Organization Settings

Here you can change your organization settings. Note: In the list below you can find just some information to introduce the feature. You can click on the headline of the feature to get to the detailed explanations.

- Organization Details
- Default Callback URL
    - If you set a callback, every finished or changed envelope will cause a request on your defined URL. With this URL you can add your own service for e.g. performing an automatic archiving via eSAW API. If the URL is empty no callback is fired on finish or change of the envelope. More details about the callbacks are available in our API Reference - SOAP and below this enumeration as a separate chapter.
        - Placeholder for envelope complete callback: **##EnvelopeId##** and **##Action##** (only *envelopeFinished* action available)
        - Placeholder for envelope status change callback: **##EnvelopeID##** and **##Action##** (workstepFinished, workstepRejected, workstepDelegated, workstepOpened, sendSignNotification, evnelopeExipired, workstepDelegatedSenderActionRequired)
- Design of the document viewer for recipients
    - Set a default redirect URL for finished documents
    - Upload and download designs
    - Information about the biometric encryption key
- Disposable Certificate
    - Configuration of the LRA to use the disposable certificates. Settings for LRA credentials, certificate type and disclaimer usage.
    - Configure disposable type
- SwissCom OnDemand Certificate
    - Configuration for the SwissCom OnDemand Certificate v 3.3
    - SwissCom OnDemand Certificate UI configuration v 21.27
- BankId Authentication v 3.4
    - Set the authentication certificate
- Generic Signing Plugins v 20.42
    - Configure the signing plugin
- Notification Plugins
    - Configure notification plugins
- Policy for the document viewer for recipients
    - Upload and download the default policy for the document viewer for recipients
- Retention Period
    - Enable Retention Period of Organization Drafts and Envelopes. This will automatically delete envelopes after a certain time, when they reached a final state (expired, finished, canceld). Please note that templates are not affected by the retention period.
- Backup
    - Download all finished envelopes. A backup-process will be started and you will be informed if the backup is ready for download.
- Due its complexity of the configuration, we highly recommend you to contact us about the SAML configuration.
    - Add provider for the SAML signer authentication
    - Examples of Use Cases
        - ADFS integration for eSAW backend users
        - Signer authentication with external SAML service

- SAML Settings for User Authentication v 3.2
    - Add provider for the SAML user authentication
- Recipient Settings
    - Set the recipient settings of your organization
- Default Signature Settings
    - Default signature method (preselected)
    - Imprint settings, such as font-type, font-size, date-format
    - Biometric signature batch configuration (allow usage of biometric signature over different physical documents). Check with your legal consultant about its usage (default is disabled)
    - Settings for draw to sign signatures
- Envelope Defaults
    - default organization settings about reminders for signers
- Audit Log Settings
    - Settings of the audit log (audit trail). It is not recommended to disable the audit-log, because it is an important evidence (see signature guide).
    - Settings for separate logs per document
- Email Settings
- User Logout Redirect Url
- Envelope Details Page
- Signature PAdES (PDF Advanced Electronic Signature) Configuration

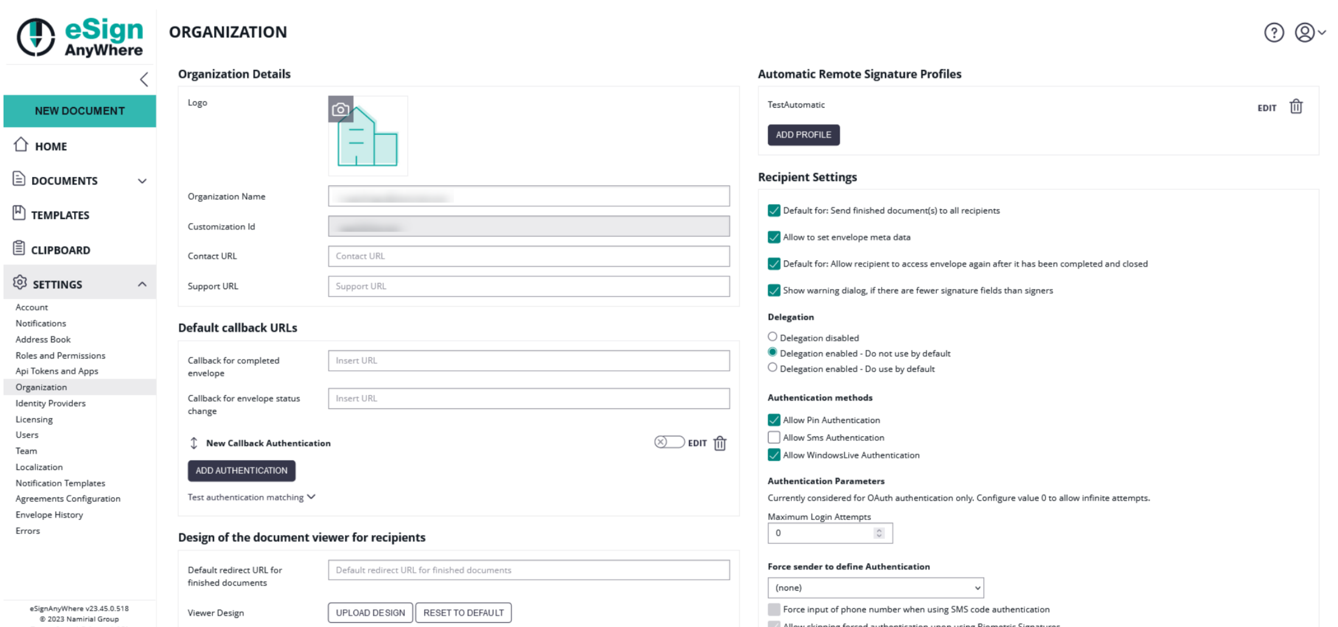
Note that the following configuration items have been moved to other pages inside the Settings, and therefore are no longer part of the Organization Settings:

- The OAuth authentication provider configuration and the SAML authentication configuration
- The Organization API Tokens have been moved to Api Token and Apps (since eSAW 20.42)

Organization Details

In the Organization Details section, basic configuration of the Organization is made:

- Set your company logo
- Organization Name
- CustomizationID (display-only; might be required for integrations with SSP API)
- Contact URL (can be inserted into notification templates - for more information please see Notification Template Settings)
- Support URL (can be inserted into notification templates - for more information please see Notification Template Settings)



Overview of the organization settings

Default Callback URL

In section “Default Callback URLs” you can define which URLs should be invoked as callback for envelopes sent via WebUI. When sending envelopes via API, the callback URL can be specified on envelope level via API.

Following callback URLs can be defined for envelopes sent via WebUI:

Callback type	Status Change
Callback for completed envelope	Gets fired whenever an envelope gets finished (completed or rejected)
Callback for envelope status change	Gets fired whenever an envelope's status value changes (workstepFinished, workstepRejected, workstepDelegated, workstepOpened, sendSignNotification, envelopeExpired, workstepDelegatedSenderActionRequired)

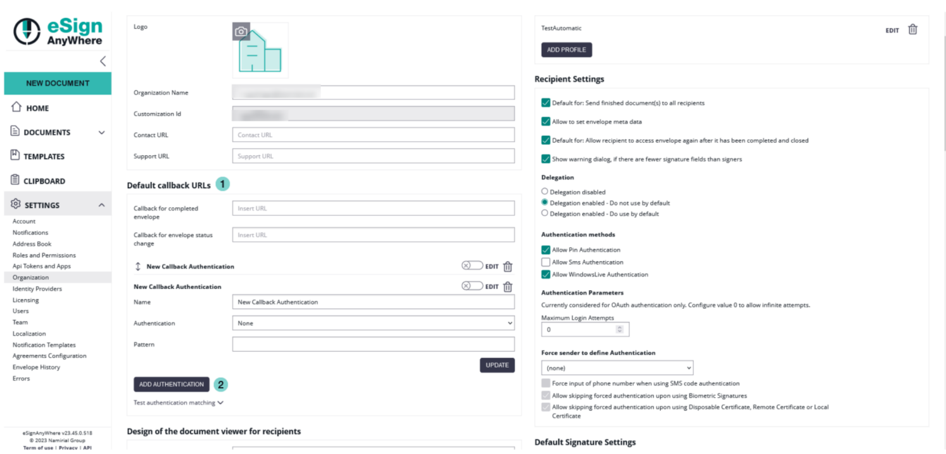
In both URLs, you can use following placeholders:

Placeholder	Value
##EnvelopeId##	the envelope id; typically in GUID format
##Action##	the action which triggered the callback; usually one of workstepFinished, workstepRejected, workstepDelegated, workstepOpened, sendSignNotification, envelopeExpired, workstepDelegatedSenderActionRequired. But consider in a callback handler implementation, that future versions may fire additional callbacks.

For envelopes sent via WebUI, it is currently not supported to specify a workstep event callback handler URL.
Read the Integration Guide, section Api Reference - Introduction REST#CallbackTypes, for further information about integrating with callback handlers.

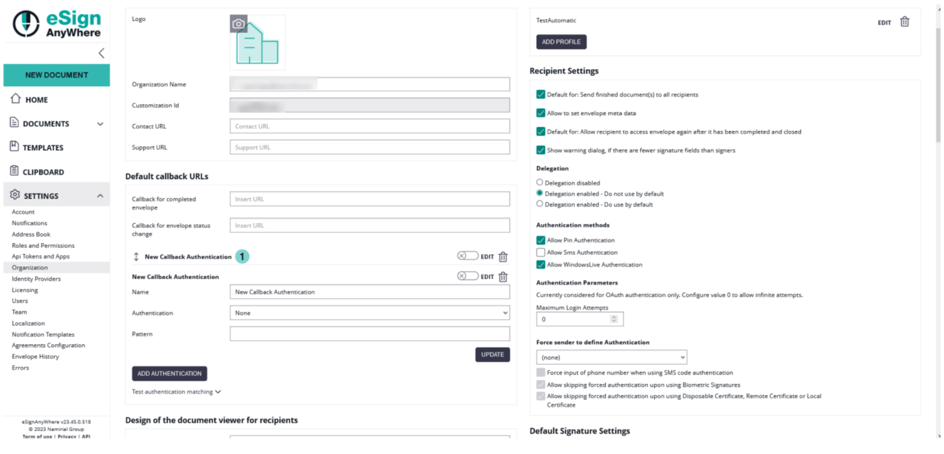
You can define an authentication for the callback. v 3.6

The next screenshot shows an overview where you can find the settings:

Figure	Description
	1. Default callback URLs settings 2. Add authentication

If you click on the button "add authentication" the following window appears:

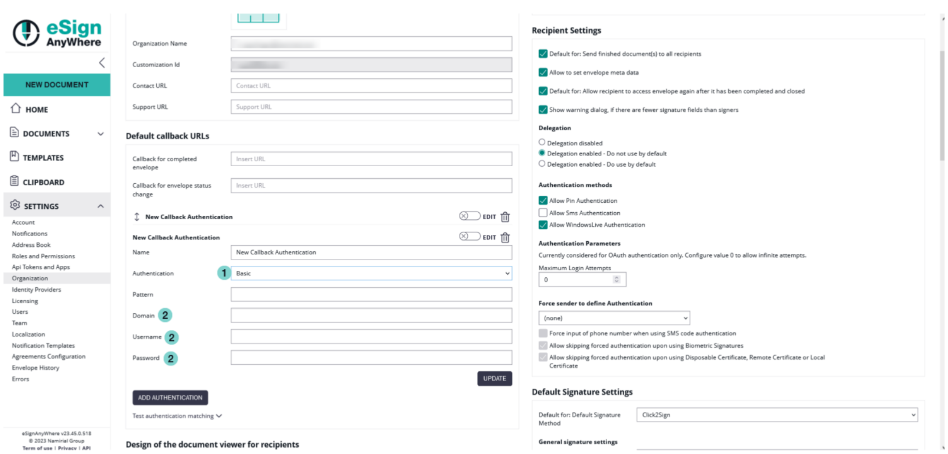
Figure	Description

	**1.** New callback authentication

In this section you can define:

- The name of the callback (default value: “New Callback Authentication”)
- The authentication (None or basic, default: none)
- The pattern (the URL should contain the given pattern)
    - The pattern “*” matches anything

If you choose “basic” as authentication the following window appears:

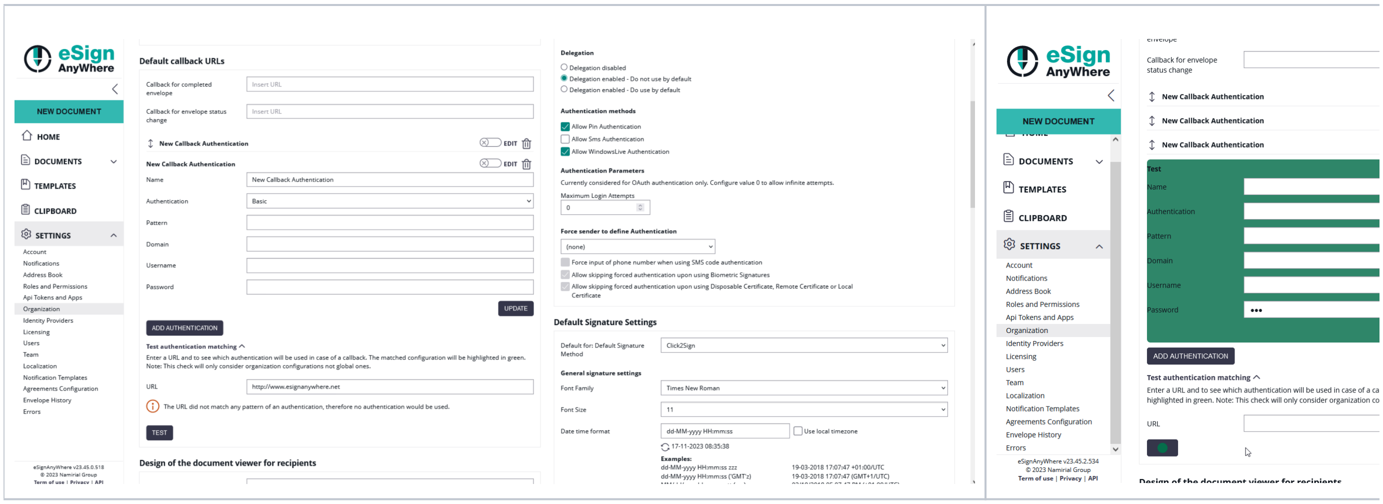
Figure	**Description**
	**1.** Select basic authentication **2.** Basic authentication settings

Within this section you can define:

- The domain
- The username
- The password

After filling in the dates for the authentication you can test if the URL matches any pattern of the authentications. If no pattern matches you get an information. The following screenshots show you a warning and a successful matching of the patterns.

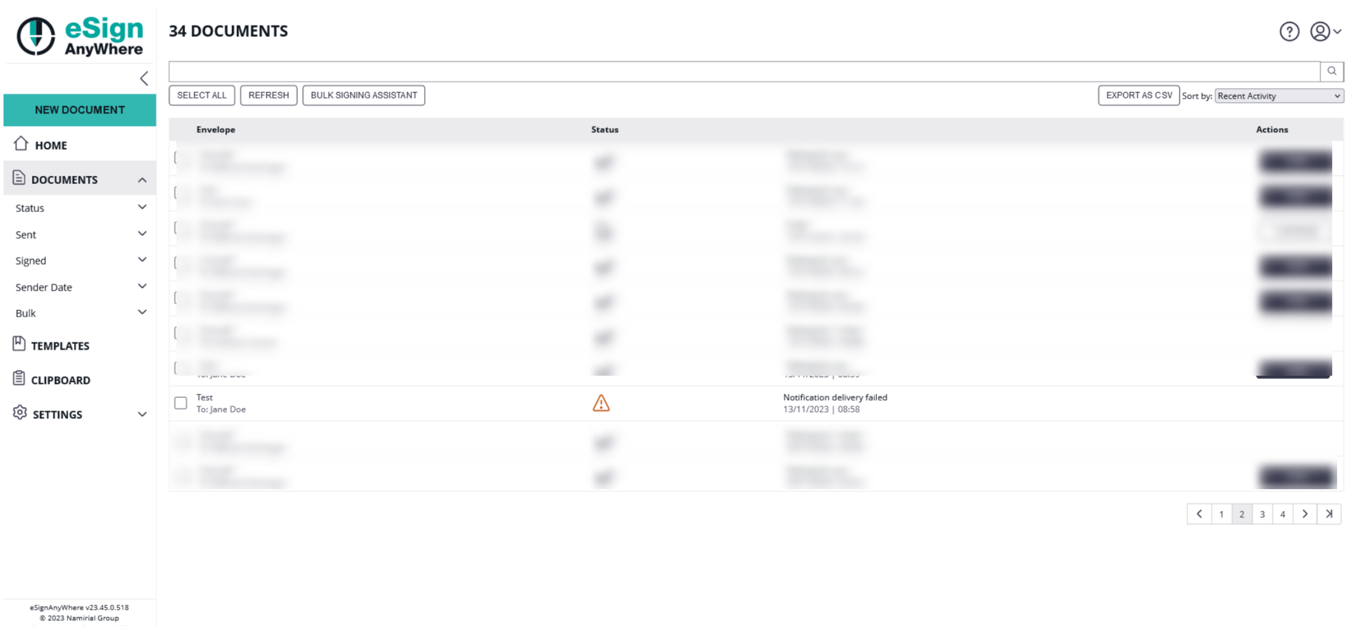
Warning	Matching pattern



If you have more than one authentication and you check the URL for the pattern and more than one authentication matches, always the first one of the list will be highlighted green.

After those settings you can send an envelope as usual. If you have authentication activated but the given dates are wrong you get an information.

In the next Screenshot you can see both scenarios (with a valid authentication and with a invalid authentication). If you click on the exclamation mark following text appears: “Response status code does not indicate success:401 (unauthorized)”.



Using the following two websites by your own risk. These two websites are not part of Namirial!

If you want to try the callback URL without authentication you can try it with: https://webhook.site

If you want to try the callback URL with authentication you can try it with:postman echo

Design of the document viewer for recipients

In this section you can define the redirect URL for finished documents. Moreover you can upload the current design, reset the design to default, download the current design and download the design template. For more information about designing the viewer please also have a look at the Viewer Guide.

Disposable Certificate

The Disposable Certificate section is visible only when all of the following preconditions are fulfilled:

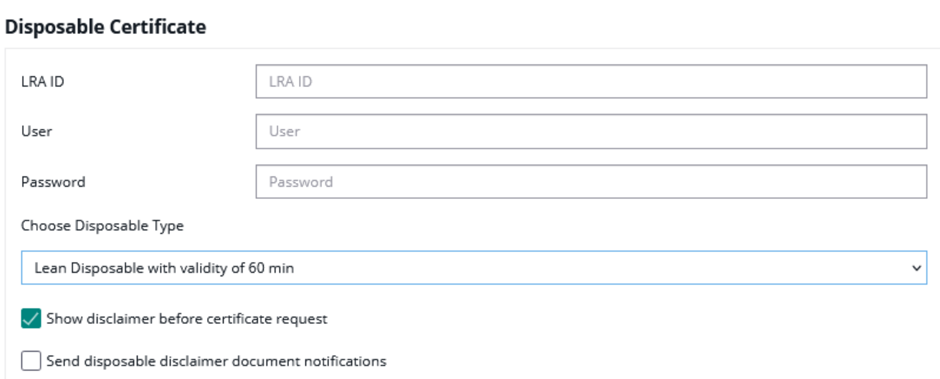
- Connection to the Trust Service Provider (Namirial TSP) is configured properly on the SIGNificant Server Platform configuration (WSC _global.xml)
- The feature flag "Disposable Certificate" is enabled for the organization
- The feature flag "UseCustomizationId" is enabled for the organization (and CustomizationService is running properly)

In addition, the Client Authentication TLS certificates need to be installed properly, and the service user must have permission to use their private key, to use Disposable Certificates and other trust services.

In this section of your organization you can define a disposable certificate. For this setting you need following dates:

- LRA ID
- User
- Password
- Choose a disposable type
  - Regular disposable
  - Lean disposable with validity of 60 min **(choose this type unless instructed different or stated different in contracts for the service)**
  - Lean disposable with validity of 30 days

Moreover, you can decide if you want to get a disclaimer before certificate request and if you want to send disposable disclaimer document emails. The following screenshot shows you where to find those settings.

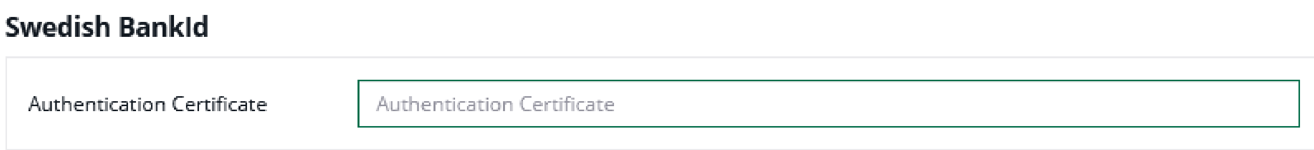
Figure	Description
	1. Disposable certificate settings

For more details and information of how to use the disposable certificate please also see the Envelope Structure.

BankId Authentication v 3.4

This feature is not available with basic subscription, so please contact your Namirial sales.

It is possible to set an AuthenticationCertificateThumbrint in the organization settings:



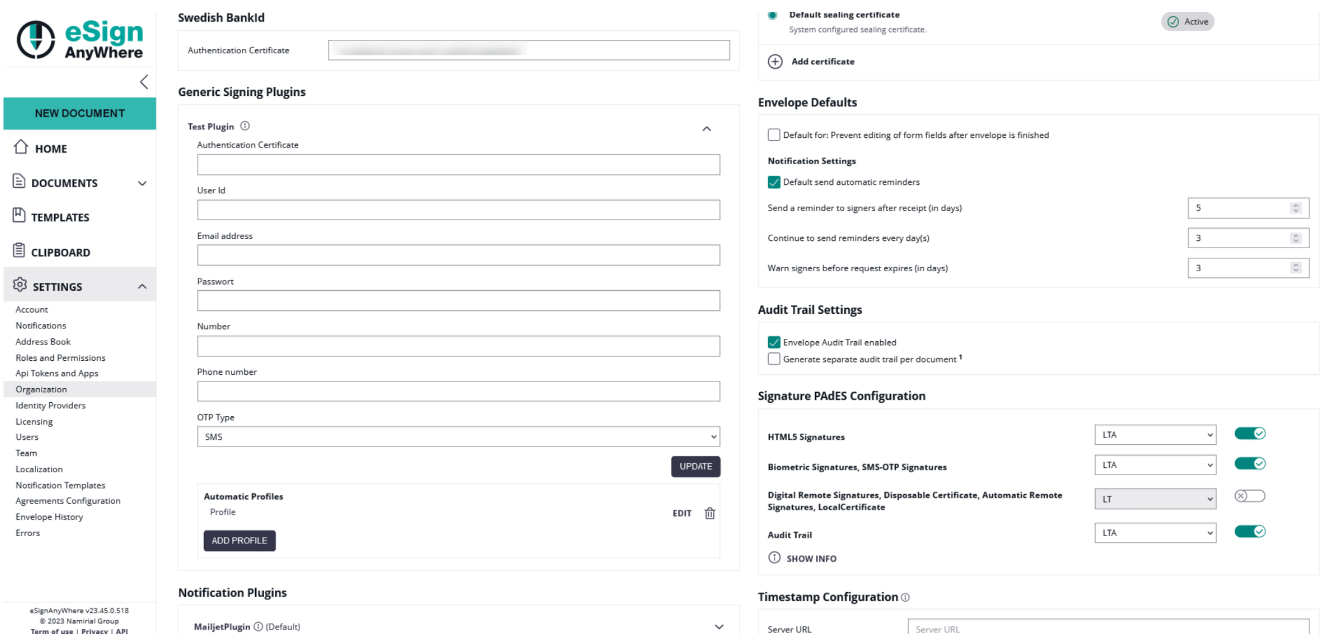
You can use different bankId AuthenticationCertificateThumbrints in different organizations.

You can find a sample configuration (REST and SOAP) on the following page: Envelope Structure

Generic Signing Plugin v 20.42

> This feature is not available with basic subscription, so please contact your Namirial sales.

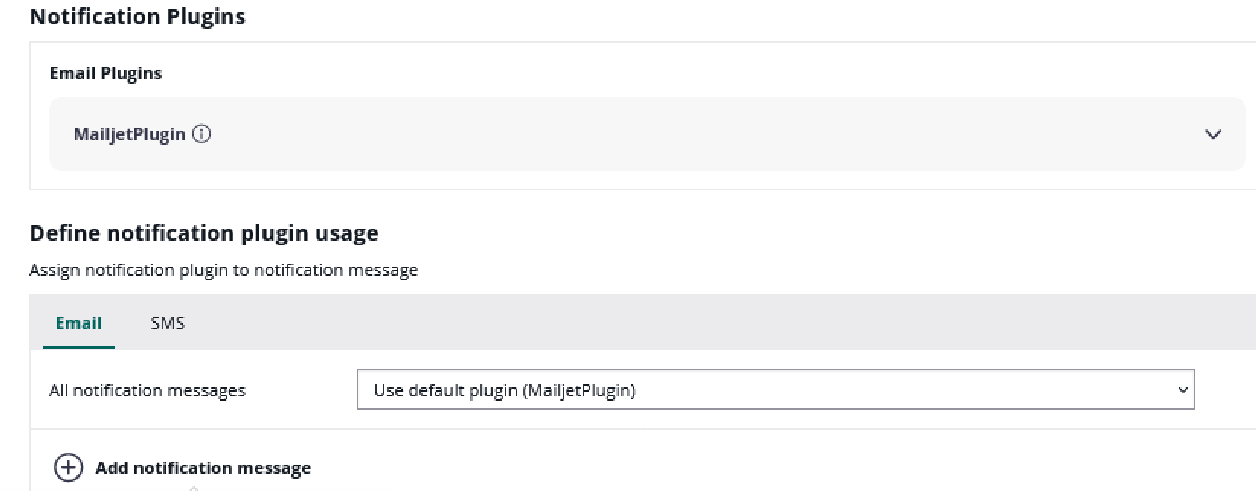
In your organization settings you can find the configuration for the generic signing plugin. Configure the plugin in this settings to use the signature in creating an envelope. Please see the next figure (sample of a plugin).



For more information about how to create an envelope with a generic signing plugin in the UI please also have a look at the Envelope Structure.

For information about how to send an envelope with a generic signing plugin in REST please see a sample configuration at the Envelope Structure.

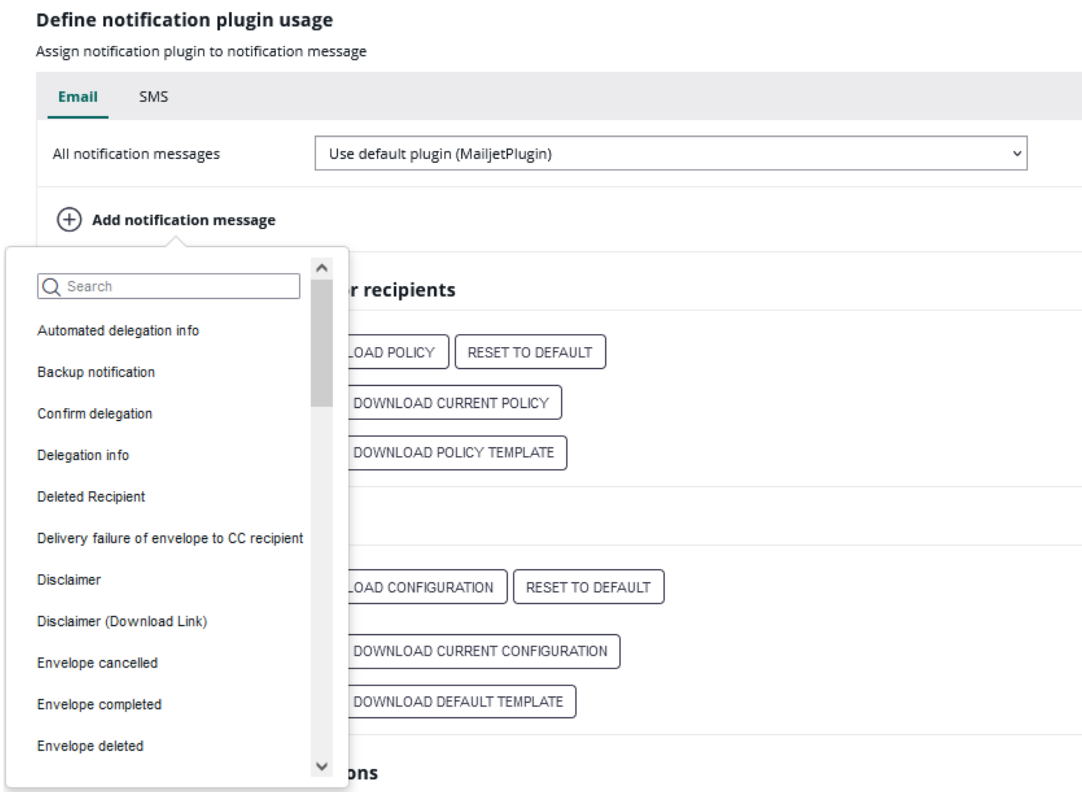
Notification Plugin



Selection of the notification type per organization:

- default notification type is always available
- enabled plugins (with a valid configuration) are shown

It is possible to assign plugins to notification messages individually by adding a notification message type. Please note that it is possible to switch between email and SMS notification plugin usage.



Policy for the document viewer for recipients

In this section you can:

- upload a policy
- reset the policies to default
- download the current policy
- and download the policy template

Please see the following sample of the policy template.

Policy Template

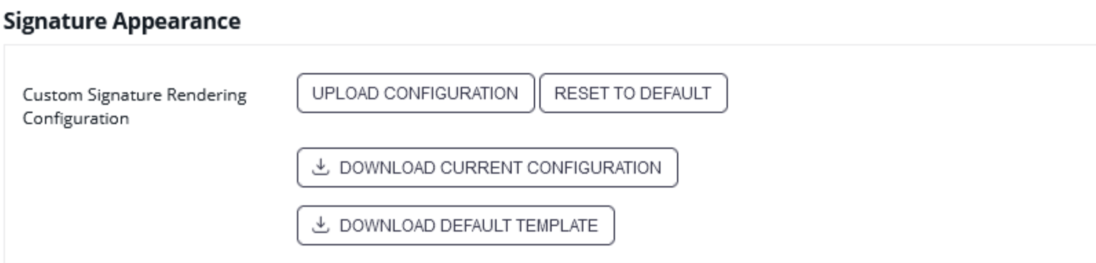
```
<GeneralPolicies>
  <AllowSaveDocument>1</AllowSaveDocument>
  <AllowSaveAuditTrail>1</AllowSaveAuditTrail>
  <AllowUndoLastAction>1</AllowUndoLastAction>
  <AllowAdhocPdfAttachments>0</AllowAdhocPdfAttachments>
</GeneralPolicies>
```

You can find an overview of all policies on this page: Document-Policy

Signature Appearance v 21.16

The signature appearance section allows to configure the representation of the signature (or seal) on the PDF document. With custom signature rendering layout configuration ("stamp imprint configuration"), an organization administrator can define how the stamp imprint on the signature image looks like (e.g. fonts, elements, layout etc). It can be used e.g. to set organization wide background images (e.g. company logos) or define specific fonts for text added to the stamp imprint. While it has no impact on the legal levels of signatures (in EU, defined by eIDAS), a customer specific stamp imprint representation can create higher subjective trust and contract awareness of your customers.

A detailed guide about changing the Signature Rendering Configuration is available in chapter "Stamp Imprint Configuration".



The Signature Appearance section is visible only when all of the following preconditions are fulfilled:

- The feature flag "UseCustomStampImprintConfiguration" is enabled for the organization

Activity-Engine Custom Localizations

This setting allows you to override localizations, enabling customization for various elements such as signature image rendering labels and text for transaction code configuration (e.g. SMS text). In this section you can

- upload a translation bundle,
- reset to default settings,
- download the current translation bundle,
- and also access the default template for localizations.

Use the template to customize any supported localizations of the SIGNificant Wokrstep Controller. Note the following procedure:

- Make a copy of the file
- Rename it to include the language code of the target language (e.g. Localizations.de.custom.json)
- Open the copied file
- Find the items that needs to be changed and adapt the values accordingly
- Remove all other items (which still have the default value) to receive updates automatically after a software update

Please see also Language Support for the available languages.

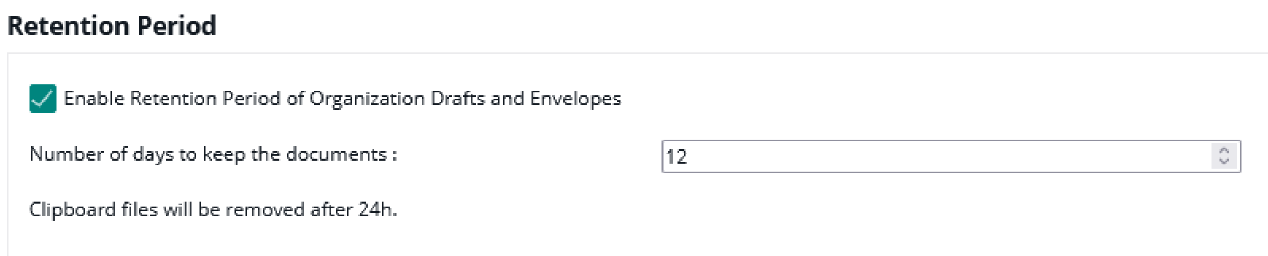
Retention Period

> Please note the following: The process starts with the next interval (interval time can be configured in the _global.xml). Depending on the configured interval it could take some time until the process starts. After the interval was reached the senders get a notification that the envelopes will be deleted soon. Immediately afterwards the envelopes will be deleted.
>
> Please also note that there is no limit (maximum number) for envelopes that will be deleted.

In this section you can define a retention period for the organization drafts and envelopes. Please note the following rules for the different types of documents (add the days you selected in this section to the following rules:

- Drafts will be removed X days after creation date
- completed/rejected and canceled envelopes will be removed X days after completed/rejected/canceled date
- expired envelopes will be removed X days after expiration date
- templates are not removed

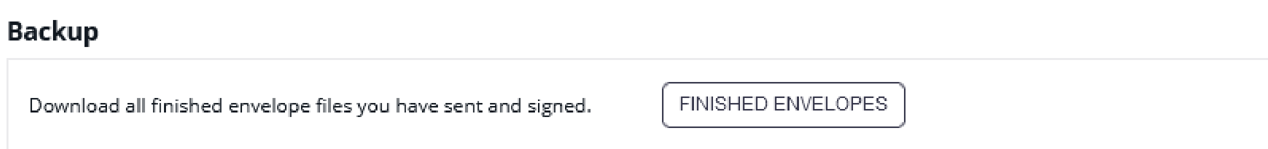
Please also see the next figure:



When enabling retention period, please ensure to set up an appropriate process to keep copies of signed documents, audit trail evidence and other legally binding documentats related to the envelope elsewhere. Data retention configuration will permanently delete the envelopes, including signed envelopes, from the eSignAnyWhere Platform according to the rules described above. We recommend to store the documents and related evidence in a DMS. When API access is granted for your account, you can implement automatic storage in a DMS after an envelope was completed. Alternatively you could e.g. keep copies in any other storage or probably keep a copy in your mail inbox.

Backup

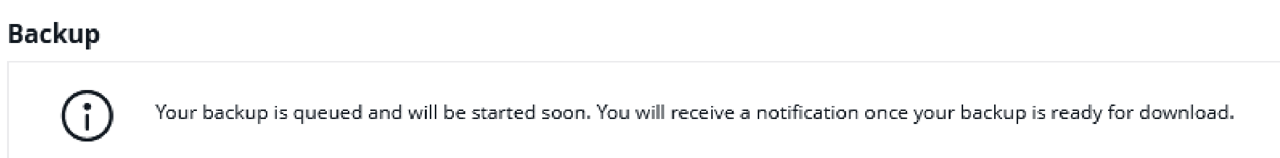
In this section you can download all finished envelopes you have signed or sent.



If you click on the “Finished Envelopes” button you can see that the backup is prepared.

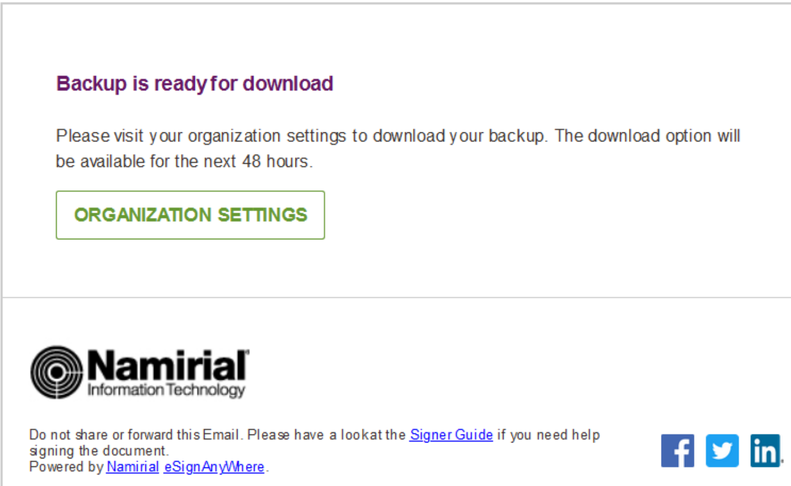
While collecting all envelopes on the server for the backup (which may take up to several hours), following Text will be displayed:

> *Your backup is queued and will be started soon. You will receive an email once your backup is ready for download.*



If you e.g. have been logged in in several browsers while requesting the backup, or request the backup at the same time as another user does, the text might not yet be visible while the backup process is already in progress. If you press the button to start a backup process, an error message informing that you "tried to schedule a backup operation while another one is already in progress" will be shown.

Once the backup was completed, you will receive an email to download the backup:



The backup will then available for 48 hours to be downloaded. The download option is presented only in the organization settings, which require user login of a user with some permissions to access the organization settings, to avoid unauthorized access to the backup.

Timestamp Configuration

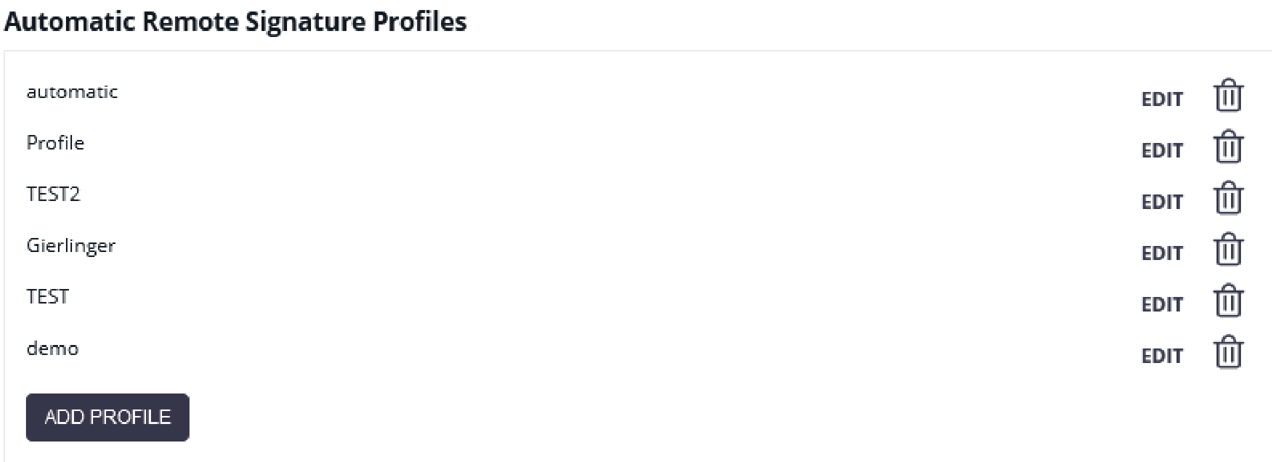
The timestamp configuration allows to set timestamp service on a per-organization basis.

Following configurations are available:

- Server URL
- User credentials
  - User
  - Password
- Hash Algorithm
  - Sha1, Sha256, Sha512

Automatic Remote Signature Profiles v 3.2

In this section the user manager of an organization can add automatic remote signature profiles, which can be used for any workflow as a recipient (recipient type "Automatic"). This recipient signs automatically the signatures and the workflow continues automatically. For more information please also have a look at the electronic signature guide.

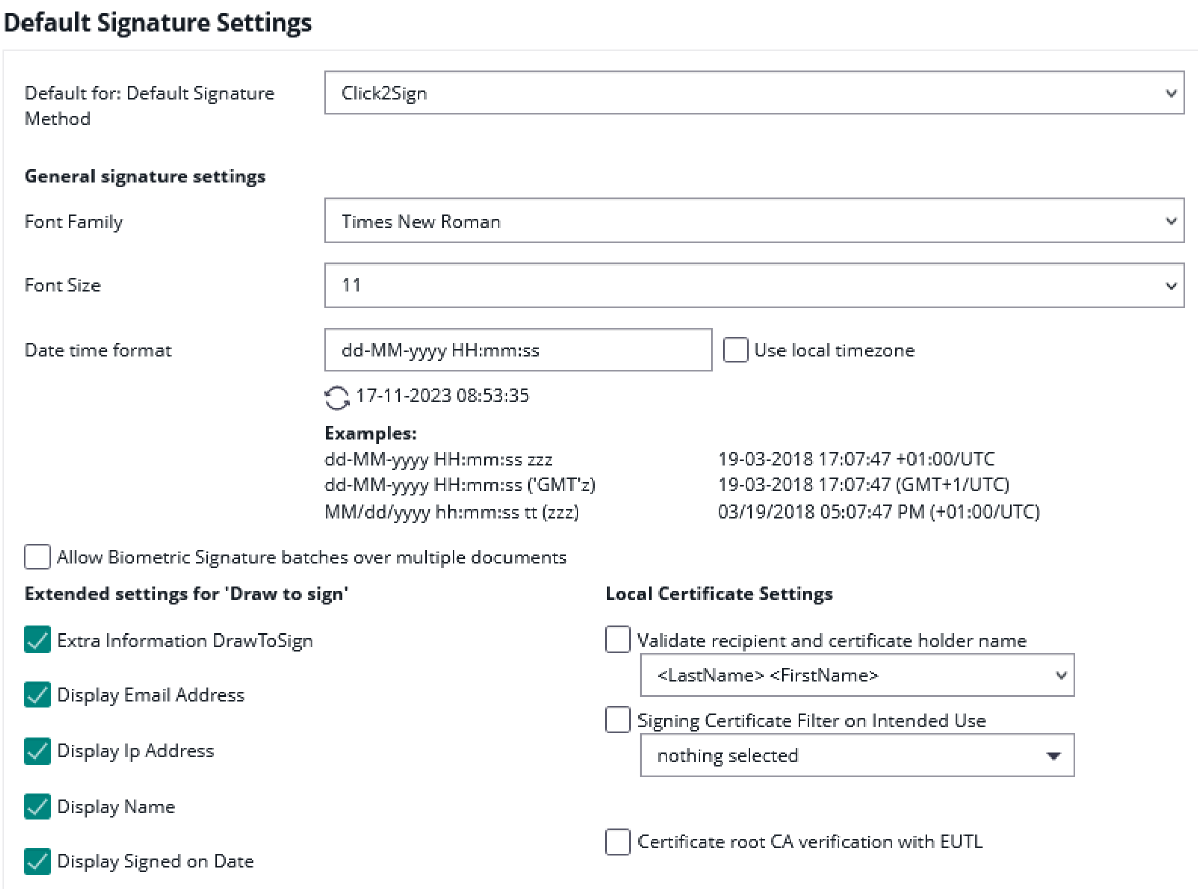


The Automatic Remote Signature Profiles section is visible only when all of the following preconditions are fulfilled:

- The remote signature endpoints are configured in the SSP configuration (SaaS: request the change at Namirial; On-Premise: see Namirial RemoteSignaturePlugin documentation; documentation accessible after login only)
- The feature flag "AutomaticRemoteSignature" is enabled for the organization

Default Signature Settings

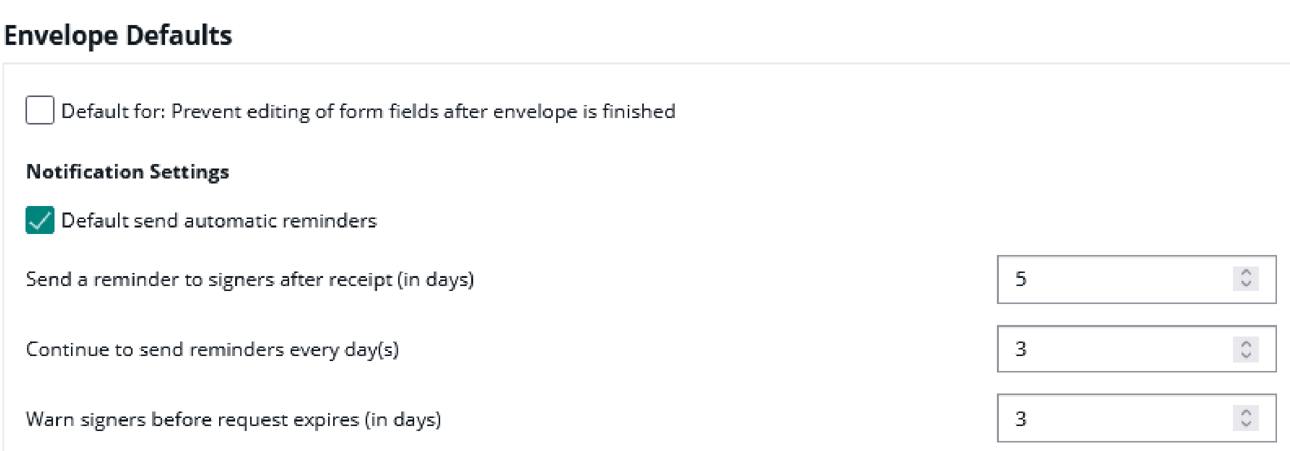
In this section you can set the default signature type for the envelopes. After you have set the configuration in this section the defined signature type will be preselected if you create a new envelope.



> ⓘ Note that settings which we name "default" or "default for ...", or combine in a grouping element with one of this terms, just define the "defaults" (i.e. the preselected configuration value) for drafts and envelopes. A user may change the value on a per-envelope level.
> Just in some cases, permission objects may disallow changing some values on a per-envelope level.

Envelope Defaults

The envelope defaults section allows to set "default" parameters for drafts and envelopes which are created. Settings take immediately effect for all drafts or envelopes created after changing the value. Already created drafts, envelopes or templates will not be updated.



> Note that settings which we name "default" or "default for ...", or combine in a grouping element with one of this terms, just define the "defaults" (i.e. the preselected configuration value) for drafts and envelopes. A user may change the value on a per-envelope level.
> Just in some cases, permission objects may disallow changing some values on a per-envelope level.

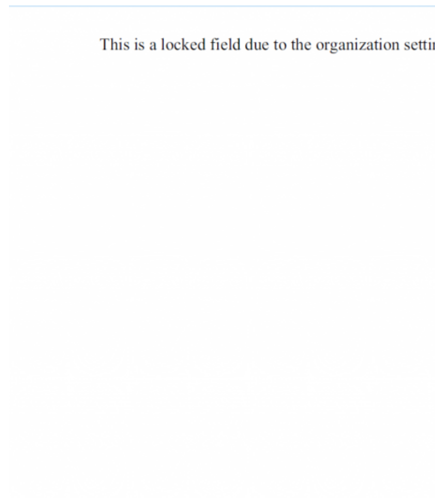
The section allows defining the following default values:

- Default value for preventing editing of form fields after envelope is finished
- Default values for the automatic reminders sent to a signer for an envelope until it is getting signed
  - Should reminders be set, in general?
  - In which interval should reminders be set? (See User Guide for more details about reminders)

If you prevent editing form fields after the envelope is finished the form fields in the PDF are all read only. **v 20.28**

Therefore, after locking the form fields (after the final workstep), the form fields are not editable any more with other PDF tools.

Please also see the next figures:

Standard (Not Locked)	Locked Form Field
	
The form field value remains editable in the PDF file even after completing the envelope processing, according to allowed modifications as of PAdES standard. The form field content contained at signing time or at envelope completion can be checked in the stored versions which are included in the PDF file.	The form field's final value at the end of envelope the PDF in a non-editable format. This prevents, t might try to argue with changes he did in his local

Information on whether the form fields are locked or not can also be found in the audit trail. Please see the next figure:

Sent Notifications

Name	*Action*	*Date*
	Request signing	2020-06-22 | 09:44:59
	All form fields have been locked	2020-06-22 | 09:45:08
	Envelope has been finished	2020-06-22 | 09:45:08
	Copy of finished document sent	2020-06-22 | 09:45:08

Audit log Settings

> ⓘ Note: It is not recommended to disable the audit-log, because it is an important evidence (see signature guide).

In this section you can define the following settings:

- Settings of the audit log (audit trail).
- Settings for separate logs per document

Signature PAdES Configuration v 3.7

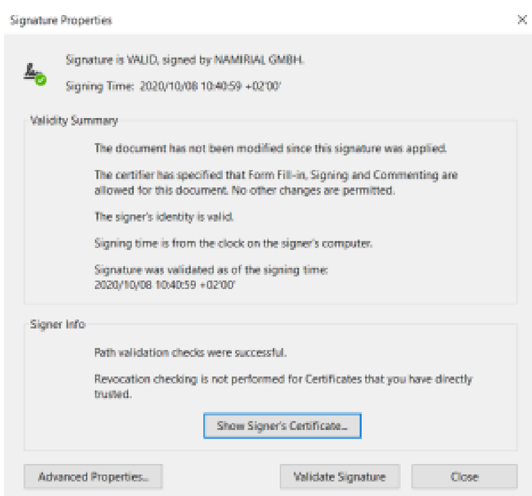
Allows to set the signature configuration based on the different PAdES levels, for following types of signatures.

- HTML5 Signatures (Click2Sign, Type2Sign, Draw2Sign)
- Biometric Signatures, SMS-OTP Signatures
- Digital Remote Signatures, Disposable Certificate, Automatic Remote Signatures, P7M-Signature, SwissCom, A-Trust, LongLiveDisposable, PushTan, LocalCertificate
- Timestamps in case they are independently added and not part of a signature

In case of having one signature field with multiple signature types allowed, the signature type is selected per signature field and not per signature method. Therefore, as soon as a signature field contains one of the signature methods listed above, its PAdES configuration is considered for all signature types. If different PAdES configurations would match, then the "highest value" PAdES configuration is considered, while the sort order from lowest to highest value is "HTML5 Signatures", "Biometric Signatures, SMS-OTP Signatures", "Digital Remote Signatures, Disposable Certificate, Automatic Remote Signatures, P7M-Signature, SwissCom, A-Trust, LongLiveDisposable, PushTan, LocalCertificate, GenericSigningPlugin"

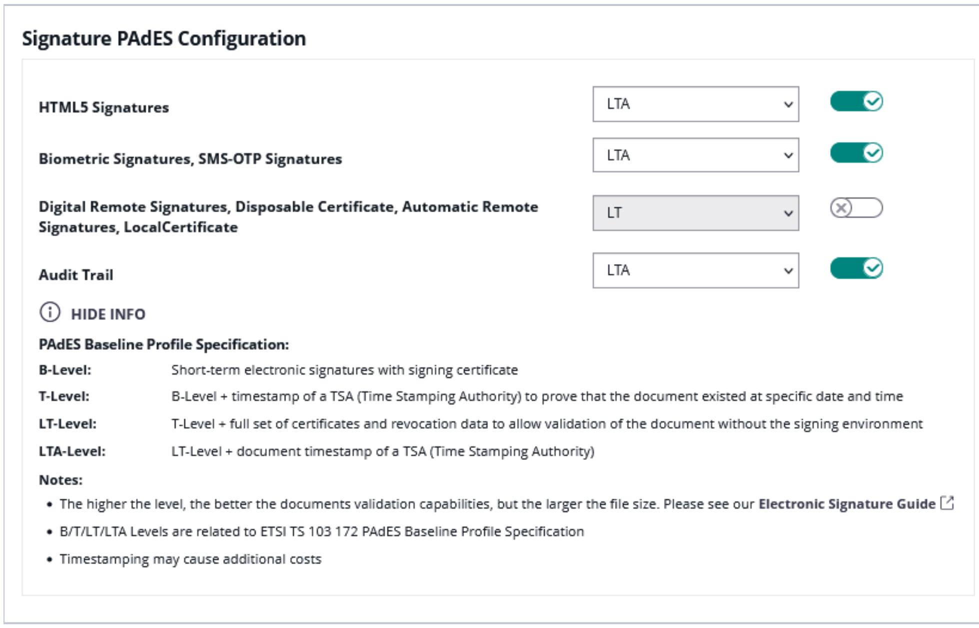
Description of the different PAdES baseline levels supported by eSignAnyWhere:

- PAdES level BASELINE-B without using an external timestamp server
  - B-Level: Short-term electronic signature with signing certificate
    - contains just the time information from local machine; without an external server time stamp



- PAdES level which require using an external timestamp server: BASELINE-T, BASELINE-LT and BASELINE-LTA
  - T-Level: Includes B-Level and a time stamp
    - Use the configured time stamp server on the signature itself
    - Ensures that the document existed at a specific date and time, where time is granted by the external timestamp server
  - LT-Level: Includes T-Level and a full set of certification and full set of revocation data
    - Use the configured time stamp server on the signature itself
    - Allows validation of the signature without access to the signing environment.
  - LTA-Level: Includes LT-Level and a timestamp of a TSA (Time Stamping Authority)
    - produces in addition to the signature field defined a time stamp signature on the document

Figure	Description

	1. PAdES settings

Email Settings

- Set the email sender appearance configuration

The dropdown list allows to select one of the 3 different appearances:

- Sender's "<given-name> <surname> via <product-name>"
- <organization name> via <product-name>
- <product-name>

The product-name is an instance wide configuration (Further reading in case authorized: GlobalXML#E-Mailconfiguration; value "emailSenderProductName")

If an e-mail is sent in a context that does not match the configured value (e.g. an org-specific reminder about license, but sender name is configured), those mails are automatically sent using the "next matching entry" from the list (in the example, it would use the organization-name configuration).

User Logout Redirect Url

- Set a redirect Url for eSignAnyWhere users, when they logout (e.g. to an intranet page)

Default redirect url before sending a draft

> **Feature Flag**
>
> This setting is available only when the feature flag "BeforeDraftSendRedirect" was granted to the organization.

Configures a Redirect URL to which the envelope creator is redirecting instead of sending an envelope. Following placeholders are available:

- ##EnvelopeId##
- ##SenderUserId##

- ##OrganizationId##

Instead of the page sequence

"Recipients Page" - "Designer Page" - "Summary Page"

, with a configured redirect url before sending, the sequence is following:

"Recipients Page" - "Designer Page" - "Summary Page" - (custom redirect page)

In this scenario, the custom redirect page may adopt the draft with the draft update API methods, and has to send the draft via API methods.
See Document Tagging Scenario - Example showing how to collect metadata for DMS archiving for an example on how to integrate a DMS tagging using that functionality.

Envelope Details Page

- Allows the sender to copy the viewer link from the envelope details page (if sender role grants required envelope permission)
- For more information please also see this page

Extended Signing Options

Since version 23.52

> Be careful when changing these settings, as they might have unwanted side effects. If "Allow signing of locked documents" is disabled, the user
>
> Per default, locked PDFs can not be signed!

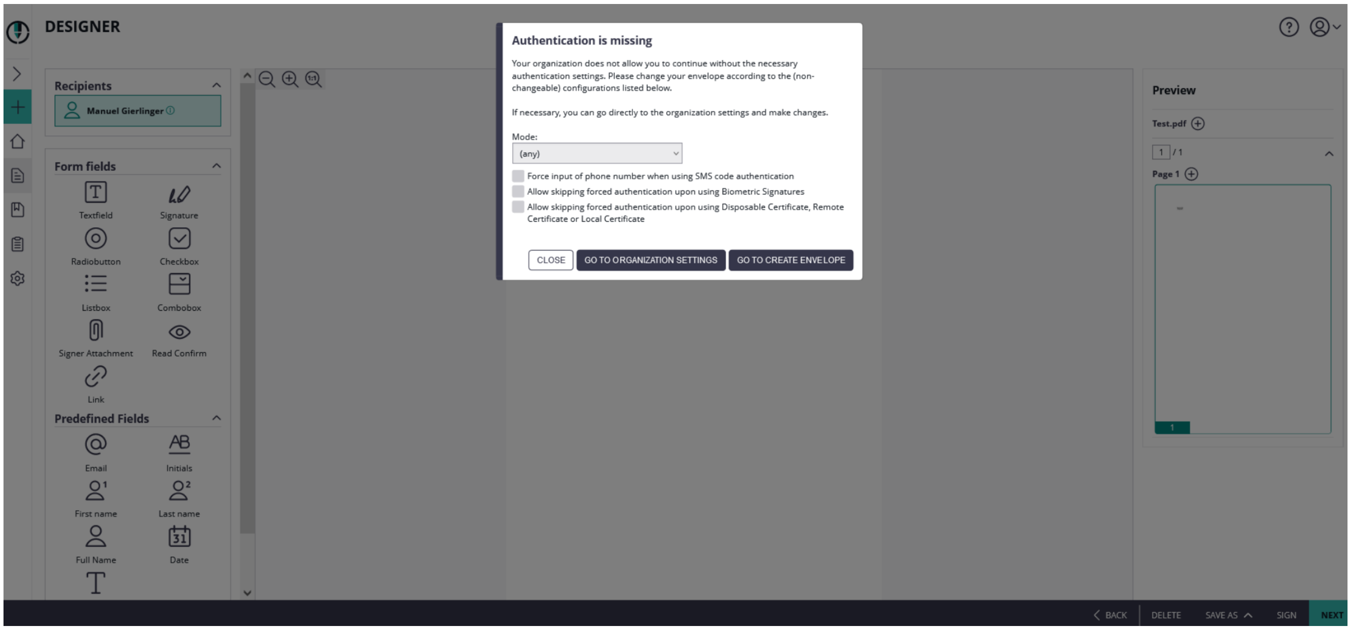
- Allow signing of locked documents

Recipient settings

You can set the following settings for the recipient:

- default CC for all signers
- usage of envelope metadata
- allow recipients to access envelope again after it has been completed and closed
- Show warning dialog, if there are fewer signature fields than signers
  - warning will be shown if:
    - only some of the signers have no signature field
    - when all of the signers have no signature field
- delegation settings
- allowed authentication methods for signers
- force authentication v 20.28

If you force an authentication and the user does not select any or a specific authentication method then the user will get the following notification:


DESIGNER
Recipients
Manuel Gierlinger
Form fields
Textfield
Signature
Radiobutton
Checkbox
Listbox
Combobox
Signer Attachment
Read Confirm
Link
Predefined Fields
Email
Initials
First name
Last name
Full Name
Date
Authentication is missing
Your organization does not allow you to continue without the necessary authentication settings. Please change your envelope according to the (non-changeable) configurations listed below.
If necessary, you can go directly to the organization settings and make changes.
Mode:
(any)
Force input of phone number when using SMS code authentication
Allow skipping forced authentication upon using Biometric Signatures
Allow skipping forced authentication upon using Disposable Certificate, Remote Certificate or Local Certificate
CLOSE
GO TO ORGANIZATION SETTINGS
GO TO CREATE ENVELOPE
Preview
Test.pdf
1 / 1
Page 1
BACK
DELETE
SAVE AS
SIGN
NEXT