

ArchiveKeeper

User manual

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1. About the manual


1.1 Target group

This manual is aimed at end users of ArchiveKeeper who wish to use this application.

In addition, we recommend an introductory basic training course which, in addition to basic training, which teaches basic concepts as well as how to use the software.

1.2 Definitions

Term	Description
DocSpace	Delimited area in which documents are stored. This area is used to define metadata, deletion period, access rights and revision safety
Metadata	Metadata is structured data that contains comprehensive information about a resource - such as books, web documents, videos or images.
Metadata schema	Schema in which individual metadata is defined. A metadata schema is assigned to a data room. When uploading to this data room, metadata can be filled depending on the valid schema.
Dokument version	Documents cannot be edited (traceability, revision security). However, new versions can be created where a modified/new document has been uploaded or changes have been made to the metadata. Each version is logged and can be traced retrospectively
Retention period	= Deletion period/retention period, period in which a document must be retained (legal requirement). This is defined in ArchiveKeeper at data room level
Revisionsafety	Data or documents are stored and managed in such a way that they remain unchangeable and traceable to ensure reliable verifiability
Delete concept / Delete mode	Differentiation between physical and logical deletion. Individual definition per data room
Logical Delete	A document is not actually deleted, but only made invisible to the user (moved to the recycle bin)
Physical Delete	A document is also deleted from the memory with restrictions. Note: However, deletion only takes place after 2 days, before that it is only marked for deletion and is no longer visible to users. Restriction: Residual data that is stored to ensure audit compliance (applies in audit-compliant data rooms and for metadata that has been defined as audit-compliant)

Symbol	Beschreibung
Info I'm an Information	Information/Hint
Hint I'm a hint/ warning	This symbol indicates important aspects to be considered.
	Indicates a function that is not included in the standard scope and requires an additional licence.

2. Validity

This installation description is valid for the following versions of ArchiveKeeper:

- ArchiveKeeper 2.6

3. Version history

Version	Changes
1.0	Create
2.0	Change for AK Version 2.6.x

4. What is ArchiveKeeper?

ArchiveKeeper is an audit-proof cloud archive. Users can customise their documents with individual metadata and store them in secure data rooms. The documents can be found easily at any time using the metadata and document names. This archive supports users with access management for each data room, compliance with the deletion period, the definition of various deletion options, versioning and much more to ensure audit compliance and easy document management. easy handling of document management.

5. Introduction to audit-proof archiving

The term is based on the understanding of auditing from a business perspective and relates to information and documents that must be retained or are worthy of retention. This means, among other things, that no manipulation is possible, changes are created and logged as new document versions, there is defined role and authorisation management and security standards are adhered to.

The following characteristics therefore apply to audit-proof archives:

- **Completeness:** No document may be lost on its way to the archive.
- **Immutability:** All documents are archived unchanged and generally unalterable. However, changes are possible in the form of new versions being created. Both the current and older versions can be accessed retrospectively.

- **Propriety:** Every document must be stored in accordance with legal and internal organisational guidelines.
- **Retrievability:** All information must be retrievable or retrievable, for example by indexing with metadata.
- **Use only by authorised persons:** All information must be archived in such a way that it can only be viewed by authorised persons.
- **Protection against loss:** Data security must be guaranteed at all times.
- **Observance of retention periods:** A document may only be deleted from the archive once its retention period has expired.
- **Documentation:** Detailed documentation of the archiving process is mandatory, for example to enable the archive to be migrated smoothly.
- **Traceability:** All changes to the archive must be logged so that they can be traced and the original status can be restored.
- **Verifiability:** An audit-proof archive system must be verifiable by a third party expert at any time.

ArchiveKeeper combines revision security with maximum user-friendliness

5.1 Benefits of the ArchiveKeeper

The strength of ArchiveKeeper lies in the wide range of customised configuration options. Admin users can define metadata for the data rooms themselves. Data types, restrictions (selection options), searchability, encryption, mandatory fields, revision security and much more can be customised.

A new metadata schema can also be assigned at a later date (subject to the restriction that the integrity remains intact). Different data rooms can have different metadata schemas and also have different deletion periods. Furthermore, non-audit-proof data rooms can also be created for other documents that are not subject to retention in order to have a central storage location available. No (potentially costly) changes by the software manufacturer are necessary for all of these settings; instead, users can configure the product themselves with regard to metadata and data rooms based on their needs.

Thanks to the cloud solution, employees can access the product from anywhere and the available storage space can be easily changed at a later date.

5.2 Concept

5.2.1 *Funktionen*

- DocSpaces
- Metadata schemes
- Global Permissions: Admin and other individual roles (e.g. Support)
- Groups & Users
- Search
- REST-API and UI

5.2.2 The User interface

Navigation

The individual menu items of ArchivKeeper are listed vertically on the left (foldable navbar). The view differs depending on the assigned authorisations. The different settings can be found under [Permission concept](#)

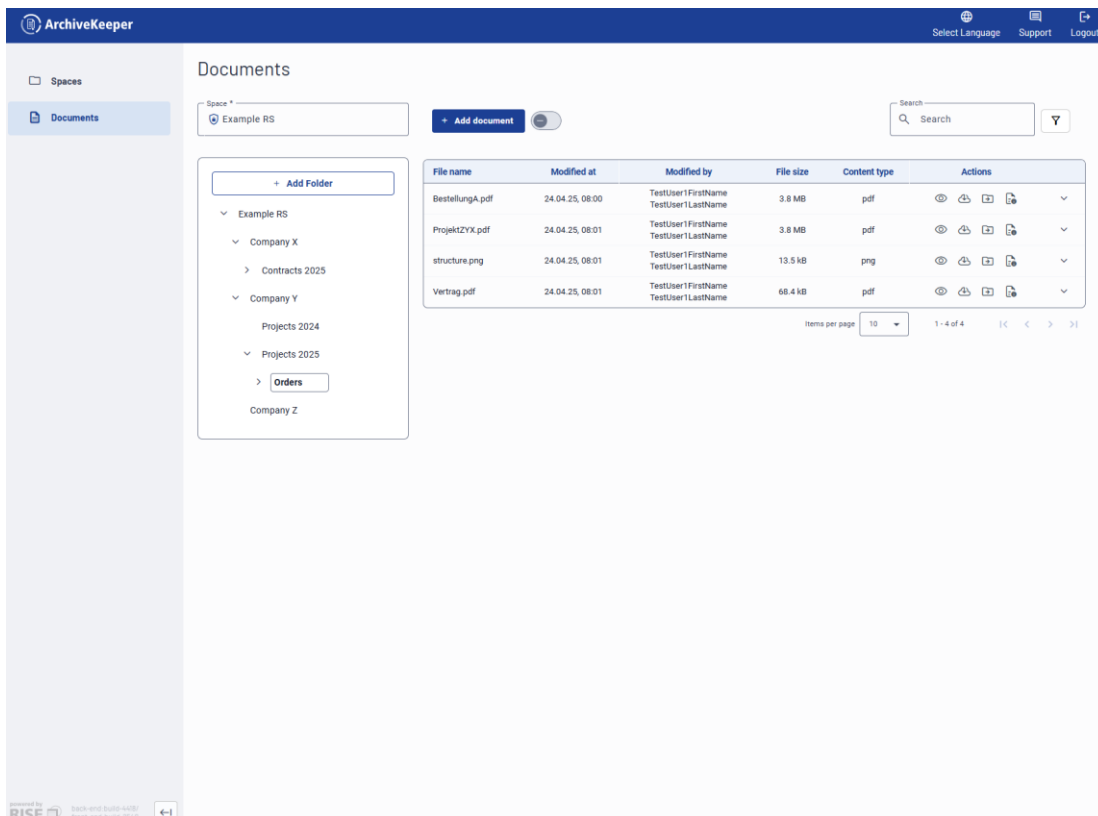
5.2.2.1 Actions on the right top

- Selection of languages
- Support (Requests to archivekeeper-support@rise-world.com)
- Logout

5.2.2.2 View Standard-User

Two areas are available to the standard user (no central authorisations): Start, Data rooms and Documents.

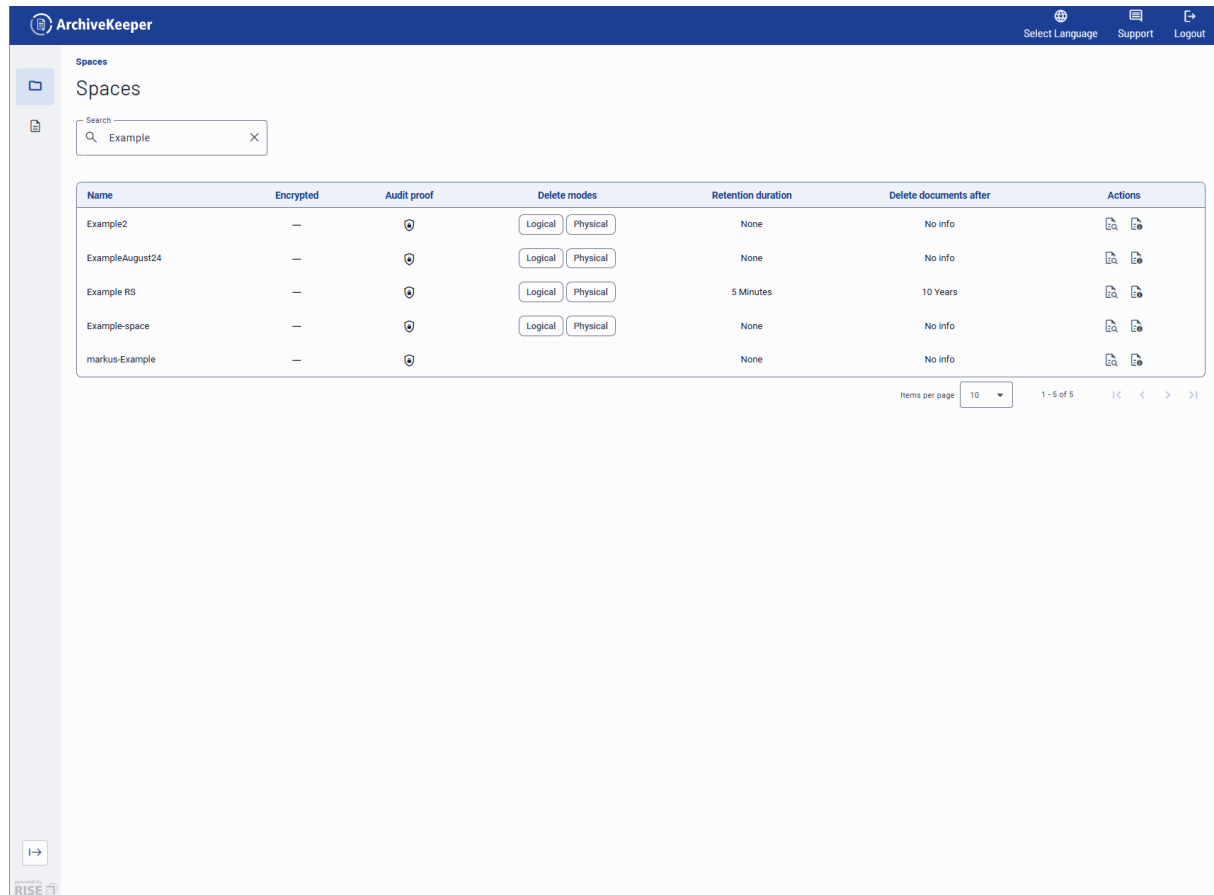
- Data rooms: Overview of all data rooms for which the user is authorised.
 - The user can use Actions to go directly to the documents or to view the data room details
 - In the data room details, the settings that have been defined for the respective data room can be viewed (name, schema, revision security, encryption, deletion concepts, deletion period, etc.).
- Documents : Documents can be viewed, downloaded or deleted here for each authorised data room (depending on the deletion period and deletion concept of the data room).
 - In addition, general document information (including metadata) and the various versions can be called up in the document details.
 - By clicking on the document, the metadata appears as a submenu.



The screenshot shows the ArchivKeeper web application interface. The top navigation bar includes the ArchivKeeper logo, a language selector, support link, and logout button. The left sidebar shows 'Spaces' and 'Documents' tabs. The main content area is titled 'Documents' and shows a search bar and a table of documents. The table has columns for File name, Modified at, Modified by, File size, Content type, and Actions. The table lists four documents: BestellungA.pdf, ProjektZYX.pdf, structure.png, and Vertrag.pdf. The Actions column for each document contains icons for viewing, downloading, and deleting.

File name	Modified at	Modified by	File size	Content type	Actions
BestellungA.pdf	24.04.25, 08:00	TestUser1FirstName TestUser1LastName	3.8 MB	pdf	View Download Delete
ProjektZYX.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	3.8 MB	pdf	View Download Delete
structure.png	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	13.5 kB	png	View Download Delete
Vertrag.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	68.4 kB	pdf	View Download Delete

The navigation bar can be collapsed or expanded using the arrow at the bottom right of the navigation menu to make better use of the screen.



ArchiveKeeper

Select Language Support Logout

Spaces

Search

Q Example X

Name	Encrypted	Audit proof	Delete modes	Retention duration	Delete documents after	Actions
Example2	—	🔒	Logical Physical	None	No info	📄 🗑️
ExampleAugust24	—	🔒	Logical Physical	None	No info	📄 🗑️
Example RS	—	🔒	Logical Physical	5 Minutes	10 Years	📄 🗑️
Example-space	—	🔒	Logical Physical	None	No info	📄 🗑️
markus-Example	—	🔒	Logical Physical	None	No info	📄 🗑️

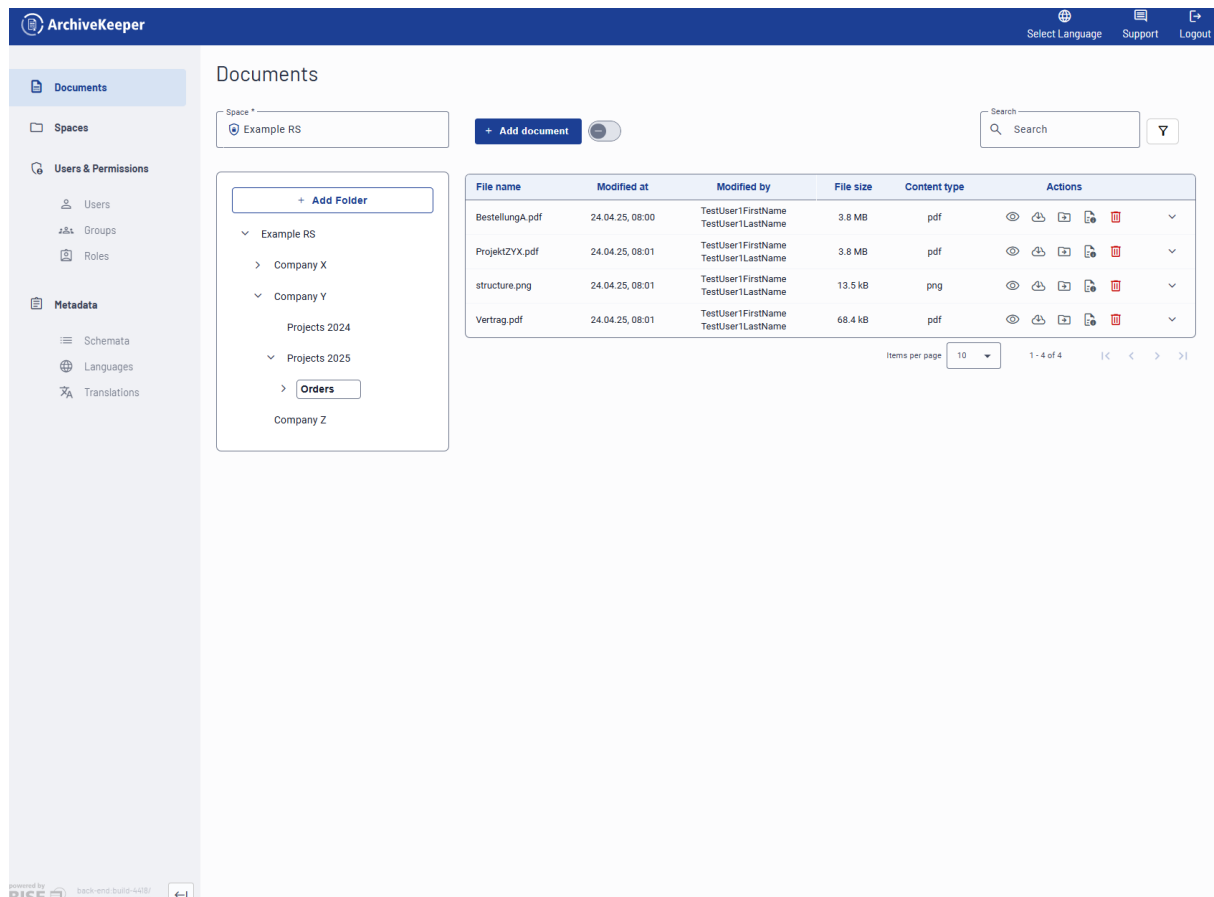
Items per page 10 1 - 5 of 5 |< < > >|

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5.2.2.3 View Admin-User

In addition to documents and DocSpaces, the admin user also has the following administrative areas at their disposal: Users & authorisations with users, groups and roles Data rooms, as well as metadata with schemas, languages and translations for these.

- **DocSpaces:** DocSpaces can be created, edited or deleted with central authorisations, an existing data room can be used as a template for creating a new one
- **Users:** Overview and information on all users, editing, deleting and deactivating individual users, creating new users
- **Groups:** Overview of all groups, group details action, delete groups, create new groups
 - Group details: Overview, add or remove users, change data rooms and the authorisation (read, edit, delete) of users in this data room or define new ones
- **Schemas:** creation of new metadata schemas, deletion of existing schemas, schema details with the individual metadata fields, an existing metadata schema can be used as a template for creating a new one
- **Roles:** Overview of roles (admin, support, etc.), creation of new roles with assignment of central authorisations, deletion of roles (admin is automatically created again) Role details
 - Role details: overview (ID and description), add or remove authorisations



The screenshot displays the ArchiveKeeper web application interface. The top navigation bar includes the ArchiveKeeper logo, a language selector, support link, and a logout button. The left sidebar contains navigation links for Documents, Spaces, Users & Permissions, and Metadata. The main content area is titled 'Documents' and features a search bar, a '+ Add document' button, and a folder tree. The folder tree shows a hierarchy starting with 'Example RS', which contains 'Company X', 'Company Y', 'Projects 2024', 'Projects 2025', 'Orders', and 'Company Z'. A table of documents is displayed, listing files such as 'BestellungA.pdf', 'ProjektZYX.pdf', 'structure.png', and 'Vertrag.pdf' with their respective metadata and action icons. The bottom of the interface shows a footer with 'powered by RISE' and version information.

5.2.3 Permission concept

5.2.3.1 Groups and Users

ArchiveKeeper has groups with assigned users. The users can be created in the administration area. Any number of data rooms can be assigned to each group. The following rights are defined for each data room: read, write, logical deletion, physical deletion and deletion in storage for the respective group.

5.2.3.1.1 Read

If only this right is selected, only read actions are possible. If other actions are selected, the Read permission is also automatically selected.

As soon as a group is assigned to a data room, the Read permission is therefore always assigned as the minimum permission

5.2.3.1.2 Write

This right allows you to add documents and create new versions.

5.2.3.1.3 Logical Delete

Delete right to move files to the recycle bin. Logical deletion is only permitted if this deletion mode has been defined as permitted in the data room.

5.2.3.1.4 Physical Delete

Delete right to permanently delete files. However, this right can only be used to delete files that are no longer within the retention period.

Physical deletion is only permitted if this deletion mode has been defined as permissible in the data room.

5.2.3.1.5 Force Delete

With this deletion right, it is possible to delete files that are still within the retention period. When deleting files, you must also justify why the deletion is being carried out within the retention period; this is documented in the audit logs and is retained even after the document deletion.

However, this is only possible if the physical deletion mode is permitted in the data room.

5.2.3.2 DocSpace access

This concept means that users in a group only have access to certain data rooms (e.g. delimitation of a department or between data rooms that are only relevant for certain professional groups) and only have defined rights for these data rooms. (e.g. group A can only read in data room A1, group B can read, write and delete in data room A1 and can read and write in data room B1)

This concept thus enables the differentiation between various operating sites, organisations, professional groups and hierarchy levels.

5.2.3.3 Roles

A flexible role and authorisation system has been introduced in this application. Roles are specific collections of authorisations that are used to grant certain global access rights.

5.2.3.3.1 Modification of roles

Roles are not fixed, but can be modified. This means:

- **Create:** You can add new roles based on specific authorisation requirements.
- **Update:** You can adjust a role's permissions as needed.
- **Delete:** Roles can be removed (exception Admin role, this always has all permissions and must always remain)

5.2.3.4 Permissions

Permissions are internal authorisations (e.g. DOCSPACE_CREATE - right to create the data room) that apply system-wide and therefore do not relate to individual data rooms. These authorisations are assigned to the corresponding roles.

Selected authorisations with their effect:

- **API_ACCESS**
 - To be able to use ArchiveKeeper, every user must have the API_ACCESS authorisation. This authorisation can be contained in one or more roles, but it must be present.
- **DOCSPACE_SEARCH**
 - Authorisation to search for all DocSpaces available in ArchiveKeeper → Menu item Data rooms is displayed and to view DocSpace details
- **DOCSPACE_CREATE**
 - Create a new DocSpace incl. assignment of a schema
- **DOCSPACE_DELETE**
- **DOCSPACE_UPDATE**
- **DOCSPACE_READ**
 - View Documents of a DocSpace (not downloading)
- **GROUP_SEARCH**
 - Search for all ArchiveKeeper groups → Groups menu item is displayed
- **GROUP_CREATE**
 - Create a group without assigning users and individual docspaces
- **GROUP_DELETE**
- **GROUP_USER_ASSIGN**
 - Assign a group to a user

- **GROUP_USER_UNASSIGN**
 - Unassign a group to a user
- **GROUP_ACL_CREATE**
 - Assign a group to a DocSpace
- **GROUP_ACL_DELETE**
 - Remove a group from a DocSpace
- **USER_CREATE**
- **USER_DELETE**
- **USER_EDIT**
- **USER_SEARCH**
 - Search for all users in ArchiveKeeper → Users menu item is displayed
- **DOCUMENTS_PRUNE**
 - Permanently (physically) delete documents
- **METADATA_SCHEMA_CREATE**
- **METADATA_SCHEMA_SEARCH**
 - View metadata schema details
- **METADATA_SCHEMA_DELETE**
- **BINARY_READ**
 - View document content and download it
- **ROLE_CREATE**
- **ROLE_DELETE**
- **ROLE_UPDATE**
- **ROLE_READ**
 - Read all roles in ArchiveKeeper → menu item Roles is displayed
- **PERMISSION_READ**
 - Read permission details

5.2.3.5 Example role with specific permissions:

A person who is responsible for controlling should have access to all data rooms in the company, but should not be able to upload documents or make changes to metadata schemas or data rooms. This person therefore only receives global read authorisations, e.g: API_ACCESS, DOCSpace_SEARCH, DOCSpace_READ, BINARY_READ. For example, if this person is also assigned to a group that has all group rights in the Controlling data room. This person can perform all actions in this specific data room.

5.2.4 Security

ArchiveKeeper ensures security and encryption using the following methods:

- Transport encryption between all services - data is only transported from and to storage in encrypted form
- A separate key is used per data room for symmetric encryption of the data
- Key management using KMS with SoftwareSecureModule (SSM) backend
- Integration of a rekeying mechanism to always use current and valid algorithms and prevent compromising

5.2.5 Standards

Audit security is based on the specifications of TR-ESOR of the BSI (BSI TR-03125 preservation of evidence of cryptographically signed documents).

5.2.6 *Expandability*

The REST APIs enable integration into other existing systems

Customised offers can be made for adaptations that lie outside the standard configurations.

5.3 Introduction to ArchiveKeeper

5.3.1 *System requirements*

Docker must be installed if you are running it yourself.

Otherwise there is no system requirement as the application is called up via the browser.

5.4 Working with ArchiveKeeper

- Use as a central archiving system with easy-to-find documents
- Use to fulfil requirements according to GoBD (German requirements)
- Use to fulfil other legal requirements (audit security, retention periods)
- Use as file storage for an external system

5.4.1 *Data protection*

Access authorisations and encryption concept prevent unauthorised persons from accessing data

Option to encrypt sensitive data space or encrypt individual metadata (with personal data).

When operated by RISE: Guaranteed by certified data centres in the EU (Austria, Germany).

5.4.2 *Corporate Identity*

The ArchiveKeeper design can be customised to match the company's corporate identity.

The company's colours and logo can be integrated into the ArchiveKeeper interface

5.5 First steps within ArchiveKeeper

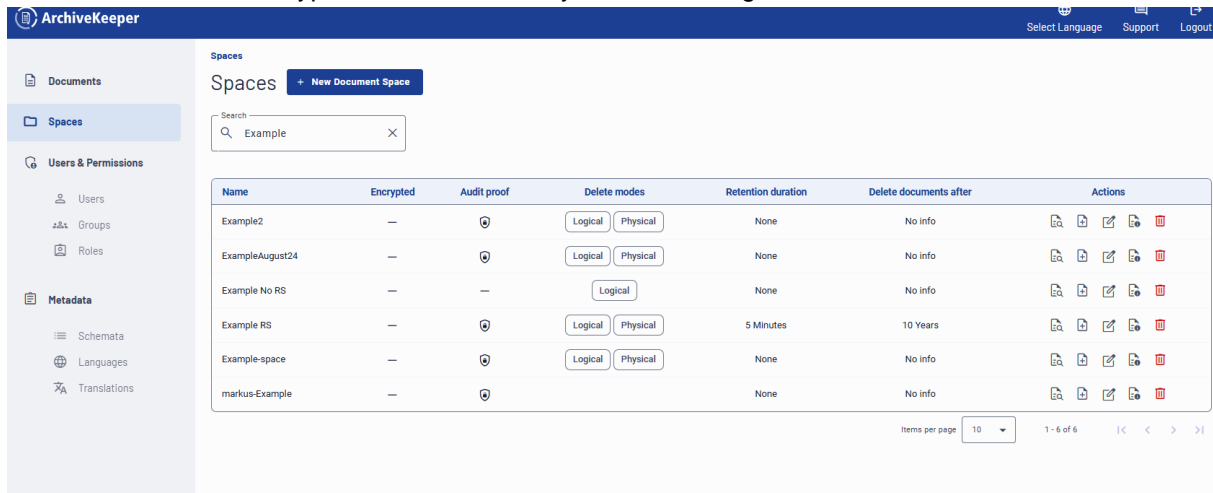
On the following pages you will find detailed documentation on all ArchiveKeeper functions. The successful introduction of ArchiveKeeper in your company is now up to you. Start with training in small teams and organise the introduction step by step without overburdening your colleagues. The enthusiasm of your colleagues will then materialise as expected and guarantee further motivation to use ArchiveKeeper.

6. Section I: Use of ArchiveKeeper

6.1 Basics of DocSpaces and Documents

6.1.1 DocSpace View

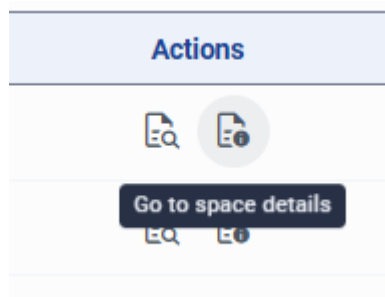
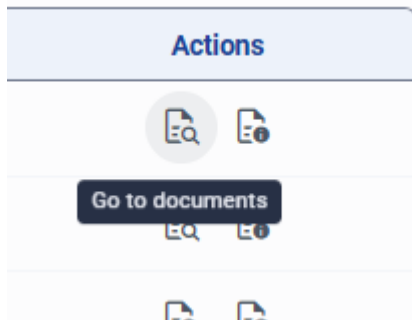
All data rooms assigned to the user can be seen in the Data rooms area. The overview contains basic information such as encryption, revision security, retention obligation, etc.



Name	Encrypted	Audit proof	Delete modes	Retention duration	Delete documents after	Actions
Example2	—	🔒	Logical Physical	None	No info	🔍 📄 📄 📄 📄
ExampleAugust24	—	🔒	Logical Physical	None	No info	🔍 📄 📄 📄 📄
Example No RS	—	—	Logical	None	No info	🔍 📄 📄 📄 📄
Example RS	—	🔒	Logical Physical	5 Minutes	10 Years	🔍 📄 📄 📄 📄
Example-space	—	🔒	Logical Physical	None	No info	🔍 📄 📄 📄 📄
markus-Example	—	🔒		None	No info	🔍 📄 📄 📄 📄

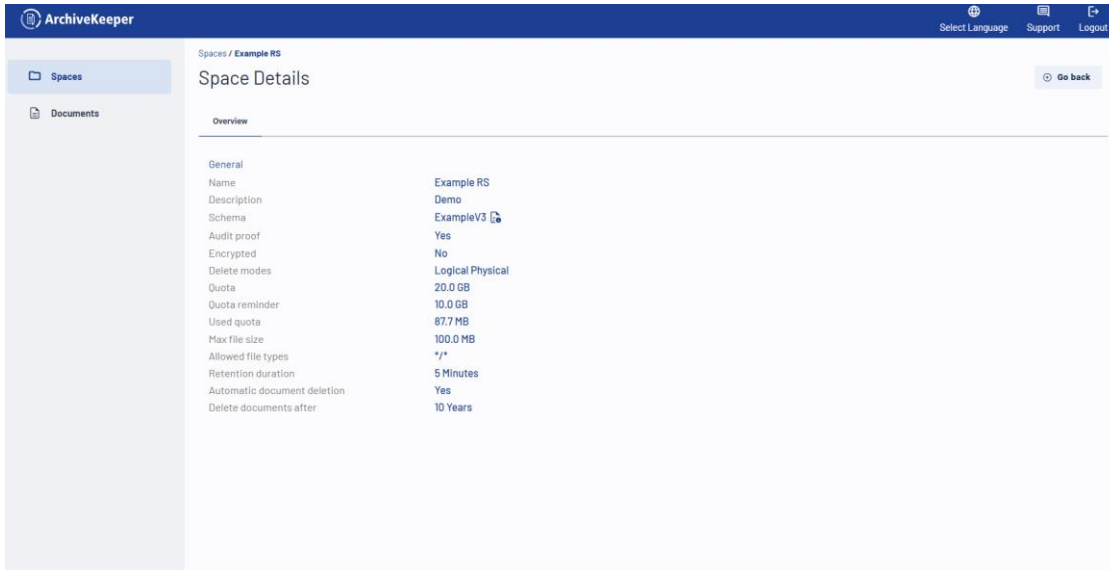
6.1.2 DocSpace interactions standard user

In the data room overview, users without additional authorisation can either go directly to the data room documents or view the data room details.




6.1.3 Datenraumdetails

Further settings for the specific data room can be found in the data room details.



The screenshot shows the 'Space Details' page in the ArchiveKeeper interface. The page has a sidebar with 'Spaces' and 'Documents' tabs. The main content area is titled 'Space Details' and includes a 'Go back' button. Below the title is an 'Overview' section with a table of settings:

General	
Name	Example RS
Description	Demo
Schema	ExampleV3 
Audit proof	Yes
Encrypted	No
Delete modes	Logical Physical
Quota	20.0 GB
Quota reminder	10.0 GB
Used quota	87.7 MB
Max file size	100.0 MB
Allowed file types	*/*
Retention duration	5 Minutes
Automatic document deletion	Yes
Delete documents after	10 Years

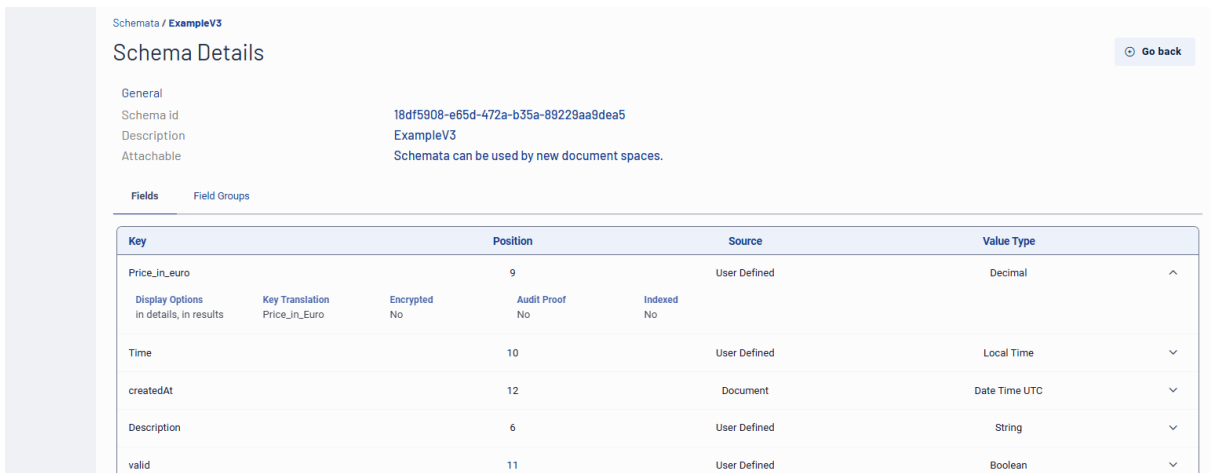
With the global authorisation 'METADATA_SCHEMA_SEARCH', a user can also view the details (fields, basic settings) of the schema.



This is a zoomed-in view of the 'Space Details' page for 'Example RS'. It shows the 'Overview' section with the following details:

- Name:** Example RS
- Description:** Demo
- Schema:** ExampleV3 
- Audit proof:** Yes

There is a 'Go to Schema' button next to the 'Audit proof' value.



The screenshot shows the 'Schema Details' page in the ArchiveKeeper interface for 'ExampleV3'. The page has a sidebar with 'Schemata' and 'Field Groups' tabs. The main content area is titled 'Schema Details' and includes a 'Go back' button. Below the title is a 'General' section with the following details:

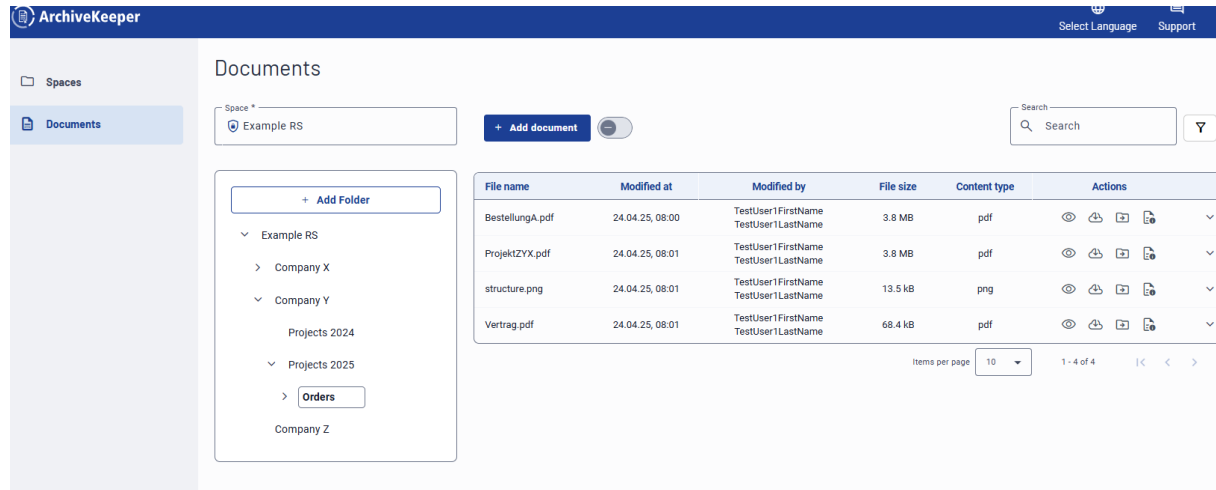
- Schema id:** 18df5908-e65d-472a-b35a-89229aa9dea5
- Description:** ExampleV3
- Attachable:** Schemata can be used by new document spaces.

Below the 'General' section is a 'Fields' section with a table of field details:

Key	Position	Source	Value Type
Price_in_euro	9	User Defined	Decimal
Display Options	Audit Proof	Indexed	
In details, in results	No	No	
Time	10	User Defined	Local Time
createdAt	12	Document	Date Time UTC
Description	6	User Defined	String
valid	11	User Defined	Boolean

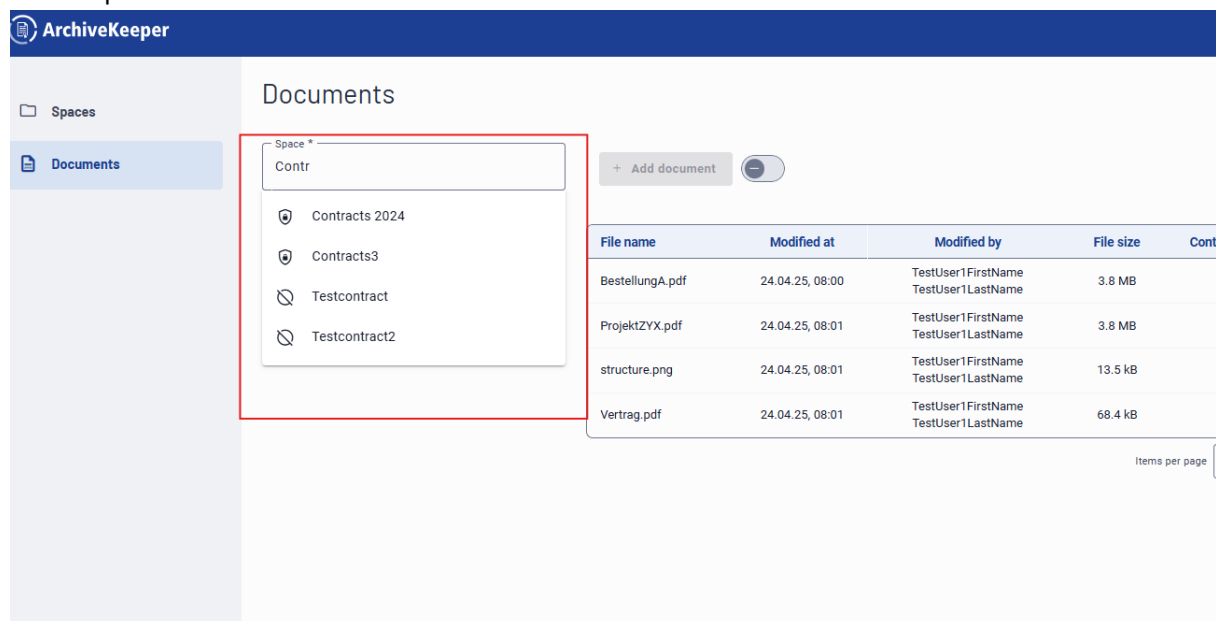
6.1.4 Dokumente

When you click on the data room name or the 'Go to documents' action, the individual documents in the data room appear and others can be stored.



File name	Modified at	Modified by	File size	Content type	Actions
BestellungA.pdf	24.04.25, 08:00	TestUser1FirstName TestUser1LastName	3.8 MB	pdf	
ProjektZYX.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	3.8 MB	pdf	
structure.png	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	13.5 kB	png	
Vertrag.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	68.4 kB	pdf	

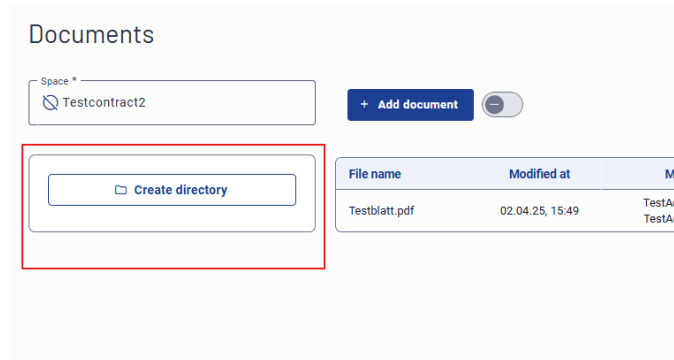
You can also switch directly to other data rooms from this page. To do this, select the desired data room in the top left-hand corner.



File name	Modified at	Modified by	File size	Content type
BestellungA.pdf	24.04.25, 08:00	TestUser1FirstName TestUser1LastName	3.8 MB	pdf
ProjektZYX.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	3.8 MB	pdf
structure.png	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	13.5 kB	png
Vertrag.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	68.4 kB	pdf

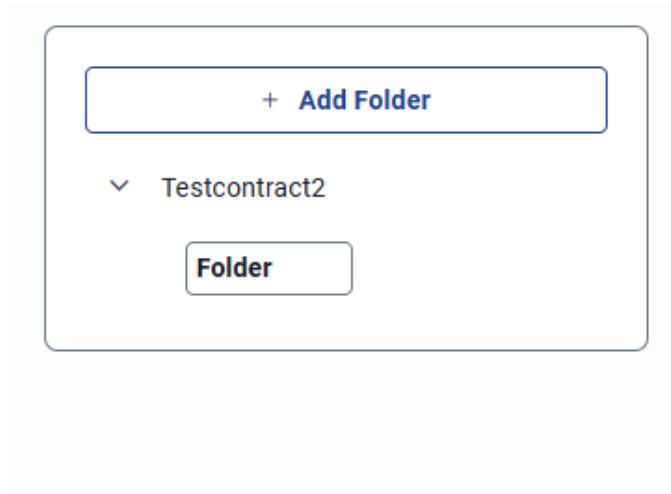
6.1.5 Folders

Folders can be created for better structuring. To do this, first create a directory.

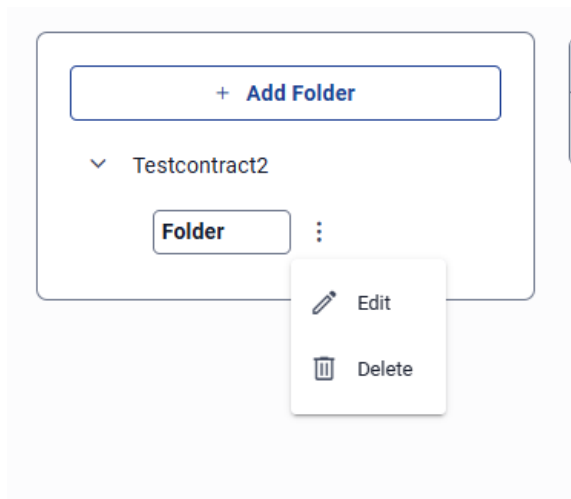


File name	Modified at	Modified by
Testblatt.pdf	02.04.25, 15:49	TestAc TestAc

Folders can then be created.



The three dots on the left of the folder can be used to edit or delete it. You can also change the name of the folder.



6.1.6 Document upload

Files can be uploaded to the selected data room using the 'Add document' button.

Basic configurations, such as retention period, possible file types, etc., are regulated via the data room.

Documents

Space * Example RS

+ Add document

Search

+ Add Folder

File name	Modified at	Modified by	File size	Content type	Actions
BestellungA.pdf	24.04.25, 08:00	TestUser1FirstName TestUser1LastName	3.8 MB	pdf	
		TestUser1FirstName	3.8 MB	pdf	
			13.5 kB	png	
			68.4 kB	pdf	

Items per page 10 1 - 4 of 4

Example RS

Company X

Company Y

Projects 2024

Projects 2025

Orders

Company Z

Space Example RS

File * Drop file or click to select

Folder Orders

Category * Usermanual

Attributes Select an option Enter the value

Field Groups Company

Customer ID

Date of receipt

Department

Description

Expiration Date

Save Cancel

The file can be dragged and dropped in or selected directly from the file system. In addition to the file, the individual metadata can be filled in. Mandatory fields are marked with an asterisk. Optional metadata fields can be selected and filled in under Characteristics.

Field groups are special metadata fields. For example, a time period can be defined here. One possible use case would be to define the validity of a document. In the search, you would then enter a date in the 'Validity' field and all documents that are valid on this date would be displayed.

+ Add Folder

File name	Modified at	Modified by	File size
BestellungA.pdf	24.04.25, 08:00	TestUser1FirstName	3.8 MB
			3.8 MB
			13.5 kB
			68.4 kB

Items per page

Example RS

Company X

Company Y

Projects 2024

Projects 2025

Orders

Company Z

Space Example RS

File * Drop file or click to select

Folder Orders

Category * Usermanual

Attributes Select an option Enter the value

Field Groups Validity

fromDD* 15.04.2025


toDD 18.04.2025

Save Cancel

The schemas are defined individually and assigned to the data rooms. The upload screen and the possible metadata therefore look different depending on the schema of the data room.

Add Document


File *

OrderABC.pdf 


Folder


Orders


Category *

Information 

Attributes


Customer ID 


1 112 


valid 


☒ Yes


☐ No





Department 


PR 





Price in euro 




98.23 

Date of receipt 


01.04.2025 





Description 

Demo   


Field Groups

Validity 




fromDD* 

15.04.2025

toDD 

30.06.2026

 Save

Cancel

File size

3.8 MB

3.8 MB

13.5 kB

68.4 kB

Items

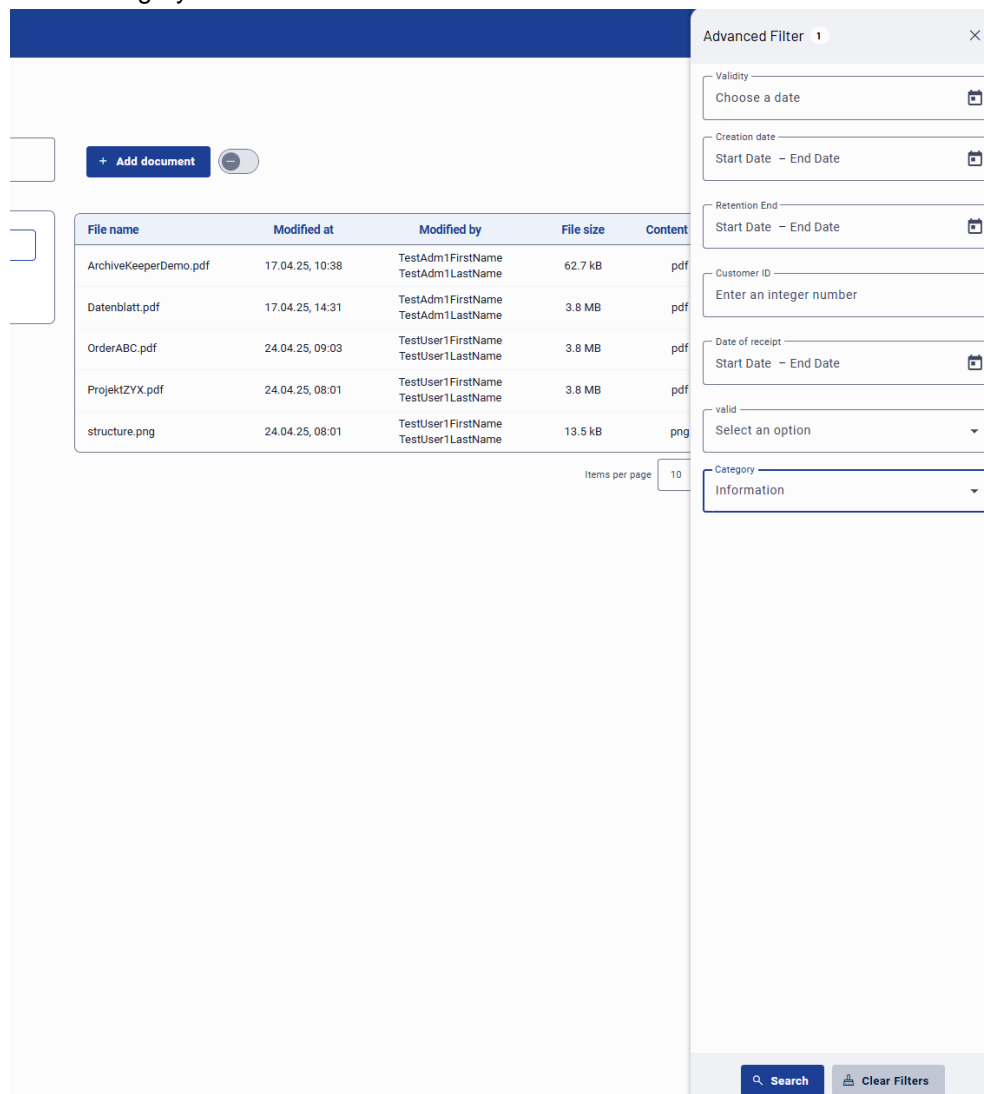
To the right of the characteristics, you can use the symbols to add more (plus), remove the respective field (minus) or delete only the content (eraser symbol) of the current field.

6.1.7 Document search

The search and filter function can be used to find relevant documents and information more quickly in the data room.

The view of the search and filter mask and the searchable metadata depend on the metadata schema of the data room and therefore differ from that shown in the image. What is included in the full-text search is also defined in the schema.

In the images shown below, the 'Category' metadata field is filtered first. Two documents can be found in this category.



File name	Modified at	Modified by	File size	Content
ArchiveKeeperDemo.pdf	17.04.25, 10:38	TestAdm1FirstName TestAdm1LastName	62.7 kB	pdf
Datenblatt.pdf	17.04.25, 14:31	TestAdm1FirstName TestAdm1LastName	3.8 MB	pdf
OrderABC.pdf	24.04.25, 09:03	TestUser1FirstName TestUser1LastName	3.8 MB	pdf
ProjektZYX.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	3.8 MB	pdf
structure.png	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	13.5 kB	png

Items per page: 10

Advanced Filter 1

Validity: Choose a date

Creation date: Start Date - End Date

Retention End: Start Date - End Date

Customer ID: Enter an integer number

Date of receipt: Start Date - End Date

valid: Select an option

Category: Information

Search Clear Filters

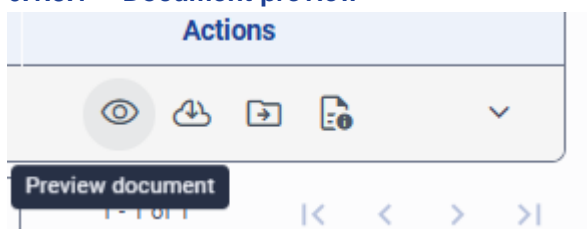
The search is then refined by entering the text 'Proje' in the general search field. This will display the document that contains the term 'Proje' in the file name. This image also shows that clicking on the respective line of the document displays the assigned metadata.

+ Add document		Search <input type="text" value="Proje"/>			
File name	Modified at	Modified by	File size	Content type	Actions
ProjektZYX.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	3.8 MB	pdf	
Items per page <input type="text" value="10"/> 1 - 1 of 1					

6.1.8 Document actions

Various actions are available to the user for each document

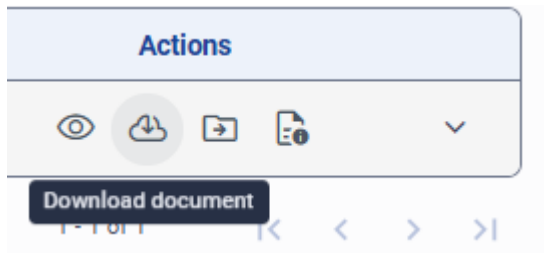
6.1.8.1 Document preview



Documents can be viewed here in advance (without downloading). The view is noted in the version log. However, the preview function is not available for all file formats.

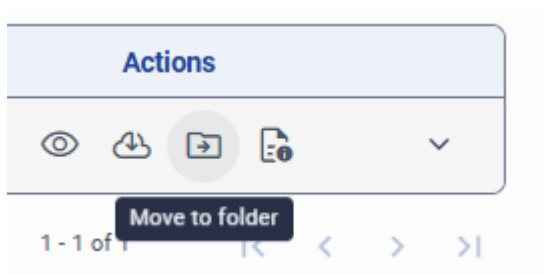
Documents			
Preview: ProjektZYX.pdf			
ID	Name	Status	Notiz
213523	Muster	OK	Abgeschlossen
56435435	Testname	Offen	Fehleranalyse
654643	Name	Offen	Rechnungsbearbeitung
535325	Mustername	Abgelehnt	Fehlende Unterlagen
755885	Muster	OK	Abgeschlossen
-4725654	Testname	Offen	Fehleranalyse
-1E+07	Name	Offen	Rechnungsbearbeitung
-1,6E+07	Mustername	Abgelehnt	Fehlende Unterlagen
-2,1E+07	Muster	OK	Abgeschlossen
-2,7E+07	Testname	Offen	Fehleranalyse
-3,2E+07	Name	Offen	Rechnungsbearbeitung
-3,8E+07	Mustername	Abgelehnt	Fehlende Unterlagen
-4,3E+07	Muster	OK	Abgeschlossen
-4,9E+07	Testname	Offen	Fehleranalyse
-5,4E+07	Name	Offen	Rechnungsbearbeitung
-6E+07	Mustername	Abgelehnt	Fehlende Unterlagen
-6,5E+07	Muster	OK	Abgeschlossen
-7,1E+07	Testname	Offen	Fehleranalyse
-7,6E+07	Name	Offen	Rechnungsbearbeitung
-8,1E+07	Mustername	Abgelehnt	Fehlende Unterlagen
-8,7E+07	Muster	OK	Abgeschlossen
-9,2E+07	Testname	Offen	Fehleranalyse
-9,8E+07	Name	Offen	Rechnungsbearbeitung
-1E+08	Mustername	Abgelehnt	Fehlende Unterlagen
-1,1E+08	Muster	OK	Abgeschlossen
-1,1E+08	Testname	Offen	Fehleranalyse
-1,2E+08	Name	Offen	Rechnungsbearbeitung
-1,3E+08	Mustername	Abgelehnt	Fehlende Unterlagen
-1,3E+08	Muster	OK	Abgeschlossen
-1,4E+08	Testname	Offen	Fehleranalyse
-1,4E+08	Name	Offen	Rechnungsbearbeitung
-1,5E+08	Mustername	Abgelehnt	Fehlende Unterlagen
-1,5E+08	Muster	OK	Abgeschlossen
-1,6E+08	Testname	Offen	Fehleranalyse
-1,6E+08	Name	Offen	Rechnungsbearbeitung
-1,7E+08	Mustername	Abgelehnt	Fehlende Unterlagen
-1,7E+08	Muster	OK	Abgeschlossen
-1,8E+08	Testname	Offen	Fehleranalyse
-1,9E+08	Name	Offen	Rechnungsbearbeitung
-1,9E+08	Mustername	Abgelehnt	Fehlende Unterlagen
-2E+08	Muster	OK	Abgeschlossen
-2E+08	Testname	Offen	Fehleranalyse
-2,1E+08	Name	Offen	Rechnungsbearbeitung
-2,1E+08	Mustername	Abgelehnt	Fehlende Unterlagen
-2,2E+08	Muster	OK	Abgeschlossen
-2,2E+08	Testname	Offen	Fehleranalyse
-2,3E+08	Name	Offen	Rechnungsbearbeitung
-2,3E+08	Mustername	Abgelehnt	Fehlende Unterlagen
-2,4E+08	Muster	OK	Abgeschlossen

6.1.8.2 Download of documents



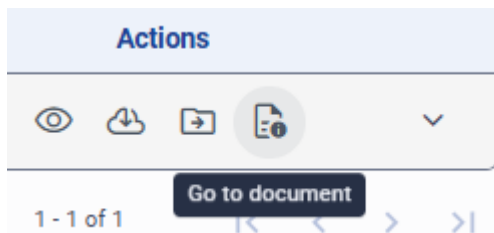
Documents are saved to the local device with this action. This action is also noted in the version log.

6.1.8.3 Move document to another folder



The document can be moved to another folder here

6.1.8.4 Document details



Further information on the document and the individual versions can be requested here.

Documents (Example RS) / ProjektZYX.pdf

Document Details

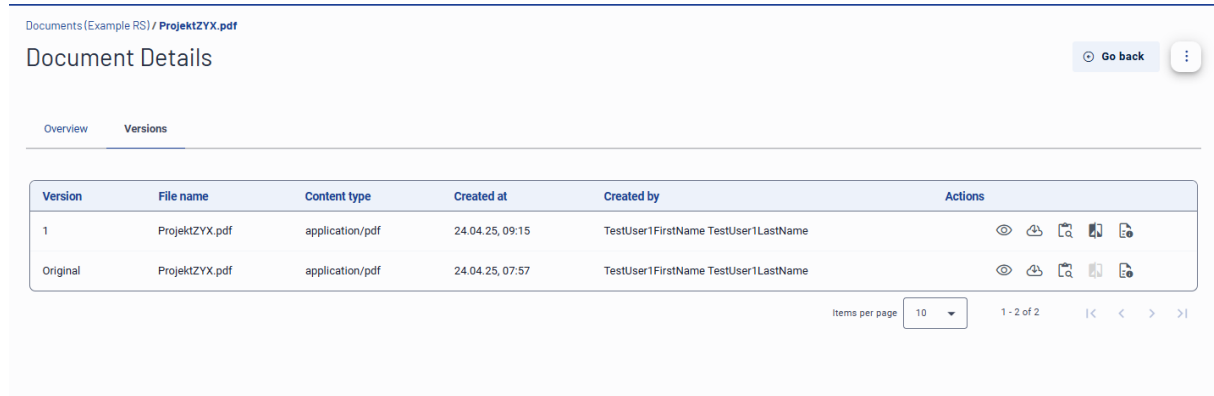
Go back

Overview Versions

General	
Space	Example RS
Folder	Orders
Created by	TestUser1FirstName TestUser1LastName
Modified by	TestUser1FirstName TestUser1LastName
Modified at	24.04.25, 08:01
Retention end	24.04.25, 08:02
File size	3.8 MB
Content type	application/pdf
Automatic deletion at	24.04.35, 07:57
Automatic deletion	Yes
Attributes	
Category	Info
Price in euro	11222.23
valid	Yes
Validity	2025-04-08 - 2025-04-30

All metadata can be seen in the document details overview. General metadata refers to standard data such as file name, creation date, etc. This data is saved with every file.

Characteristics are the metadata defined in the metadata schema.













Documents (Example RS) / ProjektZYX.pdf

Document Details

[Go back](#)

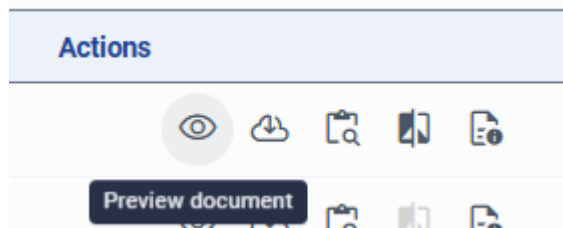
[Overview](#) [Versions](#)

Version	File name	Content type	Created at	Created by	Actions
1	ProjektZYX.pdf	application/pdf	24.04.25, 09:15	TestUser1FirstName TestUser1LastName	    
Original	ProjektZYX.pdf	application/pdf	24.04.25, 07:57	TestUser1FirstName TestUser1LastName	    






Items per page: 10 1 - 2 of 2 |< < > >|

The individual versions are shown in the Versions tab and actions are possible for each version.






6.1.8.4.1 Preview



Actions

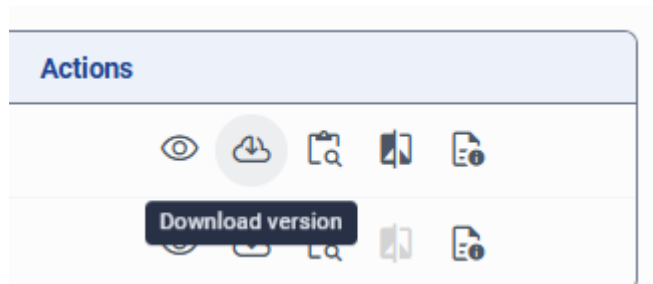
    

Preview document






    

As in the general document view, the content of the selected version is displayed here as a preview.






6.1.8.4.2 Download



Actions

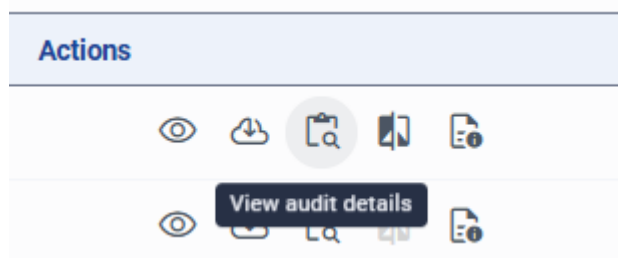
    

Download version






    

As in the general document view, the file of the selected version is also downloaded here.






6.1.8.4.3 Protocol



Actions

View audit details

Audit Logs - Version: 1

Time	Type	User
24.04.25, 09:15	Created	TestUser1FirstName TestUser1LastName
24.04.25, 09:17	Viewed	TestUser1FirstName TestUser1LastName
24.04.25, 09:18	Viewed	TestUser1FirstName TestUser1LastName

Items per page: 10 1 - 3 of 3

Close

The version log contains all changes and actions of the selected version

6.1.8.4.4 Change history

Actions

Icons: Eye, Cloud, Search, Split, Document, Change History

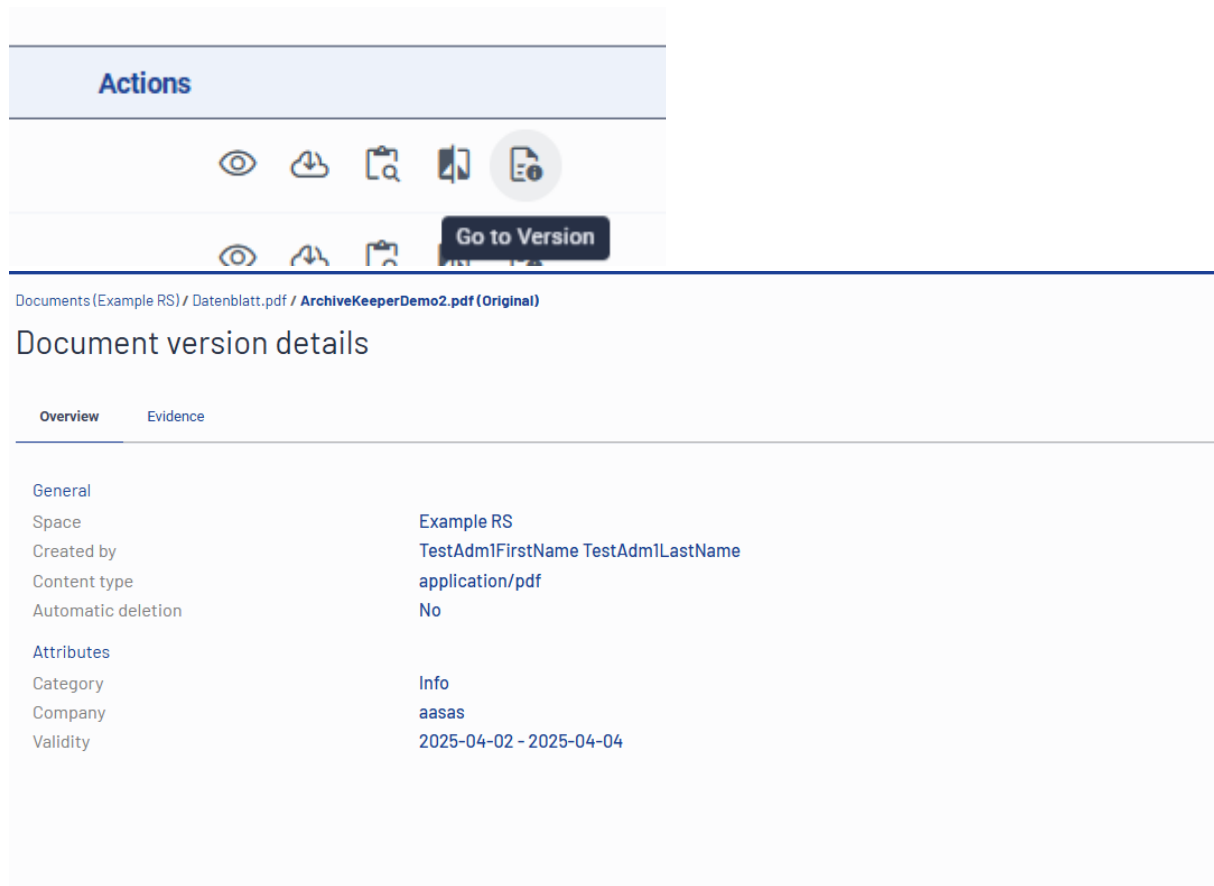
Version comparison

	v.1	v.2
Department	—	PR
File name	ProjektZYX.pdf	OrderABC.pdf
Price_in_euro	11222.23	—

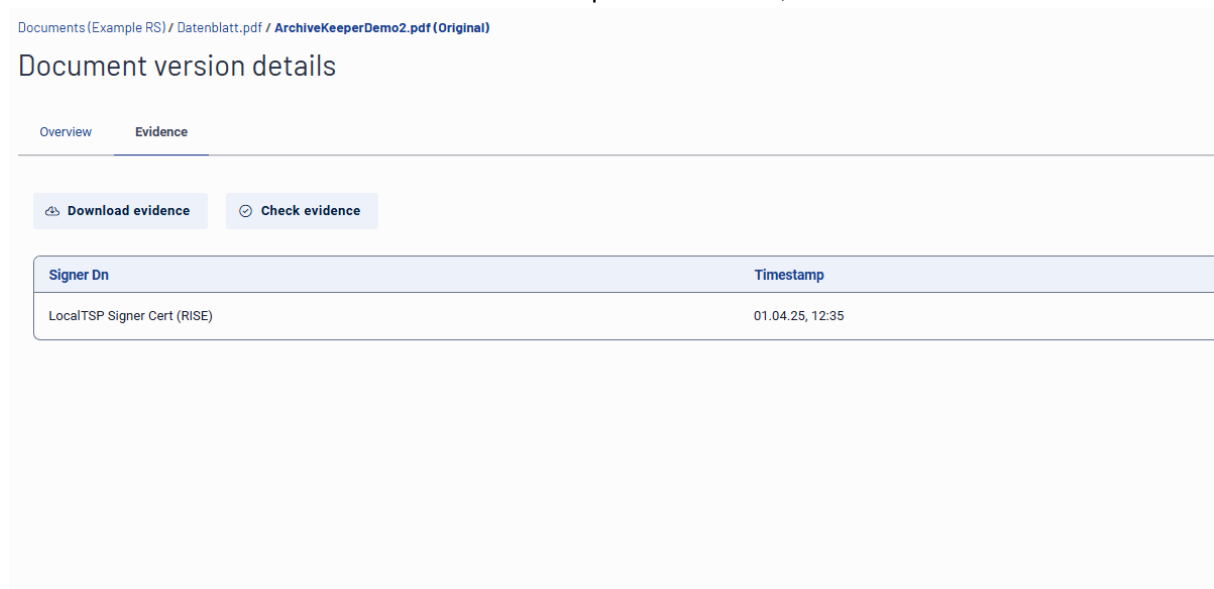
Close

The change overview shows which attributes have changed or whether another document has been uploaded.

6.1.8.4.5 Version details



Clicking on 'Continue to version' takes you to the detailed information for the selected version. The general and schema-specific metadata can be seen here in the Overview tab. For documents that have been stored in an audit-proof data room, there is also the Evidence tab.



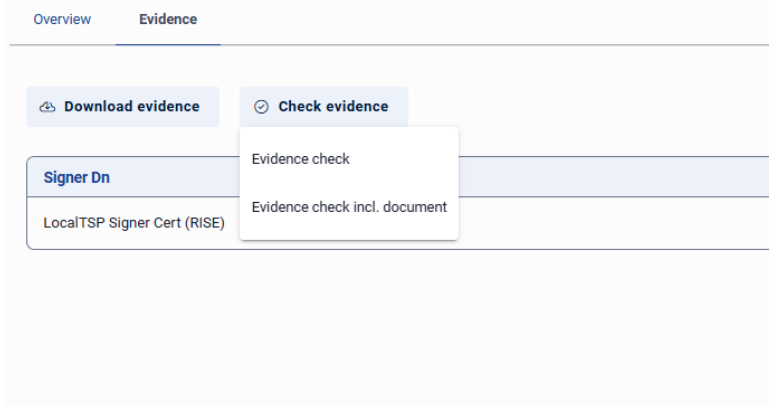
The signature can be checked here. The overview shows the name of the signature and the timestamp with which the revision was signed.

The time of this time stamp does not correspond to the time of creation, as documents are sent collectively to the time stamp service.
By default, the time stamp is generated max. 2 hours after creation.ge.

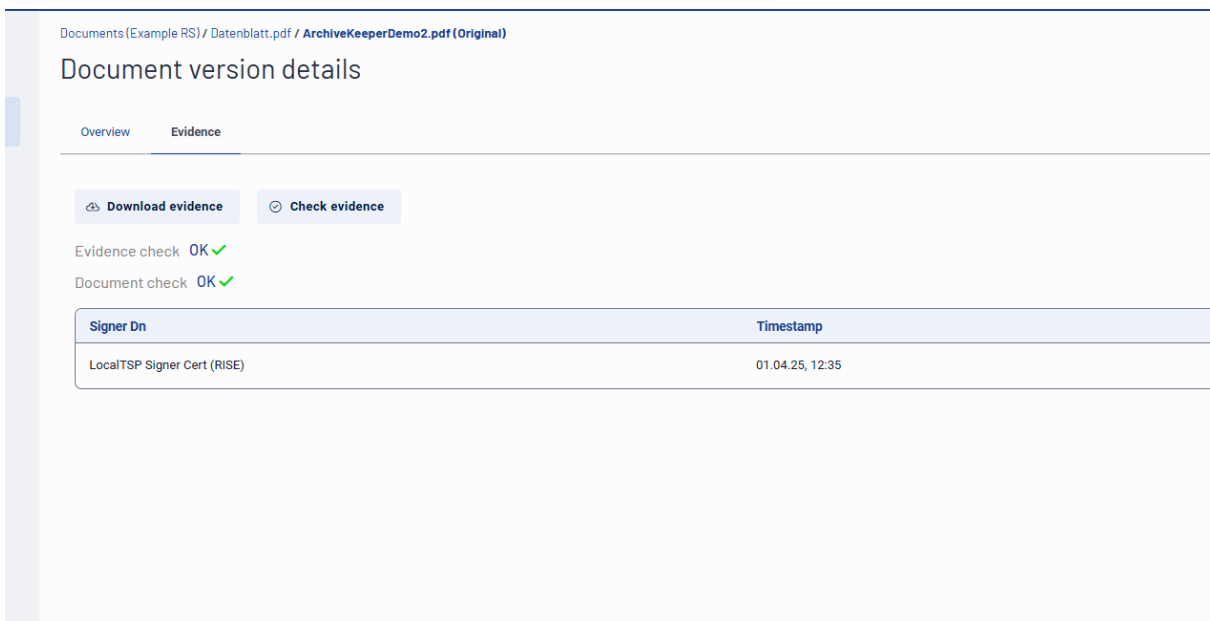
The download button can be used to download an XML file containing more detailed information on the revision evidence.

A direct integrity check can be carried out via 'Check evidence'.

Document version details



Signer Dn
LocalTSP Signer Cert (RISE)



Documents (Example RS) / Datenblatt.pdf / ArchiveKeeperDemo2.pdf (Original)

Document version details

Overview Evidence

[Download evidence](#) [Check evidence](#)

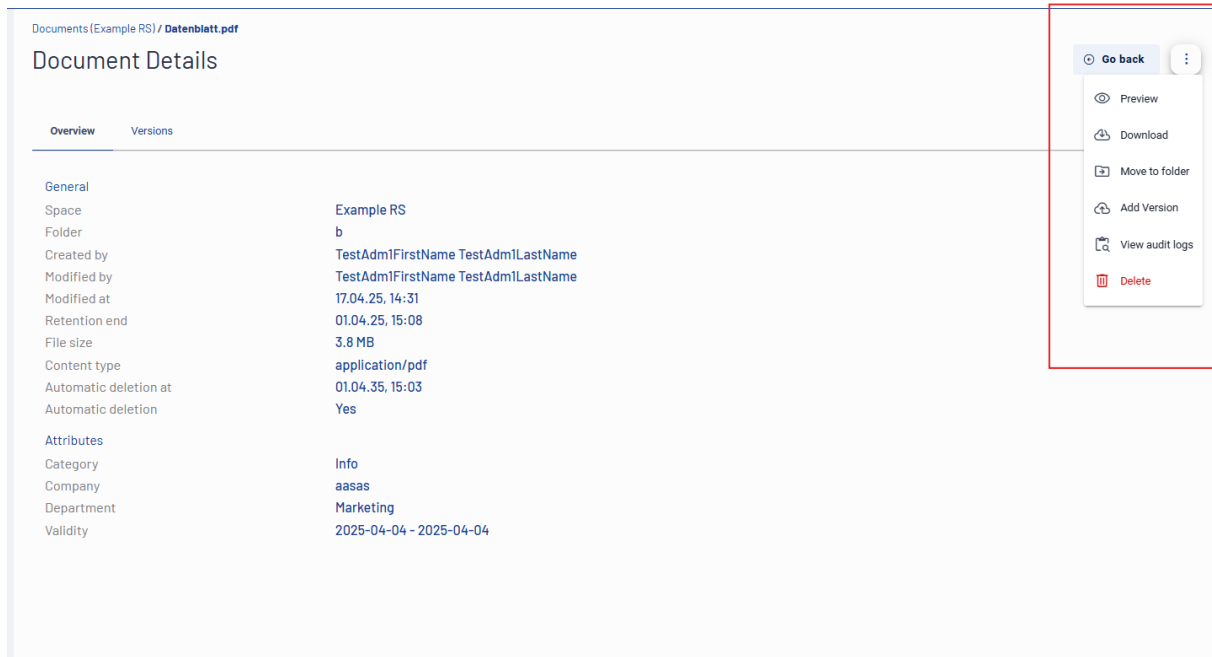
Evidence check **OK** ✓

Document check **OK** ✓

Signer Dn	Timestamp
LocalTSP Signer Cert (RISE)	01.04.25, 12:35

After the check, 'OK' or 'Not OK' is used to indicate whether the timestamp signature and the hashed content are consistent and have therefore not been manipulated.

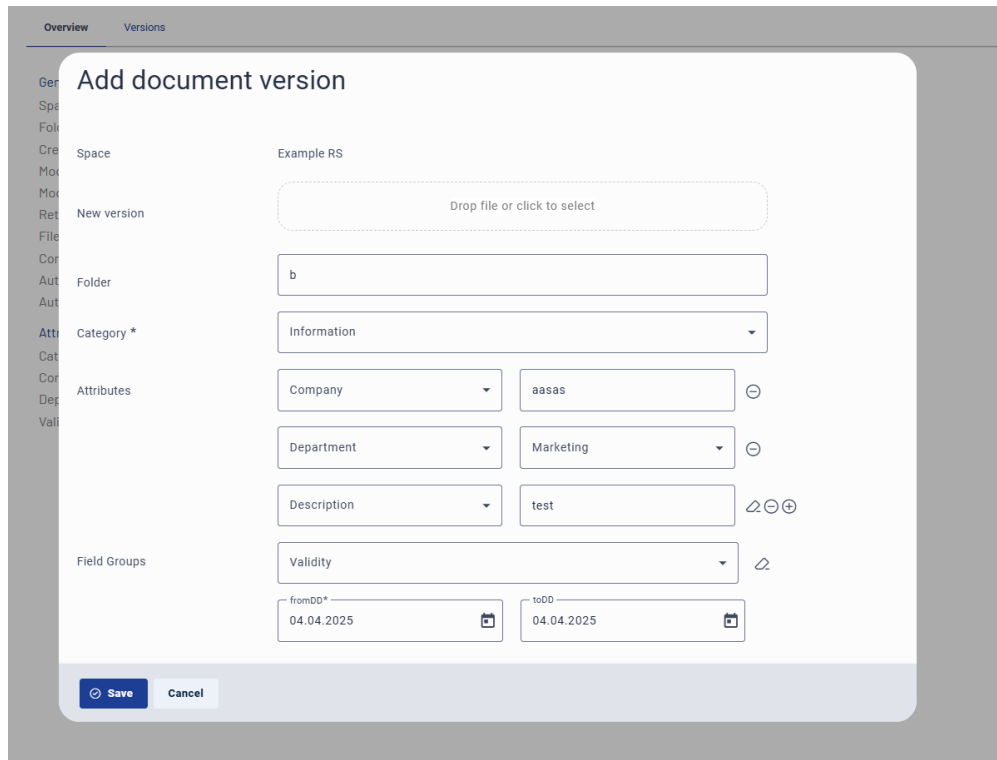
6.1.8.4.6 Further actions of document details



Various actions are also possible in the document detail view. These can be selected by clicking on the three dots in the top right-hand corner and selecting the desired action.

The following actions are possible here:

- Preview: As in the general document view, the content of the current version is displayed here as a preview.
- Download: As in the general document view, the file of the current version is also downloaded here.
- Move document to another folder
- Add new version
 - This action can be used to save a new file or new, modified metadata as a new version of the document.
 - If no new document is uploaded and only the metadata is changed, the stored document also remains valid for the new version. It is therefore not necessary to upload the same document again if only metadata is to be changed



The screenshot shows a web application interface with a sidebar on the left containing various document management actions like 'Ger...', 'Spe...', 'Fol...', 'Cre...', 'Mod...', 'Ret...', 'File...', 'Cor...', 'Aut...', 'Att...', 'Cat...', 'Dep...', and 'Vali...'. The main area is titled 'Add document version' and contains the following fields:

- Space:** Example RS
- New version:** A dashed box with the text 'Drop file or click to select'.
- Folder:** A text input field containing the letter 'b'.
- Category *:** A dropdown menu currently showing 'Information'.
- Attributes:** A group of fields including:
 - 'Company' dropdown and 'aasas' text input.
 - 'Department' dropdown and 'Marketing' dropdown.
 - 'Description' dropdown and 'test' text input.
- Field Groups:** A dropdown menu currently showing 'Validity'.
- Validity:** Two date pickers labeled 'fromDD*' and 'toDD', both set to '04.04.2025'.

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

If a new version is stored, the deletion period applies from the creation date of the new version. Example: Document A was filed 9 years and 11 months ago and the deletion period is 10 years, so it would be possible to delete the document in one month. A new file is now uploaded (via the 'Add new version' action). The document can now only be physically deleted after 10 years from the current date.

- Version log: The version log contains all changes and actions of all document versions

b

Audit Logs - All

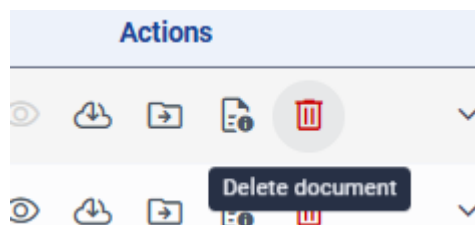
Time	Type	User
01.04.25, 10:12	Created	TestAdm1FirstName TestAdm1LastName
01.04.25, 15:02	Viewed	TestAdm1FirstName TestAdm1LastName
01.04.25, 15:02	Created	TestAdm1FirstName TestAdm1LastName
01.04.25, 15:03	Created	TestAdm1FirstName TestAdm1LastName
17.04.25, 14:28	Created	TestAdm1FirstName TestAdm1LastName
17.04.25, 14:30	Created	TestAdm1FirstName TestAdm1LastName
17.04.25, 14:31	Created	TestAdm1FirstName TestAdm1LastName

Items per page 10 1 - 7 of 7 < >

Close

- Delete: Here, as in the general document view, you can delete a document (with all versions)
For more information, see [Delete Document](#)

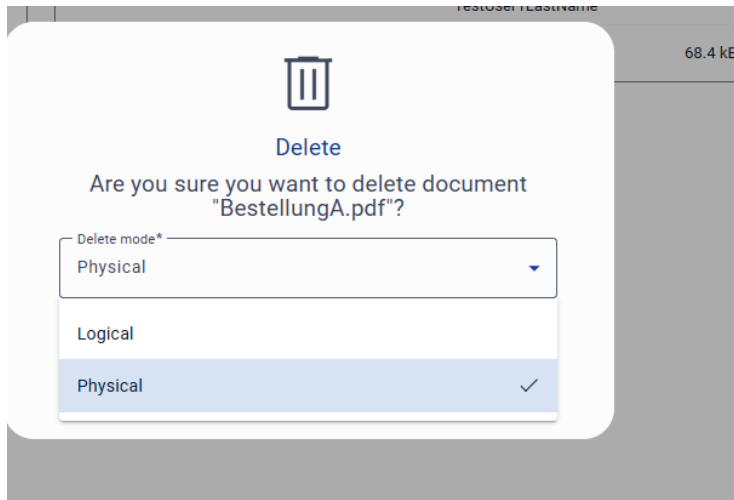
6.1.8.5 Delete document



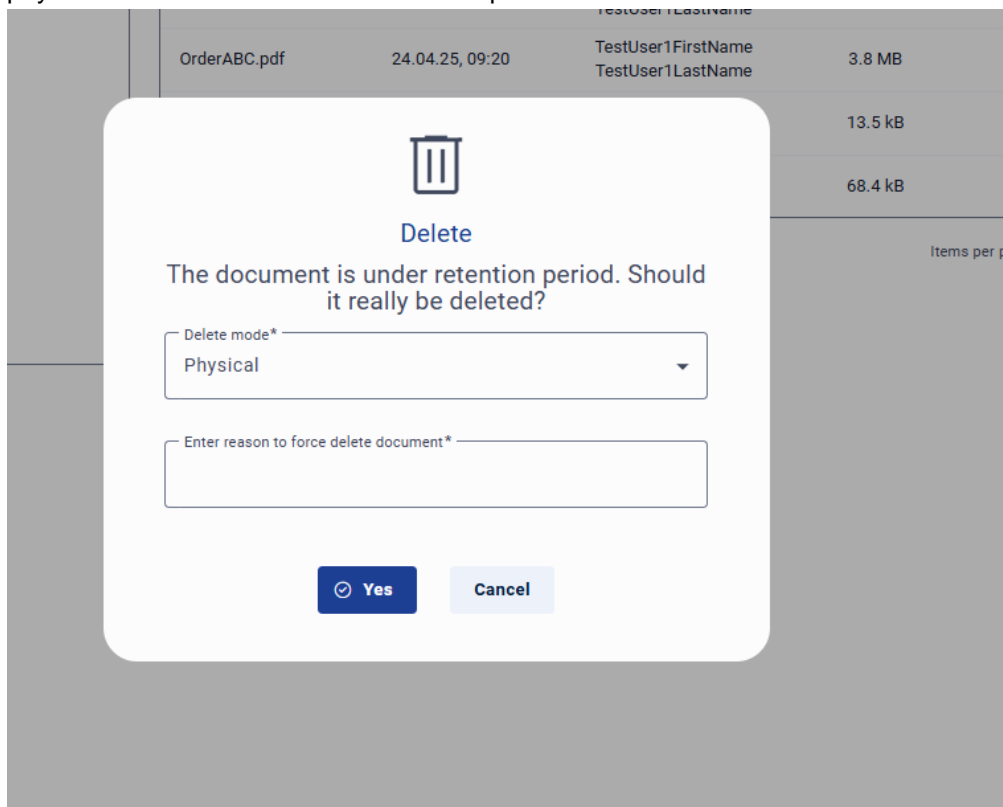
This action cannot be used to delete a document. The deletion mode used is defined in the data room.

- If only logical deletion is possible in the data room, the document is moved to the recycle bin.
- If only physical deletion is possible in the data room, the document is physically deleted. Relevant residual data for ensuring audit compliance is retained. In addition, deletion within the system only takes place after a time limit has expired (2 days)

- If both deletion modes are defined in the data room (logical and physical). When clicking on the 'Delete document' action, a pop-up window appears in which the desired mode can be selected.

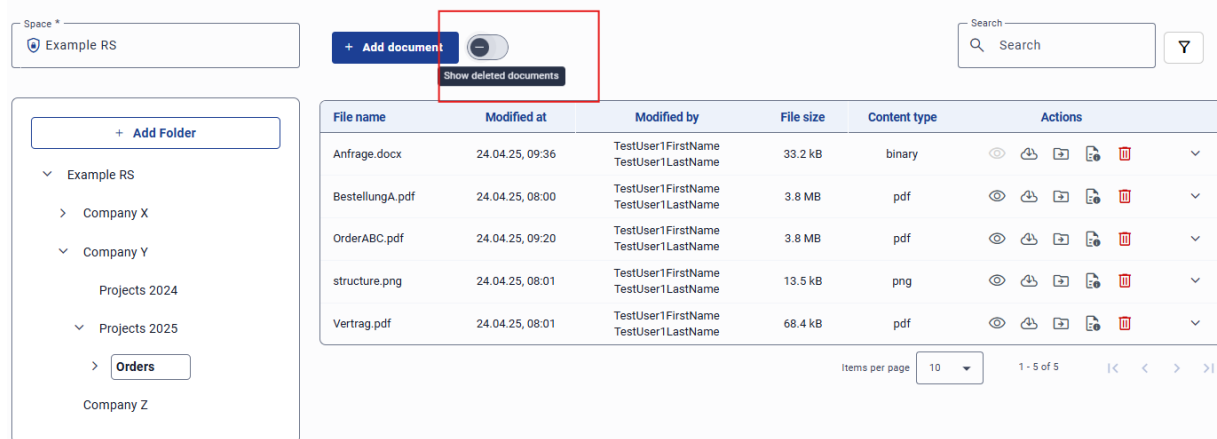


If the retention period of the document is still valid, a user also needs the 'Delete in retention' right for physical deletion and a reason must be specified.



6.1.9 Recycle bin

Documents



Space *
Example RS

+ Add document ☐ Show deleted documents

Search
Q Search Y

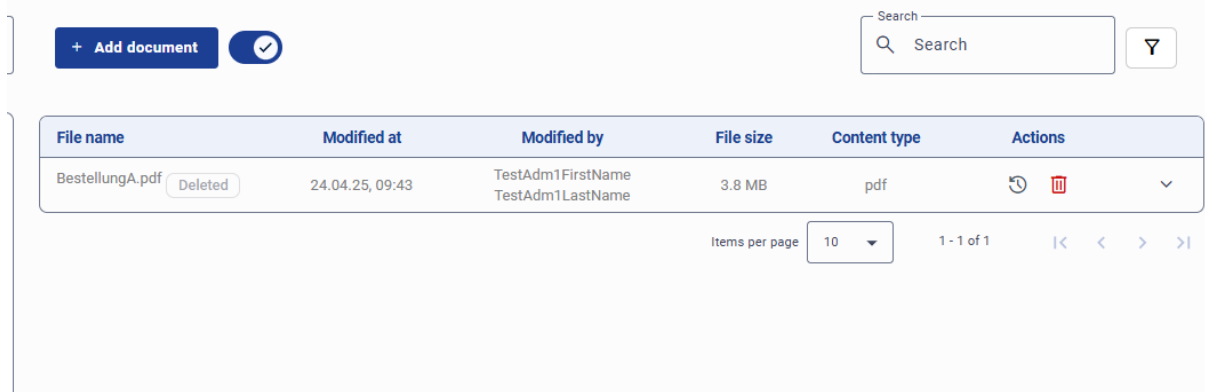
+ Add Folder

- Example RS
 - Company X
 - Company Y
 - Projects 2024
 - Projects 2025
 - Orders
 - Company Z

File name	Modified at	Modified by	File size	Content type	Actions
Anfrage.docx	24.04.25, 09:36	TestUser1FirstName TestUser1LastName	33.2 kB	binary	
BestellungA.pdf	24.04.25, 08:00	TestUser1FirstName TestUser1LastName	3.8 MB	pdf	
OrderABC.pdf	24.04.25, 09:20	TestUser1FirstName TestUser1LastName	3.8 MB	pdf	
structure.png	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	13.5 kB	png	
Vertrag.pdf	24.04.25, 08:01	TestUser1FirstName TestUser1LastName	68.4 kB	pdf	

Items per page 10 1 - 5 of 5

The 'Show deleted' button takes you to the recycle bin. All logically deleted documents are displayed here.



+ Add document ☒

Search
Q Search Y

File name	Modified at	Modified by	File size	Content type	Actions
BestellungA.pdf Deleted	24.04.25, 09:43	TestAdm1FirstName TestAdm1LastName	3.8 MB	pdf	

Items per page 10 1 - 1 of 1

The deleted documents can also be restored from the recycle bin.

6.2 Administration

6.2.1 The DocSpace

Data rooms can be viewed, edited, created and deleted in the Data rooms area.

Deletion is only possible if no groups have been assigned to the data room. Attention Default groups that are automatically assigned must be removed before deletion.

Only users with the appropriate central authorisations can make changes to data rooms.

Spaces

Spaces [+ New Document Space](#)

Search

Name	Encrypted	Audit proof	Delete modes	Retention duration	Delete documents after	Actions
Example2	—		Logical Physical	None	No info	
ExampleAugust24	—		Logical Physical	None	No info	
Example No RS	—	—	Logical	None	No info	
Example RS	—		Logical Physical	5 Minutes	10 Years	
Example-space	—		Logical Physical	None	No info	
markus-Example	—			None	No info	

Items per page 10 1 - 6 of 6 < >

6.2.1.1 Create DocSpace

A DocSpace can be created from scratch (New data room button) or an existing one can be used as a template (icon under Actions).

Prerequisite: a suitable metadata schema has been created beforehand.

A few settings can be made when creating a data room.

The name of the data room must be unique. Entering a description can be very useful, as the description is included when searching for data rooms.

This means that the data room 'X1234' with the description 'Accounting for location 1' is also found with 'Location 1'.

Previously created metadata schemas can be selected for the schema. If encryption is provided for certain metadata in the schema, the data room must also be encrypted.

For further details on schema creation, see [Metadata Schema](#)

Create Space

Name *

Description

Audit proof ☒

Delete modes ☐ Logical ☐ Physical

Encrypted ☐

Retention duration

Years	Months	Weeks	Days	Hours	Minutes	Seconds
0	0	0	0	0	0	0

Schema *

Max file size

Quota

Quota reminder

Allowed file types

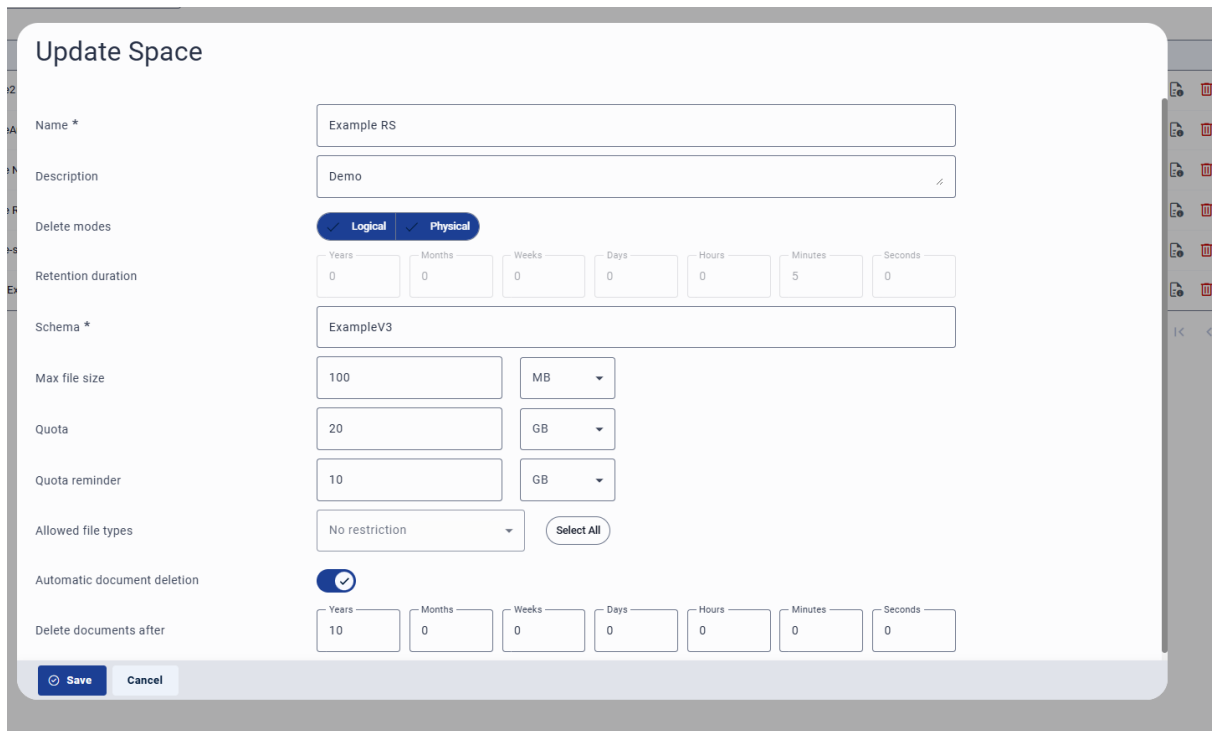
Automatic document deletion ☐

Delete documents after

Years	Months	Weeks	Days	Hours	Minutes	Seconds
0	0	0	0	0	0	0

6.2.1.2 Edit DocSpace

Example RS	—	<input checked="" type="radio"/> Logical <input type="radio"/> Physical	5 Minutes	10 Years	<input type="button" value="Edit space"/> <input type="button" value="Info"/> <input type="button" value="Delete"/>
Example RS	—	<input type="radio"/> Logical <input checked="" type="radio"/> Physical	5 Minutes	10 Years	<input type="button" value="Edit space"/> <input type="button" value="Info"/> <input type="button" value="Delete"/>



Update Space

Name *

Description

Delete modes ☒ Logical ☒ Physical

Retention duration
 Years Months Weeks Days Hours Minutes Seconds

Schema *

Max file size

Quota

Quota reminder

Allowed file types

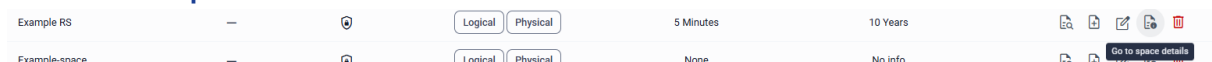
Automatic document deletion ☒

Delete documents after
 Years Months Weeks Days Hours Minutes Seconds

The data room settings can generally be changed at a later date, but the following restrictions apply:

- The deletion period cannot be changed retrospectively in order to maintain traceability.
- It is also not possible to change the revision security, as this would enable manipulation.
- Changing the schema is also only possible to a limited extent, as all previous metadata must also be available in the new schema.
 - With the new schema, changes can only be made to the display settings for metadata that was also contained in the previous schema
 - There are no restrictions for metadata that was not contained in the schema already in use.
 - The exact procedure for this can be found under [Metadata schema](#)

6.2.1.3 DocSpace Details



Example RS	—		Logical Physical	5 Minutes	10 Years	
Example-Name	—		Logical Physical	None	No info	Go to space details

The view of the data room details in the administration differs from that of the standard user.

In the overview, you can switch directly to the metadata schema details of the schema used.

Further actions are available in the details via the dots in the top right-hand corner.


There is also the 'Groups' tab where the assigned groups can be managed.

Spaces / **Example RS**

Space Details

Go back

Overview Groups

General	
Name	Example RS
Description	Demo
Schema	ExampleV3 
Audit proof	Yes
Encrypted	No
Delete modes	Logical Physical
Quota	20.0 GB
Quota reminder	10.0 GB
Used quota	95.4 MB
Max file size	100.0 MB
Allowed file types	*/*
Retention duration	5 Minutes
Automatic document deletion	Yes
Delete documents after	10 Years

6.2.1.3.1 Groups

Spaces / **Example RS**





Space Details

Go back

Overview Groups

Group *
Contract-Group

Permissions **Read** Write Logical Delete Physical Delete Force Delete + Add user group

Group	Read	Write	Logical Delete	Physical Delete	Force Delete	Actions
DemoAdmin	✓	✓	✓	✓	✓	 
IT	✓	✓	✗	✗	✗	 

Items per page 10 1 - 2 of 2 << < > >>

The Groups tab of the data room details contains all groups and their rights. New groups can be added or existing groups can be edited or deleted using actions.

To manage the groups, see: [Groups](#)



6.2.1.3.1.1 Add group

In the Group field, you can search for the corresponding group (which has not yet been assigned to the data room).



The specific rights can be assigned by deselecting and selecting.

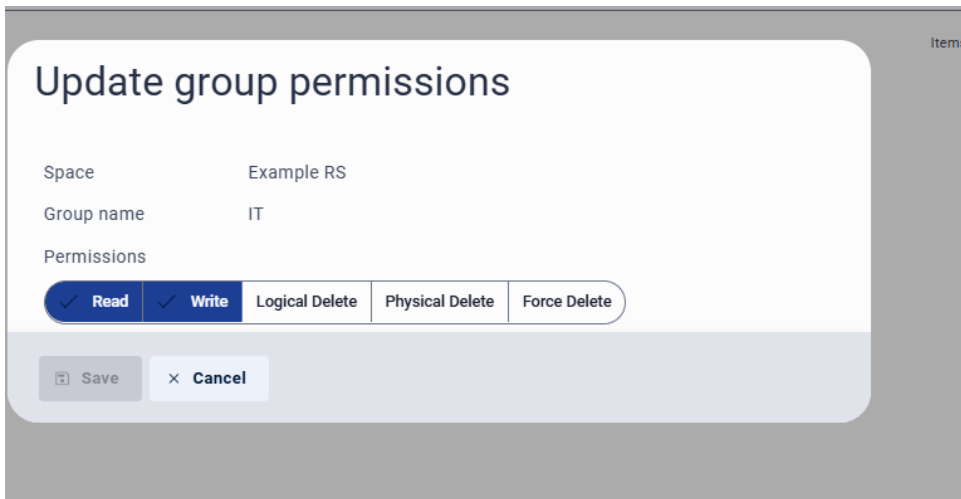
6.2.1.3.1.2 Edit group

Actions

Edit Group Permissions



Update group permissions

Space: Example RS

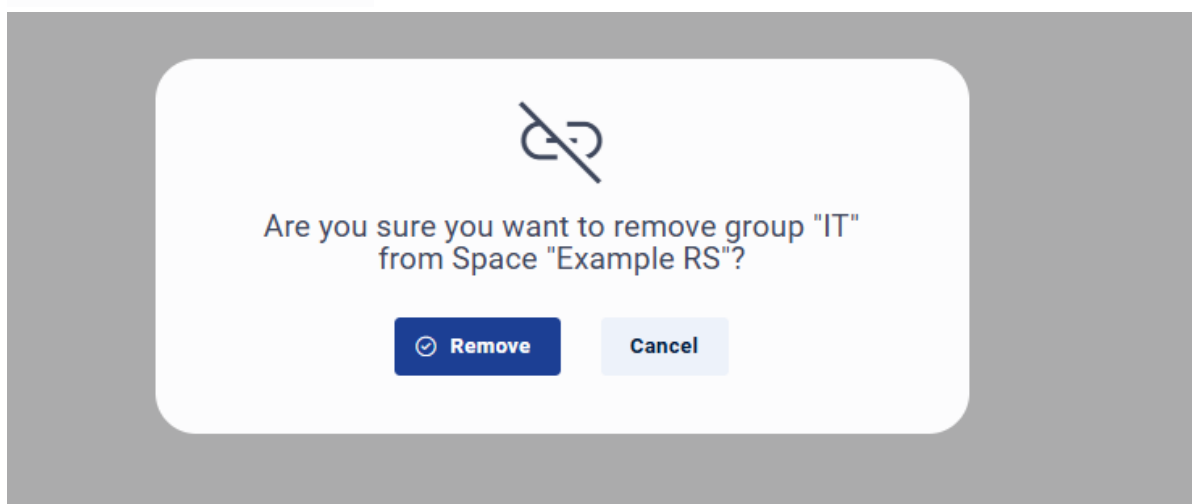
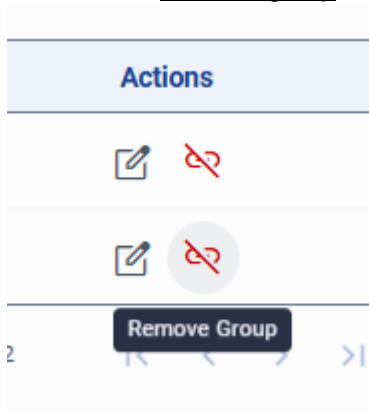
Group name: IT

Permissions:

☒ Read
 ☒ Write
 ☐ Logical Delete
 ☐ Physical Delete
 ☐ Force Delete

The rights can be adjusted in the 'Edit group rights' pop-up by selecting/deselecting them.

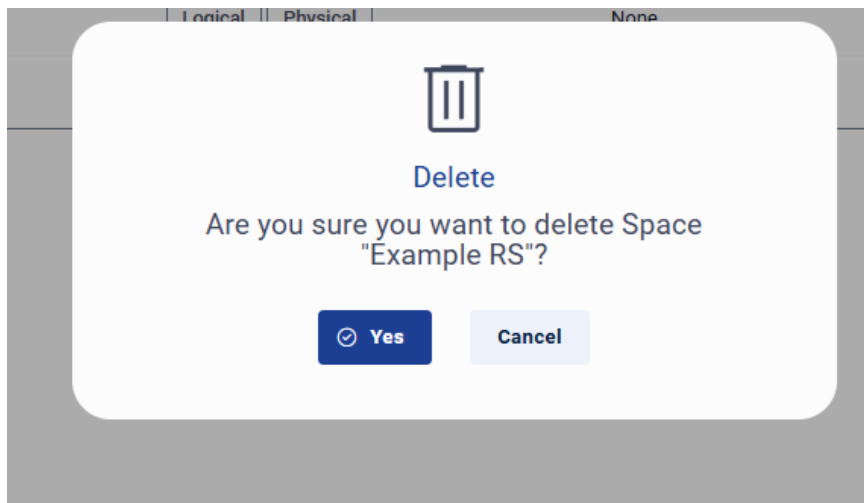
6.2.1.3.1.3 Remove group



Groups can be removed from the data room using the 'Remove group' action. When removing a group, an additional pop-up appears to confirm the action.

6.2.1.4 Datenraum löschen

Example RS	—	Q	Logical Physical	5 Minutes	10 Years	<input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Delete space"/>
Example-space	—	Q	Logical Physical	None	No Info	<input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Delete space"/>



DocSpaces can only be deleted if no groups are assigned to the docSpace. If you want to delete a data room, the assigned groups must therefore be removed first. When deleting the data room, a distinction is made depending on whether the data room is audit-proof or not.

6.2.1.4.1 Non revisionsafety DocSpace

The data room is initially only 'deleted' and the contents of the data room can still be viewed during this time.

After 2 days, the storage is deleted. All files in the storage, documents, revisions and audit logs are deleted. Only the data room object itself is not deleted, but is set to the status 'Deleted'.

Name	Encrypted	Audit proof	Delete modes	Retention duration	Delete documents after	Actions
Example2 Deleted	—		Logical Physical	None	No info	   

This non-auditable data room is marked for deletion.

6.2.1.4.2 Revisionsafe DocSpace

Works in the same way as deleting a non-auditable data room. However, the evidence and reduced daily hashes of the data room (or its revisions) are also physically deleted here. In addition, all reduced revisions (insensitive remnants from the physical deletion) are also removed

6.2.2 The Metadata schema
















Schemata

Schemata

+ Add Schema

Search

×

Schema id	Description	Attachable	Actions
6bc08638-d22e-4bc3-b4cc-84456ad7bfd9	Example	Yes	  
2fa801c1-6772-4310-a3a8-f7595aac486e	ExampleV2	Yes	  
18df5908-e65d-472a-b35a-89229aa9dea5	ExampleV3	Yes	  
7aaa4e1c-693a-4a11-bacf-36dc03e76849	ExampleV5	Yes	  
18f90fb5-41a8-462c-8771-5bc45ef5d3e5	ExampleVV4	Yes	  

Items per page

10

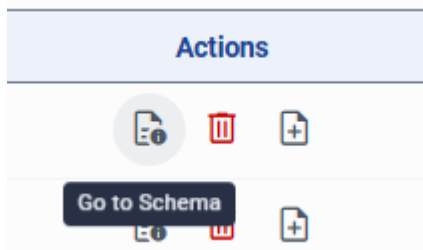
1 - 5 of 5

<

>

The entire schemas can be managed under Metadata schema.

6.2.2.1 Schema details



You can access the detailed information of a scheme via the actions.

Schemata / ExampleV2

Schema Details

[Go back](#)

General

Schema id: 2fa801c1-6772-4310-a3a8-f7595aac486e

Description: ExampleV2

Attachable: Schemata can be used by new document spaces.

Fields Field Groups

Key	Position	Source	Value Type	Actions
valid	11	User Defined	Boolean	
Date_of_receipt	4	User Defined	Local Date	
retentionEnd	13	Document	Date Time UTC	
Category	0	User Defined	String	
Time	10	User Defined	Local Time	
Department	2	User Defined	String	
Expiration	5	User Defined	Date Time UTC	
createdAt	12	Document	Date Time UTC	
filename	1	Document	String	
Customer_ID	8	User Defined	Integer	
Price_in_euro	9	User Defined	Decimal	
fromDD	14	User Defined	Local Date	
Description	6	User Defined	String	
toDD	15	User Defined	Local Date	
Company	7	User Defined	String	
Info	3	User Defined	String	

Attachable schema

'Attachable' for a schema means that it can be added to new DocSpaces. This can be activated at any time if required

The individual schema fields and their settings can be seen in the detailed view.

Schema Details

General

Schema id: 2fa801c1-6772-4310-a3a8-f7595aac486e

Description: ExampleV2

Attachable: Schemata can be used by new document spaces.

Fields Field Groups

Key	Position	Value Type
valid	11	Boolean
Date_of_receipt	4	Local Date
retentionEnd	13	Date Time UTC
Category	0	String
Time	10	Local Time
Department	2	String
Expiration	5	Date Time UTC
createdAt	12	Date Time UTC
filename	1	String
Customer_ID	8	Integer
Price_in_euro	9	Decimal
fromDD	14	Local Date
Description	6	String
toDD	15	Local Date

Edit field

Key: valid

Key Translation: Choose Translation Center +

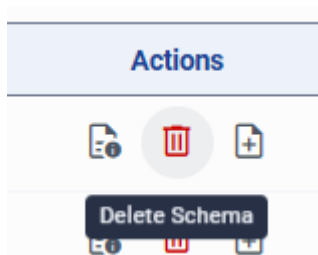
Constraints: [dropdown]

Display Options:

- In details page: ☒
- In search results: ☒
- Filterable: ☒
- Search by text: ☐

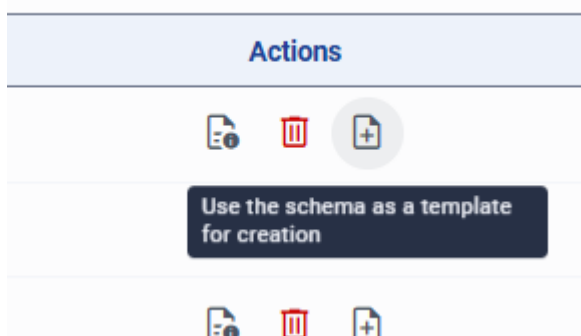
Save Cancel

The translations and settings for displaying the individual fields can be edited. Other setting changes are not possible.



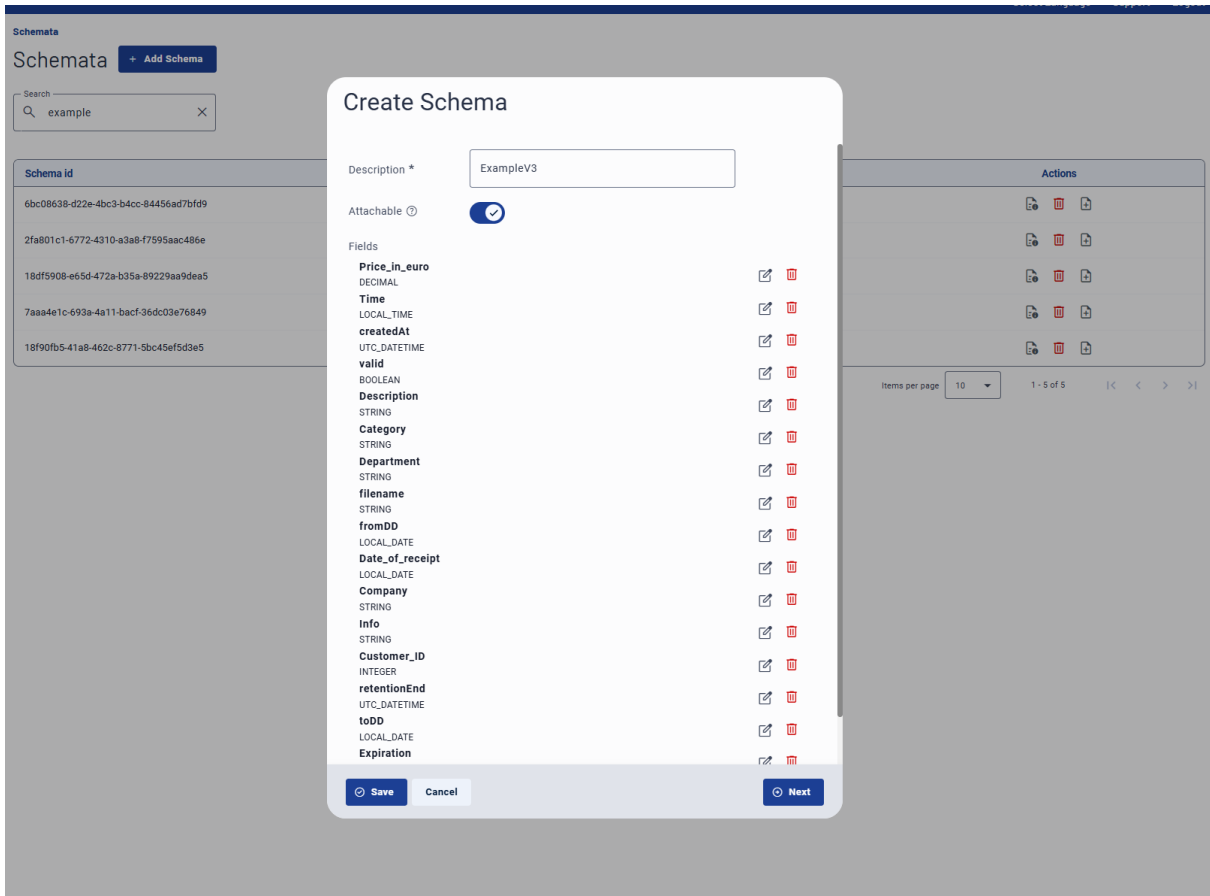
Only deletion is possible as an action. This is only permitted if no data room has been assigned to the schema.

6.2.2.2 Schema creation with template



The Schema function can be used as a template for creation via the actions.

The template function is particularly helpful if a new schema is to be assigned to a data room. This is because all fields of the old schema must also be included in the new schema and the coding of these fields must remain unchanged. New fields can be added as required. This means that the template can be used for this application, new fields can be added or the display settings of the existing fields can be changed (this is permitted).



Create Schema

Description *

Attachable ☒

Fields

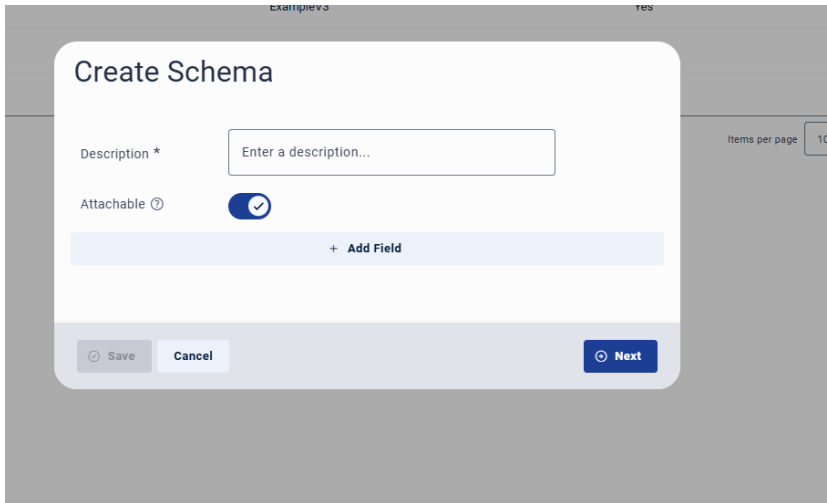
Price_in_euro	DECIMAL	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Time	LOCAL_TIME	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
createdAt	UTC_DATETIME	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
valid	BOOLEAN	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Description	STRING	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Category	STRING	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Department	STRING	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
filename	STRING	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
fromDD	LOCAL_DATE	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Date_of_receipt	LOCAL_DATE	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Company	STRING	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Info	STRING	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Customer_ID	INTEGER	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
retentionEnd	UTC_DATETIME	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
toDD	LOCAL_DATE	<input checked="" type="checkbox"/>	<input type="button" value="X"/>
Expiration		<input checked="" type="checkbox"/>	<input type="button" value="X"/>

With this function, all fields of the selected schema are now visible and can be edited or deleted (please note if this new schema is to replace the old one).

New fields can be added.

The description should be adapted to better distinguish the new schema.

6.2.2.3 Create Schema

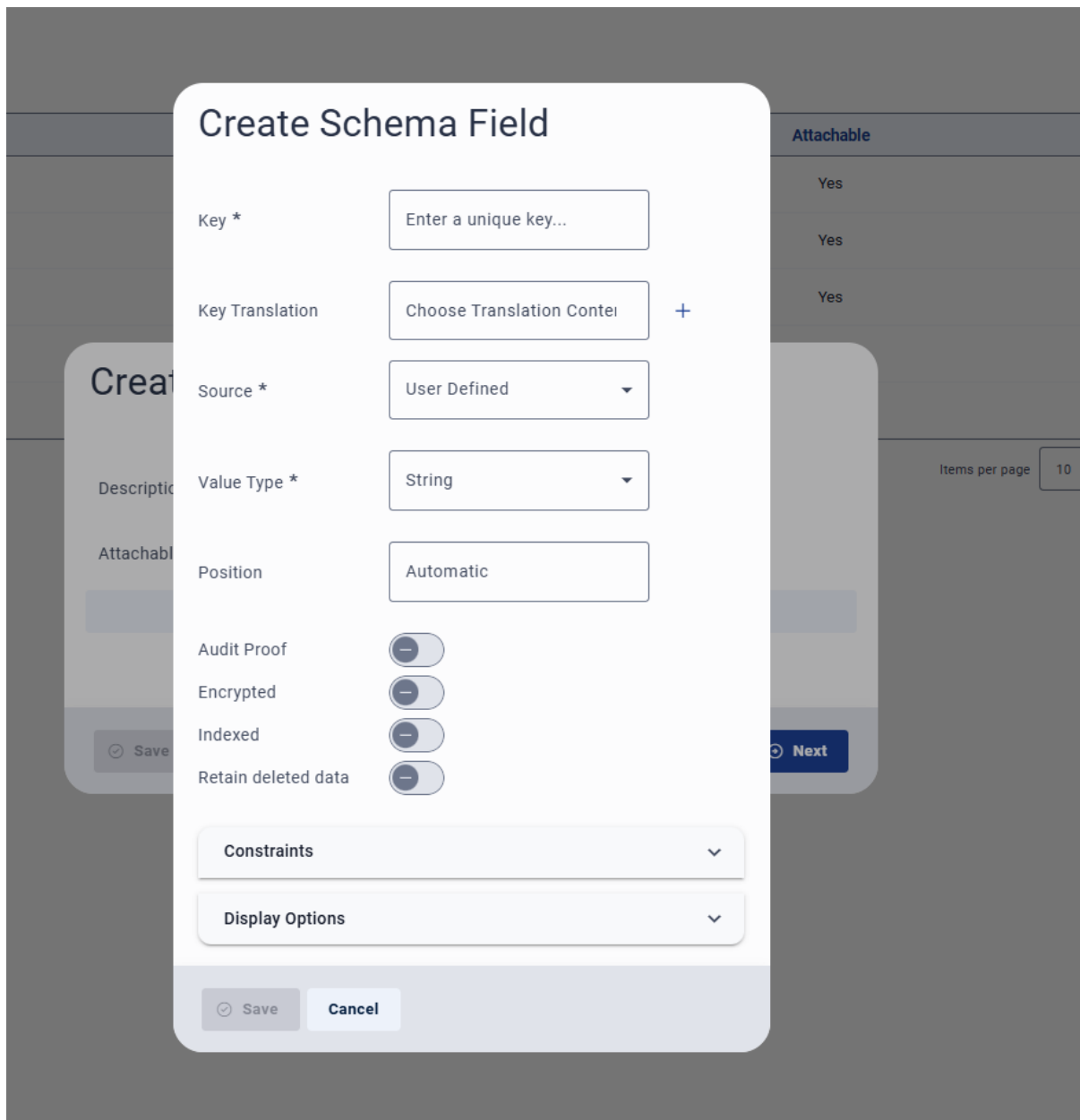


The screenshot shows a 'Create Schema' dialog box. It has a title bar 'Create Schema'. Inside, there is a 'Description *' label followed by a text input field containing 'Enter a description...'. Below this is an 'Attachable ?' label with a toggle switch that is currently turned on (blue). At the bottom of the dialog, there is a '+ Add Field' button. At the very bottom of the dialog, there are three buttons: 'Save' (disabled), 'Cancel', and 'Next' (active).

A new schema can be created using the 'Add schema' button.

A description must be defined for each schema (this can be equated with a name).

The individual metadata fields can now be added via "Add attribute".



Clicking on "Add attribute" opens a separate pop-up in which the individual settings for the respective metadata field can be made.

6.2.2.3.1 Attribute

A unique name for the schema must be defined for the characteristic.

6.2.2.3.2 Key translations

It is possible to define a translation for the characteristic (see [Translations](#)).

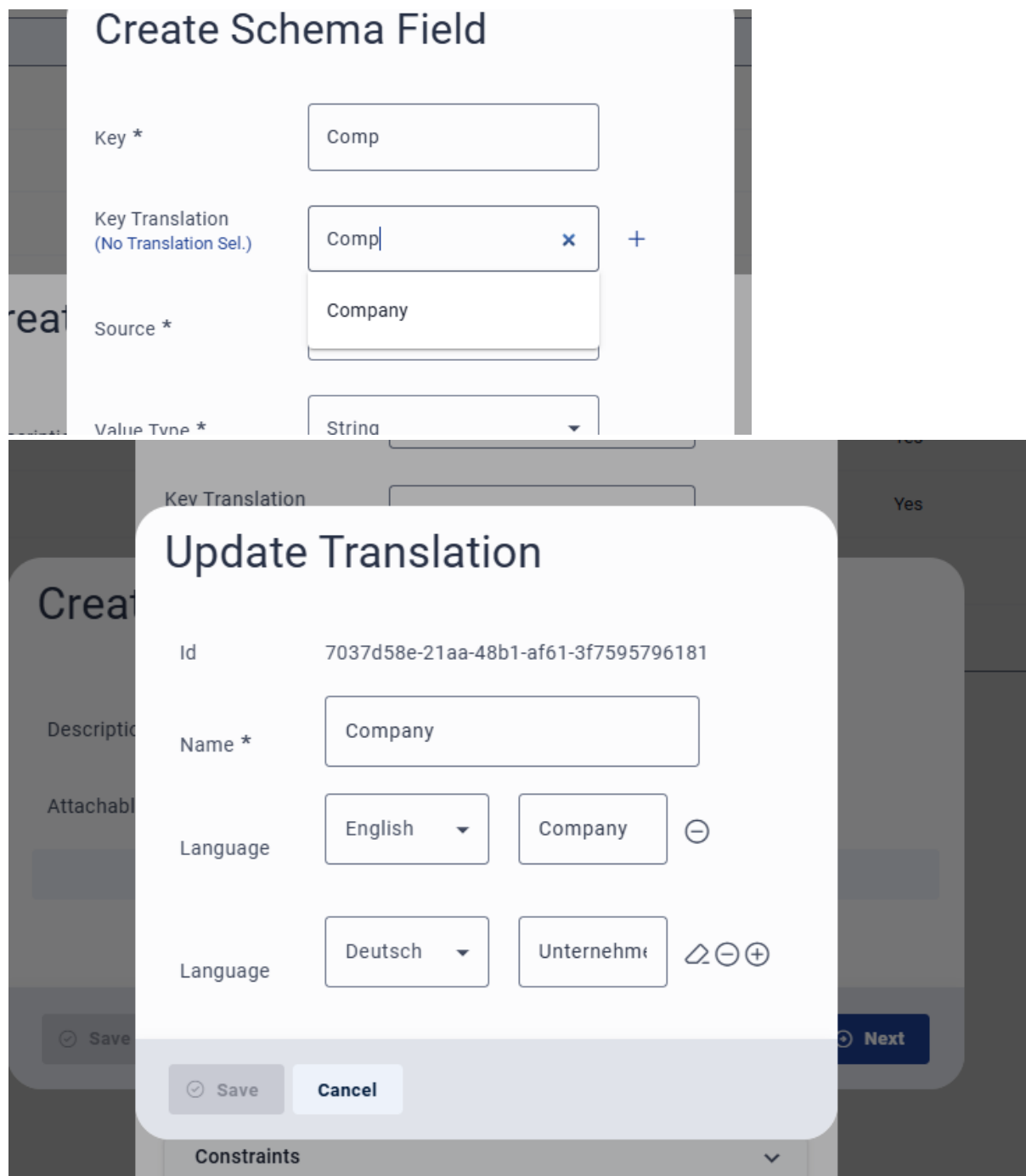
Labels and translations

Ideally, translations are always used, as they act as a label for a metadata field and are displayed instead of the key when uploading or viewing documents in general.

The key has character restrictions that do not apply to translations, so the label gives you more options

In the 'Key translation' field, you can search for existing translations or add a new translation.

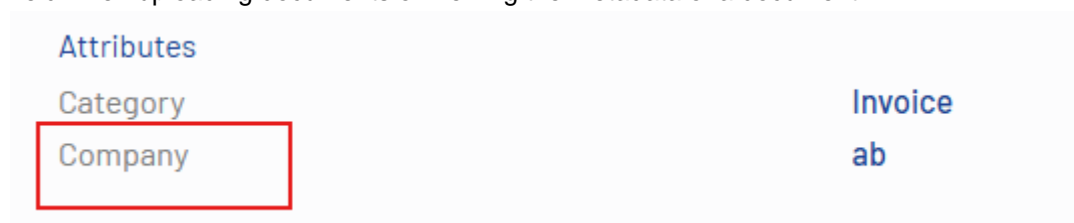
Example: The characteristic is labelled Comp and the translation Company is added as a translation.



The image shows two overlapping forms. The background form is 'Create Schema Field' with fields for Key (*), Key Translation (No Translation Sel.), Source (*), and Value Type (*). The foreground form is 'Update Translation' with fields for Id, Name (*), and two language entries. The first language entry is English with the translation 'Company'. The second language entry is Deutsch with the translation 'Unternehmen'. Both forms have 'Save' and 'Cancel' buttons.

As shown in this image, the translation Company will display the name Company in the English language and the name Unternehmen in the German language.

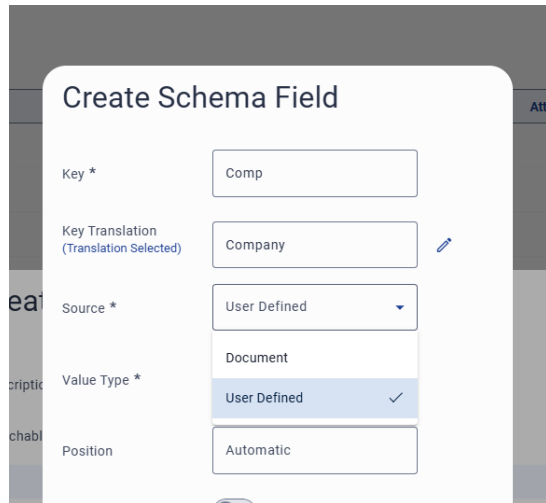
This means that if a user has set English as the language, the name Company will be displayed for this field when uploading documents or viewing the metadata of a document.



The image shows a section titled 'Attributes' with a 'Category' dropdown menu. The 'Company' option is highlighted with a red rectangle. To the right, the text 'Invoice ab' is visible.

This image shows how the Comp field with the translation Company is displayed to the user with the English language as Company.

6.2.2.3.3 Source

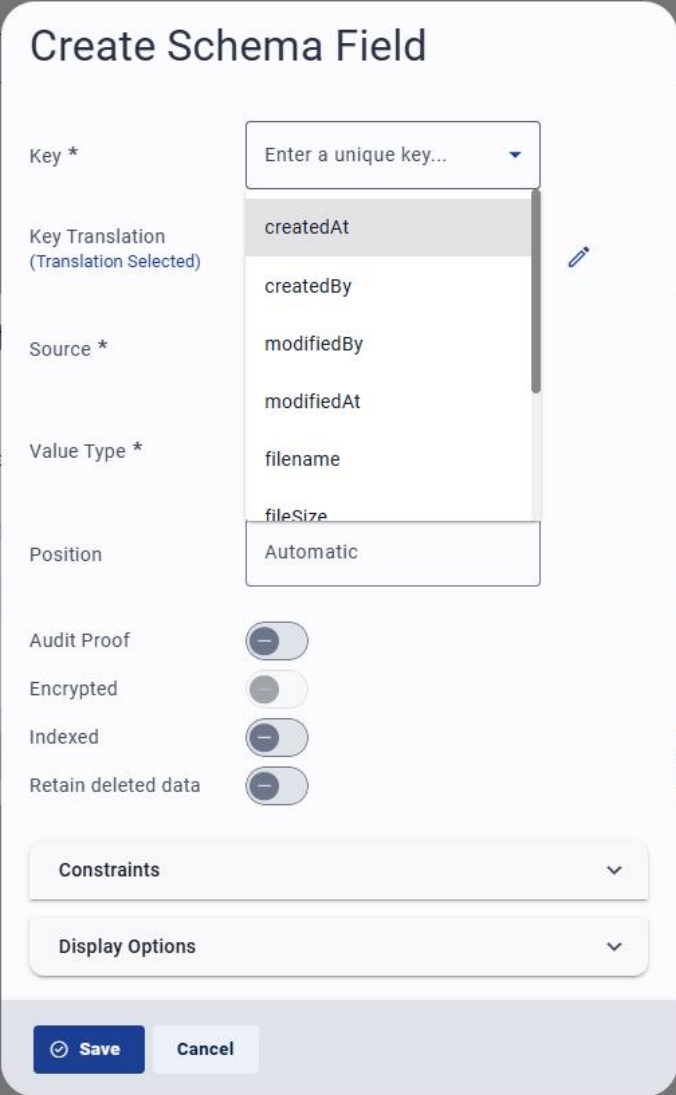


There are two possible types of metadata fields DOCUMENT and USER_DEFINED.

USER_DEFINED are fields that are created individually by the user and can be configured in any way.

DOCUMENT are metadata fields that have already been defined (general metadata). The possible settings for this metadata are limited.

With fields of this type, it is possible to define the display settings, revision security, etc. according to your own wishes.



Create Schema Field

Key *

Key Translation (Translation Selected)

Source *

Value Type *

Position

Audit Proof ☐

Encrypted ☐

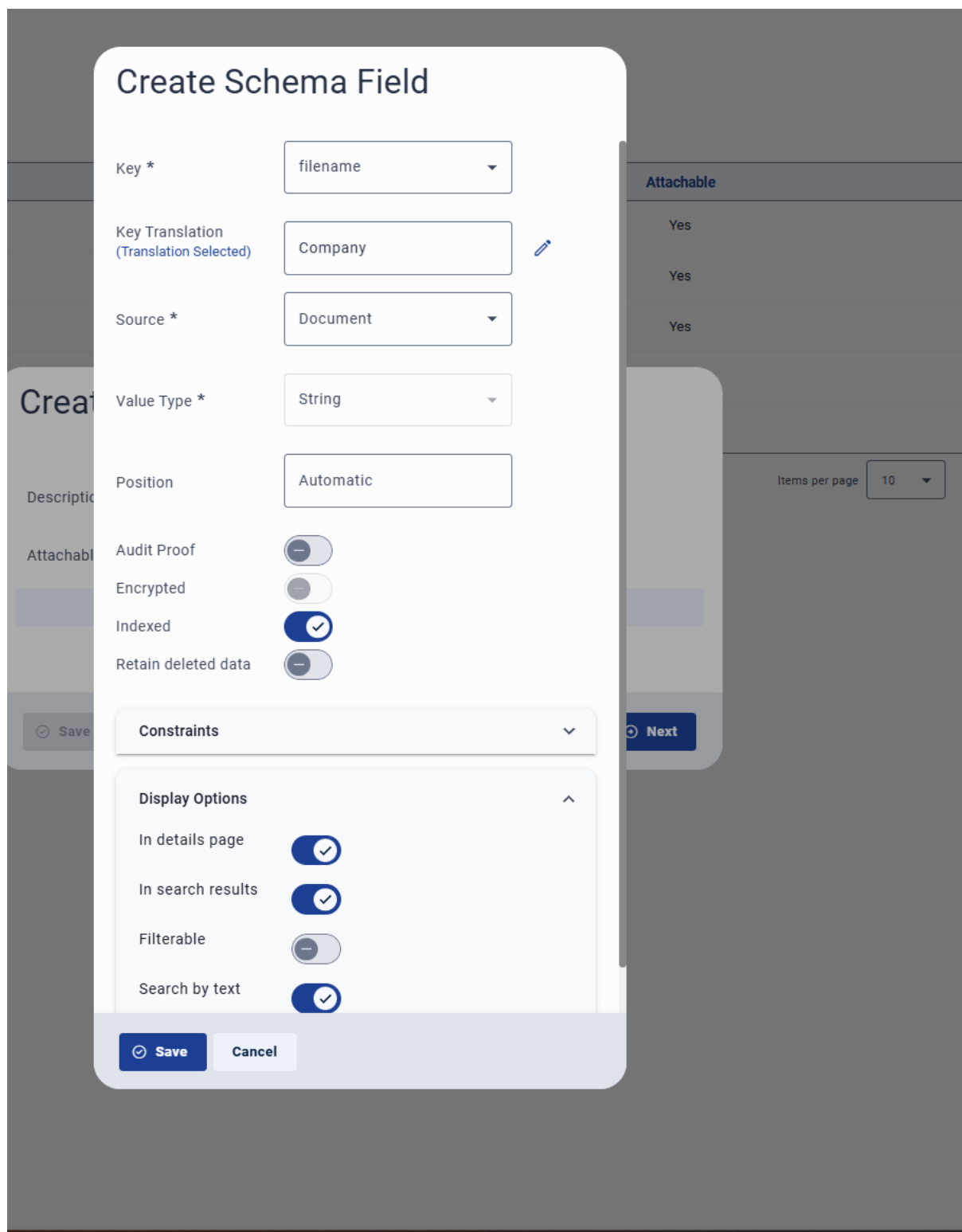
Indexed ☐

Retain deleted data ☐

Constraints


Display Options

As these are existing fields, it is not possible to define your own characteristic name in the DOCUMENT function; instead, the characteristic must be selected from a drop-down list.



Create Schema Field

Key *

Key Translation (Translation Selected) 

Source *

Value Type *


Position


Audit Proof ☐

Encrypted ☐

Indexed ☒

Retain deleted data ☐

Constraints 


Display Options 

In details page ☒

In search results ☒

Filterable ☐

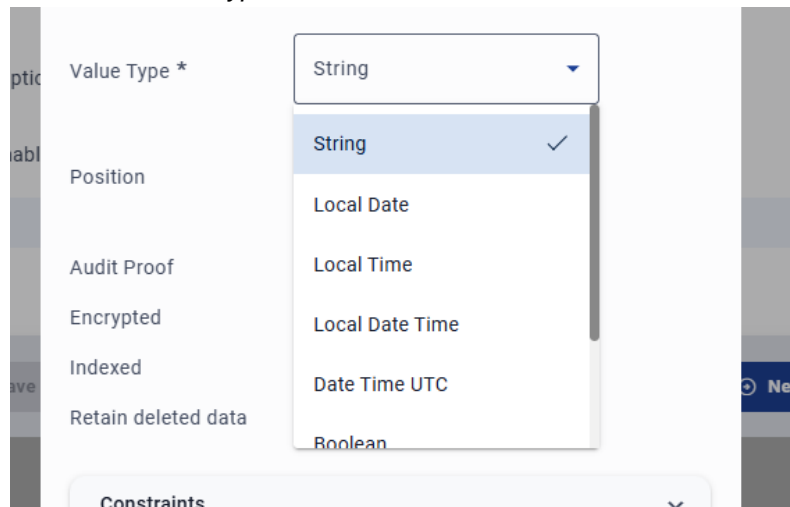
Search by text ☒

 **Save** **Cancel**

Here the characteristic Filename with origin DOCUMENT as an example. This characteristic cannot be encrypted as the file name is required for various operations. In addition, only read access is possible; users cannot change the file name when uploading.

Whether the characteristic should be retained when deleting or whether it should be revision-proof can be defined individually.

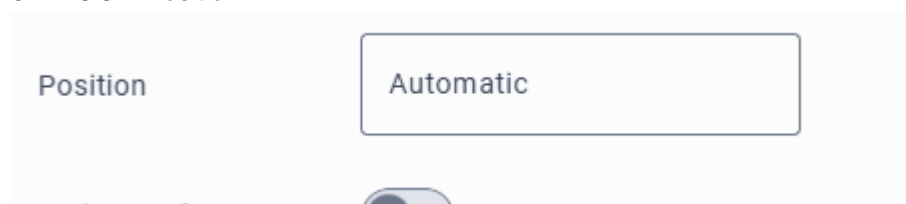
6.2.2.3.4 Value type



Various value types can be defined for the metadata field. This influences the possible entries and other setting options

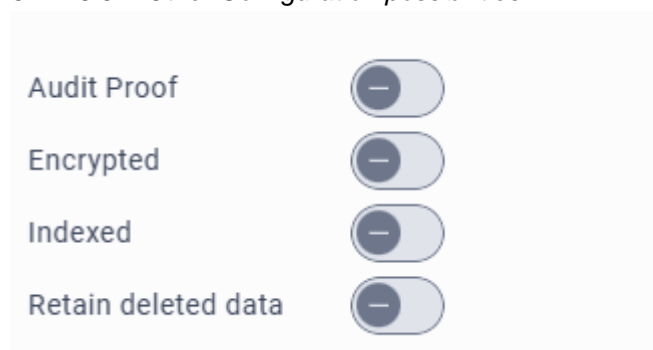
- String: Alphanumeric characters
- BOOLEAN: True/false values
- Integer: Numerical values
- Decimal: Numerical values with decimal places
- Other date values and time values

6.2.2.3.5 Position



The position influences the sorting (always starts with 0, display order of the metadata in the details of the documents). Positioning is always automatic if no change is required.

6.2.2.3.6 Other Configuration possibilities

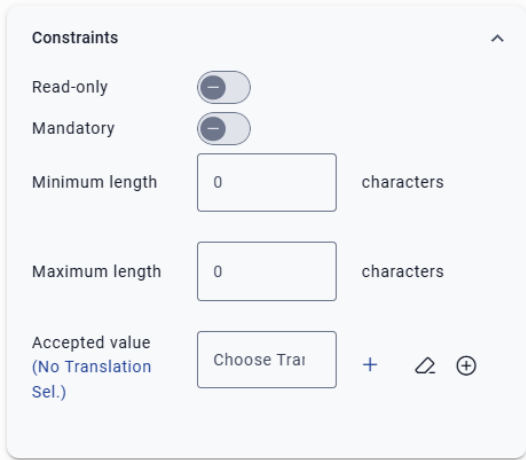


If a metadata field is defined as revision-proof, this is taken into account in the evidence and revision assurance processes. After the document has been deleted, remnants remain to track the revision assurance.

With Encrypted, a metadata field is stored in encrypted form. However, encrypting a metadata field means that it can no longer be searched for.

Indexed must be selected if the metadata field is to be searchable.

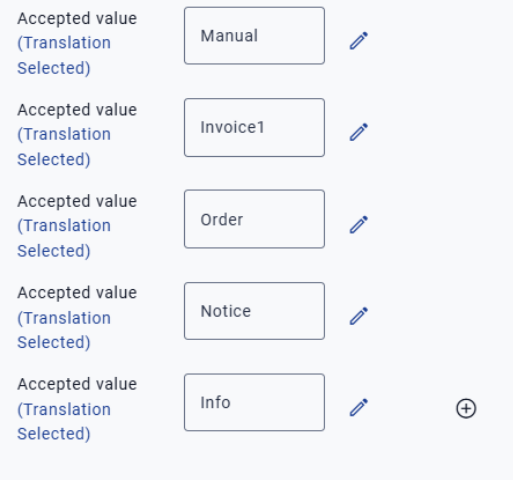
6.2.2.3.7 Settings

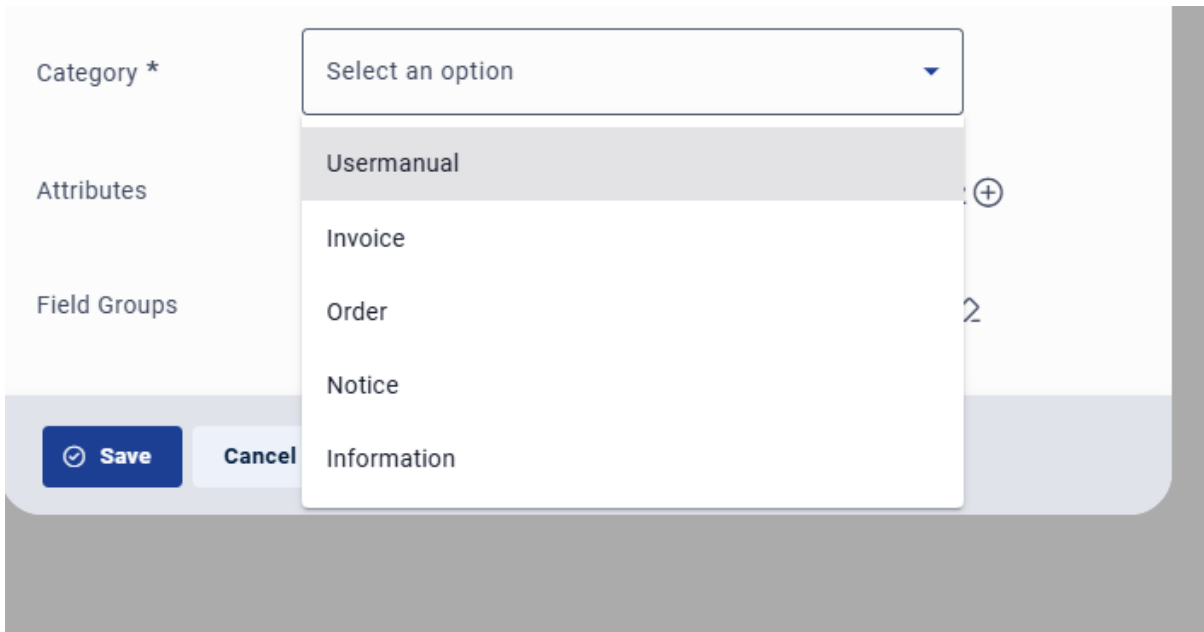


Under Settings, you can manage whether the metadata field can only be used read-only or whether it should be a mandatory field (must be specified when uploading documents)

Furthermore, restrictions are possible when entering the field:

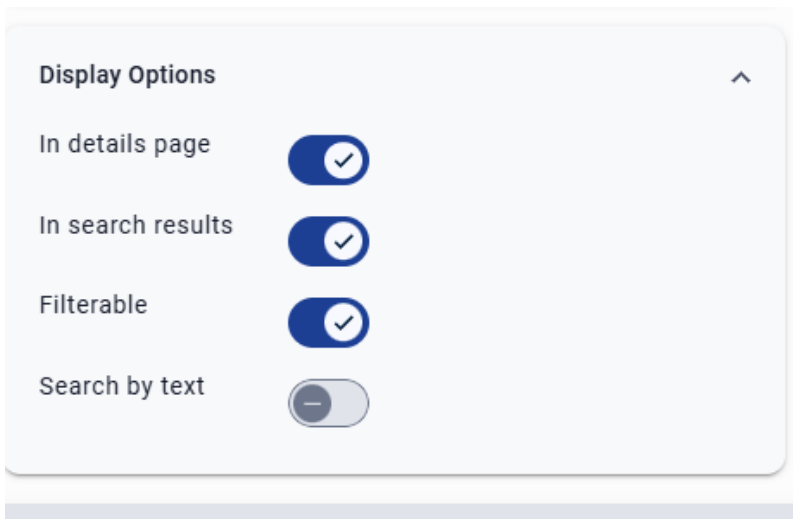
- Minimum length: Min. length of the entry
- Maximum length: Max. length of the entry Maximum length of the input
- Allowed values: If permitted values are defined, the user can select the defined values from a drop-down list when uploading. Translations/labels can also be used here





This screen shows the document upload. When creating the schema, report, information, log, invoice and other were defined as permitted values for the category. The user can now select from these values when uploading.

6.2.2.3.8 Anzeigeeoptionen



On the details page: If Yes, the metadata field is displayed in the document details

In search results: If Yes, it is displayed in the search results


Filterable: If Yes, it can be searched for under "Advanced filters".

Advanced Filter

×


Validity

Choose a date




Creation date

Start Date – End Date



Retention End

Start Date – End Date




Customer ID

Enter an integer number

Date of receipt

Start Date – End Date



valid


Select an option


▼

Category

Select an option

▼

 Search

 Clear Filters

This is particularly useful for fields that have defined permitted values or for date and time formats.
Full text search: If Yes, you can search for the field content in the normal search field.

Search

6.2.2.3.9 Field groups

Create Schema

Description *

Attachable ☒

Fields

valid	BOOLEAN	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Date_of_receipt	LOCAL_DATE	<input type="button" value="edit"/>	<input type="button" value="delete"/>
retentionEnd	UTC_DATETIME	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Category	STRING	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Time	LOCAL_TIME	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Department	STRING	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Expiration	UTC_DATETIME	<input type="button" value="edit"/>	<input type="button" value="delete"/>
createdAt	UTC_DATETIME	<input type="button" value="edit"/>	<input type="button" value="delete"/>
filename	STRING	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Customer_ID	INTEGER	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Price_in_euro	DECIMAL	<input type="button" value="edit"/>	<input type="button" value="delete"/>
fromDD	LOCAL_DATE	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Description	STRING	<input type="button" value="edit"/>	<input type="button" value="delete"/>
toDD	LOCAL_DATE	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Company	STRING	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Info		<input type="button" value="edit"/>	<input type="button" value="delete"/>



Attachable
Yes
Yes
Yes
Yes
Yes
Items

Create Schema



Field Groups

validity

RANGE

+ Add Field Group

 Save Cancel  Go back


Create Field Group

Field Group Key *

Key Translation +

Fields to Connect * And

Field Group Type *

 Save Cancel


Edit Field Group

Field Group Key *

Key Translation +

Fields to Connect * And

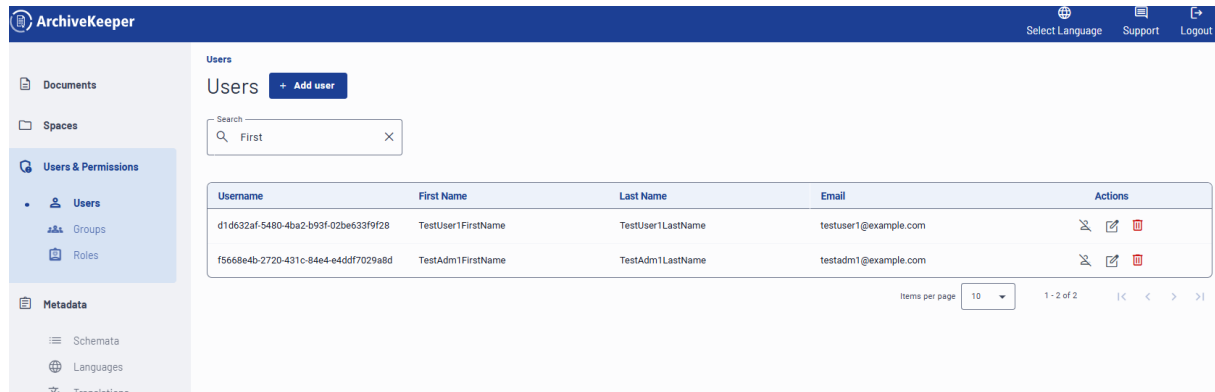
Field Group Type *

 Save Cancel

When you click "Next" after creating all meta data fields, you can add fieldgroups.

Fieldgroups are a possibility to connect two meta data fields. Eg.g you can display a date range with to date meta data fields. During an upload a user can put an input in these fields. In the search fields only one date picker will be available. With that a user can search for documents where the date inbetween the date range. With that validity date ranges can be displayed.

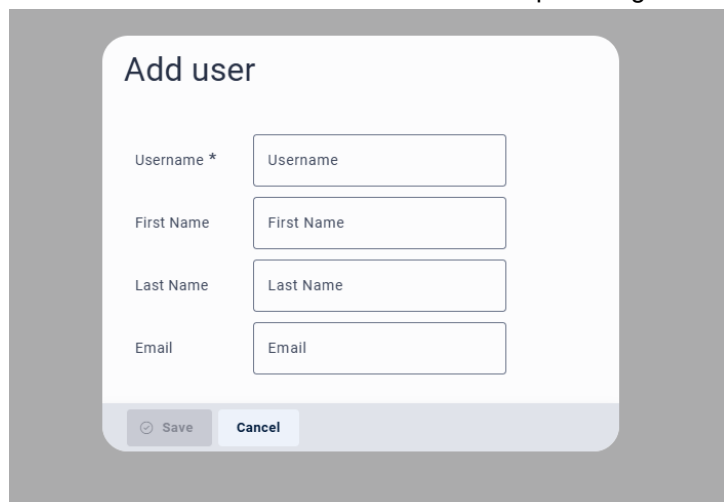
6.2.3 User



New users can be added and existing users can be managed under Users. The search function makes it easy to find existing users.

6.2.3.1 Add User

Additional users can be saved in ArchiveKeeper using the 'Add user' button.

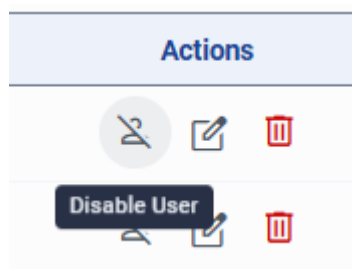


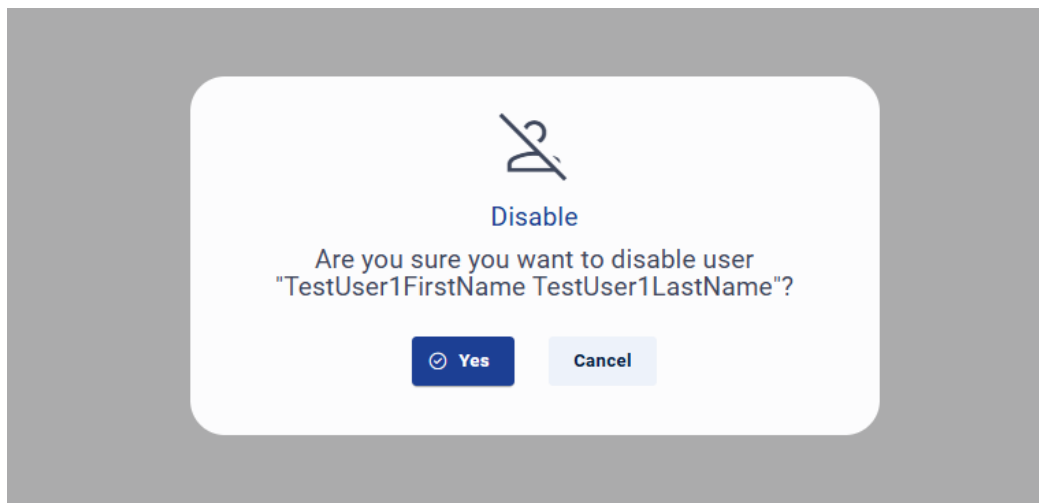
When adding, the user's basic data must be added.

IDP

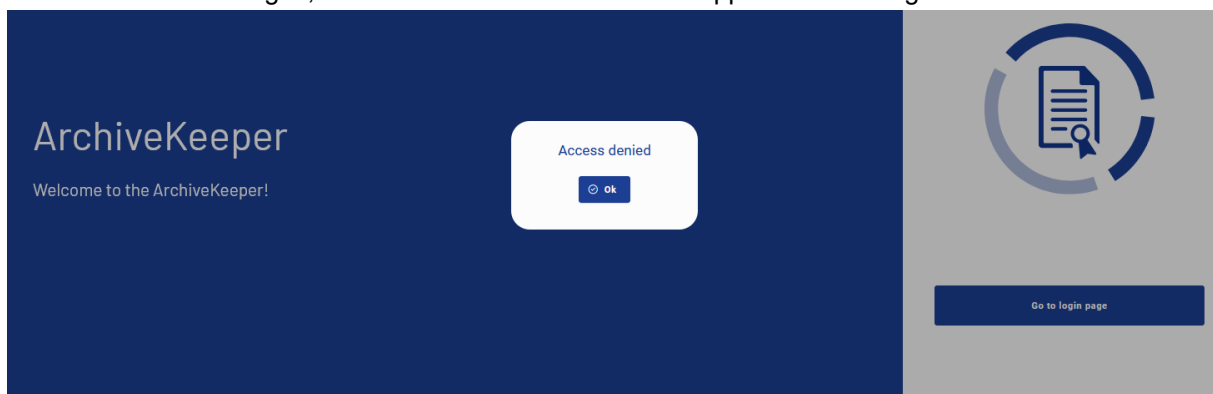
When using an IDP, it is also possible to define an automatic creation of the user via the IDP, so no direct creation in ArchiveKeeper is necessary.

6.2.3.2 Deactivate user



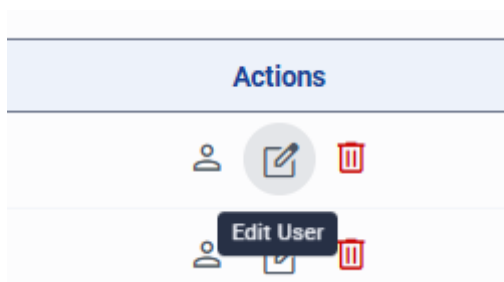


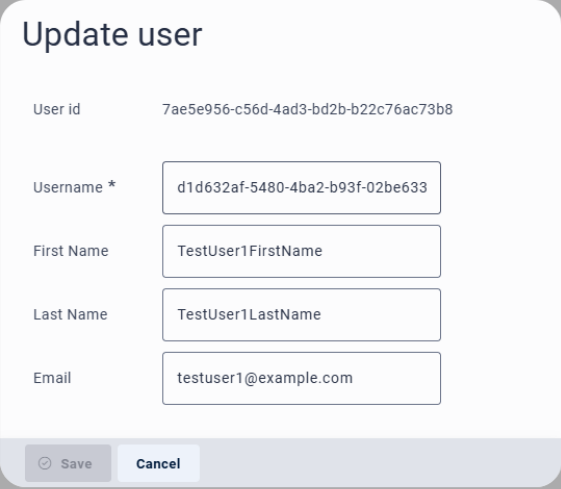
The user can be deactivated in the actions. The action must be confirmed again in the pop-up. Deactivated users are still present in ArchiveKeeper, but no longer have access to ArchiveKeeper. If this user wants to log in, the information 'Access denied' appears on the login screen.



Deactivated users can be reactivated in ArchiveKeeper at any time

6.2.3.3 Edit user





Update user

User id 7ae5e956-c56d-4ad3-bd2b-b22c76ac73b8

Username * d1d632af-5480-4ba2-b93f-02be633

First Name TestUser1FirstName

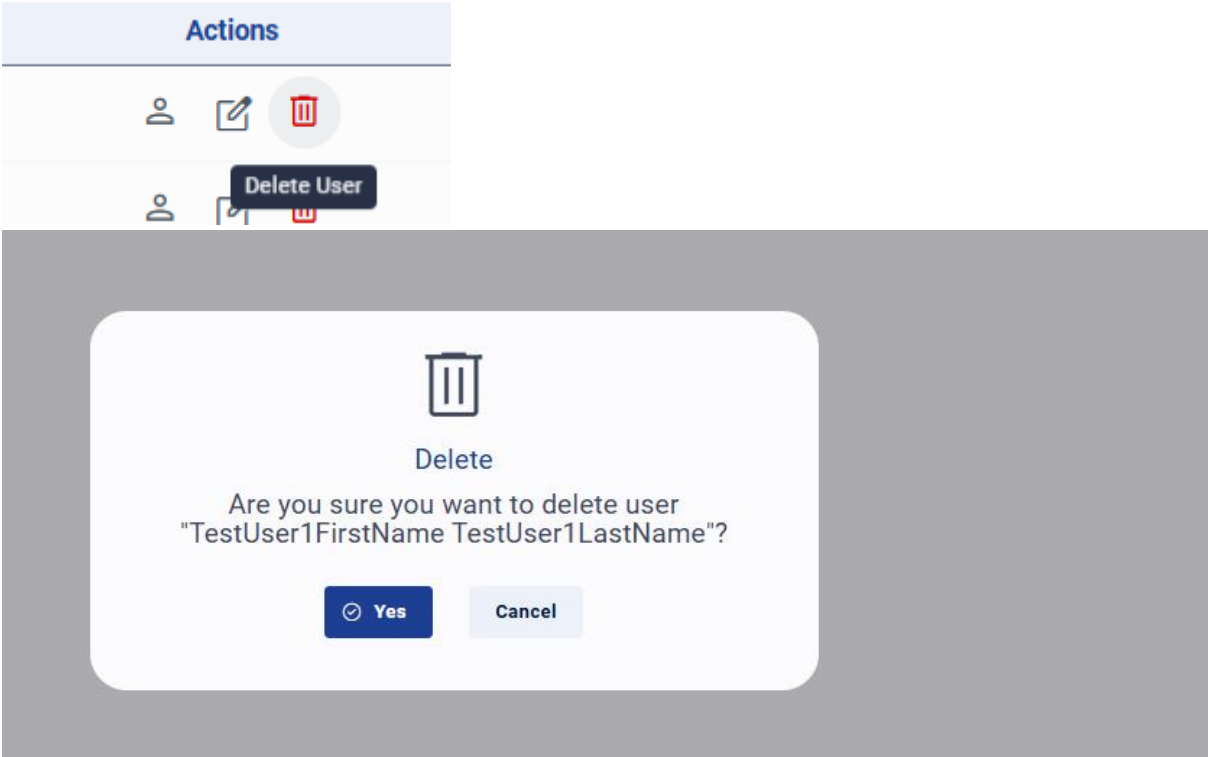
Last Name TestUser1LastName

Email testuser1@example.com

Save Cancel

With the Edit action, the information about a user can be customised.

6.2.3.4 Delete user



Actions

Delete User

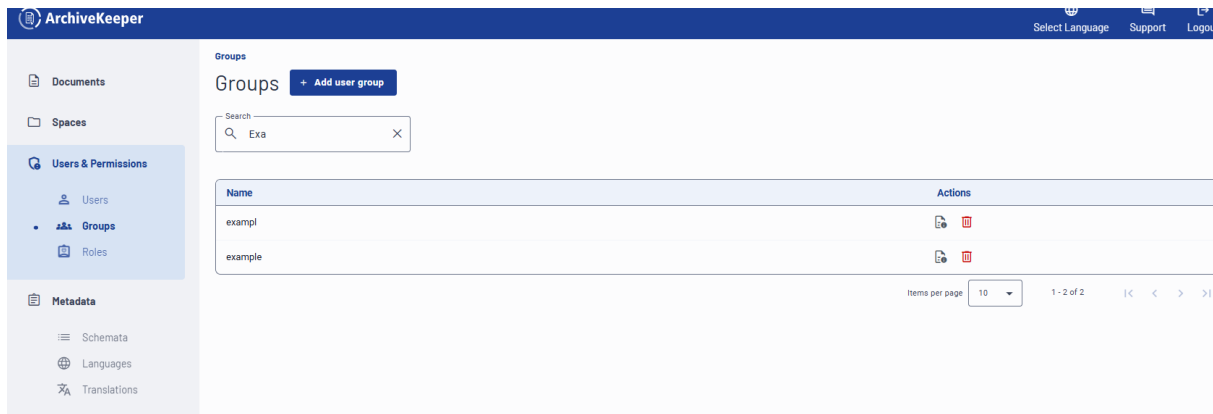
Delete

Are you sure you want to delete user "TestUser1FirstName TestUser1LastName"?

Yes Cancel

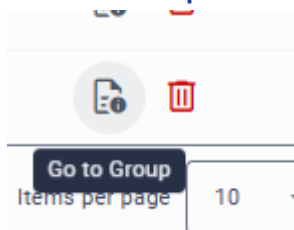
Users can also be deleted again. This must also be confirmed again.
In contrast to deactivation, the user is deleted from the system.

6.2.4 Groups



Existing groups can be managed and new groups added under Groups.
Existing groups can be found easily using the search function.

6.2.4.1 Group details

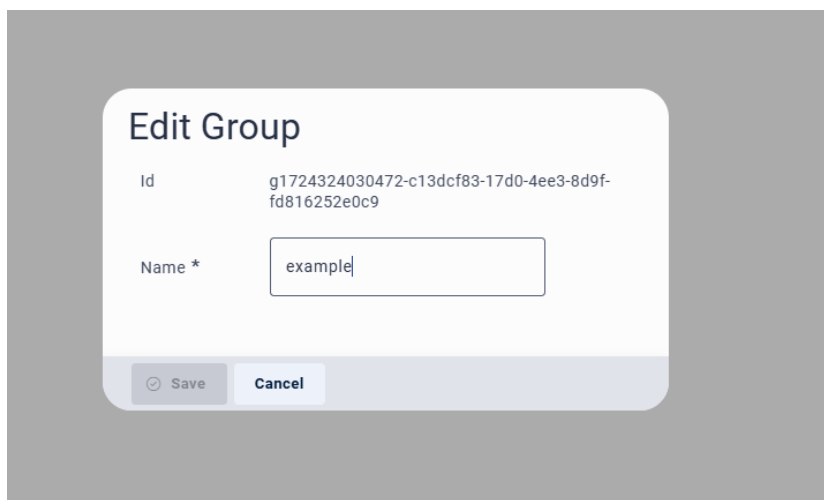


The actions take you to the detailed view of a group.



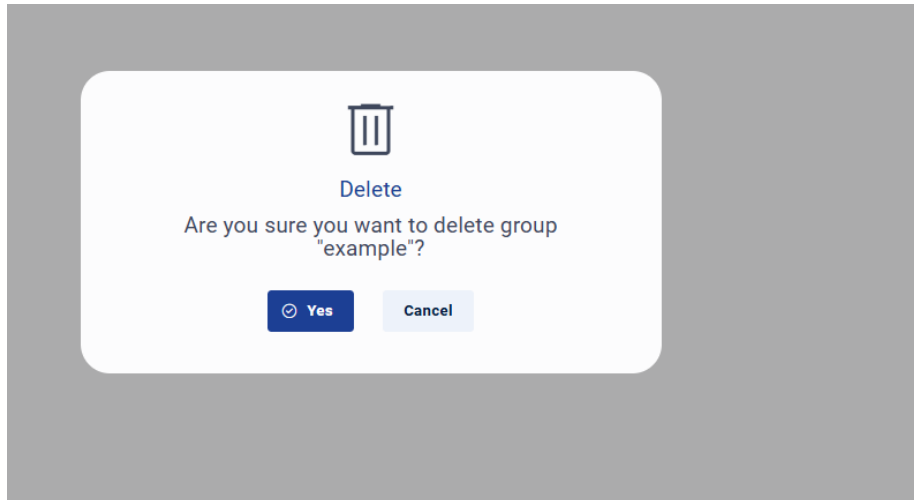
Hier stehen drei Reiter zur Auswahl (Übersicht, Benutzer und Datenräume) und zwei Aktionen die über das Menü (drei Punkte) ausgewählt werden können.

6.2.4.1.1 Edit



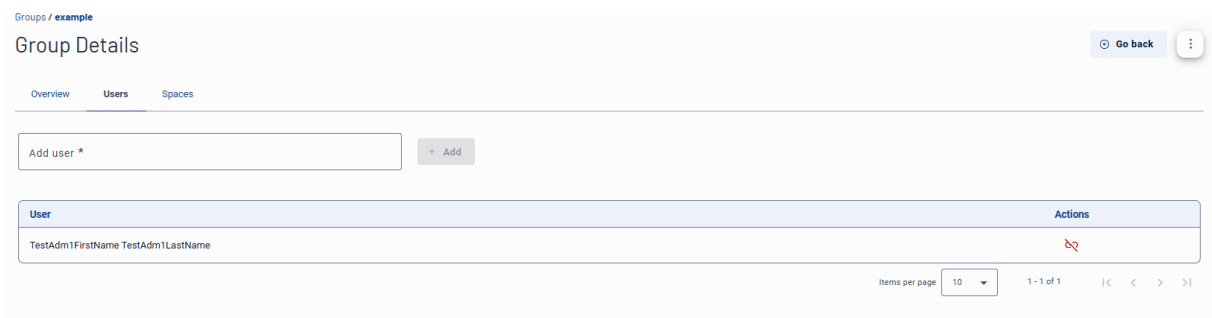
The group name can be changed in the edit group view.

6.2.4.1.2 Delete

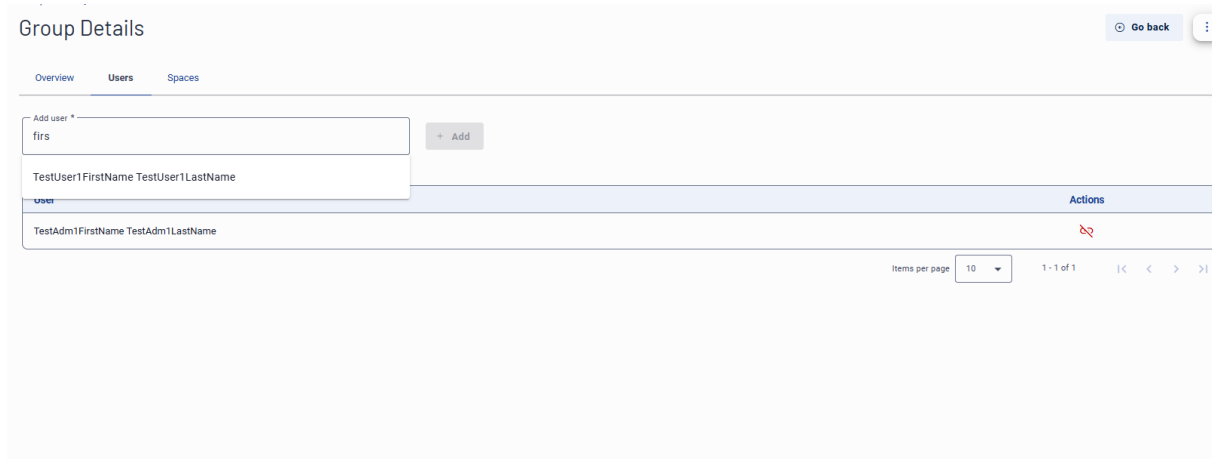


This allows you to delete the group. A pop-up appears in which the deletion must be confirmed.

6.2.4.2 Users



In the Users tab, existing users can be removed from the group and new users can be added.



The desired user can be searched for and added to the group via the input field.

6.2.4.3 DocSpaces

Groups / **example**

Group Details

Overview Users Spaces

Space *

Permissions **Read** Write Logical Delete Physical Delete Force Delete + Add document space

Space	Read	Write	Logical Delete	Physical Delete	Force Delete	Actions
daterangetest	✓	✓	✓	✓	×	
DocSpace0325	✓	✓	✓	✓	✓	
DocSpaceRange0325	✓	✓	✓	✓	×	
Example No RS	✓	✓	✓	✓	✓	
fieldgrouptest	✓	✓	✓	✓	×	
Testcontract	✓	✓	✓	✓	×	
Testcontract2	✓	✓	✓	✓	×	

Items per page 10 1 - 7 of 7 |< < > >|

Similar actions are possible under data rooms as when editing the groups in a data room (see [DocSpace](#)).

The only difference is that the data rooms are managed for the specific group and not the other way round.

The desired data room can be added via the input field and the corresponding rights assigned. (see [Permission concept](#))

For existing data rooms, the rights for the group can be adjusted or the data room can be removed.

6.2.5 Roles

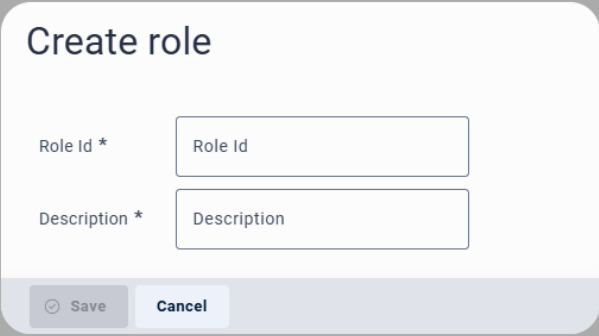
Roles

Roles + Add role

Role Id	Description	Actions
API	API access	
ADMIN	Administrator role with all permissions	
Support	Leserechte	
test	test	

Existing roles can be edited and new roles added under roles.

6.2.5.1 Create role



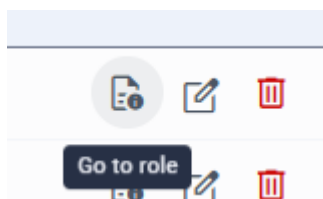
The 'Create role' form is a white card with rounded corners on a grey background. It contains two input fields: 'Role Id *' and 'Description *'. Below the fields are two buttons: 'Save' (with a circular arrow icon) and 'Cancel'.

When creating a role, initially only the unique name (ID) and the description need to be defined. The authorisations are assigned in the role details.

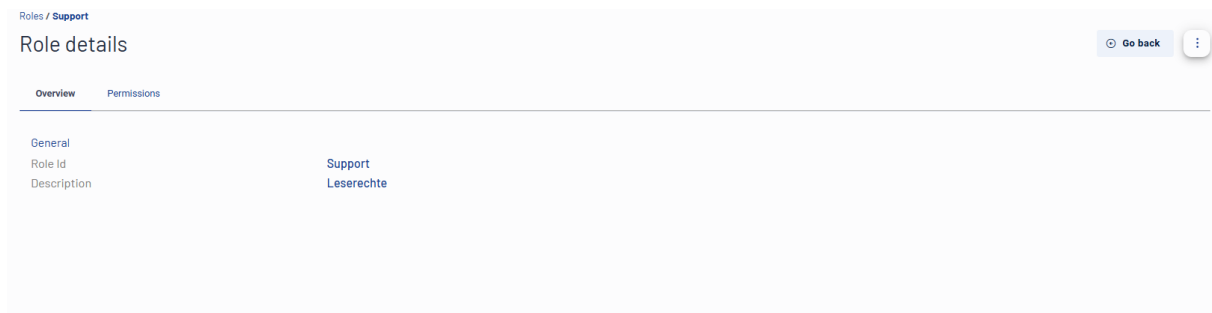
Connect role

A role have to be connected to an IDP (if used)

6.2.5.2 Role details



6.2.5.2.1 Overview




The ID and description of the role can be seen in the overview tab. The description can be edited via the menu (ID cannot be changed) or the role can be deleted.

Update role

Role Id Support

Description *



Delete

Are you sure you want to delete role "Support"?

The deletion of a role have to be confirmed

6.2.5.2.2 Permission administration of a role

Roles / **Support**

Role details Go back

Overview **Permissions**

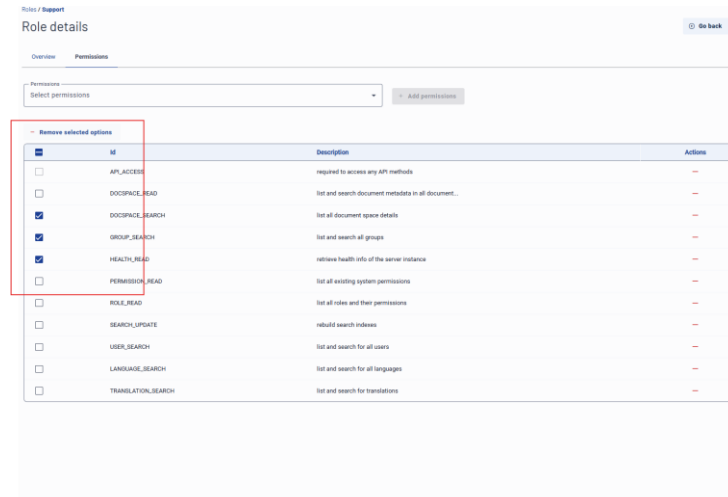
Permissions
Select permissions

+ Add permissions

<input type="checkbox"/>	Id	Description	Actions
<input type="checkbox"/>	API_ACCESS	required to access any API methods	—
<input type="checkbox"/>	DOCSpace_READ	list and search document metadata in all document...	—
<input type="checkbox"/>	DOCSpace_SEARCH	list all document space details	—
<input type="checkbox"/>	GROUP_SEARCH	list and search all groups	—
<input type="checkbox"/>	HEALTH_READ	retrieve health info of the server instance	—
<input type="checkbox"/>	PERMISSION_READ	list all existing system permissions	—
<input type="checkbox"/>	ROLE_READ	list all roles and their permissions	—
<input type="checkbox"/>	SEARCH_UPDATE	rebuild search indexes	—
<input type="checkbox"/>	USER_SEARCH	list and search for all users	—
<input type="checkbox"/>	LANGUAGE_SEARCH	list and search for all languages	—
<input type="checkbox"/>	TRANSLATION_SEARCH	list and search for translations	—

The existing authorisations are shown in the Permissions tab and further authorisations can be selected via the Permissions field.

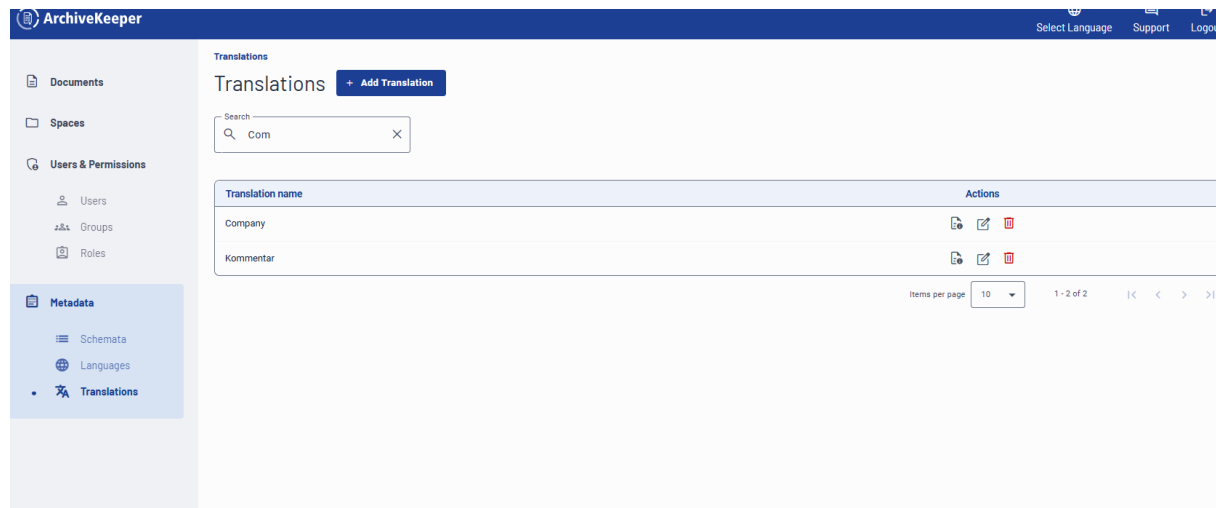
Details on the individual authorisations can be found under [Permission concept](#).



Rights can be removed individually via actions or collectively by selecting the desired rights via checkbox and removing them from the role via "Remove selected rights".

6.2.6 Translations

6.2.6.1 Translations

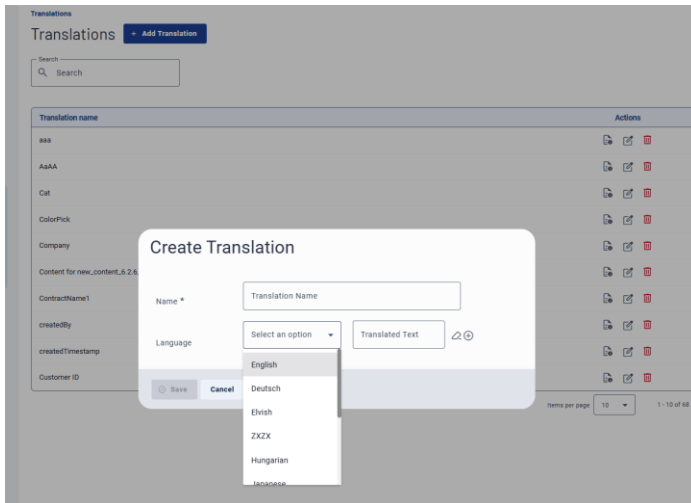


Under Translations, new translation content can be added and existing translations can be edited or deleted.

The search function can be used to search for existing translations.

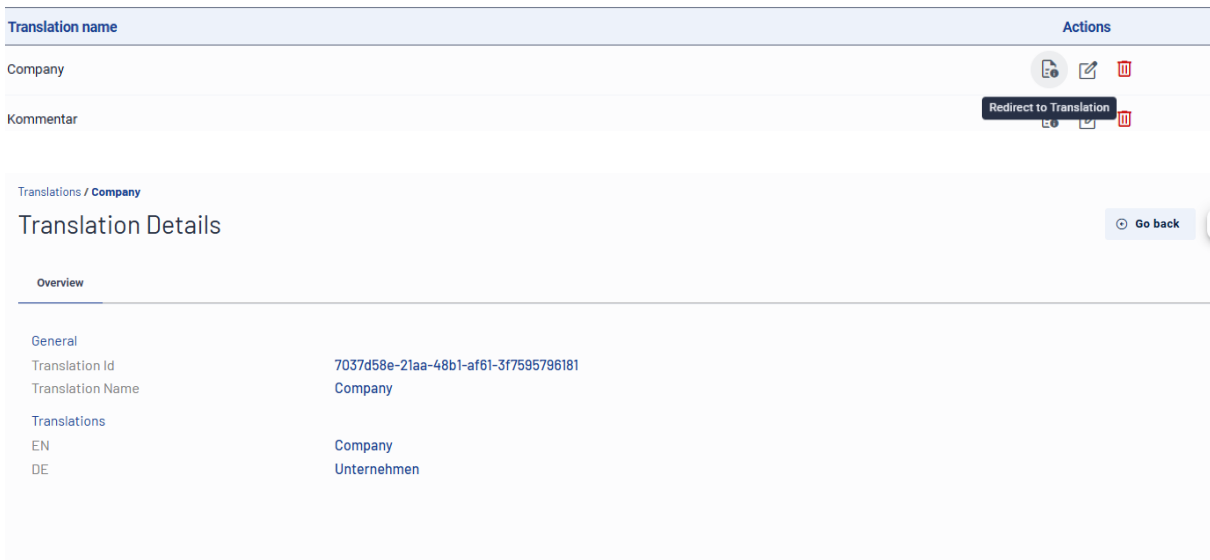
The translations are used for the translation or labelling of metadata schemas.

6.2.6.1.1 Add Translation



When adding translations, translations for certain words are added to the existing languages (created in the languages menu item).

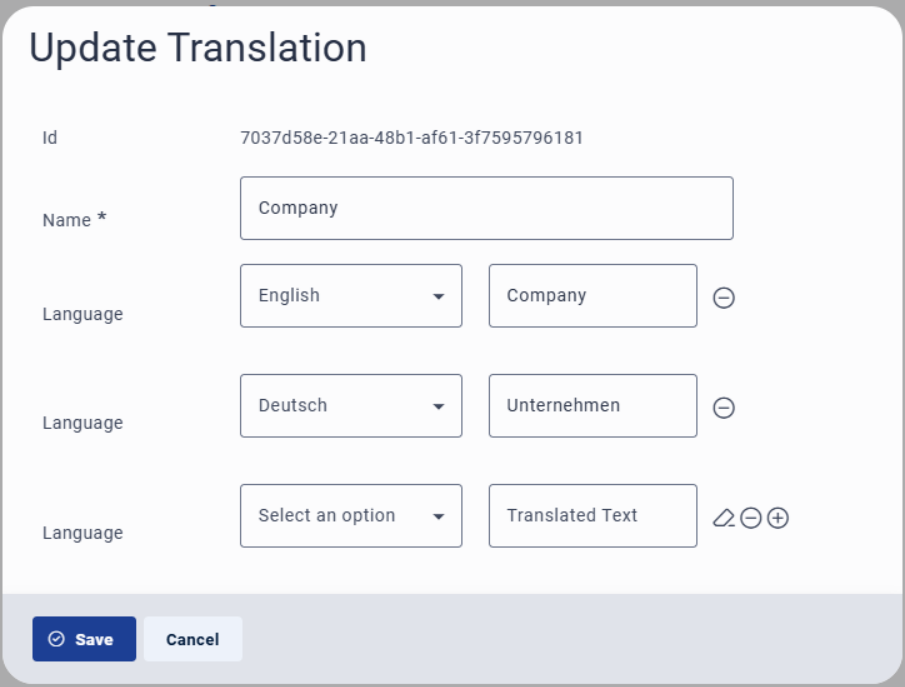
6.2.6.1.2 Translation details



Translations / Company	
Go back	
Overview	
General	
Translation Id	7037d58e-21aa-48b1-af61-3f7595796181
Translation Name	Company
Translations	
EN	Company
DE	Unternehmen

The translation details show the ID, name and the individual translations for each language. The translations can be edited or deleted via the menu.

6.2.6.1.3 Update Translation

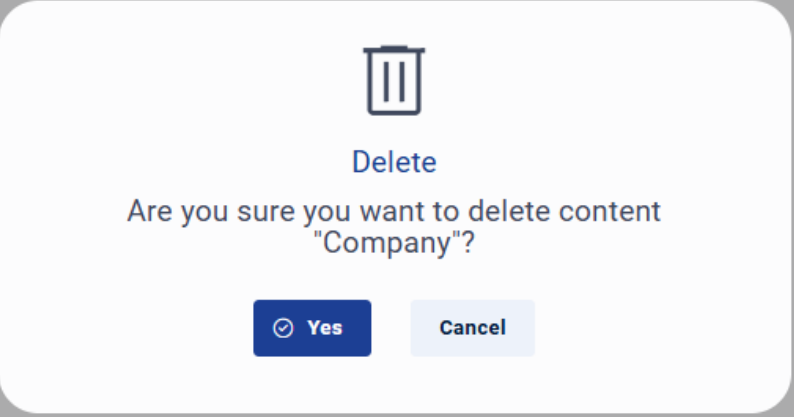


The 'Update Translation' dialog box displays the ID '7037d58e-21aa-48b1-af61-3f7595796181'. It features a 'Name *' field with the value 'Company'. Below this, there are three language entries. The first entry shows 'English' in a dropdown and 'Company' in a text field with a minus icon. The second entry shows 'Deutsch' in a dropdown and 'Unternehmen' in a text field with a minus icon. The third entry shows 'Select an option' in a dropdown and 'Translated Text' in a text field with a plus icon. At the bottom, there are 'Save' and 'Cancel' buttons.

When editing, the translation name can be changed and the translations of the individual languages and new languages for translations can be added.

The available languages can be managed under the Languages menu (see [Languages](#))

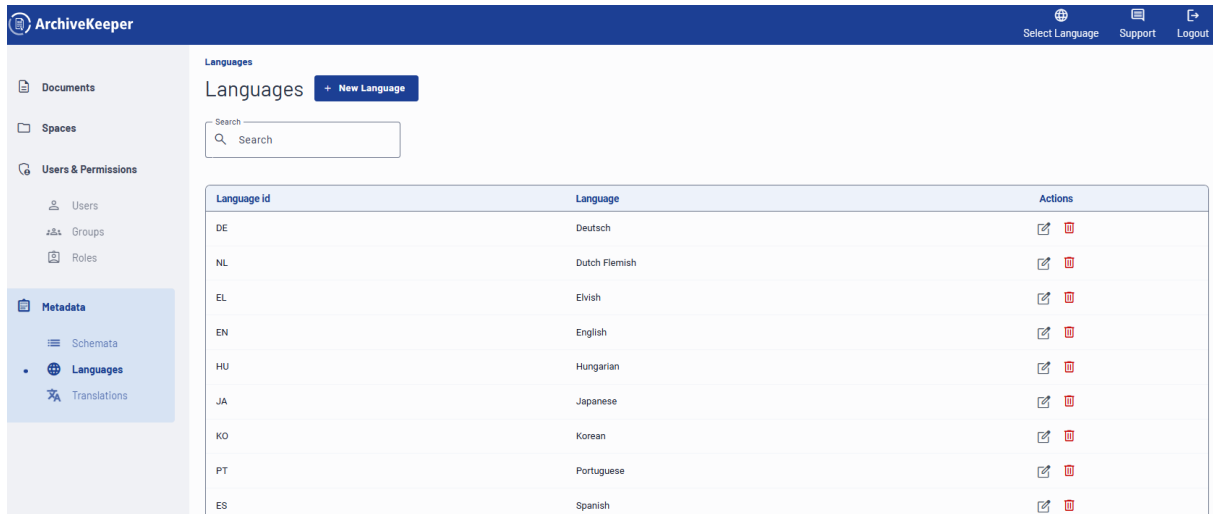
6.2.6.1.4 Delete Translation





















The 'Delete' dialog box features a trash can icon and the text 'Delete'. It asks, 'Are you sure you want to delete content "Company"?' and provides 'Yes' and 'Cancel' buttons at the bottom.

Translations can only be deleted if they are not used in any schema.

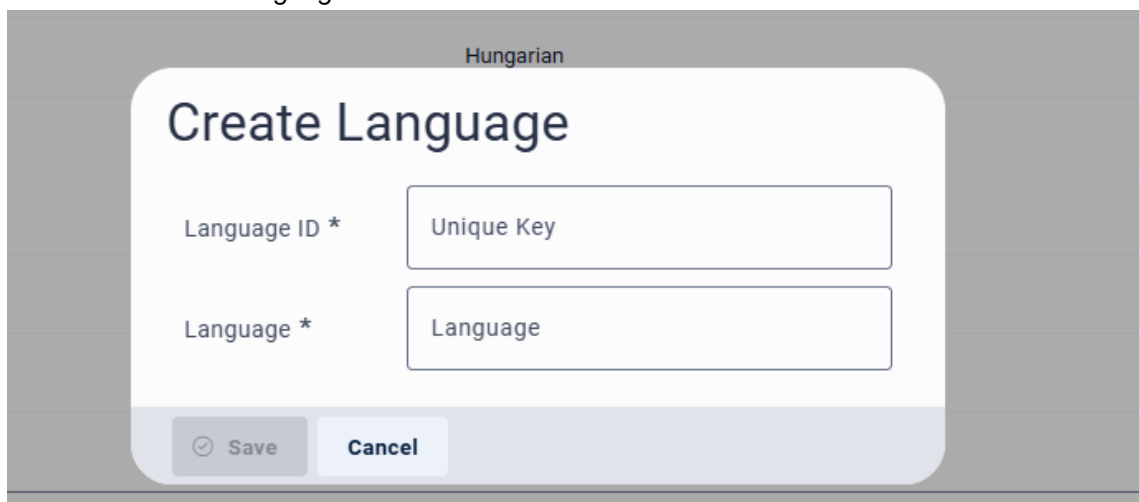
6.2.6.2 Languages



Language id	Language	Actions
DE	Deutsch	 
NL	Dutch Flemish	 
EL	Elvish	 
EN	English	 
HU	Hungarian	 
JA	Japanese	 
KO	Korean	 
PT	Portuguese	 
ES	Spanish	 

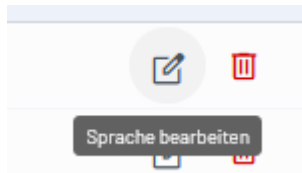
Languages can be added or managed under Languages. These languages are then available in the individual translations ([Translations](#) menu).

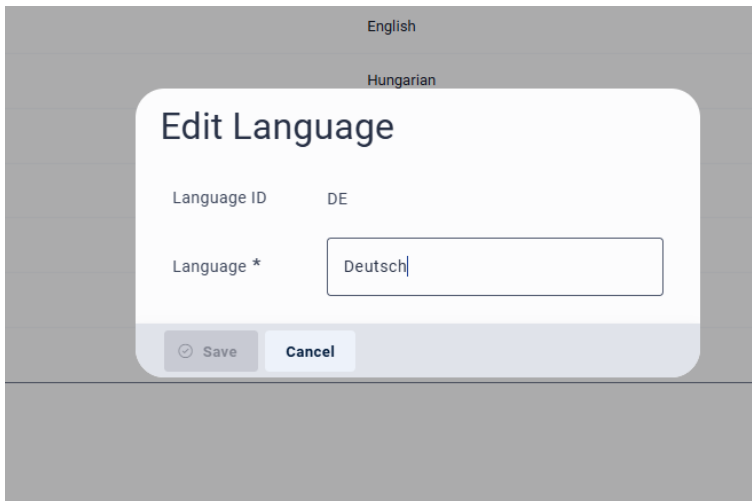
6.2.6.2.1 Create Language



When adding a language, a unique ID and the name of the language must be defined. e.g. ID = de-at and language = German and ID = de-ch and language = German.

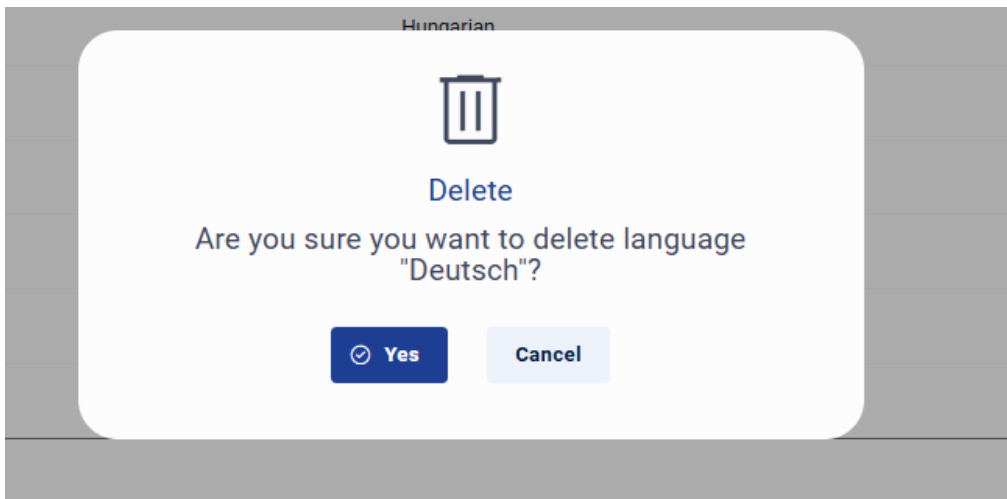
6.2.6.2.2 Edit language



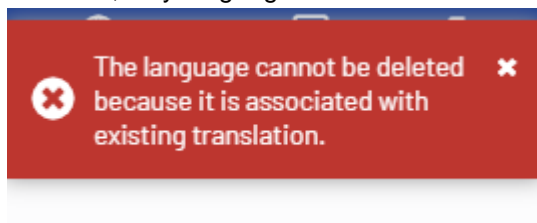


When editing, only the language name can be changed but not the ID.

6.2.6.2.3 Delete Language



It is possible to delete a language via the actions. However, only languages for which there are no translations yet can be deleted.



7. Training and other information

If you have any questions about using ArchiveKeeper, the RISE team will be happy to advise you. We are also happy to offer on-site training courses.

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