

X-ROAD

MISP2 USER GUIDE

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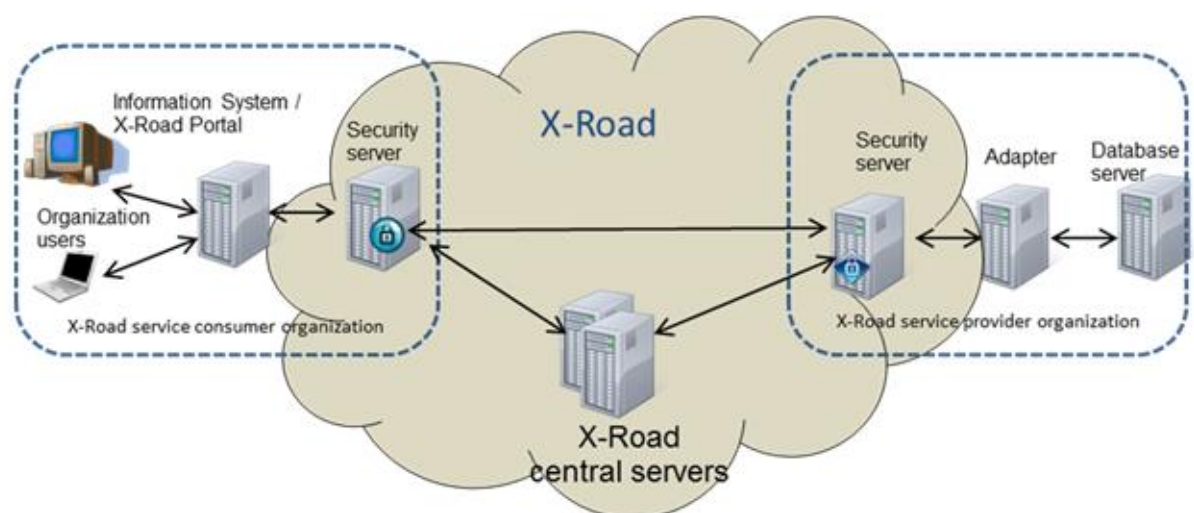
1 INTRODUCTION

This paper describes the use and management of MISP2 application. The structure of the document is divided according to user roles, each describing this role's actions.

1.1 X-ROAD

X-Road is a secure data exchange layer connecting the main databases of Estonian state. Many data producers who provide services and organizations using these services have joined X-Road.

The following figure describes X-Road infrastructure:



User communicates to the producer over X-Road which guarantees security of the data exchange. This is accomplished by using security servers and other X-Road infrastructure components. X-Road producers use adaptation servers to assure data conversion from database to X-Road data format.

1.2 MISP2 APPLICATION

MISP2 (*universal portal*) is an application that allows organizations to execute X-Road services opened to them.

1.2.1 Portal types

One can create and use four different types of portals in MISP2 application. This paragraph describes their main aspects and differences towards others.

The portal types are:

- **Information system of organization.**
 - One consumer organization is bound to the portal.

- User can only use e-services on behalf of the bound organization. User must also have user role and query permissions given by this organization.
- Services of X-Road producers are opened to the bound organization.
- **Citizen portal**
 - Citizen portal is a portal for public e-services.
 - Organization portal's special case where public user group is used. All authenticated users are considered to be in public user group.
 - User account is not required to enter the portal and use e-services.
 - Authenticated user may use all e-services which are opened in portal.
- **Universal portal**
 - Only one organization is bound to portal (organization managing the portal).
 - There is used a concept of unit. User roles and user permissions are bound to the portal unit. These roles and permissions are valid only under the bound unit.

For example in family physician portal the portal unit is a doctor.
 - E-services can only be used as a unit's representative, meaning query permissions and user role are required under the unit.
 - To use the portal, a new unit has to be registered by the representative person, whose representation rights are checked using X-Road producers standard representation rights query.
 - Under portal's organization rights (while not representing any unit) only meta-services are executed.
 - Services of X-Road producers are opened (depending of portal configuration):
 - To the bound organization.
 - To the portal unit organization
- **Business portal**
 - Special case of universal portal, where units are registered in Business Register of Estonia.
 - During unit registration, check query is sent to CCR. The response may include businesses with single or unknown representation rights. Unknown representation rights mean that additional confirmations are required from other unit's representatives to set units permissions managers.

1.2.2 User roles

The following user roles are used in MISP2 (roles in bold are thoroughly described in this document):

- **E-service user**
 - Uses e-services open to their user group in the portal.
 - Uses public e-services in the portal.
- **Service manager**
 - Manages metadata of e-services used in portal (refreshes query lists, service user interfaces and XSL stylesheets)
- **Portal administrator (Application administrator)**
 - Adds new portal and configures all required parameters (incl. portal managers setting).
- **Portal manager**
 - Manages metadata of e-services used in portal (refreshes query lists, service user interfaces and producer classifiers).
 - In the case of organization information system:
 - Manages portals query rights, user accounts and groups.
- **Portal manager (universal portal)**
 - Manages portals global user groups and their query rights.
- **Permission manager**
 - Manages user groups and accounts of the unit.
 - Manages user's e-service query rights of the unit.
- **Registrar (universal portal)**
 - Registers new units if allowed in the portal configuration. This role is automatically assigned to all portal users when it is allowed in portal configuration.
- **Representative person (universal portal)**
 - Registers new units.
 - Manages permission manager accounts of the unit.
 - In case of simplified permission management, manages user's e-service query rights of the unit.

1.3 SYSTEM REQUIREMENTS

1.3.1 Browser

The portal is available in the recent versions of popular browsers (Internet Explorer 8+, Firefox 3+)

To use this portal, following options have to be enabled in your browser:

- session cookies
- JavaScript

See your browsers manual how to enable them.

2 GENERAL INFORMATION

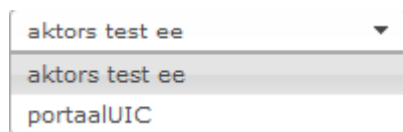
2.1 USER AUTHENTICATION

User account is required to access all portals except citizen portal, where pre-existing user account is not required. Portal manager is set by the portal administrator by creating new or using pre-existing user account. After that user accounts will be added by the portal- or permission managers.

Users of portal for officials (and not for citizens) must create a new user certificate to enter the portal.

2.2 PORTAL SELECTION

If there is more than 1 portal configured in the application, then portal selection box is displayed in the upper right corner. Here you can choose active portal. Every option contains portal's name separated by main organization name. Only public or user-specific portal are shown.

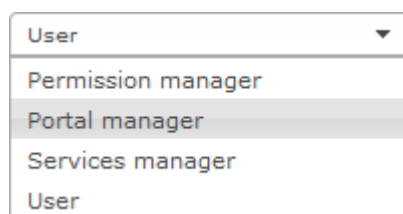


2.3 ROLE SELECTION

Role selection is done in the top right corner of the portal using the selection box. Information in the selection box is presented in the following format:


„<role name> (<active unit's name>)“ e.g. unit „school“ has a regular users' role „Regular user (school)“.

Example of role select:



In this example active user has „Permission manager“, “Portal manager“, “Services manager” and “User” rights.

2.4 FINISHING WORK

Having finished your work, the  button has to be clicked in order to end the current session and log out. It is recommended to close the browser to ensure session is completely destroyed.

2.5 HELP


To get help about current activity click the  button. Current document is then displayed.


2.6 ERROR MESSAGES

2.6.1 Error messages in forms

If there was a mistake in form filling, then field containing error will be shown in red and you can see an error message by hovering over this field. For example, when adding an invalid email the next error message is shown.

Must provide a valid e-mail.

Social security number	EE 
Givenname	KAROL
Surname	KARTAU
E-mail	<input type="text" value="aa"/>
Notify me about changes in this unit on e-mail	<input type="checkbox"/>



2.6.2 General messages

General messages for user are shown on the first line of the page content. Messages about successful actions are shown with green background, error messages – with red background, and warning messages – with yellow.

Activity carried out is not permissible for you

Topics not in use, contact your portal administrator in order to activate them.

Producers refreshed

2.6.3 Quick tips

There is a box with quick tips for user on the right part of every page of the portal. They change depending on the menu choice. For example, for menu “My settings” quick tip is shown like that:



Quick tips

Using this form you can view your e-services history. If you press the button "Clear the service log" your history will be cleared.

Tips are also shown when executing the service. These tips are added by the portal managers.

3 REGULAR USER

3.1 USER SETTINGS

While being in regular user's role, you can change your settings which are bound to the active unit by using the „My settings“ tab. There you can enter your e-mail. In some portal types (all except Citizen Portal) you can set if you want to be notified by an e-mail if your account has been changed. Changes to be notified include user role additions/removals and group affiliation changes.

Social security number	EE[REDACTED]
Givenname	KAROL
Surname	KARTAU
E-mail	<input type="text"/>
Notify me about changes in this unit on e-mail	<input checked="" type="checkbox"/>

Change notification can be ordered only if a valid e-mail has been filled in, otherwise the field will be disabled.

Example of the notification e-mail:

```
This message is autogenerated. Please do not reply
settings.
```

```
Changes in organization: Ministry x(1234)
You have been removed from following groups:
x
```

In the case of the Citizen Portal, the regular users do not have a user account, therefore no notification about user account changes can be ordered. The rest of the points mentioned in this paragraph apply on the Citizen Portal as well. Here is a picture of the user settings form in Citizen Portal:

Social security number	EE ██████████
Givenname	KAROL
Surname	KARTAU
E-mail	<input type="text"/>

3.2 E-SERVICES

3.2.1 Searching e-services

You can search e-services using the search field in the top right part of main menu.

Search criteria

Having entered service name or part of it, corresponding services are displayed as a list.

3.3 USING E-SERVICES IN THE PORTAL

To use e-services in MISP2, please select a producer, whose services you wish to use, from the producers list and click on its name. The way producers are sorted depends on the configuration of the portal.

Then the system will display all open services from that specific producer.

- [Change Address](#)
- [File download](#)

Choose a service (by clicking on its row) from the list and the system will display its input form (first sub form in the case of complex service). For example:

Search person by Id-code

Personal ID code

Submit

Enter the input data for the service and click on the button „Submit“. The system will execute the service and display the output form

Search person by Id-code

Query id 2310fdf65c9a7259127b498d6705168bd3a20e44

Code	0
Error message	Isukukood 111111111111 ei leitud.

Again

Save...

and saving options (click the 'Save...' button).

Save as file	E-mail <input type="text" value="tom@tom.com"/>
PDF XML	Send as PDF to e-mail

Text field "e-mail"- default value is the same as the one in user settings.

In case of complex service: depending on the complex service logic, the next sub-form will be executed in the complex service according to user input.



3.4 VIEWING SERVICE HISTORY

To view your service history select the tab "Service history". The system will display the service history filter with the following fields: "Between" and "Service name".

Between  - 

Service name

Query id

Description	Query time	Id	Query time	
List of persons	01/25/2013 16:29:42.996	fc60cb968d9d8c05a056a35c8f6cd353e5702a90	0.104	
Isiku andmete otsimine isikukoodi järgi	01/25/2013 16:29:29.656	7a8590f2a8579d90e5d1f6d63ff0b65ecd149bae	0.171	

When the form is displayed, service history of the last month are automatically searched and displayed in a table.