



atlas Firma

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ATLAS Firma User Guide

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- Firma is approved for **Unclassified** and **Sensitive But Unclassified (SBU)** information. Users are **STRICTLY PROHIBITED** from uploading SBU/NOFORN or Classified information.

ATLAS FIRMA

ATLAS Firma is an enterprise cloud-hosted digital signature tool developed by the ADG. The application provides an interface for creating a workflow around the signatures for a form, and then routes the form to the assigned parties for digital signatures with the result being a completed form available for download.

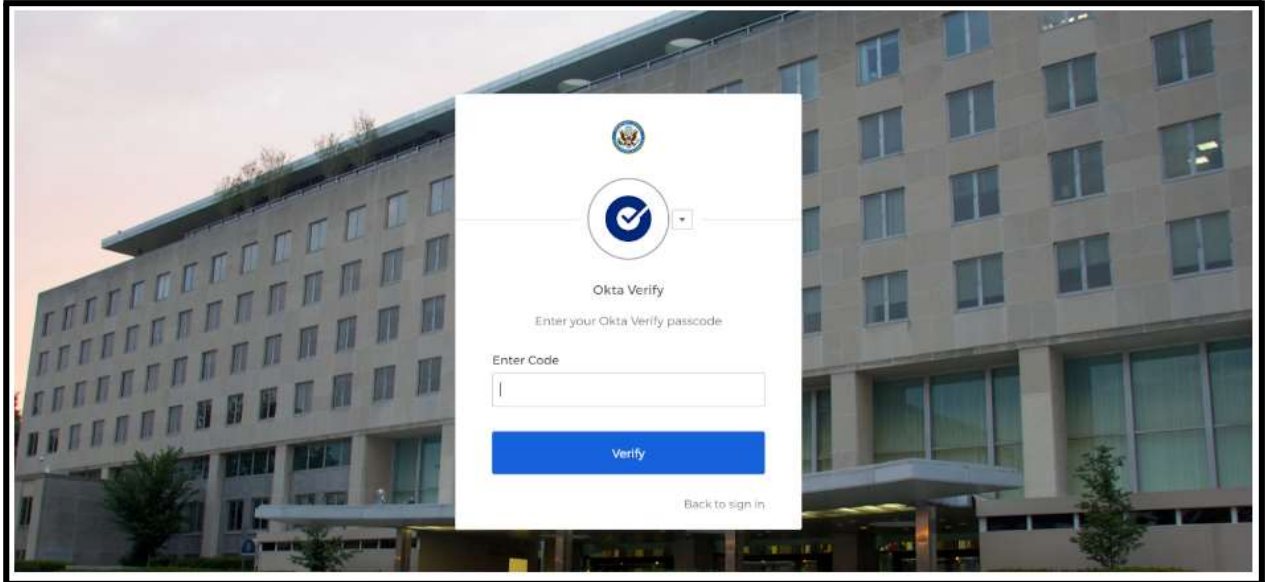
- ATLAS Firma will only accept **pdf** file formats.
- For all other file formats, users must first **save the file as a pdf** to successfully upload the form in ATLAS Firma.

ACCESSING ATLAS FIRMA

ATLAS Firma is available online at **firma.state.gov** and accessible via Okta Verify.

Users can sign in from any web browser by logging in via **Okta Verify**. (If you have SAFE, you have an Okta Verify account.) Don't have an Okta account? Reach out to post's IMO section or submit a request to **adg-support@state.gov**.

Go to **firma.state.gov** and enter your Okta Verify username and password. Then, you will be asked to enter a code. Open the Okta Verify app on your smartphone, find the six-digit number for login.state.gov and enter it into the website. Be quick—the number changes every 30 seconds.

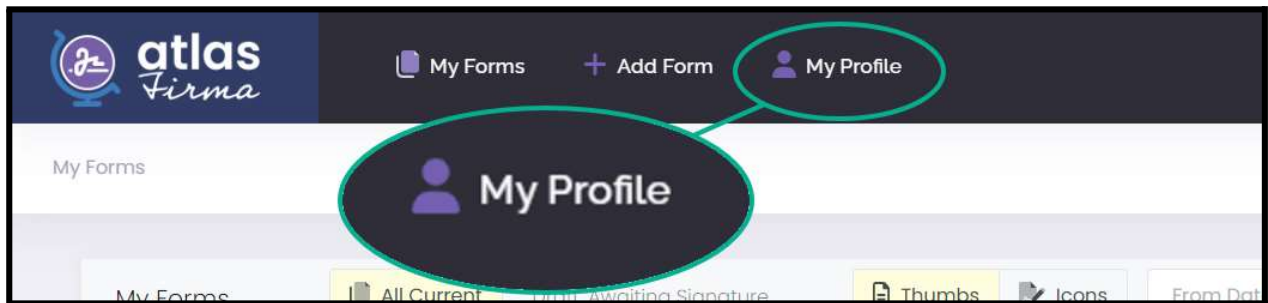


Once signed in, your browser will take you to ATLAS Firma automatically.

WELCOME TO ATLAS FIRMA!

EDITING YOUR ATLAS FIRMA PROFILE

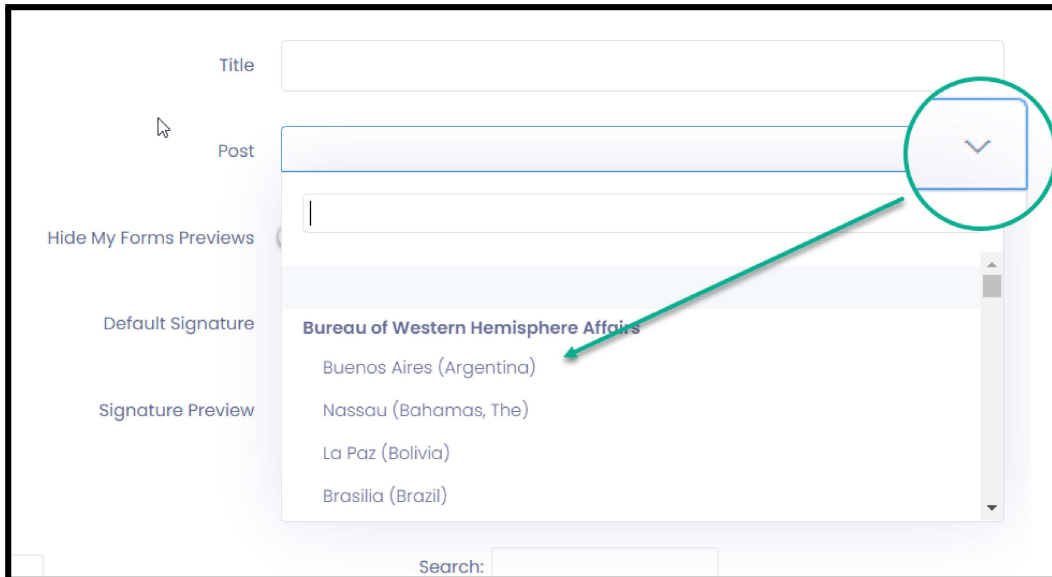
Select 'My Profile.'



The user's **Last Name**, **First Name**, and **Initials** will auto populate. However, the user **Middle Name**, **Title**, **Post**, various signature styles, and **Favorites** can all be edited in the 'My Profile' section.

To edit the **Middle Name** or **Title**, simply type the information into the editable space next to the appropriate section.

Use the dropdown box to edit the **Post**.



CREATING AND EDITING A SIGNATURE

Users can select from five styles of signature, ranging from plain text to initials only.

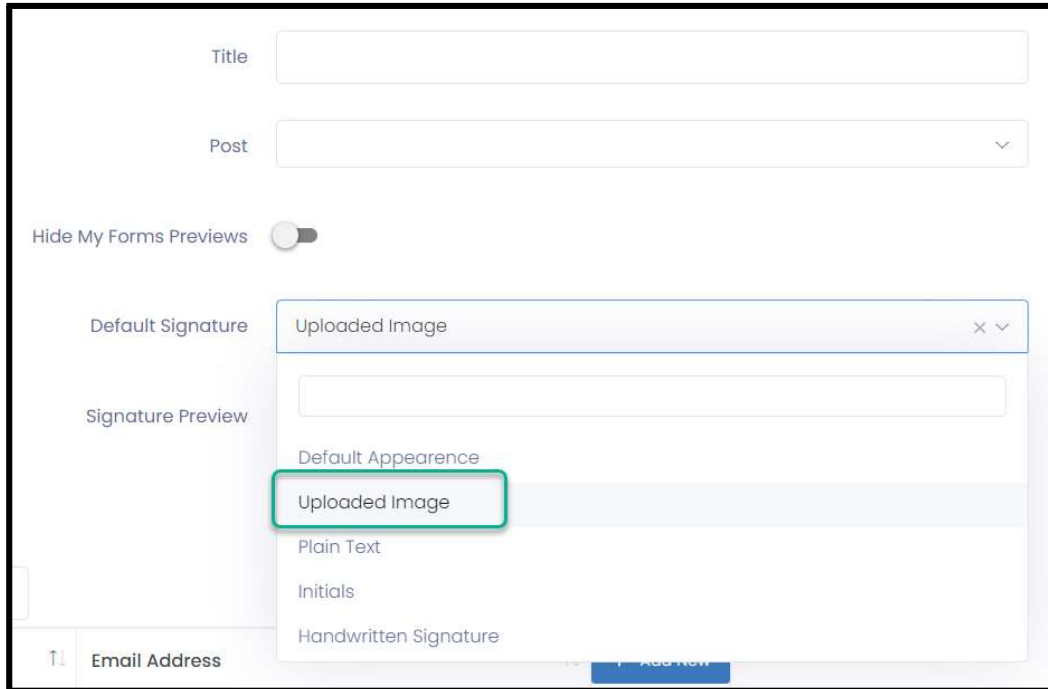
- The **Default Appearance**, **Plain Text**, and **Initials** are preconfigured for each user. If a signature image or handwritten signature is preferred, users can add and edit these signatures in the 'My Profile' section.

ADDING A PERSONALIZED SIGNATURE

There are two methods for personalizing signatures. Users can either upload an image or create a digital handwritten version.

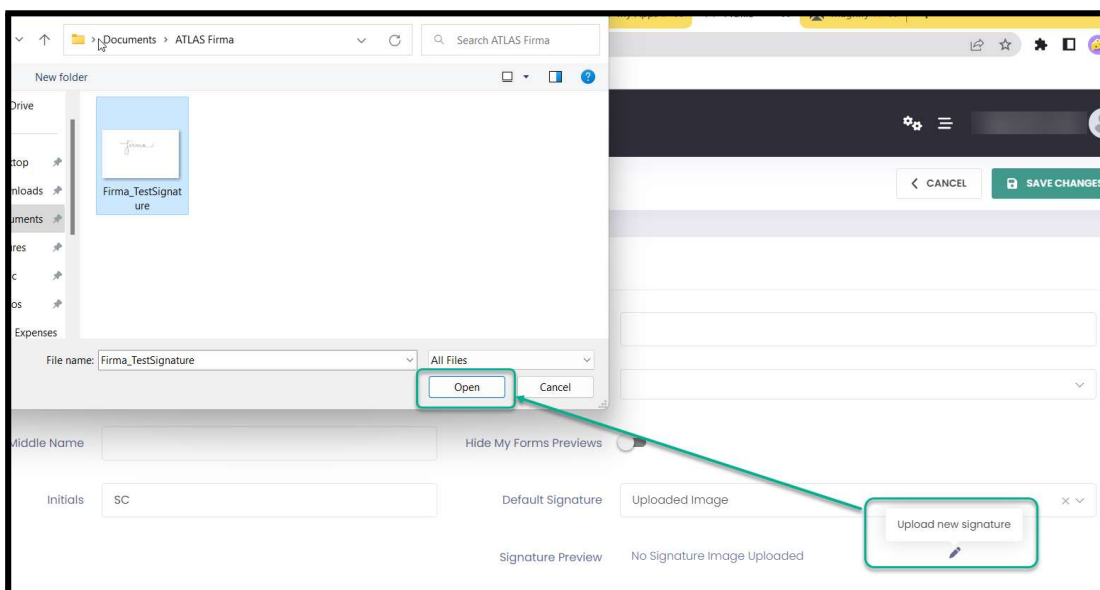
UPLOADED IMAGE

To upload an image, select **Uploaded Image** from the 'Default Signature' dropdown.



The 'Signature Preview' status now displays 'No Signature Image Uploaded.'

Select the **Pencil** icon to upload a new signature image. Select the image from the File Explorer and click **Open**.



The uploaded image will appear in the photo editor. Zoom, crop, and edit until the signature is ready for import. Then, select 'OK.'

- Be sure to adjust the signature image to fit inside the editor's white box! Then, press 'OK.'



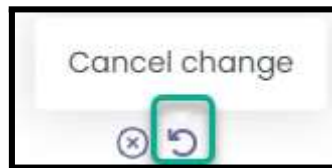
- For a quick video of the signature editing process, click [here](#).

The uploaded image can now be seen in the 'Signature Preview' and is ready for use.

If the signature is not correct or doesn't look quite right, users can also remove the signature and start over with a new image by selecting the **Remove signature** icon.

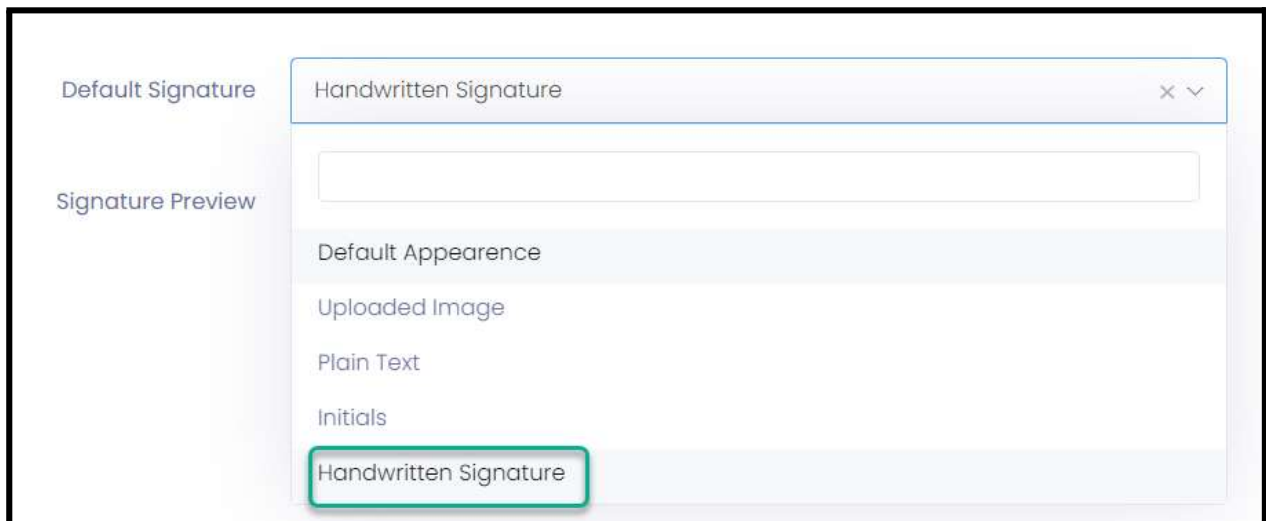


If a user changes the signature but prefers the previous version, users may select the 'Cancel Change' icon which allows the user to revert back to the previous version.

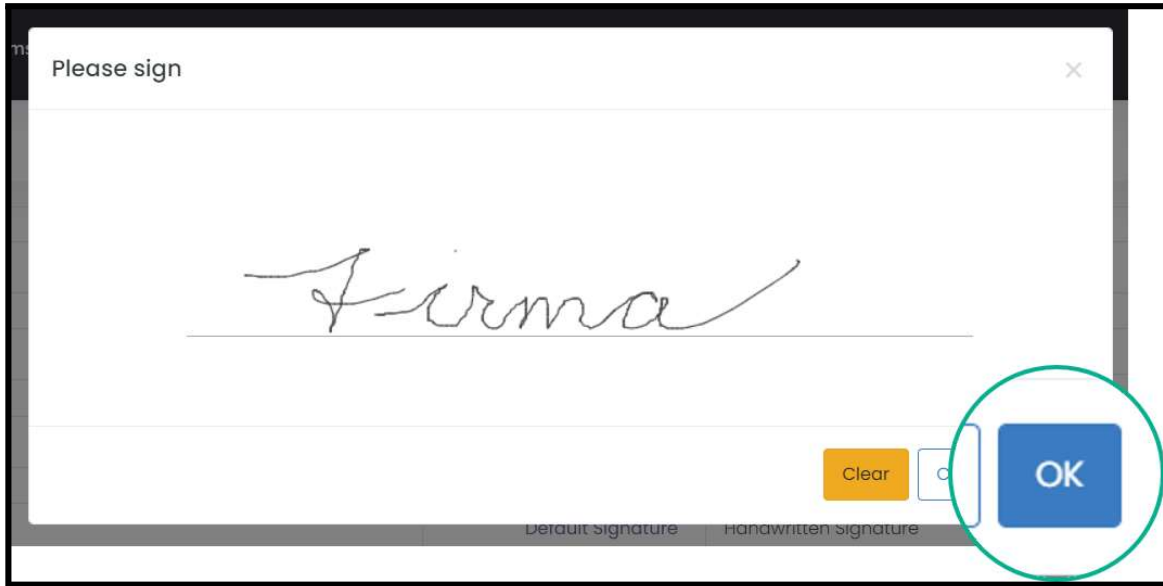


HANDWRITTEN SIGNATURE

To manually create a signature, select **Handwritten Signature** from the 'Default Signature' dropdown.

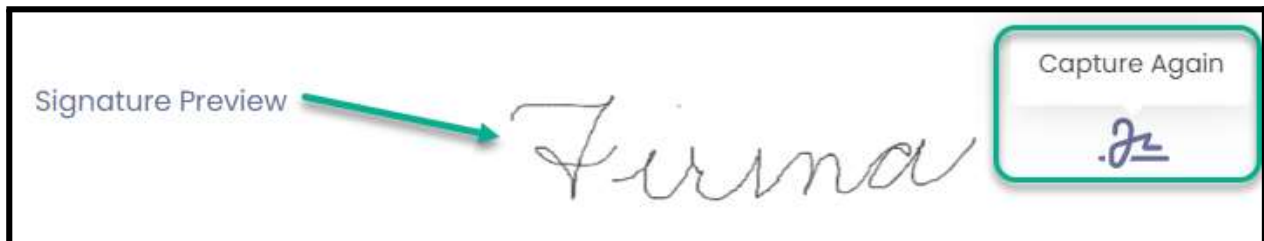


From here, the digital signature pad will appear to create a handwritten signature. Once the signature is created, select 'OK' to save the signature.



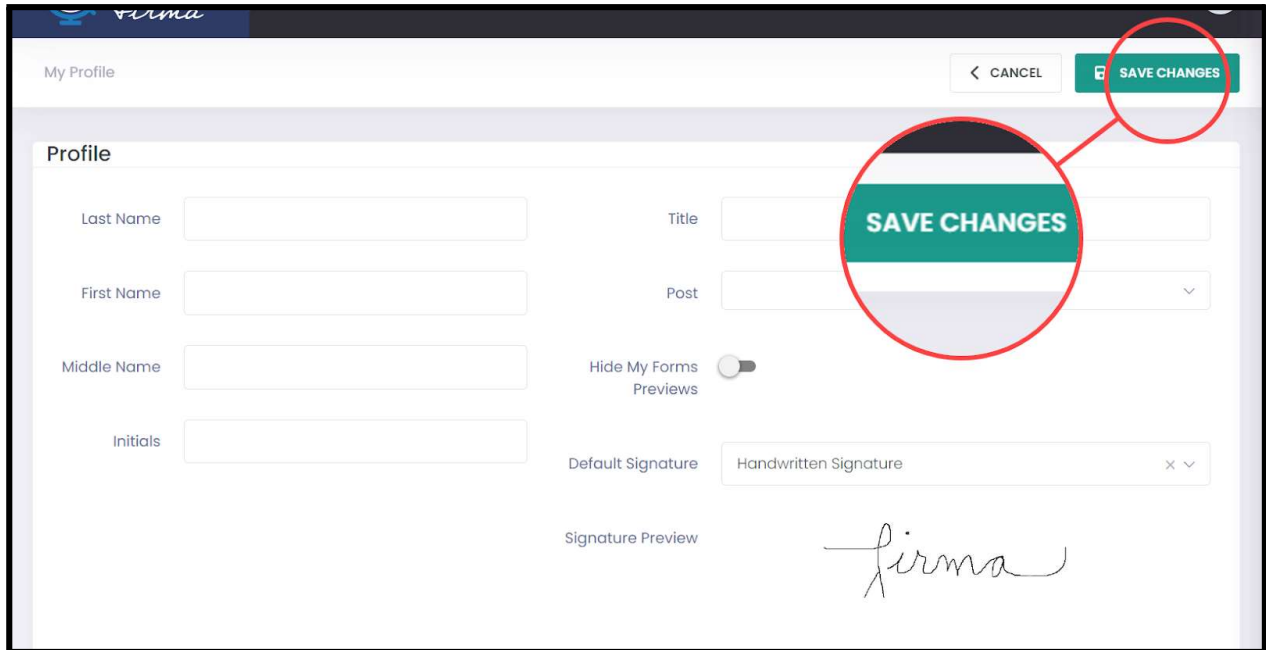
- Users can **CLEAR** the signature as many times as needed to create the desired look.

After selecting 'OK,' the handwritten signature is viewable in the 'Signature Preview.' If the signature needs to be recreated, select 'Capture Again' to return to the digital signature pad.



SAVING THE UPDATED PROFILE AND SIGNATURE

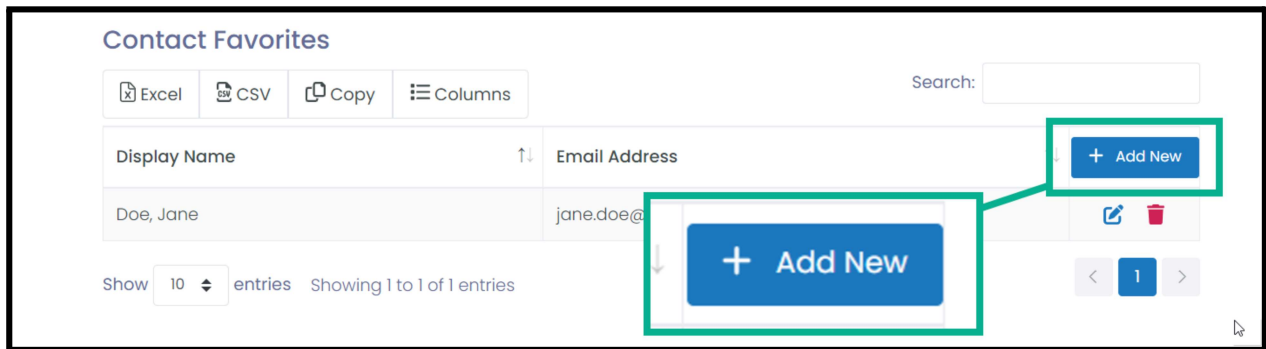
Once the profile is complete and a signature is selected, remember to **SAVE CHANGES!**



ADDING FREQUENTLY USED CONTACTS TO FAVORITES

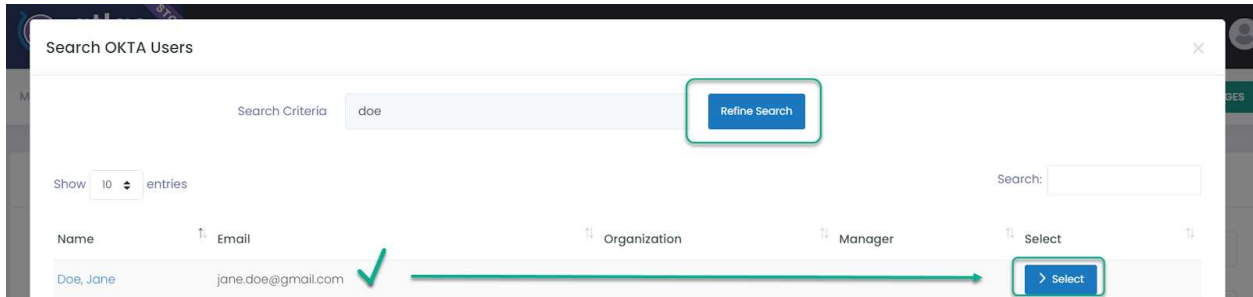
Select 'My Profile.'

The '**Contact Favorites**' section can be found at the bottom of the **Profile** page. To add favorites to the contact list, click '**Add New**.'



A pop-up window will appear with the option to search the Okta database for other users. Type the name of a contact in the '**Search Criteria**' bar and click '**Refine Search**.' A list of Okta users will populate. Find the correct contact and click '**Select**.'



- **Double-check the email address!** Some Okta users have the same name. Be sure to select the Okta user with the correct email address.



The user is now visible under the list of **Contact Favorites**.

- There is no limit to the number of Contact Favorites a user can have.

DELETING OR EDITING A CONTACT

Deleting and editing a Favorite Contact is simple. To remove a Favorite, click the **Delete** icon (). To edit the display name and/or email of a Favorite Contact, click the **Edit** icon ().

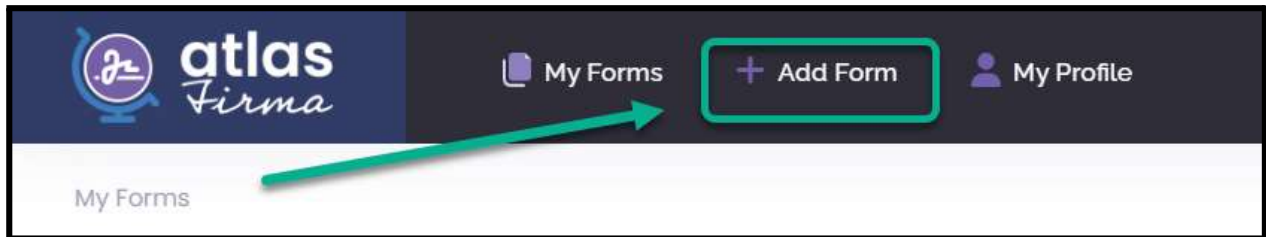
MY FORMS - ADDING A DOCUMENT

The **'My Forms'** dashboard appears upon logging into ATLAS Firma. Here users can see every form associated with their profile.

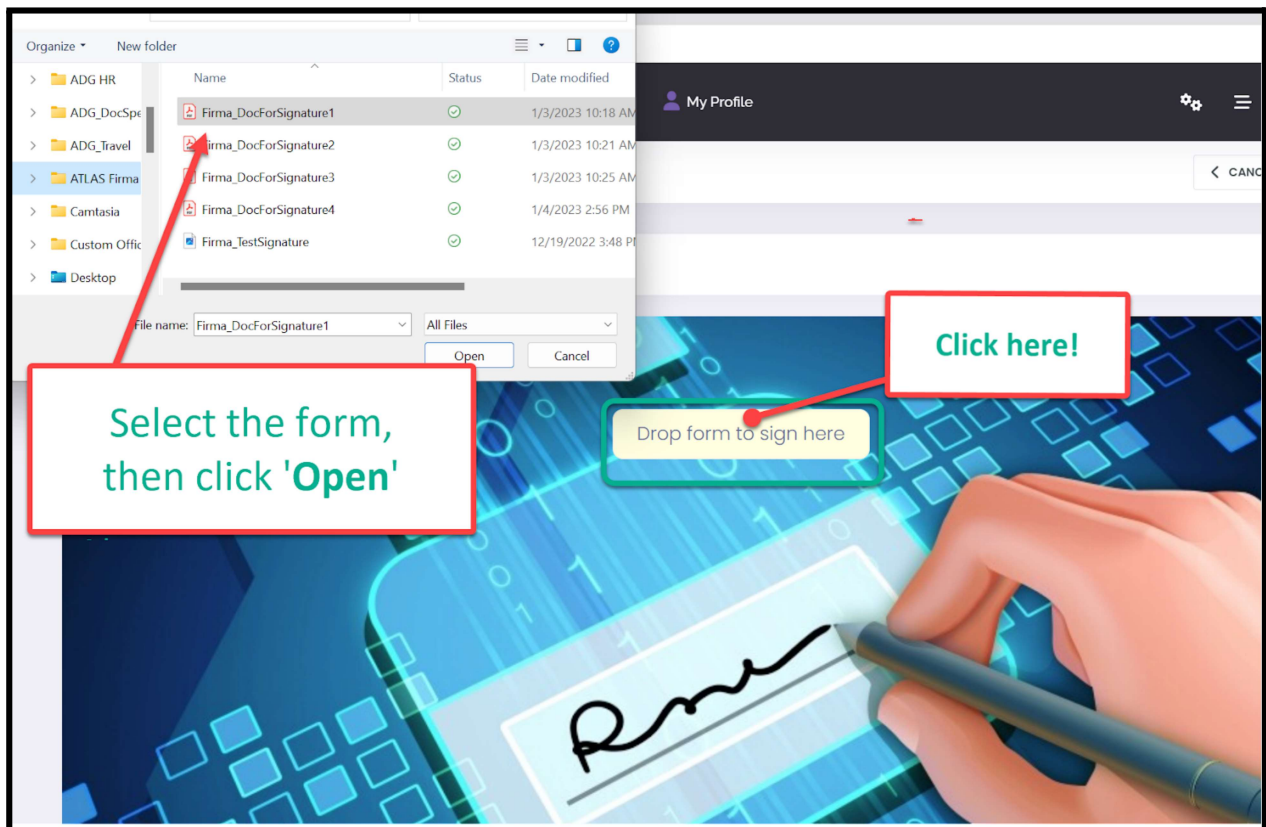
- ATLAS Firma will only accept **pdf** file formats.
- For all other file formats, users must first **save the file as a pdf** to successfully upload the form in ATLAS Firma.

ADDING A FORM

From the 'My Forms' page, select **'Add Form.'**



Click the **'Drop form to sign here'** icon to upload a new form. Select the file from the File Explorer and click **Open**.



After uploading a file, hover mouse over doc is **AUTOMATICALLY** in signing mode. Hover and with just one click users can place the signature block anywhere on the form.

EDITING A SIGNATURE ASSIGNMENT

- After uploading a file, the form is **AUTOMATICALLY** in signing mode. Simply hover over the form and with just one click the user can place the signature block in any location on the form.

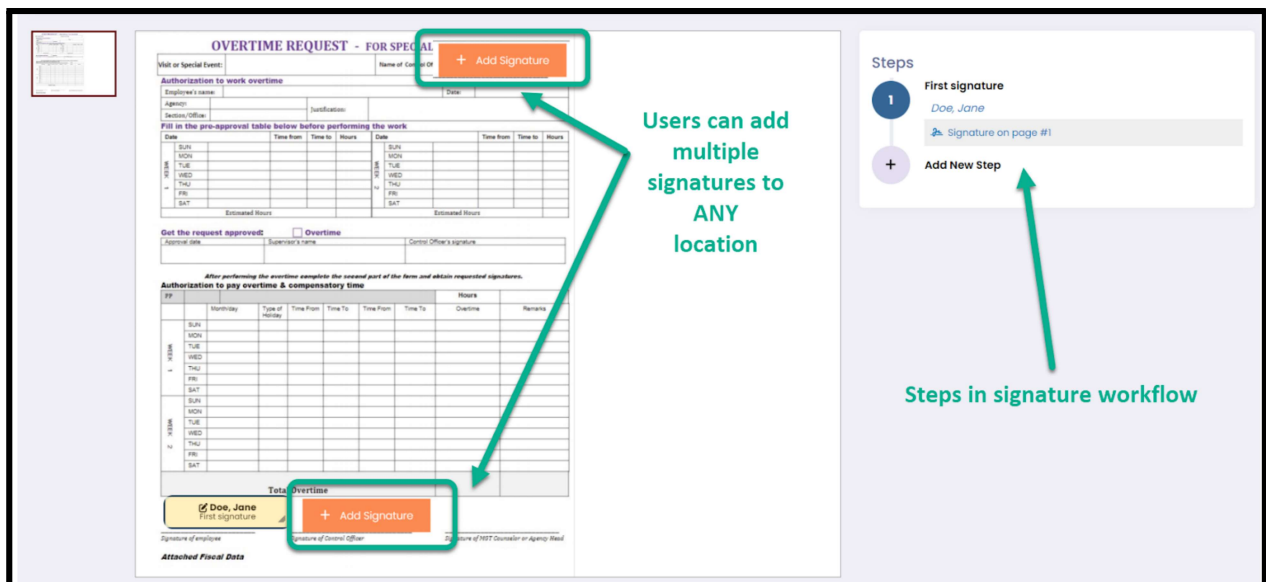
On the 'Create Form' page, users can place **Add Signature** blocks to any location on the newly imported form. Users can add additional steps and also assign the signature workflow to any Okta user.

- Users can edit the **Step** title in the 'Edit Workflow Step' as well. For example, **First Signature** could be retitled as **Management Officer Signature**.

Once the **Step title** and **Assigned to** portions are completed, select 'Close.'

The right panel shows the signature steps in the workflow. Users can add as many steps (signature assignments) in the workflow as needed to complete the form.

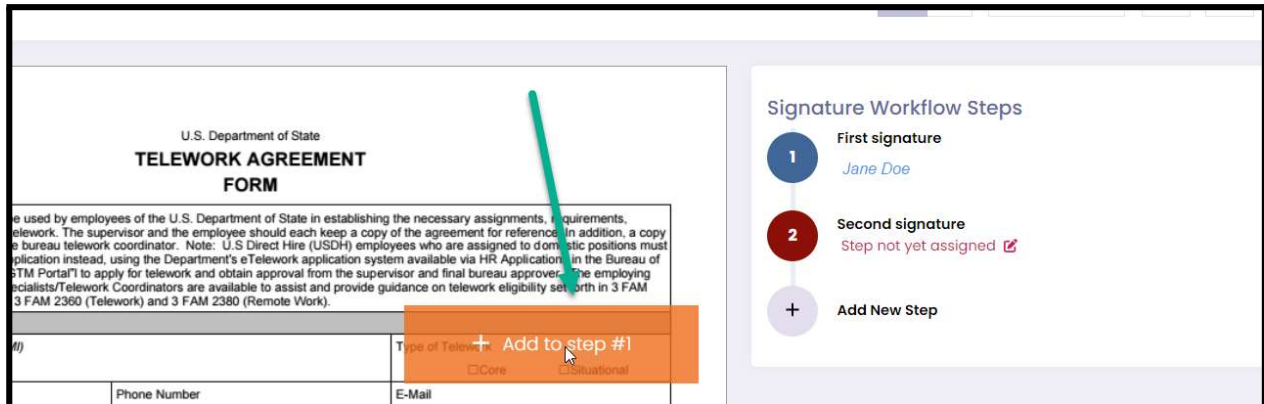
- If multiple signatures are required to complete the form, users can simply move the cursor over the form and the orange 'Add Signature' icon will appear to add another signature to the current step.




The screenshot shows an 'OVERTIME REQUEST - FOR SPECIAL' form. Two orange '+ Add Signature' buttons are highlighted with green boxes. One is at the top right, and the other is at the bottom right, near the 'Total Overtime' field. A green arrow points from the text 'Users can add multiple signatures to ANY location' to these buttons. On the right side, a 'Steps' panel shows a workflow with '1 First signature' (Doe, Jane) and an 'Add New Step' button. A green arrow points from the text 'Steps in signature workflow' to the 'Add New Step' button.

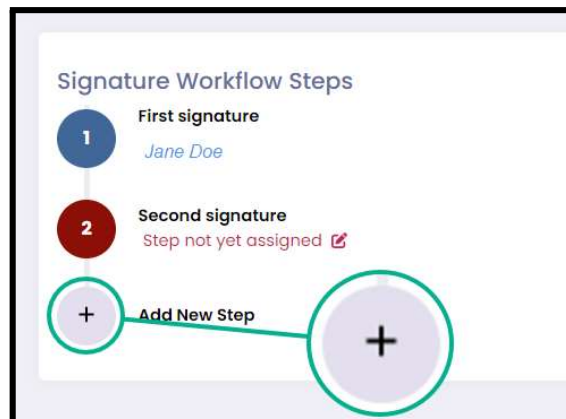
ADDING MULTIPLE SIGNATURES TO THE SAME STEP

Multiple Okta users can be assigned to the same signature step in the workflow. To do this, simply place the cursor over the desired form location, click, and assign additional Okta users.




CREATING A NEW STEP

To create another step in the workflow, for example if the supervisor must only sign after the employee has completed the first signature step, simply click on the **Plus** icon () next to 'Add New Step' and select the Okta user assigned to the next step of the signature workflow.



- Users can add as many steps and Okta user signatures as necessary to any signature workflow.

EDITING A SIGNATURE ASSIGNMENT


If a signature needs to be reassigned or retitled, select the red **'trash'** icon () next to the Okta user's name. The **'Edit Workflow Step'** appears where users can edit the step title or the assigned Okta user.

My Forms

Edit Workflow Step

Step
First signature

Assigned to:

Name	Email	
Doe, Jane	jane.doe@gmail.com	

Assign to: Me Okta Search

Do, Jane

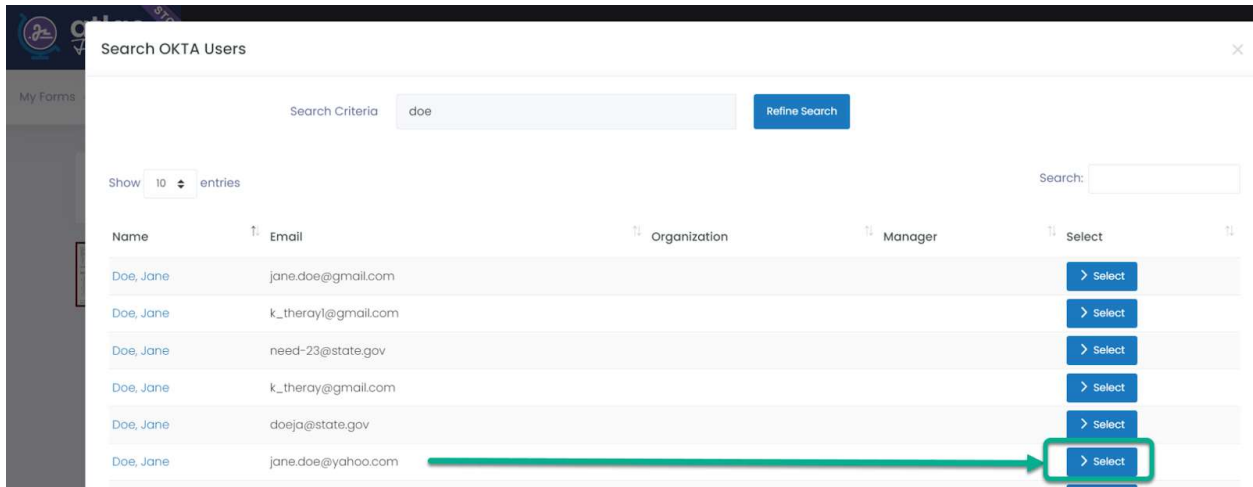
Delete Close

Search OKTA Users

Search Criteria

Please type your search criteria and press enter

Cancel



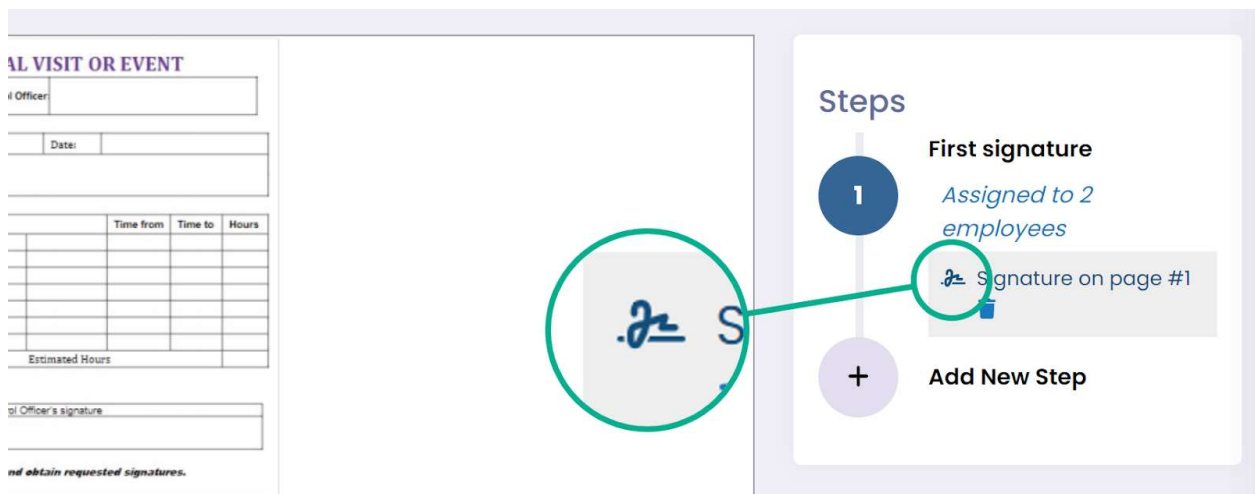
Select the correct Okta user for the signature workflow step and then click 'Close.' Follow the same process as above to add, edit, or delete users to the same signature workflow.


- The number of employees assigned to a step will be listed on the Signature Line and under each step of the signature workflow.

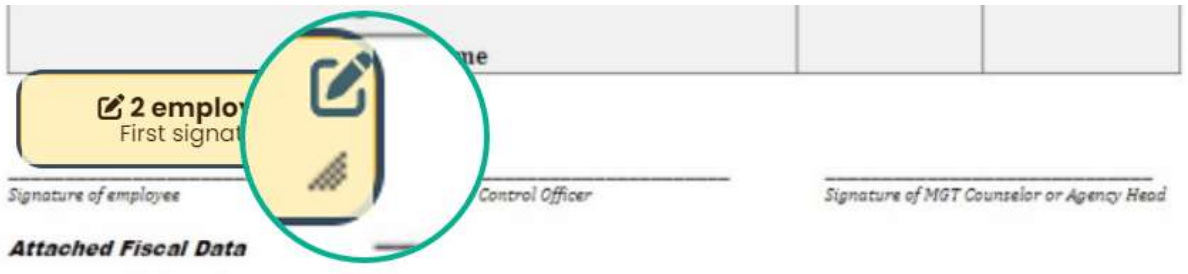
EDITING A SIGNATURE PROPERTY

There are two ways to edit the **Signature Type**, **Signature Label**, **Step**, or **Page**:

- Select the title next to the **ATLAS Firma** icon ().



- Select the **Edit** icon () in the top right corner of the signature block.



Edit the **Signature Type**, **Signature Label**, **Step**, or **Page** in the pop-up window and select 'Close.'

- Once the form is ready, users can **Save As Draft** or **Start Signature Workflow** to begin the signature process.

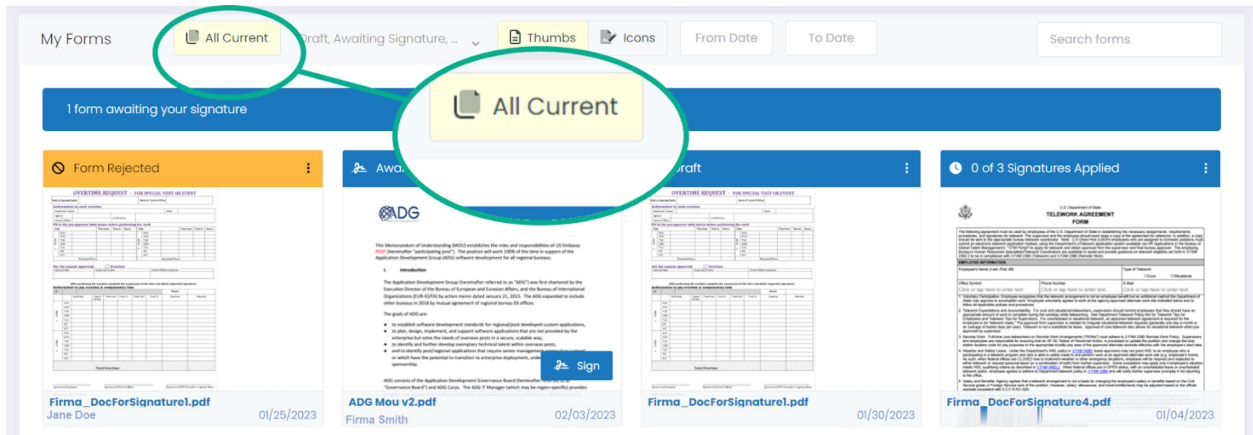
ATLAS FIRMA DASHBOARD

The dashboard provides an at-a-glance view of your Forms. It provides multiple viewing options, depending on the needs of the user.

ALL CURRENT (UNARCHIVED) FORMS VIEW

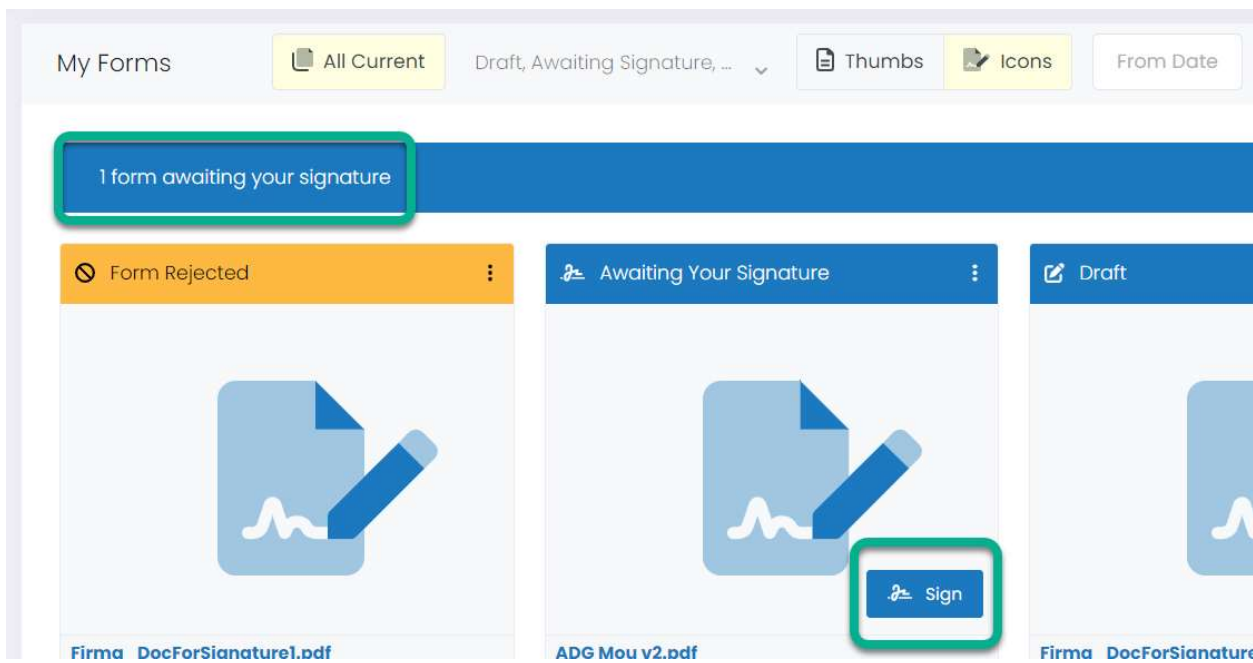
The default view, set to '**All Current**,' allows users to see every form s/he authored or is required to sign.

- Users can return to the **All Current** view at any time.



ACTION ITEMS

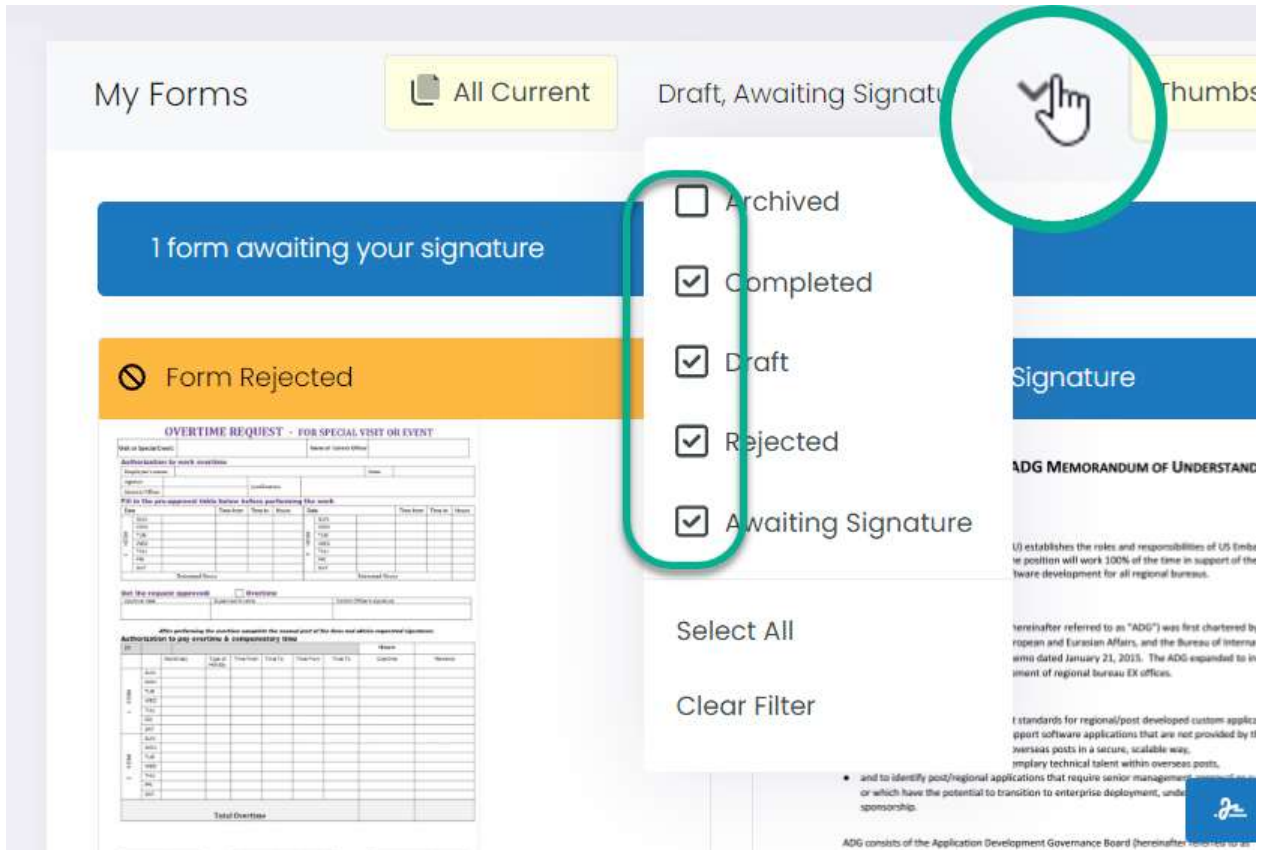
Forms that require action are listed in the top banner. Additionally, the **‘Sign’** button appears on the lower right corner of the form for users to click and apply a signature to the form.



FILTERS

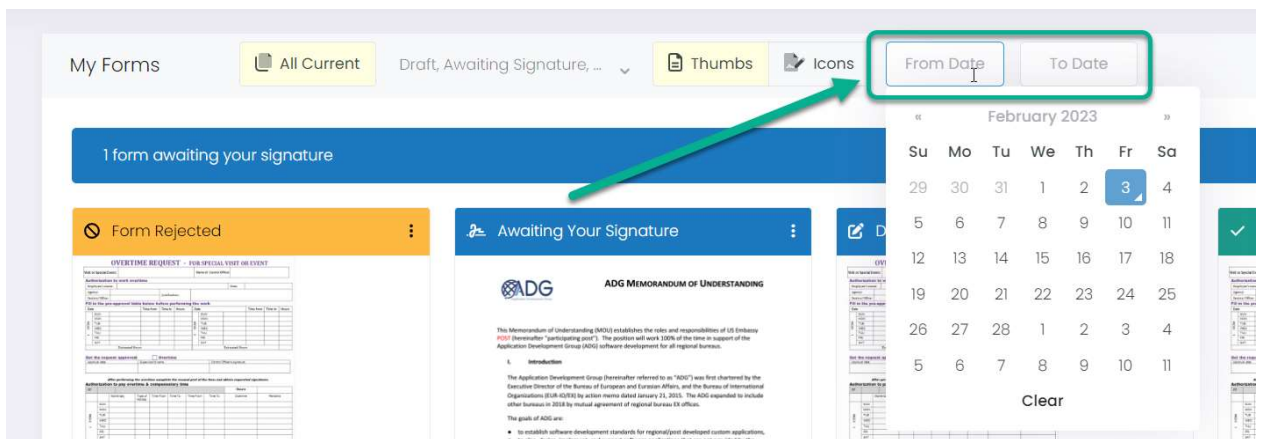
FILTER BY TYPE:

To view only one type of form, users can filter forms displayed in the dashboard by selecting **Archived, Completed, Draft, Rejected, or Awaiting Signature.**



FILTER BY DATE:

Users can also filter by date. Simply type in or select the “**From Date**” and “**To Date**” to filter the forms by date range.

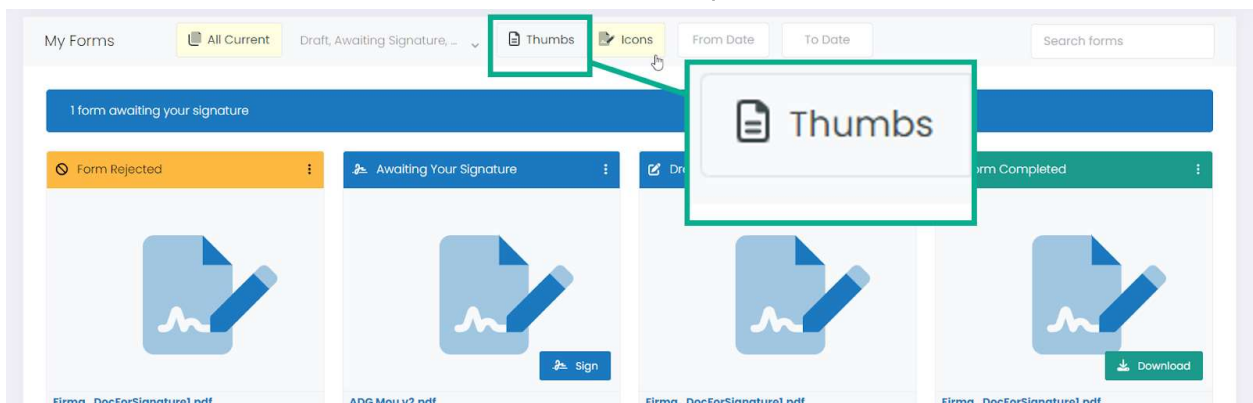


THUMBS VS ICONS

Users can customize the profile dashboard to preview forms as either thumbnails or icons. If a user works in a public location or requires privacy to view the forms, the user might prefer the **Icon** view, which displays limited information. If a user requires a full preview, select the **Thumb** view.

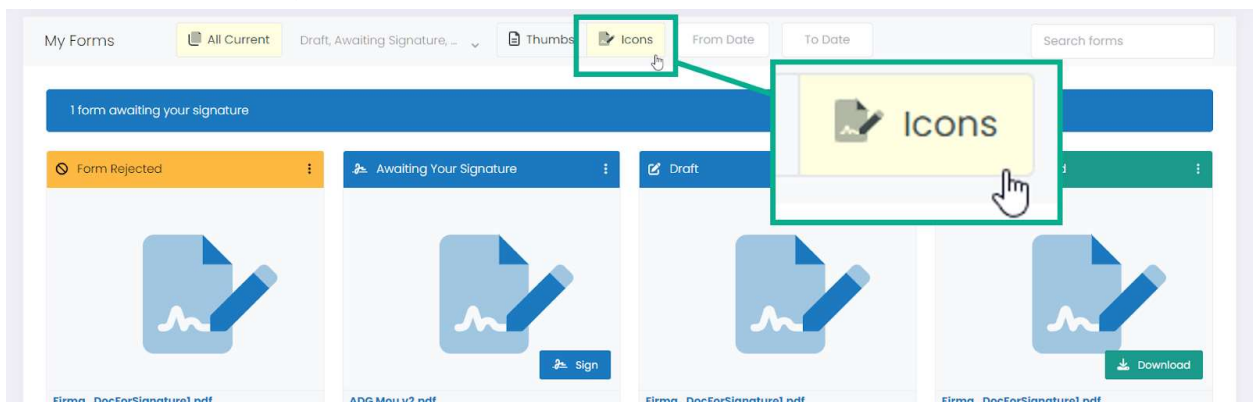
THUMBS

To customize the profile dashboard to display thumbnails, select 'Thumbs' from the **My Forms** menu. All forms should now be visible as a document preview.



ICONS

To customize the profile dashboard to display limited form information, select 'Icons' from the **My Forms** menu. Only the ATLAS Firma icon, workflow step, and form title are visible.

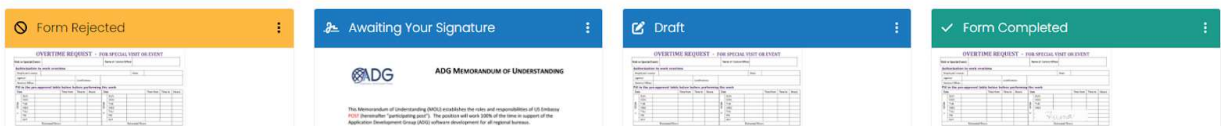


- Users can switch between the **Thumb** and **Icon** views at any time.

HOW FORMS ARE ORDERED - SIGNATURE WORKFLOW STATUS

ATLAS Firma forms are ordered according to priority, which is determined by signature workflow status. A yellow banner will appear if action is required by a user. These forms will always be listed first.

Signature workflow status is also easily determined by a form's banner. Banners are clearly marked by color and label.

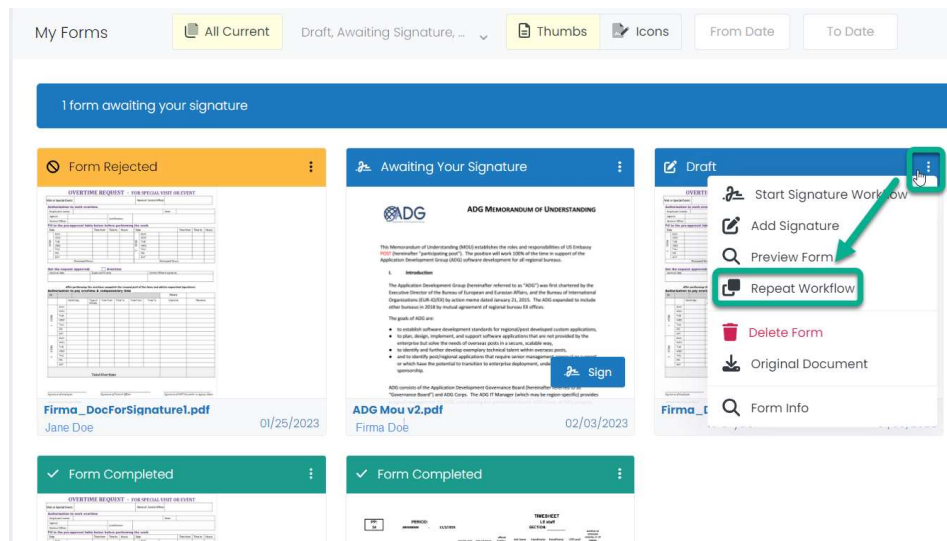


MY FORMS - REPEATING A WORKFLOW

Some users may need to create the same workflows many times. For example, if an employee frequently works overtime, that user might need an overtime form signed by the same individuals on several different occasions. In that case, a user can **Repeat a Workflow**.

HOW TO REPEAT A SIGNATURE WORKFLOW

Select the vertical ellipses in the top right corner of a form in the **My Forms** dashboard. From the dropdown menu, select **'Repeat Workflow.'**



Once a form is uploaded, ATLAS Firma will auto populate the repeated Signature Workflow Steps and Users.

