



atlas Firma

VERSION 1.3 LAST UPDATED DECEMBER 15, 2025

ATLAS Firma User Guide

ATLAS FIRMA CONTENTS

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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 a user-friendly application for Department of State employees to electronically sign documents and forms. With ATLAS Firma, users can establish a signature flow for any form requiring a signature(s). ATLAS Firma helps users manage the flow of:

- One-Time Signatures
- Repeating Signatures
- API Signatures

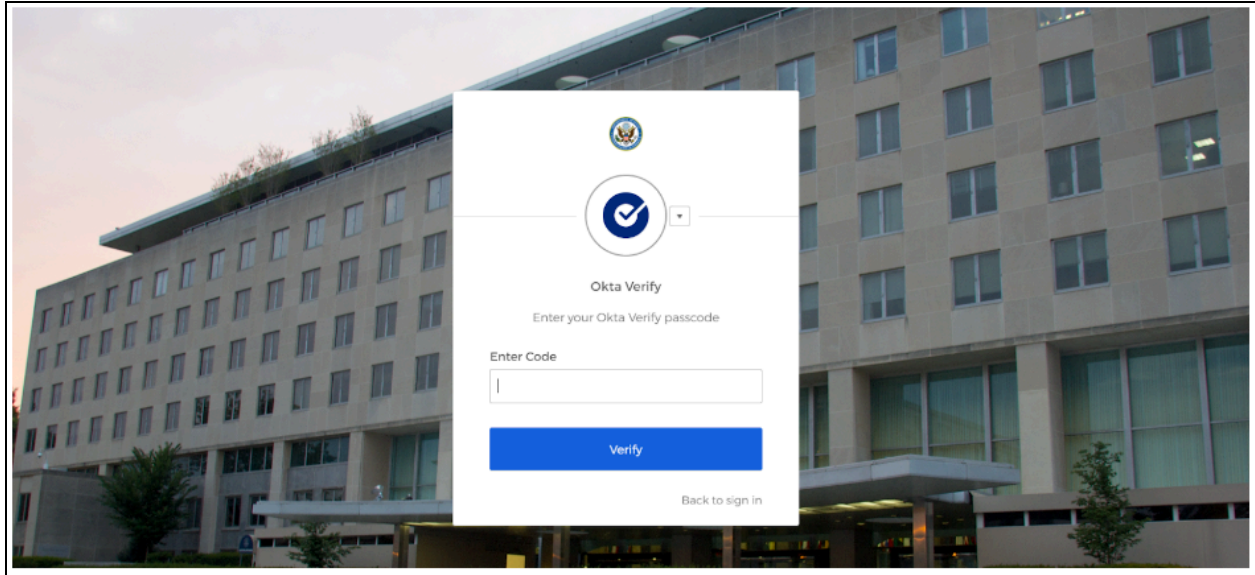
- ATLAS Firma will only accept **PDF** file format.
- For all other file formats, users must first **save the file as PDF** to successfully upload the form in ATLAS Firma.

ACCESSING ATLAS FIRMA

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

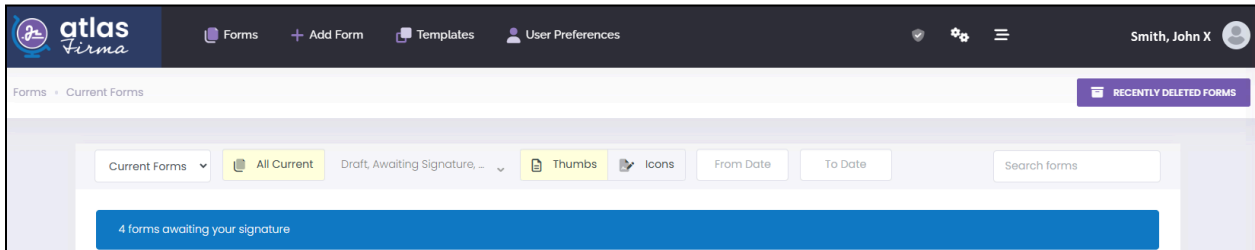
Users can sign in from any web browser by logging in via **Okta Verify**. (If you have SAFE, you have an Okta Verify account.) Don't have an Okta account? Reach out to the post's DT section or submit a request to ADG-Support@state.gov.

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.



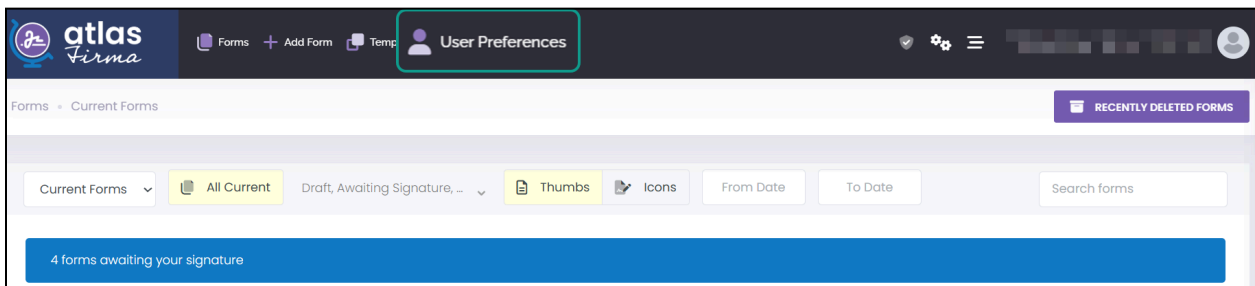
Once signed in, your browser will take you to ATLAS Firma automatically.

WELCOME TO ATLAS FIRMA!



EDITING THE ATLAS FIRMA PROFILE

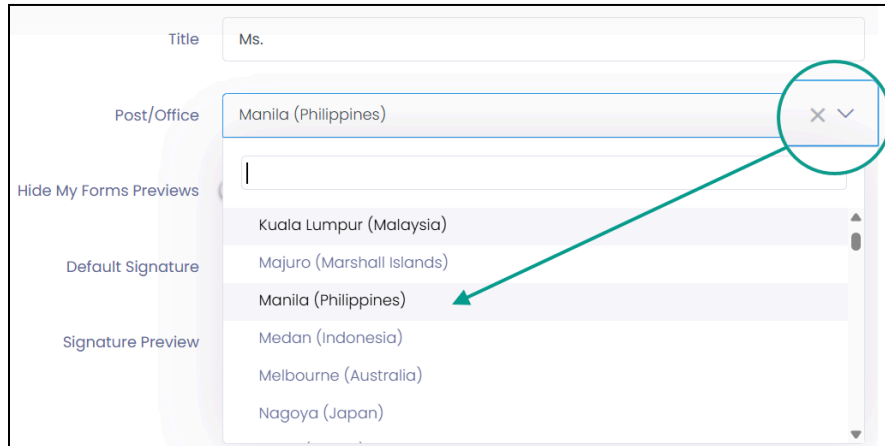
Select 'User Preferences.'



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

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

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



The screenshot shows a user profile form with the following fields:

- Title: Ms.
- Post/Office: Manila (Philippines) (highlighted with a red circle and a dropdown arrow)
- Hide My Forms Previews: [Empty text box]
- Default Signature: Majuro (Marshall Islands)
- Signature Preview: Medan (Indonesia)

The dropdown menu for Post/Office is open, showing the following options:

- Kuala Lumpur (Malaysia)
- Majuro (Marshall Islands)
- Manila (Philippines) (highlighted with a red arrow)
- Medan (Indonesia)
- Melbourne (Australia)
- Nagoya (Japan)

- “My Preferences” is also accessible by clicking on the user’s name and icon in the upper-right corner of the screen, then selecting **Edit My Profile**.

CREATING AND EDITING A SIGNATURE

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

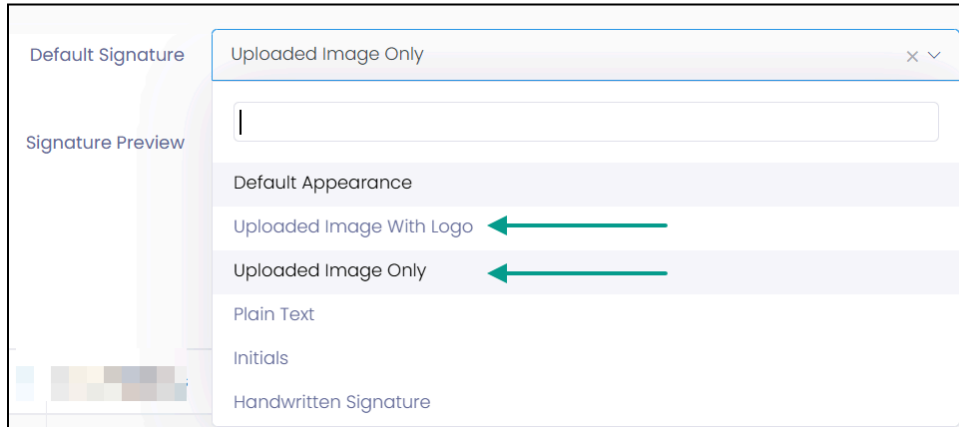
- The **Default Appearance, Plain Text, and Initials** are preconfigured for each user. If a signature image or handwritten signature is preferred, users can add and edit these signatures in the ‘My Profile’ section.

ADDING A PERSONALIZED SIGNATURE

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

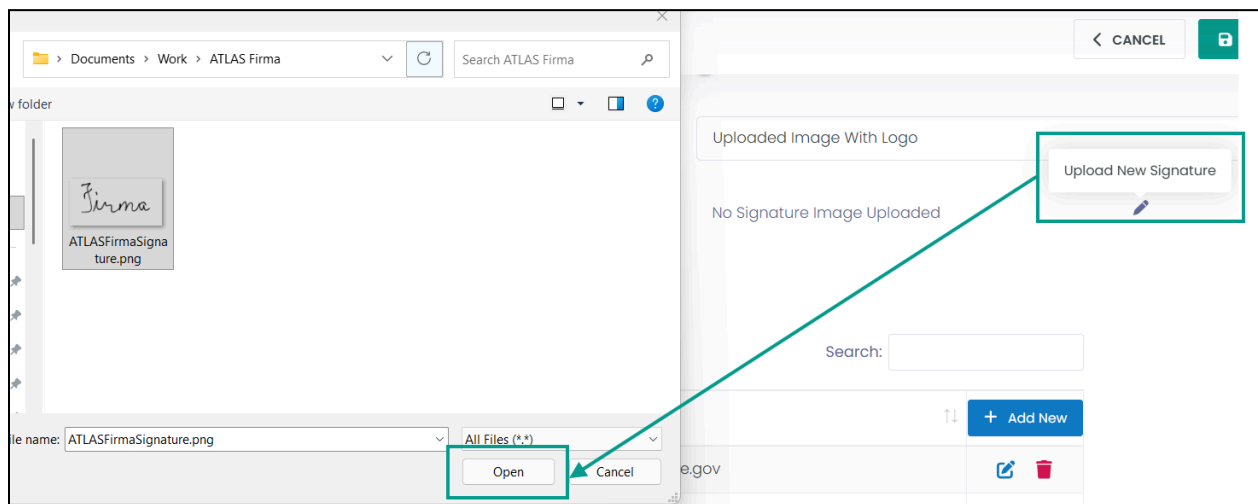
UPLOADED IMAGE

To upload an image, select **Uploaded Image Only** or **Uploaded Image With Logo**, which includes the ATLAS Firma logo, from the 'Default Signature' dropdown.



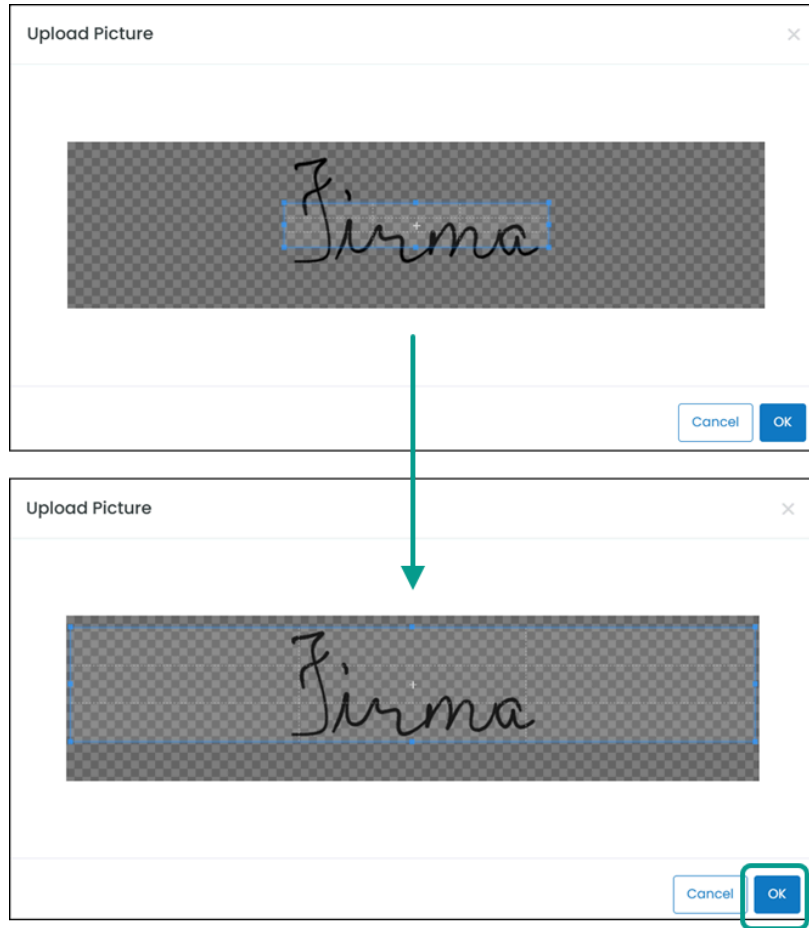
The '**Signature Preview**' status now displays '**No Signature Image Uploaded.**'

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.**'



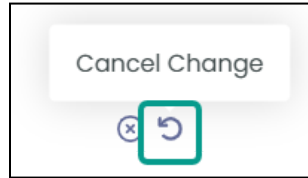
- For a quick video of the signature editing process, click [here](#).

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.

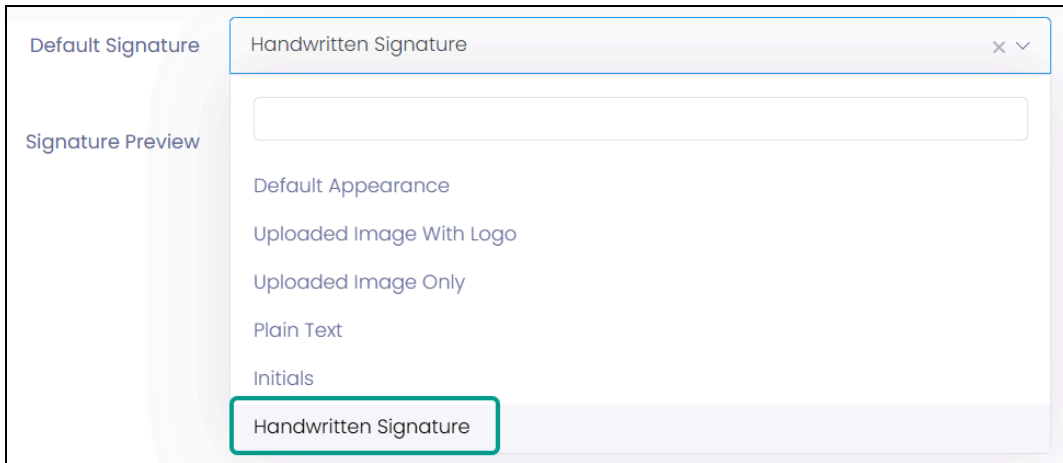


If a user changes the signature but prefers the previous version, users may select the 'Cancel Change' icon which allows the user to revert back to the previous version.

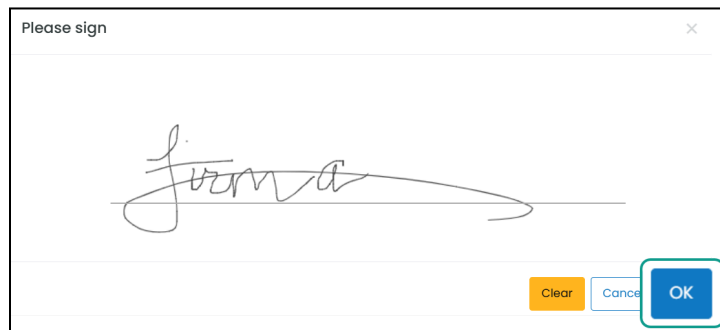


HANDWRITTEN SIGNATURE

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

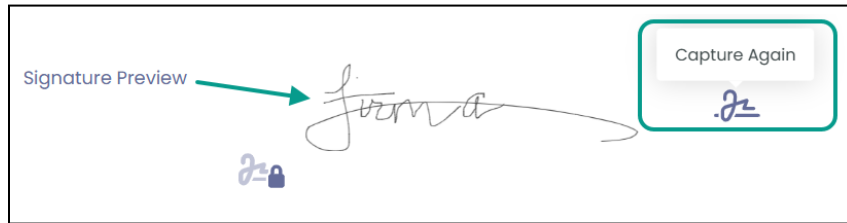


From here, the digital signature pad will appear to create a handwritten signature. Once the signature is created, select 'OK' to save the signature.



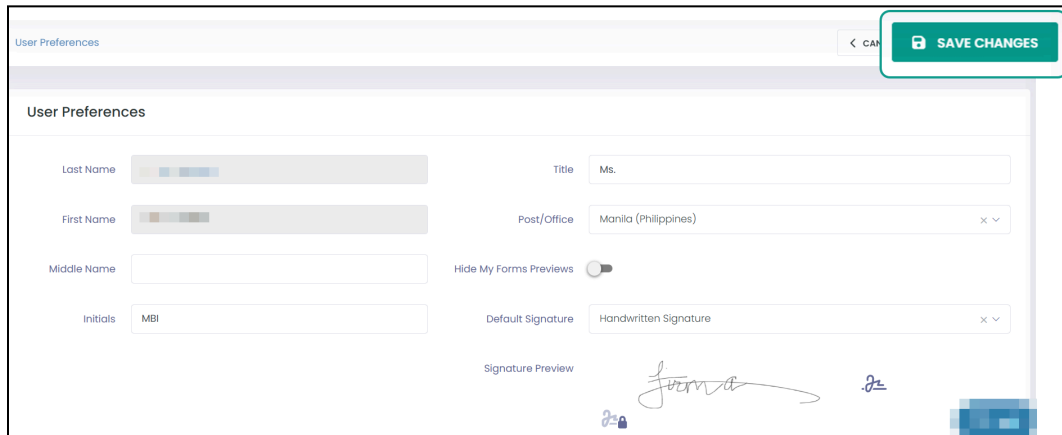
- Users can **CLEAR** the signature as many times as needed to create the desired look.

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.



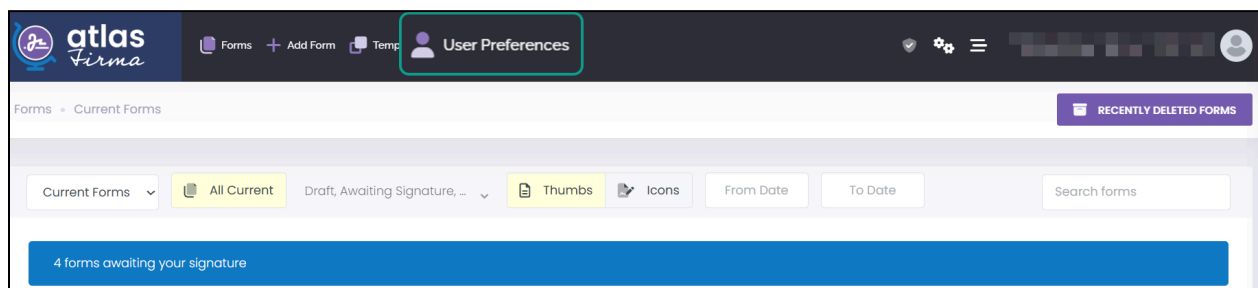
SAVING THE UPDATED PROFILE AND SIGNATURE

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

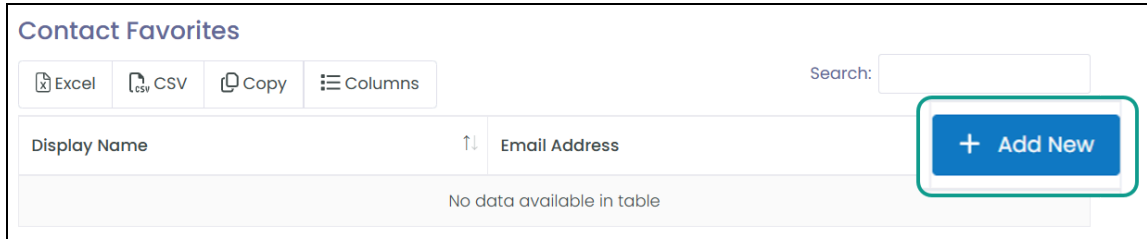


ADDING FREQUENTLY USED CONTACTS TO FAVORITES

Select 'User Preferences.'

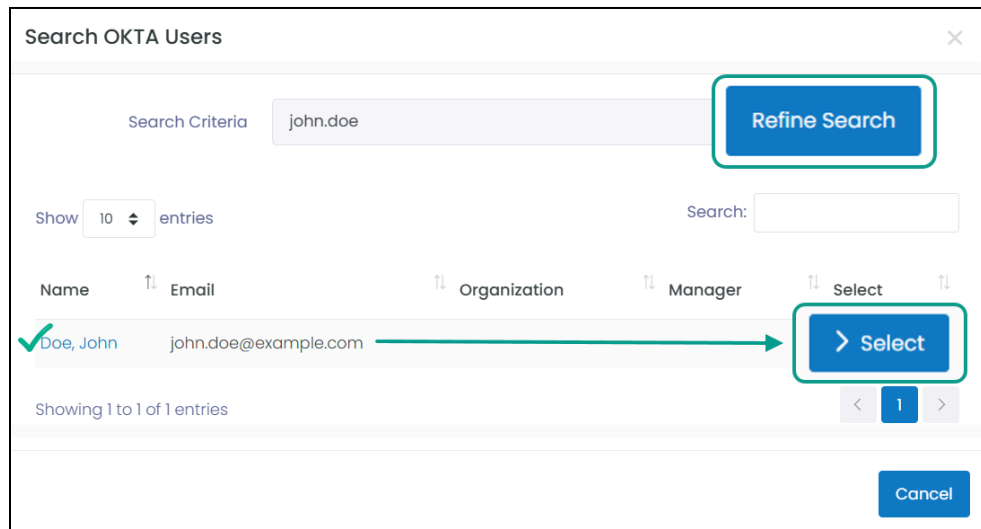


The 'Contact Favorites' section can be found at the bottom of the **User Preferences** page. To add favorites to the contact list, click 'Add New.'



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

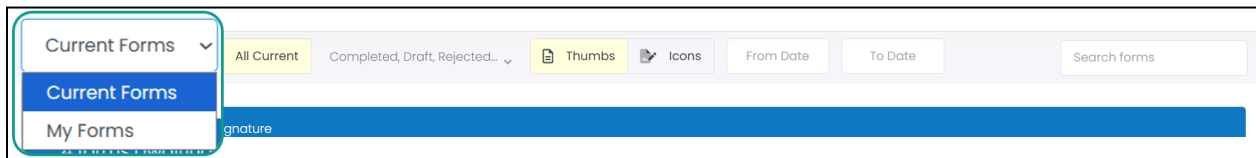
Deleting and editing a Favorite Contact is simple. To remove a Favorite, click the **Delete** icon (). To edit the display name and/or email of a Favorite Contact, click the **Edit** icon ().

FORMS DASHBOARD

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

CURRENT FORMS VS MY FORMS

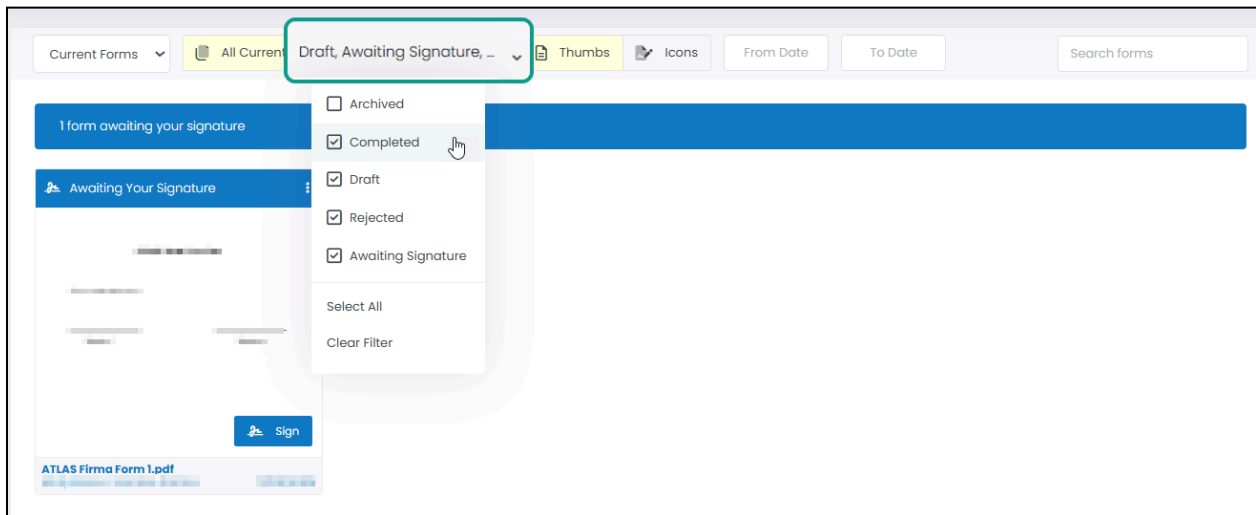
Selecting **'Current Forms'** from the dropdown displays all non-deleted forms where the user has an assigned role. while **'My Forms'** displays all forms created by the user.



FILTERS

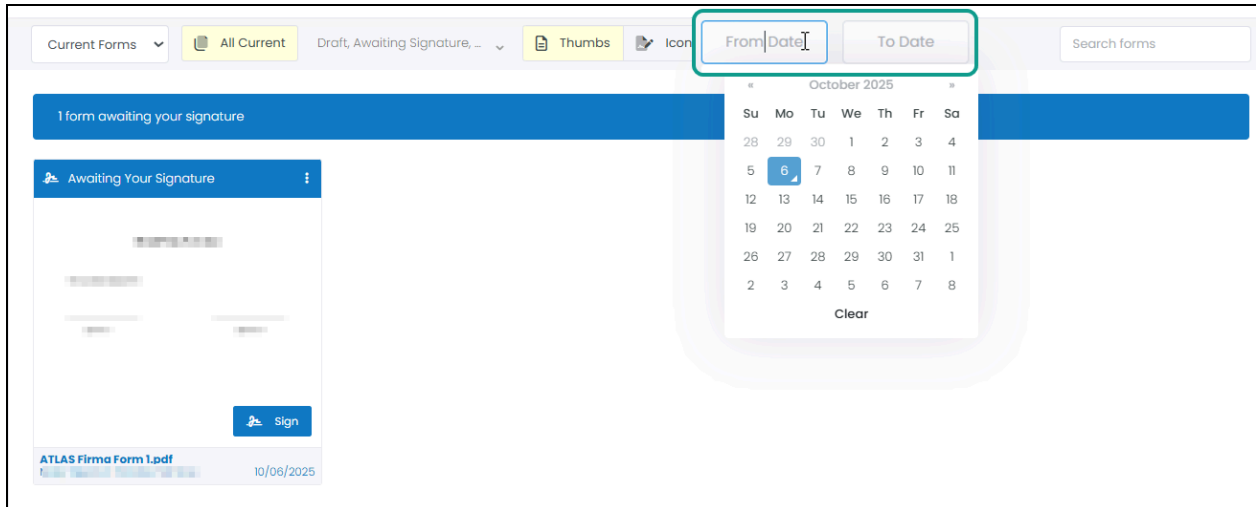
FILTER BY TYPE:

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.

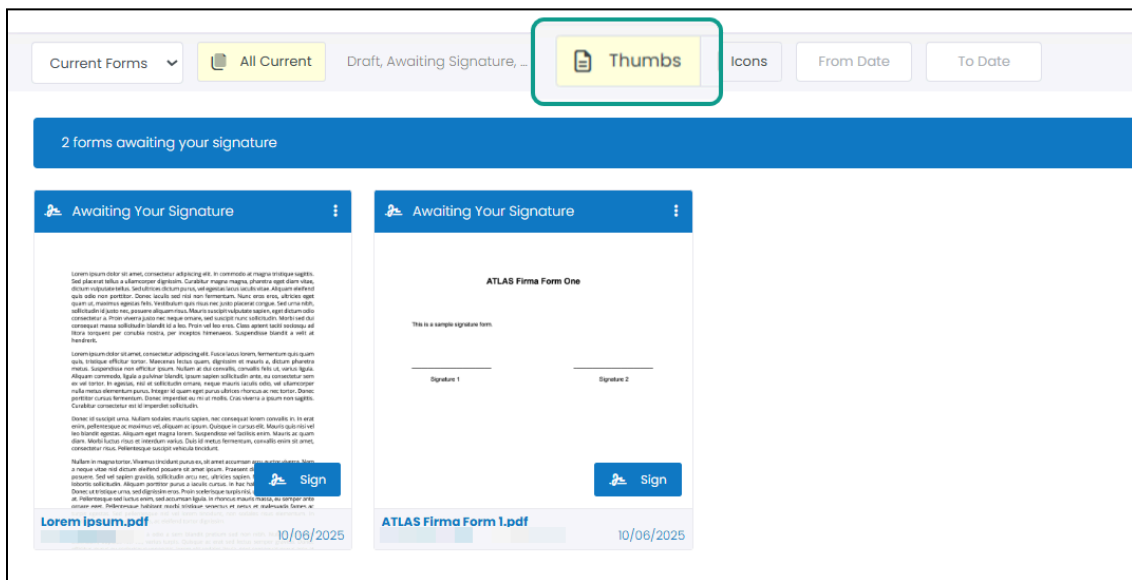


THUMBS VS ICONS

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.

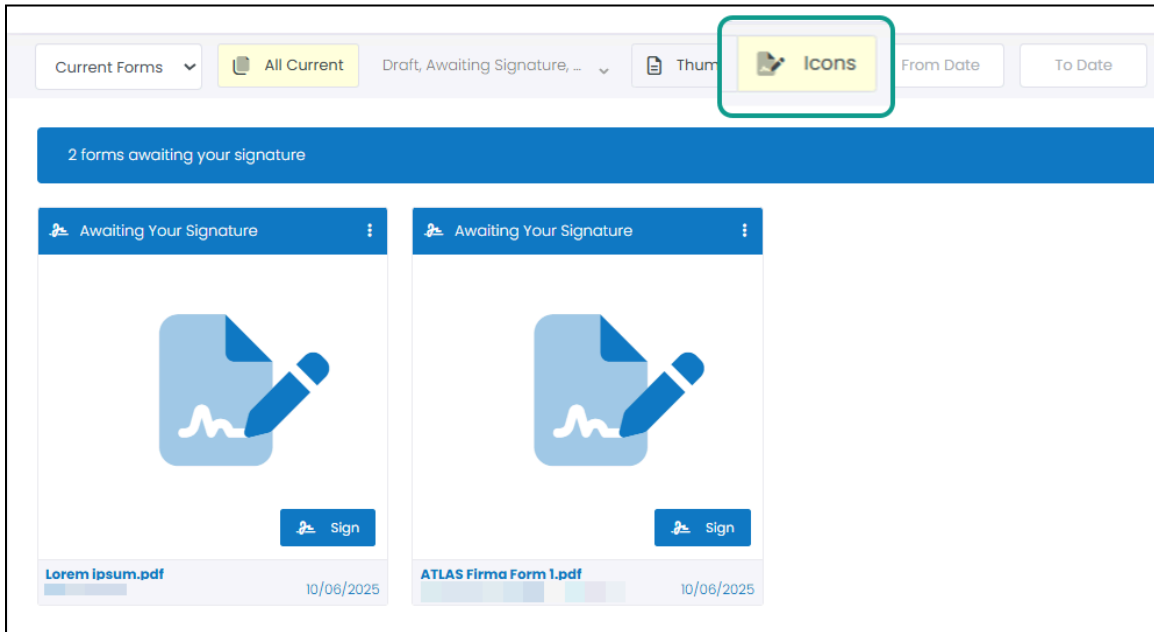
THUMBS

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

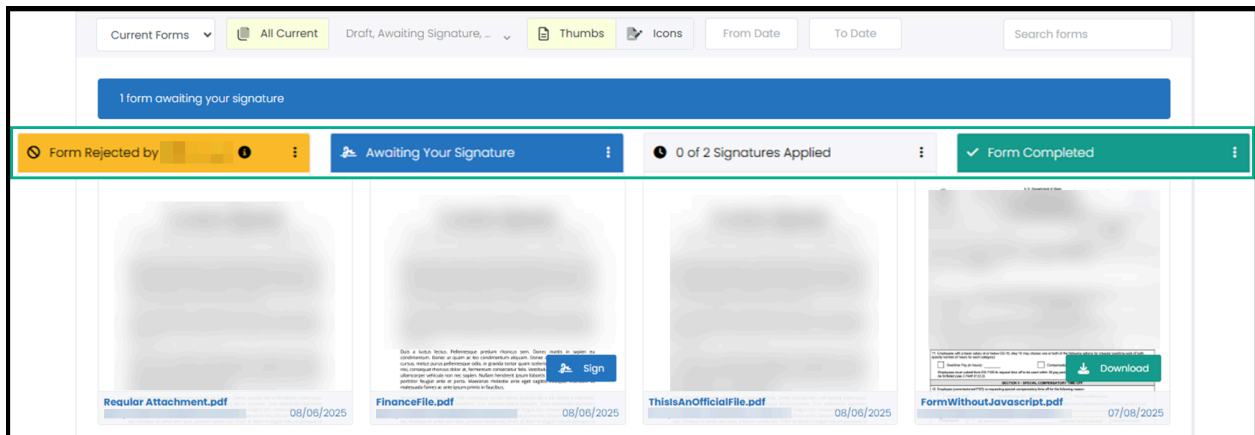
To customize the profile dashboard to display limited form information, select **'Icons'** from the **My Forms** menu. Only the ATLAS Firma icon, workflow step, and form title are visible.



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

FORM STATUS

Forms on the dashboard are organized by status, which is visually indicated by the color of their banners. Additionally, a blue banner will be displayed at the top of the page, notifying users of the number of forms awaiting a signature.



DRAFT

Forms with a **Draft** status appear with a blue banner on the dashboard. At this stage, the user has uploaded the document but has not yet initiated the signature workflow. The form can be opened to adjust the signature workflow and update document details, such as the title, filename, and description.

**Once the form owner initiates the signature workflow, they will receive an email notification confirming the workflow has started, and the current signer will be notified via email that a form is awaiting their action.*

AWAITING YOUR SIGNATURE

Forms marked with an **Awaiting Your Signature** status appear with a blue banner on the dashboard. The current signer will receive an email notification informing them that a form requires their attention. These forms are in the user's queue and require action—either to sign or reject—to advance the signature workflow. Additionally, the current signer can use the **Reroute Current Step** feature to assign the signature step to another user.

FORM COMPLETED

Forms marked as **Completed** are displayed with a green banner on the dashboard, indicating that the signature workflow process is finalized. Once completed, the form owner, signer, and all individuals on the watchlist receive an email notification confirming the process is finished. At this stage, the form becomes locked and password-protected, with only the form owner having access to the **Reveal Password** option. The form owner also has the ability to delete the form, which removes it from the dashboards of the owner, signer, and viewer.

Completed forms older than 30 days are automatically archived and removed from the Forms dashboard. Forms archived by ATLAS Firma will retain the status of **Form Completed,** while forms manually archived by the user will display the status **Form Archived.** This distinction clarifies whether a form was archived through user action or automatically by Firma after surpassing the 30-day limit.

FORM REJECTED

Rejected forms appear with a yellow banner on the dashboard and include the name of the signer who rejected the form. Once a form is rejected, the signature workflow is stopped, and email notifications are sent to the signer, the form owner, and everyone on the watch list.

The form owner has the option to delete a form, which will remove it from the dashboards of the owner, signer, and all individuals on the watchlist.

FORM ARCHIVED

When the form owner archives a form, its status updates to **'Form Archived'** for the owner, signer, and all individuals on the watchlist. No email notification is sent upon archiving.

OF # SIGNATURES APPLIED

Forms with an **'Awaiting Your Signature'** status are displayed with a banner on the dashboard. As the form owner or a watchlist member, you can monitor the form's progress within the signature workflow without needing to take action.

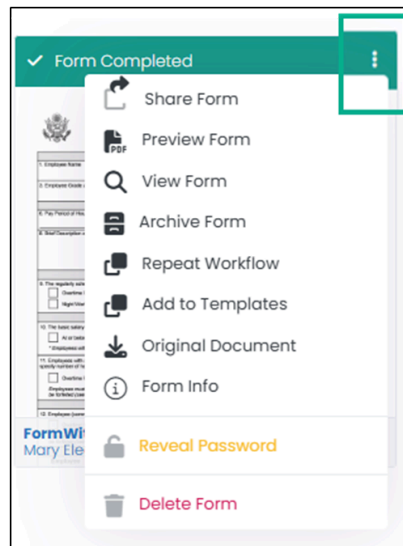
Additionally, form owners have the option to use the **'Reroute Current Step'** feature if the signer for the current signature step is unavailable.

FORM DELETED

Deleted forms can be accessed by clicking the **'Recently Deleted Forms'** button. Only the form owner has the authority to delete a form, which remains in the **'Recently Deleted Forms'** section for 30 days before being permanently removed. After deletion, all user types can locate the form on their **'Recently Deleted Forms'** page. No email notification is sent if the form is deleted.

FORM ACTIONS

By selecting the ellipsis on a form in the dashboard, the user can access a list of available actions depending on the form status.



SIGN FORM

This enables the current signer to act on the form by signing it, rejecting it, or rerouting it to another signer.

SHARE FORM

This feature enables the form owner to provide viewing access to the form, but it is only accessible after the form has been completed or archived.

SEND EMAIL REMINDER

This feature allows the form owner to send an email reminder to the signer/s of the current signature step.

PREVIEW FORM

This feature allows the user to access the print preview of the form, providing options to download, print, or share it.

VIEW FORM

This feature enables the user to view the form, signature workflow steps, and the watchlist. Additionally, the form owner can reroute the current signature step and update the watchlist. When viewing the form as the signer of the current signature step, they also have the ability to reroute the signature. To sign off, the signer must click the Edit button.

ARCHIVE FORM

Archiving a form changes its status to '**Form Archived**'. To view archived forms, select the Archived option from the Filter dropdown menu on the dashboard.

REROUTE CURRENT STEP

The Reroute Current Step feature allows the form owner or the current signer to add new assignees to the current step of the signature workflow. This option is particularly helpful if the current signer is unavailable. The original signer remains part of the workflow, and the newly added signer receives an email notification alerting them that a form requires their action.

REPEAT WORKFLOW

This feature enables the user to replicate the signature workflow of a document. The user simply uploads a new form, and the existing workflow is applied to it.

ADD TO TEMPLATES

This feature allows form owners to save the signature workflow, providing a convenient solution for frequently used forms. It ensures the workflow is readily available, eliminating the need for form owners to recreate it each time.

ORIGINAL DOCUMENT

This feature allows you to download the original version of the document, excluding any signatures added via ATLAS Firma.

FORM INFO

This section provides details about the form, including its status, the creator, and the creation date. It also outlines the signature steps. If the form has been rejected, a red banner will display the rejection details.

REVEAL PASSWORD

After a form completes its signature workflow process, the form owner can use the Reveal Password feature to unlock the protected PDF file. This enables users to access the file and make any necessary changes to the form.

DELETE FORM

The form owner can delete a form regardless of its status. Once deleted, the form will be visible in the "Recently Deleted Forms" section for 30 days, accessible to the form owner, signer, and all individuals on the watchlist, before being permanently removed from the application.

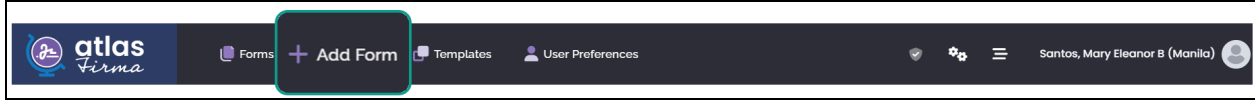
UPLOADING THE FORM

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

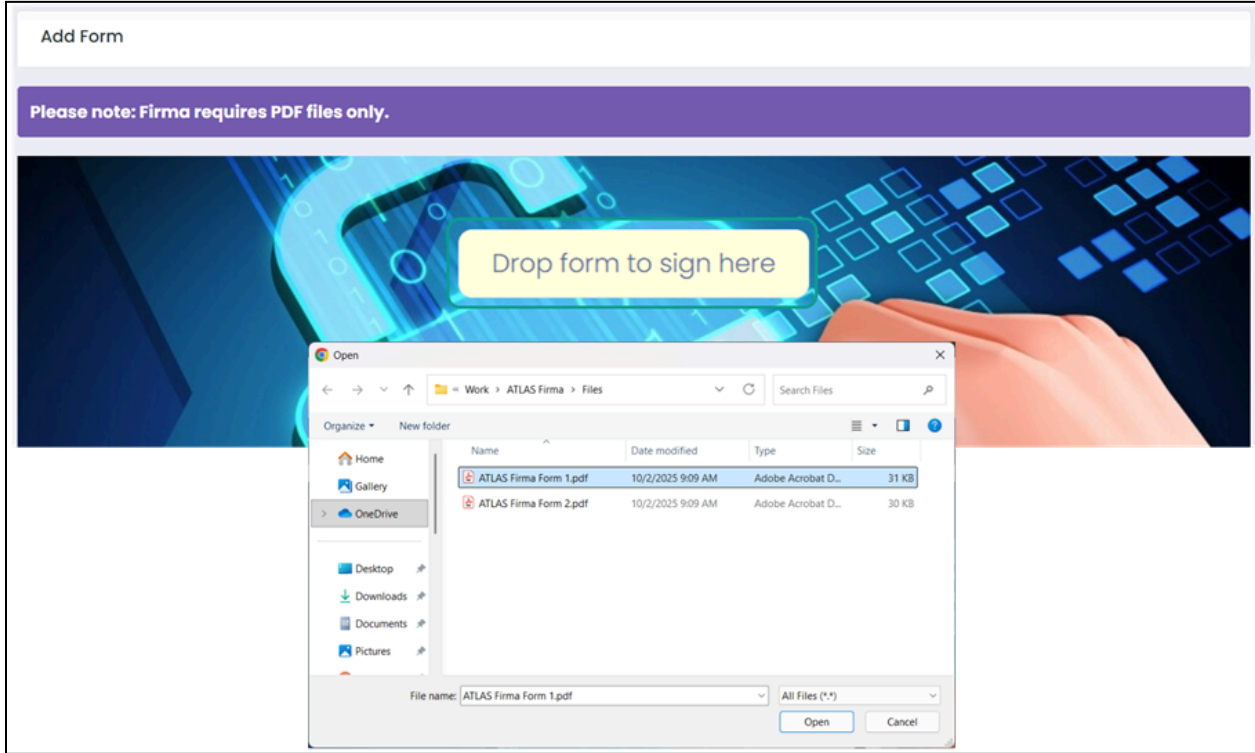
- ATLAS Firma will only accept **PDF** file format.
- For all other file formats, users must first **save the file as PDF** to successfully upload the form in ATLAS Firma.

ADDING FORMS

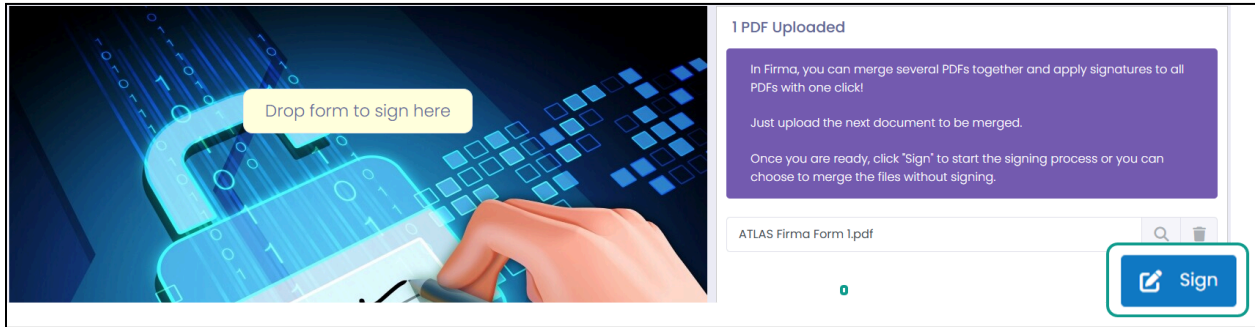
From the header, select **'Add Form.'**



Click the **'Drop form to sign here'**. The user may select one or more files from the File Explorer and click **Open**.



The screen will display the form selected.

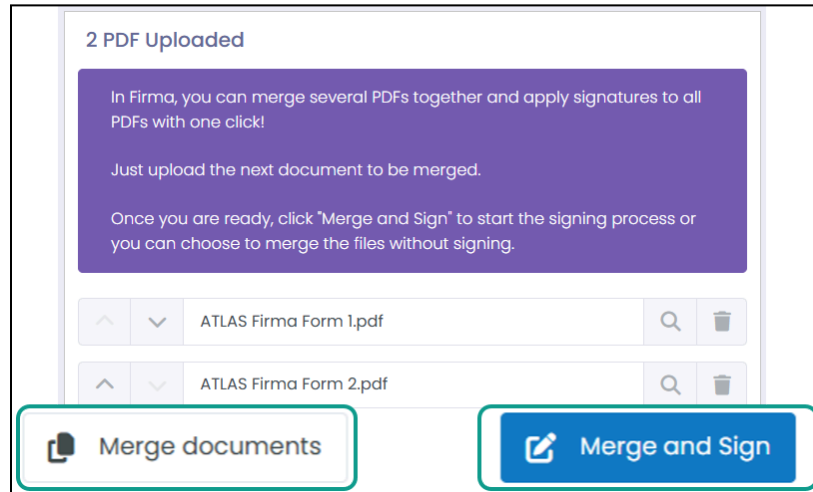


The user can preview and download a file by clicking the magnifying glass icon next to its name. To remove a file from the list, the user can click the delete icon.

To add signature blocks to forms, the user should click the **'Sign'** button. Alternatively, additional forms can be added by clicking **'Drop form to sign here.'**

ATLAS Firma allows users to merge two or more forms. The **'Merge Documents'** option combines all uploaded forms into a single PDF, which is saved in the user's Documents folder without initiating the signature workflow.

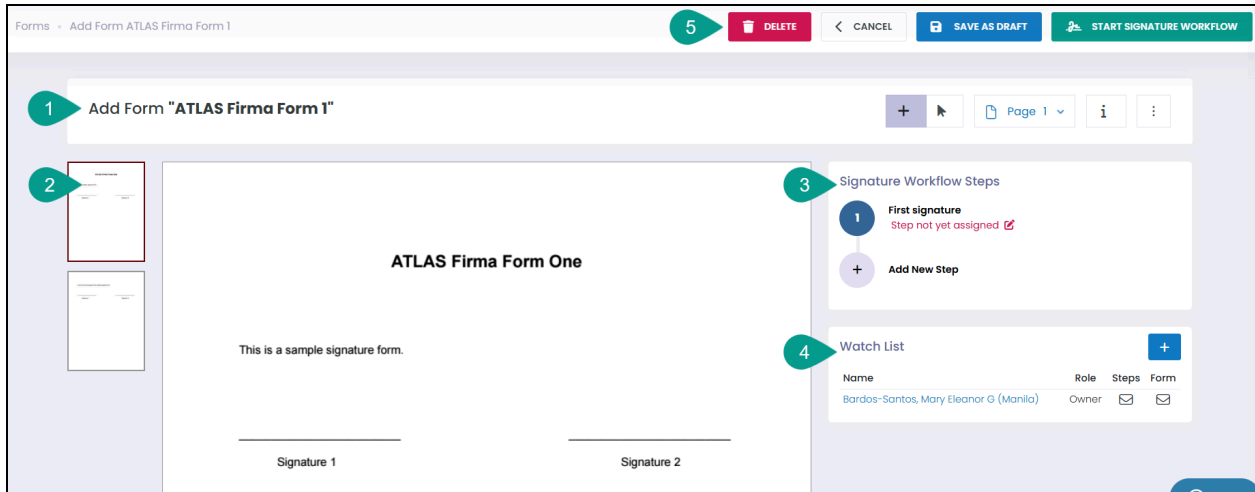
In contrast, the **'Merge and Sign'** option merges all listed documents and directs the user to the beginning of the signature workflow process.



CREATING THE SIGNATURE WORKFLOW

The signature workflow in ATLAS Firma involves specifying who needs to sign the form and in what sequence. This process includes selecting the signers, placing the signature blocks in the correct locations on the form, and determining the signing order.

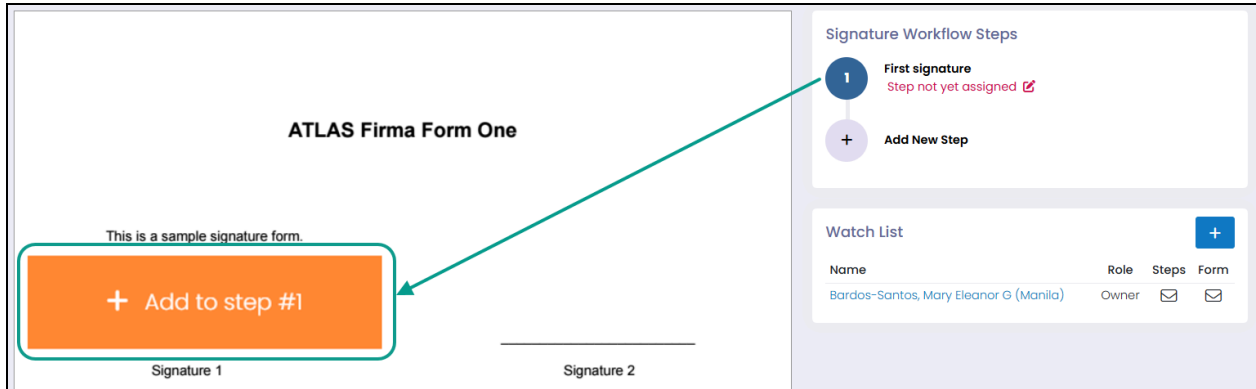
After uploading the form, it will initiate the workflow process and the user will be directed to this page.



1. **Form Information:** This section displays the form's title. By clicking the [i] icon, the user can edit details such as the *form title, filename, description, etc.*
2. **Thumbnail View:** This section shows thumbnail images of the form's pages. Users can click on a thumbnail to view a larger version of the page.
3. **Signature Workflow Steps:** This feature allows users to add signatories to the workflow and establish the signing order.
4. **Watch List Displays:** a list of users who can view the form throughout the signature workflow process.
5. **Form Actions:**
 - a. **Delete:** Enables the user to delete the form. A confirmation window will appear, as this action cannot be undone.
 - b. **Cancel:** allows Functions similarly to the Delete option but does not prompt a confirmation window before deleting the form.
 - c. **Save as Draft:** Allows the user to save the form as a draft. The draft will appear on the dashboard, where the user can open, edit, and start the signature workflow at any time.
 - d. **Start Signature Workflow:** Initiates the signing and routing process after the user has finalized adding signatories.

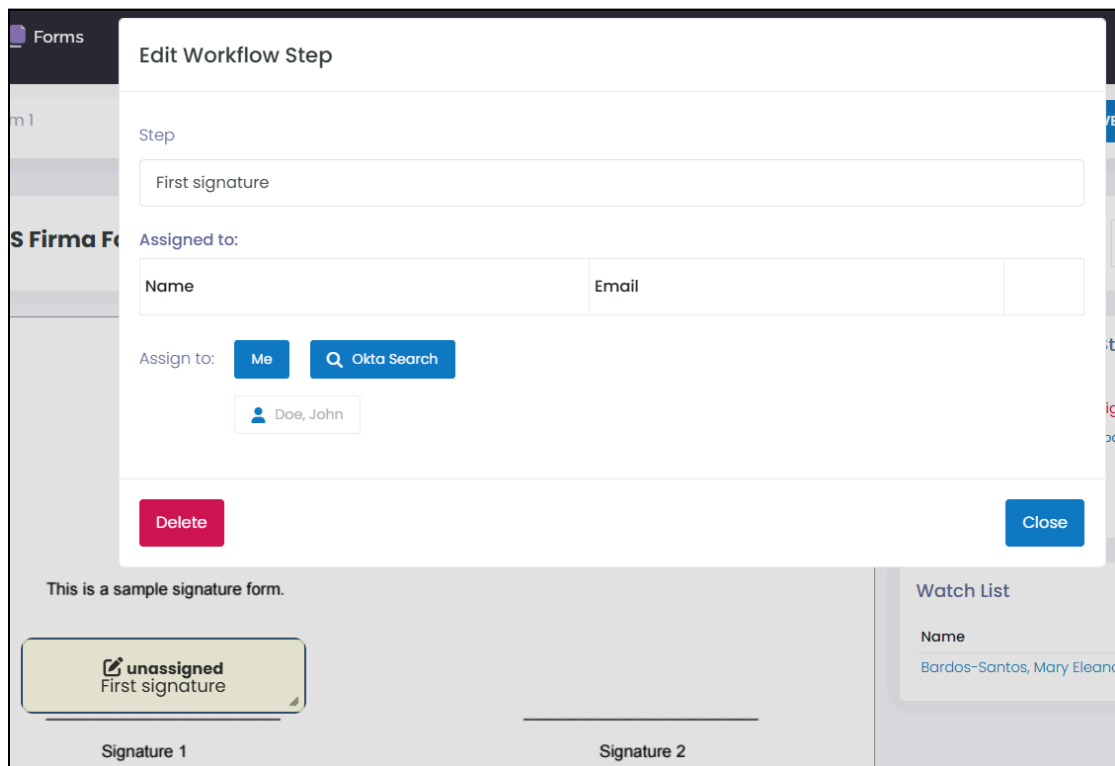
ADDING THE FIRST SIGNATURE STEP

There are two ways for adding signature blocks to a form. First, when creating the initial signature step, the user can hover over the form to display the signature block, represented by an orange rectangle labeled '+Add to step ##.' Alternatively, the user can use the '**Signature Workflow Steps**' panel located on the right side and select the text labeled '**First signature - Step not yet assigned.**'



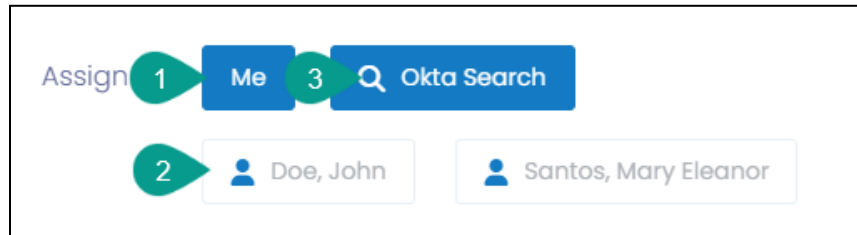
EDITING THE SIGNATURE WORKFLOW STEP

After identifying the correct location of the signature block on the form, click on the left mouse button. This action will open the **'Edit Workflow Step'** window.



The **'Step'** field allows the form owner to rename the signature block. *Example: "Financial Management Officer."*

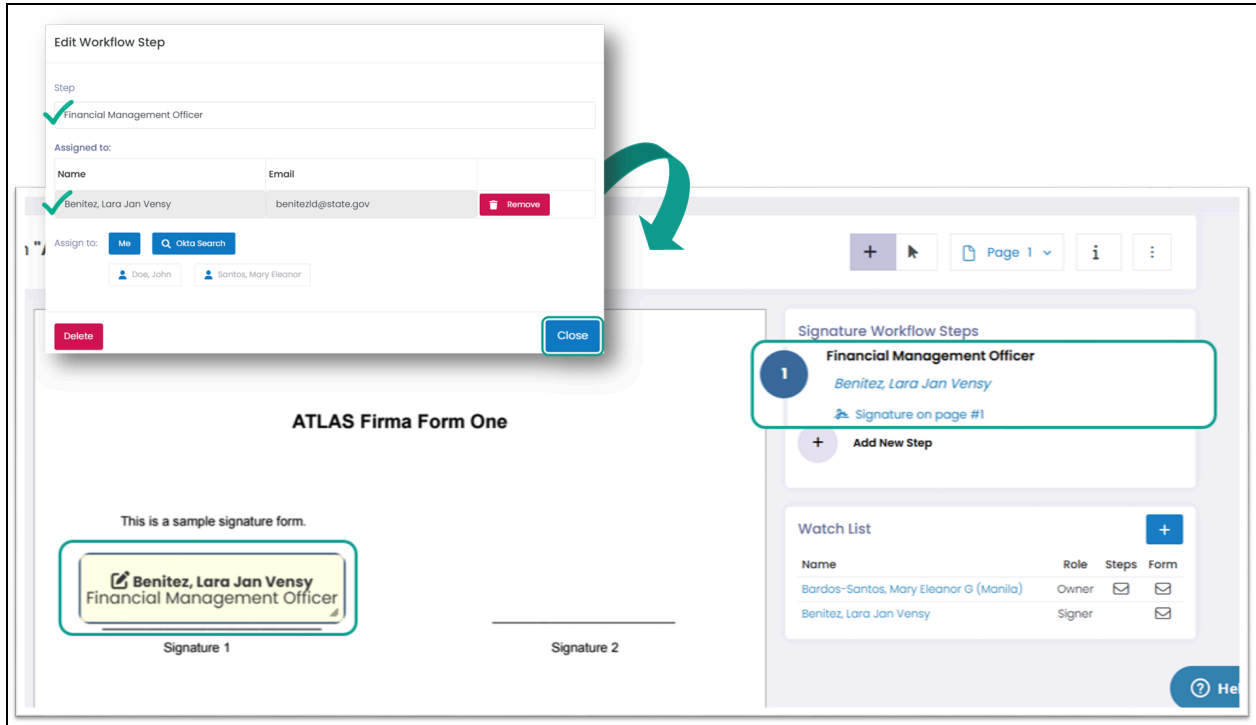
The form owner can assign the signature step in the following ways:



1. Assign the signature step to themselves.
2. Select from the list of users marked as Favorites in the **'User Preferences.'**
3. Use the **'Okta Search'** button to find and assign a specific user.

The screenshot shows the 'Search OKTA Users' interface. At the top, there is a search criteria input field containing 'BenitezLD@state.gov' and a 'Refine Search' button. Below this, there is a 'Show 10 entries' dropdown and a 'Search:' input field. The main area displays a table with columns for Name, Email, Organization, Manager, and Select. A single entry is shown: 'Benitez, Lara Jan Vensy' with email 'benitezld@state.gov'. A 'Select' button is next to the entry. At the bottom, there is a 'Showing 1 to 1 of 1 entries' indicator, a page navigation bar with '1' in the center, and a 'Cancel' button.

Changes in the signature workflow step will reflect in the signature block and in the **'Signature Workflow Steps'** panel. The signer will also automatically be added to the **'Watch List'**.



ADDING MULTIPLE SIGNERS TO THE SAME SIGNATURE STEP

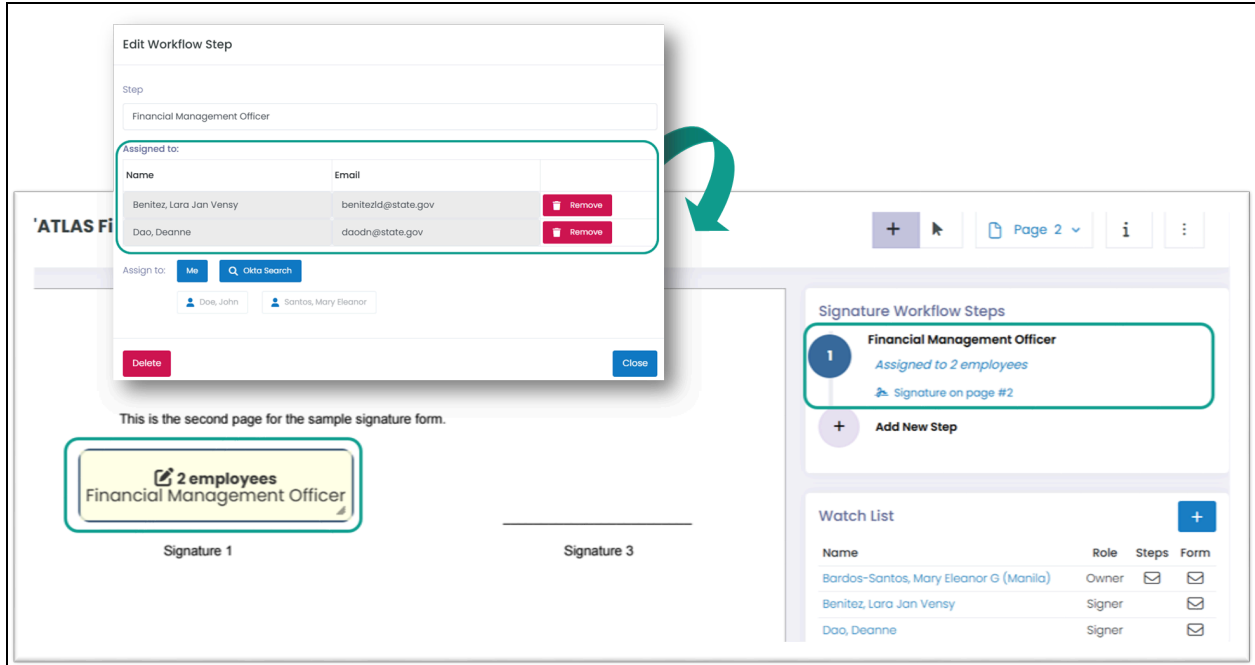
The form owner can assign multiple users to the same signature step, allowing any of the assigned users to sign and complete the step and advance the workflow,

To do this, go to the **'Signature Workflow Steps'** panel and click on the signature step name or title. This will open the **'Edit Workflow Step'** window. Use the 'Okta Search' button to locate the user and click **'Select.'**

To **delete** a signer, locate the name in the **'Assign to'** list and click on the red **'Remove'** button.

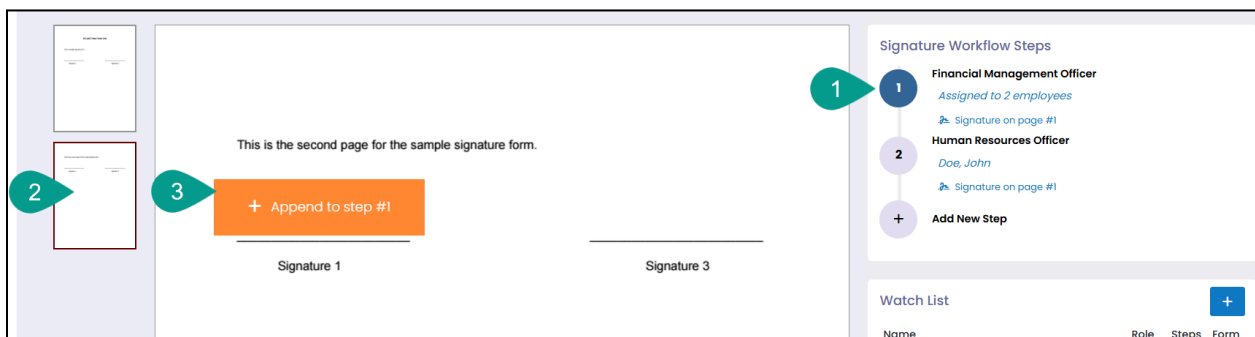
After the form owner has finalized the list of signers for the step, click **'Close.'**

The number assigned signers for the signature step will be displayed in both the **'Signature Workflow Steps'** panel and the yellow signature block.



COPYING THE SIGNATURE STEP

Copying the signature workflow step enables the form owner to duplicate the signature block in a different location on the form. This feature is particularly beneficial for users who need to sign multiple pages of the form, as it allows them to complete all required signatures with a single action.

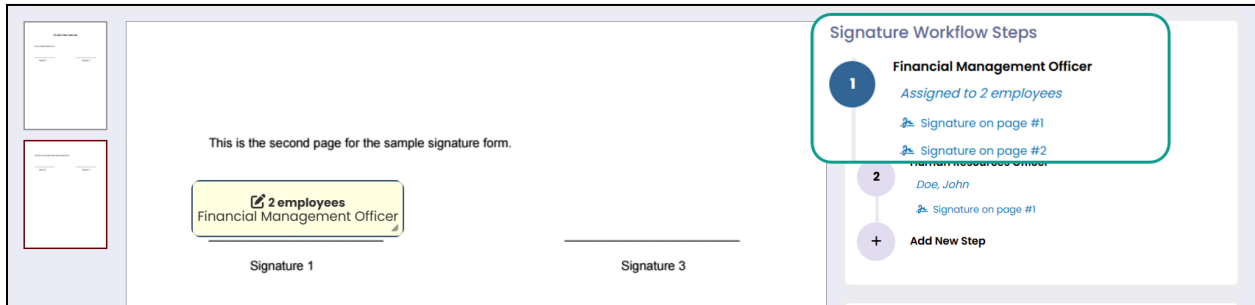


To copy a signature step:

1. Navigate to the **'Signature Workflow Steps'** panel and select the desired signature step. The selected step will be highlighted with a blue background, indicating the step number.
2. Use the thumbnail panel to choose the appropriate page.

3. Hover over the page to display the orange signature block labeled '+Append to step ##.' Locate the appropriate position for the signature block and click the left mouse button to place it.

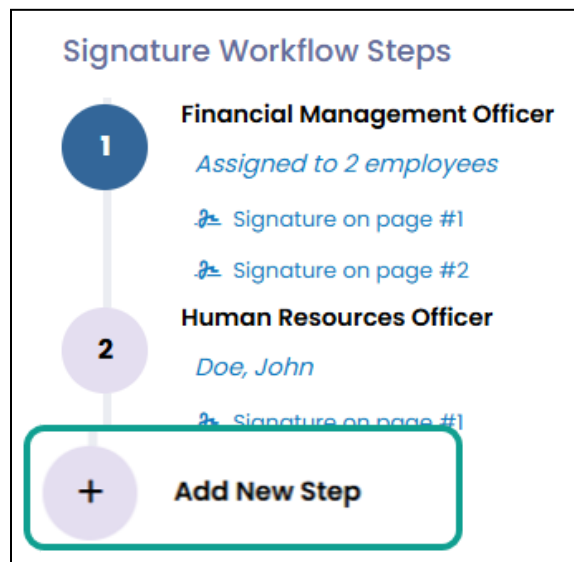
In the **'Signature Workflow Steps'** panel, the signature step will now indicate the pages where the signature block has been added.



CREATING ANOTHER SIGNATURE STEP

When creating an additional signature step, all prior signature steps must be completed before moving to the next step.

To create the new step, navigate to the **'Signature Workflow Steps'** panel and click on **'Add New Step.'**

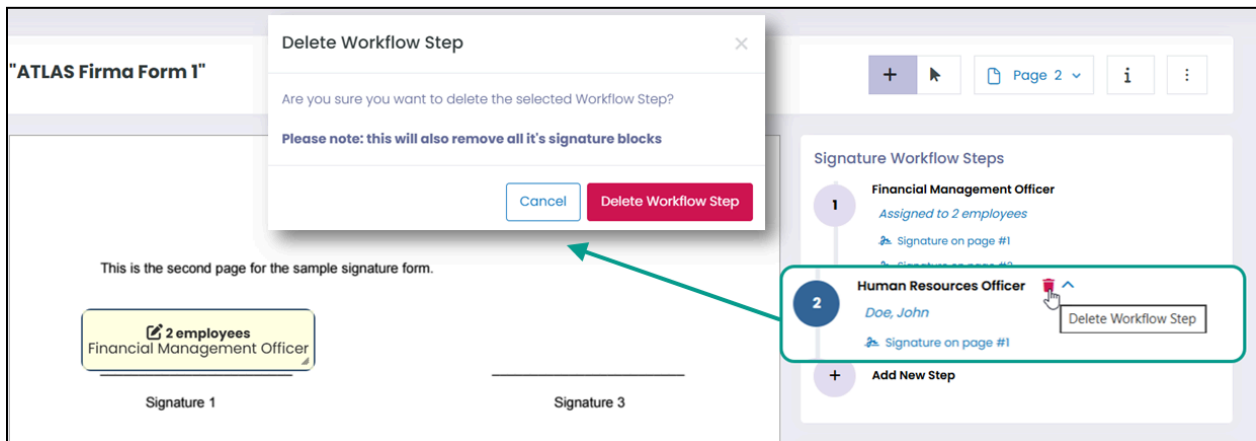


Next, locate the desired position for the signature block on the form and click the left mouse button. Then, select the OKTA user to assign to the next step in the signature workflow.

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

DELETING A SIGNATURE STEP

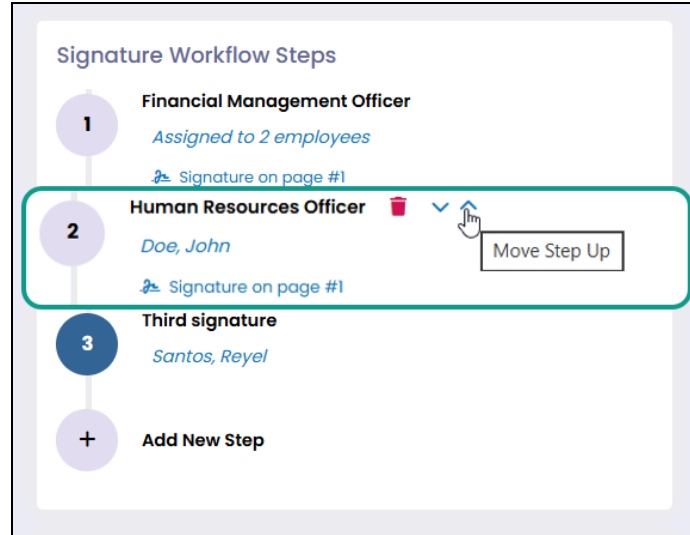
On the **'Edit Form'** page, navigate to the **'Signature Workflow Steps'** panel. Select the signature step to be deleted and click on the red trash icon next to the signature step name. This action will open the **'Delete Workflow Step'** confirmation window. Click the red **'Delete Workflow Step'** button.



The signers of the deleted signature step will be removed from the **'Watch List.'**

REORDERING THE SIGNATURE STEPS

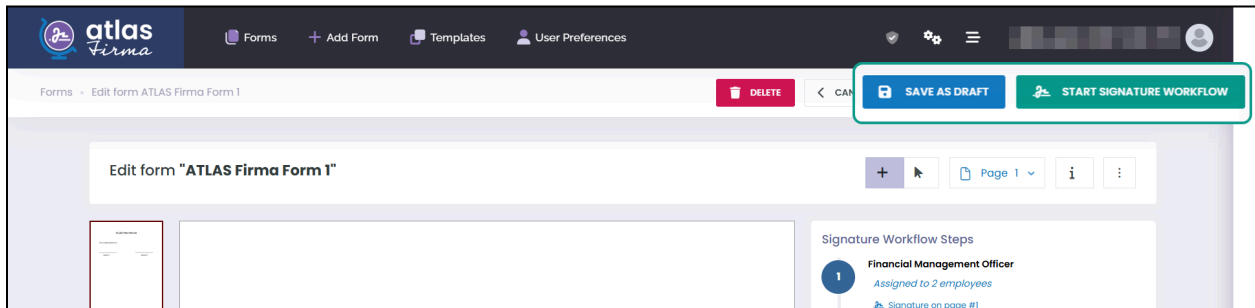
On the **'Edit Form'** page, navigate to the **'Signature Workflow Steps'** panel. Position your mouse near the name or title of the signature step, then click the up or down arrow to adjust the step's position accordingly.



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

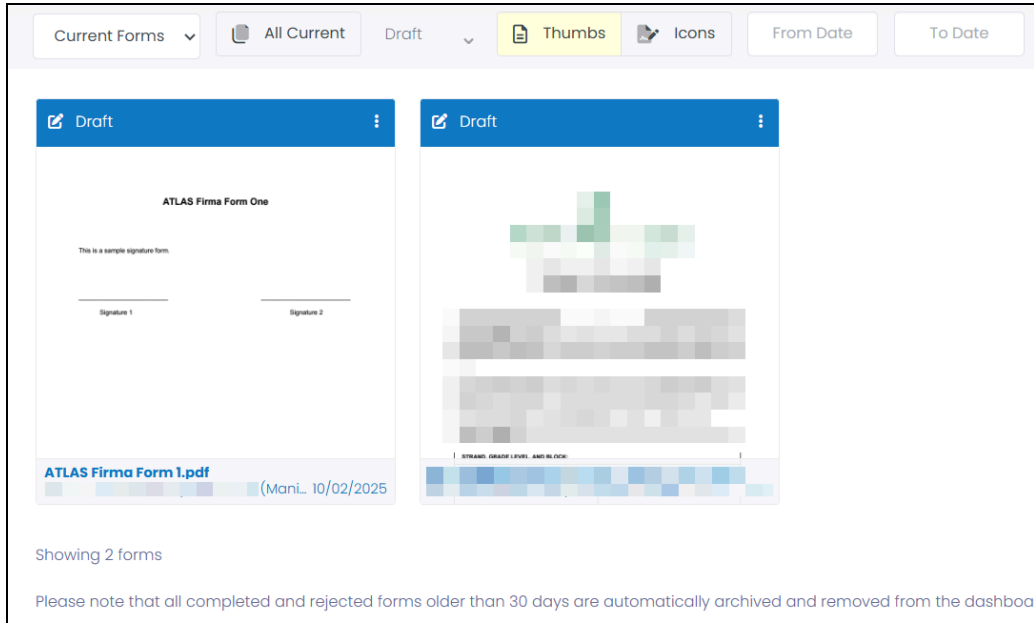
SAVING AND STARTING THE SIGNATURE WORKFLOW

After placing all the signature blocks, the user can select one of the following actions:



SAVE AS DRAFT

- This option allows the user to save the form in its current state without initiating the signature process.
- The user can return to the form later to make edits or finalize it before proceeding.
- This is useful for situations where the form is incomplete or requires further review before submission.
- The form will appear in the dashboard with a blue banner labeled "DRAFT." The form's thumbnail or icon will also include the name of the form owner and the date it was uploaded.



START SIGNATURE WORKFLOW

- This will trigger the signature workflow process. The first signer/s of the form will receive an email notification that there is a form pending their action.

THE WATCH LIST

ATLAS Firma's Watch List includes a list of users who can monitor a form's progress throughout the signature workflow lifecycle. Additionally, Owners can share the form with other users by assigning them roles such as **Owner**, **Signer**, or **Viewer**.

| Name | Role | Steps | Form |
|--|--------|-------|------|
| Bardos-Santos, Mary Eleanor G (Manila) | Owner | ✉ | ✉ |
| Benitez, Lara Jan Vensy | Signer | | ✉ |
| Dao, Deanne | Signer | | ✉ |
| Ramos, Mary Grace | Viewer | | ✉ |

The Watch List panel displays the name of each watcher, their role in the form—whether as an **Owner**, **Signer**, or **Viewer**—and whether they are set to receive email notifications for each signature step or only upon the completion of the signature workflow process.

ROLES

OWNER

The owner is the individual who uploaded the form. They are responsible for placing and assigning the signature blocks and initiating the signature workflow process. The owner will receive email notifications at each completed step of the signature workflow and upon the form's completion of the entire process.

SIGNER

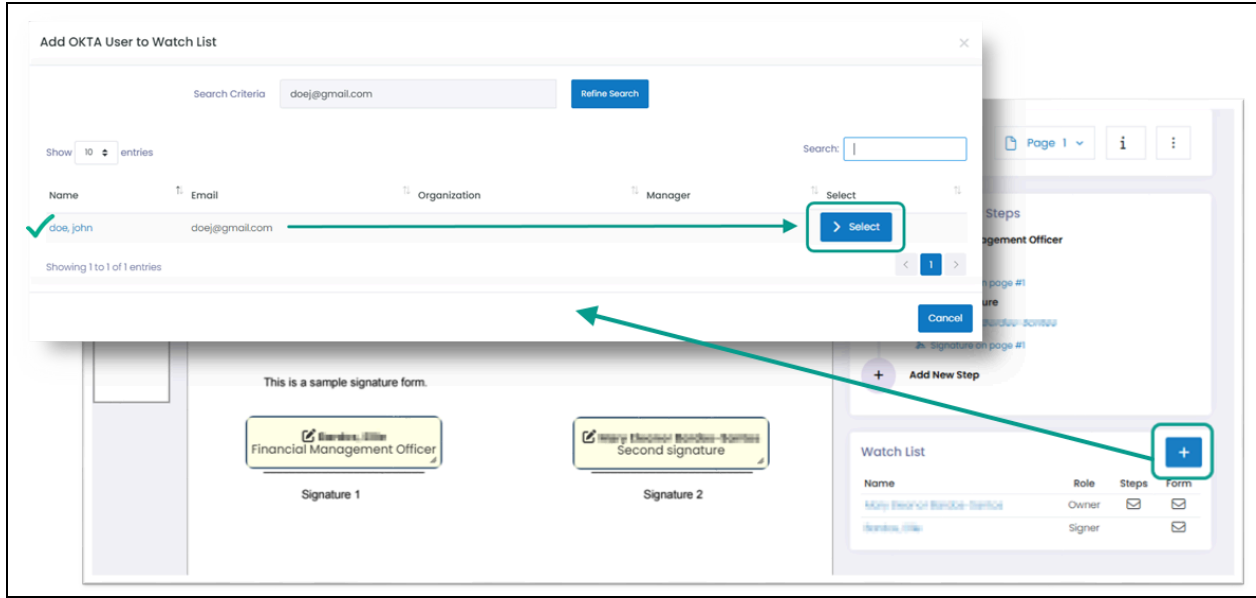
This individual has been assigned to take action on the form. The signer may sign, reject or reroute the form to another signer. They will receive an email notification when the form is routed to them and requires their action. Additionally, they will be notified once the form, in which they hold a role, has successfully completed the signature workflow process.

VIEWER

The Viewer can track the entire signature workflow process but cannot take any actions on the form. By default, they will receive an email notification when the form has completed the signature workflow process.

ADDING A WATCHER

As the form owner, they can add a role to a person on the form. From the watchlist panel, they can click on the blue plus icon and they can search for a specific OKTA user.



Locate the user from the list and click the **'Select'** button.

EDITING WATCH LIST PROPERTY

When the form owner adds a watcher, the **'Edit Watch List Entry for <name>'** window will appear.

Edit Watch List Entry for doe, john

Email:

Role:

Form Owner:

Notify Completed Steps:

Notify Completed Form:

Delete Close

By default, the user is assigned the role of **'Viewer'** and will receive an email notification once the form has completed the signature workflow process.

In this window, the form owner can modify the user's properties by toggling the following options:

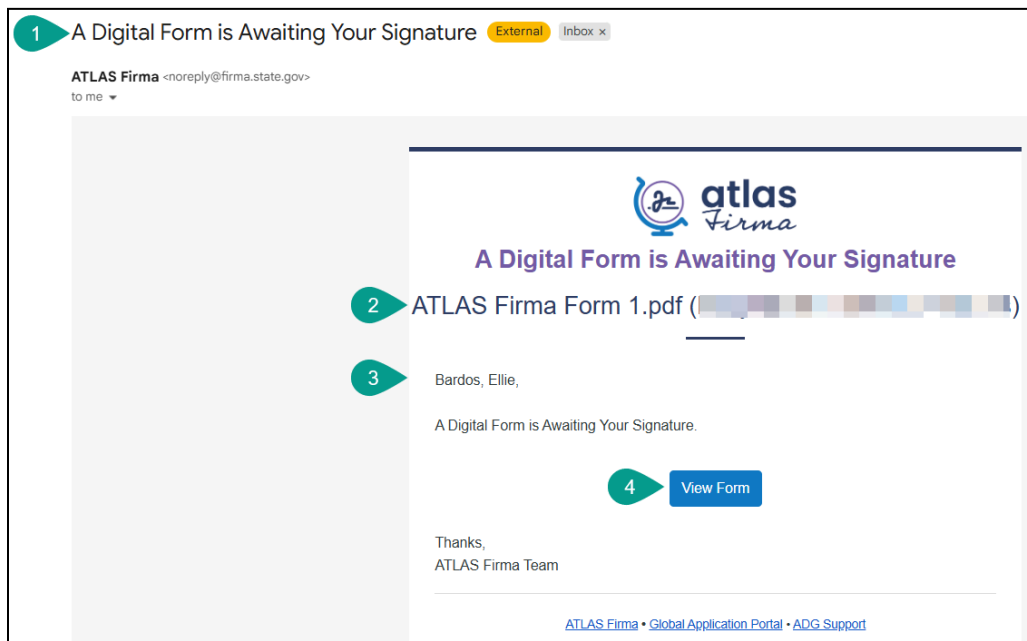
1. **Form Owner:** Changes the user's role from Viewer to Form Owner, granting them the same permissions as the form owner.
2. **Notify Completed Steps:** Enables email notifications for the user after each completed step in the signature workflow process.
3. **Notify Completed Form:** Sends an email notification to the user once the form has completed the signature workflow process.

The form owner can assign a Viewer or Form Owner at any stage of the signature workflow process. Additionally, the owner has the ability to edit or remove individuals from the Watch List panel. To make changes or delete an entry, simply click on the individual's name within the Watch List panel.

- Only the Form Owner can edit the Watch List property, including the email notifications of each individual in the Watch List panel.

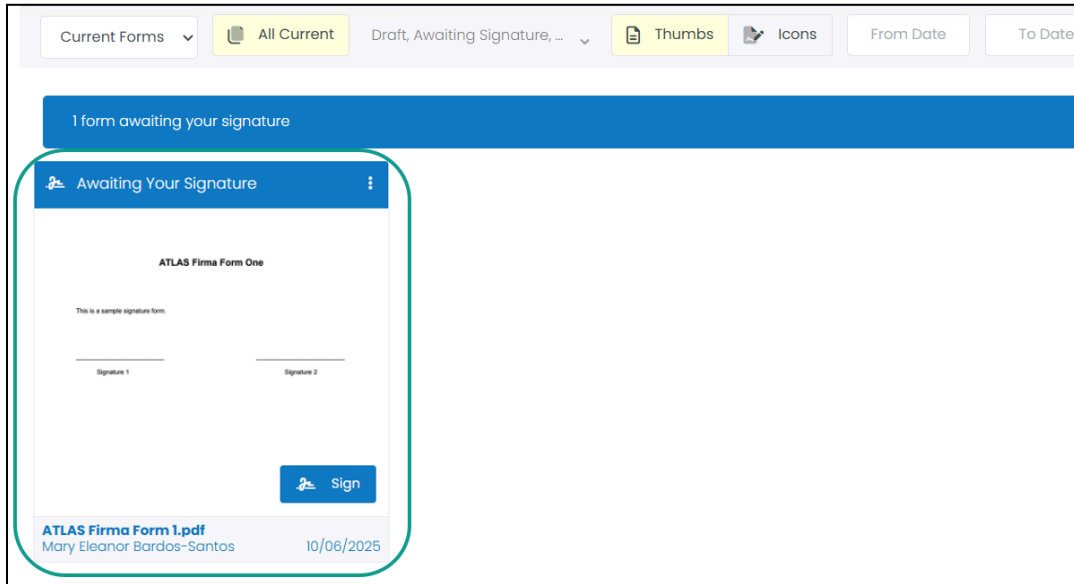
SIGNING THE FORM

The signer will receive an email notification indicating that a form requires their action. The email will include the following details:



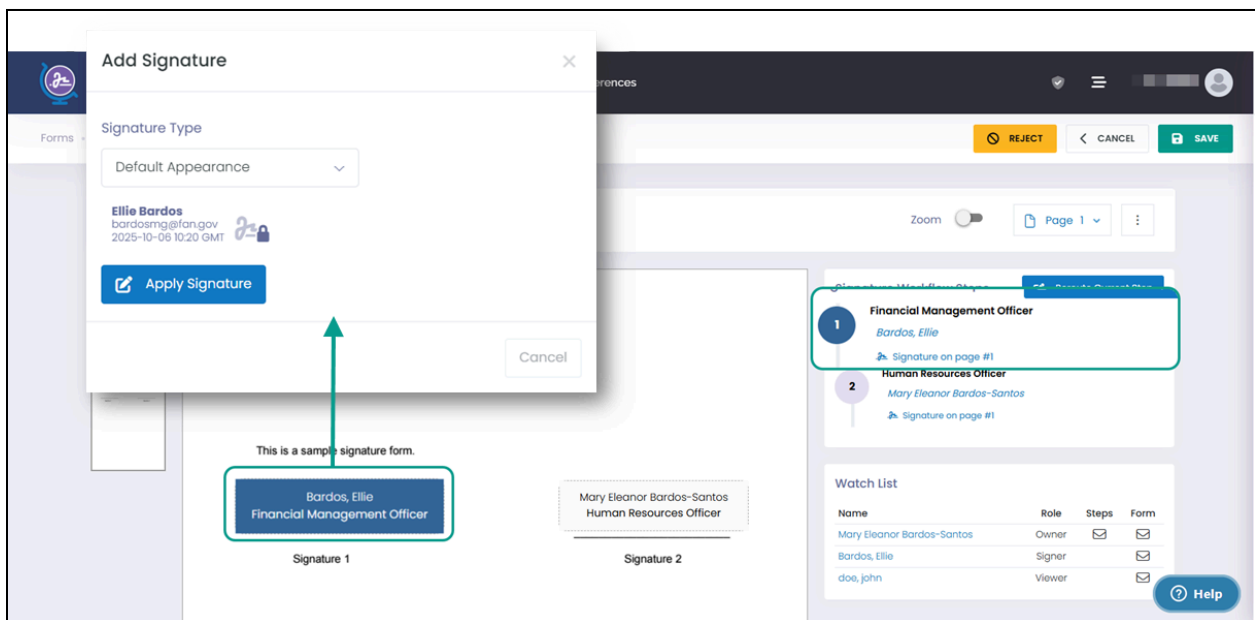
1. **Subject Line:** 'A Digital Form is Awaiting Your Signature'
Sender: ATLAS Firma <noreply@firma.state.gov>
2. **Body:** The file name of the form, along with the name of the form owner in parentheses.
3. **Salutation:** Addressed to the current signer by name.
4. **View Form:** Click on the button to directly access the form.

Alternatively, the user can navigate to the dashboard.



A blue banner notification will appear, stating, '**# form awaiting your signature.**' The form's icon or thumbnail will be displayed in the center of the dashboard with a blue banner labeled '**Awaiting Your Signature.**' The user can click on the thumbnail to sign the form.

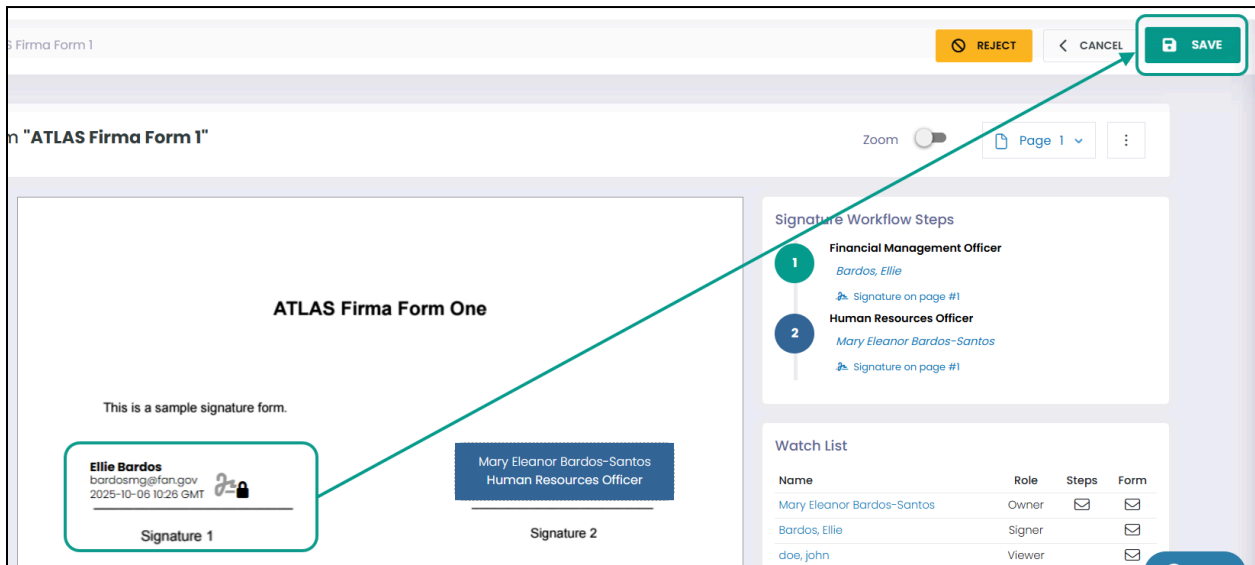
On the 'Sign Form' page, the current signer can identify the step number in the '**Signature Workflow Steps**' panel, which is highlighted with a blue background. Additionally, signature blocks requiring their action are clearly marked with a blue banner for easy identification. Click on the blue signature block and the '**Add Signature**' button will appear



The window will show a preview of the current signer's signature. Additionally, the signer may change the appearance of the signature from the '**Signature Type**' dropdown field.

Click the **'Apply Signature'** button.

The current signer's signature will appear in the designated signature block. To save the signature and advance the workflow, click the **'Save'** button.



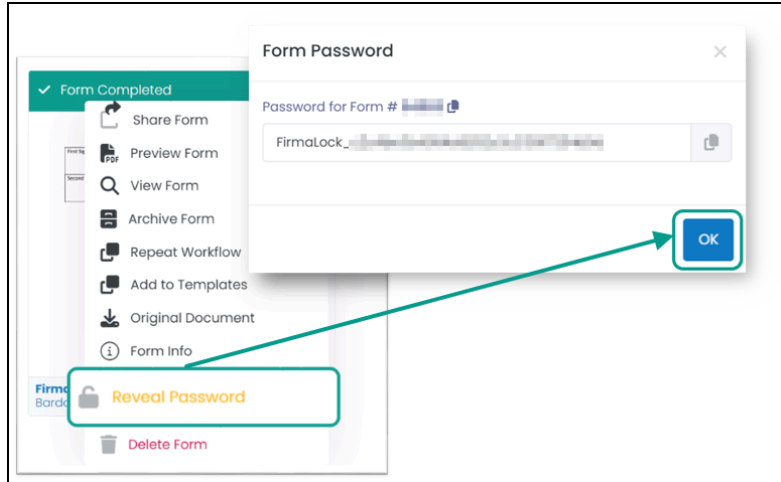
The form owner will receive an email notification confirming the completion of the current signature step.

If there is another signer, they will be notified via email that the form is awaiting their action. If no additional signers remain, the form owner and all individuals on the Watch List will receive an email notification indicating that the form has successfully completed the signature workflow process.

- Forms that have completed the signature workflow are automatically set to **read-only** and are password-protected upon download. Only the Form Owner has the ability to retrieve the password for their completed forms.

RETRIEVING THE FORM PASSWORD

On the **'Forms'** dashboard, locate the form that has status **'Form Completed.'** Click on the vertical ellipsis and select **'Reveal Password.'**



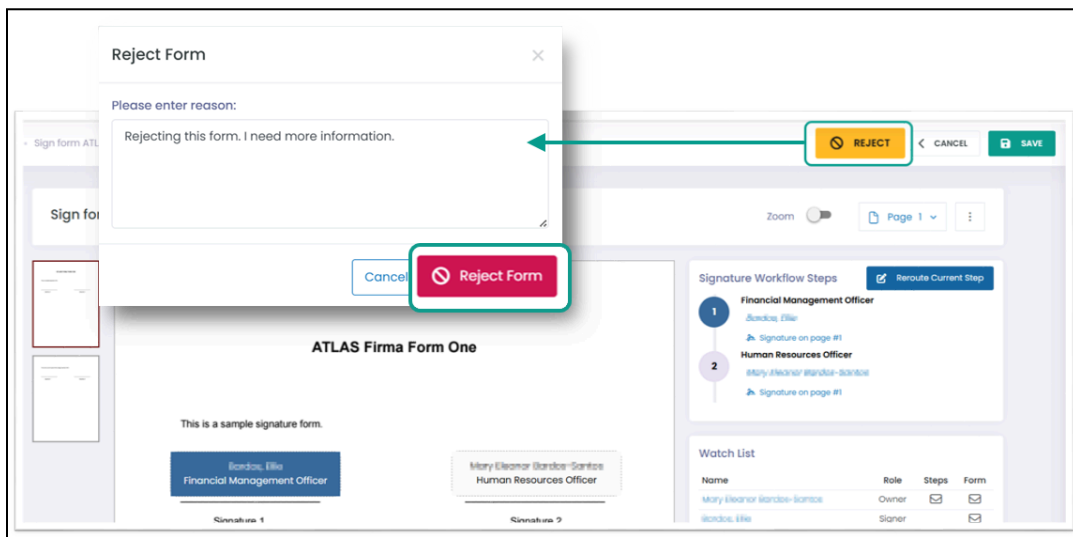
In the **'Form Password'** window, click on the Copy icon to copy the password.

REJECTING THE FORM

The signer in the current step of the signature process can choose to reject the form. When a form is rejected, the signature workflow is terminated, and an email notification is sent to the signer, the form owner, and all individuals on the Watch List.

On the ATLAS Firma dashboard, locate the form with the status **'Awaiting Signature'** to be rejected. Select the form to open the **'Sign Form <Name of Form>'** page.

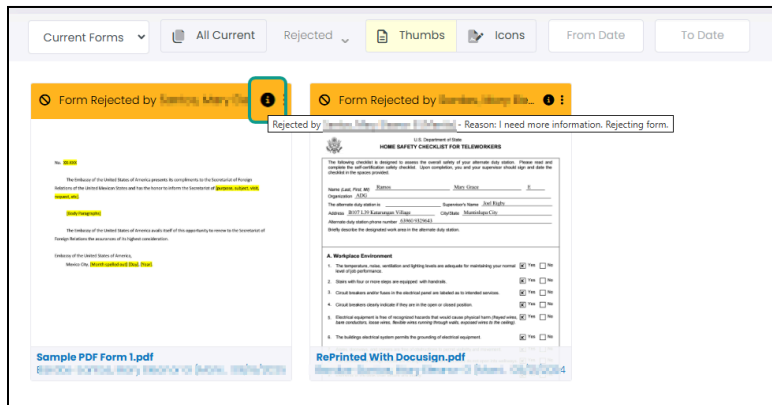
Within the **'Sign Form <Name of Form>'** page, click the yellow **'Reject'** button. This action will open the **'Reject Form'** window, where the signer must provide a reason for the rejection. After entering the reason, they can finalize the action by clicking **'Reject Form.'**



- Only the Signer of the current signature step and Form Owner can reject the form.

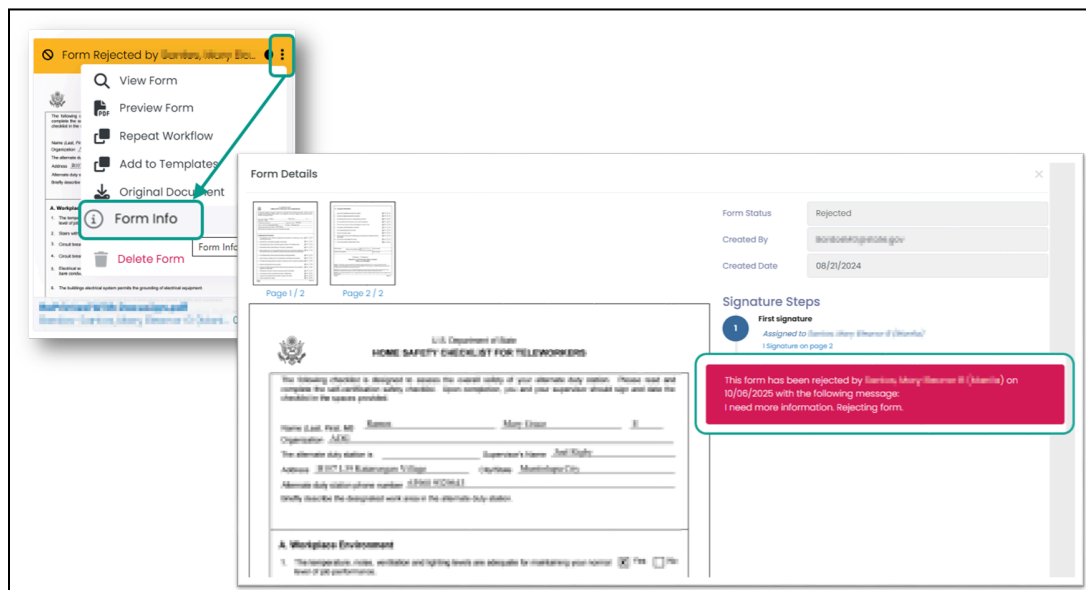
VIEWING REJECTED FORMS AND COMMENTS

On the dashboard, rejected forms are marked with a yellow banner on the form thumbnail, labeled **'Form Rejected,'** followed by the name of the signer who rejected the form.



The rejection comment can be viewed in three ways:

1. When a form is rejected, an auto-generated email is sent to the signer, the form owner, and viewers. The email body includes the rejection comment.
2. On the ATLAS Firma dashboard, locate the rejected form and hover over the information (i) icon. The rejection comment will appear.
3. On the ATLAS Firma dashboard, find the rejected form, click the ellipsis, and select **'Form Info.'** In the **'Form Details'** window, the rejection information is displayed within a red box.

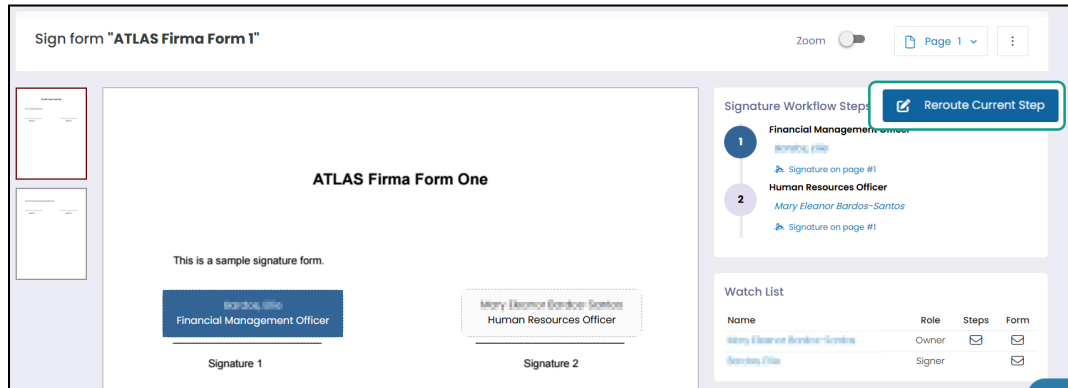


REROUTING THE FORM

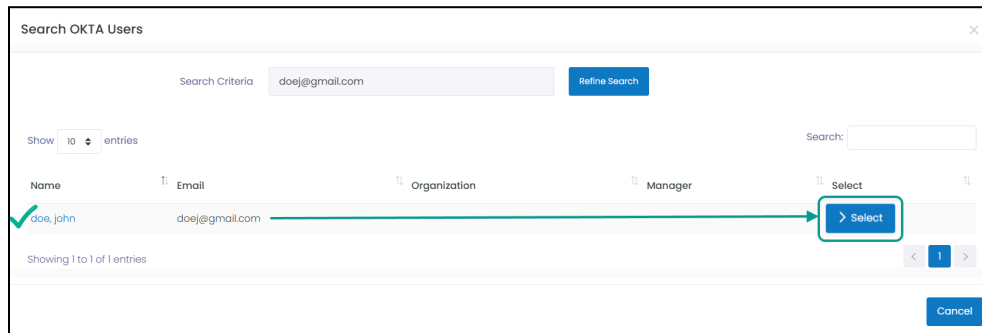
Rerouting the form allows the Form Owner or the current Signer to reassign the signer for the current signature step.

To reroute:

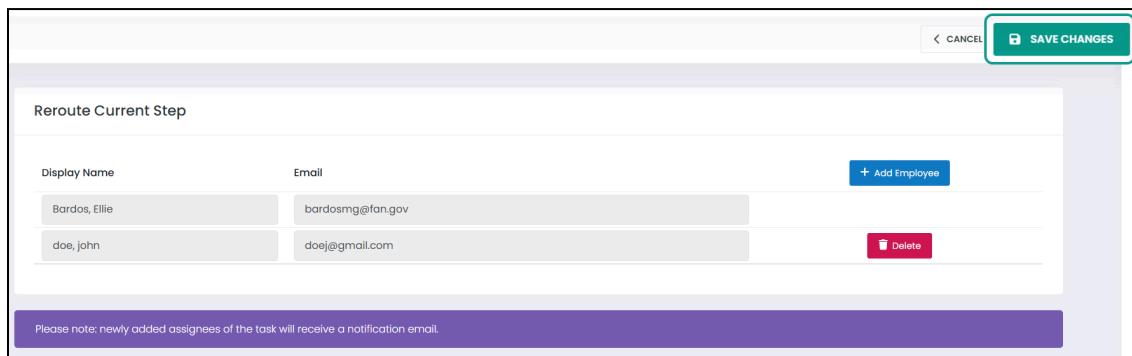
1. On the **'Sign Form'** page, click the **'Reroute Current Step'** button.



2. In the **'Search OKTA Users'** window, search and locate the new signer and click **'Select.'**

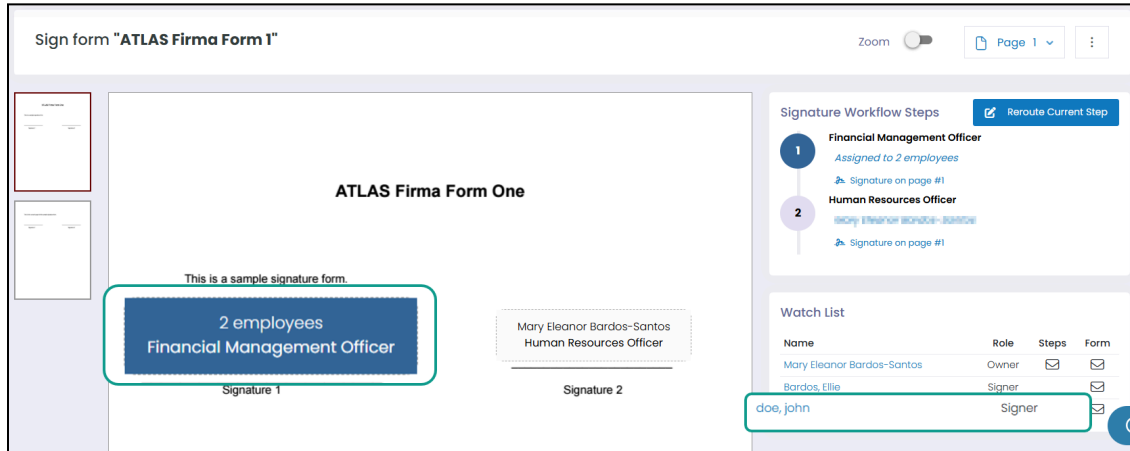


3. On the **'Reroute Current Step'** page, confirm the selected user is listed, then click **'Save Changes.'**

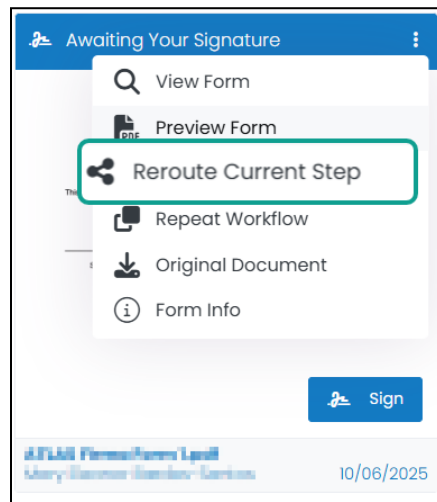


Newly added signers of the signature step will receive an email notification.

4. On the **'Sign Form'** page, The signature block will now reflect the updated signer/s, who will also appear in the **'Signature Workflow Steps'** and **'Watch List'** panels.



Alternatively, the current signer or form owner can reroute a form directly from the dashboard by selecting the ellipsis on the form's thumbnail.

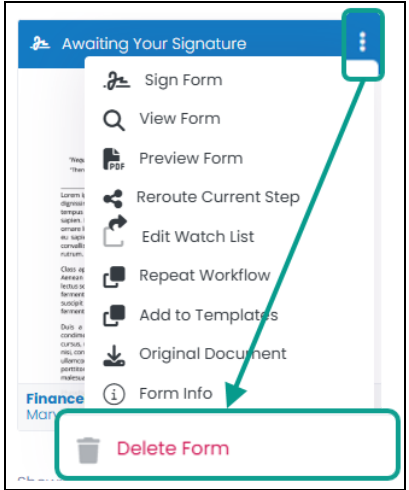


- Only the form owner can delete the originally assigned Signer for the signature step.

DELETING A FORM

The Form Owner has the ability to delete a form at any stage, regardless of its status.

To delete a form, navigate to the dashboard, find the form thumbnail, and click the ellipsis. From the actions available, select **'Delete Form.'**

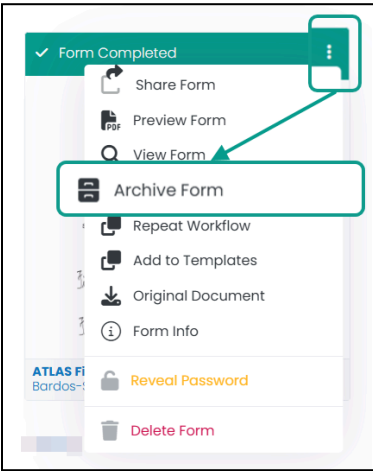


Deleted forms can be found when the user clicks the **'Recently Deleted Forms.'** Forms will remain in the system for 30 days, accessible to the form owner, signer, and all individuals on the watchlist, before being permanently removed from the application.

- Only the form owner can delete a form.

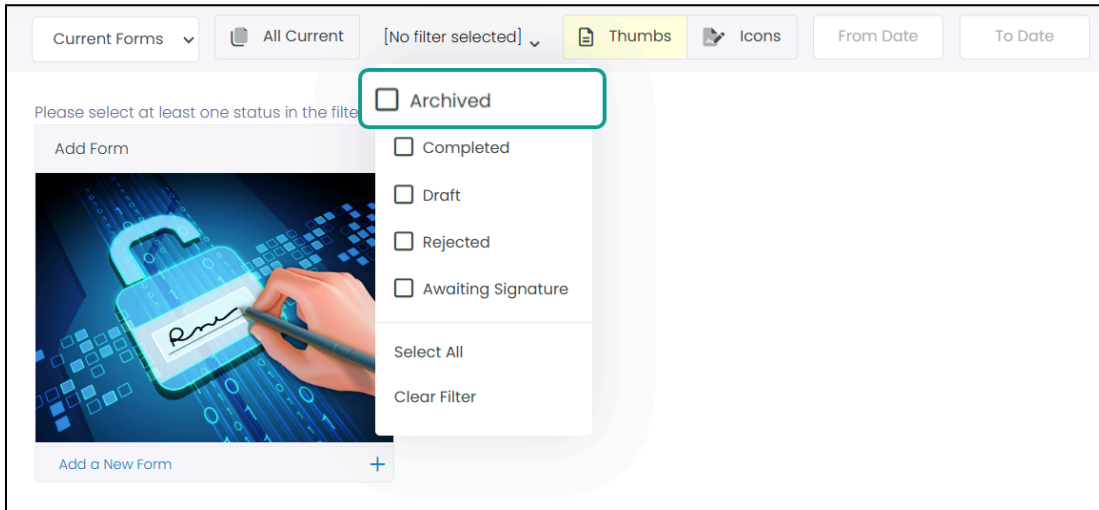
ARCHIVING A FORM

In the ATLAS Firma dashboard, find the form with the status **'Form Completed.'** Click the vertical ellipsis next to the form, then select **'Archive Form'** from the dropdown menu.

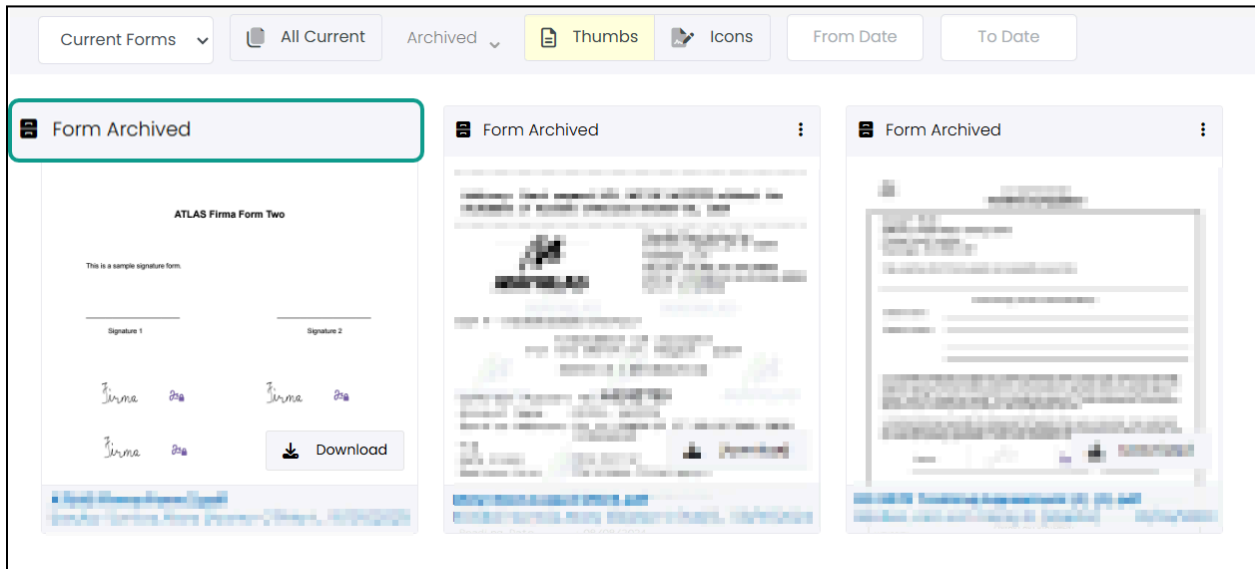


When the **'Please Confirm Operation'** window appears, click the blue **'OK'** button to confirm.

In the **Forms** dashboard, locate the **Filters** dropdown list and select the **Archived** checkbox.



Archived forms can easily be identified by having a white banner with a Signature Workflow Status **Form Archived**.

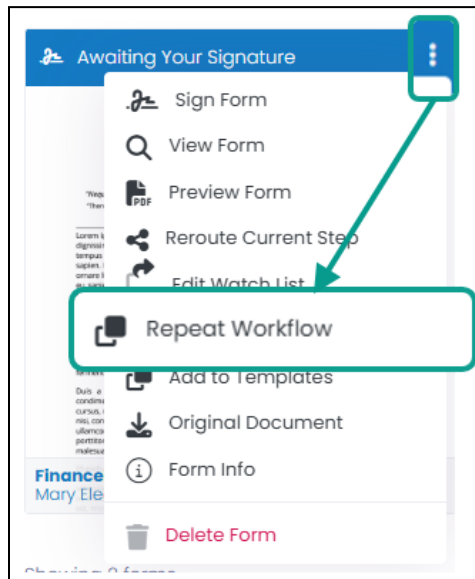


- Completed and rejected forms older than 30 days are automatically archived from the **Forms** dashboard. Forms that were automatically archived the system will maintain the status **Form Completed**.

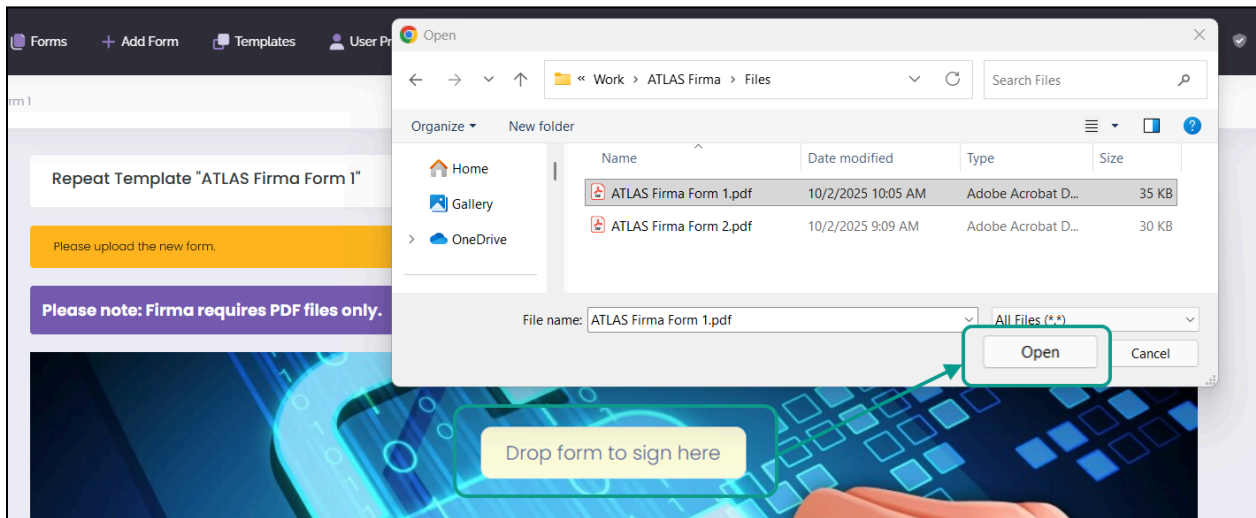
REPEATING A WORKFLOW

This feature allows users to replicate an existing signature workflow process to a new form.

To repeat a workflow, navigate to the dashboard, locate the form image or thumbnail, and click the vertical ellipsis. From the available actions, select **'Repeat Workflow.'**



The user will then be prompted to upload a new, unsigned form.



Once the new form is uploaded, all previously configured signature steps and signature block placements will be automatically replicated in the new form.

The user then has options to edit the form, save as draft, or start the signature workflow process.

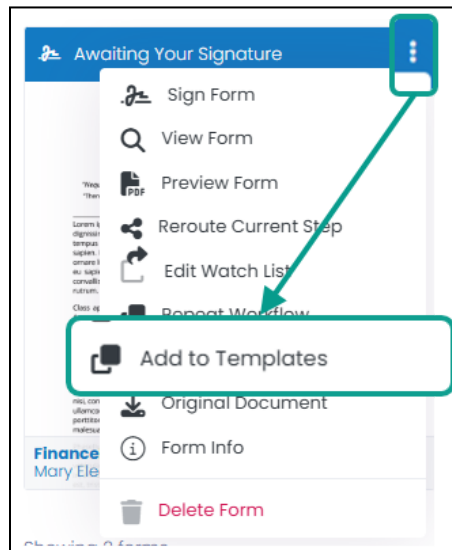
TEMPLATES

The templates feature allows the user to save an existing signature workflow process of a form. Once saved as a template, it can be accessed and reused whenever needed, eliminating the need to repeatedly configure the same fields and recipients for each new document sent for signature.

For example, if an employee frequently works overtime, they may need an overtime form signed by the same individuals on multiple occasions. In such scenarios, the user can take advantage of the "Templates" feature.

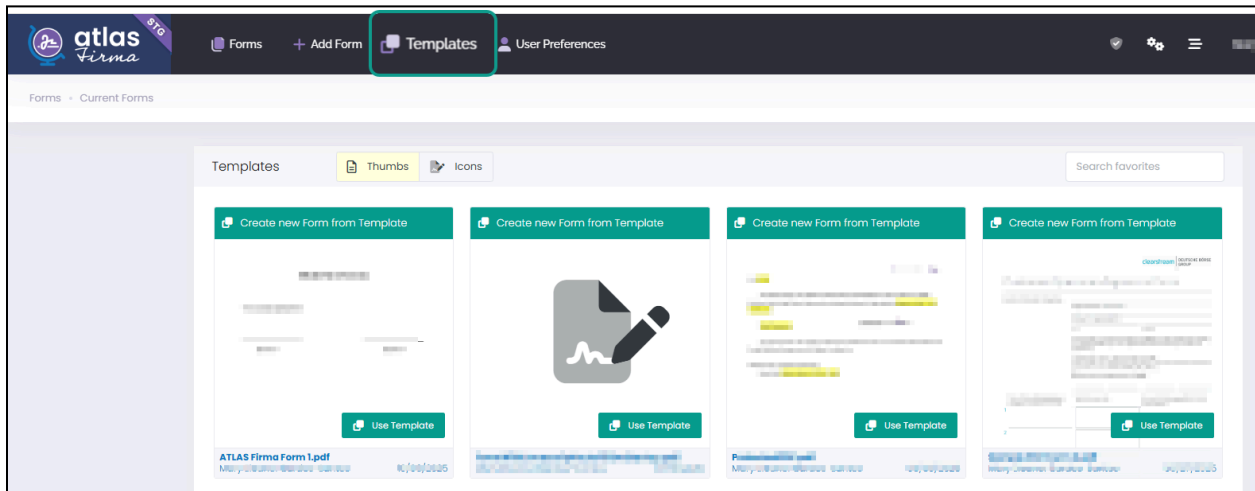
ADDING A NEW TEMPLATE

To add a form as template, navigate to the dashboard, locate the form image or thumbnail, and click the vertical ellipsis. From the available actions, select **'Add to Templates.'**

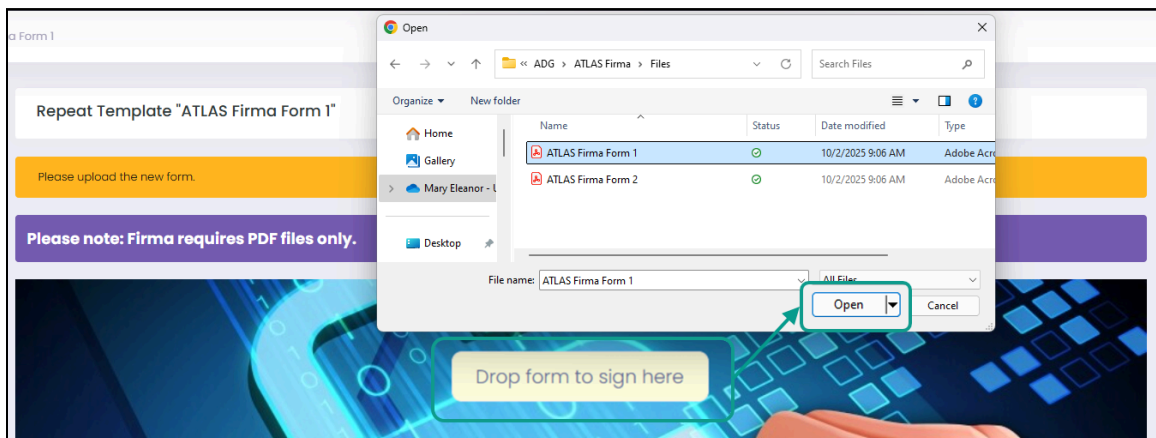


VIEWING/USING A TEMPLATE

To access the Templates, go to the header and click on **'Templates.'**



From the **'Templates'** page, locate the form thumbnail and click on the image. The user will be asked to upload a new unsigned form.

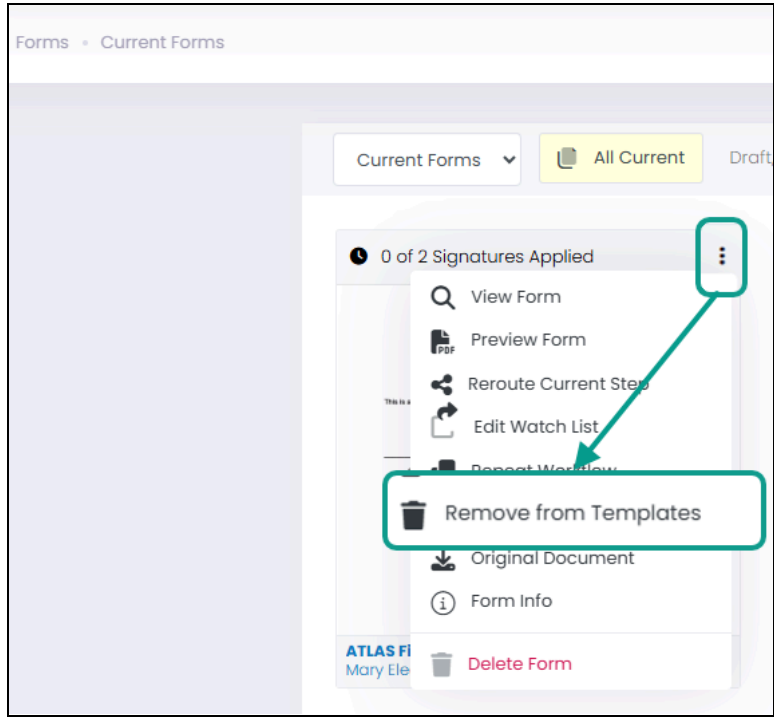


Once the new form is uploaded, all configured signature steps and signature block placements created for this template will be automatically replicated in the new form.

The user then has options to edit the form, save as draft, or start the signature workflow process.

REMOVE A TEMPLATE

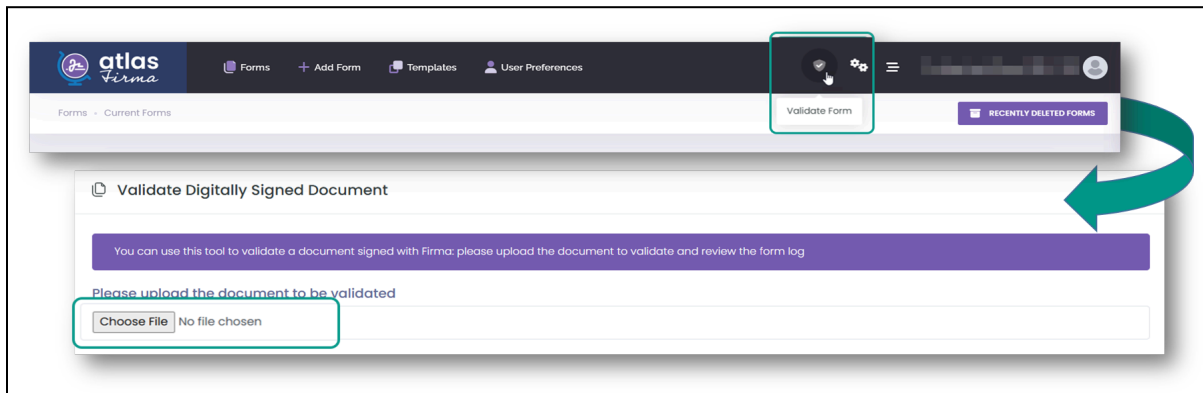
To remove a form from the **'Templates'** menu, go to the **Templates** tab, locate the form thumbnail and click on the vertical ellipsis. From the actions available, select **'Remove from Templates.'**



VALIDATING A FORM

The **Validate Form** feature helps users confirm if a form was signed using ATLAS Firma. It also checks if any changes were made after the signature process was completed and the form was downloaded. This ensures the integrity of documents signed with ATLAS Firma.

To validate a **completed** form, click the **Shield** icon, select the file to upload.



In the **Validate Digitally Signed Document** page, the user can view the document details and the signature workflow activity log.

Validate Digitally Signed Document

The uploaded document is valid

File Name: ATLAS Firma Form 1.pdf

Form Id: 201061

Form Status: Completed

Created By: @state.gov

Created On: 10/2/2025 3:05:19 AM

Step #1 completion information (1 signature applied): on 10/17/2025

Step #2 completion information (1 signature applied): on 10/17/2025

Form Activity Log History

Excel CSV Copy Columns Search:

| Date | User | Activity | Details |
|---------------------|------------|--------------------|---|
| 10/02/2025 11:05 AM | @state.gov | Draft Created | |
| 10/17/2025 09:57 AM | @state.gov | Workflow Started | |
| 10/17/2025 09:59 AM | @state.gov | Signature Applied | Signature #1 on page #1 for step #1 has been applied by @state.gov |
| 10/17/2025 09:59 AM | @state.gov | Other Activity | |
| 10/17/2025 10:00 AM | @state.gov | Signature Applied | Signature #2 on page #1 for step #2 has been applied by @state.gov |
| 10/17/2025 10:00 AM | @state.gov | Step Completed | Step #2 Completed by @state.gov and Form Status changed from WaitingForSignature to Completed |
| 10/17/2025 10:00 AM | @state.gov | Workflow Completed | |

Show 10 entries Showing 1 to 7 of 7 entries

A purple banner with the message 'The uploaded document is valid' appears at the top when the signature process is successfully completed using ATLAS Firma.

And at the bottom of the page, the user can preview and download the form.

