

# DOCUMENT.ONLINE

# General information and service instructions

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# Registration/Authorization on the "Document.Online" portal

To get started with the Document.Online portal, go through the registration process to create a user account. To do this, on the main page of the service https://document.online/ click "Login".



#### Registration

You can create an account:

- 1. via one of the social networks (short registration);
- 2. using mobile ID;
- 3. by clicking on the "Register" button.



After clicking the "Register" button, enter all the necessary data in the registration form and click "Register".



	Create an account
	E-mail
•	Name
•	Last name
⋳	Password
⋳	Password confirmation
L	Phone number +380 •
	I agree to the terms and conditions of

An e-mail will be sent to the specified mail, where you need to confirm the registration by clicking on the link in the letter from the service "Document.Online".

Work settings

# Document.Online Your registration is almost completed



#### Authorization / Login

If you already have an account in the system, log in with a login and password (or use the login via social network).

	Sign in	
	6 <b>G</b> in	<b>•••</b> •••
	OR	
•	E-mail	
~	Password	Ø
⋳		

Password recovery If you have forgotten your account password, click on the "Forgot your password?" Button. In the modal window that appears, specify the e-mail with which you logged in to the service, and click "Confirm". An e-mail will be sent to the specified e-mail with a link to change the password.



#### **Password recovery**

If you have forgotten your account password, click on the "Forgot password?" Button.

In the modal window that appears, specify the e-mail with which you logged in to the service, and click

"Confirm". An e-mail will be sent to the specified e-mail with a link to change the password.

# Document.Online Password recovery Please enter the e-mail

CONFIRM



# How to invite an employee or contractor to the system?

You can invite a user to register in the system through the menu item "Invite user" in the account.

ocuments +	All doou	ments									-		
All documents		Name	NP	Document date 1 Creation date	Туре	My act	Status	Sender	Author	Sides	< F	low templates	T
		Acturationarea		09.09.2022 09.09.2022	Revocation	۲	Pending for processi	Данис Котовський	Денис Котовський	Котовський Денис Ігорович	8	locument types	
My documents Shared with me		test	1	09.09.2022 09.09.2022	Agreement	0	In the process of rev	Денис Котовський	Данис Котовський		+ •	wite users	
Requests:		test	31 	09.09.2022 09.09.2022	Agreement	$\odot$	Reading for processi	Данис Котовський	Данию Котовський	"ДОКУМЕНТ.ОНЛАЙН" ПРЕОБРАЖЕНСЬКА 2	-	og out	
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My packages		Test document		19.08.2022 19.08.2022		0	Uploaded		Денис Котовский				
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In the modal window that opens, enter the user's e-mail (one, or through someone - several), write a short cover letter and click "Send":

	Al docur	nerts										
locuments *		Name	Ne	Document 1 Creation		Тури	My act	Status	Sender	Author	Sides	= •
All documents		Astasotopasen		09.09.2022		Revocation			Дению Коловський	Денис Котоеський	Котовський Денис Ігорович	~
My documents		test	1	09.09.2022		Agreement	0	in the process of rev	Bauer Krimersault	Деник Котрерький		
Shared with me				09.09.2022			-					
Requests:		lent	1	09.09.2022		Agreement			Дению Коловський	Денис Котовський	"ДОКУМЕНТ.ОНЛАЙН" ПРЕОБРАЖЕНСЬКА 27	
to sign		TD.PDF.1.65.edt		00			ser invitat	ion	×	Галина Міхосва		
to sign by stamp to approve				00					17.00 T			
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Packages		Test document 2		19		nal addressivel your early		orable pruitiple emails should	I be separated	Денис Котсеский		
My packages		Test document		19		e you to join Docu	ment.Online!			Дению Котовский		
rchive				0		e to the letter						
irash									SEND			
Wy sections +					_	_		CANCE	L SENU			
Send report												
Send report												

The invited user will receive a corresponding letter to the specified email:



#### How to configure the contractors list?

For convenient and fast work with the system, you can create a directory of your contractors.

To do this, select "Counterparty Directory" in the account settings menu.

Create 4 Upto	and						< ~	nate workflow	sprove Sign	/ Edit GO Link	Profile setting	Vove
ocuments .	Al docur	ments								7	Contractors	st
		Name	NP	Document date	Туре	My act	Status	Sender	Author	Sides	< Flow templat	
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My documents Shared with me	0	test	1	09.09.2022 09.09.2022	Agreement	0	In the process of rev	Денис Котовський	Денис Котовський		+ Invite users	
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to sign to sign		TD_POF_1 05.edf		09.09.2022 09.09.2022	Agreement	$\odot$	Pending for processi	Галина Монесва	Галина Міхесва			~
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Checked documents	0	Test document	1	09.09.2022 06.09.2022	Agreement	0	Processed	Денис Котовський	Денис Котовський			~
D Packages		Test document 2		19.08.2022 19.08.2022		0	Uploaded		Дение Котовский			~
My packages		Test document		19.08.2022 19.06.2022		0	Uploaded		Дению Котовский			~
ash ly sections + end report gs©REPORT												

# Click the "Create contractor" button to create a new card.

DOCUMENT	UNLINE Documer	nt name or docu	iment number Q Exter	ded search			* 067 419 29 11 • 099 499 29 11	Den 🛛 🔑	L sai d,l.com	
Create contractor	Compators ist									
uments +	Full name		Email	Phone	Company name	Identification code	Position	Your identifier		
documents			djor com						± /	r
ared with me	Mix		Ive:	+380					/	r
quests:	Бух	nt.Online	buh (a construction and line	+38						۴
o sign o sign by stamp	Kon constant and a second		d.kolovany a occument.online	+380					** /	P

#### Fill in the data on the contractor card. Click

ave".	actor information
Full name *	
Email *	Phone
Company name *	Identification code
Position	Your identifier
Address	
Individual Tax Number	Account
Bank name	MFO
	Sava

If this contractor is not registered in the "Document.Online" system - invite him to become a user. To do this, click on the icon:





Add the accompanying text to the invitation and click the "Submit" button. You can edit or delete the created counterparty card at any time.

ents •	Contractors list						
	Full name	Email	Phone	Company name	Identification code	Position	Your identifier
cuments		djoric007@gmail.com					
ocuments ed with me	Мокесва Галина	Ivet.der@gmail.com	Cont	ractor information	×		7
uests:	Sparanrepve Document Online	buh@document.online	Full name *				12
sign sign by stamp approve	Котовський Даниес	d.kotovsky@document.online	Des <sup>a</sup>	Phone	-		
cked documents			Company name *	Identification code	- 11		
ickages			Position	Your identifier	- 88		
ly packages e			Address		- 11		
			Individual Tax Number	Account	- 11		
tions +			Bank name	MFO	_		
report REPORT				-	R/8		

#### Setting the list of document types

You can set up a list of frequently used documents via the "Document types" menu item in your account. Click on the user icon to open the menu.

											A Destruction	
Create 🚯 Uplo	bad						< on	tate workflow	oprove Sign	🖌 Edit 🕞 Link	Profile settings	Move -
	All docum	ments									Contractors list	
I documents		Name	59	Document date 1 Creation date	Туре	My act	Status	Sender	Author	Sides	< Flow templates	
y documents	0	Artuevnosalem		09.09.2022 09.09.2022	Revocation	۲	Pending for processi	Денис Котовський	Денис Котовський	Котовський Денис Ігорович	Document types	
ared with me		feed.	1	09.09.2022 09.09.2022	Agreement	0	In the process of rev	Денис Котовський	Денис Котовський		+ Invite users	
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o sign o sign by stamp		TD_PDF_1 (2).odf		09.09.2022 09.09.2022	Agroement	$\odot$	Pending for processi	Галина Міхосва	Галина Міхосва			~
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hecked documents	D	Test document	1	09.09.2022	Agreement	0	Processed	Денис Котовський	Денис Котовський			v

In the window that opens, select the types of documents you need by checking each of them, and click "Save":

arch		م
Adjustment calculations to tax invoice	3rd parties acceptances	Acceptance Invoice
Acceptance certificate	Acceptance certificate adjustment	Acceptance write-off of materials
Accounting certificate	Act of acceptance-transfer	Act on amending the wage changes
Addendum to the Contract	Addition	Additional Acceptance
Additional agreement	Advance report	Agreement
Application	Application KB-2v	Application KB-3
Application for opening a credit line	Application form	Balance sheet
] Bank guarantee	Channel information	Check
Checklist	Comissioner's report	Common discounts assignment
Computation of separation costs	Confirmation of an order	Contract of SPA- membership
] Contracts	Credit application	Delivery Request
Delivery note	Description	Detailing the Act of executed works
Difference invoice	Draft	Draft
] E-Invoice	Encashment	Estimate
7 Evtrant	Fund Transfer Instruction	Goode deepatch note

In the window that opens, select the types of documents you need by checking each of them, and click "Save":

	Upload file	
Choose file Maximum file size is 20 MB	2	<ul> <li>Upload external signature</li> </ul>
Document date (dd.mm.yyys) 10/3/2022	Toper	Number
End date	Adjustment calculations to tax invoice 3rd parties acceptances Acceptance Invoice	Sum
Sides + Identification code	Acceptance certificate Acceptance certificate adjustment	×
Identification code Additional data (public) -	Acceptance write-off of materials Accounting certificate	×
Name	Act of acceptance-transfer	×
Additional data (private)	<b>t</b>	
Name	Value	×
		Uniond



## Workspace column settings

#### Display documents in the "Document.Online" system

Documents available in your account are listed.

	ONLI	NE Document name of	r document number Q.	Extended search					1 067 419 3 099 499 3	19 11 @ EN 🞯 🧬	Денис Котовски djc	мй .com	0.
🕒 Create 🕼 U	pload						< •	workflow (	Approve Sign	🖌 Edit 🕞 Link	Save *		Move *
Documents +	All do	cuments											
		Name	N	Document date 1 Creation date	Туре	My act	Status	Sender	Author	Sides	ŀ	= ¢	• •
All documents	-	Акт анулювания		09.09.2022	Revocation	۲	Pending for processi.	Денис Котовський	Денис Котовський	Котовський Денис Ігорович		~	
My documents	-	-		no no 2022	Annument	-	In the process of rev	Rouse Konnersona)	Bauer Konnersonik				

Available fields in the list of documents:

- 1. Name the name of the document. Specified by the author of the document when loading it into the system.
- 2. № document number. Specified by the author of the document when loading it into the system.
- 3. Document date the date on which the document was issued. Specified by the author of the document when loading it into the system.
- 4. Creation date the date of creation of the route of approval to the document in the system.
- **5. Type** the type of document. Indicated by the author of the document when loading it into the system, selected from the list of certain types of documents (Act of work performed, contract, invoice, etc.)
- 6. My actions are the action you expect or have taken on the document. Filled by the system automatically.
- Status the status of the document in the system within your account. Filled by the system
  automatically. Sender is the name of the user who sent you the document. To be filled in for incoming
  documents.
- 8. Author is the name of the user who uploaded the document. Filled in automatically by the system.
- **9.** Sides persons who are listed in the document as parties. Indicated by the author of the document when uploading it to the system.

To adjust the number and width of the columns displayed in the list, click the Settings icon.

		Crit	aate workflow	Approve Sign	Edit 🕞 Link	Save + Move +
/pe	My act	Status	Sender	Author	Sides	≕ 🗘 🝸
evocation	۲	Pending for processi	Денис Котовський	Денис Котовський	Котовський Денис Ігорович	~
greement	0	In the process of rev	Денис Котовський	Денис Котовський		~

The "**Column Options**" window allows you to display the number of columns you need from existing ones and add new columns.

The additional columns created by you will display the data you entered in the fields "Additional data" (public) and "Additional data" (private) when uploading documents to the system:

		Upload file	
Choose file			P Upload external signature
File name			
Document date (dd.mm.yyyy) 10/3/2022	۲	Туре	Number
	۵	Base document number	Sum
Sides +	5	Base document number	X
Sides + Identification code Identification code		Name	×
End date Sides + Identification code Identification code Additional data (public Name Additional data (private	) +	Name Name Value	×

To not display a column, select the desired column and press the "Left" button to remove it from the list of current columns.



The column will go to the "Available columns" section, where you can return it at any time.

It is also possible to create and add a new column to display additional data on documents. To do this, enter the name of the additional data in the "Additional column" field and click on the "+" icon.

Avaliable columns	Current columns	
Progress With deadline overdue Execution date Task without documents(resol Upload date Order is confirmation Name of active group Participants of active group Action is expected from End date Sum Base document number	<ul> <li>Nx (8%) Date (13%) Type (11%) My actions (5%) Status (11%) Sender (14%) Author (14%) Sides (24%)</li> </ul>	0
Additional column	Width 0	%

The new column will be added to the "Available columns" list, from where it can be moved to the "Current columns" section by selecting and clicking on the "right" button.



Select a column from the list of current columns and use the up and down arrows on the right to set the desired order of the columns.

The Auto Column Alignment item lists the current columns full screen in proportion to the values specified for the columns. If you want to adjust the width of the columns for display - uncheck the auto-alignment.

Use the Restore Defaults button to restore the default number and order of table columns.



# **Sections of documents**

All documents in your account are divided into the following sections:

Section name	Description of documents
All documents	All documents created by you or available to you
My Documents	Documents created by you
Shared with me	Documents sent to you by other users
To sign	Documents sent to you for signing
To sign by stamp	Documents sent to you for signing by stamp
To approve	Documents sent to you for approval
Checked documents	Documents that you have marked with checkboxes for mass actions with them
Archive	The section where you can save processed documents
Trash	A section where you can save documents that are not relevant to you
Packages	The section that displays the packages I have access to, including the
My packages	account packages associated with my account
<b>,</b>	The section that displays the packages that belong to the account under
Tasks	which the user logged in
	A section that will display tasks that require certain actions on your part
	Here are the sections you created
My sections +	

Important: Documents transferred to the Archive or Trash are not displayed in the "All Documents" section.

#### Setting the initial section to display

If you most often work with a certain section of documents (for example, "Packages"), you can configure the system so that after logging in to your account automatically opens this section. By default, the "All documents" section opens.

To do this, go to Profile Settings.

DOCUMENT	ONLINE Document name or document	number Q	Extended search				* 0 • 0	67 419 29 11 99 499 29 11	en 🛛 🧬	Де ой djc Loom	0.
Create Up	pload					Create workflow	Approve S	Sign 📝 Edit	🖨 Link	2 Profile settings	Move *
2	Checked documents								/	Contractors list	
All documents	Name Name	N	Document date † Creation date	Туре	My act Status	Sender	Author	Sides	/	Flow templates	T
					Your checked documents wil	be displayed in this section.				Document types	1
My documents										+ Invite users	
Shared with me										🛌 Log out	
Requests:										Log out	1
to sign											
to sign by stamp											

# In the "My Settings" section, select "Section Settings".

	NLINE Document name or document number Q Estanded search	☆ 007 419 29 11 ⓒ 0199 499 29 11   ③ EN   ②   ▲           ▲
Documents +	Potle	
All documents My documents Shared with me Requests: to sign to sign by stamp	Your identifiant: ①       Add       Main description       Add       Main description       Add       Teamic       Planace Main concerned	Add your shareful to share revenues about the
to approve Checked documents (i) Packages (i) My packages	Iom Phone: +300505560  Add that with Decimient Online  Edd profile	Add GLM is situit receiving documents Generato renter 's GLM
Archive Trash My sections +		Sur relative partner
Send report Liga REPORT	My settings  Go to contractors list  Coursent types  E Section settings	

In this window, select the section that will open automatically after entering the office.

Also in these settings, you can collapse the list of main sections, if you mainly work with "My sections", ie created by you personally. To do this, clear the "Show section list in expanded form" checkbox.

Click "Save".		
	Section settings	×
Initial section Packages		-
Show a full list of sections		
		Save

The next time you enter to your account, the "Packages" section will automatically open.



#### **Tariffs and payment**

Tariff connection and payment for services

To pay for a package of services, follow these steps:

- 1. Go to User Profile Settings.
- 2. Go to the Subscriptions section and click Pay.

Subscriptions					
Name	Start date	End date	Monthly usage	Total usage	Status
Demo 10 documents	27.09.2021	27.09.2022	2	2	Active
Pay					

3. You can choose the appropriate tariff and pay in a way convenient for you (pay by card or issue an invoice).

		-	
Plan 100	Plan 500	Plan 1000	Plan 10000
documents per year	documents per year	documents per year	documents per year

You also have the opportunity to choose an individual package if no tariff suits you. To do this, leave a request at https://document.online/, indicating your name, e-mail, and phone number on the portal, and our manager will contact you.

	Plan
	Advanced
10	Process more than ) 000 documents per year?
We w	ill create a rate plan exactly for your company needs.
Name:	
Email:	
Phone:	+380
	Contact me



#### How to connect an employee to your tariff?

To share the same subscription with your employees or contractors, follow these steps:

1. Go to User Profile Settings

	T.ONL	INE	Document name or document	t number Q	Extended search					* 067 415 © 099 499	9 29 11 @ EN 🕢 🤌 🖞	ià Com
🔁 Create 🛛 🕰 L	Upload							< 0	reate workflow	Approve	Edit GO Link	Save Move +
Documents -	All d	locum	ents									
All documents	[		Name	Ne	Document date 1 Creation date	Type	My act	Status	Sender	Author	Sides	≡ \$ ▼
All documents	1	0	Актанулювання		09.09.2022	Revocation	۲	Pending for processi.	Денис Котовський	Денис Котовський	Котовський Денис Ігорович	~
My documents	1		test	1	09.09.2022	Agreement	0	In the process of rev	Денис Котовський	Денис Котовський		v
Shared with me					09.09.2022		1.00				warman and the second state of the	
Requests:			test	1	09.09.2022 09.09.2022	Agreement	$\odot$	Pending for processi	Денис Котовський	Денис Котовський	"ДОКУМЕНТ.ОНЛАЙН" ПРЕОБРАЖЕНСЬКА 27	~

2. In the "Users who use my subscription" section, click the "Add" button and enter the email addresses of the users with whom you want to share a subscription:

D DOCUMENT OF	LINE Document name or document number Q. Extended search	1007 419 29 11 © EN Ø P 4 com 0 +
Documents All documents	Log out	Cur reliable partner
Shared with me Requests: to sign to sign by stamp	My settings	
to approve Checked documents	Subscriptions Add user ×	State
My packages     Archive	Name         Start data         Specify users and will be done to user your Judiciption         tal usage           Deno 10 documents         27.00.00*         Emails         Emails         Emails           Pay         CANCEL         ADD         CANCEL         ADD	satus V Active
Trash My sections +	Users I share my subscription with	
Send report		

The user to whom you have granted the right to use your subscription will receive an email.

If you want to unsubscribe from a user, just click the "×" next to the appropriate user:

Users I share my subscription with		
User	Date	Remove
white come	04.10.2022	×



# Editing your profile

In the upper right corner, click on the profile image and then on "Profile Settings".

	ONLINE Document name or do	cument number Q	Extended search				e	067 419 29 11 099 499 29 11	en @ 🧬	Де djc	iñ Leom	0.
Create 4 Up	load					< Create workflow	Approve     (	Sign / Edit	😅 Link	\$	Profile settings	Wove *
	Checked documents								/	8	Contractors list	
All documents	Name Name	N	Document date 1 Creation date	Туре	My act Status	Sender	Author	Sides	/	<	Flow templates	T
					Your checked documents will be	e displayed in this section.				e	Document types	
My documents										+	Invite users	
Shared with me										1000	Log out	
Requests:										-	Log out	1
to sign												
to sign by stamp												

Then click the "Edit Profile" button and change the required information: last name, first name or phone number.

	INLINE Document name or document number	Q Extended search	© 002 419 23 11 ⊕ EN ❷ 🧬 :
Documents • All documents My documents Shared with me Pequests: to sign by stamp to sign by stamp Chacked documents • Packages • Packages Archive Trash	Profes	For identification     Image: Contract of the contract o	<image/> <section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header>
My sections + Send report Lign@REPORT	My settings	Document types Section settings	

Click "Save". Changes will be saved.

	Choose file	
Profile info	Maximum file size is 20 MB	
First name *		



#### Using the dashboard

Details of the document can be viewed in the list of documents, without opening the document itself - using the Dashboard. That is, the Dashboard is nothing more than a quick view of the data on the document.

To use this feature, go to the desired section and click on the "Dashboard" icon located in the header of the list of documents.

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Documents -	All docur	ments									
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to sign		TD_PDF_1 (2).pdf		09.09.2022	Agreement	$\odot$	Pending for proces	Галина Міхесва	Галина Міхесва		<i></i>

By clicking on the documents, you can view information about them and perform quick actions. All buttons are active.

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#### To return to the regular list, click the Dashboard icon again.

To open the required document for viewing when using the Dashboard, simply click on the name of the desired document or use the document opening window.

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to sign to sign by stamp		TD_PDF_1 (2).odf		09.09.2022 09.09.2022	Agroement	$\odot$	Pending for processe.	Галина Мокесва	Галина Міхосва			1	1
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## Statuses of documents in the system

In the process of working with documents, their status in the system changes depending on the action.

Document status	Description
Uploaded	Assigned when downloading a document.
Approval request from recipient Signature request from recipient	Assigned to the document that was sent by you for the approval of your counterparty.
Completed	It is assigned to the document that was sent by you for signing to your counterparty.
Rejected by recipient	Assigned to the document when the assigned route of the Agreement has been passed by all participants.
Pending for processing	It is assigned if the participant of the Agreement has rejected the document.
Processed	Assigned to the document if it was sent to you to perform a certain action (signing / approval).
	Assigned to the document when you have performed the assigned action (signed / agreed or rejected).
Overdue In the process of revocation	Assigned to the document if the participant has not performed the assigned actions with the document by the set time. Any actions with such a document are prohibited.
Restricted access	Assigned to the document if the participant has withdrawn the document
	The sender or author has taken away your right to access the document. The ability to perform actions on the document is suspended.
Revoked	The document was annulled, formed "Act of Cancellation" was signed by all parties who previously signed the document.
My actions	

#### My actions

The "My actions" field indicates the action you have already taken or need to take.

	Pending signature
$\odot$	Pending approval
0	Signed
0	Approved
×	Rejected
0	Reviewed

#### **Example:**

You uploaded the document to the system, signed it with the QES and sent it to the contractor for signing by him.

You will see this document in the "My Documents" section; The status of the document will be "Signature request from recipient";

Signed icor 🚫 /ill appear in the My Actions field.

Name	Na Q,	Docume, Type	My actions	Status	Sender	Author
Акт виконаних робіт №0000000988 від 0310.22.pdf	0000000988	03.10.2022 Accepta 04.10.2022	0	Signatur	Document.Onl	Document.Onl



# **Uploading documents**

To upload the document to the portal, click the "Upload" button:



In the modal window that opens, select the desired file from your computer. The maximum file size that can be uploaded is 20

MB. Fill in the information about the document.

#### Fields to fill:

Document name	Enter the title of the document. If no name is specified, the document will be given the name of the downloaded file.
Date	Select the date the document was created from the drop-down calendar or enter it manually in the format "DD.MM.YYYY".
Туре	Choose the type of document from the available list (certificate of work performed, contract, etc.).
Number	Assign a number to the document.
End date	Select the end date of the document from the drop-down calendar or enter it manually in the format "DD.MM.YYYY". The "end date" can be used for documents such as contracts. If necessary, you can specify this attribute for any document. You will receive an email reminder 30 days before the deadline.
Reason document number	Indicate the number of the ground document.
Sum	Specify the amount specified in the document.
Parties	Add a list of parties listed in the document. To do this, just start entering the USREOU code or company name. The system refers to the open state registers and selects the options of the relevant legal entities to choose from. If for some reason the desired company could not be found - enter the details of the company yourself.
Additional data (public) / (private)	Add additional parameters to the document filter later. Specify the name of the parameter and its value. "Public data" will be visible to all participants to whom the document was sent, and "Private data" will be visible only to you. You can also use "Additional Data" later to display a list of workspace documents in Current Columns (see Configuring Workspace Columns).



After filling in the required fields, click the "Upload" button.

Important! It is worth noting that these fields are optional, but the entered attributes greatly simplify the processing of documents on the portal, in particular in the context of their search and sorting. This is especially true when working with a large number of documents.

Once uploaded, the document will appear in the list of documents in the "My Documents" and "All Documents".

# Creation of documents according to system templates

You have the opportunity to create documents from the system templates offered on the portal.

Click the "Create" button to create the document.

B Create 🕰 Upload						<0	este woldow	Sapr / Co	CO Link Som - Move -
Documents -	Al documents								
Documents -	Name	Ne	Document date 1 Creation date	Type	My actions Status	Sender	Author	Sides	= 🌣 🕇

A window for selecting a template for creating a document will open:

		Document templates			×
Search	Template name or company name				۹
Search by company	Any template name	<ul> <li>Any category name</li> </ul>	•	Any company name	•
Frequently used	Sales agreement				
	Sales agreement For company: "TUFANDAG" GYTIK M	MC			
	Sales agreement For company: "QƏBƏLƏND" MMC				
	Sales agreement For company: "QAFQAZ-LENKERAN"	MMC			
	Sales agreement For company: "GILAN HOSPITALITY O	SROUP" MMC			
	Təhvil-təslim aktı				
	Vacation Request Applic	ation			
	/in7akaz				

Click on the name of the template. Fill in all required fields. Click the "Save" button.

The created document will appear in the "My Documents" and "All Documents" sections.

WARNING! The list of available templates will be constantly updated on the "Document.Online" portal, stay tuned for system updates.

## **Signing documents**

To sign the document, open the required document.

To do this, click on the document name in the work area or use the document opening window:

🖹 Create 🙆 Upload										< Onale workflow	Approve	(Step	/ 58	GO Link	a tave -		Milve -	-
Documents •	All docur	Name			Document date	Type	My actions	Fature	Sender		thor	Sides						
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My documents		Testav	lee		09.09.2022 09.09.2022			Uploaded		, A	енис Котовський	INFEOSI	Аженська 27					

After opening the document, you can view it.

Important! If the document has a wet stamp or a handwritten signature, such a document cannot be signed electronically. Documents uploaded to the CEP Overlay Portal do not need to be physically certified beforehand.

To sign the document on your part, click the "Sign" button on the toolbar.



In the modal window that opens, select how to sign the document.

For example, the way you choose to sign is with file media. To do this, click "Select" and select the folder with the required file key on your computer.

		Wo	ork with outo	joing document
Signing				×
Private key	Smart card	DepositSign	Дія Підпис	Cloud Key
	Choo	se or drag the key	/ here	

Pull up the key, enter the password and click "Add key". Then click "Sign".

The signed document will open for viewing. The signature itself will be indicated on the right sidebar, and a signature icon will appear in the My Actions column.

*Important!* The display of the QES seal on the signed document is available only for PDF documents. This print image has no legal force, it is made for visualization.



The next time you sign documents, your file carrier will automatically appear in the Signature window. To sign, just click the "Sign" button. You can also add multiple file carriers.



#### **Document workflow settings**

#### Setting the outgoing document workflow

If you need to send a document to several participants or groups of participants who need to perform certain actions on the document sequentially, use the "Workflow settings" function.

In addition, with "Workflow Settings" you can apply separate settings for each of the Recipient Groups, such as the type of action with the document ("Signing", "Agreement", "View"), the end date, and more. To configure access to your document for other users of the system, first, open the required document.

To do this, click on the document name in the work area or use the document opening window:

🗄 Create 🙆 Upload								<	Cruste workdow	(Step / 54	t 💿 Link 🔐 Tave +
Documents +	All documer	ets .									
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My documents		Testword		09.09.2022 09.09.2022			Uploaded		Деник Котовський		· · ·

After that, click the Customize Route button on the right sidebar.

	Name	NH.	Document date 1 Creation date	Туре	My actions	Status	Sender	Author	Sides		۵
	Test	1	09.09.2022 09.09.2022	Agreement		Approval requested from		Дению Котовський	T Reconversion	54* 014 27	e.
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									🗆 test		
										0.00	
		Test document							< Create workflow	S Sun	

Fill in all required fields in the Workflow Settings form that opens:

- 1. Enter the name of the group;
- 2. Leave a note (if necessary) that will be seen by all members of the group;
- 3. Select the target action to be performed by the group View, Reconcile, Sign the document;
- 4. Select the event in which the action will be considered performed:
- "One of the participants" the assigned actions can be performed by one of the added participants;
- "All participants" the assigned actions must be performed by all participants to whom the document will be sent.

		W	orkflow s	ettings					
Group 1		Group 2		-> Group 3 -		_	-	- #4	Add grou
roup name * Group 2					G	iroup	orde	r	
soup 2					~		2	$\rightarrow$	Î
lote									
pproval			*	By every user of	the group				
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pproval Vorkflow partici djoni Iden:	om		<u>*</u>		Approval re	eques 2	ted		~



- 5. If necessary, you can specify the end date of the action on the document for the Group. The end date settings for document processing are described in detail below. To set a deadline, check the box next to "There is an end date for the action" and select the desired date or period. Also select a condition if the specified action is not performed by the scheduled date:
  - "Expect the participant to take action" a conditional deadline, ie the document will be in the Group until the assigned actions are performed.
  - "Prohibit action and move to the next group" hard deadline, ie if the group does not perform the assigned actions by the specified date, it will no longer be able to perform the assigned actions; The "status" of the document for this group will automatically change to "Overdue", and the document will automatically move to the next group.
- 6.Add a member of the group specify the email of the desired person and, if necessary, USREOU / TIN (according to the specified value, the system will test the QES for this USREOU / TIN); You can add an unlimited number of members to the group using the "Add member" button.
- 7.To create a new group, click "Add group" in the route settings window to the document and fill in the fields similar to filling in the information for the previous group.



Regardless of the number of groups in the negotiation route, your document will be sent to the members of the next group only after the members of the previous group have performed the actions assigned to them.

Created groups can be deleted and moved between them. You cannot move the active group, move back the first group in the list, and move the last group in the list forward. You can delete any group (including the active one) except groups that have already completed the target action.

After filling in the required data, click "Save".

Set an end date for document processing

On the "Document.Online" portal, the contractor can send the document for signing or approval, while setting deadlines.

To set an end date for actions on your document to other users of the system, check "End action is the end date" and select the desired date.

Workflow settings		×
Group 1		Add group
Joup name ' Group 1	$\stackrel{\text{Group order}}{\leftarrow} 1 \rightarrow$	î
Note		
Send for Approval 👻 By every us	user of the group	•
Workflow participants:		
Email/Identifier* Identification con	Personal code	
2. Add user		
Group settings		^
Public flow ()  Flow type Manual		
This action has a deadline If the deadline is mi	since of t	
Group participa	ants are still able to perform their pre-s	pecified
actions	ight to perform actions for this group a xt group	nd
Hide participants of other groups		

This date is displayed when opening the document in the letter of agreement.



If the deadline period is three days, this line is displayed in yellow.

	roup 3 adline: 10/8/2022, 1	11:00:00 PM		
•	wh wh	nail.com	Approval requested 06 жовт, 2022	0
n on	e day, the lir	ne is displayed in red.		



If the action was not performed by your counterparty before the specified period, the letter of agreement shows that this document is overdue.

In the sections where this document is located, the line of the document is displayed in a certain color (yellow or red) according to the specified processing time of the document.

🗄 Create 🤷 Lipic						<	Deale workflow	Step / 1	H CO Link Store	- Move -
Documents •	All documents		Document date							
	Name	N	L Oreation date	Type	My actions Status	Sender	Author	Sides		= 🌣 🕇
All documents	D Ret.document		05.10.2022 05.10.2022		Agentivid regulation					
My documents										

The recipient (group of recipients) of the document who did not perform their action is as follows: three days and one day before the deadline for the action with the document they receive a message in the mail with a reminder that the expiration of the action with the document.

#### View the full route of the document

The route of the document can be seen on the right sidebar after opening the document. The author of the document will be able to view the full route, and other participants will see only those who are in the route in front of them.

A gray or blue icon will appear in front of each route participant.

Gray icon - The document has not yet been viewed.

Blue icon - The document has been viewed.

My workflow		
Group 1		
Note Part 1		
• <b>O</b> t		Signed 09 Sep 2022 3 18
Group 2		
Note Part 2		
• Q (	en, eucoamentoniine	Signed 09 Sep 2022 14:20



#### Editing data on documents

For documents created by you, there is a function "Edit document". To do this, click on the appropriate button in the information panel of the document:

Create workflow	Approve     Sign	🖍 Edit	GÐ Link	Save -	Move -
-----------------	------------------	--------	---------	--------	--------

This feature allows you to change the information on the document that was entered at the time of its download. After making the necessary changes, click "Save".

		Edit documents		×
File name				
Document date (dd.mm		Туре	Number	
End date		Base document number	Sum	•
Sides +				
Additional data (public)	+			
			Save	



#### **Revoke of documents**

If you signed the document and sent it to the contractor, the contractor also signed this document, but the document is incorrect, you can revoke this document.

To do this, open the document and click the "Revoke a document" button.

	Main data	Comments	
	Test document		
•	<b>D</b> . <b>C</b>	~ 🔨 💿	
ign	atures (3)		~
0	Ko	вич	Date of signing
	(C) Signature type skilled		09.09.2022 14:20
P	K	еич	Date of signing 09.09.2022 14:18
	Signature type skilled		09.09.2022 14,10
$\otimes$	Revoke a document	Create workflow S	ign

Workflow I participate in A

A window opens to indicate the reason for revoking the document. Enter a comment and click the "Start Revocation Process" button.

Re	vocaion document	×
Attention! After starting the revoo blocked for further work.	cation procedure, the document will be completely	,
Reason for revoking a document *		

After starting this process, you automatically create a "Cancellation Act" which specifies all the data about the document that is in the process of revocation. The document you are revoking is also automatically attached to this act.

DOCUMENT.ONI	LINE Document name or document number	۹ 🕞	handed search					* 067 419 29 11 (© 099 499 29 11	@ EN @ A	Дение Котовский djonic0070gmail.com
🗄 Crass 🙆 Uplant							Crada workflow	0	Edit 🕞 Link	🗎 Save - 🖿 Ma
ocuments +	Al documents		Document date	Tope	Myactions Status	Sandar	h Pro-	Sides		= 4
All documents	det ansociatent		2 Creation date 09.09.2022	Revocation	Pending for procession	Дание Катон	сыний Денис Котовський	Котовський Дене	с Ігорович	
My documents	■ Q (C < ] d3 > 31		09.09.2022	125% 0	9		0.0 =	Main data	Comments	^
Shared with me									Comments	
Requests:								Акт анулювани		
to sign								At any inveation		
to sign by stamp				Акт ія електронного док				💿 🕞 C	. 🖪 🔁	
to approve				<ul> <li>вересня 2022 року</li> </ul>	ynenta			Linked documents		
			12010					1.848		
Checked documents		Цим Астом Котовськ	ий Дение Ігорович	(Ко СДРПОУ 33	33717273) підтверджують ан	REFERENCE				
Packages		Hausa JOKYMERITA:	iniar	ı lang	зататерияние ан guage			Workflow   participate in		
My packages		est						Action sent by Ar-		
		louis town			<b></b>			Action has been d	Treckow	Delegate action
chive		Номер докум	i as a	a dei	aur			Name	Акт анулования	
sh		Дата документа:						Document date:	06.09.2022	
1311		19.09.2022						Dreation date: Upload date:	09.09.2022, 15-46-03	
sections +				1.1				Type:	Revocation	
and report		d data	anc	elati	on act				Денис Котовський	
REPORT		asocial in the state of the		ciuti				Sender:	d.kolovsky@document.e	online
		Причина анулювания:						Author		
		failure wit the sum						Sides		TODOMPI
		Електронні підписи докуг	мента, що анулюсть	ся цим актом:				Additional data (publi		
		Підписучач - 1: Котовський		3717273)				Причений анулковани	. falure wit the ours	
		Належність до Юридичної Код юридичної особи в ЄЛ						Additional data (priva	tet 🖉	
				ED5083160DBC59B0	40000006ED01100367C9B00					
		Сертифікат виданий: "Дія".	Кватіфікований над	авач слектронних доз	ірчих послуг					

This act of cancellation is sent to you for signing. After signing by you, this document is automatically sent to your contractor.

After signing by the contractor, the document receives the status "Processed".



## **Signing documents**

To sign the document, open the required document.

To do this, click on the document name in the work area or use the document opening window:

🗄 Orante 🕰 Optional									Cruste workflow	Approva	(S) Supe	/ 68	GO Link	a tere •		Mive	
Documents +	All docum	Name	N	Document date	Type	My actions St		Sender	Author		Sides			i	- 0		
All documents		test.	1	09.09.2022 09.09.2022	Agreement		provid requirement from		Деник Кот	повський	'докуме	нт.онлайн*			_	-	
My documents		Testorost		09.09.2022 09.09.2022		u	behavior		Денис Кот	повський	INFEO6P2	ЖЕНСЬКА 27	_				

After opening the document, you can view it.

Important! If the document has a wet stamp or a handwritten signature, such a document cannot be signed electronically. Documents uploaded to the CEP Overlay Portal do not need to be physically certified beforehand.

To sign the document on your part, click the "Sign" button on the toolbar.



In the modal window that opens, select how to sign the document.

For example, the way you choose to sign is with file media. To do this, click "Select" and select the folder with the required file key on your computer.

		Wo	ork with inco	ming docume
igning				×
Private key	Smart card	DepositSign	Дія Підпис	Cloud Key
	17878888887			
	Choo	se or drag the key	here	1

Pull up the key, enter the password and click "Add key". Then click "Sign".

The signed document will open for viewing. The signature itself will be indicated on the right sidebar, and a signature icon will appear in the My Actions column.

*Important!* The display of the QES seal on the signed document is available only for PDF documents. This print image has no legal force, it is made for visualization.



The next time you sign documents, your file carrier will automatically appear in the Signature window. To sign, just click the "Sign" button. You can also add multiple file carriers.



#### **Approval of documents**

To approve the document, open the required document.

To do this, click on the document name in the work area or use the document opening window:



Once you open the document, you can view it.

To approve the document on your part, click the "Approve" button on the toolbar.



The document will be approved, the "My Actions" icon and the Status of the document will change, and information about the time of document approval will appear in the approval letter.

The user who sent you this document will receive an e-mail notifying you that the document has been approved by you.

#### **Rejection of documents**

If you do not agree with the contents of the document that was sent to you in the system for approval or signing, you can notify the sender by rejecting this document.

To do this, click on the name of the desired document or use the document opening window.

	All documents								
uments +	Name	50	Document date 1 Creation date	Type	My actions Status	Sender	Author	Sides	= \$
Il documents		1	09.09.2022 09.09.2022	Agreement	Approval requirement to		Дению Котовський	D 27	
/ documents	Testword		09.09.2022 09.09.2022		Uploaded		Денико Коловський		
he rial	nt sidebar, click	¢							
the rigi ejct.	nt sidebar, click	ĸ							

ocuments +	All documents											
	Name	24	Document date 2 Creation date	Туре	My actions	Status	Sender	Author	Sides		=	\$
All documents	Inst document		10.10.2022		0	Pending for processing	White Magic	White Magic				~
My documents	■ Q 30 0 101 3 31			+ [125% 1]				© 0 ≡	Main data	Comments		
Shared with me								-				
Requests:									Test document			
to sign								6	000	0.00		
to sign by stamp										0.00	_	
to approve		Test document							🕑 Approve < Cre	ele workflow 🔕 Sign 🚫	Reject	
Checked documents									-	1		

It is mandatory to indicate the reason for the rejection of the document. Describe the reason and confirm your intention by clicking Reject.

Reject document	×
stion) *	
Reject	
	stion) *

"Rejected" will appear in the system next to the document in the "My Actions" column.



The user who sent you this document will receive an email notifying you that the document was rejected by you. The status of the document at the author will change to "Rejected by the recipient".
## Sending documents for additional approval

Let's consider a situation where additional approval is required before signing an incoming document. It is worth noting that you can personally sign the document or delegate the action to another person. Below, we will examine both situations.

Open the incoming document and click the "Create workflow" button on the right side panel.



The first group will handle the approval process. Select the target action "Approval" and enter the email of the person who will approve the document in the "Email/Identifier" field. Click "Add Group.»

	Workflow settings
Group 1	Add group
iroup name " 3roup 1	Group order (1) >
lote	
end for opproval	<ul> <li>By every user of the group</li> </ul>
logistic_test@document.online	Identification code Personal code
2 Add user	ivenini cauon cove - resonal cove
	hemiliandi Gue resoluti Gue
2. Add user	

The second group will handle the signing process.

1. If you will be signing the document, choose the target action "Signing" and enter your email in the "Email/Identifier" field. This way, after approval, the document will be automatically sent to you for signing. Click "Save.»

Group 1	Group 2			Add group
iroup name " Broup 2			Group order ← 2 →	ĩ
lote				
iend for Signature	•	By every user of th	ne group	*
ignature type Personal signature is required, stamp is optiona Workflow participants:	al 🔻			
ersonal signature is required, stamp is optional		entification code	Personal code	
Personal signature is required, stamp is option: Workflow participants: Email/deedifier*		intification code	Personal code	
ersonal signature is required, stamp is option Vorkflow participants: Email/Sardfar* Lawyer_test@document.online		intification code	Personal code	~



2. If someone else will be signing, choose the target action "Delegate" and enter the email of the person who will sign the document in the "Email/Identifier" field. This way, you delegate the signing action to the designated person, and after approval, the document will be automatically sent to them for signing. Click "Save."

v	Norkflow settings	×
Group 1	Ada	d group
Group name * Group 1	$\begin{array}{c} \text{Group order} \\ \leftarrow 1 \end{array} \rightarrow$	Î
Note		
Send for Delegation	<ul> <li>By any user of the group</li> </ul>	-
Email/Identifier* lawyer_test@document.online	Identification code Personal code	
<i>₽</i> , Add user		
Group settings		~
	Save	

## **Delegation of actions on incoming documents**

You can delegate the execution of "Approval" or "Signing" actions on documents that have been sent to you.

*Important Note:* If you receive a large number of documents for which you are not the designated signer, you can create a separate section, apply a search filter to include those specific documents, and configure automatic delegation for the entire section. This feature may be especially useful during business trips or vacations. For instructions on creating such a section, refer to the section titled **"Forwarding of documents, for example, in case of vacation"** in the instruction manual.

Select the incoming document for which you want to delegate an action, open it, and on the right panel, click the "Delegate Action" button.

=	Main data	Comments		
	Sign	Create workflow	Reject	
L	Workflow I participat	e in		
	Action sent by	Delegate	action	

In the opened modal window, enter the user identifier to whom this action will be delegated and click "Save."

	Delegate action	×
User identifier to delegate action lawyer_test@document.online		
	Delegate	

The "Delegate Action" button will change to "Remove Delegation," and information about the user to whom the action was delegated will appear next to it.



The user to whom the document action was delegated will find it in the "Sent to Me" section of incoming documents. The right panel will display information about the sender and the delegator.



After the delegated actions are completed by the user, the document status will change to "Processed" and the "My Actions" icon will change to "Signed" or "Approved," depending on the assigned action.



Before the user performs the delegated action, you have the option to delete the delegation. In this case, access to the document will be restricted for the user to whom the delegation was initially sent.

Sign	Revoke a doci	ument	Create workflow		
Reject					
Workflow I participat	te in 🔨				
Action sent by Action has been de	legated to	De	elete delegation		

## Adding and editing data on documents

The document author has the ability to edit data on the document using the respective button on the document's information panel:

Main data	Comments
Test_Business-	Confidentiality-Agreement.pdf
	- 0- 0

This function is discussed in the "Editing data on documents" section.

Additionally, each user can supplement the document with private data (visible only to them). To do this, press the corresponding button on the document's information panel:

≡ Q  < < 1 of 1 > >  - + 99.04%	೧೮೫≡	Main data	Comments	
		Workflow I participate in	^	
		Action sent by Денис Кото	зський	
Test document		<ul> <li>Group 1</li> </ul>		
		Deadline: 10/6/2022, 4	:00:00 PM	
		С Денис Котов dionic007@gn		Арргоved 07 жовт. 2022 13:27
			IBILCOTT	07 жовт. 2022 13:27
		<ul> <li>Group 4</li> </ul>		
		Deadline: 10/6/2022, 5	:00:00 PM	
		White Magic white.magic.b	and.ua@gmail.com	Approved 07 жовт. 2022 13:28
		Name:	Test document	
		Document date: Creation date:	06.10.2022 06.10.2022, 15:07:18	
		Upload date:	06.10.2022, 14:54:30	
			Денис Котовський	
		Sender:	d.kotovsky@document.online	
		Author:	Денис Котовський d.kotovsky®document.online	
		Additional data (public		
		Additional data (private		

In the opened window, use the + and × buttons to add or remove data, respectively. Afterward, click the "Save" button.



Furthermore, each document recipient can supplement public data on the document.

Added data will be accessible to all service users with access to the document, and only the person who added them can edit. To add public data, press the corresponding button on the document's information panel:



In the opened window, use the + and × buttons to add or remove data, respectively. Afterward, click the "Save" button.

	Additional public data editing	×
You are able to edit p	oublic data created by you	
Additional data (p	ublic) +	
Name	Value	
		~
	0 mm	
	Save	
		4 -





## Linking between documents

The "Link" function is very convenient when you need to establish a connection between one or several documents in the system, for example, linking a "Work Completion Certificate" to a previously generated "Invoice.

To do this, on the document's information panel, click the "Link" button:

Main data	Comments	
Test_Business-	Confidentiality-Agreement.pd	f

In the opened window, choose the name or number of the document in the system to which the current document needs to be linked:

Attention! If you check the "**Public**" checkbox, the link will be visible to all document recipients. Otherwise, the link will be available only to you.

Link the document	×
You link the document: Test_Business-Confidentiality-Agreement.pdf	
Select the document:	
Document name or document number	
public link	
	Link

You can link one or several documents, simply repeat the actions described above.

## Print and save documents from the system to a computer

To save or print the document, start by opening it.

Name	Nº	Document date	Туре	Му	Status	Sender	Author	Sides	=:	٥	Ŧ
Agreement	1	04.05.2023 05.05.2023	Agreement	0	Processed	Денис Котовський	Денис Котовський			$\sim$	

On the information panel (on the right), select the "Save" button:

	Main data	Comments
--	-----------	----------

□ Test\_Business-Confidentiality-Agreement.pdf



Depending on the stage of the approval/signing process the document is in and the format in which it was uploaded, you have the option to download up to 4 document versions. To do this, use the "Save" button and choose the version you need:

- Download the original document (the document format in which it was created, before electronic signatures were applied).

- Download the document with signatures (after electronic signatures have been applied to the document).

.P7Sp - Download the document with electronic signatures in the .p7s format.

- Download the document with the signing/approval protocol (a document with a visual display of applied signatures in PDF format and protocols at the end).

- Save the printed form (the document will be downloaded exactly as it appears in the left viewing window).

*Important!* The route author (the user who initiated the approval or signing process for the document) can **download the document with the approval route protocol**, containing information about those who approved or signed the document, with a timestamp of the action. The option to **download the document with the signature protocol** is available to all users.

## Moving documents to "Archive" or "Trash"

On the information panel (on the right), select the "Move" button:

Test\_Business-Confidentiality-Agreement.pdf

		e	
Signatures (3)	•	Move to archive	
	ĒF	Move to trash	

And choose the necessary action: move the document to the "Archive" or "Trash."

*Important!* If a document or a document package has been sent for specific actions (e.g., "Signing") and the assigned actions have not been completed yet, the function to move the document to the "Trash" will be unavailable until the assigned actions are completed.

#### **Restoring a Moved Document:**

If you need to restore a document moved to the "Archive" or "Trash," go to the respective "Archive" or "Trash" folder where the document was previously moved, and repeat the same actions by clicking the "Move" button, after which the "Restore Document" function will be available.



## **Comments on documents**

The document information panel consists of two tabs: "Basic Data" and "Comments."

The "Comments" tab is configured as a chat for exchanging messages with users to whom the document has been sent.

To view the chat history, navigate to the "Comments" tab. To leave a new comment on the document, type the message in the window and press the "Post" button.

*Important!* Notifications about comments are received by all users who have access to the document. All comments are saved. If important notes are provided in the comments, the chat can be used as a history of document processing.

	Main	data			Comm	ents				
	Add	comm	ient							
6	$\diamond$	В	Ι	:=	2	<u></u> ×				
							 	 	0 /	255
								,	Post	



## Mass actions with documents

At the top of the workspace, there are buttons for mass actions with the selected document or documents:

Create workflow	Approve Sign Fedit GD Link Save - Move -
Button Name	Functions
Create workflow	Sending the document/documents through a route, which may include multiple groups of participants with assigned deadlines for actions on the document/documents being sent.
Approve	Allows performing the "Approval" action on the selected document/documents.
Sign	Allows performing the "Signing" action on the selected document/documents.
Save	Button for saving the document/documents to the internal storage of the computer.
Move	Button for moving the selected document/documents to the "Archive" or "Trash".

To add a document to the list of documents subject to mass actions, check the checkboxes next to the required documents in the general list. By the way, you can select all documents on the page at once by clicking the checkbox at the top.

Create 🚯 Up	load		Create workflow	Approve Sign	CO Link	Save - Move -
Documents A	All documents					
	(4) Name	Nº Docume ↓ Creati Type	M Status Sender	Author Sides	My identifier Docum Sum	Execution d =: 🏟 🍸
All documents						
My documents	Agreement	1 04.05.2023 Agree 05.05.2023	🔇 Compl Денис Ко	Денис Ко	d.kotovs 10000	05.05.2023 ~
Shared with me	Agreement Test work	05.05.2023 05.05.2023	Uploaded	Денис Ко	d.kotovs	~
Requests: to sign	Agreement Test word 2	05.05.2023 05.05.2023	Uploaded	Денис Ко	d.kotovs	~
to sign by stamp	Agreement Test_word 1	05.05.2023 05.05.2023	Uploaded	Денис Ко	d.kotovs	~

Choose the necessary action from the toolbar (e.g., "Sign").

Create Dpload	l				Create wor	kflow	Approve	Sign	🖍 Edit 🕞	Link	Save -	Move -
Documents -	All documents			L				1				
	(4) Name	Nº	Docume 1 Creati Type	e M.	Status	Sender	Author	Sides	My identifier Docum	Sum	Execution d	ф т
All documents					-			/				
My documents	Agreement	1	04.05.2023 Agre 05.05.2023	e 🤇	Compl	Денис Ко	Денис Ко		d.kotovs	10000	05.05.2023	~
Shared with me	Agreement Test work		05.05.2023 05.05.2023		Uploaded		Денис Ко		d.kotovs			~
Requests: to sign	Agreement Test word 2		05.05.2023 05.05.2023		Uploaded		Денис Ко		d.kotovs			~
to sign by stamp	Agreement Test_word 1		05.05.2023 05.05.2023		Uploaded		Денис Ко		d.kotovs			~

In the modal window, a list of documents selected for mass action will appear. If, for any reason, the operation is not possible for the selected document, the system will notify you and indicate the number of documents that will be processed.

Sign do	cuments	×
Selected documents: 4		
Agreement Test work 5 трав. 2023 р.		×
Agreement Номер: 1 4 трав. 2023 р.		×
Agreement Test word 2 5 трав. 2023 р.		×
Agreement Test_word 1 5 трав. 2023 р.		×
Will be signed: 4	CLOSE	SIGN

In the modal window, a list of documents selected for mass action will appear. If, for any reason, the operation is not possible for the selected document, the system will notify you and indicate the number of documents that will be processed.



If a document was added to the queue by mistake, remove it from the list by clicking the cross icon next to the name of the erroneous document.

Sign doo	cuments ×
Selected documents: 4	
Agreement Test work 5 трав. 2023 р.	×
Agreement Homep: 1 4 трав. 2023 р.	×
Agreement Test word 2 5 трав. 2023 р.	×
Agreement Test_word 1 5 трав. 2023 р.	×
Will be signed: 4	CLOSE SIGN

If the list of documents is correct, press the "Sign" button.

Regardless of the number of documents in the list, all of them will be processed by the system.

Close the mass actions window.

Sign do	cuments	3
Selected documents: 4		_
Agreement Test work 5 rpas. 2023 p.		~
Agreement Номер: 1 4 трав. 2023 р.		~
Agreement Test word 2 5 трав. 2023 р.		~
Agreement Test_word 1 5 трав. 2023 р.		~
	CLOSE	SIGN



## How to open and process an incoming document package

Create 🖸 Upload	-							
Documents 🔺	Package	es						
All documents		Name		Nº	Document date	Туре	м	Status
	Q	Package 1		1248	05.01.2024 05.01.2024	Package of documents	0	Approval requeste from recipient
My documents	0	Package 2		GCT	05.01.2024 05.01.2024	Package of documents	0	Completed
Checked documents	©	Package 3		1710	05.01.2024 05.01.2024	Package of documents	0	Approval requeste from recipient
Requests:	0	Package 4	No. a constantino de	1435	05.01.2024 05.01.2024	Package of documents	0	Completed
to sign to sign by stamp	0	Package 5		1715	05.01.2024 05.01.2024	Package of documents	0	Completed
to approve	O	Package 6		1429	05.01.2024 05.01.2024	Package of documents	0	Signature request from recipient
i)Packages	0	Package 7		1426	31.12.2023 05.01.2024	Package of documents	0	Completed
<ol> <li>My packages</li> </ol>	0	Package 8		425	31.12.2023 05.01.2024	Package of documents	0	Completed
Archive	O	Package 9		1710	05.01.2024 <b>05.01.2024</b>	Package of documents	0	Approval requeste from recipient
īrash		-		100	05 04 0004			

Navigate to the "Packages" section and open the required package by clicking on its name.

After opening the package, you will see a list of documents included in it. You can view them by clicking on the name of the desired document.

🔓 Create 💽 🚭 Upload					Create v	vorkflow	Approve
Documents 🔺	Package	5					
All documents		Name	Nº	Document date ↓ Creation date	Туре	М	Status
My documents		Package 3	1710	05.01.2024 05.01.2024	Package of documents	0	Approval requested from recipient
Shared with me		Act	1436	31.12.2023 05.01.2024	Acceptance certificate	0	Approval requested from recipient
Checked documents		Invoice	1245	31.12.2023 05.01.2024	Invoice	0	Approval requested from recipient

*Important!* If you open any of the documents in the package, on the right side panel in the "Linked Documents" section, the package will be indicated. This is how you can determine that the document belongs to a specific package.





Now you can send the package to the next processing stage according to the specified route. To do this, click on the "airplane" icon.

Create Create					Create v	vorkflow	Approve
ocuments 🔺	Package	5					
All documents		Name	Nº	Document date ↓ Creation date	Туре	М	Status
My documents		Package 3	1710	05.01.2024 05.01.2024	Package of documents	0	Approval requested from recipient
Shared with me		Act	1436	31.12.2023 05.01.2024	Acceptance certificate	0	Approval requested from recipient
Checked documents		Invoice	1245	31.12.2023 05.01.2024	Invoice	0	Approval requested from recipient

fter performing this action, a message about sending the package will appear. In the "Status" column opposite the package and the documents included in it, the label "Processed" will appear, and in the "My Actions" column, the icon indicating the action completion will appear.

Tuokuge	Name	N <sup>2</sup>	Document date	Туре	м	Status	S /	A Sides	Sum i	E (	C	C	D	Exe	w. <b>≡</b> :	\$	Ŧ
0	Package 3		04.09.2023 04.09.2023	Package of documents	0	Processed	Аг / К I	Ar K					~			~	

.

# How to reject a package if an error is found in one of the package documents

Open the document in the package that needs to be rejected by clicking on its name.

Create 🚯 Upload					Create v	vorkflow	Approve
Documents A	Package	8					
All documents		Name	Nº	Document date ↓ Creation date	Туре	М	Status
My documents	>	Package 3	1710	05.01.2024 05.01.2024	Package of documents	0	Approval requested from recipient
Shared with me		Act	1436	31.12.2023 05.01.2024	Acceptance certificate	0	Approval requested from recipient
Checked documents		Invoice	1245	31.12.2023 05.01.2024	Invoice	0	Approval requested from recipient

On the right side panel, click the "Reject" button.

Main data	Comments		
🗌 Тестовый	документ.pdf		
<b>G</b> .			
Linked docum	ients		
1. Package 3			
Sign	Create workflow	Add final data	
Reject			

Specify the reason for rejection and click "Reject."

	Reject document	×
Comment (the reason for rejection	on) *	
	Reject	

The counterparty will receive a notification about the rejection of the document and, consequently, the package of documents with an indication of the rejection reason. In the "Status" column opposite the package and the documents included in it, the label "Processed" will appear, and in the "My Actions" column, the icon indicating the action completion will appear.





## How to delegate actions across a package

After opening the package, click on the "Delegate Action" button at the top of the mass action buttons panel.

Create Duploa	ıd	→ Delegate action	Create workflow	e Sign / Edit GD Link	Save -
Documents -	Packages				
	Name	Nº Document date ↓ Creation date	e Type M Status Sende	er Author Sides	\$
All documents	Package 3		Package of Pending for		^
My documents	TEST DOCUMENT.pdf	q234 16.01.2024 25.01.2024	Acceptance S Pending for		~
Shared with me Requests:	TEST DOCUMENT.pdf	10.01.2024 25.01.2024	Invoice   Pending for		~
to sign					

Specify the User ID to whom the action is delegated and click "Save."

Delegate action	×
Delegate	

At this stage, there will be no changes in the "Status" and "My Actions" columns opposite the package and the documents included in it.

Create 🚯 Uploa	d	→ Delegate action	Create workflow	Sign / Edit G5 Link	Save - Move -
Desuments	Packages				
Documents	Name	Nº Document dat ↓ Creation dat		Author Sides	\$
All documents	Package 3		Package of  Pending for		^
My documents	TEST DOCUMENT.pdf	q234 16.01.2024 25.01.2024	Acceptance   Pending for		~
Shared with me Requests:	TEST DOCUMENT.pdf	10.01.2024 25.01.2024	Invoice   Pending for		$\sim$
to sign					

However, when opening each document in the package, on the right side panel, it will be visible that the action on the document is delegated, but the ability to perform the action remains.



To view the route details in detail, press the "View Full Route" route icon on the right side panel next to the document in the package.



To view the route details in detail, press the "View Full Route" route icon on the right side panel next to the document in the package.





## Search for documents in the system

On the portal, there are two available search options – quick search by name or file number and extended search based on various document attributes in the system.

For quick search, enter the name/number of the required file partially or completely in the search field. While entering the data, the system will suggest options that match your query, indicating the name, number, and date of the file. You have the option to select a specific file by hovering over it and clicking on it.

ent name or document number Q DOCUMENT.ONLINE agr Extended search Agreement Date: 20.06.2023 Create 1 Upload Agreement Test\_word 1 Date: 05.05.2023 Agreement Test word 2 Documents A Document... Type Date: 05.05.2023 Г Mv... Sta ↓ Creation. Agreement All documents 09.09.2022 Date: 04.05.2023 09 09 2022 Agreement In i My documents Agreement 09.09.2022 Date: 04.05.2023 09.09.2022 Agreement In 1 Shared with me 09.09.2022 Requests: 09.09.2022 Pe test Agreement 09.09.2022 to sign test 09.09.2022 Agreement Ap to sign by stamp 09.09.2022 to approve Test word 09.09.2022 Up

Important! Quick search looks for files in the "All Documents" section.

#### The system will immediately open this file.



If you need all files that match the query, enter the file name completely and press the magnifying glass icon or "Enter." The system will generate a list of all files that match your query.

DOCUMENT.ONLINE	Document name or document agreement	0	ded search
Create Opload			
Documents A	rch results Create custo	om section based on this search crite	ria Download in CSV format
	Name	Ne	Document date ↓ Creation date
All documents	Agreement	1	20.06.2023 20.06.2023
My documents	Agreement	1	Comment date         Type           Creation date         Type           0.05.2023
Shared with me	-		
Requests:	Agreement	1	04.05.2023 Agreement 05.05.2023
to sign	Agreement Test wo	ork	05.05.2023 05.05.2023
to sign by stamp	Agreement Test wo	ord 2	05.05.2023
175 SP1979104			

back to Content

## **Extended document search**

On the portal, there are 2 search options – quick search by name or file number and extended search based on various document attributes in the system.

For advanced search, click on the down arrow icon " Extended search."

DOCUMENT.ONLINE	Doc	cument name or document num	Exten	ded search			C
Create Opload						Create workflow	Appro
Decumente t	Search	results Create custom section based on	this search crite	ria Download in CS	V format		
	Create       ▲ Upload       ✓ Create workflow       ✓ Approximation         Imments ▲       Search results       Create custom section based on this search criteria       Download in CSV format         Imments ▲       Imments ▲       Imments ▲       Document date 1 Creation date       Type       My       Status       Sender						
All documents		Agreement	1	20.06.2023		Signature req	

In the extended search window, choose the attribute by which you want to find documents:

	Extend	ed search		×
Section			*	
Туре			~	
My identifier			~	
Name agreement				
Number		Base document number		
Workflow status	My actions		*	
Author email/identifier	Sender emai	Videntifier		-
Receiver email/identifier				
From sum	\$	То	¢	
Sides +				
Identification code	Name			-
Reset search			Search	

- section;
- document type;
- my identifier;
- · document author/sender identifier;
- recipient identifier;
- · document date;
- information about parties;
- etc.

For example, let's consider two situations. Suppose you need to find:

1. All incoming Agreements from client

	Extend	ed search		×
Section			Ŧ	
Agreement ×			x v	
My identifier			~	
Name				
Number		Base document number		
Workflow status 👻	My actions		~	
Author email/identifier lawyer_test@document.online	Sender email	/identifier		
Receiver email/identifier				
From sum	¢	То	¢	
Sides +				
Identification code	Name			
Reset search			Search	_

#### 2. All documents in a status waiting for approval

	Extende	d search		×
Section All documents			•	
Туре			~	
My identifier			~	
Name				
Number		Base document number		
Workflow status 👻	My actions Pending Appro	oval	*	
Author email/identifier	Sender email/	dentifier		
Receiver email/identifier				
From sum	¢	То	¢	
Sides +				
Identification code	Name			
Peast seemb			Coordh	



Upon successful search, you will see a list of found documents and possible functions – "Create a section based on this search criterion" and "Download in CSV format."

DOCUMENT.ONLINI	E Document name or document nu	m Q Exte	nded search			
Create Upload					Create workflo	w App
Documents A	Search results Create custom section b	based on this search cri	teria Download in CSV	/ format		
	Name	Nº	Document date ↓ Creation date	Туре	My Status	Sender
All documents						

The "Create a section based on this search criterion" function is similar to creating a new subsection in the "My Sections" section, but the "Create Section" modal window is pre-filled with the criteria used for the search.

The "Download in CSV format" function allows you to download documents as a list to your computer in Excel for further work with the list, for example, to create a register of documents for a specific period.



## Creating a document report

To generate a report on documents, you can use advanced search to filter documents. To do this, click on the arrow icon "Advanced Search" at the top.

DOCUMENT.ONLINE	Do	cument name or document num Q	Exten	ded search			č
Create Opload						Create workflow	Appro
Decumente 4	Search	results Create custom section based on th	nis search crite	eria Download in CS	V format		
Documents       Search results       Create custom section based on this search criteria       Download in CSV format         Image: Im	Sender						
All documents		Agreement	1	20.06.2023		Signature req	

In the opened window, specify the necessary criteria to form the report. After that, click the "Search" button.

	Extend	ed search		×
Section All documents				-
Туре			```	~
My identifier			``	/
Name				
Number		Base document number		_
Workflow status	My actions Pending App	roval		*
Author email/identifier	Sender email	/identifier		_
Receiver email/identifier				
From sum	0	То		0
Sides +				
Identification code	Name			_
Reset search			Search	1

The system will filter your documents based on the specified criteria.

To create a report on these documents, click "Download in CSV format" at the top.

DOCUMENT.ONLIN	EDocument name or document	num Q Ext	ended search			
Create Gupload					Create work	cflow App
Documente 🔺	Search results Create custom section	reate custom section based on this search criteria Download in CSV format				
	Name Name	Nº	Document date ↓ Creation date	ype	My Status	Sender
Documents						

Subsequently, a report will be downloaded based on the found documents.

## Sorting documents in the system

On the platform, you can create a custom section with documents filtered based on specific criteria (filter).

*Important!* Custom sections can be used not only to organize documents with the ability to generate standard reports on section documents in the future (<u>see section "Creating Standard Reports on</u> <u>Documents"</u>). Custom sections also provide the ability to set up <u>automatic delegation</u> and <u>workflow</u> <u>of documents within the entire section</u>.

		n contion ocument name or documen		n tha " Extended search	, " io		nov	t to the	"My	Section	ons" t	itle.
Create Opload							<					
Documents -	All doo	cuments		Document								
All documents		Name	N*	↓ Creation	Туре	My	Status					
My documents		Test		23.09.2022 23.09.2022	Agreement	8	Uploaded					
Shared with me		Акт анулювання		09.09.2022 09.09.2022	Revocati		Pending					
Requests:		Акт анулювання		09.09.2022 09.09.2022	Revocati	٩	Pending					
to sign to sign by stamp		test	1	09.09.2022 09.09.2022	Agreement	0	In the pr					
to approve		test	1	09.09.2022 09.09.2022	Agreement	0	In the pr					
Checked documents		test	1	09.09.2022 09.09.2022	Agreement	$\odot$	Pending					
<ol> <li>Packages</li> </ol>		test	1	09.09.2022 09.09.2022	Agreement		Approva					
<ol> <li>My packages</li> </ol>		Test word		09.09.2022 09.09.2022			Uploaded					
Archive		TD_PDF_1 (2).pdf		09.09.2022 09.09.2022	Agreement	$\odot$	Pending					
Trash		TD_PDF_1_(2).pdf		09.09.2022 09.09.2022	Agreement	$\odot$	Pending					
Problem signs	/-	TD_PDF_1 (2).pdf		09.09.2022 09.09.2022								
My sections +				09.09.2022 09.09.2022			Restrict					
> Test documents		Test document	1	09.09.2022 09.09.2022	Agreement	0	Processed					

In the section creation window, specify the section name and choose filters according to which documents will be included.

		Create	esection		:
1.Search criteria				2.Workflow setting	js
Agreements					- 1
Section					
Agreement ×				× ~	
My identifier				~	
Name					_
Number			Base document number		_
Workflow status	*	My actions			-
Author email/identifier		Sender email/id	entifier		_
Receiver email/identifier					_
From sum		0	То	6	0
Sides +					
Identification code		Name			
			CREAT	E WORKFLOW	SAVE



If your account is linked to multiple identifiers, meaning multiple accounts, you can create custom sections separately for each identifier (learn more about using identifiers <u>here</u>). In the "My Identifier" field, choose the relevant account whose documents should be included in your section. For example, if you have an archive mailbox among your identifiers, select it to create a separate section for archival

	Create section			
1.Search criteria		<b></b>	2.Workflow settings	
Agreements				
Section			*	
Agreement ×			× ~	
d.kotovsky@document.online ×			× ^	
Select all identifiers				
<ul> <li>Search</li> <li>d.kotovsky@document.online</li> </ul>				
djonic007@gmail.com			-	

If you need to set up a route or automatic redirection for all documents in this section, click "Workflow settings."

Details of these functions are covered in the sections below under the titles <u>"Automatic Sending of</u> <u>Documents (only for new documents)</u> and <u>"Redirection of Documents, for example, in case of</u> <u>vacation."</u>

Setting up access is optional for creating a section.

The section you create will be displayed within the "My Sections" section.

To edit or delete a section, click on the "three dots" icon that appears when hovering over the name of the created section.

You can also create a subsection within a section on the portal. Details of this function are discussed below under the title "Creating a Subsection in a Section."

Trash	+	Create subsection	
Problem signs	1	Edit section	<u>st work</u>
My sections +	×	Delete section	<u>st word 2</u>
> Test documents		Agreement 1	Test_word 1



## Creating a subsection in a section

To create a subsection in a previously created section, click on the "three dots" icon that appears when hovering over the name of the created section and select "Create Subsection."

In the subsection creation window, specify the subsection name and choose additional filters according to which documents will be included here.

*Important!* The subsection will apply the search settings of the section and additionally selected subsection filters. This means that all documents entering the subsection will also be located in the top-level Section.

	Create	esection	
1.Search criteria		2.Workflow setting	35
Agreements			_
Section		-	-
Agreement ×		× ~	
My identifier		~	
Name			_
Number		Base document number	_
Workflow status	My actions		-
Author email/identifier	Sender email/ide	antifier	_
Receiver email/identifier			_
	0	То	0
From sum			
From sum Sides +			

If you need to set up a route or automatic redirection for all documents in this subsection, click "Workflow settings."

Details of these functions are covered in the sections below under the titles <u>"Automatic Sending of</u> <u>Documents (only for new documents)"</u> and <u>"Redirection of Documents, for example, in case of</u> <u>vacation.</u>"

#### Setting up access is optional for creating a subsection.

The subsection you create will be displayed within the "My Sections" section under the previously created section. To expand the list of subsections in the section, click on the "arrow" icon next to the section name

Problem signs	
My sections	+
✓ Test documents	
> Test agreements	

You can create an unlimited number of subsections in a section and subsections in subsections, and each of them can have its own approval route configured.

*Important!* If there is an approval route set in the section or subsection, and the document falls under the configured subsection search parameters, only the approval workflow of the subsection will be applied to the document.

*Important!* If, according to the search parameters, a document falls into several sections with configured access parameters, the document will be subject to the approval workflow created last in the system. In the other sections, there will be an "exclamation mark" icon with information that no route is configured for the document from that section.



## Automatic sending of documents (only for new documents)

To set up automatic sending of documents, you need to create a custom section with documents filtered by specific criteria.

Click on the "+" icon next to the "My Sections" title.

DOCUMENT.ONLINE	Do	ocument name or document num	٩	Extended se	earch			
Create Dpload								<
Documents -	All doo	uments						
All documents		Name	N®	Docum 1 Creat		Туре	My	Status
My documents		Test		23.09.2 23.09.2		Agreement	0	Uploaded
Shared with me		Актанулювання		09.09.2 09.09.2		Revocati	٩	Pending
Requests:		Акт анулювання		09.09.2 09.09.2		Revocati	٩	Pending
to sign		test	1	09.09.2 09.09.2		Agreement	0	In the pr
to approve		test	1	09.09.2 09.09.2		Agreement	0	In the pr
Checked documents		test	1	09.09.2 09.09.2		Agreement	$\odot$	Pending
i Packages		test	1	09.09.2 09.09.2		Agreement		Approva
i) My packages		Test word		09.09.2 09.09.2				Uploaded
Archive		TD_PDF_1_(2),pdf		09.09.2 09.09.2		Agreement	$\odot$	Pending
Trash		TD_PDF_1 (2),pdf		09.09.2 09.09.2		Agreement	$\odot$	Pending
Problem signs		TD_PDF_1 (2),pdf		09.09.2 09.09.2				
My sections +				09.09.2 09.09.2				Restrict
> Test documents		Test document	1	09.09.2 09.09.2		Agreement	0	Processed

In the section creation window, specify the section name and choose filters according to which documents will enter it. Click on "Workflow settings."

	Create section	>
1.Search criteria	2.Workflow settings	
Agreements		1
Section	*	
Agreement ×	X V	
My identifier	~	
Name		
Number	Base document number	
Workflow status	My actions 👻	l
Author email/identifier	Sender email/identifier	
Receiver email/identifier		
From sum	© 0	
Sides +		
Identification code	Name	
	CREATE WORKFLOW SAV	Е

Choose the type of access setting as "Workflow settings".

	Create section	
1.Search criteria	2.Workflow settings	
Test section workflow		_
Optional settings: create a workflow to apply	y it to all documents in this section.	
Colored trans of samelellour		

Create approval workflow for the section, and they will automatically be assigned to all new documents that meet the criteria of the section. Click "Save."

	Create section	
1.Search criteria		2.Workflow settings
Fest section workflow		
Dptional settings: create a workflow to ielect type of workflow Create workflow	apply it to all documents in this section	on. 💌
Група 1		Add group
iroup name * "pyna 1		$\begin{array}{c} \text{Group order} \\ \leftarrow 1 \rightarrow \end{array}  \textcircled{\blacksquare}$
Note Gend for Approval	<ul> <li>By every u</li> </ul>	iser of the group 💌
The recipient is indicated in the do Norkflow participants:	cument attributes (i)	
Norkflow participants:	cument attributes (j)	~

*Important!* All documents that meet the specified criteria will appear in the section. However, approval routes will be automatically assigned only to new documents entering this section.



## Forwarding of documents, for example, in case of vacation

To set up automatic documents forwarding, you need to create a custom section with documents filtered by specific criteria.

Click on the "+" icon next to the "My Sections" title.

DOCUMENT.ONLINE	Do	cument name or document num	۹ 🕞	tended search			
Create Dupload							<
Documents A	All doc	uments					
All documents		Name	N*	Document ↓ Creation	Туре	My	Status
My documents		Test		23.09.2022 23.09.2022	Agreement	0	Uploaded
Shared with me		Акт анулювання		09.09.2022 09.09.2022	Revocati	٩	Pending
Requests:		Акт анулювання		09.09.2022 09.09.2022	Revocati	٩	Pending
to sign		test	1	09.09.2022 09.09.2022	Agreement	0	In the pr
to approve		test	1	09.09.2022 09.09.2022	Agreement	0	In the pr
Checked documents		test	1	09.09.2022 09.09.2022	Agreement	$\odot$	Pending
(i) Packages		test	1	09.09.2022 09.09.2022	Agreement		Approva
(i) My packages		Test word		09.09.2022 09.09.2022			Uploaded
Archive		TD_PDF_1.(2).pdf		09.09.2022 09.09.2022	Agreement	$\odot$	Pending
Trash		TD_PDF_1_(2).pdf		09.09.2022 09.09.2022	Agreement	$\odot$	Pending
Problem signs		TD_PDF_1 (2).pdf		09.09.2022 09.09.2022			
My sections +				09.09.2022 09.09.2022			Restrict
> Test documents		Test document	1	09.09.2022 09.09.2022	Agreement	0	Processed

To do this, click on the "+" icon next to the "My Sections" title.

For example, if you need to delegate document actions to your colleague during your vacation, choose the following filters to create the section:

- Section: Shared with me
- Status: Pending for processing
- Vacation period: Created date from ... to ...

You can also specify additional parameters, such as Document Type or Email/Sender Identifier, if necessary. Click "Workflow settings."

*Important!* If you want to forward packages of documents for execution, choose the filter "Section - Packages" instead of "Section - Shared with me."

	Create sect	ion		
a			2.Workflow se	ttir
<i>(</i>				
				¥
	·			
			S.	<
	Base	documer	nt number	
ngŤ	My actions			¥
r	Sender email/iden	tifier		
fier				
	© To			•
	Name			
c)	+			
	Value			
te)	+			
	Value			
۲	to 2/7/2024			
۲	to			
	to			
۲	to	۲		
	r fier c) te)	Base Base Base Base Base Base Base Base Base Base Base Base Base Base Particular Base Particular	Base docume Base docume My actions r Sender email/identifier fier Name N	a 2.Workflow se

Choose the type of access setting as "Workflow settings" and the action as "Delegate." Click "Add User."

Enter the email of the user to whom the actions on the documents of this section will be delegated. This feature is convenient, for example, during business trips or vacations when there is a need to process incoming documents. Click "Save."

Enter the email of the user to whom the actions on the documents of this section will be delegated. This feature is convenient, for example, during business trips or vacations when there is a need to process incoming documents.

Click "Save."

	Create section
1.Search criteria	2.Workflow settings
Test section workflow	
Optional settings: create a workflow to ap	ply it to all documents in this section.
Select type of workflow Create workflow	•
Group 1	Add group
Group name * Group 1	Group order ← 1 → ■
Note	
Send for Delegation	
The recipient is indicated in the docur Workflow participants:	ment attributes (j)
Email/Identifier* lawyer_test@document.online	Identification code Personal code
Email/Identifier *	Identification code Personal code

*Important!* All documents that meet the specified criteria will appear in the section. However, automatic forwarding will only work for new documents entering this section.



## Creation of standard reports on documents

Creating standard reports for documents is convenient when you need to generate multiple reports with different parameters. To avoid specifying these parameters each time in the advanced search, create relevant sections corresponding to the required reports.

The process of creating a section is explained in the section above titled "Sorting Documents".

When you need to generate a report, go to the respective section and click the Extended search button.

DOCUMENT.ONLIN	E Document name or document num	Q Exter	ided search	č
Create  Upload				Create workflow
Documents 🔺	Search results Create custom section base	d on this search crit	eria Download in CSV format	
	Name Name	Nº	Document date Type	My Status Sender
All documents	Agreement	1	20.06.2023	Signature req

In the search window, all parameters of the section you created will already be filled in. You can then edit specific search criteria (e.g., set a new criterion like "Pending Approval"). After that, click "Search."

	Extended search	×
Section All documents		-
Туре		$\sim$
My identifier		~
Name		
Number	Base document number	
Workflow status	My actions Pending Approval	•
Author email/identifier	Sender email/identifier	
Receiver email/identifier		
From sum	Э То	0
Sides +		
Identification code	Name	
Reset search		Search

A list of documents that meet the specified filters will appear. To generate a report, click "Download in CSV format," and a list of found documents with all the columns displayed on the screen will be downloaded to your computer.

DOCUMENT.ONLIN	E Document name or document num, Q Extended search	
Create Upload		Create workflow
Documents A	Search results Create custom section based on this search criteria Download in CSV format	
	□ Name N <sup>a</sup> Document date ↓ Creation date Type	My Status Sender
All documents		



## Bind additional identifier

If you have multiple accounts or several email addresses registered in the Document.Online system and want to work with all documents in a single account, use the functionality of binding an additional identifier.

**An identifier** is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

*Important!* When working with documents of added identifiers, you will have access to all functions except editing data on the documents.

	Your identifiers: (i)	
	Add Notification settings	
	Add identification code	
	Emails:	
	account1@document.online	
Email: account1@document.online	account3@document.online	Х
Phone.011-111-11-11		
Add chat with Document.Online		
Edit profile		
Log out		

To link a new identifier, click the "Add" button in the "Your Identifiers" section.

In the dialog box that opens:

1. Specify the email address (or list of addresses separated by commas) of the documents you want to see in your account.

2. Choose the level of access you want to have with the added accounts: "Full (all actions with documents)" or "View only."

3. Click the "Add" button.

*Important!* Documents of added identifiers will be accessible in your account after confirmation of the binding by the users of the added email addresses.

Add emails	×
We will send an email message to the specified email(s) and ask to confirm your request for binding Emails	
account2@document.onlline  Contrast email address(es) you want to bind to your profile (multiple emails should be separated by  Corrinas) Access level	
Only viewing	

4. The identifiers you added will appear in the list with the status "Not confirmed" (symbol "?" before the identifier name).

5. If an added identifier does not confirm your request for a long time, resend the request by clicking on the envelope icon.



4. The identifiers you added will appear in the list with the status "Not confirmed" (symbol "?" before the identifier name).

5. If an added identifier does not confirm your request for a long time, resend the request by clicking on the envelope icon.

6. After confirmation of the binding by the identifier, the identifier's status will change to "Identifier active."

Your identifiers: (i)	
Add Notification settings	
Add identification code	
Emails:	
account1@document.online	
account3@document.online	Х
? account2@document.onlline	X 🖂
Only viewing	

From this moment, your account will display not only documents that were created or sent to you but also all documents created or sent to the linked identifier.

## Deleting an additional identifier

**An identifier** is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

If, for some reason, you no longer need to receive documents from an added identifier, you can delete it by clicking the "X" icon next to the relevant identifier.



You can delete both active and unconfirmed identifiers.



## Confirmation of actions by the binding identifier

**An identifier** is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

#### 1. Confirmation of Binding Your Account to Another User

If your account (or email) has been linked to another account in the Document.Online system, you will receive an email requesting confirmation of this action. The email will specify the email of the account that wants to access your documents and the access level—either "all actions" with documents or only "view."

To grant permission to access your documents, click the "Confirm Binding" button.

Dear User!
Confirmation of email binding. User d.kotovsky@document.online requests permission to bind your profile to his/her profile. After your confirmation User d.kotovsky@document.online will get full access to all your
documents(both created/uploaded by you and shared with you). Confirm email binding
https://document.online/app//link/addclaim?accountid=c1de9a93-491b-4d2b-9adf- 1c0ce629deab&claimid=6de295e1-5cf4-447d-bff2-107d6899fa46&otp=68dc44c5- aa68-4250-bf83-781dd6a50cc9 Sent by
Document.Online
If you have any questions, please, contact us via phone 099 499 29 11 © 2022 Document.Online or e-mail info@document.online

You will be redirected to document.online and see a notification of the successful binding of your email. Click "OK."





## Search for documents belonging to a certain identifier

An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

Go to 'Extended search' by clicking the arrow in the top search panel.

DOCUMENT.ONLIN	E Document name or document n	num Q Exten	ded search		č
Create Dpload				Create workfl	ow Appro
Decumente	Search results Create custom section	based on this search crite	eria Download in CSV format		
	Name Name	Nº	Document date ↓ Creation date Type	My Status	Sender
All documents	Agreement	1	20.06.2023	Signature req.	

In the 'Extended search' window, use the criterion 'My Identifier.'

	Extended search	×
Section		•
Туре		$\checkmark$
My identifier		$\sim$

Choose the identifier for which you need to find documents and click the 'Search' button."

Extended search	>
Section	~
Туре	~
My identifier	^
Select all identifiers	-
Q Search	
account1@document.online	



## Setting up notifications from binded IDs

An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and gain access to all documents belonging to these identifiers. This is very convenient if you have multiple accounts (you can combine them and work in a unified space) or if you need to monitor the work of subordinates.

If you want to receive notifications about actions on documents from linked identifiers, click on the "Notifications settings" button in your profile window:



#### In the opened window:



1. "Choose an identifier to configure" - a user/identifier for which actions will trigger notifications. Choose one identifier from the list or check the box "Apply settings to all identifiers" if you want to configure notifications for all linked identifiers at once.

2. "Select a contact for notifications" - the user/identifier who will receive email notifications configured in the first step. This can be your account or any other from the list of identifiers.





3. Mark events for which you want to receive email notifications" by placing or removing a checkmark next to the corresponding document action: Choose events like "Document Created," "Document Approved," etc.

	Notification settings	×
Ø	Select identifier	
	Select contact to send notifications to	
3	Check all the events you want to be notified about	
	Vew document sent for signature	
	New document sent for approval	
	New document sent for review	
	Document has been rejected	
	My workflow is completed	
	Deadline for performing the action has passed	
	New comment to document	
	Restricting access to a document	
	Expiration deadline reminder	
4	Language of notifications	
	Save	

4. Select the language of notifications in which you want to receive messages via email.

5. Click the "Save" button.



## System notifications in the account

As changes occur to documents in the system in real-time, notifications will appear next to the bell icon at the top of the screen:





Clicking the bell icon will prompt the system to display notifications with information about the incoming action:



By clicking on a specific notification, you will open the corresponding document:



Clicking on the "three dots" located next to the notification opens a window to clear the notification



Additionally, upon refreshing the browser page, all previously sent notifications will be cleared.



## Setting up notifications in Telegram

You have the option to use Telegram as a communication channel with Document.Online. To do this, you need to connect to our chatbot, where notifications from the service will be sent.

Click on the profile picture, and then on 'Profile Settings.' and click 'Add chat with Document.Online.'

	Your identifiers: ()	
	Add Notification settings	
	Add identification code	
	Emails:	
	account1@document.online	
Email: account1@document.online	account3@document.online	Х
Phone.011-111-11-11		
Add chat with Document.Online		
Edit profile		
Log out		

Use the 'Send message' button if you have the Telegram app installed on your computer or click 'Open in web' to access the web version of the messenger.

Telegram	
	Don't have Telegram yet? Try it now! >
	Document Online @DocumentOnline.bot

Click 'start.' The chatbot is already connected.





Also, after linking Telegram, a corresponding message will be displayed in 'Profile Settings.'

	Your identifiers: (j)	
	Add Notification settings	
	Add identification code	
	Emails:	
	account1@document.online	
Email: account1@document.online	account3@document.online	Х
Phone.011-111-11-11		
Add chat with Document.Online Chat with Document.Online created		
Edit profile		
Log out		

Now you need to configure which notifications will be sent to Telegram. Click on the 'Notifications settings' button in your profile window:

	Your identifiers: 🕕	
	Add Notification settings	
	Emails:	
	account1@document.online	
Email: account1@document.online	account3@document.online	Х
Phone.011-111-11-11		
Add chat with Document.Online		
Edit profile		
Log out		
	J	

In the opened window:



1. 'Select an identifier to configure' - choose a user/identifier for which actions will trigger notifications. Choose from the list or check 'Apply settings to all identifiers' if you want to set up notifications for all linked identifiers at once.

An identifier is a user account that can be linked to your account. You can add an unlimited number of identifiers to your account and access all documents associated with these identifiers. This is very convenient if you have multiple accounts (they can be combined and work in a unified space) or if you need to monitor the work of subordinates.

2. 'Select a contact for notifications' - Your Telegram.

Notification settings	×
Select identifier	
2 Select contact to send notifications to	
Telegram: @Penis Rodo	

2. 'Uncheck events for which you want to receive email notifications' by checking or unchecking the box next to the corresponding document action:

	Notification settings	×
0	Select identifier	
	Select contact to send notifications to	
3	Check all the events you want to be notified about	
	New document sent for signature	
	New document sent for approval	
	New document sent for review	
	Document has been rejected	
	My workflow is completed	
	Deadline for performing the action has passed	
	New comment to document	
	Restricting access to a document	
	Expiration deadline reminder	
4	Language of notifications	
	Save	

4. Select the language of notifications in which you want to receive messages via email.

5. Click the "Save" button.

## Confirmation of registration in the service by the domain administrator

On the portal, there is a function for administrator confirmation of user registrations working under a specific domain.

To access the administrator settings, click on the user icon and choose 'Administrative Settings' from the dropdown menu.

DOCUMENT.ONLIN	E Document name or document num Q	Extended search	☆ +38 067 419 2 ● +38 099 499 2	19 11 @ EN 🕜 📌	rଛdocument.onl	D•
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Documents -	All documents				Company settings	
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Click on the gear icon in the 'Domain Settings' section.

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Documents -	Administrative settings				
	Domain settings:				
<ol> <li>Packages</li> </ol>					
<ol> <li>My packages</li> </ol>	Domain: document.online 💉 🔅				

In the 'Registration Confirmation Email Recipient' section, choose 'Administrator' and enter the administrator's email below.

Domain settings	×
(i) These settings will be applied to <b>all users</b> in the domain.	
Domain: document.online	
Setting of receiver of registration confirmation letter domain users	
<ul> <li>Receiver of registration confirmation letter for users</li> </ul>	_
Administrator	
To email address: Admin@document.online	]
Entered emain has to be a member of the domain document.online	
Registration and authorization of users	
Allow registration and authorization of users only through LiveID	
Access to domain users' documents	
<ul> <li>E-mail of the administrator who has access to the domain documents</li> </ul>	
Enter the user's e-mail (one, or after a comma - several) Entered emain has to be a member of the domain document.online	_
<ul> <li>Level of access to domain user's documents</li> </ul>	
Read	~
Uploading domain documents	_
<ul> <li>Connector for receiving documents of domain users</li> </ul>	
Connector for receiving documents of domain users	_

After completing the registration procedure: The user who registered will receive an email to confirm their email address.

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Development		
Dear User!		
Registration on the Dokument.Onlin registration.M	Portal. Please confirm your second se second second seco	our email to complete your
Approve		
https://identity-staging.document.online/Co code=CfDJ8BQXc%2FbRyGJJmBhUF2ebk %3D%3D&ui_locales=uk		6ea059-1914-4836-8d9e-23adb3025fd5& mlyGE0lqJzRXhCpiiz9izpeFuMY62kRHJ2Fw%2Ei
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back to	
Content	

If you have any questions, please, contact us via phone 099 499 29 11 © 2022 Document.Onli or e-mail info@document.online 2. After the user confirms their email, the administrator will receive a confirmation registration email to their email address.

3. Once the administrator clicks on the 'Confirm' button, the user will be registered.



4. The user will receive a notification that the registration was successful, and they can log in to the system.



Dear User!

Registration on the Document.Online portal. The account has been successfully verified by the administrator. You can now log in.



If you have any questions, please, contact us via phone 099 499 29 11 © 2022 Document.Online or e-mail info@document.online

## Control and blocking of user access to the system

The domain administrator has the ability to both confirm the registration of users for a specific domain and block them. The domain administrator can view all users registered under the company's domain.

To access the administrator settings, click on the user icon and choose 'Administrative Settings' from the dropdown menu.

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Documents -	All documents					Company settings	
Documenta .	Name Name	N2 Document Type	My Status Sender Author Sides	My identifier Docume S			E 🝸
Packades					- 0	Profile settings	

Next to each user, there is a 'Block' button. If needed, the domain administrator can block specific users."







# DOCUMENT.ONLINE

info@document.online