User Manual

Viafirma Inbox

Table of Contents

Viafirma inbox user manual

This guide describes how to use Viafirma Inbox application for end users. It will introduce each one of the public sections of the application, with a detailed explanation of how each one of them works.

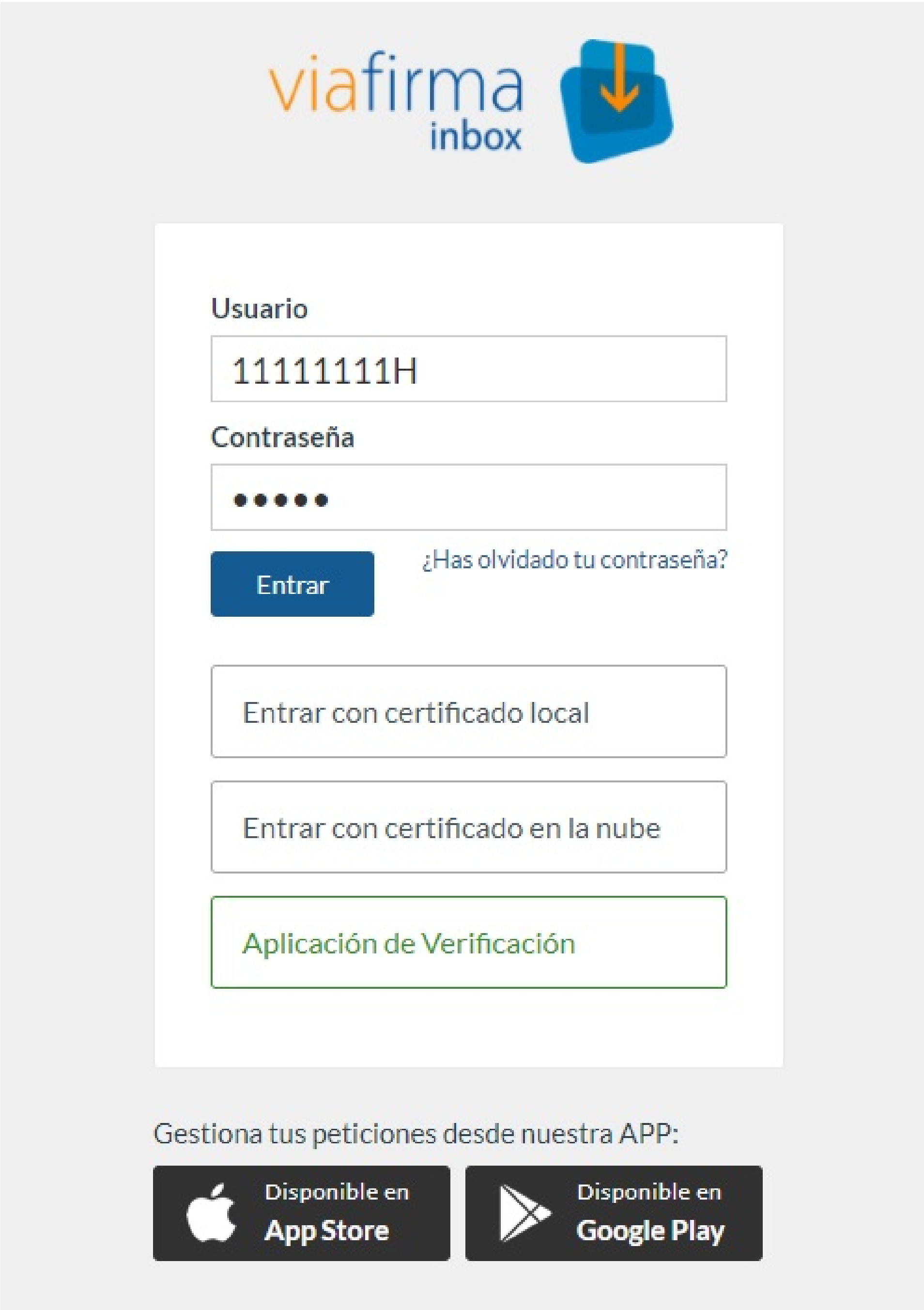
You can download this manual in pdf format

- Spanish.
- English.
- Catalan.

Access to web app

To access the web app the user must authenticate himself in the system with a valid user ID. The user must do this through some of the enabled options, all of them can be configured by the system administrators. These are:

- "Login with local certificate" in case the user owns a digital certificate stored on their computer or "Login with cloud certificate" if it's stored remotely.
- “Username” and “Password” in case you have valid credentials



Lastly, if the system administrator enables the Signature Verification option, the **Access to the Signature Verification Application** feature is available, from which we can enter a request code to check the status of a request for signature.

Automatic user enrollment

Depending on the configuration made by the administrators the system may behave in different ways. If a user logs in with a digital certificate and the system has not registered the user, the system can behave as follows:

- Not allowing the user to log in.
- Allows the user to self-register, but still requires validation from an administrator.
- Allowing a direct self-registration of the user who may start working once the registration process is finished.

If the system administrators have configured the web application this way, users accessing Viafirma Inbox for the first time with their certificate will be forwarded to the registration form.

Si usted accede a **Viafirma Inbox** porque le han enviado una petición, es muy importante que complete el campo *Código Invitación* con el código facilitado en el email de invitación. Si no completa dicho campo con el código facilitado no podrá recuperar la petición que le habían enviado.

Person Id *(*)*

12345678A

Nombre *(*)*

Primer apellido *(*)*

Segundo apellido

Email *(*)*

Teléfono

Idioma

Castellano ▾

Contraseña *(*)*

Confirmar contraseña *(*)*

Zona horaria

(GMT +1:00) Brussels, Copenhagen, Madrid, Paris ▾

Codigo de Invitación

Nivel de notificaciones por email

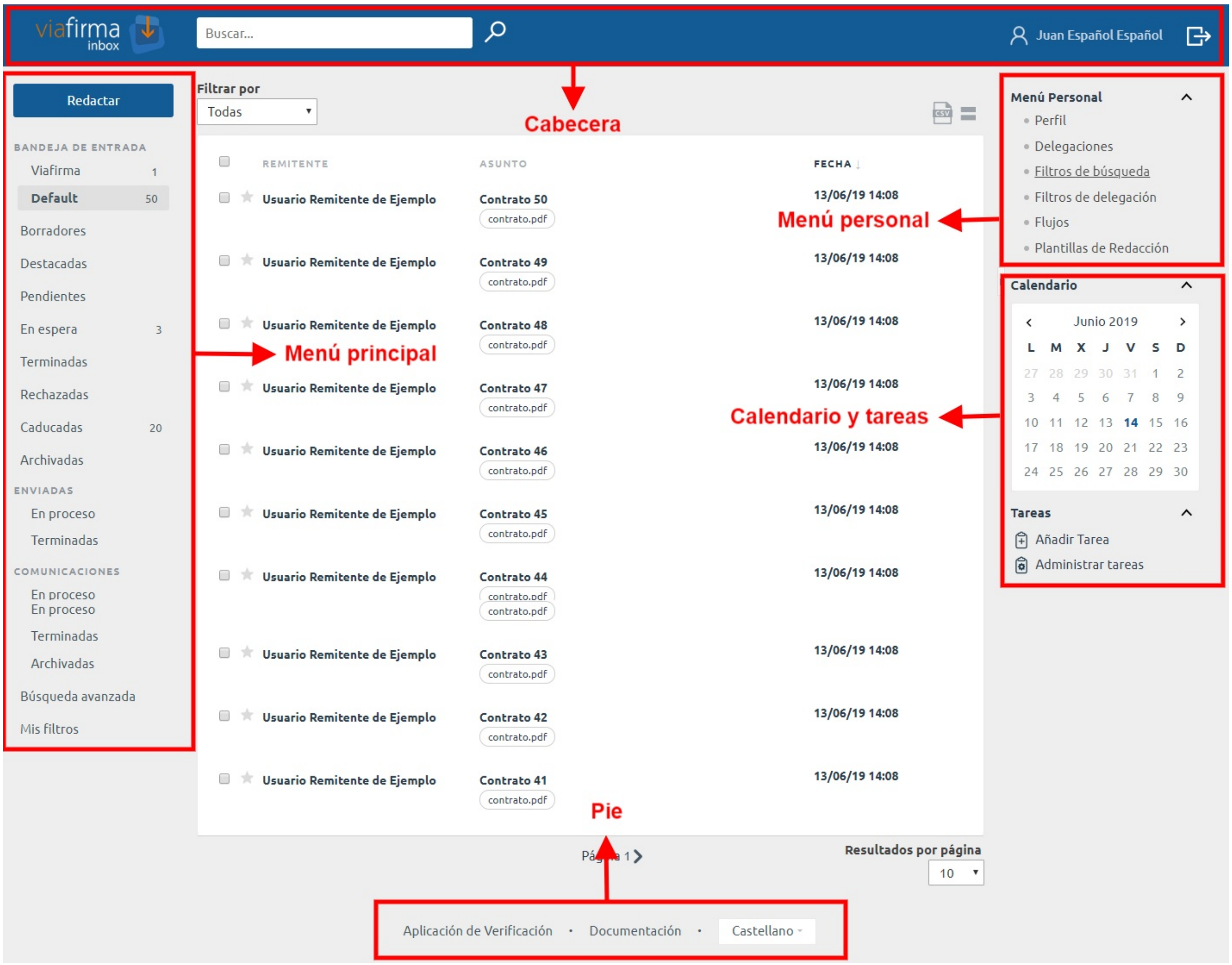
Alto ▾

Guardar

Interface

Viafirma Inbox interface includes the following sections:

- Header
- Home
- Personal menu
- Calendar & Tasks
- Footer



Header

In the application header you will find the following options:

- **Home**: takes you to the last visited inbox.
- **Search**: allows you to locate requests that meet the search criteria. The fields used for the search are:
  - Subject
  - Message
  - Reference
  - Request identifier
  - Sender's first name
  - Sender's last name
  - Sender's Person Id
  - Sender's Email
  - Recipient's first name
  - Recipient Last Name
  - Recipient's Person Id
  - Recipient's Email
- **User's full name**: Link to User profile.
- **Log out**: Ends user session.

Home

The left side menu allows access to managing requests and other options of interest. The following links are available:

- **Compose**: link to the request form page. It will be explained later in detail.
- **Inbox**: main list of requests. The inbox shows the requests sent to the authenticated user. The number of unread requests appears to the right of the inbox. New (unread) requests are easily identified as they are in bold. If the user has more than one entity associated with him/her and this option is enabled by the system administrator, then an inbox for each entity associated to the authenticated user will be displayed.
- **Drafts**: list of requests to be sent. When selecting a draft the drafting screen is displayed with the data stored in the draft.
- **Highlighted**: users have the option of marking a request as top priority, clicking on the star icon located on the left in any request list. The request will then be visible in this menu, and will be always displayed at the top of the lists, even if it is not the most recent one.
- **Pending**: Pending requests are those that the user has already signed (or approved), but are yet to be signed by other recipients.
- **On hold**: requests on hold are awaiting signature by a recipient, so that the user can sign (or approve) the request.
- **Completed**: list of finished requests submitted by the user. This section allows you to filter the requests based on their status: completed, expired or rejected.
- **Rejected**: list of requests that have been returned (rejected) by a recipient. Arejected/returned request cannot be recovered.
- **Expired**: list of requests that have reached their expiration date before being successfully completed, so they cannot be recovered for signature.
- **Archived**: Requests archived by the user.
- **Sent**:
  - **In process**: Requests sent by the user that are still pending.
  - **Completed**: Requests sent by the user that have been completed. Here you can filter the requests based on their status: completed, expired or rejected.
- **Communications**: list of requests where the user has been marked as the final recipient (communication), despite not being involved in the signature workflow. For example, the approval of a resolution can be communicated to a manager, even if he/she has not participated in the signature workflow or approval.
  - **In process**: Requests that have not been completed.
  - **Finished**: Completed requests. Here you can filter the requests based on their status: finished, expired or rejected.
  - **Archived**: Requests archived by the user.
- **Advanced search**: advanced search options for requests.
- **My filters***: users can store their most common searches and use them whenever necessary. In the ***Search filters*** section of your ***Personal Menu*** the filters created by the user will appear.


Redactar
BANDEJA DE ENTRADA
Viafirma 1
Default 50
Borradores
Destacadas
Pendientes
En espera 3
Terminadas
Rechazadas
Caducadas 20
Archivadas
ENVIADAS
En proceso
Terminadas
COMUNICACIONES
En proceso
Terminadas
Archivadas
Búsqueda avanzada
Mis filtros

Personal menu

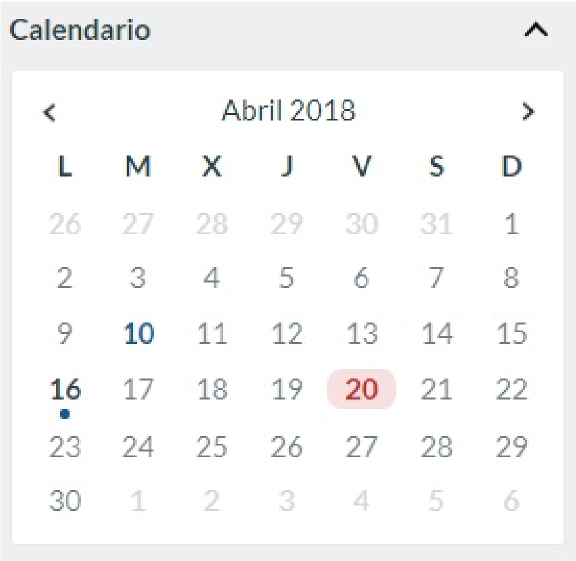
On the right side of the screen you will see the **Personal Menu** block with the following options:

- **Profile**: access to the user profile. This section allows the user to modify their personal data. This will be explained in detail later.
- **Delegations**: access to the delegations performed by the user or those in which the user is the recipient or is involved somehow, and the status of these delegations. This will be explained in detail later.
- **Search filters**: Filters can be created/edited with different search criteria to simplify our work when locating an element.
- **Delegation filters**: You can create/edit filters with different characteristics that can then be associated to the delegations. For example, you would like the delegated user to view only those requests that contain a certain subject or whose sender is one particular user. Filters can be applied to any active delegation. This will be explained later in detail.
- **Workflows**: access to the signature workflows saved by the user. Here the user can manage his signature workflows to use them when composing requests. This will be explained later in detail.
- **Writing Templates**: Access to the user's drafting templates. Templates can be created/edited to speed up the process. Adrop-down menu with all the templates is displayed when writing a request. Just ***click*** on the one you wish to use. This will be explained later in detail.

Calendar & tasks

The calendar and task organizer can be found in the right side menu.

Calendar

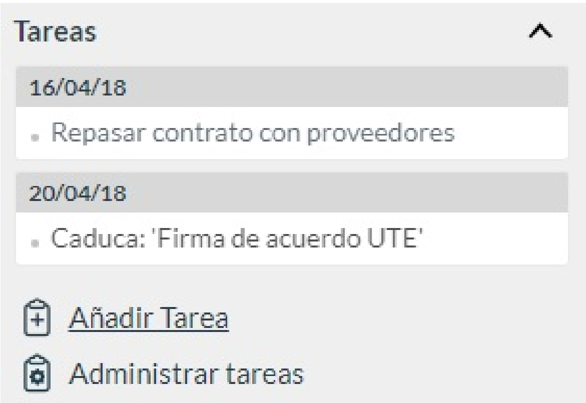


It shows the current month by default, and can be manually scrolled to earlier and later months. It highlights important dates:

- The expiry dates of requests are marked in **red**.
- Pending tasks are marked with a **blue dot**

When clicking on a highlighted date, a small bubble will be displayed with information related to that day.

Tasks

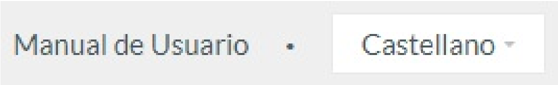


Shows a list of tasks/events organized by dates.

The user can manage his tasks by clicking on **Add Task** and **Manage Tasks**.

All these panels can be opened / closed by clicking on the upper right corner controls.

Footer



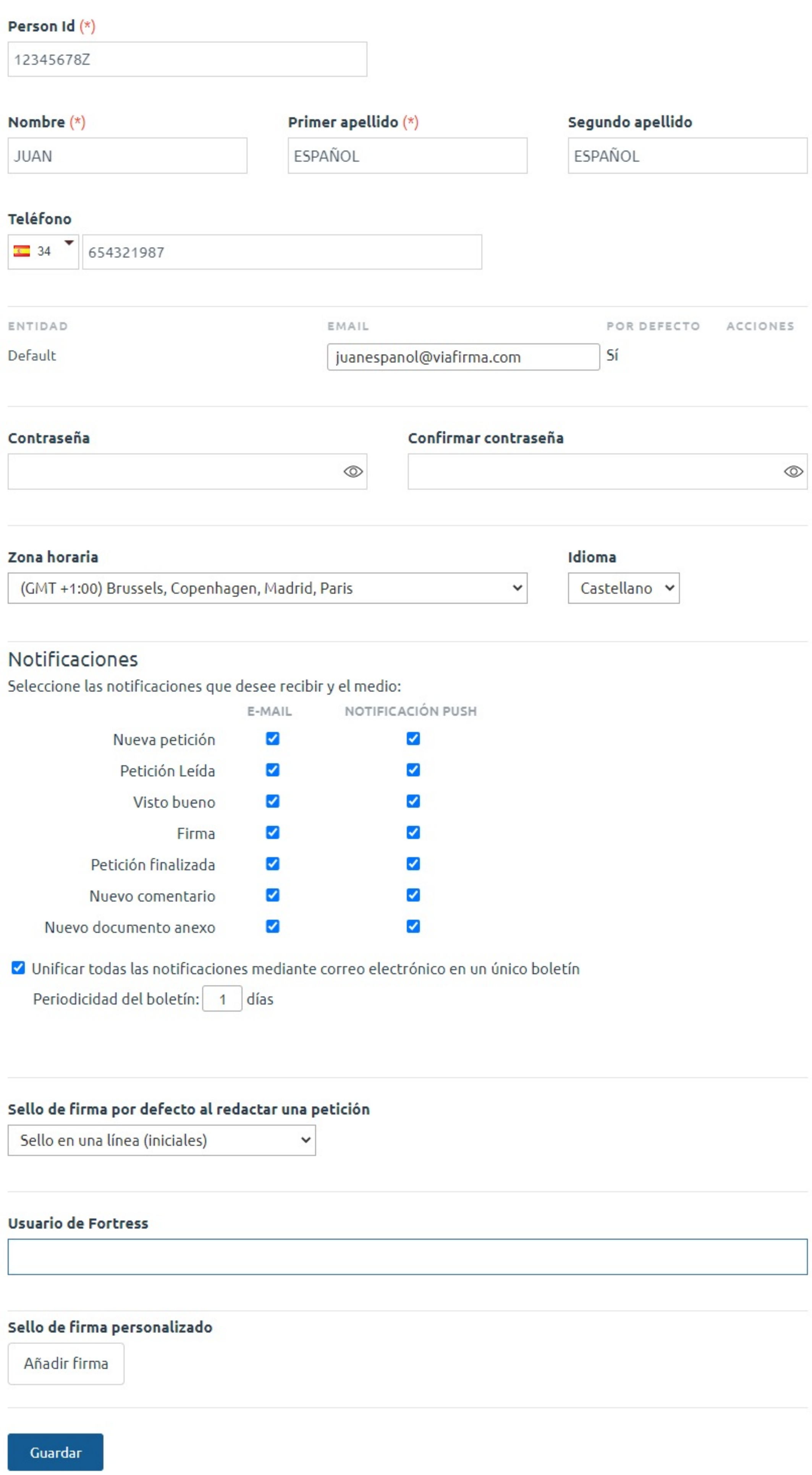
In the footer section you will find the following options:

- **User guide**: link to download the user guide.
- **Language**: allows you to change the language of the interface.

User Profile

There are 2 ways to access your user panel:

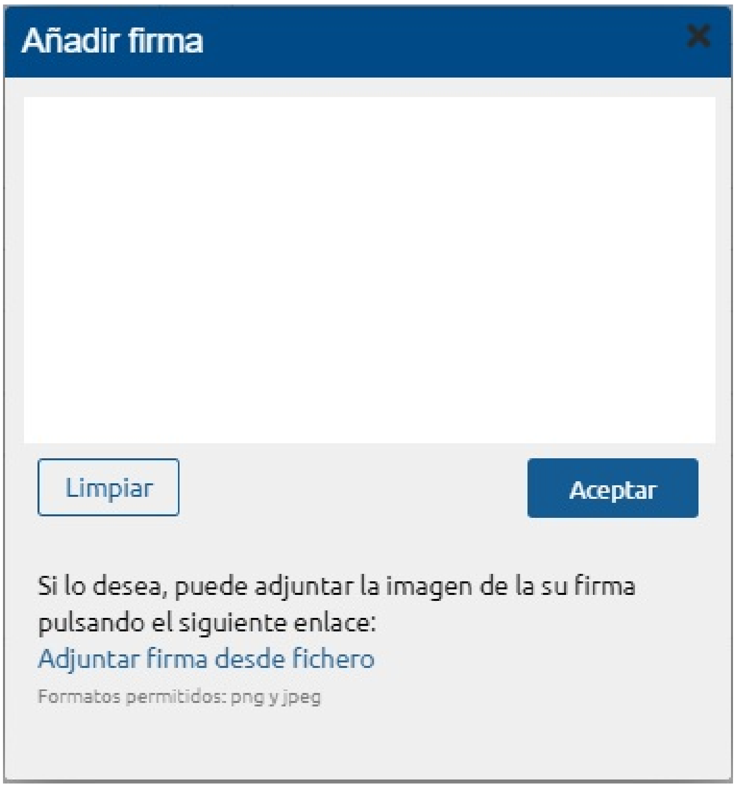
- By clicking directly on your name located at the top right.
- From the "Profile" option in the personal menu.


Person Id (*)
12345678Z
Nombre (*)
JUAN
Primer apellido (*)
ESPAÑOL
Segundo apellido
ESPAÑOL
Teléfono
34
654321987
ENTIDAD
EMAIL
POR DEFECTO
ACCIONES
Default
juanespanol@viafirma.com
Sí
Contraseña
Confirmar contraseña
Zona horaria
(GMT +1:00) Brussels, Copenhagen, Madrid, Paris
Idioma
Castellano
Notificaciones
Seleccione las notificaciones que desee recibir y el medio:
E-MAIL
NOTIFICACIÓN PUSH
Nueva petición
Petición Leída
Visto bueno
Firma
Petición finalizada
Nuevo comentario
Nuevo documento anexo
Unificar todas las notificaciones mediante correo electrónico en un único boletín
Periodicidad del boletín:
1
días
Sello de firma por defecto al redactar una petición
Sello en una línea (iniciales)
Usuario de Fortress
Sello de firma personalizado
Añadir firma
Guardar

First of all there is a personal data box to manage the following information:

- Person Id** (username to used for login, and obtained from a field of the digital certificate).
- **Name**: User's name.
- **First surname**: User's surname.
- **Second last name**: User's last surname (if any).
- **Email**: User's email address.
- **Phone**: User's phone number. Must include the international prefix.
- **Password**: User's password (if you do not wish to change the password, leave both fields empty).
- **Time Zone**: User's time zone.
- **Language**: language in which you wish to receive the emails generated by viafirma inbox.
- **Notifications**: Shows the actions of the lifecycle of a request on which you want to receive notifications. They can be selected at e-mail and push notifications level from viafirma inbox phone app. You can also select that email notifications shall be grouped in a single newsletter that can be modified periodically.
- **Default signature stamp when writing a request**: the signature stamp selected by default when writing a request will be displayed. Possible options are:
  - **Default signature stamp of the system**: the default signature stamp assigned by the system will be used.
  - **No signature stamp**: no signature stamp will be used.
  - **Specific signature stamp**: the selected signature stamp will be taken.
- **Fortress user**: User code in Viafirma fortress.
- **Custom signature stamp**: For those instances that have configured the use of custom signature stamps you can select your own signature image. These signature images will be used in case the sender of the request has selected a signature stamp that supports this.

  To add a new custom signature stamp click on the *Add signature* link. Apopup will appear where you can draw the signature or add a signature from a file stored on your computer.

  If you have already added a signature you can modify or delete it.

  If a customized signature stamp is not defined, a generic stamp will be generated at the time of signing.

For users with more than one entity, instead of showing the email field as in the previous image, a list of the entities linked to the user and the email assigned to each entity is displayed. The user can select which is the default email for notifications.

Entidad	Email	Por defecto	Acciones
Default	usuario@viafirma.com	Sí	
viafirma	usuario@viafirma.com	No	✓
viavansi	usuario@viavansi.com	No	✓

And finally, if the platform has been configured by the administrators, there could be a configuration block for accessing the user's personal document repository (Alfresco, Nuxeo, Documentum FileNet, Sharepoint, etc.):

This technical data will be provided to you by the system's technical manager.

Write a request

By clicking on the **Draft** link on the left side panel the user has access to a drafting form for a new request. There are two drafting modes: basic and advanced drafting.

- **Basic drafting**: The content will depend on the configuration of your instance. Thus, the fields recipients, subject, message, documents for signature, attached documents and sender notification level will always be displayed.
- **Advanced drafting**: The advanced drafting contains all fields available in the drafting section.

The first time you access the drafting the basic type is shown. For the rest of the accesses, the last used redaction type will be shown. To switch from one type to the other click on the link *Switch to advanced editing* or *Switch to basic editing* at the top right of the page.

Cargar desde Plantilla ▾

Cambiar a redacción básica

Remitente

falba@viafirma.com (Default) ▾

Destinatarios ?

Destinatarios

Guardar flujo

Previsualizar Flujo

☐ Enviar de forma independiente a cada uno de los destinatarios

Destinatarios de la comunicación interna

Añada usuarios que podrán ser comunicados con el resultado de esta petición cuando sea finalizada

Asunto (*)

Asunto

Referencia

Escriba una referencia para identificar a la petición

Tipo de acceso a la verificación de firmas ?

Acceso Público ▾

Mensaje

Mensaje

Tipos de firma admitidos ?

Todos los tipos de firma (certificado, OTP SMS, firma web) ▾

Fecha de inicio

Fecha de Caducidad

Sello de firma

Sello por defecto ▾

Metadatos

Tipo de Documento

Código del expediente en curso

Añadir metadato

Documentos a firmar

Subir documento

Puede subir un máximo de 10 documentos a firmar, hasta alcanzar, en total, un límite de 50 Mb

Documentos anexos

Subir anexo

¿Desea recibir notificaciones de las acciones relacionadas con esta petición?

- (•) No
- ( ) Aviso de lectura, firma, visto bueno, rechazo y finalización del flujo
- ( ) Aviso de firma, visto bueno, rechazo y finalización del flujo
- ( ) Aviso de finalización del flujo

Enviar

The available fields in the draft are:

- **Upload from template**: Available for users who have associated templates. After selecting a template, all fields of the drafting will reload with the data entered in the template.
- **Sender**: Available for users who have more than one associated entity. The user can select from which email account (depending on the entity) to send the request and thus the emails related to the request will be sent to that email account.
- **Recipients**: list of people to whom the request will be addressed. It's a required field. More information in the section Recipients of a request.
- **Save workflow**: Allows the user to save the recipient workflow to be reused in other requests, for example a workflow that he/she uses often in his/her requests.
- **Preview workflow**: Allows the user to see the current workflow for the request he/she is writing.
- **Subject**: Subject of the request. Required field.
- **Message**: Message attached to the request, explaining the context of the request so that recipients can quickly understand it.
- **Reference**: free text field that can be used by third party systems to retrieve the request, for example, a code used by another application.
- **Signature verification access type**: requests have an associated permalink (based on a Secure Verification Code CSV) allowing consultation from outside the application in the verification platform (if enabled by the system administrators). This field determines the level of access to the request in this verification platform. It allows you to choose one of the following types:
  - **Not available**: the request is not allowed to be accessed from the signature verification.
  - **Public Access**: anyone with the URL / Secure Verification Code can access the request. It is useful when we want to send a link of the request details to an external third party (e.g. a citizen or stakeholder).
  - **User / Password**: if this option is chosen, it will also be necessary to enter the user and password to access the request. Anyone who knows the password and the URL / CSV will be able to view the request.
  - **Certified**: the request can be viewed by both the requester and the recipients who have participated in the signature workflow with their digital certificate.
  - **Private**: the request can only be accessed by the creator of the request.
- **Supported signature types**: Allows to select which types of signature are accepted for this request. If a signature type is not enabled (e.g. SMS/OTP signature or web digital signature) it cannot be used.
- **Start date**: Date on which the request will appear in the recipients' inbox. This option is used when you wish to create a deferred request, that is, a request that is created today so that the signing process can begin a day later.
- **Expiration date**: Date on which the request expires; if it's 23:59 of the marked day and the workflow has not been completed, the request is completed in "Expired" status, and no further intervention can be performed. Users who take part in the workflow will be marked on the calendar in ***red*** with the expiration date of the request. Expired requests can be reactivated by the sender user.
- **Signature stamp**: Signature stamp to be used in the signed document among the signature stamps registered in the request. The signature stamp defined by the administrators of the instance will be used by default.
- **Metadata**: the system allows to freely add metadata (key/value pairs, e.g. file code: 2011/PRE/01234). In addition, administrators can create global metadata that would appear in this area. Anew metadata can be added by clicking on the *Add metadata* link, which will bring up a form to add the key and value of the new metadata.
- **Documents for signature**: Documents to be signed by the recipients. More information in the section
- **Metadata**: the system allows to freely add metadata (key/value pairs, e.g. file code: 2011/PRE/01234). In addition, administrators can create global metadata that would appear in this area. Anew metadata can be added by clicking on the *Add metadata* link, which will bring up a form to add the key and value of the new metadata.
- **Documents for signature**: Documents to be signed by the recipients. More information in the section Documents to be signed.
- **Attachments**: Attachments are files that are not digitally signed, and only support the recipient's decision to sign or approve the request. When signing a request, for example, the signatory will probably want to have access to certain documents in the file. To add an attachment, click on the link *Upload attachment* and the file browser will be displayed to select the attachment.
- **Do you wish to receive notifications of actions related to this request?**: The sender of the request can specify

whether he/she wishes to receive notifications and their level of notification for actions performed by the recipients of the request.

- **Send**: Button to create a new request. There are three possible scenarios for this button:
- If there are external users who can perform the signature or in case the selected signature stamp has the individual stamps option activated the [signature positioning] screen will be displayed (stampposition.html).
- If there are new users. Check Unregistered recipients.
- If none of the above requirements are met, the request is created and the user is redirected to the inbox.

Organizing recipients

In the Recipients field of the new request, we define the signing/approval workflow for the request typing the list of recipients separated by:

- **()** (Brackets) Indicate group of users who can sign in any order. ,** (comma) Used for separating separate signature lines, or users between brackets.
- **>** (greater than sign) To indicate the hierarchy of signatories; the recipient (or recipients if in a group in brackets) on the left of > must sign/approve before the recipient (or recipients if in a group in brackets) on the right.

Example: (User 1 > User 2), User 3.

Here are two signature lines; User 1 and User 3 can already sign the request, while User 2 will only be able to sign after User 1 has signed.

- ||* (or) To specify a signature workflow where only one of the recipients has to perform the action.

Example: User 1 || User 2

The request must be signed by User 1 or by User 2. As soon as one of them signs the request, the request will be completed without any action by the other recipient.

On the other hand, to specify the type of action (signature or approval) to be performed by a recipient, you must add:

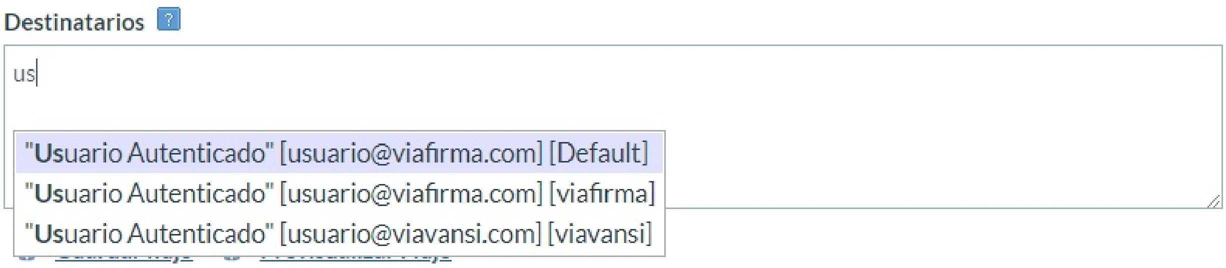
- **(F)** To request the signature. If no action is specified, the electronic signature is requested by default.
- (VB)** To request approval.

The difference between signature and approval is that in the approval there is no electronic signature embedded in the signed documents, and it has the same legal validity as a handwritten signature. An example can be someone that reviews the documents to be signed by his immediate superior.

Example: User 1 (VB) > User 2

In this case User 2 can only perform the signature after the approval of User 1.

The **recipient** field is predictive text: As the user types, suggestions are offered to choose from a list of recipients that match the text you are typing.



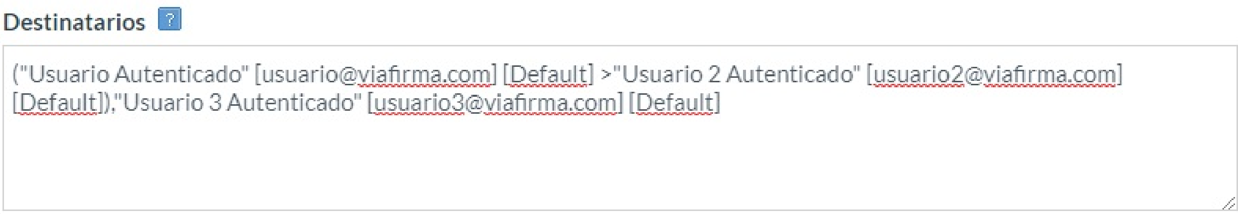
This list of suggestions includes:

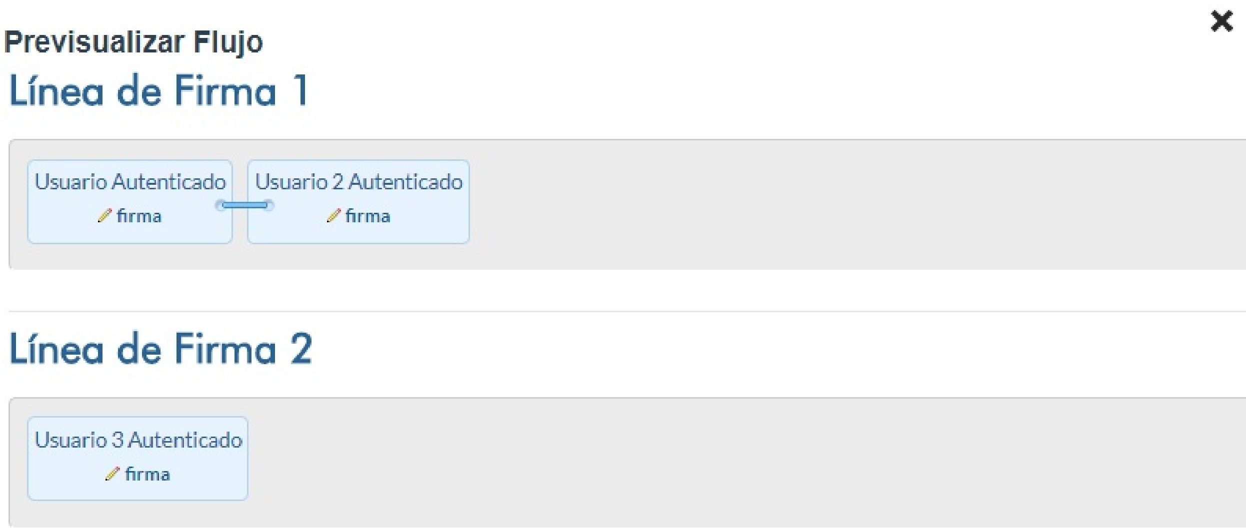
- **Users**: the system searches for the name / surname or email to add a specific user. In case there is more than one entity in the instance, the name of the entity will also be displayed and can also be searched in this field.
- **Groups**: adds ALL the users that belong to the selected group (if they have been created in the system by the administrators).
- **Positions**: adds ALL users that belong to the selected job title (if job titles have been created in the system by the administrators).
- **Workflows**: adds the whole workflow. In later sections we will explain how to create custom signature workflows that can be reused elsewhere. If we were to create a custom workflow called "Approval of minutes", the recipients box will indicate the use of this workflow when we enter characters like " apro", for example.

Below the recipient box there are two options: **Save workflow** and **Preview workflow**.

The **Save workflow** option allows us to quickly get to the customized workflow creation option (which will be explained later), based on the workflow we have on our screen.

On the other hand, the **Preview workflow** option shows a graphical representation of the signature workflow in the recipients box on the screen:

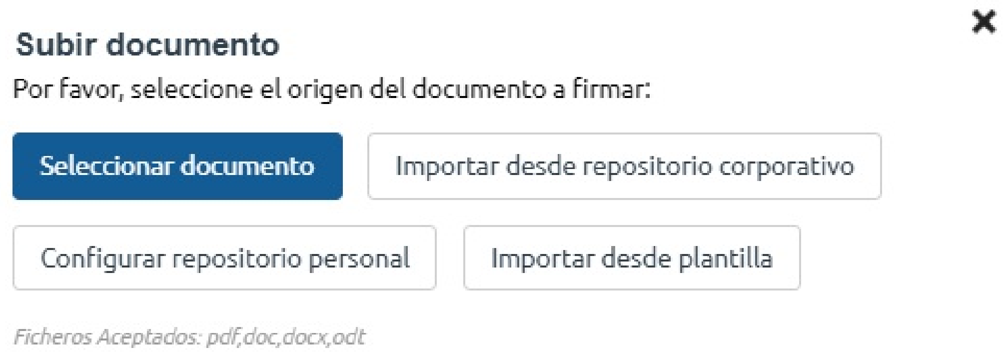




Documents for signature

To add a new document for signature click on **Upload document**. When you click on this button, it will depend on the possible options for uploading documents available in your instance. In the event that only the option to upload documents in the local computer is available, when pressing the button, the file explorer will be displayed to select the document.

If there is more than one option, a popup will appear with the different options available.

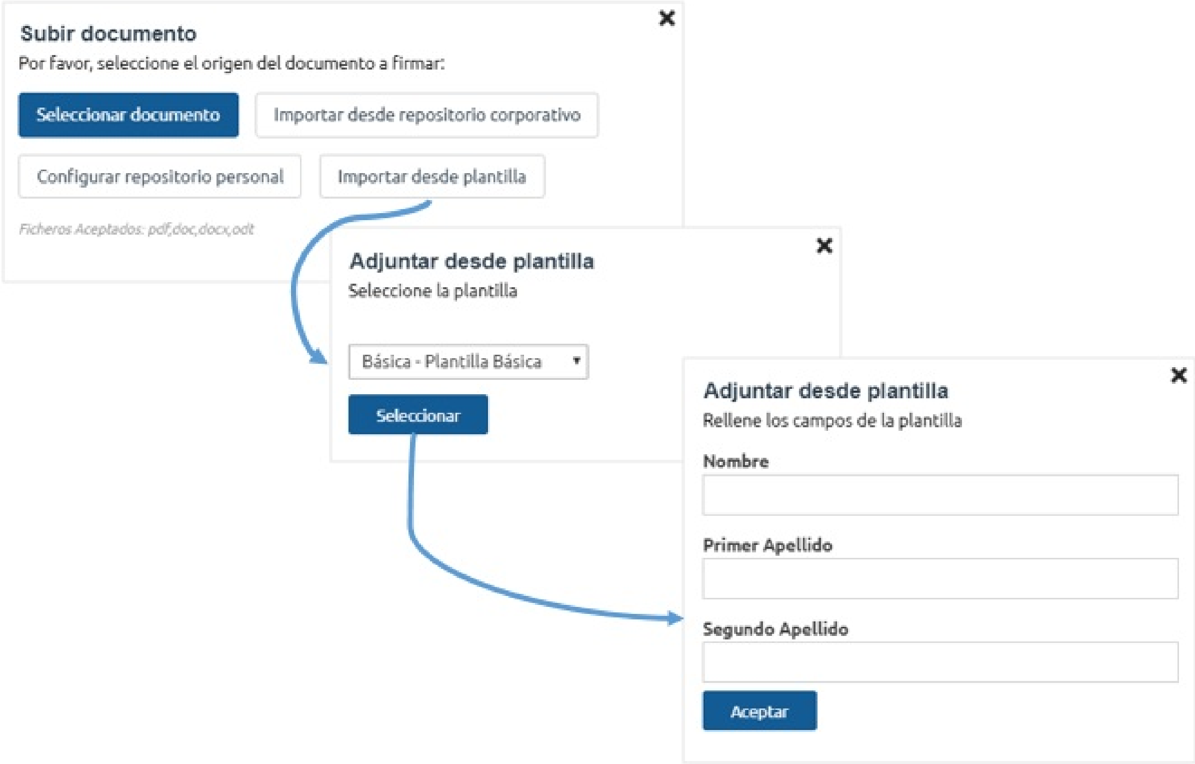


The possible options are:

- Select document: the file explorer will be displayed to select the document.
- Import from template
- Import from corporate repository
- Import from personal repository

Import from template

When clicking on *Import from template* a popup will appear to select the template you intend to use. After selecting the template, click on *Select* and you will see a form to fill in the template fields and click *Accept*.



Import from corporate or personal repository

When pressing on *Import from corporate repository* or *Import from personal repository* a popup with the repository content is displayed to select the desired document.

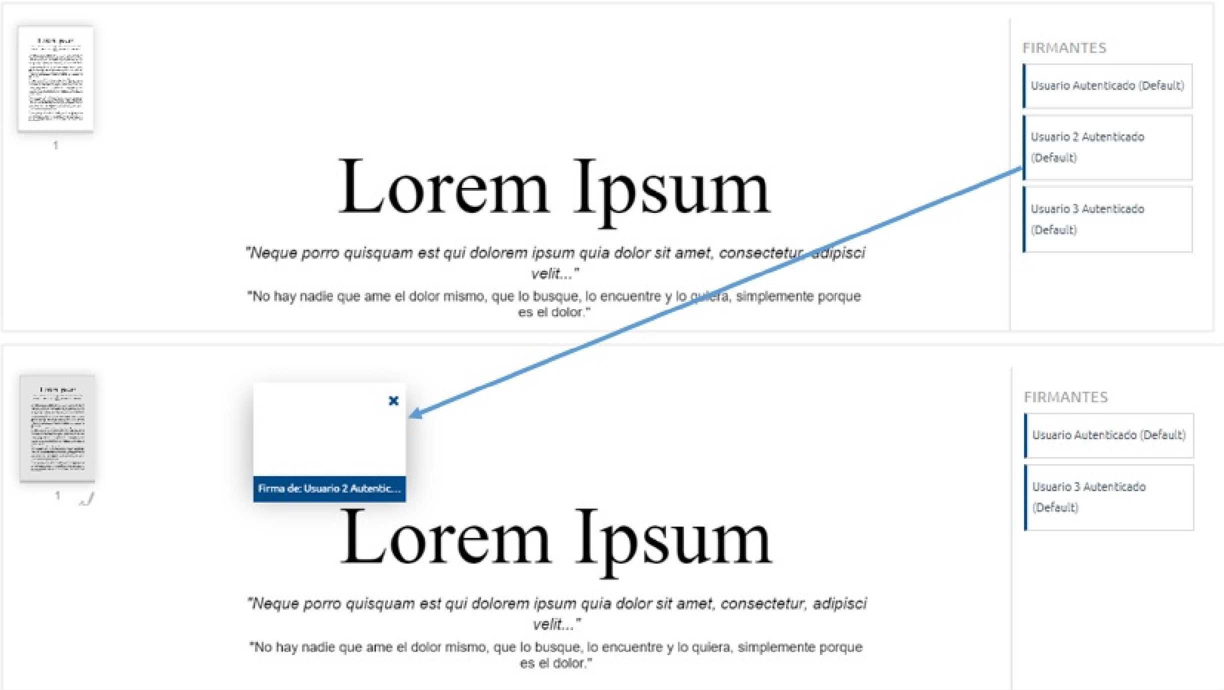
The options on the document are:

- Download document
- Attach for signature or approval
- Add as attachment

Signature positioning

For requests with external users who can perform the signature, the signature stamp, selected or the option of individual stamps activated, the signature positioning screen will be displayed.

The document is displayed and the signatures of the users to be positioned are shown on the right side of the screen. To place the signatures, drag the user's name in the document. The size of the signature box can be changed dragging the corners of the box.



Unregistered recipients

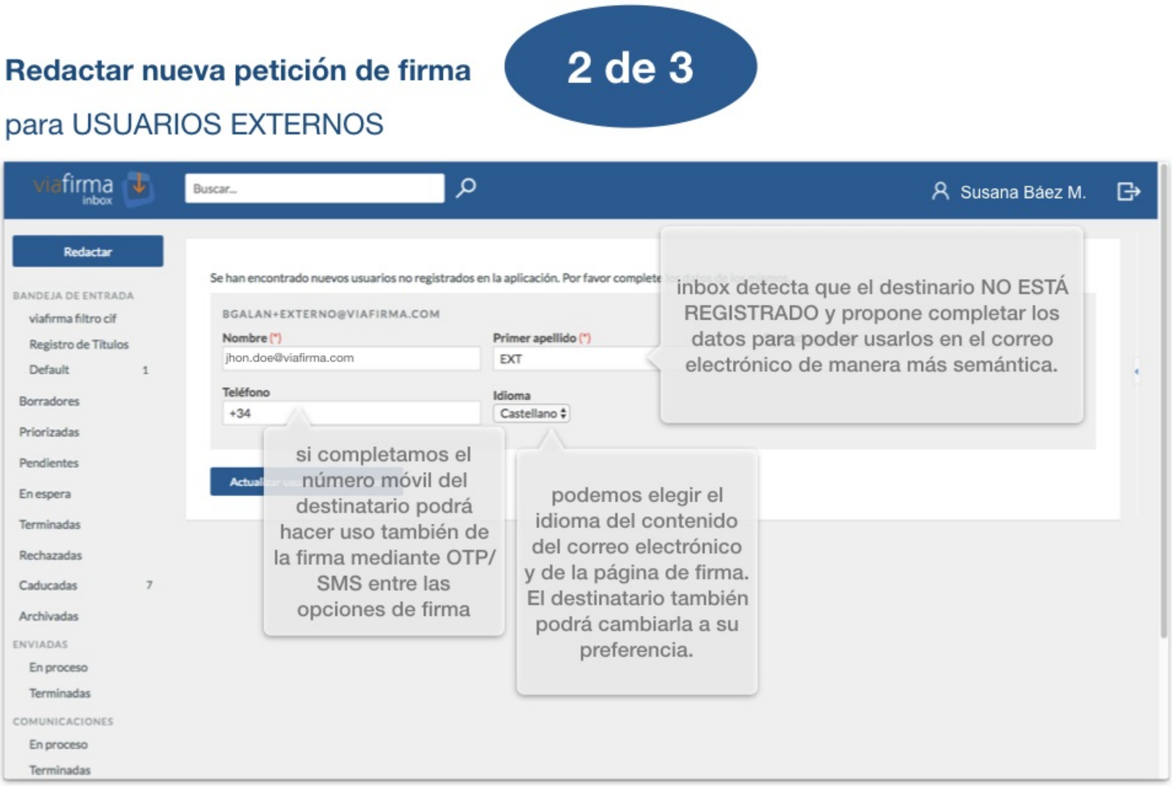
```
Last update: December 5th, 2018
```

With inbox you will be able to send signature requests to **UNREGISTERED USERS**, for which different rules will be applied depending on the global configuration of inbox in relation to the management of this type of users.

Although the global configuration of inbox allows external users to make use of all the signature mechanisms, you can decide whether you want to leave all the options open or force them to use a specific one, as shown in the screenshot above.

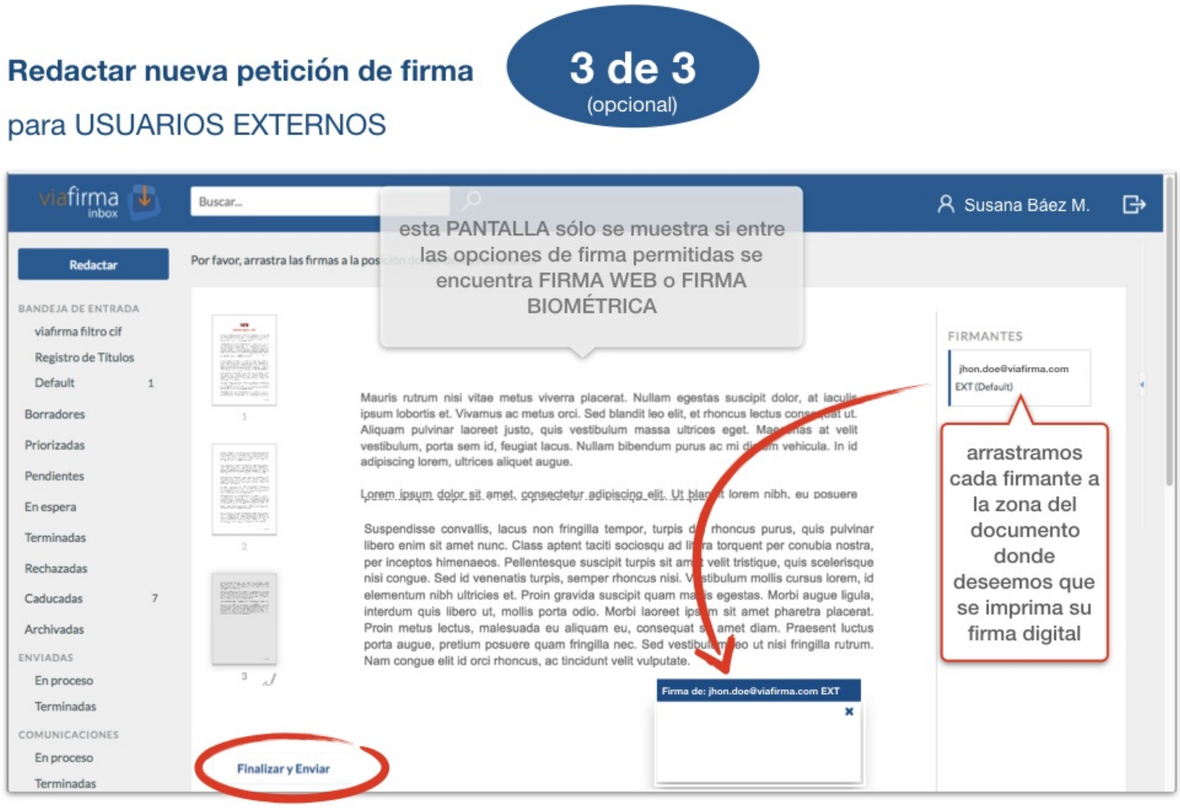
Fill in user information

When you finish writing the new signature request, inbox will detect that the user is NOT registered, and will ask you to fill basic information that will help us identify the user



Signature positioning designer

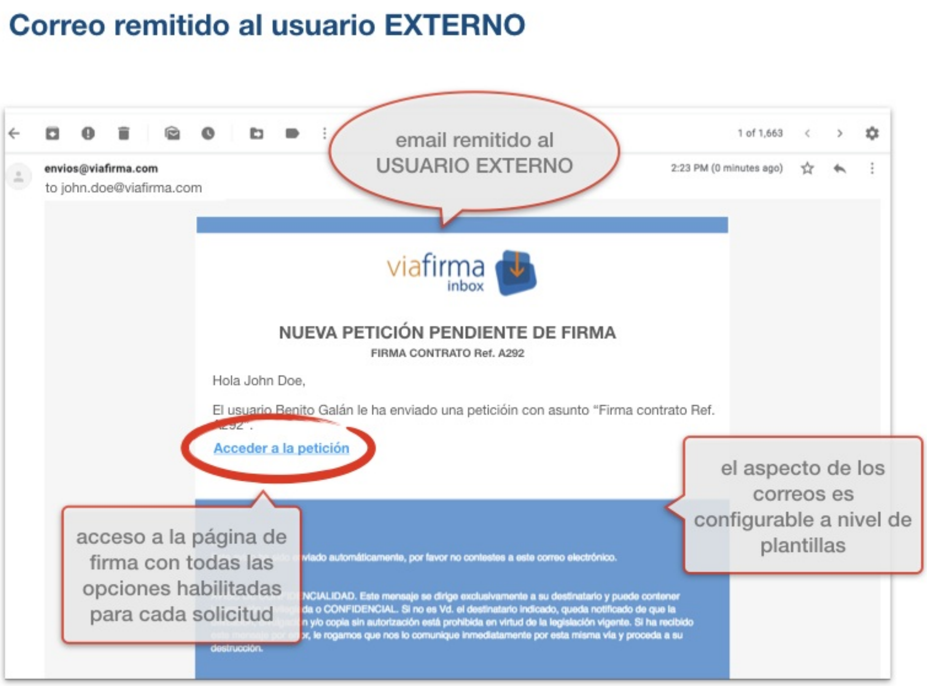
This section is OPTIONAL and you will only view it if the allowed signature mechanisms for this external user include "Web Signature or Biometric Signature".



Mail sent to external user

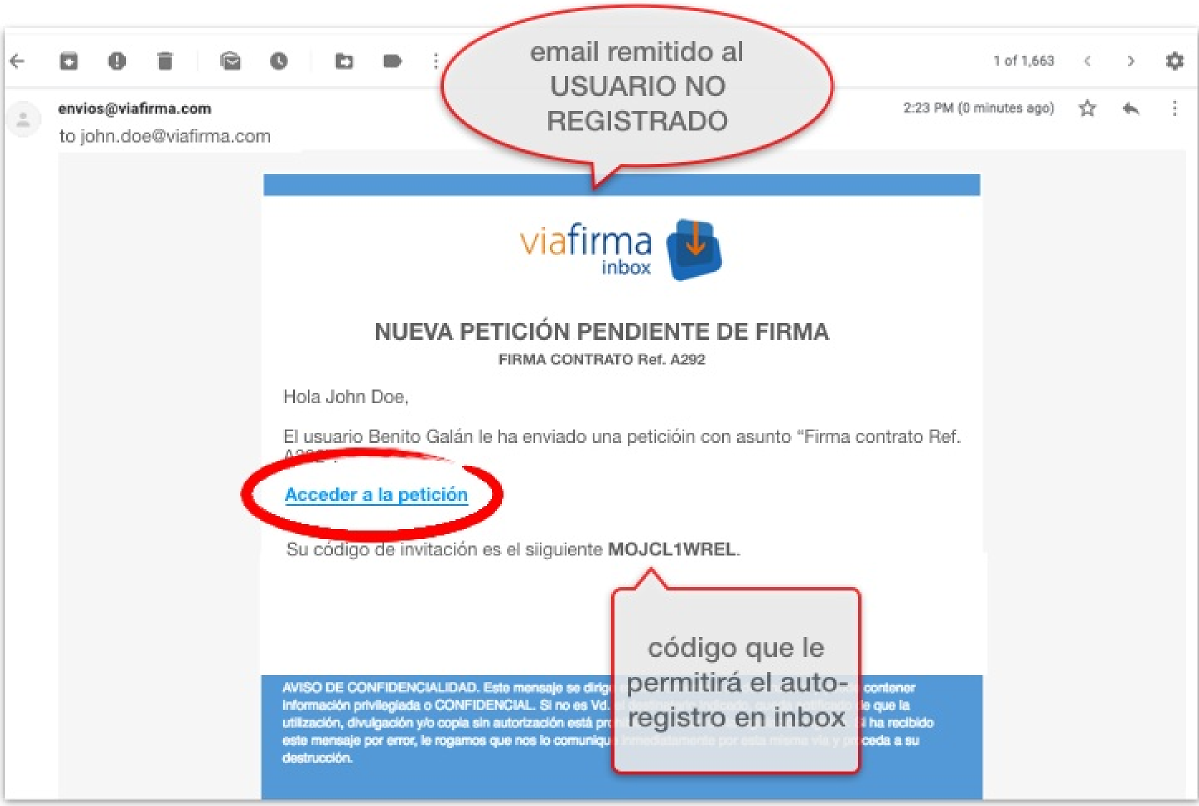
External user

If the global configuration of inbox defines that non-registered users will be considered as **external users**, and once the request has been completed and sent, the external user will receive an email inviting him/her to access a **SIGN PAGE**, where we will show information about the request, the link to download the document or documents to be signed, and the different signature mechanisms available depending on the request configuration.

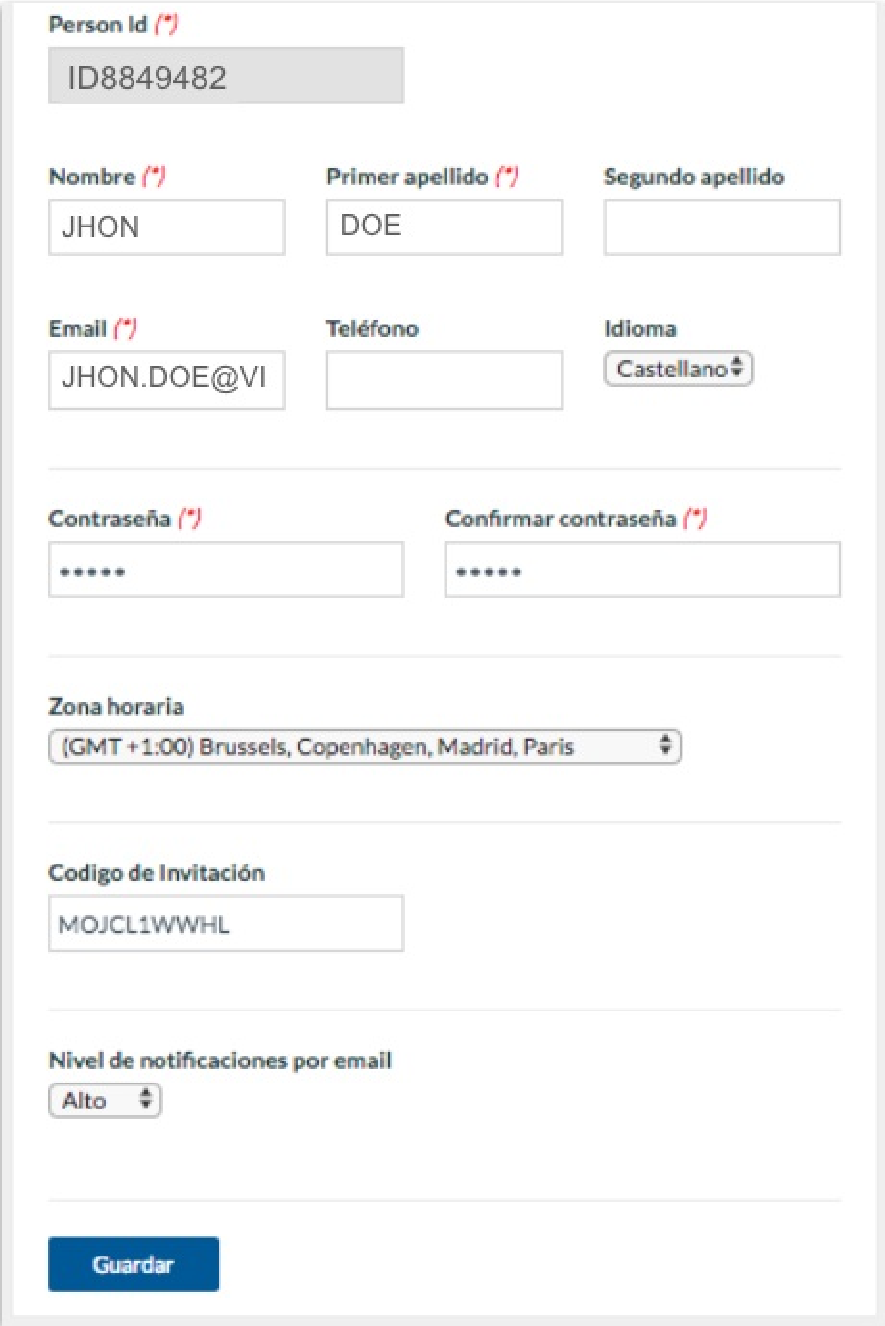


Users invited to self-register

If the option for **self-registration** of unregistered users has been defined in the global inbox settings, the email you will receive will include a **link with an invitation** to register with your **digital certificate**.



In this case, the user is asked to fill in their personal data before accessing their inbox.

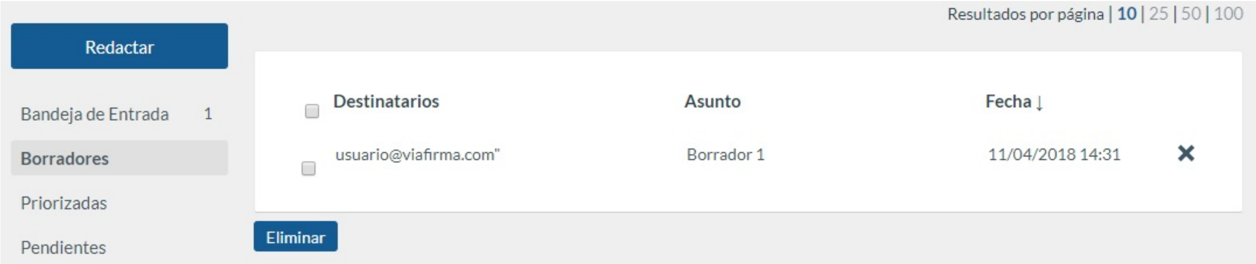


In chapter 7.5.1 Signing external users we explain all signing processes for these **external users**.

Drafts

While composing a request a draft is automatically saved. Therefore don't need to complete a request immediately and you can still recover the information later on.

To recover an existing draft you must access the **Drafts** section in the side menu and the list of drafts will be displayed.



When clicking a draft, the writing screen will be displayed with the data saved in the draft.

You can delete a draft from the list of drafts by clicking on the **X** or you can delete multiple drafts by selecting the drafts to be deleted and clicking on the **Delete** button.

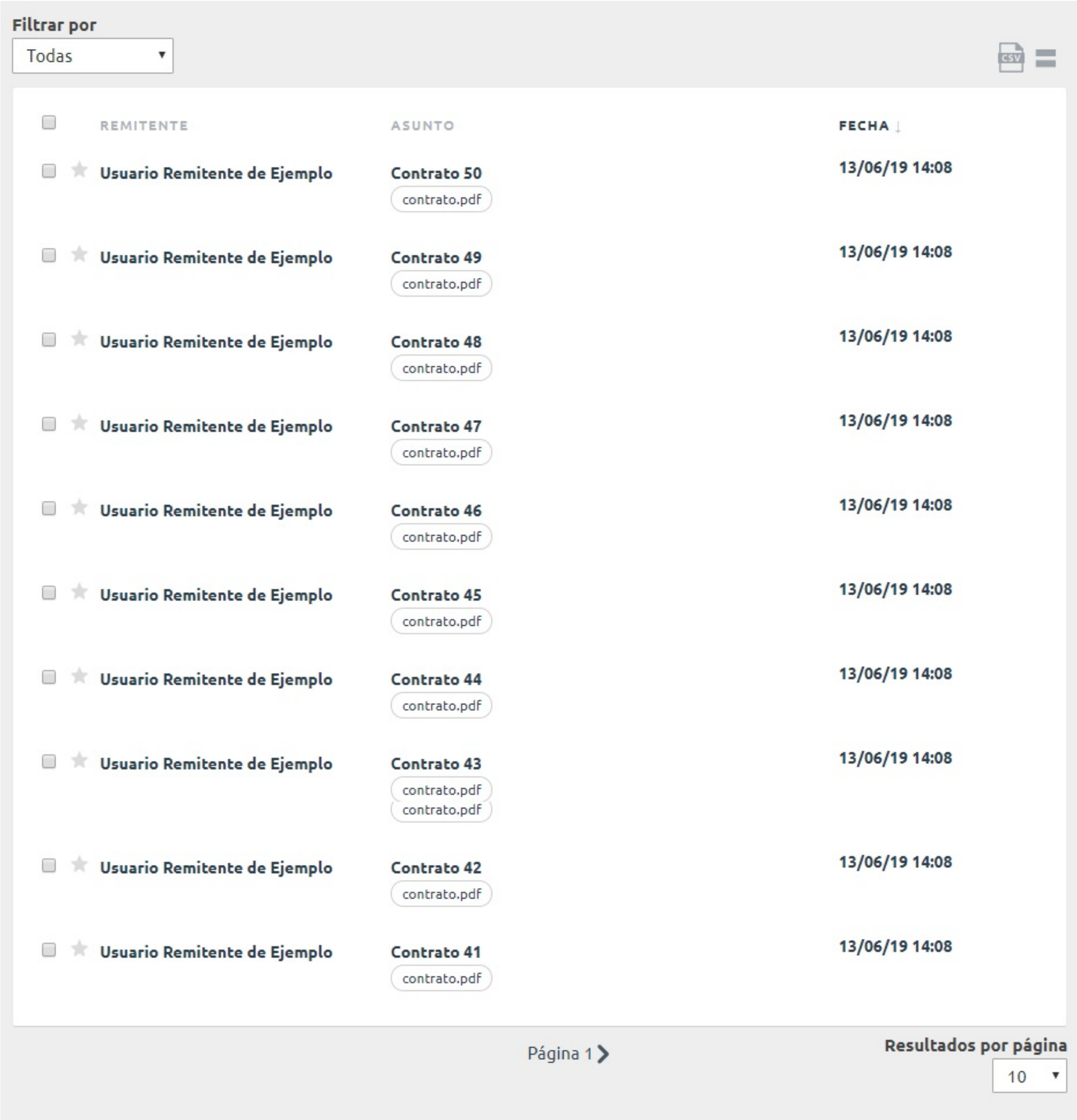
There is a cleaning process for obsolete drafts, therefore those which have not been checked in the last 30 days will be automatically deleted.

Working with a request

In this section we are going to see the different operations we can perform on a request.

List of requests

The request list shows three sections: the upper part contains the options section, the central part contains the request list and the lower part contains the pager.



Options

Available options:

- Filters: Users who have set filters will be able to choose the filters in the inbox to view the requests that meet the criteria.
- Signature, Approval and rejection: In lists where bulk signing is available when selecting one or more requests a button will be displayed to proceed with the signature or rejection.
- Cambiar a vista resumen.

- Cambiar a vista tabla.
- Export the list of requests in a csv file. The exported data are the sender, subject, date, status and request identifier.
- Export to pdf the requests of the current page. Only available in summary view mode.
- Download signed documents from completed requests from the request list in the advanced search.

List

There are two request listing views: table view and summary view.

The **table view** shows the basic data of the request (sender, subject, date and documents for signature depending on the instance settings). For those instances where the documents are configured to be displayed, they are available for download when clicking on the name of the document. Access the request details clicking on any of the request details.

In the **summary view**, the recipients of the request and the message will be displayed in addition to the above. When clicking on the name of a document it will be downloaded.. Access the request details pressing any of the request details

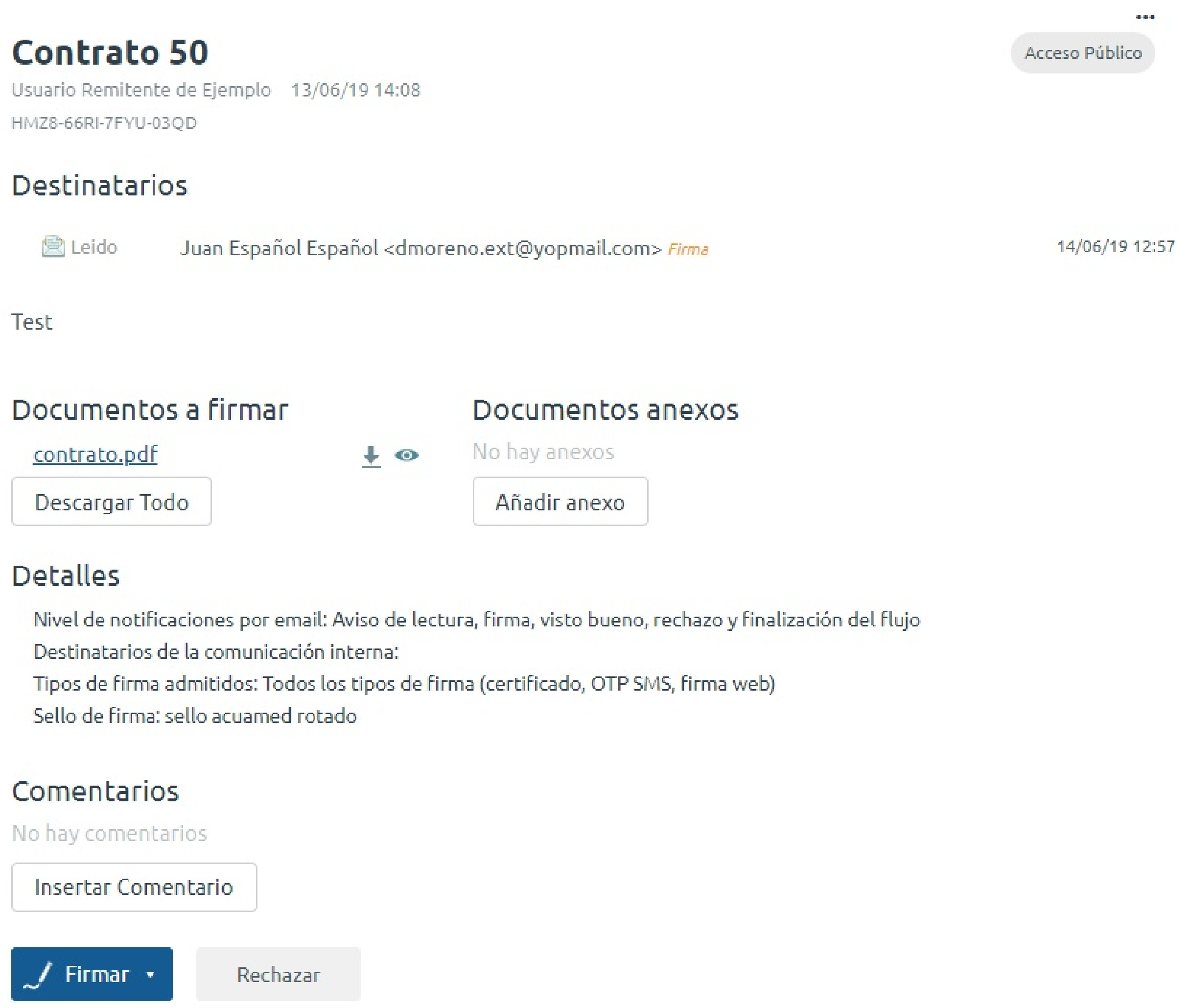
In both types of list, requests can be prioritized / de-prioritized by clicking on the ***star*** icon.

Pager

The pager is visible at the bottom of the list, allowing you to switch to the previous or next page if there is one. You can also change the number of viewable results per page.

Request details

When clicking on a request in any of the existing lists (inbox, requestessent, pending, on hold, rejected, etc.), the request details are displayed.



The following information is displayed in the detail page of a request:

- **Subject, date and sender** of the request. **Access type** public access to the request in the URL (permalink) with the CSV (Secure Verification Code).
- **Expiry date** (if any).
- **Signature workflow/approval**: shows the recipients of the different signature lines, the most current status for each of the users, and the last status update date. The signature hierarchy is a tree based workflow to indicate the order in which each user must perform his or her action. An icon is displayed on each signature line showing the status of the request for that user. Estos estados son:

Si posicionamos el cursor del ratón sobre los estados ***Firmado*** o ***Visto Bueno*** podremos ver el detalle acerca de dicha acción (siempre que un ***administrador global*** haya habilitado dicha opción en la ***configuración general*** del sistema).

- **Message** of the request added by the creator.
- **Signable Documents** and attachments, available for downloading clicking on the file name, for preview (when they are PDF or xml, clicking on the ***eye***), or for downloading all of them (in a ZIP file). ***Attachments**: during the lifecycle of the request, participants are allowed to add an attachment to the request to be used as an explanatory document for the rest of the users.
- **Comments**: comments inserted by other users can be read and new comments can be inserted. Permanent link**: link to access the request from outside the application (with the security settings assigned by the creator of the request).
- **Signature/approval**: If the user has the request in his inbox, the signature or approval button will be displayed based on the action defined for the user. See Sign a request y Approve a request
- **Reject**: allows a user to return the request providing a reason for rejection. See Reject a request
- **Actions (...)**: drop-down list with the available actions for the user. See Actions section on this page.

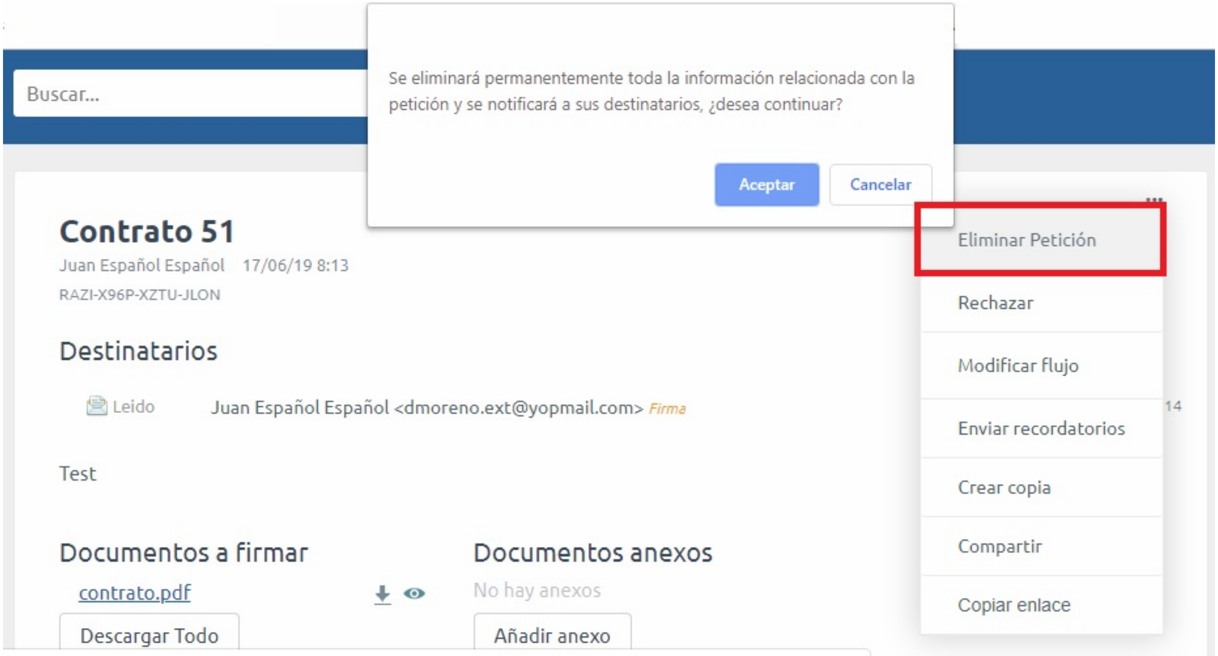
NOTE: Sometimes when opening a signed PDF document with Acrobat Reader, you will get an error message that says " At least one signature has problems". This is not a major problem, and can be solved by configuring Acrobat Reader. To do so, please follow the instructions of the document Adobe Reader - Managing trusted certificates.

Actions

List of actions available for the user on the request. The available actions will depend on the status of the request and user's role.

- **Reactivate**: Expired requests can be reactivated by the sender of the request. To do so, a new expiration date must be selected.

- **Delete request**: The sender can delete the request if no action has been completed by recipients (signature, approval or rejection). Once a request has been deleted, a notification will be sent to all recipients to inform that the request has been deleted.



- **Reject**: Reject request. See Reject a request
- **Edit workflow**: Edit signature workflow of a request. See Modificar el flujo de una petición
- **Send reminders**: An email is sent to each of the users who are able to sign or approve the request alerting them that they can take action.
- **Create copy**: Access to the drafting page with preloaded request data.
- **Compartir**: Sending email with public link of the request to the email addresses provided by the user (useful if "public" or "username/password" has been set as access option).

- **Archive /Unarchive**: See Archive a finished request
- **Copy link**: Copy the public link of the request to clipboard.

Signing a request

Signing a request is very simple; all you have to do is click on the link below. The types of signature to be used will depend on the configuration defined by the system administrators. These can be the following:

- **Signature with local certificate**: using **viafirma platform**. You can find the documentation here. **Signing with cloud certificate**: using **viafirma fortress**. Please find the documentation here.
- **SMS OTP Signature**: this operation will send an SMS shortcode to your cell phone. This code will then be inserted in the form that will appear on the screen for signing the request.
- **Digitized signature**: using **viafirma platform**. Please find the documentation here

In case there is a temporary problem with the availability of the platform, the system may report such error; in case it happens, please contact the platform administrator.

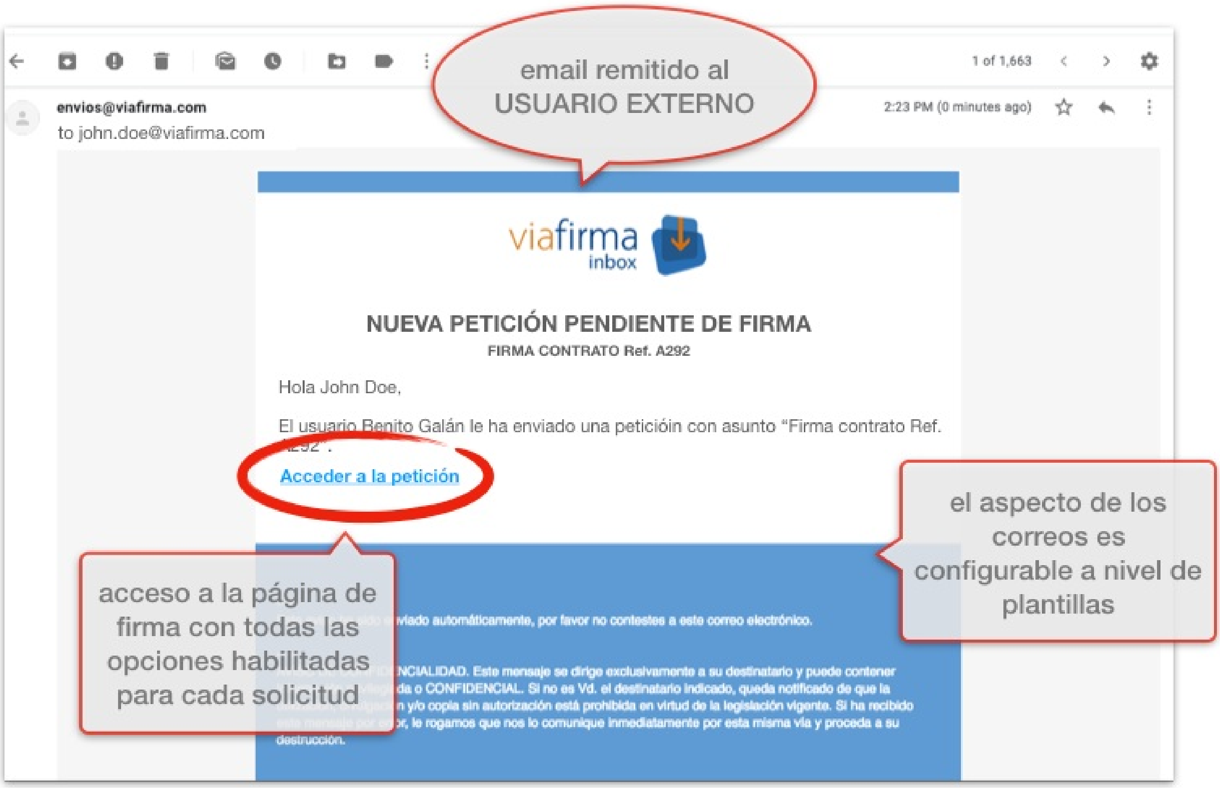
In addition, if you have several requests in your inbox or after performing an advanced search, you can select all the requests to be electronically signed in a single operation. We recommend knowing first what you are signing (e.g., because it has been previously approved by a trusted person).

External user signature

```
Last update: December 5th, 2018
```

When the document must be signed by an external user, viafirma inbox sends an email to the user inviting him/her to access a sign page where they can review the document and choose one of the signature options available for each case.

Mail sent to external user

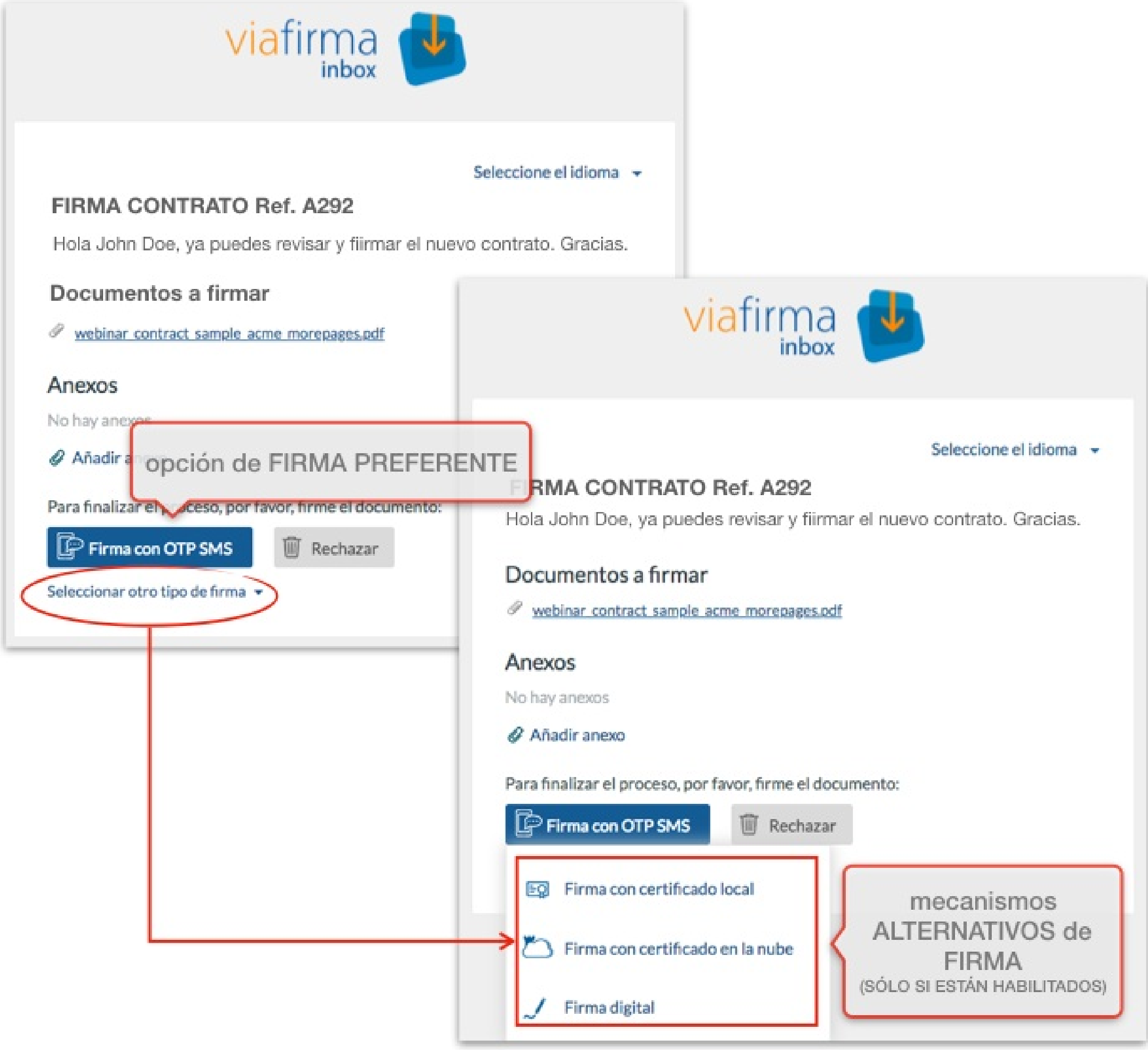


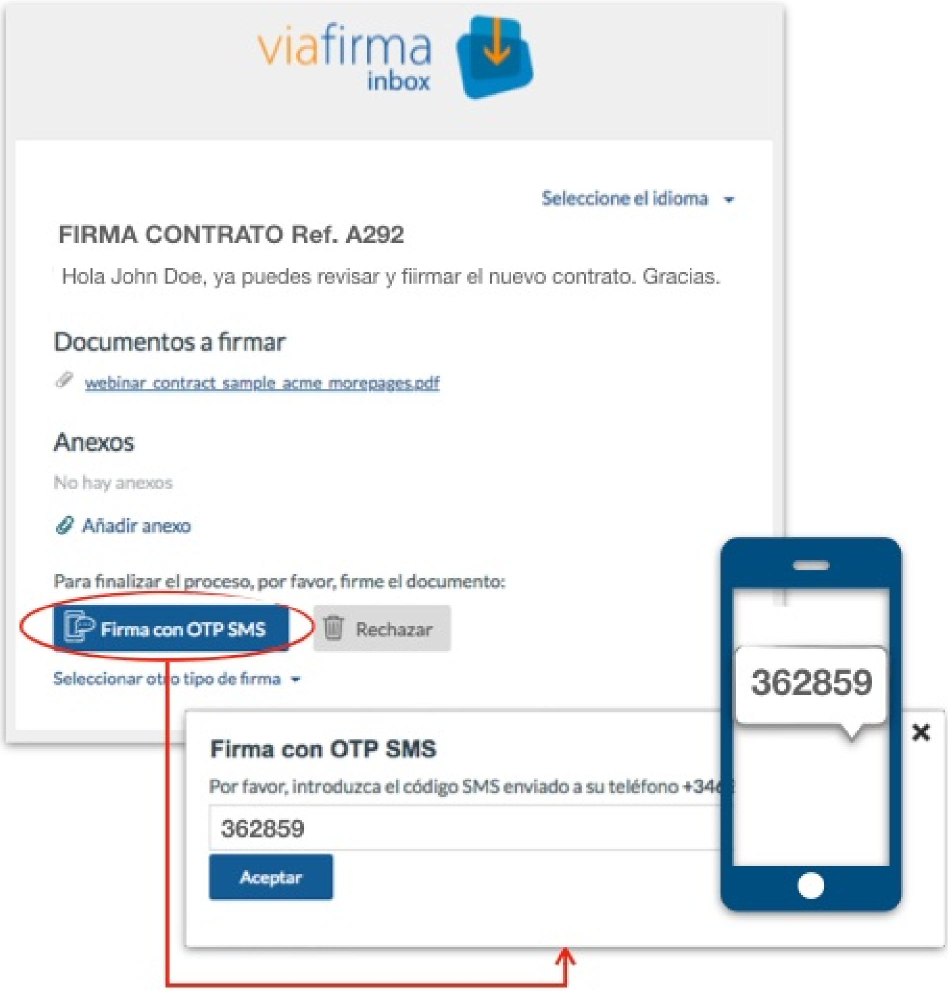
Signature options for external users

An external user may choose between the following signature options, depending on the signature request settings:

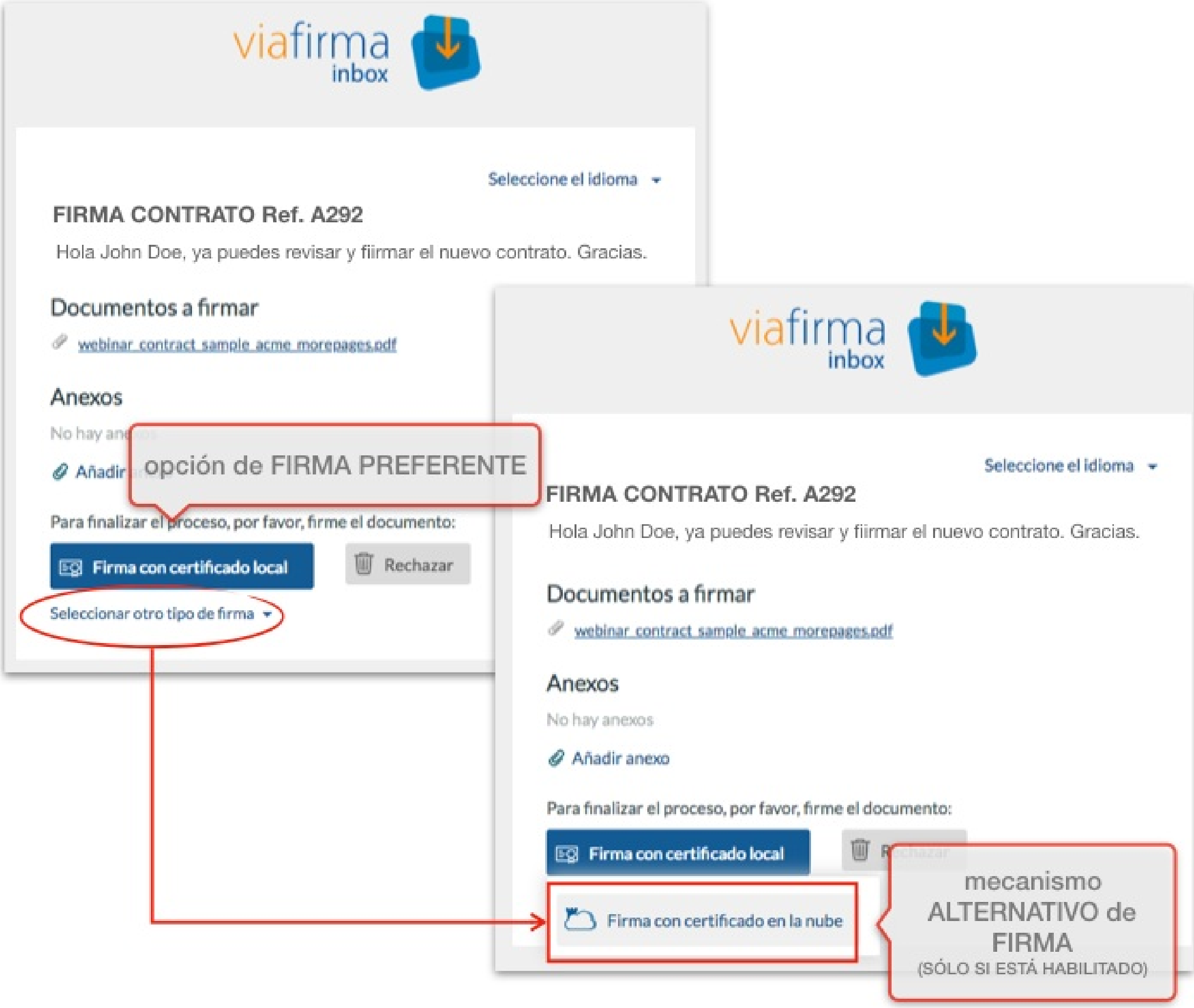
- SMS/OTP Signature
- Digital Certificate signature
- Centralized digital certificate signature
- Handwritten eSignature

SMS OTP signature


viafirma inbox
Seleccione el idioma
FIRMA CONTRATO Ref. A292
Hola John Doe, ya puedes revisar y fiirmar el nuevo contrato. Gracias.
Documentos a firmar
webinar_contract_sample_acme_morepages.pdf
Anexos
No hay anexos
Añadir anexo
Para finalizar el proceso, por favor, firme el documento:
Firma con OTP SMS
Rechazar
Seleccionar otro tipo de firma
opción de FIRMA PREFERENTE
Firma con certificado local
Firma con certificado en la nube
Firma digital
mecanismos ALTERNATIVOS de FIRMA
(SÓLO SI ESTÁN HABILITADOS)



Digital Certificate signature


viafirma inbox
Seleccione el idioma
FIRMA CONTRATO Ref. A292
Hola John Doe, ya puedes revisar y fiirmar el nuevo contrato. Gracias.
Documentos a firmar
webinar_contract_sample_acme_morepages.pdf
Anexos
opción de FIRMA PREFERENTE
Para finalizar el proceso, por favor, firme el documento:
Firma con certificado local
Rechazar
Seleccionar otro tipo de firma
viafirma inbox
Seleccione el idioma
FIRMA CONTRATO Ref. A292
Hola John Doe, ya puedes revisar y fiirmar el nuevo contrato. Gracias.
Documentos a firmar
webinar_contract_sample_acme_morepages.pdf
Anexos
No hay anexos
Añadir anexo
Para finalizar el proceso, por favor, firme el documento:
Firma con certificado local
Firma con certificado en la nube
mecanismo ALTERNATIVO de FIRMA
(SÓLO SI ESTÁ HABILITADO)

Centralized digital certificate signature

Handwritten eSiganture

Approval of a request

Approving a request is a very simple; click on the link available for this action. This will automatically change the request status and several participants will be notified of the change.

In addition, if you have several requests in your inbox or after performing an advanced search, you can select all the requests to be electronically signed in a single operation. We recommend knowing first what you are signing (e.g., because it has been previously approved by a trusted third party).

If the document to be approved is a pdf, and inbox version is 3.0.0.0 or later, the approval data is included in the pdf.

For approvals performed with Inbox 3.2.24 or later, the date and name of the person who performed the approval are included as personalized properties of the document. For versions 3.0.0 or later and lower than 3.2.24, the approval data is embedded as an xml attached to the pdf.

Reject a request

Requests in progress can be rejected by the sender of the request, by recipients who have the request in their inbox (not by recipients who completed their action or those who are on hold) or by an administrator.

Rejection by recipients

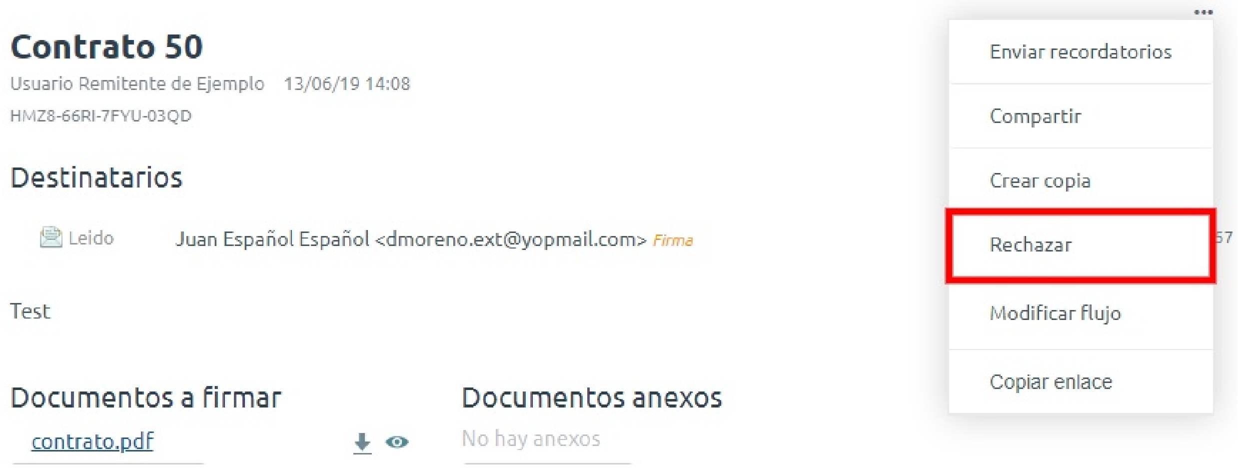
The recipients of a request can reject it **individually** or **in bulk**.

To reject them individually you must access the details of the request to be rejected and click on the **Reject** button.

Bulk rejection of requests is performed from the **Inbox** and **Advanced Search** screens. Click on the ***Reject*** button to select the requests you wish to reject.

Rejection by sender or administrator users

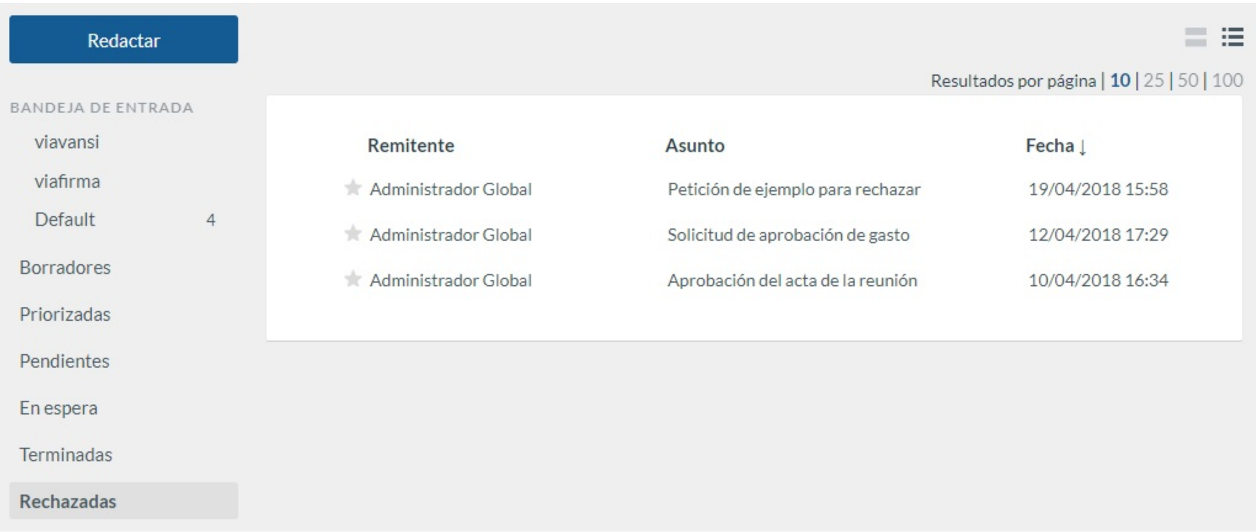
The sender and the administrator users can reject requests individually. To do this they must access the request details and in the action menu (...) they must select the ***Reject*** option.



Rejection Process

After pressing the **Reject** button, the screen to indicate the **reason for rejection** will be displayed.

Once specified the reason for rejection press the save button to change the request(s) to rejected status, notifying the corresponding user(s). To access the rejected requests, select the **Rejected** option in the side menu.

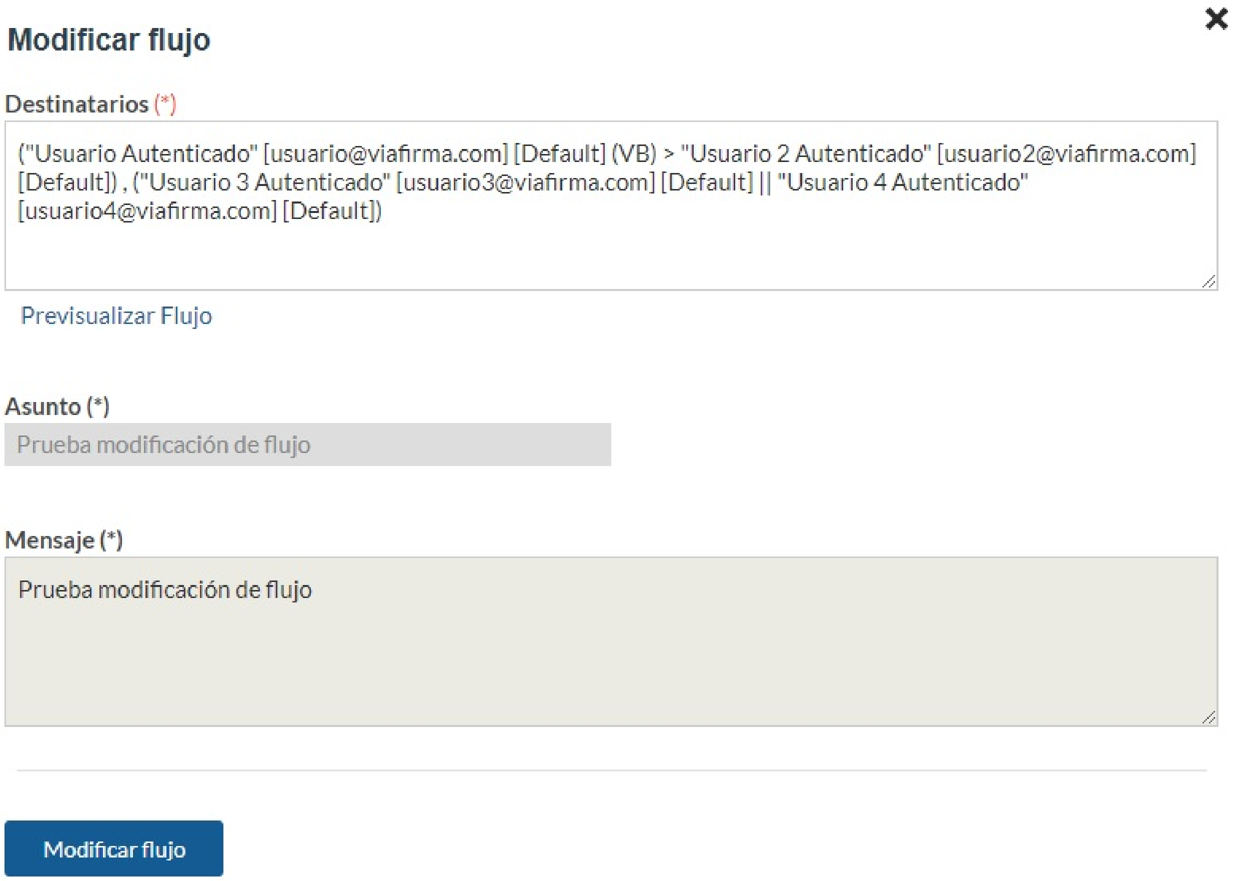


Modify the workflow of a request

The writer of a request can modify the worfklow of recipients clicking on the **Modify workflow** link in the top right drop-down menu; this link will only be displayed when the request is not completed, archived or rejected. Users who have already completed their action cannot be removed from the workflow, and the status of the request must be re-evaluated after the modification. For example, if there is a request with 4 signatories and 2 of them have already signed, the workflow is modified removing the 2 recipients who have not signed and saved. These 2 recipients can be deleted, and the request would then be considered completed.

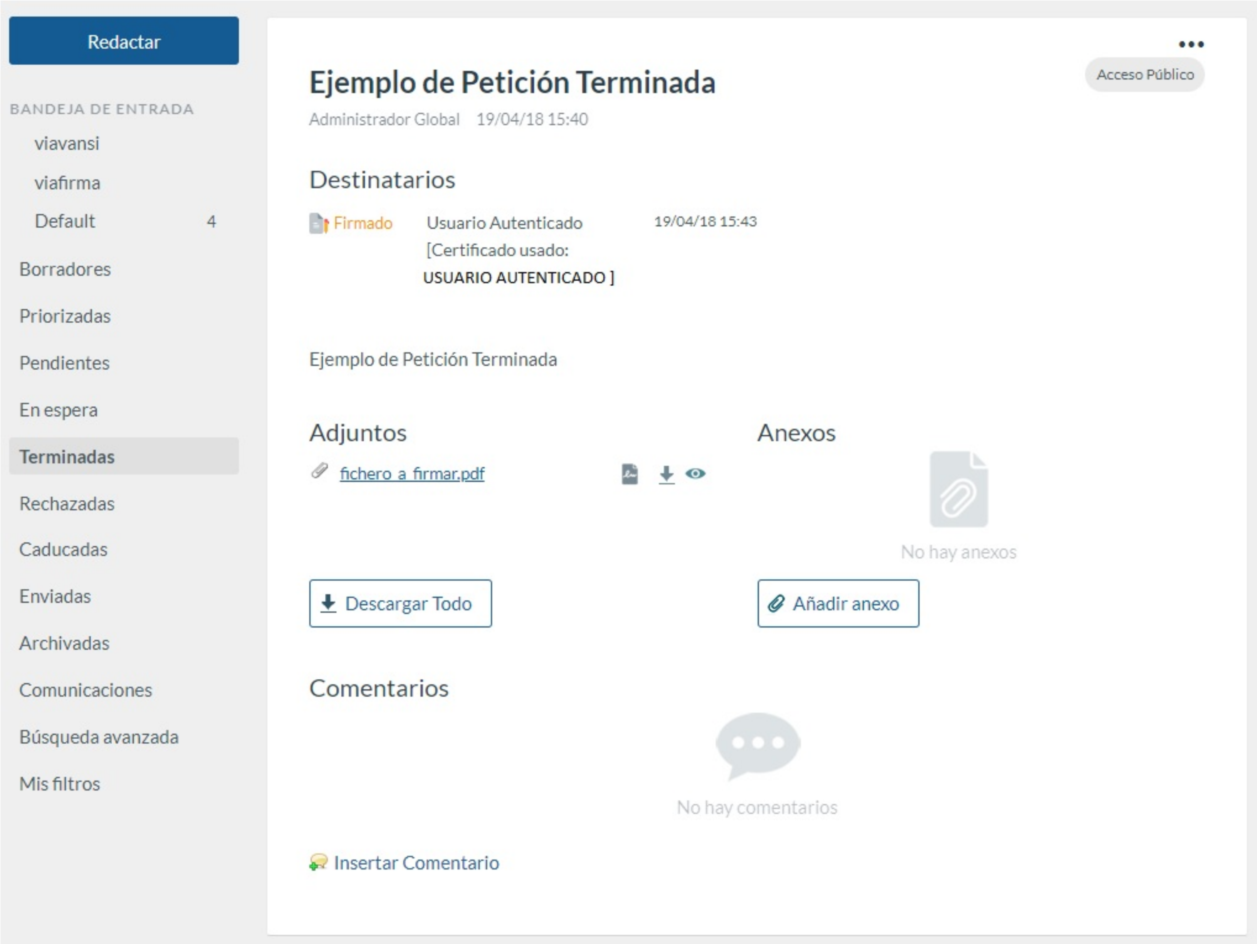
Once the request workflow has been modified, a notification will be sent to all recipients to inform them of the modification.

When clicking on this link, a popup window will open where recipients of the request can be modified as shown in the following figure:

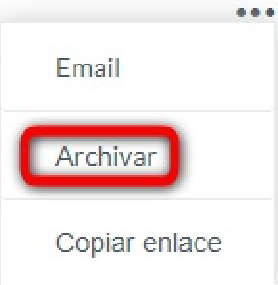


Archive finished request

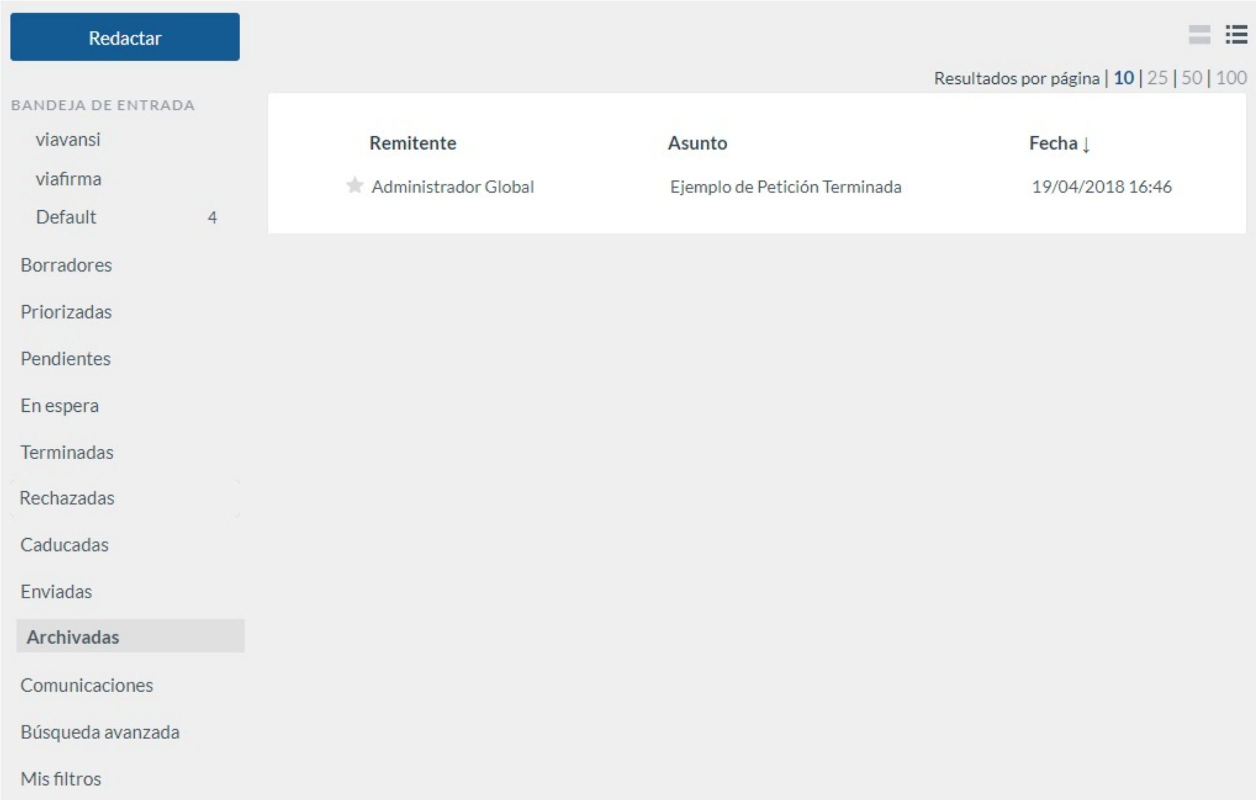
There is the option of archiving a completed request by accessing the details of the completed request.



In the detail of the request, click on the **File** button in the drop-down menu on the top right.



Alist of finished requests without an archived request will be displayed. Select the **Archived** option in the left side menu to access this archived request.


Redactar
Resultados por página | 10 | 25 | 50 | 100
BANDEJA DE ENTRADA
viavansi
viafirma
Default 4
Borradores
Priorizadas
Pendientes
En espera
Terminadas
Rechazadas
Caducadas
Enviadas
Archivadas
Comunicaciones
Búsqueda avanzada
Mis filtros
Remitente
Asunto
Fecha ↓
Administrador Global
Ejemplo de Petición Terminada
19/04/2018 16:46

Download signed documents

You can perform a bulk download of signed documents. This requires an advanced search to locate the requests whose documents are to be exported.

Once in the list of search results, the following icon will be displayed  . If we press it a screen will appear to inform us that the file is being generated and that we will receive an email to download it.

This will be a zip file with all the documents separated in folders where each folder will be the identifier of the request. It also includes a csv file with the data of the requests to which the files belong.

Only files from requests that have been successfully completed will be included. Rejected, expired or unfinished requests are not included.

Once the email has been received, click on ***Download signed documents*** to access the download screen. You must be logged in viafirma inbox with the same account you used when making the request in order to download the document. In case of not being previously authenticated, we will be forwarded to the authentication screen.


viafirma
Hola Juan Español Español,
Hemos recibido una solicitud de descarga de documentos firmados.
Puede descargar los documentos en el siguiente enlace:
Descargar documentos firmados
Por motivos de seguridad, el enlace tiene una validez de 7 días.
viafirma inbox
A continuación, puedes descargar los documentos de tu búsqueda:
Descargar documentos

Custom workflows

The **Workflow** option in the personal menu allows you to edit your signature workflow. This section allows the user to manage his own signature workflows and reuse them later in the ***Recipients*** box which appears in the **Compose** menu.

First, there is a list with all the workflows created by the user allowing to:

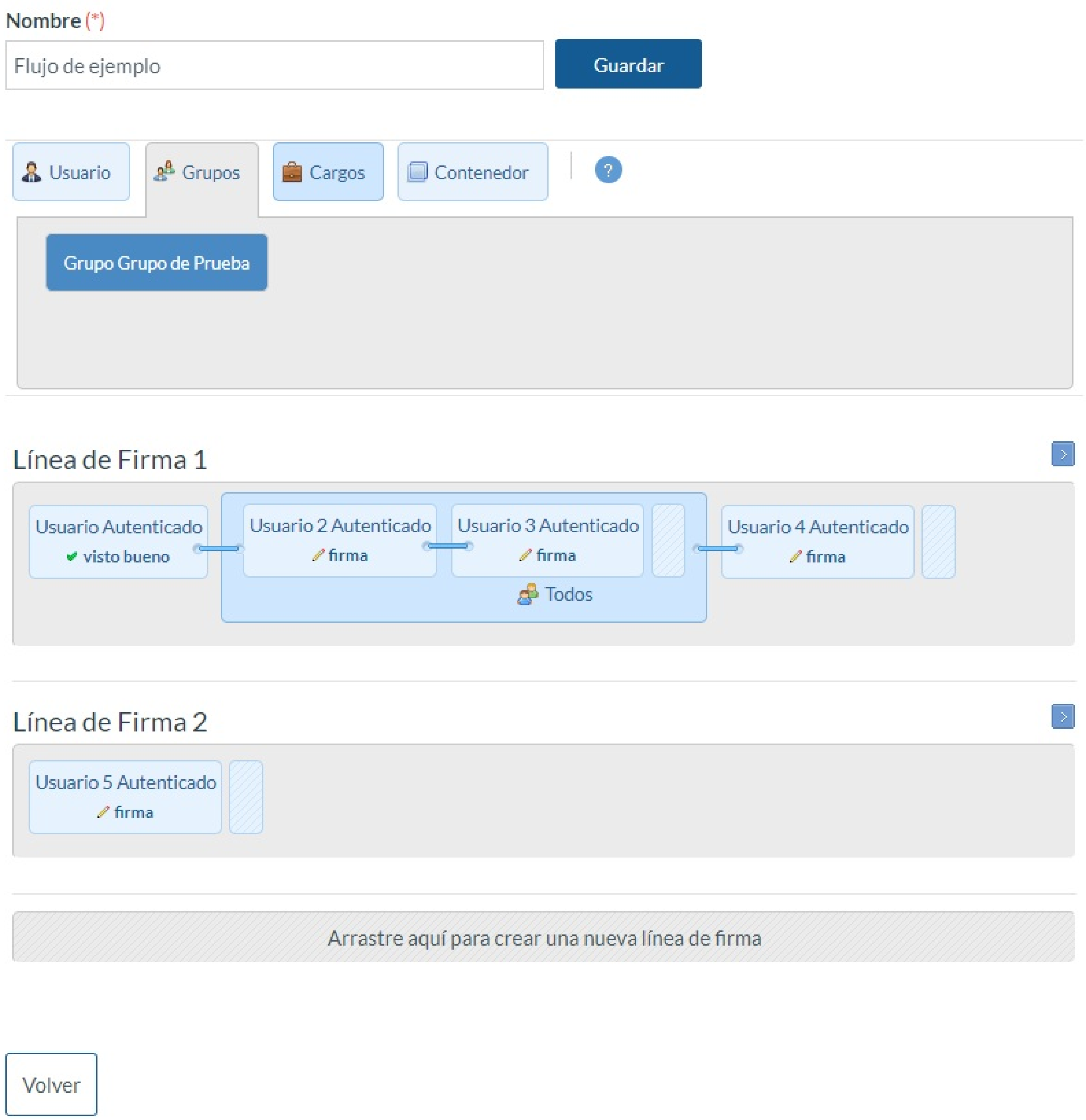
- Filter workflows using a search string.
- Edit existing workflows
- Delete existing workflows
- Add new workflows

The workflow designer is opened when editing an existing workflow, creating a new one, or using the **Save workflow** option below the **Recipients** box when composing a request.

Workflow designer

Asignature workflow is defined by its name and the signature lines which establish the order in which the recipients of a request should eSign. When creating signature lines, two main areas can be distinguished in the designer: the element selection area and the signature line area. To design a signature workflow, the user must drag elements from the element selection zone to:

- The end of a container.
- The end of an existing signature line.
- The area to create a new signature line.



Each element that composes a signature line represents a user, or a group of users. The following are available:

- **Users**: Add a user to the signature line. When you drag and drop this element, a pop-up window will appear where you can select the user you want to add.
- **Groups**: By clicking on this option, you will see the groups that can be dragged to a signature line. When writing a

request, each group is replaced by the users which belong to that group. The users of the selected group will perform the action in parallel.

- **Job tile**: this option will display all the job positions that can be dragged to a signature line. When writing a request, each job position is replaced by the users from that job position. The users of the selected job title will perform the action in parallel.
- **Container**: adds one or more containers to the signature line. There are two ways: all elements inside this container perform the selected action in parallel (All) or only one of the users performs the action(Only one).

The default action to be performed for recipients included in a signature line is **SIGNATURE**. To change this action to **APPROVAL** simply click on the signature link or vice versa.

To remove an element from a signature line, simply drag it to the designated area (this area is displayed) It is also possible to delete the entire signature line by clicking on the **X** icon in the upper right corner.

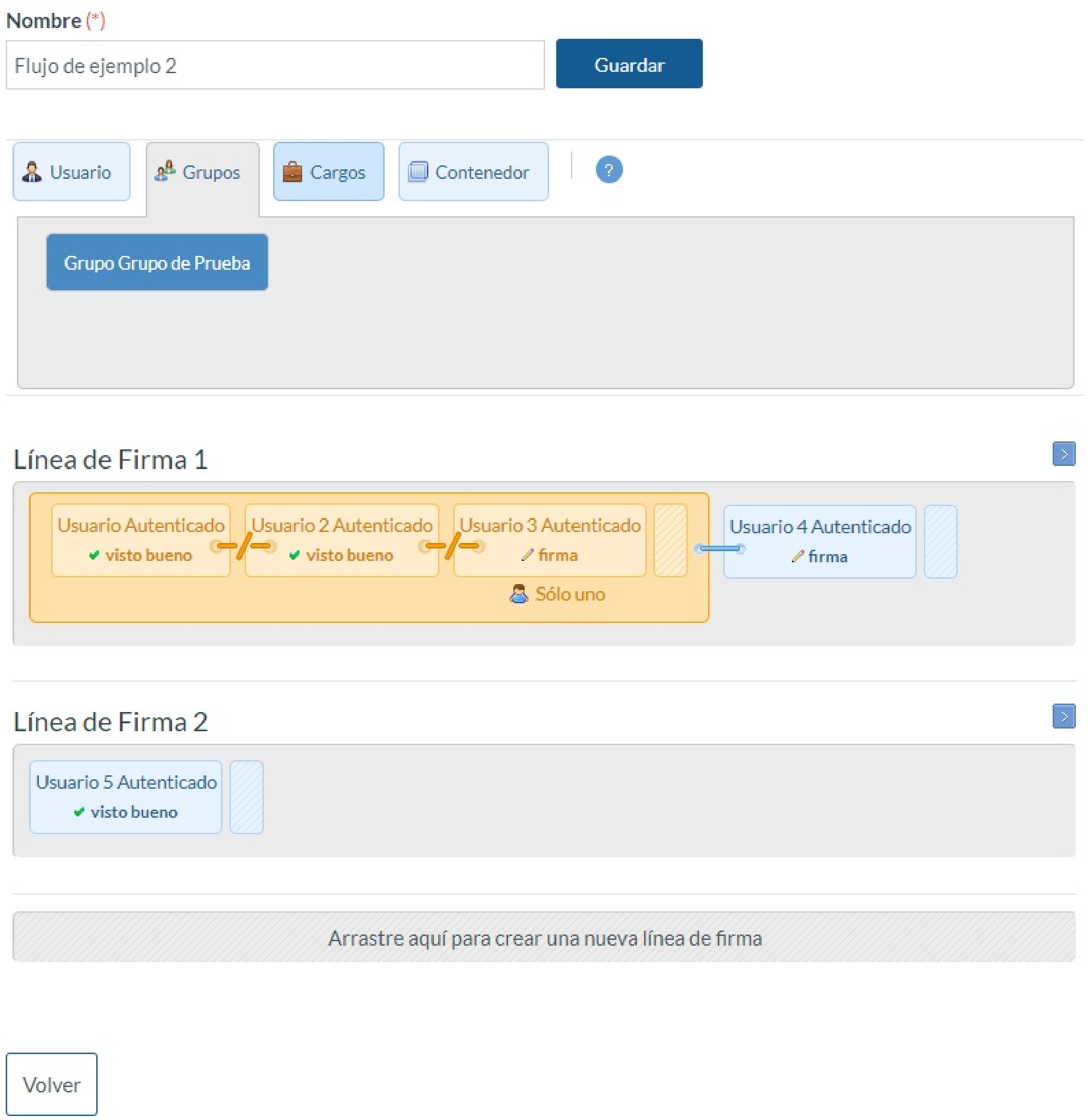
When including a signature workflow in a request, the recipients field will be composed as follows:

- Between each element of the line the greater-than symbol **>** will be added or the **||** (OR) if you want to specify that it is required that only one of the recipients performs the action.
- Between two different signature lines, a comma **,** is added. *Containers, groups and positions will be replaced by users comma-separated **,** and in brackets *()*, unless the element is already inside a container, in which case the brackets will be ignored.

As mentioned in the previous section, you can define workflows where only one of the recipients in the container performs the action, disabling any other actions performed by the rest of the users of that container. In other words, only one of the members of the container needs to perform the action.

Below we show an example of a workflow where only one of the components of the container needs to perform the action for the rest of the senders of the line to be able to perform their corresponding actions.

Note the color change in the container.


Nombre (*)
Flujo de ejemplo 2
Guardar
Usuario
Grupos
Cargos
Contenedor
?
Grupo Grupo de Prueba
Línea de Firma 1
Usuario Autenticado
visto bueno
Usuario 2 Autenticado
visto bueno
Usuario 3 Autenticado
firma
Sólo uno
Usuario 4 Autenticado
firma
Línea de Firma 2
Usuario 5 Autenticado
visto bueno
Arrastre aquí para crear una nueva línea de firma
Volver

Signature delegation

Sometimes an organization needs to have a signature delegation mechanism from one user to another (absence of availability, leaves, holidays, etc.). Viafirma Inbox has a signature delegation feature, allowing 3 levels of delegation:

- **Collaborator**. If a user X delegates to another user Y with Collaborator permissions, the user Y will be able to access the Inbox with all requests from X. He/she will be able to sort the requests, insert comments, create tags, prioritize or de-prioritize, etc., but will not be able to approve or sign on behalf of the other user.
- **Approval". The delegated user Y has the Collaborator permissions, but can also approve on behalf of user X.
- **Signature**. User Y can also eSign on behalf of user X.

Under no circumstances may delegated users create requests on behalf of the delegating user.

Create a signature delegation

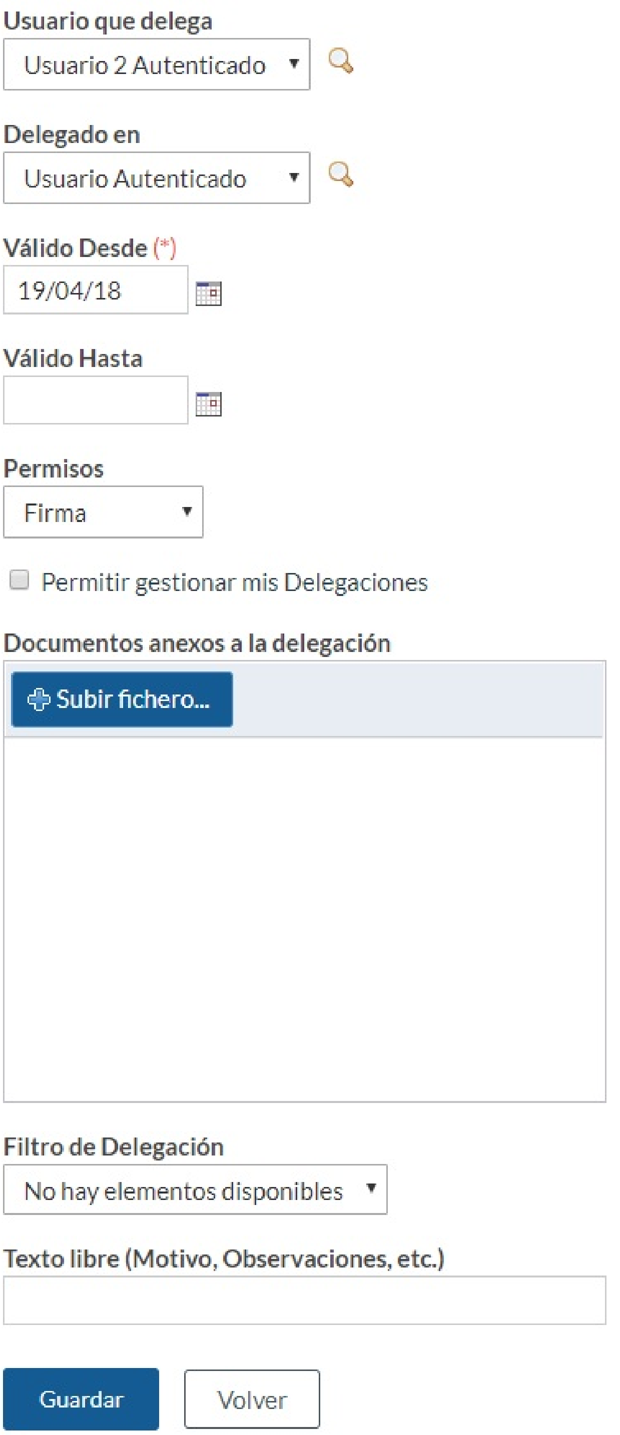
To create a delegation, click on the **Delegations** menu located in the **Personal Menu** (upper right-hand side of the screen):

.

There are 3 options:

- **Sent**: delegations that we have created delegating to other users. Received**: delegations by other users who delegate to us.
- **Deleted**: delegation history.

To create a new request, click on the **Add delegation** option.



In this form we can fill in the following information:

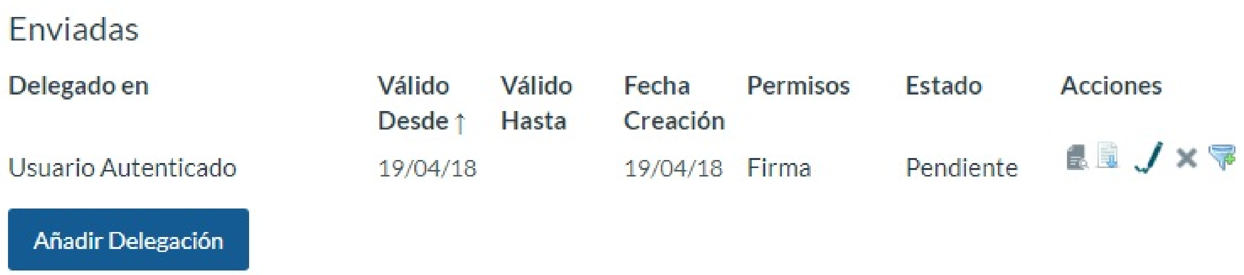
- **Delegate to**: we will choose the user we want to delegate to. We can select it from the drop-down list, or click on the magnifying glass to search for the user in a window (useful for organizations with many users, where searching for someone specific in a drop-down list can be cumbersome).
- **Valid From**: start date of the delegation (it is considered active from 00:00 of the chosen day).
- **Valid To**: delegation end date. (ends at 00:00 hours of the selected day). This is an optional field; if left blank, the delegation does not expire (unless the user who created it removes this).
- **Permissions**: permissions level, according to the explanation given in the previous section.
- **Allow to manage my delegations**: allows the delegated user to manage our delegations.
- **Documents attached to the delegation**: Allows to attach documents that support the delegation, such as minutes,

resolutions, etc.

- **Delegation filter**: The possibility of applying one of the defined filters to the delegations, so that the delegating user will only have access to the requests from the filter associated to the delegation.
- **Free text**: Optional, allows adding a free text to the delegation, such as the reason for delegating or other comments. If filled in, this free text will appear in the signature box of the document.

Depending on the settings chosen by the administrators, the delegation can become effective immediately after it is saved, or, as it is more common, it could require the signature by both participants of a PDF document automatically generated by the system, which contains key information about this delegation of the signature.

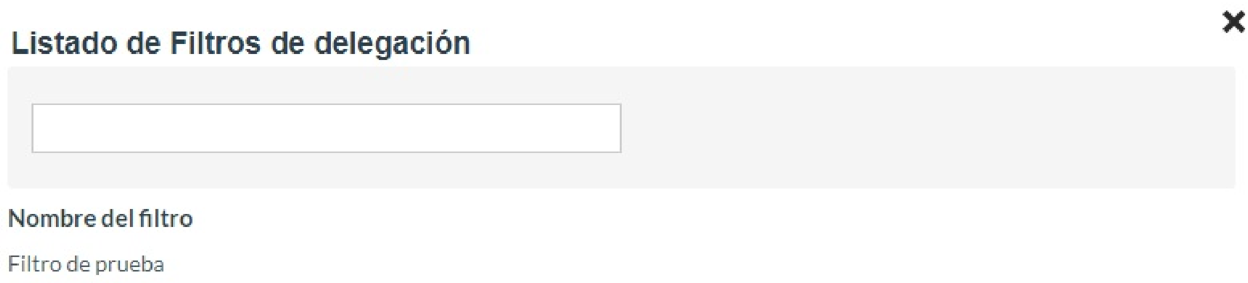
The delegation will be automatically sent by email to both participants when the delegation is created, and will remain in pending status (not active) until both signatures are completed:



.

The actions that can be performed on the delegations are:

- Access to request details.
- Download the delegation document.
- sign the delegation document, and when both signatures are in place the delegation is active.
- Delete the delegation. It is added to the list of deleted requests.
- A previously designed filter is associated to the current delegation (in case it has not been chosen during the creation of the delegation). Thus, if a filter is applied, the user to which it has been delegated will only see the requests that comply with the established filter. In this case, a pop-up window will open with all the delegation filters created by the user to choose which one to apply to the current delegation.

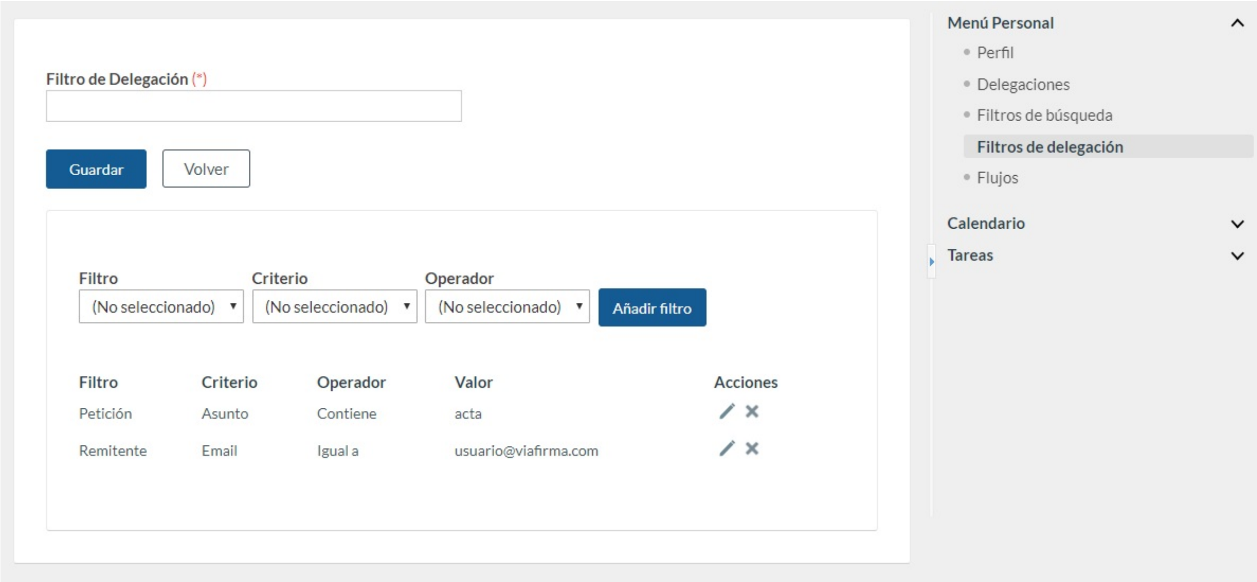


- Disable delegation filter.

Depending on the system configuration, when a request is signed by a delegated user, a signed delegation document will be automatically incorporated as an attachment to the request.

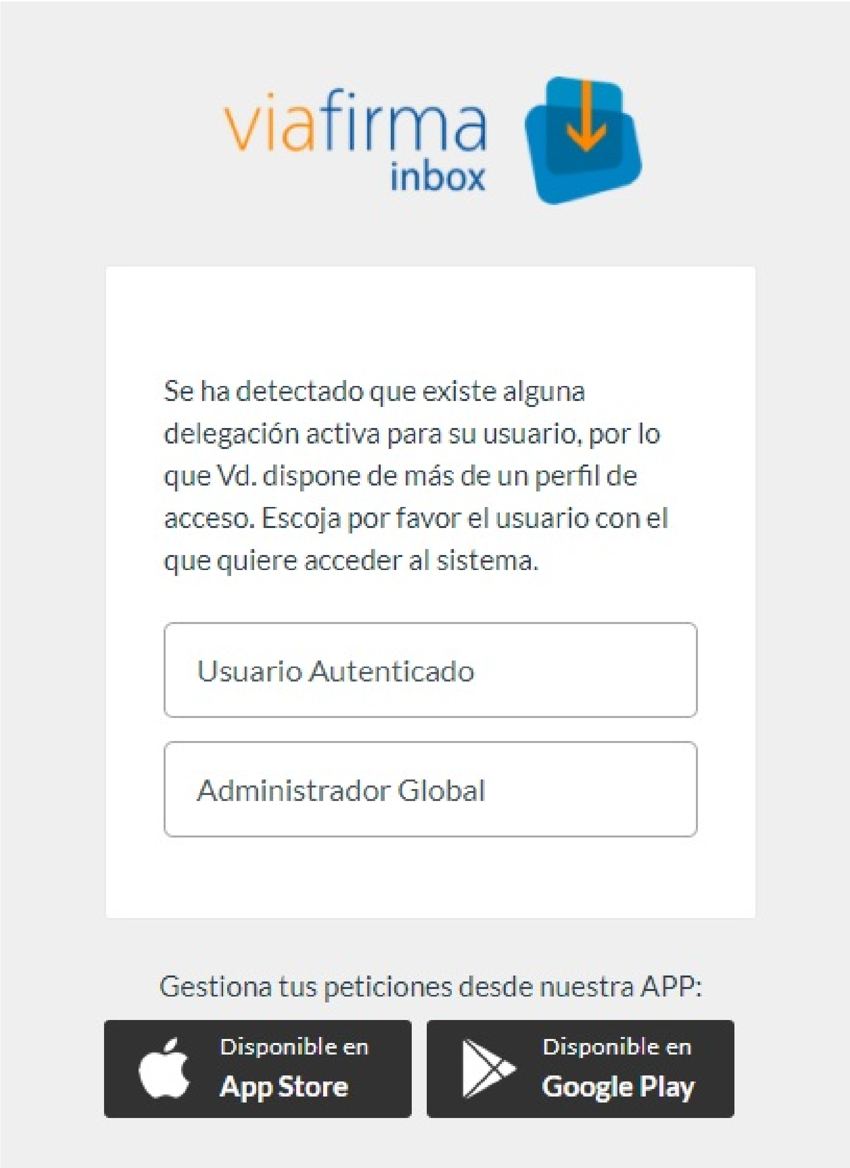
Delegation Filters

In the personal menu every user can create filters that can then be linked to their delegations so that the person to whom they delegate has access only to those requests that comply with the filter or restrictions created.



Acting as delegated user

When trying to access with your username/password or digital certificate, a delegated user will see the following picture:



In this case, when we access the platform we will have to choose which role to enter with: our own, or the role of the person or persons who delegated us.

If we click on someone else's role (accessing as delegates), we will see that the top menu includes further information than usual:

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Specifically, we can see the real name of the person who has accessed and the string "on behalf of" referring to the user who has delegated. In addition, a "Change user" option allows us to return to the previous user selection window.

Otherwise, the delegated user will use the software as they would use their own name; note that when a delegated user signs a request, this event is reflected in the detail of the request:

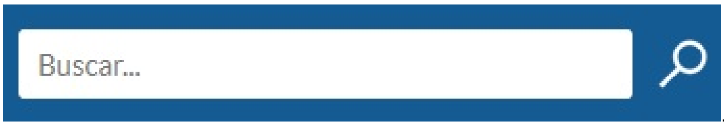
As you can see, the details of the request shows the official signatory and the actual signatory who has electronically signed through delegation. In addition, in the event that the delegation required the signature of a document by both parties, the signed delegation document would be automatically incorporated as an attachment.

Search

There are two ways for searching requests: **simple search** and **advanced search**. We will now see how both work

Simple search

In the top menu we have a simple search box where we can search by entering a string:



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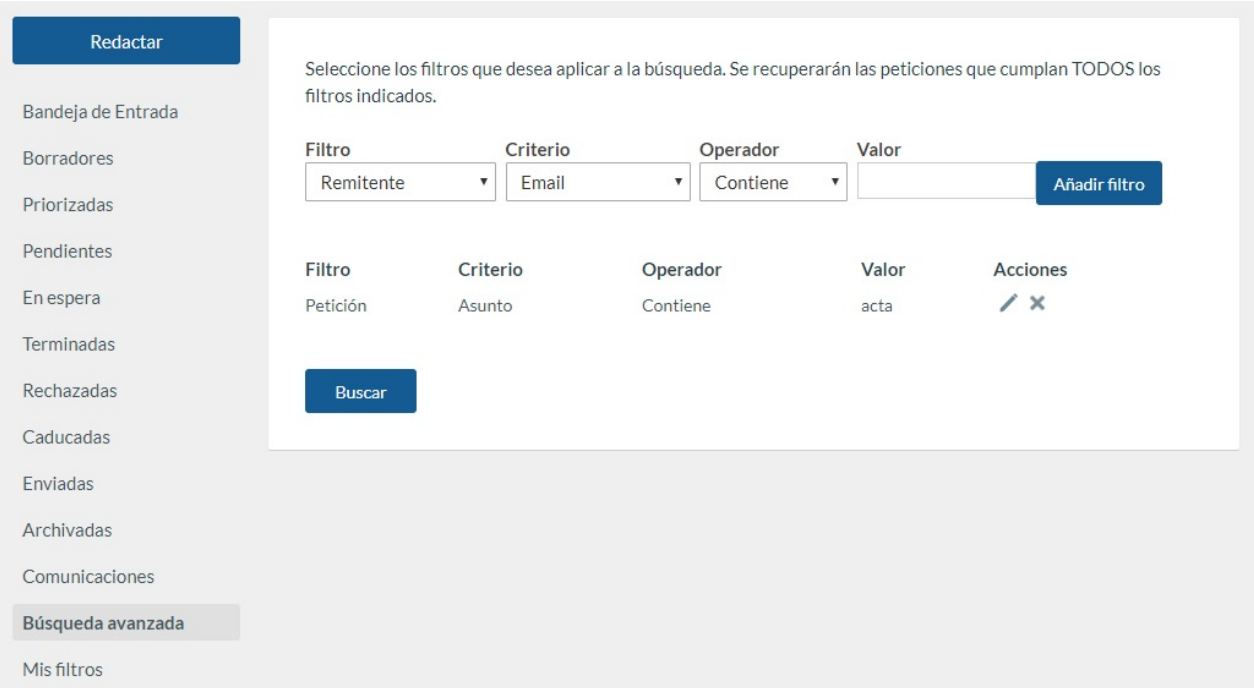
The system searches for requests that match the entered string and displays them as a search result. Specifically, the system tries to search for matches with the subject and message of the request, and the name of the sender of the request.

However, sometimes we need to perform more complex searches; to do so, on the left side menu we have the **Advanced Search** option.

Advanced search

The advanced search system is based on the combination of filters on different aspects of a request:



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Namely, a combination of **filter / criterion / operator / value** is performed. The type of ***filters*** are:

- **Request** (generic request data): with criteria such as Subject, Message, Reference, Creation Date, Expiration Date, Status, Prioritized, Secure Verification Code or Archived.
- **Sender**: such as Person Id (NIF, etc.), First Name, Last Name, Phone, Email or Entity.
- **Recipient**: similar to sender's selection criteria.
- **Metadata**: using parameters like Name, Value or Value_Name parameters.
- **Documents**: with criteria such as Name, Extension (pdf, txt, doc, etc.), size in bytes or Type (signable, attachment).

Depending on the type of filter/criteria, ***operators*** will be displayed and tailored to them. For example, if we choose the criterion "Size of a document", the operator will look for numerical operations ("Greater than", "Less than", etc.). With a string, the operator could be of the type "Contains", "Starts with", "Ends with", etc.

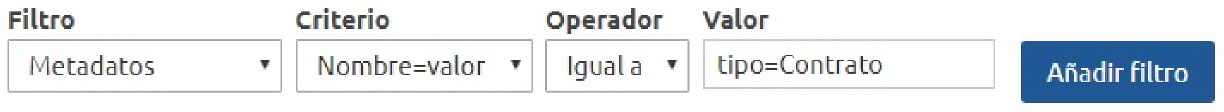
The system allows us to combine as many filters as we want, returning requests that match ***ALL*** filters. For example, we could perform a complex search like this: "locate all requests where the recipient's email contains the string 'gmail.com', the subject contains the word 'minutes', the message includes the word 'approve', the creation date is greater than 31/12/2010 and less than 01/06/2011, the file name includes the word "meeting", PDF type and size less than 1 MB, and also has a metadata name "file" and value "PR/2011/134".

In addition, if we were to perform the same search on a regular basis, we can store it for later reuse, as we will explain in the following section.

Search by metadata name=value

In order to filter requests that have a certain metadata with a certain value you must use the search filter Metadata / Name=value. In the search box enter the key linked to the metadata, then a "=" and the value of the metadata to be found.

Example, to search for requests that have the metadata *type* with the value *Contract*:


Filtro
Metadatos
Criterio
Nombre=valor
Operador
Igual a
Valor
tipo=Contrato
Añadir filtro

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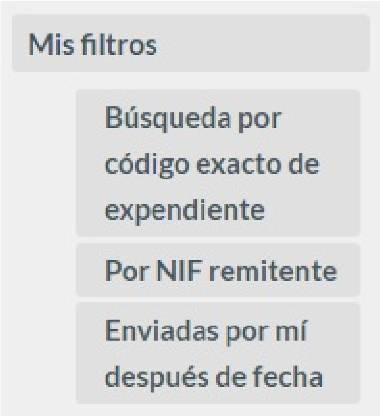
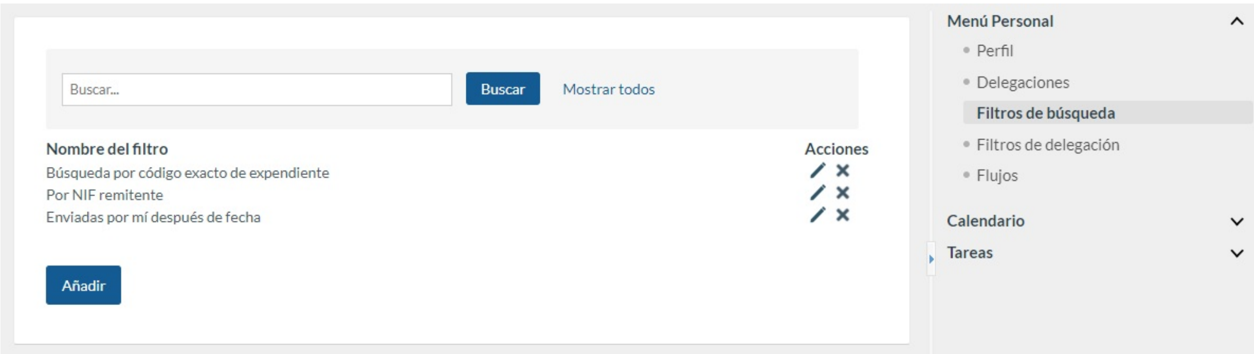
My Filters

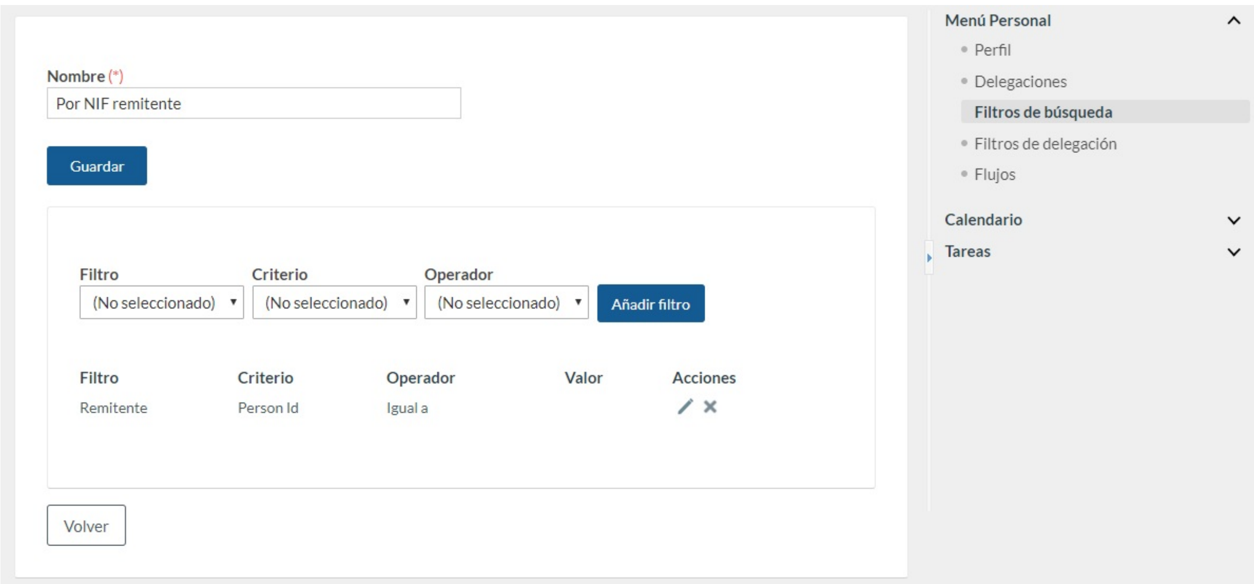
Displaying the option **My filters** on the left side of the menu we will see all the custom filters that we have already created, as well as the potential global filters that administrators have created for all the users.



In our personal menu, in the **Search filters** option we can create and manage our filters (which will later appear in **My filters**, as we have explained in the previous paragraph).



When creating a new filter, you will see a similar form to the ***advanced search***, where you can also define its name. The procedure would be to add the filters/criteria we want, and finally save the filter. We can also edit and delete the filters/criteria we have created.



Note that we can leave the **Value** field empty in this form. The system will then ask us for the value when we wish to use the filter. For example (see figure below), we could create a filter to search for requests based on ***Sender -> Person ID (NIF)***, and leave the value field empty. This way, we create a reusable filter to search for requests based on the sender ID, and the system will ask us to enter the sender ID when using the filter.

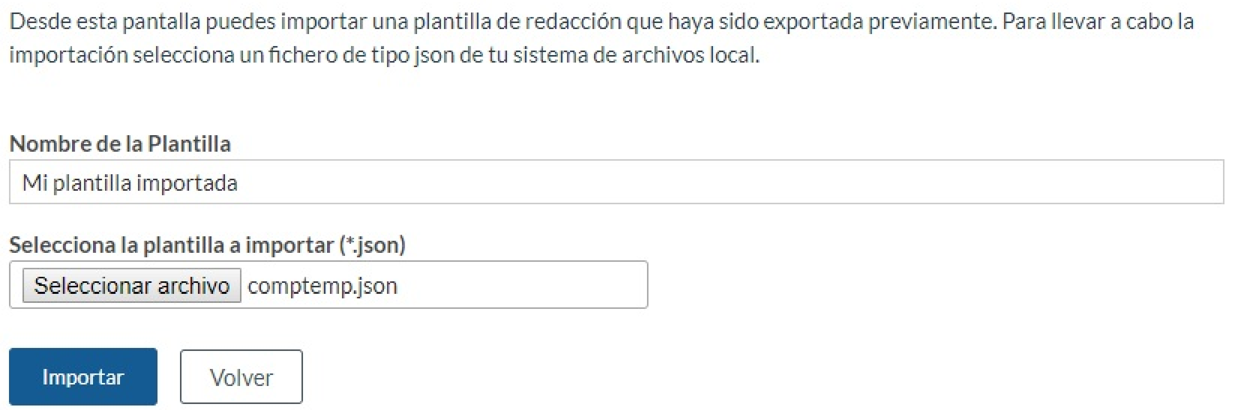
Writing Templates

From the **Editing Templates** option of the **Personal Menu** the user can access the section for editing templates. The user can manage their own writing templates to be used later in the writing form of a request. All **global** templates can also be displayed.

Composition Templates List](resources/comptemp_list.png)

First, a list with all the templates is displayed where you are allowed to:

- **Show only global templates**: we can filter by global templates in the list. If we do not apply this filter we will see all the available templates: the global ones and the ones we have shared.
- **Filter templates by a search string**: we can search for templates by entering a text in the box.
- **Edit existing templates**: you can edit existing templates. If we do not have editing permissions on the template it will be read-only.
- **Export existing templates**: we can download the templates to have the possibility of importing them in the future for ourselves or for any other user.
- **Delete existing templates**: we can delete the templates that we no longer need. ***WARNING***: this template will be deleted for all users who have shared it. If we do not have editing permissions on the template this option will not be available.
- **Add new templates**: we can add new templates to be used in the form to write a request. This will be explained later.
- **Import templates**: we can import templates from a ***.json*** file of a previously exported template:



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Create an Editing Template

Clicking the **Add** button from the **Editing Templates** section will take us to the form to add a new template to our collection. This form will be identical to the one for editing a template:

Nombre de la Plantilla (*)

Nombre de la Plantilla

☐ Plantilla de uso global

Destinatarios ?

Destinatarios

Previsualizar Flujo

Destinatarios de la comunicación interna

Añada usuarios que podrán ser comunicados con el resultado de esta petición cuando sea finalizada

Asunto

Asunto

Referencia ?

Escriba una referencia para identificar a la petición

Tipo de acceso a la verificación de firmas ?

Acceso Público ▾

Mensaje

Mensaje

Tipos de firma admitidos ?

Todos los tipos de firma (certificado, OTP SMS, firma web) ▾

Sello de firma

default ▾

Política de firma ?

(No seleccionado) ▾

Añadir metadato

☑ Enviar recordatorios automáticos a los destinatarios

Periodicidad del envío en días (mínimo 1)

1

Máximo número de envíos (mínimo 1)

1

¿Desea recibir notificaciones de las acciones relacionadas con esta petición?

- ◉ No
- ○ Aviso de lectura, firma, visto bueno, rechazo y finalización del flujo
- ○ Aviso de firma, visto bueno, rechazo y finalización del flujo
- ○ Aviso de finalización del flujo

Usuarios que comparten la plantilla

Usuario	Puede editar la plantilla	Acciones
Usuario Autenticado	Sí	✎ ✕

Añadir Usuarios

Grupos que comparten la plantilla

Grupo	Puede editar la plantilla	Acciones

Añadir Grupos

Cargos que comparten la plantilla

Cargo	Puede editar la plantilla	Acciones

Añadir Cargos

Guardar Volver

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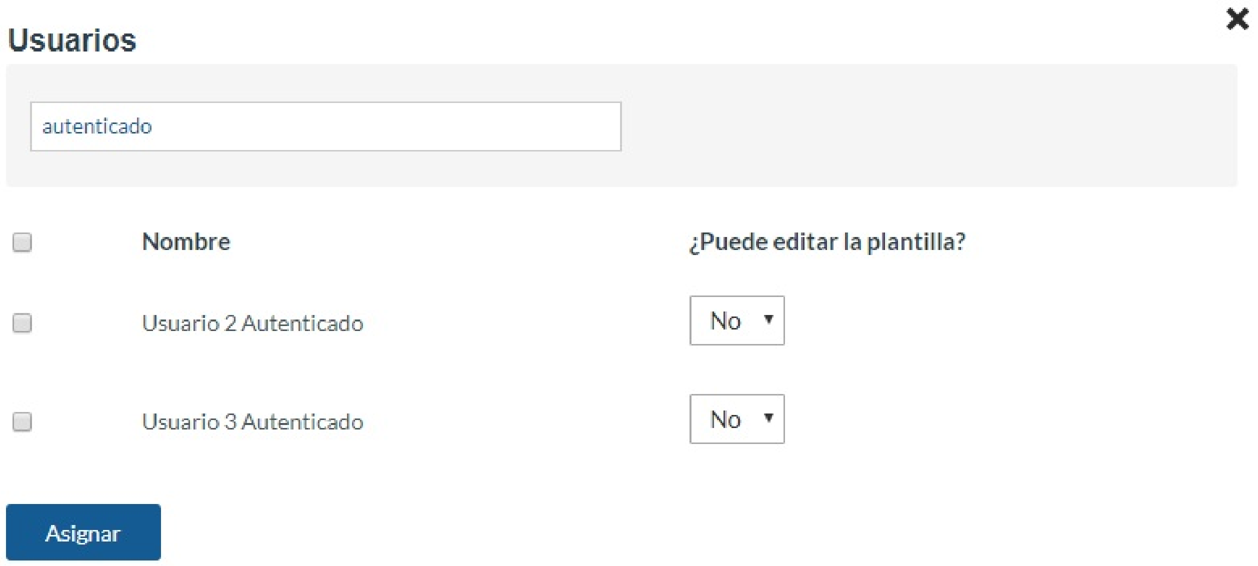
As we can see, the fields to be filled in are practically the same as when writing a request. However, the only requirement is to give a name to the template and ensure that at least one of the users sharing the template has editing permissions. The different fields are discussed below:

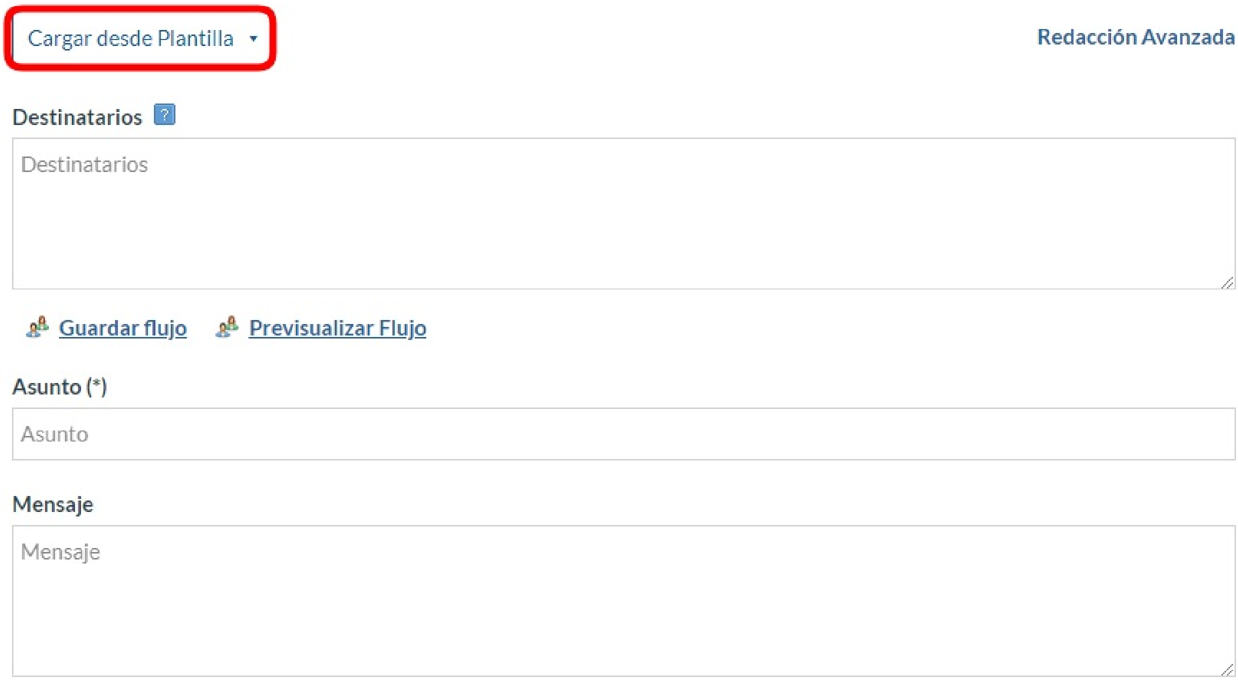
- **Template name**: name of our template (REQUIRED).
- **Global use template**: allows you to set it as global template, so that it is shared with all users of the system. This option will be available for administrators only.
- **Recipients**: recipients to whom our request will be addressed. You can click on ***Preview workflow*** to get a closer look at them.
- **Internal communication recipients**: users who can be notified of the result of the request when it is finished.
- **Subject**
- **Reference**: field to indicate a reference of the request.
- **Type of access to the signature verification**: Access type of our request (Unavailable, Public Access, User/Password, Certificate, Private).
- **Message**: Request message.
- **Supported signature types**: supported signature types for the request (Any, Digital Certificate plus biometric signature, Certificate and SMS OTP signature, digital certificate signature).
- **Signature stamp**: type of signature stamp of our request. It can also be without stamp.
- **Signature policy**: if we have defined different signature policies we will be able to choose which one we want for our request.
- **Metadata**: we can fill in and/or add metadata to the request.
- **Send automatic reminders to recipients**: this allows users to specify if they want the request to send automatic reminders to the recipients.
- **Do you want to receive notifications of actions related to this request?**: Notification level assigned to the sender of the request.
- **Users/Groups/Job position that share the template**: Here we define which users/groups/positions share the template and whether they have permissions to edit. These permissions can be modified by clicking on the ***pencil*** icon. If we no longer want a user/group/charge to share the template, click on the ***X*** icon. To add new users/groups/positions to the template click on the ***Add*** button. The following ***popup*** will appear:

To select the users/groups/positions we can search for them by a string, and we will select the ***checkbox*** if we would like to give them access to edit the template. Finally, click the **Assign** button.



Using a writing template

Now that our writing templates have been created, the only thing left to do is to use them. Go to the **Compose request** form and you will have a drop-down menu with all our available templates, either because we have created them ourselves or because they have been shared with us:



By clicking on the desired template a warning message will appear explaining that everything we have previously written in the form will be lost. Once we accept, the form will be filled in with all the information we have in the template.