User Guide

Long Term Archiving (LTA) Service

Index

Version register

Ver/Rev/Draft No	Date of issue	Description	Note
1.0	March 2020	First draft	
2.0	September 2021	Revisions and updates in all chapters	
2.1	October 2021	Chap. 5.2: update of assistance address	
3.0	May 2022	Revisions and updates in all chapters	
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1   INTRODUCTION

The Namirial Spa preservation system is the web-based platform that allows the automatic signature, archiving and preservation of electronic documents in compliance with the regulatory framework.

The main features are:

- automated definition of the legal entities (companies) owners of the documents;
- automated definition of document types;
- profiling of users with different roles and permissions;
- automated definition of the timing and rules for archiving and preserving documents;
- acquisition of document packages and management of the metadata;
- optional automatic digital signature service;
- search, consultation and exhibition of preserved documents and packages.

2   ACCESS AND CONFIGURATION OF THE USER PROFILE

2.1   Access

For secure access to the web interface of the preservation system, the user is recommended to always use the https channel at the URLs provided during activation (test or production).

After connecting, users authenticate themselves by entering the credentials previously communicated to them by Namirial. To log in, after entering the username and password, the user must click on Login (figure 1).
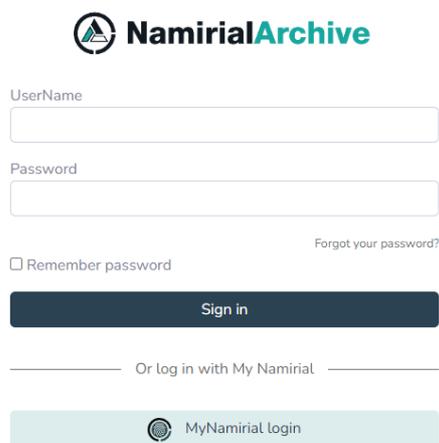

Figure1- Secure access to the system

Upon first access, the user will have to change the password and answer a security question whose answer is previously communicated by Namirial.

The password must be robust and compliant with current provisions on data processing and have a minimum length and contain at least one lowercase letter, one uppercase letter and a number. Each user is responsible for exclusively controlling their own access password.

Once logged in, the user will have access to the Home page (figure 3).
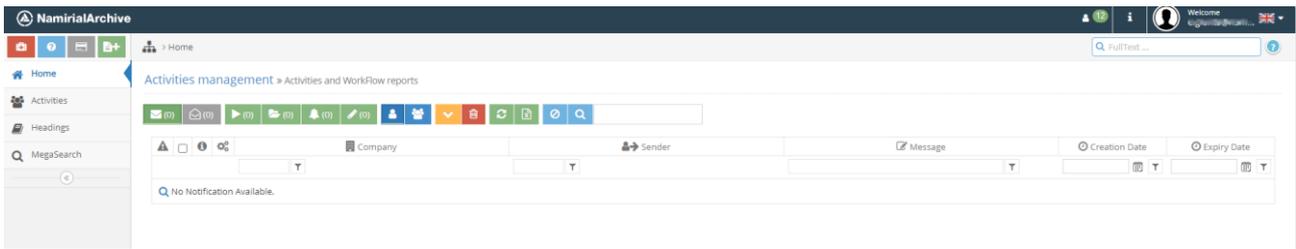
Figure2- Home page

To exit the interface, the user will select the arrow next to their alias and choose Disconnect (figure 4).
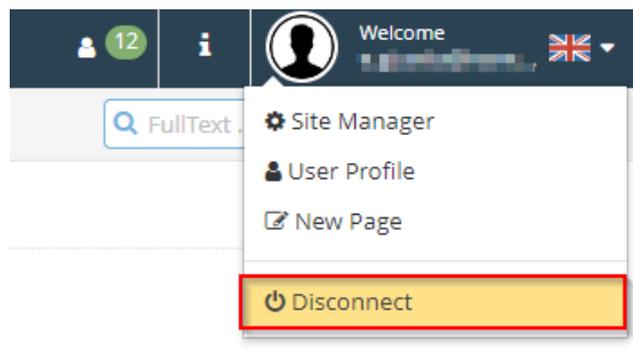

Figure2- User Profile Selection

2.2 User Profile Configuration

After the first login, the user will be able to modify the data associated with their profile by selecting the arrow next to their alias and choosing User Profile (figure 5).
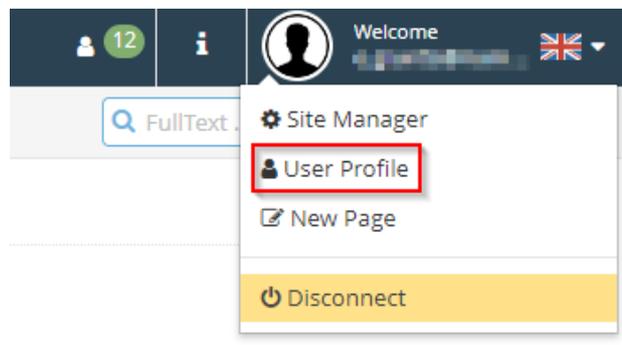

Figure3- Select Disconnect

In the interface that will be displayed, the user will be able to change the data present in the Security and User Data Sections.

2.3 Security Section

To safely manage access, the user can carry out the following activities:

- Change Password: the user, after selecting Edit, will write the new password and confirm it by filling in the appropriate spaces (figure 6).
- Changing the Security Question and Answer: to ensure maximum security and confidentiality of your credentials, it is advisable for the user to also change the security question and answer; to do so, he will write in the appropriate spaces the new security question and the related answer that the System will request from him in the event of a subsequent change of his access password (figure 7).

NB: the fields in bold marked with an asterisk must be filled in

Figure4- Change Password

2.4 User Data Section

In this Section the user can modify the fields Name, Surname, Tax Code, VAT number, Role, Telephone, Mobile and User E-mail (figure 8).

Figure5- Modification of the User data section

Finally, to save the changes made, the user will select the Update button ✔Update . The service will notify the user that the update of the changes made was successful by showing the following message

User successfully modified.

3 SEARCH, VIEWING AND DISPLAYING DOCUMENTS AND PACKAGES

3.1 Search and view documents

To view the documents preserved in the System, the user will select the box 🔍 MegaSearch (figure 9)
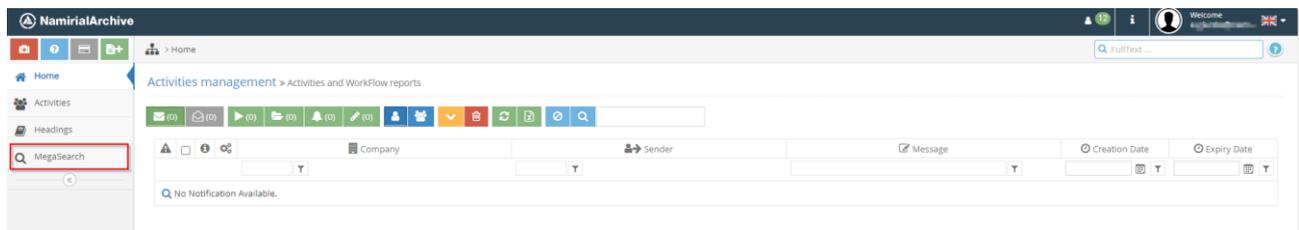

Figure6- MegaSearch

3.1.1 Generic search

To search for documents, the user must open the "Select Company" drop-down menu on the left and select the company. From the drop-down menu on the right, "Select Type", you can choose the document type for which you want to view the documents (figure 10).

Figure7- Opening the "Select Company" and "Select Type" drop-down menu

As a result of the search, the user will view, for the selected company and document types, all the documents preserved in the system (figure 11).

Figure8- Viewing documents preserved in the system

The user can view a document by clicking on the file name (figure 12) or download it by selecting Download file (figure 13).

Figure9- Selecting the title of a document

Figure20- Download a document

The user can request the report of the documents of the Preservation System by selecting the reference icon (figure 14) and entering an e-mail address designated for receiving the Report (figure 15).

Figure11- Download the Excel file with the documents report

Figure32- Download the Excel file with the documents report

3.1.2 Search for documents by filling one or more metadata

To carry out a search by valorising one or more metadata, the user must open the Search Panel (figure 16);

Figure43- Opening the Search Panel

You will have to complete one or more metadata as in the example below and select Search (figure 17)
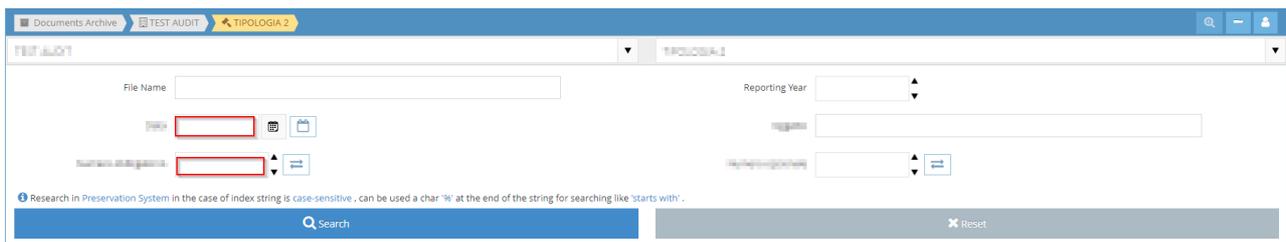
Figure54- metadata form and document search

To delete metadata already entered and insert new ones, the user will instead select the Reset icon.

In the case of searches through the filling of Date type metadata, the user will be able to search for documents by entering an exact date or a date range.

When searching for documents whose date is exact, the user will select the Open the calendar popup icon 📅 placed next to the metadata, it will choose the day, month and year from the menu and finally select Search (figure 18).

Figure65- Selection of Open the calendar popup

When searching for documents for which the date is included in an interval, the user will select the Date Interval icon located next to the metadata, choose the days, months and years that define the interval and finally select Search (figure 19).
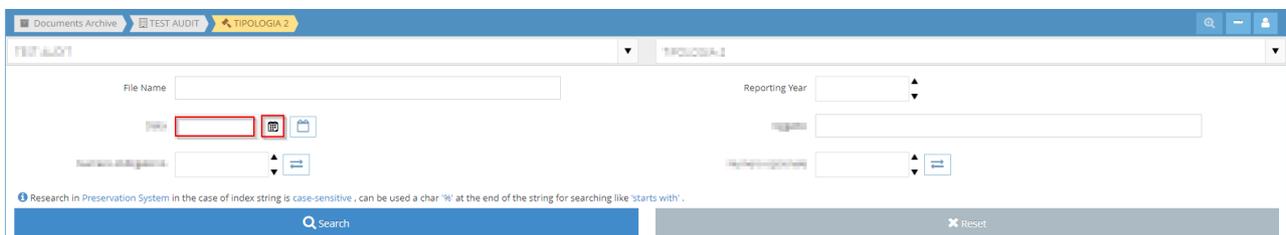

Figure76- Selection of date range

3.1.3 Configuring indexes (metadata) and additional information to display

The user has the possibility to select the metadata he wants to view by clicking on the Viewing Preferences icon (figure 20).
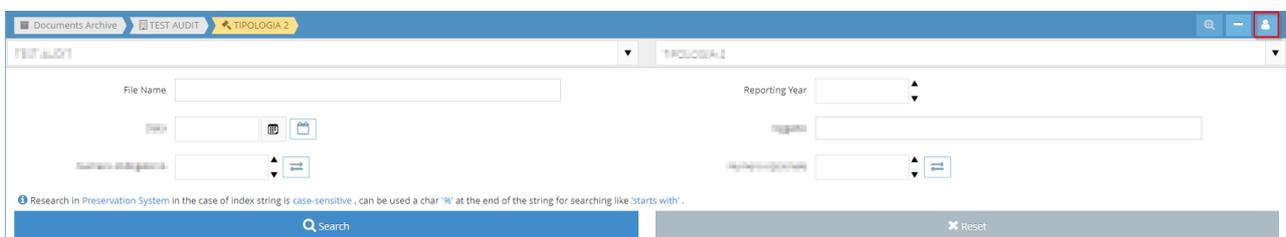

Figure17- Selecting the Display Preferences

The information that can be associated with the documents searched for is of two types:

- Indexes: specific metadata associated with the document type
- Additional: additional information associated with the documents, namely:

– Note
– Insertion date = date and time the document was inserted into the preservation system.
– Reference year of the document = reference period of the document in the preservation system
– Preserved = hammer-shaped icon that highlights the preservation status of the document.

Green hammer indicates that the document has been preserved (the Archival Information Package has been generated).

Red hammer indicates that the document has been processed but has not yet been preserved.

To select the indexes (metadata) and additional information to display, the user will flag the corresponding boxes (figure 21); to save the changes made, select Save and then Close.
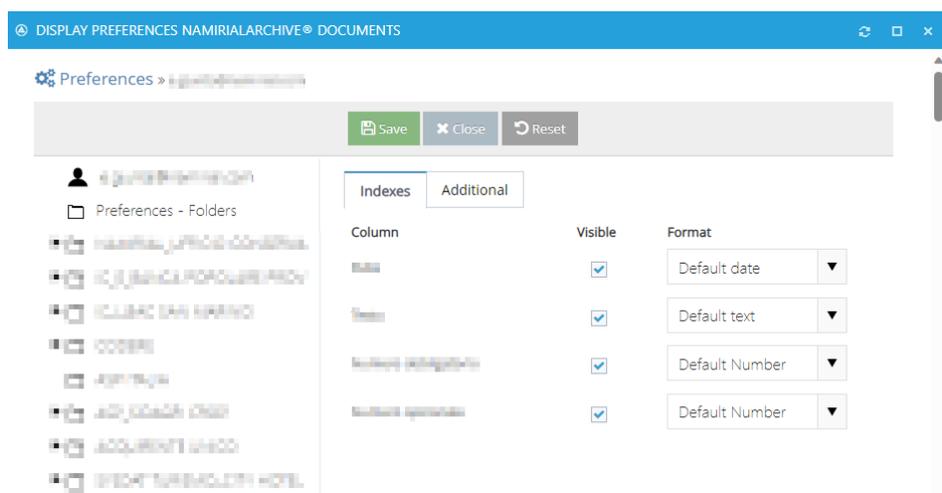

Figure18- Selection of indexes (metadata) to display for documents of the selected type

3.2 Viewing the indexes, downloading the Submission Report and Dissemination Information Packages

The preservation system allows the users to download the related Submission Report and export the Dissemination Information Package (DIP) for all searched documents, in order to have legal and compliant evidences of the preservation process.

Once the documents have been searched and retrieved, the user will select the Document Properties button (figure 22).
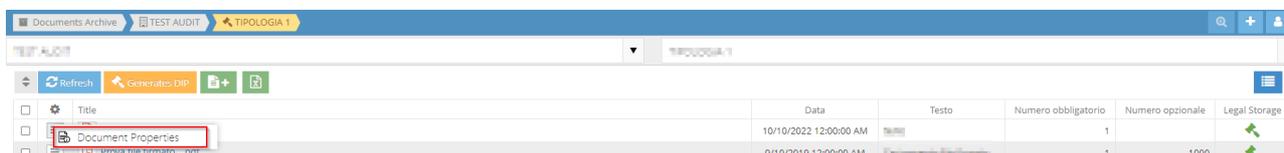

Figure19- Selection of Document Properties

In Document Properties the user will view the indexes associated with the document (figure 23).

Please note that, if the number of indices is greater than 10, these, although not viewable by MegaSearch, will be shown within this window.
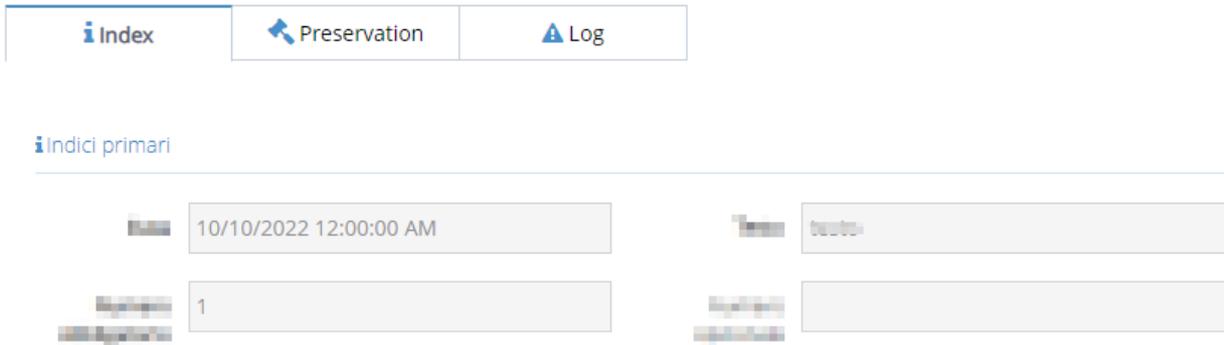
Figure80- Indexes (metadata) associated with the document

In Document Properties, by selecting Preservation, the user will be able to view the status of the preservation process and download the Submission Report and/or the Dissemination Information Package (figure 24).
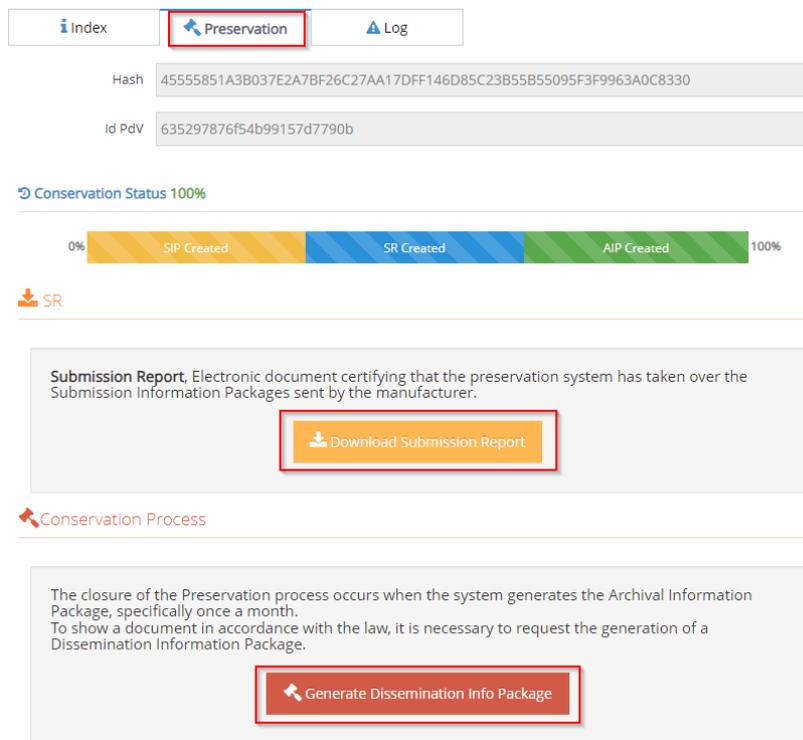

Figure91- Preservation status of the document and export of the Submission Report and DIP

The user will also be able to export DIPs containing all the documents searched for. To export the DIP the user must choose the searched documents he intends to export and select Generate DIP (figure 25).
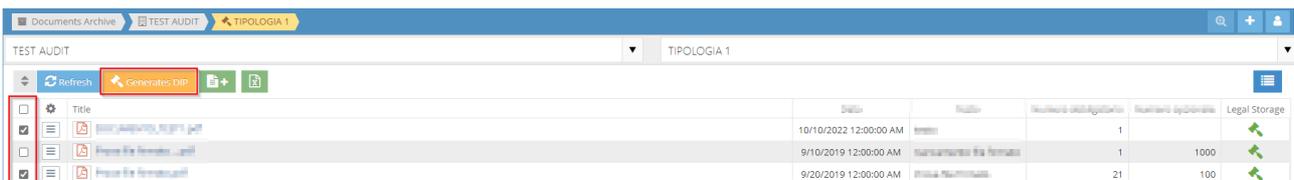

Figure102- Example of document selection for generating the DIP

4 AUTOMATIC SIGNATURE CONFIGURATION (OPTIONAL SERVICE)

4.1 Receiving credentials

The system allows to automatic sign each document before the preservation phase.

To configure the signature on the system, the Signer user will receive two communications containing:

- Username and Password credentials and a link to access the Private Area of the preservation system.
- Instructions protected by a password and information relating to the registration of the user: unique owner code, assigned device code, blind envelope number.

By following the instructions, the user will receive the credentials needed. Below are the basic steps:

- click on the link in the email, which will open a web page;
- Request the sending of the verification code to be entered in the appropriate field;
- if the code entered is correct the user will receive a new communication containing the code for opening the blind envelope.

4.2 Entering the signature credentials and granting delegation

From the User Profile interface the user will select Remote Signature (figures 26-28).

Figure113- Remote Signature Panel

Figure24- Confirmation of PIN

The user will have to:

- select the signature mode;
- enter the assigned device code (for information on signature, please refer to paragraph 4.1);
- insert the PIN by selecting Edit and confirm;
- delegate the Namirial preservation system to use the signature with an automatic procedure, by ticking the box next to the text granting the delegation.
- select, the icon ⚡ Test remote signature to proceed with a test aimed at displaying the signature holder's identification code.

The test is successful if the user sees the identification code highlighted in green.
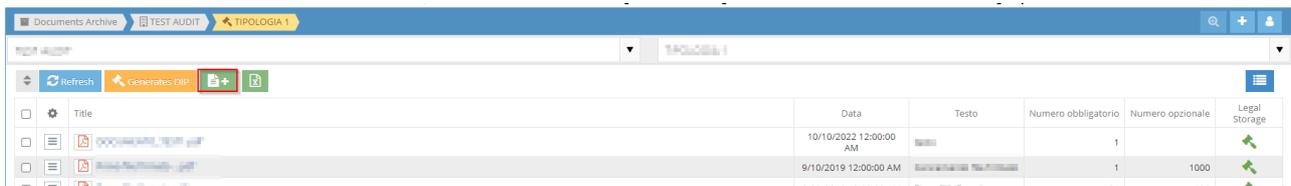
If the automatic signature test fails, the identification code is highlighted in red; in this case the user is advised to check that he entered the credentials correctly and that he has granted the delegation.

If the Test continues to give a negative result, the user can request assistance from Namirial via the support channels.

5 MANUAL UPLOAD OF DOCUMENTS

The users with the rights to upload documents can use the interface available in the application.

Once logged in, to start the indexing and preservation procedure, the user will select MegaSearch and, then, New document (figure 29).

Figure125- Example of selecting the New Document

From the Upload Documents form, the user must select the file to preserve (figure 30) and fill in the indexes (figure 31). Please remember that the indexes are different based on the specific document type.

ATTENTION

Below are the fields that must not be filled in:

- *Company*
- *Typology*
- *File*
- *Enable versioning on files*
- *Note*

The Reference year field is entered by default as the year of the document upload date. If the reference year is different from the year of the upload date (e.g. 2019 invoice uploaded in 2020), the Customer must remember to modify the field by inserting the correct year.

Figure26– Uploading a document

Figure27- Example of filling of the metadata related to the document to be preserved

Before saving, please remember that, in case of documents that are not digitally signed, to prevent the System from discarding them, it is necessary to disable the control (figure 32).

Figure28- Disabling signature check and document upload

Once the activity is completed, the service notifies the user of the generation and transmission to the preservation system of the Submission Information Package (SIP) containing the uploaded documents.

In case of errors (mandatory metadata not entered, file format not allowed, etc.) the system notifies the user of the failure of the upload process.