

# CIRCULARO Super Administrator



# Agenda

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This training slides are intended for administrators of a multi-organization deployment. The following information is not intended for organization administrators.

This training covers:

1. Creating new organizations
2. Adding users and managing permissions
3. Organization and tenant settings overview



Most of the mentioned options will be available through the admin menu

The screenshot displays the Circularo web application interface. At the top, there is a dark blue header with the Circularo logo, a search bar for documents, a notification bell with 3 alerts, and a user profile for 'Administrator admin@circuloro.com'. On the left, a sidebar contains navigation options: Home, Documents (48), Templates, Drafts (19), My folders, Shared folders, Starred, Recent, Shared, Trash, and Reports. The main content area features a 'SIGN NOW' button, a user profile card for the Administrator, and a dropdown menu with options: Preferences, Help Center, Get Support, and Administration (highlighted with a red box), and a Log out button. Below this is an 'Overview' section with four cards: Inbox (0), Waiting for others (31), Completed (53), and Approaching deadline (0). The footer shows 'Circularo ©2025' and a help icon.

## Note

- To see these options, your accounts needs to have the super administrator permissions and not be a part of any organization

# Creating an organization



## In App interface

The screenshot shows the Circularo app interface. The top navigation bar is purple with the Circularo logo on the left and a user profile dropdown on the right. The main content area is titled 'Organizations' and contains a table with columns for 'ORGANIZATION NAME', 'TRANSACTIONS', 'MEMBERS', and 'PLAN STATE'. A red box highlights the 'Add new organization' button in the top left corner of the main content area. A dialog box is overlaid on top of the main content area, showing the 'User Information' form. The dialog box has a title bar with 'User Information' and 'Personal Details' tabs. The form contains the following fields:

- Email:** admin@acme.com
- Name:** ACME admin
- Account status:** Invited
- Created on behalf of:** Administrator

At the bottom of the dialog box, there are 'Cancel' and 'Save' buttons.

## Steps

- Navigate into **Users & Access** -> **Organizations**
- Click on **Add new organization**
- A dialog will appear, which will prompt you to create new user
- This user will be the new organization admin for the new organization

# Creating an organization



## In App interface

The screenshot shows the Circularo app interface with a modal form for creating an organization. The modal has a dark blue header with the 'circularo' logo and a user profile 'Administrator admin@circularo.com'. The form is titled 'Group information' and has tabs for 'Members(1)', 'ACLs', and 'Plan'. The form fields are:

- Organization name:** A text input field containing 'Organization ACME admin'.
- No translations:** A text input field with an 'Add' button.
- Description:** A large text area.
- Organization:** A dropdown menu with 'Organization ACME admin' selected.
- Plan:** A dropdown menu with 'pro' selected.

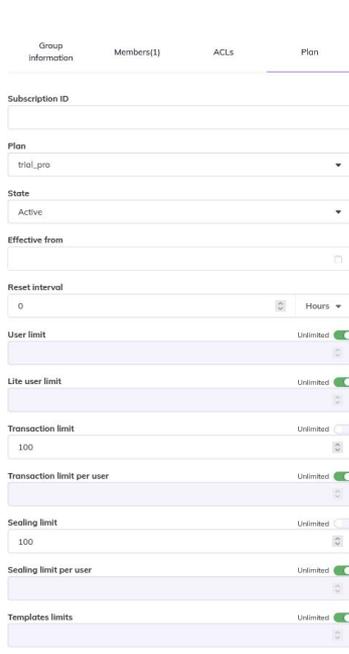
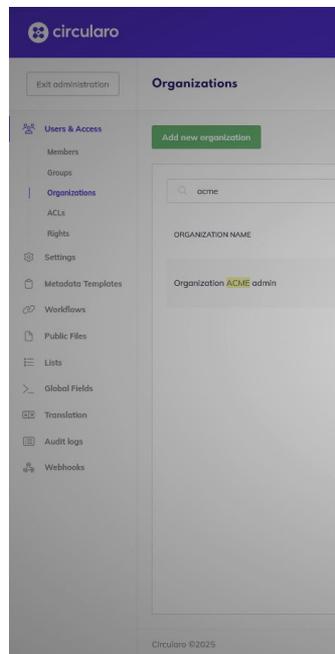
At the bottom of the modal are 'Cancel' and 'Save' buttons. The background shows the 'Users & Access' sidebar and a list of organizations.

## Steps

- Once invited, the system will automatically create a new organization using the **user's name**
- Rename the organization from "Organization <user>" to the desired name
- Select the correct **Plan** based on organization's subscription



## In App interface

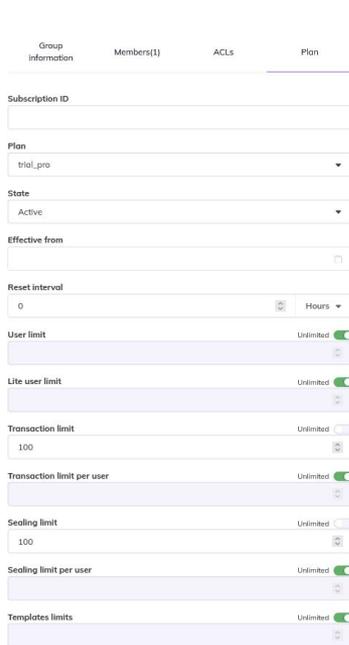
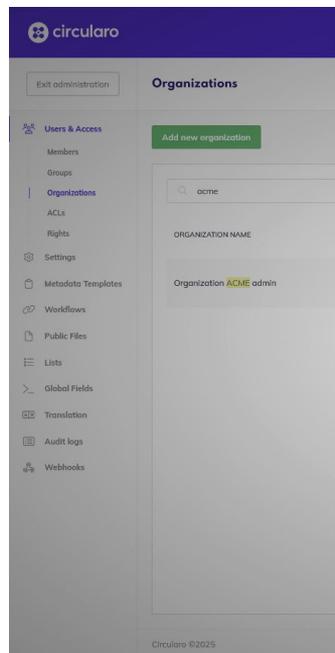


## Steps

- Navigate into tab “plan”. Set the following parameters:
- **License name:** Choose based on the client's subscription
- **Subscription ID:** Unique identifier
- **State:** Leave as Active
- **Effective from:** The date the subscription begins - typically the day the admin receives access to application
- **Reset interval:** Usually set to **1 year**, unless otherwise specified



## In App interface



## Notes

- Assign the following limits based on the organization subscription:
  - User limit
  - Lite user limit
  - Transaction limit
  - Transaction limit per user
  - Sealing limit
  - Sealing limit per user
  - Storage capacity limit
  - Storage capacity limit per user



## In App interface

The screenshot shows the Circularo user management interface. A modal window for creating a new user is open, with the following fields and options:

- User Information** (selected tab)
- Personal Details**
- Group memberships**
- Email**: acme2@test.com
- Name**: ACME user 2
- Account status**: Invited
- Created on behalf of**: Administrator
- Organization**: ACME (highlighted with a red box)
- Role**: Member (highlighted with a red box)
- Buttons**: Cancel, Save

## Steps

- The new organization admins **can invite members** into their organization themselves
- You can also register new users by **selecting the proper organization**
- Make sure to select the **proper role** for the new user (Member, Lite member, Admin...)



## In App interface

**CSV Import**

Organization  
ACME

Groups

Show advanced parsing options

**Preview**

| MAIL       | NAME   | COMPANY | JOB_TITLE | PHONE | LANGUAGE | TIMEZONE |
|------------|--------|---------|-----------|-------|----------|----------|
| acme2@L... | ACME 2 | ACME    |           |       |          |          |
| acme3@L... | ACME 3 | ACME    |           |       |          |          |

**Mapping**

| Mapped fields |             | Unmapped fields |
|---------------|-------------|-----------------|
| Mail *        | Mail x      | Mail            |
| Name *        | Name x      | Name            |
| Company       | Company x   | Company         |
| Job title     | Job_title x | Job_title       |
| Phone         | Drop fields | Phone           |
| Language      | Language x  | Language        |
| Timezone      | Timezone x  | Timezone        |

To perform field mapping, simply drag matching fields from the right column to the left column.

## Steps

- Multiple users can be imported by selecting the **Import** option and uploading a CSV
- Make sure to **select the correct organization** to import into
- When using non-standard CSV formats, you can also perform field mapping



## In App interface

The screenshot shows the Circularo administration interface. At the top, there is a blue header with the Circularo logo, a notification bell with 3 alerts, and a user profile for 'Administrator admin@circularo.com'. Below the header, there is a navigation sidebar on the left with the following items: Users & Access, Members, Groups, Organizations, ACLs, Rights, Settings (highlighted with a red box), Metadata Templates, Workflows, Public Files, Lists, Global Fields, Translation, and Audit Log. The main content area is titled 'Members' and displays a summary of member statistics: MEMBERS TOTAL 190, ACTIVE 145, and SUSPENDED 1. Below the summary, there are filters for 'Filter by status', 'Organizations', and 'Teams', along with a search bar and a table of members. The table has columns for NAME, EMAIL, ACCOUNT STA., LAST SEEN, REGISTER..., and ACTIVE SESSI... The table contains three rows of member data.

| NAME   | EMAIL           | ACCOUNT STA. | LAST SEEN      | REGISTER... | ACTIVE SESSI... |
|--------|-----------------|--------------|----------------|-------------|-----------------|
| ACME 2 | acme2@test.c... | Invited      | 21 minutes ago | 23.4.2025   | 1               |
| ACME 3 | acme3@test.c... | Invited      | 21 minutes ago | 23.4.2025   | 1               |
| ACME n | admin@acme      | Invited      | 40 minutes ago | 23.4.2025   | 1               |

## Notes

- Settings can be applied on 2 levels:
  - Organization wide
  - Application wide
- Organization specific settings overwrite application wide settings
- Access application wide settings from the administration menu



## In App interface

Exit administration

### Organizations

Add new organization

Showing 1 - 3 of 73 items

Search for groups

| ORGANIZATION NAME | TRANSACTIONS | MEMBERS   | PLAN STATE |   |
|-------------------|--------------|-----------|------------|---|
| ACME              | 0 from 100   | Unlimited | Active     | <div style="border: 2px solid red; padding: 2px;">Edit</div> <div>Delete team</div> |
| ADXDev            | 0 from 100   | Unlimited | Active     |   |
| ΔGRF              | 0 from 100   | Unlimited | Active     |   |

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## Notes

- Organization specific settings can be accessed by selecting the **Edit** option from the organization list
- Some basic organization settings are available to the organization administrators as well
- Important settings are highlighted in the below tables, critical settings are highlighted in red

# General Settings



You can find the most important settings here

| Setting  | Description   | Default Value   |
|--|---|---|
| Application name                               | How should the application be named in the web interface and notifications?   | Circularo   |
| Application URL                                | URL on which the application is running   | <a href="http://circularo.com">http://circularo.com</a> |
| Alternative URLs                               | Alternative URLs on which the application is accessible. Useful for multitenant deployments, temporary DNS, and redirects | None specified  |
| Ticketing address                              | Email address where support requests are sent when the "Get Support" button is used                                       | some@email.cc   |
| FAQ URL  | URL of an external FAQ page. Leave empty if no external FAQ is used   | Empty   |
| Enable Microsoft Office Online                 | Enables Microsoft Office Online for Office document preview and editing   | Yes   |
| File dropzone max size                         | Maximum size of files (in MB) that can be uploaded via dropzones  | 40 MB   |
| Automatic organization sharing in shared files | Determines if newly added items in the root of shared files are automatically shared with the entire organization         | Yes   |
| Hide IP and location                           | Hides IP and location details for all user actions  | No  |
| Workflow fields in export                      | Adds workflow fields to CSV exports   | No  |
| Use PDF/A                                      | Should file be converted to PDF/A on upload? (may visually affect file)   | No  |
| SMS  | Enable/disable SMS sending. If enabled Twilio SMS service account details can be provided                                 | No  |

# General Settings - Language & Region



These are the default values that each user can change in their account preferences

| Setting                 | Description                                | Default Value |
|-------------------------|--|---------------|
| Default system language | Language set as the default for new users  | English       |
| Date format             | Preferred date format for the system       | dd/MM/yyyy    |
| Time format             | Preferred time format for the system       | h:mm a        |
| Timezone                | Preferred timezone for the system          | UTC           |
| First day of week       | Preferred first day of week for the system | Monday        |



These are generic settings which affect UI behaviour

| Setting                       | Description  | Default Value  |
|-------------------------------|--|--|
| Aside details full edit       | Show edit button at the top of aside detail  | On   |
| Default zoom level            | Default zoom level for document preview. Options: Automatic, Fit page, Fit width, Fit height, Show actual size | Automatic  |
| Telephone                     | Telephone input configuration. Specifies initial country and preferred countries (Alpha-2 codes)               | { "initialCountry": "cz", "preferredCountries": ["sa", "us", "gb", "tr", "cz", "de", "es", "fr", "jp", "ru", "cn"] } |
| Inbox post action             | Action after executing inbox actions. Options: close, next, noop (do nothing)                                  | noop   |
| Instant preview               | Opens document preview after a single click  | Yes  |
| Print resolution              | PDF print resolution (dpi)   | 150  |
| Send metadata in share        | Determines if metadata is included in share notifications  | No   |
| Disabled template definitions | Specifies disallowed e-signing templates   | Empty  |
| Allowed cloud providers       | Cloud services members can connect accounts to   | Google Drive, OneDrive, Dropbox, SharePoint  |
| Uneditable user details       | Prevents members from editing certain profile details (Phone, Name, Email, Company, Job title, Photo)          | All disabled   |

# UI Customization - Contents



These settings allow reconfiguration of parts of the UI - columns in tables, contents of properties, tabs and more

| Setting                               | Description   | Default Value  |
|---------------------------------------|---|--|
| Category table setup                  | Configure columns for specific categories   | JSON structure   |
| Table configuration settings (system) | System wide table configurations and presets  | JSON structure (Empty)   |
| Table configuration settings (user)   | User-specific table configurations and presets. These settings are part of the user's configuration and should only be modified when absolutely necessary | JSON structure (Empty)   |
| Quick filters (system)                | System wide quick filter preset configuration.  | JSON structure (Empty)   |
| Quick filters (user)                  | User specific quick filter preset configuration   | JSON structure (Empty)   |
| Aside details                         | Configure order of document details in the aside menu   | file-type,creates,shared-sign-state, shared-sign-expiration, signed, last-modified, tags,document-category,location, deleted |
| Public aside detail                   | Configure order of document details in the public(shared) aside menu  | file-type,assigned-by,shared-sign-state,shared-sign-expiration   |
| Aside details custom fields           | Custom fields in aside details should be always open  | Yes  |
| Advanced search                       | Advanced search configuration   | JSON structure   |
| Audit trail details                   | Setup audit trail detail items  | createDate, documentTitle, fileSize, format, pagesCount, sharedSignState, timezone, verificationLink                         |
| Intros                                | Step-by-step guide and feature introduction   | JSON structure   |

# UI Customization - Compose



These settings modify the behaviour of the file upload dialog for creating new documents

| Setting                                     | Description  | Default Value          |
|---|--|------------------------|
| New document from edoc template - grid view | Enables grid view selection when multiple templates are available            | Off                    |
| Fast compose                                | Opens file upload dialog directly for file templates                         | On                     |
| Compose hub                                 | Replaces type/template popup selection with a complex modal                  | On                     |
| Compose clone                               | Uses the compose view when cloning a document                                | Off                    |
| Document categories                         | Setup available document categories. Can be used for document classification | Contract, NDA, Invoice |

# UI Customization - Navigation



These settings modify the contents of menus and available options in them

| Setting           | Description  | Default Value  |
|-------------------|--|--|
| Navigation order  | Sidebar navigation items and their order   | landing_page, @all_documents, custom_templates, drafts, /, my_files_plain, shared_files_plain, /, starred, @recent, @my_shares, trash, /, statistics, contacts |
| Navigation groups | Setup navigation groups and their tabs   | JSON structure   |
| Fixed filters     | Configuration of the navigation menu contents  | JSON structure   |
| Default states    | Defines default navigation states after actions (login, signing, sharing, rejecting) | JSON structure   |



This section allows for complete re-configuration of the landing (home) page as well as modifications to the reports page

| Setting                      | Description  | Default Value   |
|------------------------------|--|---|
| Landing page setup           | Configure widgets and their positioning on landing page. | JSON structure  |
| Allowed statistic groups     | List of enabled reports                                  | transaction_consumption<br>transaction_overview<br>transaction_success<br>transaction_details<br>pending_documents  |
| Statistic groups definitions | Sets up reports with charts                              | JSON structure  |
| Charts default options       | Default look and feel for charts                         | JSON structure  |
| Allowed charts               | List of enabled charts for reports                       | trans_status<br>trans_success_per_date<br>trans_per_date<br>docs_per_user<br>trans_consumption<br>trans_per_user<br>docs_consumption<br>docs_per_state<br>trans_per_avg |
| Chart definitions            | Data definitions of all available charts                 | JSON structure  |
| Query definitions            | Manage queries used by document reports & charts         | JSON structure  |

# Signature



These settings include anything related to signing

| Setting                     | Description   | Default Value   |
|-----------------------------|---|---|
| Composite signature         | Enable composite signature (only last signer is visible in the document certificate)                | On  |
| Wacom drivers               | Checks for Wacom drivers during signing; prompts installation if not found                          | Off   |
| Signature envelope          | Selects image backdrop for signature decoration (empty = signature ID included, no_envelope, frame) | empty   |
| Certificate id              | Specifies the certificate name for document signing   | default   |
| LTV Signature               | Embeds LTV (long-time validation) signatures for future validation after certificate expiration.    | On  |
| Automatic reminders         | Sends automatic reminders to recipients.  | On (First reminder after: 3 days, Remind every: 3 days) |
| Allow drawing               | Allows free-drawn annotations on documents.   | Yes   |
| Share after completion      | Allows documents to be re-signed after completion (removes previous signatures)                     | On  |
| Skip signing type selection | Skips the signing type selection screen and goes directly to signing workflow definition            | Off   |
| DocID included              | Embeds document ID into the document (none, prefilled, required)                                    | none  |

# Signature 2



| Setting                                     | Description   | Default Value   |
|---|---|---|
| Type of trusted timestamping                | Uses TSA (Trusted timestamping) during signing  | None  |
| QR code redirects to                        | Specifies QR code link destination (Document detail, Verification page).                      | Verification page   |
| Annotation defaults                         | Default sizes/configurations for signatures, annotations, drawings                            | JSON structure  |
| Embed link                                  | Embeds document ID link into the signed document for traceability                             | On  |
| Where should the embedded link redirect to? | Destination for embedded link   | Verification page   |
| Signing order                               | Enables sequential signing order by default   | No  |
| Changeable signing order                    | Allows users to change signing order if default is set.                                       | Yes   |
| Signature provider                          | Specifies custom signature provider (Circularo, UAE PASS)                                     | Circularo   |
| Allowed signature providers                 | Defines available signature providers for users (internal, uaePassSign, uaePassQualifiedSign) | internal  |
| Detect signature fields                     | Detects signature fields in Word documents and PDFs   | Yes   |
| Default recipient rights                    | Sets default recipient permissions  | Download/Print: Yes, Delegation: Yes, Annotations on reject: No |

# Signature 3



| Setting  | Description   | Default Value                |
|--|---|------------------------------|
| Process prepare types                            | Allowed types in process creation   | SIGN NOW, WE SIGN, THEY SIGN |
| Default deadline                                 | Sets default processing deadline for documents  | None                         |
| Deadline changeable                              | Allows users to modify the default deadline if set  | Yes                          |
| All recipients in a group have to sign           | Determines if all group members must sign by default  | No                           |
| Recipients can repeat in the signing process     | A single recipient can repeat in multiple steps of the signing process. This applies to a sequential signing process only | No                           |
| Allow comments on finished document transactions | Enable this option to allow users to comment on finished document transactions  | Yes                          |
| Allowed types of signatures                      | Signature methods allowed: Drawn, Typed, Uploaded, Wacom, Mobile capture  | All methods enabled          |
| Enable recipient editing                         | Enable users to edit recipients of a document already sent to recipients  | No                           |



Most important settings related to user registration and login options

| Setting               | Description  | Default Value |
|-----------------------|--|---------------|
| Enable registration   | Allows new users to register into the system.                                | Off           |
| Hide registration     | Hides registration in the app but allows it via API or other methods.        | Off           |
| Enable usernames      | Uses usernames instead of emails as primary account identifiers.             | Off           |
| Welcome document      | Generates a welcome document for newly created users.                        | On            |
| Welcome document file | Specifies the file to use as the welcome document.                           | Not set       |
| Custom user fields    | Defines field names listed in every user's custom fields section.            | None          |
| New user folders      | Folder names automatically created for each new user.                        | Empty         |
| OAuth auto login      | Automatically uses the selected OAuth login method without user interaction. | Not set       |

# Registration - Terms and Conditions



Settings related to acceptance of legal documents

| Setting              | Description   | Default Value   |
|----------------------|---|---|
| Announce date (T&C)  | Announcement date for changes in Terms & Conditions | Not set   |
| Effective date (T&C) | Effective date for the Terms & Conditions           | Not set   |
| T&C link             | URL link for Terms & Conditions                     | <a href="https://www.circularo.com/terms/">https://www.circularo.com/terms/</a>                 |
| Privacy policy link  | URL link for Privacy Policy                         | <a href="https://www.circularo.com/terms/privacy/">https://www.circularo.com/terms/privacy/</a> |

# Registration - Password, LDAP



Security configuration for passwords, LDAP sync. parameters

| Setting                            | Description   | Default Value |
|------------------------------------|---|---------------|
| Hide email + password login option | Hides Username/Password login, allowing only 3rd-party logins                                       | Off           |
| Max failed authentication attempts | Maximum login attempts before account lockout   | 5             |
| Lockout in seconds                 | Duration (in seconds) of account lockout after failed attempts                                      | 300           |
| Enforce MFA                        | Requires all members to set up 2-Factor Authentication (MFA)  | Off           |
| Enable password expiration         | Forces users to change passwords regularly when enabled   | Off           |
| LDAP enabled                       | Enables LDAP synchronization  | Off           |
| Allow LDAP login                   | Allows users to log in using LDAP credentials (visible only when LDAP is enabled)                   | Off           |
| LDAP Parameters                    | Configuration for LDAP server (URL, Search Base, Search Filter, Base DN, Bind DN, Bind credentials) | Not set       |
| LDAP Mapping                       | Maps LDAP fields to user profile fields   | Not set       |

# Registration - OAuth, SAML



## Configuration for OAuth and SAML protocols

| Setting                             | Description  | Default Value  |
|-------------------------------------|--|--|
| Enable registration using OAuth     | Allows registration/login via OAuth (Google, Facebook, etc.)                               | On   |
| OAuth button positions              | Specifies the position and size of OAuth buttons on the login page                         | Enabled Microsoft, LinkedIn, Dropbox, Google providers |
| Allowed domains (OAuth)             | Restricts OAuth registration to specific domains   | none   |
| OAuth document protection providers | Which OAuth providers can be used to verify the identity of an external document recipient | Enabled Microsoft, LinkedIn, Dropbox, Google providers |
| SAML enabled                        | Allows registration/login via SAML   | Off  |
| SAML SP Configuration               | Allows generation of Service Provider metadata XML for SAML integration                    |  |
| SAML IDP Configuration              | Uploads the generated IDP configuration XML for SAML integration                           |  |
| Default internal group              | Group assigned to new users registered via conventional methods.                           | Individuals  |
| Default OAuth group                 | Group assigned to new users registered via OAuth   | Individuals  |
| Default LDAP group                  | Group assigned to new users registered via LDAP  | Individuals  |
| Default SAML group                  | Group assigned to new users registered via SAML  | Individuals  |

# Registration - Other

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| Setting               | Description   | Default Value |
|-----------------------|---|---------------|
| Allow password change | Allows local password change/forgot password (useful for AD accounts) | On            |
| Inactive timeout      | Automatically logs out users after a period of inactivity             | 1 Month       |
| Hidden notifications  | Specifies types of notifications hidden from users                    | none          |



Settings related of look & feel, colors, logos. Detailed settings are available in teh designer under Open Live Preview

| Setting               | Description   | Default Value       |
|-----------------------|---|---------------------|
| Header logo           | Main logo for the application in SVG                      | Circularo Logo      |
| Header logo PNG       | Main logo for the application in PNG                      | Circularo Logo      |
| Favicon               | Image displayed next to the page title in the browser tab | Not set (Circularo) |
| Manifest              | Icon of the app when saved as a bookmark on the desktop   | Not specified       |
| Favs                  | Icon used on web browsers to represent a website          | Not specified       |
| Icon size             | Size of the icon in pixels                                | Not specified       |
| Icon file             | File used for the icon                                    | Not specified       |
| Email logo URL        | Logo for email notifications                              | Circularo Logo      |
| Primary email color   | Primary color setting for emails                          | #0636B5             |
| Secondary email color | Secondary color setting for emails                        | #0D42CC             |



## Setting specific for the mobile view

| Setting               | Description  | Default Value   |
|-----------------------|--|---|
| Navigation order      | Defines the left navigation menu for mobile devices                        | landing_page, /, all_documents, waiting_for_others, inbox, completed, failed, /, my_files_plain, shared_files_plain, /, starred, recent, my_shares, shared_with_me, trash, /, contacts, preferences |
| Detail view           | Allows modification of subsections and their order in the document detail. | preview, detail, history, comments  |
| Landing page setup    | Customizes the mobile landing page (dashboard) layout                      | JSON Structure  |
| Mobile default home   | Defines the default page after login and workflow actions                  | Dashboard   |
| Mobile document table | Sets which items are visible in the document table                         | JSON Structure  |



## Setting related to custom SMTP service

| Setting                       | Description   | Default Value           |
|-------------------------------|---|-------------------------|
| Host                          | Client or internal SMTP host address for sending emails.                          | Not specified           |
| Secure                        | Turns secure connection on or off   | No                      |
| Port                          | Port to connect to the email server.  | Based on Secure setting |
|                               | Automatically set based on the "Secure" setting (465 or 587).                     |                         |
| Username                      | Authentication username (login) for the SMTP server                               | Not specified           |
| Password                      | Authentication password for the SMTP server                                       | Not specified           |
| Sender Name                   | Name displayed as the sender in the email message                                 | Not specified           |
| Sender Email                  | Email used to send the notifications  | Not specified           |
| Max email attachment size     | Maximum size of email attachments sent via Circularo (in bytes)                   | 19922944                |
| Send audit trail on complete  | Automatically sends the audit trail via email when a document is completed        | Yes                     |
| Email links to detail preview | Email links direct to the document preview page instead of attaching the PDF file | No                      |

## Other settings

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- Email templates - this section allows for modification of content for each email notification type generated by the system. The email are defined in the HTML format
- Editor - this section contains all the settings in text format, which allows for easy editing for experts as well as exporting and migrating between instances or organizations

