

TrustIT User manual EN



outsourcing services - submit message tracking, archiving and BMR - User's manual



Standalone archive and BMR - User's manual

Key Terminology:

Service	Outsourced document archiving provided by service provider's application
Application	SW tool of provider used for providing service to customer
AUTACK	Confirmation message about electronic signature check result
Certificate	Digital certificate to secure communication between User and application by encrypted protocol
Customer	Partner to which is service provider contracted to provide service
Data Format	Layout of electronic files – text or binary data for example EDIFACT, XML, PDF, TIFF etc.
Document	Message containing all predefined elements for particular message type
EAN, GLN	GS1 International location identification
EDIFACT	International standard
eXite	Service provider's international business communication platform
Hash	Data stamp/ data fingerprint, unique bits chain - result of cryptographic algorithm usage over data/interchange
Interchange	File containing single messages transferred in an envelope (In EDIFACT standard – Interchange)
Metadata	Set of information tags/keywords about stored messages used for further processing, search and identification of such messages
Message	The smallest possible unit to be archived = Document
Message type	Group of message with the same metadata – for example Invoice, Order
Non structured data formats	Mainly data in PDF, JPG, ZIP etc. formats, opposite of structured data formats
Service provider	Editel CZ, s.r.o.
Structured data formats	Mainly data in EDIFACT, XML or TXT formats eligible for automatic processing
SSL	Secure Sockets Layer (HTTPS)
User	Person authorized by customer and provided by user account and service access
User's role	Range of user's rights given
WORM Medium	Write once Read many non rewritable data storage medium.

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1 Introduction

Hand in hand with the increasing spread of automation of business processes in a wide variety of areas of business and public services and growing number of circulating electronic documents, reliable monitoring solution of such processes become a must. EDITEL trapped this trend as an opportunity to businesses to run their operation more efficient and developed a state of the art solution Business Monitoring & Reporting (BMR).

It is designed to evaluate a status of business process and to present relations of documents within any business case. BMR extends EDITEL Archiving solution provided as a service - submIT archive.

The EDITEL Solution ensures the highest security standards and fully supports processing of any document types and formats of objects, but in particular those of EDIFACT.

In addition a fully automated interface between eXite® Business Integration Network and BMR –was developed in order to assure a seamless, efficient, and traceable data flow between the communication services of eXite® and BMR. With all the cutting edge technology, latest security standards behind, EDITEL managed to build a solution, which is easy to access and easy to work with as well as easy to scale and adopt for new business requirements in the future.

2 Scope of services

The solution is reachable over the Internet as an on-line service.

Services provided

- search and preview of processed messages
- trustworthy long-term archiving
- trustworthy export of archived content
- document tracking, monitoring and evaluation of business process

- visualization of documents relations
- comparing of content of related documents
- approval workflow on documents
- manual upload of documents via web interface
- sending of various reports

3 System requirements

To access the service only regular internet connection and one of the supported browsers listed below are required. The communication with the server providing the service is secured by SSL. On the user's side it is necessary to import provided SSL certificate into browser/operating system to secure communication between server and client.

There is no further need for installation or other interventions in the software or hardware components.

List of supported web browsers:

- Internet Explorer version 10 and beyond
- the most recent version of Firefox
- the most recent version of Google Chrome

4 Service access

The service is available on-line at <https://www.ediarchive.eu> .

Credentials necessary for service access can be obtained from a service provider under the contract.

A prerequisite for logging in is a SSL certificate imported in the web browser. The user fills up his credentials and confirms it by clicking on "Login".

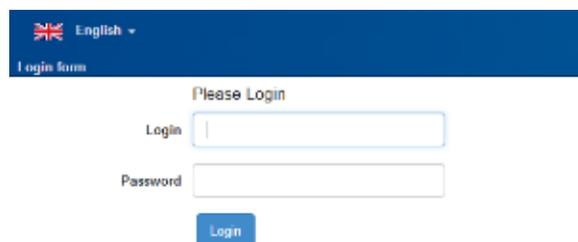


Fig. 1 - Initial screen of service

5 Application description

The service is available through the application controlled within an internet browser window.

After logging into the application the user is redirected to the application home screen. Home screen of application may contain important information or announcements. Please pay attention to them. The application is operated as a standard web page.



Fig. 2 - Home page screen

Use links **Home**, **Browse**, **My profile** in main horizontal menu for navigation within the application.



Fig. 3 – Main menu

For quick reference of current location in the application serves navigation bar located below the main horizontal menu.

The name of currently logged user is displayed in the top left corner of the window. Click on user name expands drop down menu. Menu items allow modification of user information, modification of Code-list /Master data and logging out.



Fig. 4 – Logged user

In the top right corner there is a language selection menu.



Fig. 5 – Language selection

6 Main functions

6.1 Document Search

Click **Browse** item to display drop down menu with available document types.

This menu is used for selection of document type you want to search. Each document type is associated with a search form specific for selected type of document. Available metadata for document type may differ. Click the type of document and fill in search criteria to get desired documents. Only one type of document can be searched at a time, e.g. invoice, regardless of its data format - EDIFACT, PDF, etc.

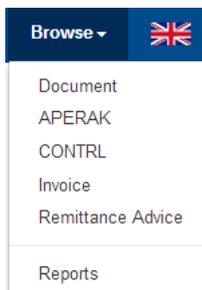


Fig. 6 – Document types menu

Search form contains all the fields through which the search for documents in the application may be performed. Search fields correspondent to metadata defined for already searched document type.

Placing of the mouse cursor on the label of any field in a form invokes available contextual help as a tooltip.



Fig. 7 – Search form with tool-tip displayed

Search form of each document type is divided into two parts, Basic and Advanced Search. Using of Advanced search allows getting more precise results. By single-click on button **Advanced** located below the search form all available search fields are displayed.

After the filling-in of the required values and clicking on the button **Search** or simply by pressing enter on keyboard the content of the form is sent to the application. Subsequently, the list of results that match sent criteria is shown. Each row of the list of results corresponds to one document.

To get more work space on your screen you can hide or display search form simply by click on small arrow located on the left of search box **Text search**. User can decide whether to display or hide basic search form. Basic search form is displayed by default. There is a switch on **My profile** page called "Show Expanded Grid Search" for this purpose.

i In regards to query complexity and expected number of documents matched the retrieving of search results may take longer. During the search or loading of search form progress bar may appear what indicates that application is working.

ID	Invoice no.	Invoice date	Document reference	Stage	Sender	Recipient	Document ID	Supplier	Delivery place	Delivery note number	Archived	Total amount
1	50140250	31/03/2014	50000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000
2	50140251	31/03/2014	50000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000
3	50140252	31/03/2014	50000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000
4	50140253	31/03/2014	50000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000
5	50140254	31/03/2014	50000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000	5000000000

Fig. 8 – Search result

If too many documents fit the search criteria a final list is trimmed and only the newest ones are displayed. In such case a warning message is displayed as well.

The application displays as many records per page as set under the user profile menu in "Number of rows in message grid" parameter. For more information see chapter **My profile**. Default and value recommended for optimal performance is 100. For queries returning more than predefined documents per page a result paging will appear under the main menu.



Fig. 9 - results paging and search notification

- 100 documents per page is an optimal value
- Searching of high number of documents may lead to decreasing of search performance and delays in user interface responses.
- Rather define more precise criteria.
- At least one criterion must be defined in search form in order to start document search.

6.2 Export of search results

Export of search results into MS Excel or other spreadsheet software, CSV or XML data format is available in drop down menu "Export" above the search form. Selection of data format invokes export of all visible documents. Combination of CTRL key and left mouse click on row with document allows to choose and export particular documents. Export function is available from context menu under the right click.



Fig. 10 – Export to MS Excel, CSV, XML

6.3 Search filters

Users can define, store and manage own search queries. Such Search filters may significantly improve speed of getting desirable results and prevents from typing of frequently used queries over and over again.

To create new Search filter user has to fill-in criteria into search form fields and perform search. With results button **Remember** appears on the right below the search form. Left mouse click on this button opens dialog with Search filter name and its definition. At this point user is allowed to check and eventually change criteria filled-in moment before in the search form, write a name of the Search filter and click **Save** button in the bottom of the dialog.

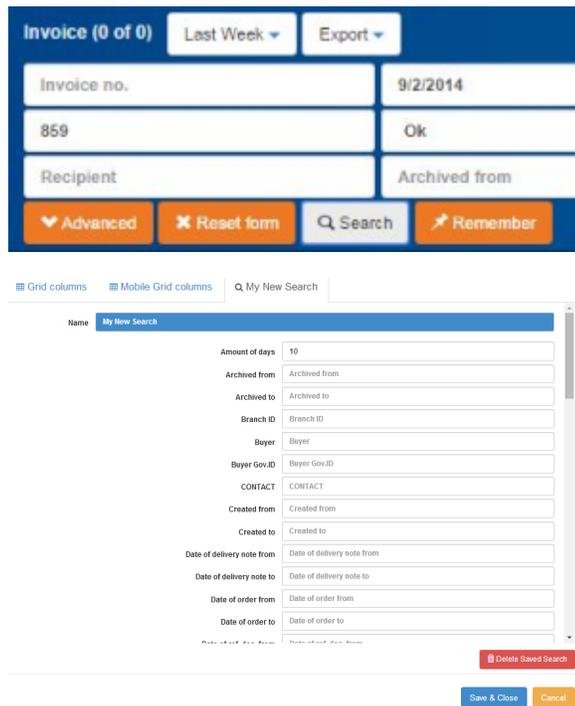


Fig. 11 – New Search filter definition and saving dialog

Search filters defined by user are listed in drop down menu located left to the Export menu. This menu contains also default System filters like **Today**, **Last week**, **Last month**. System default filters can't be removed. Filters can be easily managed by clicking on item **Manage search** in the same menu.

Default search filter is predefined to display all documents archived today and is applied during the page loading.

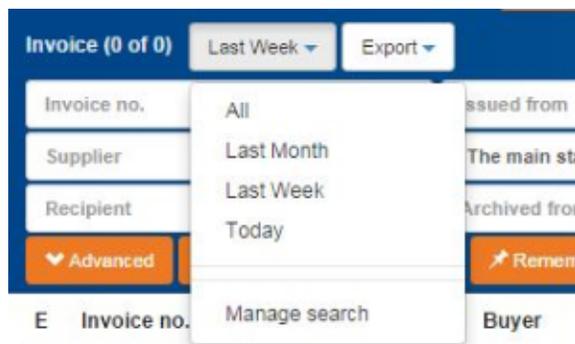


Fig. 12 – Available Search filters and access to search filters management

6.4 Customization of search results grid

Sorting of results displayed (ascending or descending) will be performed over the documents by clicking the name of the field in the header of the search results shown.

Search result columns/metadata visibility can be customized via **Manage search** item located in the Search filters menu described in previous chapter.

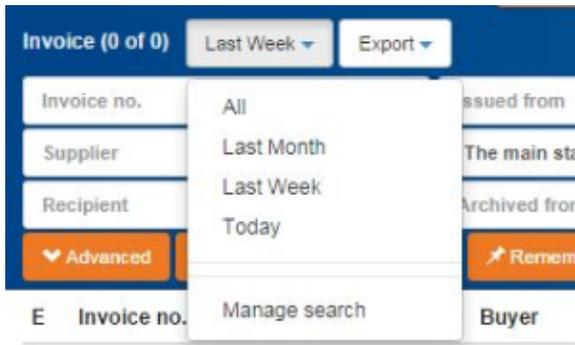


Fig. 13 – Columns visibility button

Selecting of **Manage search** item from menu opens dialog with all available and already chosen columns /metadata. User can choose desired columns by simple drag and drop of items from left to right. New settings are automatically applied and saved.

Too many columns selected may lead to word wrapping. For document status visibility select column "**S**", for note column "**N**". For meaning of other flags see chapter Message flags.

Available columns/metadata may differ by Document type.

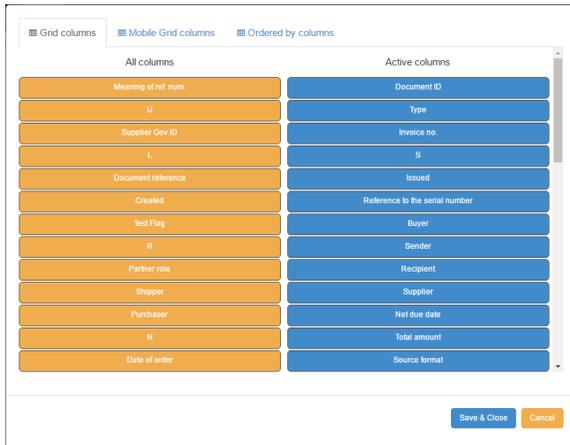


Fig. 14 – Columns visibility selection

To change the order of the columns, click and drag the column until it appears at desired position.

Order by columns = default sorting of search results

6.5 Message flags

Each row in search results list can contain several flags with different meanings. Some of these flags are visible only for users with appropriate User role.



Fig. 15 – Message flags

A flag in column **E** informs that the document can be exported on server hard drive. Document is exported in the same format in which it was delivered to the system.

A flag in column **C** informs that document is part of Hash chain and is time stamped or optionally signed by issuer. No icon means that document is not a part of Hash chain nor signed.

A flag in column **N** informs that there is a comment attached to the document. No icon means no comments attached to the document. By double clicking on this place new form or list of already created comment(s) pops-up.

A flag in column **S** informs about status of the document. If there are Linking rules defined for document and document is confirmed by any acknowledgement a status is evaluated automatically or can be set manually by user. Status may take several colors and icons according to current phase of documents linking. Positioning of mouse cursor on the status icon displays detailed tool-tip.

-  OK – Confirmed by positive acknowledgement
-  MISSING – waiting status, not all related messages has arrived
-  REJECTED – not accepted, negative acknowledgement has arrived
-  WARNING – conditionally accepted by COMDIS, check reasons

Double click opens visual representation of business case in separate window or tab. Single click on status icon expands visualization below the document so called instant graph.

A flag in column **R** is shortcut to message source preview. By double-clicking on this icon page with message source opens in separate window or tab. Icon may vary according to document's data format.

A flag in column **D** is another indicator of document status. If there is Comparing rule defined for document, there will be displayed result of document content comparison.

Flag in column **L** indicates existence of related documents linked to this document. Expansion of plus sign shows references to linked documents.

 Detailed information about the document opens mainly in separate window or tab. Due to this fact it is necessary to enable pop-up windows for this internet domain in your browser.

6.6 Context menu

A context menu appears upon user interaction, such as a [right mouse click](#) on selected highlighted document. The context menu offers a list of choices/actions that are available for this document.

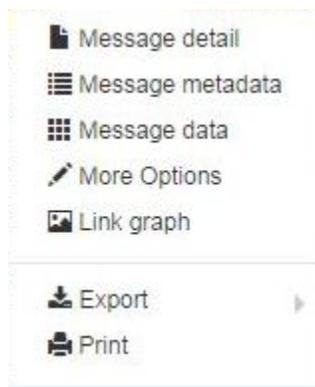


Fig. 16– Context menu

6.6.1 Message detail

See chapter [message detail](#).

6.6.2 Message metadata

See chapter [message metadata](#).

6.6.3 Message data

See chapter [message data](#).

6.6.4 PDF file

It allows viewing and saving message as a PDF document unless a message is already in PDF format. In that case the PDF file option will be disabled.

6.6.5 Link graph

This option is about to visualize a graphic representation of selected document and documents or acknowledgements related and linked to this document.

Another option how to open a graphic layout directly from the result search grid is by double-click or single-click on the Status icon placed in the "S" column.

For instant visualization within the results list bellow the selected document click once on icon in column "S".

Different states of documents displayed in the graphic layout are indicated by different colors.

Basic information about selected message in a graph can be displayed by the single mouse click within the message object.

The right mouse button on any document or acknowledgement in the graph shows context menu.



Fig. 17 – Visualization of document relations



- Graphic relations are available only for documents where Linking rules are applied.
- Only users with appropriate User role can see the graph.

6.6.6 Comment

User is allowed to add a comment to any document. Displaying and edit of comments is possible selecting of Notice item in the context menu or directly by double-clicking on the Notice icon placed in the "N" column.

Build in text editor is available for creating and modifying of comments.

Fig. 18 – Comments editor

6.6.7 Edit linking

This function allows changing of main status of the document as well as manually edits relations to other documents or acknowledgements. The description field shows more information about status.

Fig. 19 - edit linking dialog



- Manual modification of main status is not propagating and does not influence other linked documents and acknowledgements.
- This feature is enabled based on User role.

6.6.8 Delete messages

Click on this item in the context menu displays the delete Confirmation page. There are two options available to delete messages

- The first method permanently deletes all messages marked for deletion.
- The second method physically deletes only bodies/raw data and keeps just metadata extracted from the documents. This allows keeping relations between the messages and documents can be relinked in future.

It is possible to make multi-choice by holding CTRL key and selecting of documents by mouse click.



- This option is available only for administrators of the service.
- Documents that belong to Hash chains and are intended for long-term archiving can't be deleted neither by administrator.
- Documents without document bodies can't be re-parsed anymore.

6.6.9 Re-parse messages

The re-parsing means that a marked message is being processed like a new incoming message. This process deletes document's metadata and re-extracts it again from the original file. This action does not affect original data. Re-parsing function is available in context menu.

It is possible to make multi-choice by holding CTRL key and selecting of documents by mouse click.



- This function is available only for administrators.
- If Linking rule is applied on document, linking process will be started automatically after the re-parsing process.
- Only structured data formats can be re-parsed.
- Re-parsing of documents may take longer due to consecutive process of reconstruction of linking.

6.6.10 Re-link messages

The re-linking of messages is automatic process that deletes any existing links between messages and rebuilds ones with available documents according to the Linking rules and references extracted from documents. This is useful in case when a new Linking rule for messages which have already been stored in the archive has to take place.



Relink process does not affect metadata nor content of original document.

6.7 Manual linking of documents

Service enables to manually link documents even they do not have any reference to each other. If the user has sufficient permissions icon for manual linking appears on right side of visualization.



Fig. 20 – Manual document linking

By clicking on this icon a dialog and wizard for document linking appears.

The screenshot shows a dialog box titled 'Manual linking - Choose message'. It features a search bar at the top. Below it is a 'Type group' dropdown menu currently set to 'AUTACK'. Underneath is a table with columns for 'Recipient', 'Sender', 'Amount of days', 'Sender', and 'Recipient'. Below the table are fields for 'Created from', 'Created to', 'Archived from', and 'Archived to'. At the bottom, there are buttons for 'Advanced', 'Reset form', and 'Search'.

Fig. 21 - dialog for manual linking

 Re-parsing or re-linking of manually linked documents deletes this relation.

6.8 View and print

6.8.1 Message detail

Double-click on the row of the search results list to preview the message in a readable format for structured data formats. New window or new tab will be opened depending on browser settings. Alternatively there is also possible to choose Message detail item from the context menu.

For non-structured data formats row clicking displays a dialog box allowing download of the required document to a local user store.

6.8.2 Message data

Source or original data format of the document can be viewed by double-clicking the icon in the column „R“ in the results list. There is also the option to choose Message data from the context menu. This view is available only for structured data formats.

```
UNA: ? UNB+UNOC:3+905555555175:14+9055555552175:14+110919:1305+34+FRVOCUFRH+34001+RNVOC:D:9GA:URI:EAAR00RUSH+940V+1+01+1+2+2+1+1+34
0001+2014020:10019:02001:004+1:01:48:1102040149:---:MarekH4:---:MarekSOSR+300+2014+17+02DTM+17:20110919:102DTM+25:20110919:102D
TM+11:20110919:102DTM+35:20110919:102PA+-:42PT+ZZZ+++GR:Oleary sud Bratislava 1, Odd Plo, Hozba 1055+8597+CON:862501EDTM+171:2011091
9:102RFP+DZ:382366DTM+171:20110919:102RFP+AV:11107TM+171:20110919:102MAD+BY+60900000401:3+Maine Cash & Carry 01 k s r o =Sencica cest la 181+Hanka jri
Dvay+100202RFP+VA:392021020701MAD+CH+4589000000401:39MAD+DP+610900013108:RVA+W+659000000401:RVA+D+U+MADCEL:03:3+PAPSTAG:Olearycash Vesteble AG-
```

Fig. 22 – Message source data for EDIFACT data format

 Message source data is reconstructed from original interchange. If the message is part of multi-message interchange, displayed is only particular message and original interchange header and footer are attached to the message. To see whole interchange source, user must have the DOCUMENTVIEW role assigned.

6.8.3 Message metadata

Information about the message can be displayed via **Message metadata** item from the context menu. Page with message information consists of several parts.

6.8.3.1 Message envelope

6.8.3.9 Primary and secondary relations

If any relation between documents and acknowledgements exists, it is displayed in this part of window.

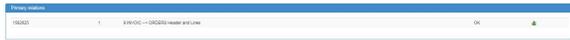


Fig. 30 – Document relations

6.8.3.10 Data formats

In this section there are references to application's internal XML format documents, i.e. (in the case of structured data formats) results of document conversion to a special XML format as for example required by Hungarian law and PDF document preview if available.



Fig. 31 – Special data formats

6.9 User's profile

By click on your login name/account name in the right top corner menu drops down. Menu contains three items "My profile" to see and modify user's profile, "User look-up table" and "Log out".



Fig. 32 – User profile maintenance menu

6.9.1 My profile

Shows details of currently logged user. Information like email and phone number can be modified on this screen.

i Parameter "Number of rows in message grid" affects the number of documents displayed on page what influences the search results retrieving time.
Setting of this value to high number may lead to unwanted decreasing of search performance and delays in user interface responses. Rather define more precise criteria.
Recommended value is 100.

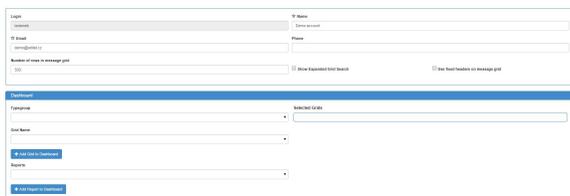


Fig. 33 – User profile modification.

The button for password change is placed in the right top corner. Password can be changed by entering the current password, than new password and its confirmation.

