Monitoring and Managing OneSpan Transactions

Senders can monitor the status of their transactions and manage in-progress transactions from the SOM eSignature Portal dashboard.

Click on the **Transactions** menu to see all the transactions you have sent. You can see *In-progress* and *Completed* transactions in the *Inbox* and transactions that have not been sent in *Drafts*. There are also options to view archived and trashed transactions.

If you click an incomplete transaction that is **In Progress** (as viewed in the Status column), a screen showing the transaction opens (see image below) with several options.

- You can download a summary of the transaction up to this point.
- Send a reminder to recipients that have not yet signed the document.
- Download the signing package. This will be a zipped file containing PDFs of the documents sent with the transaction.
- Edit the transaction. You can change the list of recipients and the documents. However, the transaction will revert to draft status and the recipients cannot continue to review and approve the document(s) until the transaction is re-sent. When re-sending, this starts the workflow over and anyone who may have already signed the document will need to re-sign.
- Trash the incomplete transaction. This will stop recipients who have not signed from signing the document(s). Trashed transactions can be restored or permanently deleted.

< Test 2 for 5323   *In Progress*
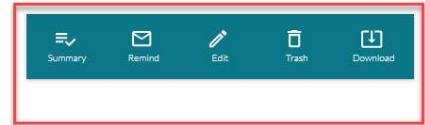
Documents

1 Electronic Disclosures and Signatures Consent   👁

2 blank   👁

Recipients

Signing order was set

1 Bryan Kay   kayb@michigan.gov

2 Karen Watson   watsonk5@michigan.gov

If you select a document with a **Completed** status, a screen with the transaction details will open (see image below), and you have four options.

- Download the completed documents. Senders must download all documents within 30 days of completing the transaction, the portal cannot be used for storage of documents.
- Download a PDF report that contains an evidence summary of the transaction. This is a detailed audit trail of all signing activity that took place. Some senders will want to save this with the completed documents.
- Archive the transaction if you no longer need to reference it but are not ready to send it to trash.
- Trash the transaction, if you no longer need it. **Note**: trashed transactions can be restored or permanently deleted by the sender.

< Test234   *Completed*
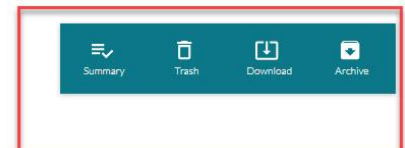
Documents

1 Electronic Disclosures and Signatures C...   ✓ 👁

2 2124 for test   ✓ 👁

Recipients

Signing order was not set

Bryan Kay   kayb@michigan.gov

Chris Roe   roec@michigan.gov