closes the confirmation without changing anything; Esc does the same	Everyone	Yes
Zoom in, **Zoom out**, **Rotate**, **Reset view**	Change the preview only (toolbar above the preview, with the zoom level, for example `100%`). Zoom goes from 40% to 500%. With the preview selected, the keys + and – zoom, 0 resets, R rotates and the arrow keys move the document.	Everyone	Yes
Previous page, **Next page**	Turn the pages of a PDF of more than one page (`1 / 3`)	Everyone	Yes
Classify document	Shown for a document of unknown type: *This document could not be identified. Pick its type to send it on for field review.*, with one button per document type and **Selfie**. The document moves to that type's queue; it is not decided.	The reviewer holding the review	No
Save (crops)	Keeps the crops as drawn, so that **Approve** sends them. Drag on an empty area to draw a crop, drag a crop to move it, use its handles to resize it, or select × to remove it.	The reviewer holding the review	Until **Approve**
Open certificate (PDF)	Opens the certificate of an external consultation in a new tab	Everyone who sees the document	—

Button	What happens	Who can use it	Reversible?
Show all answers, **Show fewer answers**	Show or hide the rest of the customer's answers in a VIES check	Everyone	Yes

States

State	How it looks
Document open	Name, position counter (`1 / 1`), preview and decision buttons
Loading	*Loading the next document…*
Queue empty	**No documents to review right now.**
Reason missing	**Confirm reject** stays disabled; no message is shown
Return available	**Return to requester** enabled
Return confirmation	*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**
Return unavailable	**Return to requester** disabled, with one of: *This process did not come from the Portal, so there is no requester to return it to. Use Reject.* · *Reject at least one document before returning the process to the requester.* (observed) · *Every document is already decided; the process is closed automatically.* · *This review is not open for your decision (finished, or in review by someone else).* — shown when the review no longer waits for a decision
Return failed	*Could not return the process to the requester.* or the reason in your language — for example when another reviewer holds the review

State	How it looks
	(*Another reviewer is handling this review. Wait until it is released or the lock expires.*) or your access is limited to specific queues (*Reviewers assigned to specific queues cannot decide the whole process at once. Review each document individually.*); the button is enabled in both cases
Return done	*Process returned to the requester. N pending document(s) were approved by omission.*., or *Process returned to the requester.* when none were
Too many requests	*Too many requests. Wait a few seconds and try again.* with the seconds left; the decision buttons are disabled meanwhile

Review panels

The evidence under the decision buttons depends on the document:

Document	Panel	What it shows
Flagged as a possible forgery, or opened from **Fraud review**	**Fraud review**	The document, the level (**Trusted**, **Needs review** or **Suspect**) and *This document was flagged as a possible forgery. You are judging whether it is genuine — not whether its values were read correctly.* Then **Risk level**, **Risk score**, **AI-generated likelihood** (a percentage) and *The score adds up every finding below, weighted by severity; the level is the band it falls in.*; **What was evaluated** — each check (**Content consistency**, **Image forensics**, **PDF structure**, **Provenance (C2PA)**, **Duplicate and reuse**, **Submission history**, **Prompt injection**, **PDF signatures**) with **Passed**, **Flagged** or **Did not run** and what it examines; **Degraded coverage:** and the checks that did not run; **What the checks found** — each finding with its severity (**Informational**, **Low**, **Medium**, **High**), what it means and its **Evidence**. A check or finding the screen does not know yet is shown by its code.

Document	Panel	What it shows
A selfie, or opened from **Face conference**	**Face check**	*Approve if the person in the selfie is the person on the document. Reject — with a reason — if they are not.* One row per compared document: **Selfie**, the verdict (**Same person**, **Different person**, **Inconclusive**, **Not applicable** or **Not checked**) with its score and reason, and the document. Rows with **Different person** come first. See Facematch.
A VIES check	VIES panel	**Confirmed**, **Not confirmed** or **No answer** with the number checked, and *VIES lists only businesses registered for intra-EU trade. A company that trades only inside its own country is not listed, and that absence is not a failure.* Then **What the registry returned** (**Registered name**, **Registered address**), **What the customer declared** (**VAT number**, flagged *Does not match the number checked* when it differs, and the other answers) and **Proof of the check** (**Request date**, **Request number**, or *Not returned*). See KYB.
Another external consultation	Consultation panel	Per consultation: its name, **Answered**, **Not found** or **Failed**, the date, and a **Field** / **Value** table (— when a value is absent) with *Values are partially hidden to protect personal data.*; **Open certificate (PDF)** or *No certificate was issued for this consultation.*
Of unknown type	**Classify document**	The document, the hint and one button per document type

Document	Panel	What it shows
Any other document	Fields panel	The document beside **Document Type** and the extracted fields; *Document Processed Successfully* when no field was extracted. With a Crops phase, the crop editor (*Click and drag on an empty area to create a new crop. Drag a crop to move it, use the handles to resize it, or click x to remove it.*); with a Split phase, the parts found, each with its type (or *Document* and a number) and its pages.

Common problems

Message	Cause	What to do
Failed to load pending reviews., or a technical message	The queues or the next document could not be loaded, or the queue in the address does not exist	Go back to **Human Review** and pick the queue again; if it persists, contact support
No documents to review right now.	Nothing waits in this queue for you	Pick another queue
Approve failed., *Reject failed.*, *Classification failed.*	The decision failed for a reason the screen cannot word	Try again; if it persists, contact support
This review is no longer available: it was not found or was already processed.	Another reviewer or the system closed it meanwhile	Continue with the next document
This document has already been reviewed.	Someone decided it first	Continue with the next document
Another reviewer is handling this review. Wait until it is released or the lock expires.	Another reviewer has the process open	Wait, or work another document

Message	Cause	What to do
This document belongs to a queue you are not assigned to.	Your access is limited to other queues	Ask an administrator to add you to the queue
Reviewers assigned to specific queues cannot decide the whole process at once. Review each document individually.	**Return to requester** decides the whole process	Decide each document; ask a reviewer with access to all queues to return it
This document is not part of this review., *The document to decide was not specified.*	The document no longer matches the review	Reload the queue
Enter a note explaining the rejection.	The reason arrived empty	Write the reason
Choose a document type.	No type was sent with **Classify document**	Pick a type
The edited fields are not valid JSON.	The corrections could not be read by the service	Undo the last correction and try again
This review has no documents to return. Use Reject.	Nothing in the review can go back to the requester	Use **Reject**
No document was rejected. Reject at least one item before returning the process to the requester.	The return was sent before any rejection	Reject a document first
Could not return the process to the requester.	The return failed for a reason the screen cannot word	Try again; if it persists, contact support

Message	Cause	What to do
The blocklist is unavailable in this environment., *Could not identify who is adding the blocklist entry.*, *The blocklist entry is invalid. Check the reason and the expiry date.*, *Could not register the blocklist entry; the rejection was not applied.*	The blocklist entry was refused; **the document was not rejected**	Fix the reason or date, or untick the box and reject again
Too many requests. Wait a few seconds and try again.	Too many actions in a short time	Wait for the seconds shown
Failed to load document., *Failed to render document.*, *Preview not supported for type ….*	The preview could not be shown	Decide from the extracted data, or reload
No document types available. Add templates first.	No document type exists to classify into	Ask an administrator to create document types
No detailed assessment is available for this document., *This assessment predates the check roster — which checks ran was not recorded.*	The fraud assessment is missing or older than the list of checks	Judge from the document itself
No selfie in this process., *This document never arrived.*	One side of the face comparison is missing	Reject with a reason, if the document is required
No registry check ran for this review., *The registry did not accept the requester's identification, so this check is not a formal proof.*, *The proof was not filed in the Document Center:*	The VIES check did not run, is not a formal proof, or its proof was not stored	Decide from what the customer declared; report a missing proof to support

Message	Cause	What to do
The certificate could not be opened., *The consultation returned no data.*, *No external consultation for this document.*	The consultation has no certificate or data to show	Decide from the rest of the process
No segments detected for this document.	The Split phase found no parts	Decide from the document

Consequences. Opening a document reserves it for you; leaving releases it. A reservation that is not released (for example, a closed browser) lapses on its own after 10 minutes, unless the service is set otherwise. 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; the dossier timeline shows it with *Review event* in place of an author, because the system, not a person, closed it.

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 *Awaiting requester correction*, or from **Run detail**
Who sees it	Reviewers. A reviewer limited to specific queues sees only processes with a document in those queues, and not the earlier attempts.

Content status	Observed. Field details checked against the Workflow interface source (`f88c5c1`) and service source (`6703373`) on 2026-10-22; not observed.

Area	Content
Header	**Review dossier**, the process subject (or the workflow name), review status (for example *Awaiting approval*; also *Completed*, *Failed*, *Running*, *Pending*, *Skipped*, *Superseded*)
Timeline	Every event, oldest first, with date, time and author — *Review event* when the system acted: *Review claimed*, *Claim released*, *Document approved*, *Document rejected*, *Document classified*, *Comment added*, *Approved by omission*, *Returned to requester*, *Review closed*. Under an event: the document it concerns, the comment, rejection note or chosen type, *Mentions:* with the people mentioned, and for *Review closed* its result (*Approved*, *Rejected* or *Returned to requester*). Loaded 50 at a time.
Earlier attempts	*No earlier attempts found.* when there are none. Otherwise, each earlier process of the same requester: subject · start date and time · status, how it was matched (*Same document identifier (strong match)*, *Same email address (may be shared)* or *Match type unknown*) and **Open dossier**. A list with entries was *not observed*.
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
Save comment	Saves the comment; the page shows **Comment saved.**

Fields

Field	What it does	Required	Format / values	Default	Validation messages
Comment	The comment, stored in the timeline	Yes	Plain text, up to 4,000 characters; the box stops accepting text beyond that	Empty	**Save comment** stays disabled while it is empty
Document	What the comment is about	No	**Whole process**, or one document of the process by name	**Whole process**	*Could not save. Your draft is preserved.* when the document is outside your queues
Mentions	One box per person you can mention (*You can mention queue members and previous reviewers.*). A mentioned person is notified by e-mail.	No	E-mail addresses	None ticked	*Could not save. Your draft is preserved.* when the service refuses a mention

Buttons and actions

Button	What happens	Who can use it	Reversible?
Save comment	Saves the comment with its document and mentions, clears the box and reloads the timeline. Works also after the review has closed.	Every reviewer who can open the dossier	No — comments cannot be edited or deleted
Load more / retry	Loads the next events, or retries after a loading error	Everyone	—
Open dossier (earlier attempts)	Opens the dossier of that attempt's latest review	Reviewers with access to all queues	—

Opening the dossier of a review that still waits for a decision reserves it for you, as opening it in the queue does, unless another reviewer holds it; leaving the page releases it.

Common problems

Message	Cause	What to do
Unable to load. Access may be restricted.	The review, its timeline, the people to mention or the earlier attempts could not be loaded — for example the process is outside your queues, or your access is limited to specific queues (earlier attempts)	Check you opened the right process; ask an administrator about your queues
No visible events.	The timeline has no event you can see	—
Could not save. Your draft is preserved.	The service refused or failed to store the comment — for example an empty comment, a mention outside the list, or a document outside your queues	Check the text and mentions and save again; the text is kept

Message	Cause	What to do
History is unavailable in this environment.	Earlier attempts cannot be searched here	—
No earlier attempts found.	The requester has no earlier process	—
This attempt has no review step.	The earlier process never reached a review	—

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; a reviewer with access to all queues sees every returned process
Content status	Observed. Field details checked against the Workflow interface source (`f88c5c1`) and service source (`6703373`) on 2026-10-22; not observed.

Columns

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; — when unknown

Column	Content
Waiting (hours)	Time since then, with up to two decimals; longest wait first
Returned submission round	Correction round, — for the first
Timeline	**Open dossier**, or — when the review cannot be found

The subtitle reads *Time since the process was returned, shown for reference.* Only processes that came from the Portal appear here.

Buttons and actions

Button	What happens	Who can use it	Reversible?
Refresh	Reloads the list	Everyone who sees the screen	—
Queues	Back to the queue cards	Everyone	—
Open dossier	Opens the review dossier of that process	Everyone	—

Common problems

Message	Cause	What to do
No processes awaiting requester correction.	No returned process waits on its requester, or none has a rejected document in your queues	—
Unable to load. Access may be restricted.	The list could not be loaded	Select **Refresh**; if it persists, contact support

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 details checked against the Workflow interface source (`f88c5c1`) and service source (`6703373`) on 2026-10-22; not observed.

The dialog is titled **Start Workflow**, with the workflow name under it. **Start** is shown only on published workflows. See also Start.

Fields

Field	What it does	Required	Format / values	Default	Validation messages
Documents to process	The files the process runs on. Each chosen file is listed with × to remove it; choosing more files adds to the list, and the same file (same name	Yes	PDF, images (PNG/JPG/TIFF/BMP), DOC/DOCX, XLS/XLSX, CSV or TXT — up to 50 MB each. The file picker offers only these types; a file over 50 MB is not added (*… is larger than 50 MB.*), and the content is checked by the service.	None	**Select at least one document**

Field	What it does	Required	Format / values	Default	Validation messages
	and size) is listed once.				

Buttons and actions

Button	What happens	Who can use it	Reversible?
Start	Uploads the documents and starts a run; then the **Runs** page opens. Reads **Starting…** while documents are prepared — about 40 s observed for one page.	Everyone who can open the dialog	No
× (beside a file)	Removes the file from the list	Everyone	Yes
Cancel, or a click outside the dialog	Closes the dialog and clears the list. Not available while starting.	Everyone	Yes

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

Common problems

Message	Cause	What to do
Select at least one document.	**Start** with no file	Choose at least one file
The service's message, for example *File '…' has an unsupported extension…*, or **Could not start the workflow.**	The service refused the start; no process was created	Check the file and try again

Message	Cause	What to do
A message from the service, or a technical message	The service refused a file (type, size or content) or the workflow	Remove the file it names, or check the file type and size, and start again

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). Field details checked against the Workflow interface source (`f88c5c1`) and service source (`6703373`) on 2026-10-22; not observed.

Area	Content
Workflow cards	Under *Select a process to see its runs.*, **In progress** and **Completed / errored** counts per workflow, most recently run first
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 manual review phase has **Review**, a card waiting on someone else (a signer, an external system) shows **Waiting**, a failed card shows its error and **Details**. See Runs kanban.
Run detail	Dialog with **Workflow**, **Run ID**, **Documents** (for example *2 total, 1 failed*), **Error** (for example `returned_to_requester`), **View executed flow**, and **Steps** (phase, status, started, completed), with **Open dossier** for review steps. See Run detail.

Area	Content
Actions	**Refresh**, **Back to processes**, **Table** / **Kanban**, **Try again**, **View executed flow**

The page refreshes itself every 10 seconds while it is on screen.

Columns (Table view)

Column	Content
Flow	The workflow name; under it `v` and the version, the start date and time and, for a process from the Portal, the first five letters of the requester's name (the full name on hover)
One column per phase, named after the phase	The phase's status in the run's latest round: ✔ completed, ⏳ running, 🕓 waiting for processing, ✋ awaiting approval, ✕ failed, ⊘ skipped, — not in this workflow. Hovering shows the phase and its status, for example *Manual Review · Awaiting approval*.

Buttons and actions

Button	What happens	Who can use it	Reversible?
A workflow card	Shows the runs of that workflow	Everyone who sees the screen	—
Refresh	Reloads the runs	Everyone	—
‹ Back to processes	Back to the workflow cards	Everyone	—
Table, **Kanban**	Switch the view; the choice is remembered in this browser	Everyone	Yes
A row	Opens Run detail	Everyone	—

Common problems

Message	Cause	What to do
No runs yet. Workflow runs will appear here.	No workflow has run yet	Start one from the Start Workflow dialog
Failed to load runs., or a technical message	The runs could not be loaded	Select **Refresh**; if it persists, contact support

Runs kanban

The runs of one workflow as a board, one column per phase.

How to get here	**Operations** › **Processes**, a workflow card, then **Kanban**
Who sees it	Administrator and technical profiles
Content status	Observed (as part of *Runs*). Field details checked against the Workflow interface source (`f88c5c1`) on 2026-10-22; not observed.

Columns

Column	Content
One column per phase, in phase order	The runs whose latest round is currently in that phase
Completed	Runs that finished
Failed	Runs that ended in failure, each with its error

Each column shows its count, or *No runs* when empty. A card shows the workflow name, `v` and the version with the start date and time, 📄 the number of documents, ⏱ the time in the current phase and the status icon of that phase (the same icons as the table).

Buttons and actions

Button	What happens	Who can use it	Reversible?
A card	Opens Run detail	Everyone who sees the screen	—
Review	Shown when the current phase is a manual review waiting for a reviewer (✋). A run waiting in any other phase shows **Waiting** (🕓) and no **Review**. Opens the review queue on that run's first undecided document; if it has none left, on the next document of any queue.	Reviewers	—
Details	Shown on failed runs. Opens Run detail.	Everyone	—

Run detail

One run: its documents, its error and every phase it went through.

How to get here	A row of the *Runs* table, or a card or **Details** on the Runs kanban
Who sees it	Administrator and technical profiles
Content status	Observed (as part of *Runs*). Field details checked against the Workflow interface source (`f88c5c1`) and service source (`6703373`) on 2026-10-22; not observed.

Area	Content
Workflow, **Run ID**	The workflow name and the run's identifier

Area	Content
Documents	*… total*, *… failed*, or the number of documents
Error	Why the run stopped, as recorded by the service (for example `returned_to_requester`)
Try again	See below
View executed flow	Opens the *Executed flow* panel
Steps	One row per phase: **#**, **Phase**, **Status** (*Running*, *Pending*, *Completed*, *Awaiting approval*, *Failed*, *Skipped*, *Superseded*), **Started**, **Completed** (— when not yet). A corrected run lists each round under **Original submission** and **Correction …**.

Phase detail. Selecting a phase name opens a panel with what the phase decided: its name, **Outcome** (for example *Pass*, *Review*, *Match*, *Approved*, *Rejected*), its status, its counts (for example *2 approved*), **Started**, **Duration**, **Retries**, its error, and when they apply *Values are masked to protect personal data. Only the first and last characters are shown.*, *A condition was evaluated against a field that could not be resolved, so it counted as not met.* and *Zero-shot replaced a document type that classification had already resolved.* Then a table of decisions (**Checked**, **Result**, **Expected**, **Found**) and a table of documents (**Document** and one column per value — **Type**, **Confidence**, **Template**, **Reviewer**, **Decided at**, **Note**… — a value the screen does not know is named as the service stores it). A signature validation phase shows its report. The phase stays open in the page address.

Executed flow. View executed flow opens the *Executed flow* panel: **Flow**, **Version** (`v` and the number, marked *superseded* when a newer version exists), **Published by**, **Published**, **Content hash** (the first 12 characters; the full hash on hover) and the phases, in order, that the run executed.

Buttons and actions

Button	What happens	Who can use it	Reversible?
Try again	Shown for the one phase that stopped the run's latest round: a failed phase, or a phase other than **Manual Review** that is parked waiting. Its tooltip reads *Run the … phase again*; it reads **Restarting…** while sent. The phase is queued to run again shortly, the run and the list are reloaded, and *The phase will run again shortly.* (or *This phase was already running again.*) is shown. 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.	Everyone who sees the screen; the service decides	No
View executed flow	Opens the *Executed flow* panel (from the product; what it opens was *not observed*)	Everyone	—
A phase name	Opens its phase detail	Everyone	—
Open dossier	Shown on **Manual Review** rows. Opens the review dossier.	Reviewers	—
× (**Close**) on a panel	Closes that panel	Everyone	Yes
Esc	Closes the open panel first, then the dialog	Everyone	Yes
× (**Close**) on the dialog, or a	Closes the dialog	Everyone	Yes

Button	What happens	Who can use it	Reversible?
click outside it			

Common problems

Message	Cause	What to do
Failed to load run detail., or a technical message	The run could not be loaded	Close and open the run again
This workflow has no defined phases.	The run has no phases	—
Could not restart this phase., or a technical message	The service refused the retry — for example the phase is no longer stopped, or a reviewer's rejection is not undone by running the review again	Select **Refresh** to see the current state
Could not load this phase.	The phase detail could not be loaded	Select the phase again
This phase does not report decisions yet.	The phase records no decisions	—
The flow this run executed cannot be shown as it was.	The version the run used cannot be shown. With *This run started before the workflow began retaining its published versions, so the flow it used was not kept.* the run is older than version keeping; with *The published version this run used could not be read. Nothing removes a published version, so*	Report the second case to support

Message	Cause	What to do
	this is unexpected — please report it. the version could not be read	
The executed flow could not be loaded. Try again in a moment.	The panel could not be loaded	Close it and select **View executed flow** again

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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 profile	Send a document for signature
Follow envelopes and cases, send a reminder	Same as above	Follow up an envelope
Sign or decline a document you received	Only the signing link and access to the e-mail address it was sent to	Sign or decline a document

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. The envelope shows as **Refused**, and only the person who created it sees the reason, on the envelope page — see Sign screens.

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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** (required) — choose the file to sign. A PNG or JPG is turned into a one-page PDF when it is attached, so the signer sees it on the signing page like any PDF.
    - **Signer e-mail** (required) 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.

    The document and the signer are required because the envelope page has no way to add them later, and an envelope without them 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
Only PDF, PNG and JPG files can be signed.	The file type is not accepted	Convert the document to PDF and choose it again.
The document exceeds the 50 MB limit.	The file is too large	Reduce the file size, for example by splitting the document.

What you see	What it means	What to do
Enter a valid e-mail address.	The signer e-mail is malformed	Correct the address.
The envelope was created but the document could not be uploaded. Try again.	The draft exists; only the upload failed	Select **Create envelope** again: the same draft is reused, no second envelope is created.
The envelope was created but the signer could not be added. Try again.	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 (in Brazilian Portuguese) 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
Invalid or expired link.	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.
Invalid code.	The code is wrong or expired, or too many wrong codes were tried (5 attempts per code)	Select **Send a new code** to receive a new code.
No code arrives after **Send verification code**	The code could not be delivered	Check your spam folder, then select **Send a new code**; if it still does not arrive, ask the sender to check your e-mail address.
We couldn't send the verification code.	The service could not send the code	Select **Send verification code** again; if it persists, contact the sender.

What you see	What it means	What to do
This document could not be displayed.	The preview failed	Select **Download the document** to read it in your own viewer.
This document is an image and can't be shown here. Download it to review it.	The document is an image attached before images were converted to PDF	Select **Download the document** to read it.
Your signature could not be recorded. Try again.	The service refused the signature	Select **Sign document** again; if it persists, contact the sender.
Sign document stays disabled	Something is missing	Make sure you applied a signature, placed it on every document, and ticked the consent box.
Your refusal could not be recorded…	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 still has to sign — not those who declined, nor the rest of a request that was declined, cancelled or expired) 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
Reminder delivered to … of … pending signers. Check the addresses of those who did not receive it.	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.
No reminder could be delivered. Check the addresses of the pending signers.	No e-mail was delivered	Same as above.
The reminder could not be sent. The envelope may no longer be in progress.	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 *No cases yet*	No Workflow run has raised a signature request	Envelopes you create yourself are under *See envelopes created by hand* (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.

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

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`). On 2026-10-22 the fields, actions and messages of every screen on this page — the *Dashboard*, the *New envelope* dialog, *Envelopes*, the *Envelope page*, *Cases*, the *Case page* and the *Signing page* — were checked against the Sign interface source (`8a45db4`) and the Sign service (`9f406d1`); those details are marked as not observed in each screen's *Content status*, and *Page not found* was added from source. On 2026-10-23 the page was updated for the corrections of WOR-167 (Sign interface, cogneris-sign-fe#150): the *New envelope* dialog now requires the document and the signer, failures on the *Envelope page* and the *Signing page* now show a message, codes are shown as names, and **Still to sign** no longer lists signers who declined. Those changes are from source; not observed.

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). Field details checked against the Sign interface source (`8a45db4`) on 2026-10-22; not observed.

Area	Content
Counters	**Drafts**, **Out for signature**, **Completed**, **Completed (7d)** — for the whole company. **Completed (7d)** counts envelopes finished in the last seven days and shows `+` before a number above zero. A counter shows **—** while it loads or after an error.
Quick actions	**New envelope** (opens the *New envelope* dialog), **All envelopes** (the *Envelopes* list), **Awaiting signatures** (the list filtered to **Running**)
Error	*We couldn't load your dashboard stats.* with **Try again**

Buttons and actions

Button	What happens	Who can use it	Reversible?
New envelope	Opens the New envelope dialog. After an envelope is created the counters reload.	Everyone who sees the screen; the service accepts the envelope only from a company administrator or the technical team	—
All envelopes	Opens Envelopes	Everyone who sees the screen; the list loads only for a company administrator or the technical team	—
Awaiting signatures	Opens Envelopes showing only **Running** envelopes	As **All envelopes**	—
Try again	Loads the counters again	Everyone who sees the screen	—

The **All envelopes** tile reads *Drafts, in progress and completed — open any envelope to see its signers and documents.*

Common problems

Message	Cause	What to do
We couldn't load your dashboard stats.	The counters could not be loaded	Select **Try again**; if it persists, contact support

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 *Envelopes* page
Content status	Observed (2026-10-17, Brazil, Simple (SES), one PDF and one signer). Field details checked against the Sign interface source (`8a45db4`) and the Sign service (`9f406d1`) on 2026-10-22; not observed.

The form is reset every time the dialog opens, and the cursor starts in **Envelope name**.

Fields

Field	What it does	Required	Format / values	Default	Vali mes
Envelope name	Names the envelope in every list	Yes	Free text; example *MSA with Acme Corp*	Empty	Non **Crea env** stay disal until nam type
Jurisdiction	The law the signature follows	Yes	**Brazil (MP 2.200-2)**, **European Union (eIDAS)**	**Brazil (MP 2.200-2)**	—

Field	What it does	Required	Format / values	Default	Vali mes
Signature level	The signature level	Yes	**Simple (SES)** only	**Simple (SES)**	—
Locale	The envelope's language	Yes	**Portuguese (BR)**, **English (US)**, **Spanish (ES)**	**Portuguese (BR)**	—
Document	The file to sign. Hint: *PDF, PNG or JPG, up to 50 MB.*	Yes	One PDF, PNG or JPG file, up to 50 MB. A PNG or JPG is turned into a one-page PDF (A4, the image fitted to the page) when it is attached, and the envelope keeps that PDF: it is what the signer sees and signs, and what is sealed.	None	*Cho docu to b sign Only PNG JPG can sign The docu exce the limit*
Signer e-mail	Who receives the signing link and the verification code. Hint: *The signing request goes to this address.*	Yes	One e-mail address; example *signer@company.com*	Empty	*Ente sign mail addr Ente valic mail addr*

Field	What it does	Required	Format / values	Default	Vali mes
	You review and send it from the envelope page.				
Signer name (optional)	The signer's name on the envelope and the signing page	No	Free text; example *Ana Paula*	The part of the e-mail before `@`	—

The signer is added with verification by e-mail code, as signer 1. Only one document and one signer can be given here. The dialog sets no expiry date for the envelope.

The document and the signer are required because the Envelope page has no action to add either later, and the service refuses to send an envelope with no document or no signer.

The dialog ends with *After creation you'll be taken to the envelope page to review and send it.*

Buttons and actions

Button	What happens	Who can use it	Reversible?
Create envelope (*Creating…* while it works)	Creates the draft, uploads the document, adds the signer, then opens the envelope page. Disabled until a name is typed. After a partial failure, selecting it again resumes on the same draft instead of creating a second one.	Company administrators and the technical team; the service refuses anyone else	The draft stays; it is never sent until you select **Send**

Button	What happens	Who can use it	Reversible?
Cancel / × / Esc / a click outside the dialog	Closes the dialog. None of them closes it while it works.	Everyone who sees the dialog	Yes

Common problems

Message	Cause	What to do
Only PDF, PNG and JPG files can be signed.	The file is not `.pdf`, `.png`, `.jpg` or `.jpeg`	Choose a PDF, PNG or JPG file
The document exceeds the 50 MB limit.	The file is larger than 50 MB	Reduce the file or split it
Choose the document to be signed.	No document was chosen	Choose the file to sign
Enter the signer's e-mail address.	The signer e-mail is empty	Type the signer's address
Enter a valid e-mail address.	The signer e-mail is not shaped like an address	Correct the address
The envelope was created but the document could not be uploaded. Try again., followed by the service's reason when it gives one	The draft exists; the upload failed	Select **Create envelope** again
The envelope was created but the signer could not be added. Try again., followed by the service's reason when it gives one	The draft and document exist; the signer was refused	Check the address and select **Create envelope** again

Message	Cause	What to do
Couldn't create the envelope. Try again or contact support., followed by the service's reason when it gives one	The draft could not be created	Try again; if it persists, contact support

Envelopes

Every envelope of the company, newest first.

How to get here	Menu **Envelopes**; Dashboard **All envelopes** or **Awaiting signatures**
Who sees it	Company administrators and the technical team; the service refuses the list to anyone else
Content status	Observed (2026-10-17, envelopes **Finished** and **Refused**). Field details checked against the Sign interface source (`8a45db4`) and the Sign service (`9f406d1`) on 2026-10-22; not observed.

Columns

Column	Content
Envelope	Name; links to the envelope page
Signer / **E-mail**	One line per signer, in signing order; *No signers* when there is none. The e-mail opens your mail program; **—** when a signer has no e-mail.
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. Opened from **Awaiting signatures**, it shows only **Running** envelopes, but nothing on the page says the list is filtered; open the menu **Envelopes** to see them all again.

Buttons and actions

Button	What happens	Who can use it	Reversible?
New envelope	Opens the New envelope dialog; the list reloads after an envelope is created	Everyone who sees the screen	—
Envelope name	Opens the Envelope page	Everyone who sees the screen	—
(preview icon)	Opens the envelope preview	Everyone who sees the screen	—
Try again	Loads the list again	Everyone who sees the screen	—

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.

Area	Content
Title	The envelope name and its status
Document tabs	One tab per document, when there is more than one; selecting a tab previews that document
Jurisdiction, **Signature level**, **Language**	The same names as in the *New envelope* dialog — for example **Brazil (MP 2.200-2)**, **Simple (SES)**, **Portuguese (BR)**. A value the interface does not know is shown as stored.
Sent, **Expires**, **Finished**	Date and time; **—** when not set

Area	Content
Signers	Order, name, e-mail, status (**Pending**, **Viewed**, **OTP requested**, **Identity verified**, **Signed**, **Refused**) and the authentication method, for example **E-mail code**
Documents	File name, size and the first 12 characters of the document hash
Sealed document hash	The first 24 characters of the sealed package's hash, once it exists

Close, ×, Esc or a click outside returns to the list.

Common problems

Message	Cause	What to do
No envelopes yet.	The company has no envelope, or none matches **Awaiting signatures**	Create one with **New envelope**
We couldn't load your envelopes.	The list could not be loaded, including when your profile is not allowed to see it	Select **Try again**; if it persists, check your profile with your administrator
We couldn't load this envelope.	The preview could not load the envelope	Select **Try again**
We couldn't load this document.	The preview could not load the document	Select **Try again**
No documents attached.	The envelope has no document	—
This file type can't be previewed.	The document is not a PDF, PNG or JPG	—

Envelope page

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

How to get here	Select an envelope name in *Envelopes*, or **Open envelope** on a case
Who sees it	Company administrators and the technical team
Content status	Observed (2026-10-17, **Send** and the envelope **Finished** or **Refused**; **Send reminder** not walked). Field details checked against the Sign interface source (`8a45db4`) and the Sign service (`9f406d1`) on 2026-10-22; not observed.

Area	Content
Header	Envelope name; *Status: … · jurisdiction · signature level*, with the names of the dialog (for example *Brazil (MP 2.200-2) · Simple (SES)*)
Documents	Order, file name and the first characters of the document hash
Signers	Order, name and signer status
Reason for declining	Only on a **Refused** envelope, and only for the person who created it: the signer's reason, or *The signer did not give a reason.*., with *Only you, as the sender, can see this reason.*

Buttons and actions

Button	Shown when	What happens	Who can use it	Reversible?
Send (*Sending…* while it works) → **Send now**	Status is **Draft**	Asks *Send envelope? — The envelope will be sent to … signer…: …. This cannot be undone.* — then sends the envelope; signing links go out by e-mail	Company administrators and the technical team	No
Send reminder (*Sending reminder…* while it works) → **Send reminder**	Status is **Running** and at least one signer has not answered	Asks *Send a reminder? — The signing link will be sent again to … pending signer(s): ….* — then sends a new signing link to every signer who has not answered	Company administrators and the technical team	No
Cancel / Esc	In either confirmation	Closes it without sending	—	Yes
Copy URL	After sending, in the *Envelope sent* panel	Copies one signer's signing URL; the button then reads **Copied**. If the browser refuses the copy: *Couldn't copy the link. Select it and copy it manually.*	Everyone who sees the panel	—

Button	Shown when	What happens	Who can use it	Reversible?
Dismiss	In the *Envelope sent* panel	Hides the panel	Everyone who sees the panel	The URLs are not shown again

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.* — and only to the user who created the envelope; anyone else sees no reason section at all.

Common problems

Message	Cause	What to do
Envelope sent — share these signing URLs	After **Send now** — not a problem: each signer's URL is listed	Copy a URL if a signer needs it by another channel
… signing link(s) could not be delivered. Copy … and send it to the signer yourself. and **Not delivered**	Sent, but an e-mail failed	Copy the URL marked **Not delivered** and send it yourself
Reminder sent to … signer(s).	Every pending signer was reached	—
Reminder delivered to … of … pending signers. Check the addresses of those who did not receive it.	Some were reached	Check the addresses of the others

Message	Cause	What to do
No reminder could be delivered. Check the addresses of the pending signers.	None was reached	Check the addresses
The reminder could not be sent. The envelope may no longer be in progress.	The service refused the reminder	Reload the page to see the envelope's current status
The envelope could not be sent.., followed by the service's reason	The service refused to send — for example the envelope has no document or no signer (drafts created before the document and signer became required)	Check **Documents** and **Signers**; a draft without them cannot be completed from Sign
We couldn't load this envelope.., followed by the service's reason, with **Try again**	The envelope could not be loaded (for example it does not exist or your profile may not see it)	Select **Try again**, or go back to *Envelopes* and open it again

Cases

Signature requests grouped by the Workflow run that raised them.

How to get here	Menu **Cases**
Who sees it	Company administrators and the technical team
Content status	Observed (2026-10-18, one case **In progress** `0/1`, then **Signed** `1/1`). Field details checked against the Sign interface source (`8a45db4`) and the Sign service (`9f406d1`) on 2026-10-22; not observed.

Columns

Column	Content
Case	Case name (or *Unnamed case*) and reference; links to the case page
Signed	Signed requests out of all requests, e.g. `1/2`; *… not completed* 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*.

How **Status** is decided by the service: **In progress** while any request is still a draft or out for signature; otherwise **Not completed** when any was refused, expired or cancelled; **Signed** when at least one was signed and none failed; **Empty** in any other case. **Last activity** is the date the case's most recent request was created — it does not move when someone signs.

Buttons and actions

Button	What happens	Who can use it	Reversible?
Case name	Opens the Case page	Everyone who sees the screen	—
See envelopes created by hand	Opens Envelopes; shown only when there is no case	Everyone who sees the screen	—
Try again	Loads the list again	Everyone who sees the screen	—

Common problems

Message	Cause	What to do
No cases yet. A case appears here once a workflow raises a signature request.	No workflow has raised a signature request; envelopes created by hand are not cases	Use *See envelopes created by hand*
We couldn't load your cases.	The list could not be loaded, including when your profile is not allowed to see it	Select **Try again**; if it persists, check your profile with your administrator

Case page

How to get here	Select a case in *Cases*
Who sees it	Company administrators and the technical team
Content status	Observed (2026-10-18, **Raised by** *workflow*, a pending signer, then *Everyone has signed.* and *The signed package is available.*). Field details checked against the Sign interface source (`8a45db4`) and the Sign service (`9f406d1`) on 2026-10-22; not observed.

Area	Content
Title	The case name, or its reference when it has no name
Reference	The case reference
Raised by	The system that raised the requests, when known
Still to sign	Every signer of the case who still has to sign, as name and e-mail. A signer who declined is not listed, and neither are the other signers of a request that was declined, cancelled or expired. When nobody is left:

Area	Content
	Everyone has signed., or *Nobody is waiting to sign: a request was declined, cancelled or expired.*
Signature requests	One card per envelope, oldest first: name, *… document(s)*, *sent …* (**—** when not sent), status, signers with their status (or *No signers on this request.*), *The signed package is available.* once sealed, and **Open envelope**

Buttons and actions

Button	What happens	Who can use it	Reversible?
Open envelope	Opens that request's Envelope page	Everyone who sees the screen	—
Try again	Loads the case again	Everyone who sees the screen	—

Common problems

Message	Cause	What to do
Loading this case…	The case is loading	Wait
We couldn't load this case.	The case could not be loaded, or the reference has no signature request	Select **Try again**, or go back to *Cases*

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

Who sees it	The signer who holds the link; no Cogneris account is needed
Content status	Observed (2026-10-17, verification code, **Add signature** with **Type**, consent, **Sign document**; and **Decline to sign** with a reason). Field details checked against the Sign interface source (`8a45db4`) and the Sign service (`9f406d1`) on 2026-10-22; not observed.

The page is titled **Electronic signature** under **Cogneris Sign** and *Signature request*, with *Verify your identity, review the envelope, and complete the signature request.* The link's code is removed from the address once the page opens.

Area	Content
Header	**Electronic signature**, status (*Protected signature flow*, **Signed**, **Declined** or **Unavailable**), and the steps **Open request**, **Verify identity**, **Review and sign**, **Complete**
Context	**Envelope**, **Jurisdiction**, **Signature level**, with names such as **Brazil (MP 2.200-2)** and **Simple (SES)**. Before the code is verified, the envelope name is left blank.
Security notes	**Identity check** (*This signing flow requires OTP verification before signing.*), **Protected link** (*The public token is removed from the visible URL after load.*), **Audit trail** (*Consent and signature data are submitted only when you complete the flow.*)
Before verification	**Send verification code**, then the **6-digit code** box, **Verify** and **Send a new code**. The service sends no envelope name and no file names until the code is verified, so no document is listed — corrected from the earlier text, which said the file names were shown. A signer who already verified and reopens the link sees the file names (selecting one downloads it) and must ask for a new code.
After verification	Document list with **Placed** / **Pending** per document, the document viewer (**Zoom in**, **Zoom out**, **Fit to width**, **Previous page**, **Next page**),

Area	Content
	Add signature, **Change signature**, the consent box, **Decline to sign** and **Sign document**

Fields

Field	What it does	Required	Format / values	Default	Validation messages
6-digit code	The verification code sent by e-mail after **Send verification code**	Yes	Six digits; valid for 10 minutes and 5 wrong attempts	Empty	*Invalid code.*
Document list	Chooses which document the viewer shows; each shows **Placed** or **Pending**. Shown only with more than one document; with one, its name and badge sit above the viewer.	—	The envelope's documents	The first document	—
Document viewer	Shows every page of the document; a click on a page places or moves the signature there. Keys `+`, `-` and `0`	—	Zoom from 50% to 300%, in steps of 25%; 100% is **Fit to width**	Fit to width, page 1	*This document could not be displayed.*, *This document is an image and can't be*

Field	What it does	Required	Format / values	Default	Validation messages
	zoom in, zoom out and fit to width. Shows *Page … of …* under each page. Shows PDF documents only.				*shown here. Download it to review it.*
Consent box	Confirms the signer read the document: *I have read … and understand my electronic signature is legally binding (MP 2.200-2 / eIDAS).*, or with several documents *I have read the … documents in … and understand my electronic signature is legally binding (MP 2.200-2 / eIDAS).*	Yes, to sign	Tick box	Not ticked	**Sign document** stays disabled

A hint above the viewer says what to do next: *Click on the document where you want to sign.* before there is a signature, *Tap the page where your signature should appear.* once there is one, and *Click elsewhere on the page to move your signature, or click it to change it.* once it is placed. With a signature but a document still **Pending**: *Place your signature on every document before signing.*

The placed signature is a box about a third of the page wide, centred where you clicked and kept inside the page. One signature is used for the whole envelope: changing it changes it on every document already placed.

Your signature dialog

Opens when the signer clicks a page without a signature yet, selects **Add signature**, or selects **Change signature** or the placed signature.

Field	What it does	Required	Format / values	Default	Validation messages
Signature method	Chooses how the signature is made	Yes	**Type**, **Draw**	**Type**	—
Full name (**Type**)	The name written in a handwriting style. A preview shows exactly what will be stamped, with *This is how your signature will appear on the document.*	Yes	Free text	The signer's name	**Apply signature** stays disabled while empty
Drawing area (**Draw**)	*Draw your signature below* — draw with the mouse, a finger or a pen	Yes	Free drawing; it is enlarged and centred to fill the signature box	Empty	**Apply signature** stays disabled until something is drawn

Button	What happens	Who can use it	Reversible?
Apply signature	Sets the signature and, if the dialog opened from a click on the page, places it there	The signer	Yes, until **Sign document**
Clear (**Draw**)	Erases the drawing. Disabled until something is drawn.	The signer	—
Cancel / × / Esc / a click outside	Closes the dialog; the spot clicked on the page is dropped	The signer	Yes

Decline to sign dialog

Opens from **Decline to sign**: *Decline to sign? — Declining ends the envelope for every signer and it can no longer be signed. The sender will be notified.*

Field	What it does	Required	Format / values	Default	Validation messages
Reason for declining	Tells the sender why: *Tell the sender why you are declining (up to … characters).*	Yes	Free text, up to 500 characters	Empty	*Enter a reason for declining.*

Buttons and actions

Button	What happens	Who can use it	Reversible?
Send verification code	Sends a six-digit code by e-mail and shows the code box. Disabled while it works.	The signer	—
Verify	Checks the code; when it is right, the documents open. Disabled	The signer	—

Button	What happens	Who can use it	Reversible?
	until a code is typed and while it works.		
Send a new code	Sends a new code without reloading the page	The signer	—
A document name (before verification)	Downloads that document. Shown only to a signer who already verified on an earlier visit.	The signer	—
Zoom in, **Zoom out**, **Fit to width**	Change the zoom	The signer	Yes
Previous page, **Next page**	Move through the document. Shown when it has more than one page.	The signer	—
Add signature	Without pointing at the page: opens *Your signature* when there is no signature, and places it at the bottom right of the last page. Shown while the open document has no placed signature.	The signer	Yes, until **Sign document**
Change signature (or a click on the placed signature)	Opens *Your signature* to replace it. Shown once there is a signature.	The signer	Yes, until **Sign document**
Apply signature (in *Your signature*, **Type** or **Draw**)	Sets the signature and places it where you clicked	The signer	Yes, until **Sign document**
Sign document	Records the signature on every document. Enabled only with a signature placed on every	The signer, after	No

Button	What happens	Who can use it	Reversible?
	document and the consent box ticked; disabled while it works. When this is the last signer, the envelope becomes **Finished**.	verifying the code	
Decline to sign → **Decline to sign** (*Declining…* while it works)	Refuses with a required reason (up to 500 characters); ends the envelope for every signer	The signer, after verifying the code	No
Go back	Closes the decline dialog without declining	The signer	Yes
Download the document	Downloads the document when it could not be shown in the viewer	The signer	—

Common problems

Message	Cause	What to do
Invalid or expired link. (status **Unavailable**)	The link cannot be used: it is wrong, the envelope is no longer out for signature (finished, refused, cancelled or expired), or this signer declined	Ask the sender for a new request
Invalid code.	Wrong, expired (10 minutes) or exhausted (5 attempts) code	Type the code again; if it expired or was exhausted, select **Send a new code**
We couldn't send the verification code., followed by the service's reason	The code could not be delivered, or this signer already signed	Select **Send verification code** again; if it persists, check your e-mail address with the sender. If you

Message	Cause	What to do
		already signed, there is nothing left to do
We couldn't check the code., followed by the service's reason	The service refused the check (for example the envelope stopped being out for signature)	Select **Verify** again or **Send a new code**; if it persists, contact the sender
This document is an image and can't be shown here. Download it to review it.	The document is an image attached before images were converted to PDF	Use *Download the document* to read it; **Add signature** still places the signature
This document could not be displayed.	The PDF could not be fetched or rendered	Use *Download the document*
Place your signature on every document before signing.	A document is still **Pending**	Open each **Pending** document and place the signature
Enter a reason for declining.	**Decline to sign** with an empty reason	Type a reason
Your refusal could not be recorded…	The envelope is no longer waiting for signatures	Reload the page; contact the sender
Your signature could not be recorded. Try again., followed by the service's reason	The service refused the signature — for example a placement outside the page or an envelope too large to seal at once	Select **Sign document** again; if it persists, contact the sender
Signature recorded successfully. (status **Signed**)	After **Sign document** — not a problem	Close the page

Message	Cause	What to do
Signature declined — *Your refusal has been recorded and the sender will be notified. You can close this page now.* (status **Declined**)	After declining — not a problem	Close the page

Page not found

How to get here	Any Sign address that does not exist
Who sees it	Everyone
Content status	From source; not observed (Sign interface `8a45db4`, 2026-10-22)

Shows **404** and *Page not found*.

Button	What happens	Who can use it	Reversible?
Go home	Opens the Dashboard; a signer without a Cogneris account is sent to sign in	Everyone	—

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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.

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

You want to	Profile you need	Where
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. Share links are listed and revoked on the document's page, under **Active share links**.
- **Search documents** and **Browse folders** on the Dashboard open screens that are managed by administrator and technical profiles.

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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 50 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 *No folders yet — create one in Browse first*, ask an administrator to create one.
Upload failed. Try again or contact support. (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.
We couldn't load your dashboard stats. 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.

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

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
Could not open the link.	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.
Preview not supported for this file type.	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`). On 2026-10-22 the fields, actions and messages of the *Dashboard*, the *Upload document* dialog and the *Shared document* page were checked against the Document Center interface source (`a8e9f24`) and service source (`d3ab083`), and the *Page not found* screen was added from the same source; those details are marked as not observed in each screen's *Content status*. On 2026-10-23 the *Dashboard* and the *Upload document* dialog were updated to the behaviour of Document Center interface pull request #143 and service pull request #171 (WOR-168); not observed.

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. The numbers load for every profile. Uploading, searching, browsing folders and sharing are refused by the service unless the profile is a company administrator or technical profile, so the **Quick actions** show only for those profiles; the others see *Your profile sees the dashboard only. Uploading, searching, browsing folders and sharing are for company administrators and technical profiles.* in their place.
Content status	Observed (2026-10-18). Field details checked against the Document Center interface source (`a8e9f24`) and service source (`d3ab083`) on 2026-10-22; not observed.

Numbers. Four tiles. Each shows **—** while loading or if the numbers could not be loaded. Numbers are grouped the way the interface language writes them (for example 2,847 in English).

Tile	What it counts
In progress	Processes with status *New*, *Processing* or *Awaiting review*
Completed	Processes with status *Completed*
Uploads today	Documents created since midnight (UTC), shown as `+n`; **0** when there are none
Documents	All documents of your company

Daily volume. Processes received per day over the last 14 days, one bar per day. Only the first, middle and last days carry a date under the bar; hover a bar for its date and count. With none, the chart shows *No processes in the last 14 days.*

Quick actions. Shown to company administrator and technical profiles (and the Cogneris administrator and technical operators). While the profile is still being read the tiles show. Each tile has a title and a short description.

Tile	Description on the tile	What it does
Upload document	*Drop a PDF, image, or office file. We extract text, tag it, and add it to search.*	Opens the Upload document dialog
Search documents	*Full-text search across every page. Filter by file type, status, confidentiality or tag.*	Opens the document search
Browse folders	*Navigate your tenant's folder tree. Inherit ACLs, move documents, pin shortcuts.*	Opens the folder explorer

Tile	Description on the tile	What it does
Public shares	*Create public links protected by an expiry, a password and an access limit.*	Opens the folder explorer; links are created, listed and revoked from a document's page (**Share**, **Active share links**).

The **Browse folders** description still promises more than the explorer offers: it cannot move documents or pin shortcuts.

Buttons and actions

Button	What happens	Who can use it	Reversible?
Upload document	Opens the Upload document dialog. After an upload the numbers reload.	Company administrator or technical profile	—
Search documents	Opens *Search documents*	As above	—
Browse folders, **Public shares**	Open the *Explorer*	As above	—
Try again	Loads the numbers again	Everyone who sees the screen	—

Common problems

Message	Cause	What to do
We couldn't load your dashboard stats. with **Try again**; tiles show **—**, quick actions still work	The numbers could not be loaded	Select **Try again**; if it persists, contact support
No processes in the last 14 days.	No process arrived in the last 14 days	Nothing to fix

Upload document dialog

Add one file to a folder.

How to get here	**Dashboard** › **Upload document**
Who sees it	Company administrator and technical profiles, from the Dashboard's **Upload document** tile.
Content status	Observed (2026-10-18, a PDF uploaded into a top-level folder; **Uploads today** went up by one). Field details checked against the Document Center interface source (`a8e9f24`) and service source (`d3ab083`) on 2026-10-22; not observed.

Fields

Field	What it does	Required	Format / values	Default	Validation messages
File (**Drop a file here** / **or click to choose**)	The file to upload. Drop it on the area or select the area to choose it. The chosen file shows with its name and size.	Yes	One file; a second drop replaces the first. Hint: *PDF, image, Word — up to 50 MB*. The screen does not check the type; a file above the limit is refused before it is sent.	None	**Upload** stays disabled until a file is chosen; *…: the file is larger than 50 MB, the upload limit.*

Field	What it does	Required	Format / values	Default	Validation messages
Destination folder	The folder that receives the document	Yes	Top-level folders only, by name. Folders created after the Dashboard opened appear only after the page is reloaded.	The first folder in the list	*No folders yet — create one in Browse first* when there is none; *Could not load folders* when the list could not be loaded

The new document gets the file's name, status *Draft* and confidentiality *Internal*.

Buttons and actions

Button	What happens	Who can use it	Reversible?
× next to the file	Removes the chosen file	Everyone who sees the dialog	Yes
Upload	Creates the document in the folder, then uploads the file as version 1. Shows **Uploading…** while running; the dialog closes when it succeeds. If the file upload fails, the document just created is removed again, so no empty document is left in the folder.	Company administrator or technical profile	No — the interface has no action to delete an uploaded document
Cancel, **×** in the header, **Esc**, a	Closes without uploading. While uploading, **Cancel**, **×** and **Esc** are disabled.	Everyone who sees the dialog	—

Button	What happens	Who can use it	Reversible?
click outside			

Limits and quota

From the service source; not observed:

- Files can be up to 50 MB (50,000,000 bytes), the limit of every upload of the service; the dialog refuses a larger file before sending it.
- Each new document counts against the company's monthly document quota. Only the first version of a document counts.

Common problems

Message	Cause	What to do
No folders yet — create one in Browse first	No top-level folder exists	A company administrator creates a folder in the *Explorer*
Could not load folders in **Destination folder**	The folder list could not be loaded	Close the dialog and open it again; if it persists, contact support
…: the file is larger than 50 MB, the upload limit.	The file is above the upload limit; nothing was sent	Use a smaller file
Upload failed. Try again or contact support.	The upload failed without a reason from the service	Try again; if it persists, contact support
monthly quota exceeded (…/…)	The company reached its monthly document quota (used / limit)	Wait for the next month or ask about the plan

Message	Cause	What to do
The request body contains input that is not allowed.	The service's input check rejected the file; not observed	Use another file; if it persists, contact support
folder not found, *document not found*, *storage generation unavailable*, or another message from the service	The service refused the upload and gave its own reason, in English as the service writes it	Read the reason; try again; if it persists, contact support

When the document is created but the file upload then fails (for example over the quota), the dialog removes the empty document again. A document whose file did reach the service is never removed by this clean-up.

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). Field details checked against the Document Center interface source (`a8e9f24`) and service source (`d3ab083`) on 2026-10-22; not observed.

Area	Content
Header	*Shared document*, the title **Shared document** and *Open a protected document shared with you.*

Area	Content
Steps	**Validate link** › **Unlock access** › **Preview document**
Status	**Protected share** until opened, then **Document ready**
Security notes	**Protected share** — *This link is validated before the document is shown.*; **Scoped access** — *Access is limited to this shared document session.*; **Optional password** — *Password-protected shares require the original password.*
Preview	PDF page by page; PNG and JPG images. Other types: *Preview not supported for this file type.*
File, **Type**	Name and type of the shared file, after opening

How the link works (from the service source; not observed). The link opens as many times as it is valid for — in any browser and on any device — until it expires, reaches its access limit or is revoked. Each opening starts a session in that browser that lasts one hour, or until the link's expiry if that comes first; within it, the page can be reloaded. Revoking the link also ends the sessions already open.

Fields

Field	What it does	Required	Format / values	Default	Validation messages
Enter password	The password the sender set on the link	Only for links protected with a password; otherwise leave empty	Hidden text	Empty	*Could not open the link.* when it is wrong

Buttons and actions

Button	What happens	Who can use it	Reversible?
Open	Checks the link (and password) and shows the document. Each successful opening counts one access against the link's maximum, if it has one.	Anyone with the link	—
‹, **›**, *Page … of …*	Turn the pages of a PDF of more than one page	Anyone who opened the document	—
Download	Downloads the file. Shown when the sender allowed downloads — links created with **Share** always do. The download address works for 15 minutes after **Open**.	Anyone who opened the document	—

Common problems

Message	Cause	What to do
Could not open the link.	The link is revoked, expired or used up; the password is wrong; the one-hour session ended; or the link could not be verified	Check the password; otherwise ask the sender for a new link
Preview not supported for this file type. with *Supported: PDF, PNG, JPG. Other formats (DOC, XLS, etc.) on the future roadmap.* and **Download**	The file is not a PDF, PNG or JPG	Use **Download**
Download no longer works	More than 15 minutes passed since **Open**	Reload the page within the hour and select **Open** again

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

Not observed: a password-protected, expired or used-up link, a link opened a second time, and *Could not open the link.* Links created before the share dialog gained its password, expiry and access-limit fields (Document Center interface `f6057c5`, after the 2026-10-18 observation) had none of them and allowed downloads.

Page not found

How to get here	An address of the Document Center that does not exist
Who sees it	Everyone
Content status	From source; not observed (Document Center interface `a8e9f24`, 2026-10-22).

Shows *404* and *Page not found*.

Buttons and actions

Button	What happens	Who can use it	Reversible?
Go home	Opens the Dashboard	Everyone	—

Last reviewed 2026-10-23 · Version 1.2.0 · Owner: product-documentation

Chapter versions

Chapter	Version	Last reviewed
Start here	`1.0.0`	2026-10-09
Collect and review documents	`1.0.0`	2026-10-09
Sign and file a document	`1.0.0`	2026-10-09
Sign in	`1.0.0`	2026-10-22
Multi-factor authentication	`1.0.0`	2026-10-22
Your team	`1.0.0`	2026-10-22
Profiles and what they allow	`1.0.0`	2026-10-22
Billing and usage	`0.1.0`	2026-10-08
Portal overview	`1.0.0`	2026-10-18
Prepare a form	`1.0.0`	2026-10-09
Send an access link	`1.0.0`	2026-10-09
Complete a document request	`1.0.0`	2026-10-09
Follow up an access link	`1.0.0`	2026-10-18
Ask your company for support	`1.0.0`	2026-10-18
Portal screens	`1.0.0`	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	`1.2.0`	2026-10-09
Sign overview	`1.0.1`	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	`1.2.0`	2026-10-23
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	`1.2.0`	2026-10-23