

X-ROAD

MISP2 MANAGER'S GUIDE



**Euroopa Liit
Euroopa
Regionaalarengu Fond**



Eesti tuleviku heaks

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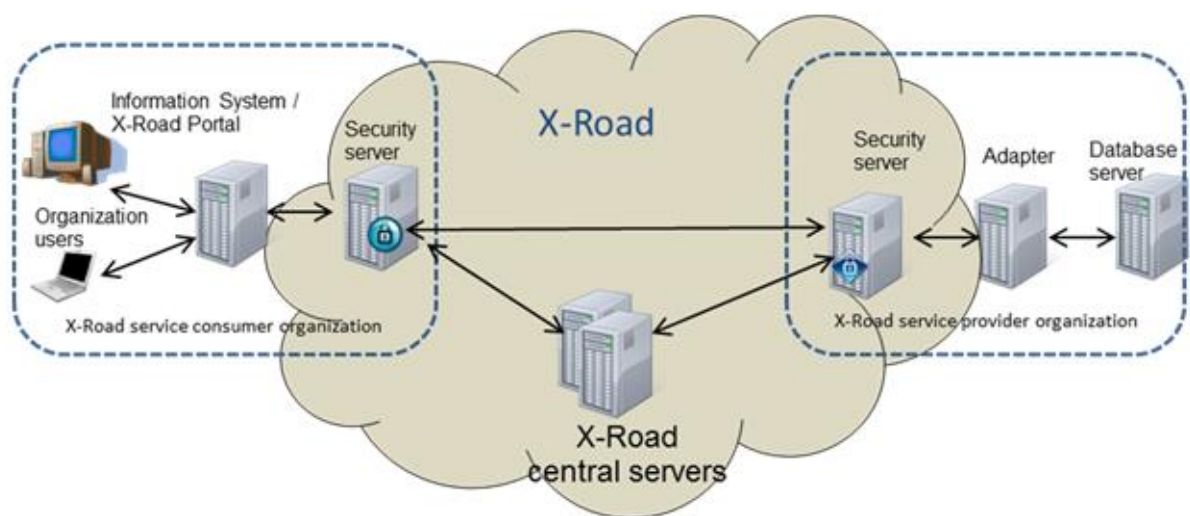
1 INTRODUCTION

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

1.2.1 Introduction

MISP2 is an application that allows organizations to execute X-Road services opened to them.

MISP2 provides:

- MISP2 (mini information system portal) - standard X-Road component
- Fast alternative to organisation's IS X-road integration: easy way to start using X-Road services
- Generates automatically UI for X-Road services (input/output forms)
- Uses XForms technology (Orbeon XForms engine)

1.2.2 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.

1.2.3 User roles

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

- **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.
- E-service user
 - Uses e-services open to their user group in the portal.
 - Uses public e-services in the portal.

1.3 SYSTEM REQUIREMENTS

1.3.1 Browser

The portal is available in the recent versions of popular browsers (Internet Explorer, Firefox, Google Chrome).

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

For general information about portal functionality please refer to the documentation “MISP2 user guide”.

3 SERVICE MANAGER

3.1 E-SERVICE MANAGEMENT

Only developers and portal managers are allowed to manage e-services. To manage e-service, select the tab “SOAP Services” or “REST Services” from the menu and you will be provided with a list of producers saved in the portal. Complex producers are listed on the right, active X-road producers on the left.

Producer	Description
COM : 11333578 : aktorstest-db01	Aktors OÜ
COM : 11333578 : misp2-soap-service-v6	Aktors OÜ

Complex producer name	Complex producer description (EN)
aktorstest-v6-complex	X-tee v6 complex producer

Producer name format differs in X-road version 5 and version 6 portals. In version 5, producers are described by a single short name in X-road environment. In X-road version 6, however, producers are identified by three fields: member class, member code and subsystem code. In the current system producer list, all these fields are separated by colon (see “Producer” column of the image above).

3.1.1 Refreshing X-Road SOAP producers list

To refresh the producers list, click on the “All producers” button and then click on the button „Refresh producers”. A meta-query is sent to the secure server to access the X-Road producers list.

In X-road version 6, producers and consumers are not distinguished, they are all considered clients and displayed together in the producers list. The user has to be able to select the correct producer. To simplify finding a relevant producer from the list of clients, “Search criteria” text field is added. It allows to type in a search term. Displayed entries are eliminated according to the search word after every keyboard key press in the “Search criteria” text box. X-road member class, member code and subsystem code can be used as search criteria, as well as the words in description column.

Refresh producersSave active producers

Search criteria

akt

	Producer	Description
<input checked="" type="checkbox"/>	COM : 11333578 : aktorstest-db01	Aktors OÜ
<input checked="" type="checkbox"/>	COM : 11333578 : misp2-soap-service-v6	Aktors OÜ
<input type="checkbox"/>	COM : 11333578 : aktorstest-db-v5	Aktors OÜ
<input type="checkbox"/>	COM : 11333578 : aktorstest-v5	Aktors OÜ

The producer name column format is the same as described in chapter 3.1 E-service management.

In order to add a producer to the system, select the desired producer's checkbox and it will be added immediately to the producers list.

3.1.2 Refreshing organisation's allowed services

Refreshing a query list is done on the producer's form it belongs to. To get the list of the producers see the beginning of paragraph 3.1.1. Refreshing producer services differs slightly between X-road version 6 and version 5 portals.

X-ROAD VERSION 6 PORTAL

After selecting a producer by clicking on the link in producer table "Producer" column, user is directed to the producer's list of services. After adding a new producer, the list is empty. It can be populated by clicking on "From security server (allowed)" button. The system then queries the list of allowed services to current client from security server and displays it as shown below.

The screenshot shows the 'Producer' form in the X-Road Version 6 Portal. The form has a 'WSDL source' section with four radio buttons: 'Security server' (selected), 'File upload', 'URL', and 'Service URL-s'. Below this is an 'Options' section with a checked checkbox for 'Only allowed services'. There are two buttons: 'Update services list' and 'Update selected services forms'. Below the form is a table with three columns: 'File download', 'ee-dev:COM:11333578:aktorstest-db01:fileDownload:v1', and 'Generated to database 03/06/2019 20:51:11'. The table has three rows, each with a 'Check all' checkbox on the right.

File download	ee-dev:COM:11333578:aktorstest-db01:fileDownload:v1	Generated to database 03/06/2019 20:51:11	Check all
File download	ee-dev:COM:11333578:aktorstest-db01:fileDownload:v1	Generated to database 03/06/2019 20:51:11	<input type="checkbox"/>
File Download (MTOM)	ee-dev:COM:11333578:aktorstest-db01:fileDownloadMTOM:v1	Generated to database 03/06/2019 20:51:11	<input type="checkbox"/>
File Upload	ee-dev:COM:11333578:aktorstest-db01:fileUpload:v1	Generated to database 03/06/2019 20:51:11	<input type="checkbox"/>

When source is selected and required fields filled then the button "Update services list" will update services list and button "Update selected services forms" updates services forms.

There are four ways to update the services list and forms:

- Security server – Refreshes services list from security server. If "Only allowed services" is checked then only services that are allowed for the client will be refreshed. If it is not checked then the whole services list will be loaded.
- File upload – refreshes services list from selected WSDL (for SOAP) or OpenAPI (for REST) file.
- URL – the WSDL or OpenAPI file is downloaded from given URL
- Service URL-s – only forms can be updated with this option. Selected services forms will be updated based on corresponding URL-s entered in the table

X-ROAD VERSION 5 PORTAL

In order to refresh the services list (shown above), click on the button „Update selected services forms“ and the system will then request open queries for the active unit's selected producer and display the results.

SERVICE REMOVAL DIALOG

When refreshing the list of services in both, X-road version 6 and version 5 portals, if services are found, which previously were in the list, are missing in the new list acquired from either the security server or WSDL, the option to remove these missing services is presented:

The following services, which are currently in the list of services, are not allowed in the security server.

Do you want to remove them from the list of services?

- ✖ changeAddress.v1
- ✖ fileDownload.v1

Yes

No

If “Yes” is chosen, the services are removed, including their form descriptions, XSLs (which are applied specifically to the service being removed), query permissions and everything else linked to the services, except for entries in the service history.

3.1.3 Form descriptions update (addition or modification).

In order to design an e-service input/output form in MISP2 the XForms standard has been introduced for SOAP services and HTML forms for REST services. Consequently every e-service must have an input/output forms description, which describes that specific forms user interface and data structure (SOAP/REST queries). MISP2 application uses Orbeon XForms engine for SOAP forms and custom engine for HTML forms. You can load the XForms description into the portal from the internet or create a new one using XForms generator in MISP2 portal. XForms generator takes producers WSDL/OpenAPI description as an input. Producers WSDL descriptions are accessible through X-Road from the corresponding producer. Forms generated by the generator are saved to MISP2 database automatically.

In order to update forms, go to the producers open service list form (see above). Select the services you wish to update by checking the box on their right and enter the URLs to the places where the forms descriptions are located. If the above is done, press the button „Update selected services forms” You will be notified about the success or failure of the saving process.

XForms refreshed (changeAddress.v1)
XForms refreshed (fileDownload.v1)
XForms refreshed (fileDownloadMTOM.v1)
XForms refreshed (fileUploadMTOM.v1)
XForms refreshed (isikOtsing.v1)

3.1.4 Generating form description from WSDL

It is possible to generate form description using WSDL description.

To generate an form description in X-road version 5 portal, select the desired queries and then click the button “Update selected services forms “. The system will get the WSDL from selected source and generate form description according to it. The resulting forms are then saved to the database and URL row will be set to “Generated to database”, in order to mark its existence.

3.1.5 Viewing form description

To view form descriptions first go to the producers open services list form (see above).

Ametikohad	aar.ametikohad.v1	▶	Genereeritud andmebaasi 30.10.2012 09:14:46	□
------------	-------------------	---	---	---

By clicking on the query name the system will display the form description form, which contains form description of the service and short note that is shown to user as a quick tip during form execution:

[← Back](#)

Note

```
1 <?xml version="1.0" encoding="UTF-8"?>
2 <xhtml:html xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
3   xmlns:xhtml="http://www.w3.org/1999/xhtml"
4   xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/"
5   xmlns:xforms="http://www.w3.org/2002/xforms"
6   xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
7   xmlns:events="http://www.w3.org/2001/xml-events"
8   xmlns:xsd="http://www.w3.org/2001/XMLSchema"
9   xmlns:xtee="http://x-tee.riik.ee/xsd/xtee.xsd"
10  xmlns:xrd="http://x-rd.net/xsd/xroad.xsd"
11  xmlns:aar="http://producers.aar.xtee.riik.ee/producer/aar">
12 <xhtml:head>
13   <xhtml:title xml:lang="et">Ametikohad</xhtml:title>
14   <xforms:model>
15     <xforms:instance id="ametikohad.input">
16       <SOAP-ENV:Envelope SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/">
17         <SOAP-ENV:Header>
18           <xtee:asutus/>
19           <xtee:andmekogu>aar</xtee:andmekogu>
20           <xtee:isikukood>EE</xtee:isikukood>
21           <xtee:id/>
22           <xtee:nimi>aar.ametikohad.v1</xtee:nimi>
23           <xtee:amet/>
24           <xtee:toimik/>
25           <xtee:autentija/>
26           <xtee:ametniknimi/>
27         </SOAP-ENV:Header>
28         <SOAP-ENV:Body>
29           <ns5:ametikohad xmlns:ns5="http://producers.aar.xtee.riik.ee/producer/aar">
30             <keha>
```

Save

You can change form description and note description and save the changes made. Clicking on the “Back” button bring you to the list of this producer’s services.

3.2 ACTIVE AND COMPLEX PRODUCERS AND THEIR SERVICES EXPORT/IMPORT

3.2.1 Export

Open tab “Services” and click on button “Export services”. Choose appropriate active and complex producers wholly or only some of their services and click on button “Export chosen services”.

Then an opportunity arises to download file in zip format, which contains all the chosen services forms and also information about those services and their corresponding active and complex producers.

3.2.2 Import

Open tab "Services" and click on button "Import services". Click on button "Browse" and from opened file dialog choose file in zip format to which services are exported. Click on button "Upload zip file with services".

Then a chosen zip file with services is uploaded to the server and user is represented with an opportunity to choose from those services which services exactly will be imported. For chosen services their forms and information about them will be imported and their corresponding active and complex producers will be added or updated.

For each service it is reported whether it already exists in database. If it exists, then when it is imported, it will be updated. If it does not exist, then it will be added on import.

3.3 XSL STYLESHEETS MANAGEMENT

XSL style sheets can be used to introduce miscellaneous changes and additions to the services' XForms form, e.g. adding a „debug" button to the form for SOAP XML. Stylesheets can be either global (applicable to all producers' services) or service based (add information to XForms description for given service). Only portal managers and developers can manage XSL style sheets. In order to manage a style sheet select „XSL" from the menu after which system will display style sheet's filtering form where you can search required style sheets.

XSL filter conditions

Stylesheet name

Producer

Service

Search

Found stylesheets

Stylesheet name	Producer	Service	In use
attachments		-- All services --	
attachments	-- All producers --	-- All services --	✓
debug	-- All producers --	-- All services --	✓
debug2	-- All producers --	-- All services --	
debug_xroad	-- All producers --	-- All services --	
headers	-- All producers --	-- All services --	✓
http://pub.e-tervis.ee/standards2/Standards/3.0/XSL/main.xsl	-- All producers --	-- All services --	
i18n	-- All producers --	-- All services --	✓
orbeon	-- All producers --	-- All services --	✓
rets-teenused	rets-complex	-- All services --	✓

Add new stylesheet

You can add new style sheets by clicking the button „Add new stylesheet” for more details see next paragraph.

3.3.1 Adding an XSL stylesheet

To add a XSL style sheet you first have to be on the style sheet filter page, where you'll click the button „Add new stylesheet”, after which the system will display style sheets change/addition form

Stylesheet name	<input type="text"/>
In use	<input type="checkbox"/>
Producer	-- All producers --
Service	-- All services --
Form type	HTML
Priority	<input type="text"/>
Stylesheet URL	<input type="text"/>
XSL	<div>1</div>

Refresh XSL contents from URL

Save

Fill in the following parameters (* marks fields that are required).

- **Name (*)** – name of the style sheet. It is recommended that it describes the intended purpose of the style sheet.
- **In use** – shows, if the style sheet is in use
- **Producer** – name of the producer, which can use this style sheet. All producers are selected by default.
- **Service** – name of the service, where this style sheet is used. A producer must be selected in order to choose services. All services are selected by default.
- **Form type** – shows, if this style sheet is applied on XForms (HTML) or PDF (used to save service results as PDF file).

- **Priority** – style sheets are applied in a specific order. Priority is used to mark importance over other style sheets. If two or more style sheets have the same or no priority, then they are applied using the style sheets name.
- **Stylesheet URL (*)** – an address, where style sheets contents are located. After entering the address, the contents of the XSL file can be loaded into the text area named „XSL” using the button „Refresh XSL contents from URL”. Before the contents are actually inserted to the field, it is validated and if everything is ok it is loaded, if any errors arise, the error message is shown instead.

After you have inserted all required parameters, you can save the data by clicking the button „Save”, after which a new stylesheet will be added to the system or error messages are displayed.

3.3.2 XSL style sheets changing (viewing)

In order to change/view a style sheet use XSL filter form to find required XSL style sheet. You can view/change a stylesheet by clicking on its name in the search results. After applying all changes, you can save them by clicking the button „Save”.

XSL contents are loaded automatically on the XSL style sheet form, meaning there is no need to click the „ Refresh XSL contents from URL” button. If the user inserts style sheets data, including style sheet URL and presses the button „Save”, the system will load the Xsl description from the given URL and saves all the data to database. If XST contents have been changed but URL is left untouched and button „Refresh...” is not specifically pressed, then XSL content is saved using the value of the text area instead the original from the URL preserving users’ changes made to the Xsl.

3.3.3 XSL style sheet deleting

To delete a stylesheet, open the Xsl changing form (see above) and press the button











A red rectangular button with the word "Delete" in white text.

4 PERMISSION MANAGER

4.1 USER GROUPS AND QUERY RIGHTS MANAGEMENT

In this chapter we are going to look into user groups' management – adding, deleting and changing. User groups can be managed only by portal managers and permission managers. In order to manage a user group select „Groups” from the main menu after which the system will display a list with all user groups:

User groups

aktorsi stuff		
asd		
koolitus		
test		
test_eng		
uus22		

Add new

In case of *universal and organization portal* where only one organization is bound to the portal (organization managing the portal) and units can be bound to it, it is possible to manage groups globally and locally. Globally managed groups are managed in organizations rights and they are visible to all units using the portal. Global groups' query rights can only be set in a user role bound to the organization. Every unit can manage global groups' members separately without any collision with other units. Unit's managed groups are groups which are defined in the unit's scope. Group management in the unit's scope means that the user doing the management has to be in a role bound to that unit. Unit's groups and their query rights are not visible to other units or the organization.

4.1.1 Creating user group

In order to create a user group, press the button „Add new”, after which an input form will be displayed:

Edit group

Name

Save

Group name is the only and mandatory field that has to be filled when creating a new group. Group name must be unique in the unit. After creating the new group you will be redirected to group list page.

4.1.2 Changing user group

In order to change user group select the group you want to change from the group list by clicking on its name. Then the system will display the groups' management form where you can change the groups' name. Group name has to be unique in the unit's scope.

Edit group uus22

Name

uus22


Save

Delete

4.1.3 Removing user group

To remove user group go to the user group management form (see above) where you can press the button „Delete“. When pressed you will be asked for confirmation and once confirmed the group will be deleted. If you refuse the group will not be deleted.

4.1.4 Viewing and changing groups' query permissions.

To add query permissions to a group, select the tab „Groups“ from the menu, after which the system will display group list. Choose the group whose query permissions you want to change/view and click on the button  on that groups' row. System will display that group's query rights in the currently active unit.

Service permissions of group v6

Save

Is allowed	Is hidden	Service description	Service short name
Aktors OÜ (aktorstest-db01)			
<input type="checkbox"/>	<input type="checkbox"/>	File download	ee-dev:COM:11333578:aktorstest-db01:fileDownload:v1
<input type="checkbox"/>	<input type="checkbox"/>	File Download (MTOM)	ee-dev:COM:11333578:aktorstest-db01:fileDownloadMTOM:v1
<input type="checkbox"/>	<input type="checkbox"/>	File Upload	ee-dev:COM:11333578:aktorstest-db01:fileUpload:v1
<input type="checkbox"/>	<input type="checkbox"/>	File Upload (MTOM)	ee-dev:COM:11333578:aktorstest-db01:fileUploadMTOM:v1
<input type="checkbox"/>	<input type="checkbox"/>	Loading of classifiers	ee-dev:COM:11333578:aktorstest-db01:loadClassification:v1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Person details query	ee-dev:COM:11333578:aktorstest-db01:personDetails:v1
<input type="checkbox"/>	<input type="checkbox"/>	Person representation check	ee-dev:COM:11333578:aktorstest-db01:personRepresent:v1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Persons List query	ee-dev:COM:11333578:aktorstest-db01:personList:v1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unit representation check	ee-dev:COM:11333578:aktorstest-db01:unitRepresent:v1
<input type="checkbox"/>	<input type="checkbox"/>	Unit validity check	ee-dev:COM:11333578:aktorstest-db01:unitValid:v1
<input type="checkbox"/>	<input type="checkbox"/>	Check all this producers services	
Aktors OÜ (misp2-soap-service-v6)			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Request logging service	ee-dev:COM:11333578:misp2-soap-service-v6:logOnly:v1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	User allowed methods	ee-dev:COM:11333578:misp2-soap-service-v6:userAllowedMethods:v1
<input type="checkbox"/>	<input type="checkbox"/>	Check all this producers services	
X-tee v6 complex producer			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Person complex service	aktorstest-v6-complex.person-complex
Subqueries :			
ee-dev:COM:11333578:aktorstest-db01:personList:v1			
ee-dev:COM:11333578:aktorstest-db01:personDetails:v1			

In X-road version 6 portal, service short name column consists of X-road instance, member class, member code, subsystem code, service code and service version fields separated by a colon. Producer name is followed by subsystem code in parentheses.

In this query list, you can select checkboxes in „Is allowed” column to allow execution of that specific query in a given groups’ rights. Groups of queries can be hidden and shown. After selecting all desired queries press the button „Save” to save changes.

In the case of universal or organization portal: Since you can't change global groups' permission rights in the scope of the unit, you can only view groups' query permission rights (tick denotes checked and empty field denotes unchecked):

Service permissions of group globaalne

Is allowed	Is hidden	Service description	Service short name
Phonebook service producer			
			aktorstest3.phoneListByPin.v1
Test database for xroad ver.5 doc/literal style			
<input checked="" type="checkbox"/>		Change Address	aktorstest.changeAddress.v1
		File download	aktorstest.fileDownload.v1
		File Download (MTOM)	aktorstest.fileDownloadMTOM.v1
		File Upload	aktorstest.fileUpload.v1
		File Upload (MTOM)	aktorstest.fileUploadMTOM.v1


4.1.5 Hiding allowed queries from the user

The aim of hiding open queries from the user is to hide queries which are used by complex queries. To hide queries navigate to the groups' permission management form (see above) and check the checkbox in the column „Is hidden” in the desired rows of the queries and press „Save”.

4.1.6 Removing permission rights from group

Removing permission rights is basically same as setting them (see 4.1.4Error! Reference source not found.) except when removing permission rights you should uncheck the box instead of checking it.

4.1.7 Viewing user groups' members and adding/removing users to/from a group

Firstly navigate to the user groups' management form (see Error! Reference source not found. beginning). Then select group and click on the button  in its row, after which the system will display all the users in a list. You can add or remove users from a group by checking or un-checking the checkbox next to the user's name.

Members of group uus22

Save

Is member	Users
<input type="checkbox"/>	Jones Tester (EN11111115)
<input type="checkbox"/>	Jones Tester (EN11111114)
<input type="checkbox"/>	KAROL KARTAU (EE [REDACTED])
<input checked="" type="checkbox"/>	Marti Pillo (EE [REDACTED])
<input checked="" type="checkbox"/>	MIHHAIL KORNÕŠEV (EE [REDACTED])
<input checked="" type="checkbox"/>	Mirjam Võsaülane (EE50708319990)
<input type="checkbox"/>	RAIGO LINNA (EE [REDACTED])
<input type="checkbox"/>	Check all

Save

4.2 USER ACCOUNT MANAGEMENT

Portal managers and permission managers can manage user accounts. To manage user accounts select the tab „Users”, after which the system will display a form to search users and a button to add new users:

Users filter conditions

Social security number	-- All countries --	
Givenname		
Surname		
Filter all users	<input type="checkbox"/>	

Search

Add new user

4.2.1 Adding a new user account

To add a new user account press the button „Add new user”, thereupon you will be redirected to user account's form

User data

Social security number	<div>Estonia</div>	<div>39876543210</div>
Givenname	<div></div>	
Surname	<div></div>	
E-mail	<div>aadress@domeen.ee</div>	
Roles	<div><input type="checkbox"/> User</div> <div><input type="checkbox"/> Permission manager</div> <div><input type="checkbox"/> Services manager</div> <div><input type="checkbox"/> Portal manager</div>	
Profession	<div>Profession in free text</div>	

User groups

aktorsi stuff	<input type="checkbox"/>	<div></div>
asd	<input type="checkbox"/>	<div></div>
koolitus	<input type="checkbox"/>	<div></div>
test	<input type="checkbox"/>	<div></div>
test_eng	<input type="checkbox"/>	<div></div>
uus22	<input type="checkbox"/>	<div></div>

Save

- **PIN** – User's identification code has to be unique in the entire portal and it must be valid.
- **Given name** – user's given name
- **Surname** – user's surname
- **Father's name** – father's name

- **E-mail** – e-mail address, which is used to notify user about changes made to their account. E-mail is bound to the active unit and is not global in the portal; it should satisfy common e-mail rules (can't contain illegal characters etc).
- **Roles** – user's role in the active unit. One user can have 0 to many roles; if no roles given, then no binding is done with the active unit. Since group affiliation and profession are bound with the active unit as well, neither is saved if no role selected. If you are not in the portal manager's role you can't set others or yourself as portal manager. For more information about roles see the respective chapter in this document.
- **Profession** – profession is freely chosen „position“ for the user, which he/she fills in the unit. Profession could be for instance „developer“ or „doctor“.
- **User groups** – user groups are groups which are visible in the unit. You can manage groups affiliation here or in the group's management (see **Error! Reference source not found.**) where you can add multiple users at once.
 - **Deadline** determines when user's group affiliation ends. After the deadline has passed the user can no longer see or execute queries set to that group. You can select a deadline using calendar widget.

User groups

aktorsi stuff	<input type="checkbox"/>	<input type="text"/>
asd	<input type="checkbox"/>	<input type="text"/>
koolitus	<input checked="" type="checkbox"/>	<input type="text"/>
test	<input type="checkbox"/>	
test_eng	<input type="checkbox"/>	
uus22	<input type="checkbox"/>	

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Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Also, for users with certificates you can generate passcode, that will conclude their authorization in the portal.

Once the form has been filled press „Save“, which binds the user with active unit and saves all the information entered into database, gives group permission rights and roles. If any errors occurred with concrete field, the label of that field will turn red and when hovering over it with your mouse, you can see the error message.

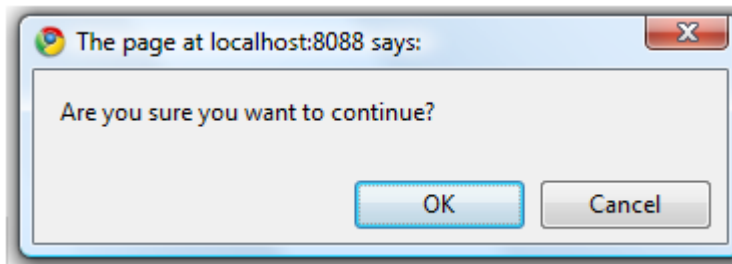
Social security number	<div>United Kingdom</div>	<div>1111116</div>
Givenname	<div>John</div>	
Surname	<div>Tester</div>	
E-mail	<div>aaddress</div>	

4.2.2 User account changing

To change a user account you firstly need to find the user you want to change, using user search form. Once you have found the user, you can open the user management form by clicking on the user's name, after which the system will display the user's data in form which was described in chapter 4.2.1. The main difference between user addition and changing is the fact that when changing the user, you can't change his/her id-code or country.

4.2.3 User account deletion

There are two ways to delete a user account. First of the two is done in portal administration mode (see chapter **Error! Reference source not found.**) using the button „Delete“. The other method is using the user's management form and pressing button „Delete“ on it after which the system will ask for your confirmation and once given it will try to delete the selected user from the portal.



However, if the user has query rights under the unit, you will be asked for additional confirmation.

Once you have confirmed the action, the user will be deleted. In case of the user has query rights in any other unit, you are not allowed to delete that user until all the query rights are removed.

User has service rights in another organization!

5 PORTAL MANAGERS

5.1 SERVICE MANAGEMENT

The same as 3.1

5.2 XSL STYLESHEETS MANAGEMENT

The same as 3.2

5.3 USER GROUPS MANAGEMENT

The same as 4.1

5.4 TOPICS

If portal settings allow usage of topics, queries are grouped according to topics rather than producers. If it is not allowed then no topics are used and queries are grouped according to producers.

Topics management enables basic CRUD functionality for topics and a way to manage which queries belong to which topic. Topic can be empty, meaning it can have no queries bound to it, in that case that topic isn't in use. Topic management can be done only by portal managers.

General settings

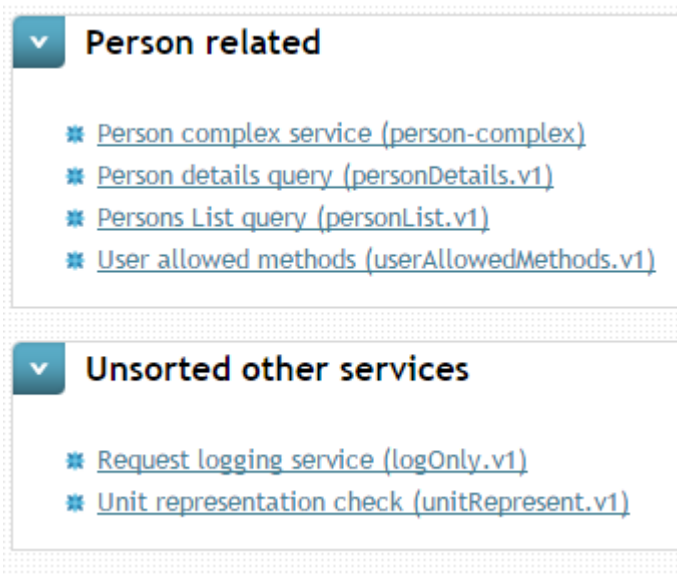
Topic short name	<input type="text" value="person_related"/>
Description (ET)	<input type="text" value="Isikuga seonduv"/>
Description (EN)	<input type="text" value="Person related"/>
Priority	<input type="text" value="1"/>

Set services which are bound with current topic:

Connected with theme	Service description	Service short name
Aktors OÜ (aktorstest-db01)		
<input type="checkbox"/>	File download	ee-dev:COM:11333578:aktorstest-db01:fileDownload:v1
<input type="checkbox"/>	File Download (MTOM)	ee-dev:COM:11333578:aktorstest-db01:fileDownloadMTOM:v1
<input type="checkbox"/>	File Upload	ee-dev:COM:11333578:aktorstest-db01:fileUpload:v1
<input type="checkbox"/>	File Upload (MTOM)	ee-dev:COM:11333578:aktorstest-db01:fileUploadMTOM:v1
<input type="checkbox"/>	Loading of classifiers	ee-dev:COM:11333578:aktorstest-db01:loadClassification:v1
<input checked="" type="checkbox"/>	Person details query	ee-dev:COM:11333578:aktorstest-db01:personDetails:v1
<input type="checkbox"/>	Person representation check	ee-dev:COM:11333578:aktorstest-db01:personRepresent:v1
<input checked="" type="checkbox"/>	Persons List query	ee-dev:COM:11333578:aktorstest-db01:personList:v1
<input type="checkbox"/>	Unit representation check	ee-dev:COM:11333578:aktorstest-db01:unitRepresent:v1
<input type="checkbox"/>	Unit validity check	ee-dev:COM:11333578:aktorstest-db01:unitValid:v1
<input type="checkbox"/>	Check all this producers services	
Aktors OÜ (misp2-soap-service-v6)		
<input type="checkbox"/>	Request logging service	ee-dev:COM:11333578:misp2-soap-service-v6:logOnly:v1
<input checked="" type="checkbox"/>	User allowed methods	ee-dev:COM:11333578:misp2-soap-service-v6:userAllowedMethods:v1
<input type="checkbox"/>	Check all this producers services	
X-tee v6 complex producer		
<input checked="" type="checkbox"/>	Person complex service	aktorstest-v6-complex.person-complex
<input type="checkbox"/>	Check all this producers services	
<input type="checkbox"/>	Check all	

In X-road version 6 portal, service short name column consists of X-road instance, member class, member code, subsystem code, service code and service version fields separated by a colon. Producer name is followed by subsystem code in parentheses.

In case of the topic shown on the screenshot above, grouping of queries is done in the following way:



“Unsorted other services” tab consists of services that do not belong to any topic, but are enabled under group rights. Each link displays service description followed by its technical name in parentheses. The latter consists of service operation name in WSDL and service version separated by a dot.

5.5 CLASSIFIERS MANAGEMENT

Classifiers can be managed by portal managers. MISP2 application requires at least 1 classifier for each language used. That classifier is country names and codes classifier. Without it, it is not possible to create or search users, since both these forms use those classifiers. Pressing on the classifier's name shows you the content of that classifier as XML. In order to reload a classifier, click on the name of the desired classifier.

Classifiers loaded to portal:

Systemic classifiers

xtee.riigid
xroad.countries
maakonnad
asulad
ehak
vallad
tis.riigid

Producers classifiers

aktorstest.riigid		
-----------------------------------	--	--

Load new classifier

Button „Load new classifier” allows you to load classifiers from producers.

5.6 VIEWING SERVICE HISTORY

To view service history of all portal users select the tab “Service history”. The system will display the service history filter with the following fields: “Between” “Service name” and “User”.

Between -

Service name

User

Query id

Description	User	Query time	Id	Query time	Size
Retsepti vaatamine (arst) (rets.retseptide_loetelu_arst.v1)	RAIGO LINNA	01/28/2013 11:59:33.660	c6efde40-0472-4b0b-bb1d-c03984adbd6c	0.769	
Retsepti vaatamine (arst) (rets.arsti_erialad_list.v1)	RAIGO LINNA	01/28/2013 11:59:08.923	c6efde40-0472-4b0b-bb1d-c03984adbd6c	0.895	
List of persons (aktorstest.isikuteList.v1)	KAROL KARTAU	01/25/2013 16:29:42.996	fc60cb968d9d8c05a056a35c8f6cd353e5702a90	0.104	
Isiku andmete otsimine isikukoodi järgi (aktorstest.isikOtsing.v1)	KAROL KARTAU	01/25/2013 16:29:29.656	7a8590f2a8579d90e5d1f6d63ff0b65ecd149bae	0.171	
Search person by Id-code (aktorstest.isikOtsing.v1)	MIHHAIL KORNÕŠEV	01/25/2013 16:26:33.744	745bd834050cfee30b4132b94b20f8792decb7f4	0.163	
Isikute nimekirja teenus (aktorstest.isikuteList.v1)	MIHHAIL KORNÕŠEV	01/25/2013 16:26:22.238	7546b4731cd9078fc7ea7c748dc6cb406804161d	0.232	

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

5.7 UNITS MANAGEMENT

Units management allows portal manager to add new portal units and to remove or modify existing units.

5.7.1 View and search units

To find units registered in the portal you have to select the tab "units", which will display the unit search form with the input fields for unit name and registration code. When entering one of these parameters, the units are searched and displayed in a list. When opening the search form, automatically all the units are displayed in the result list.

Enter unit search criterias

Name

Registration code

Search

Units found:

[Aktors \(11333578\)](#)

Add new unit

5.7.2 Adding a new unit

New units can be added in portal manually. For this click on button "Add new unit" which opens the form where you can add data for the new unit. The name and registration code are required fields, and the registration code can not be changed after adding the new unit.

←Back

Name (ET)

Registration code

Save

Save and add permission managers

For saving data there are two options. "Save" button saves only the data of the new unit. And the button "Save and add permission managers" saves the data and forwards user to the page where you can manage access rights and you are assigned you automatically the role of representative of this unit. About managing unit's access rights see the topic 4. "Representative person" in MISP2 Guide for Business portal.

5.7.3 Changing units

To change units, click on the appropriate name, which opens the same form as when adding a new unit,

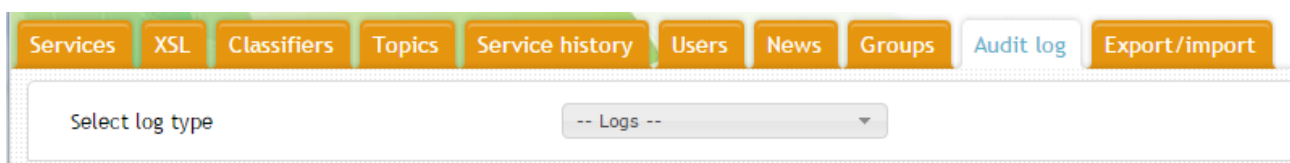
only now it is filled with unit data. Registration code can not be changed, this should be done by removing the existing unit and adding a new one.

5.7.4 Removing units

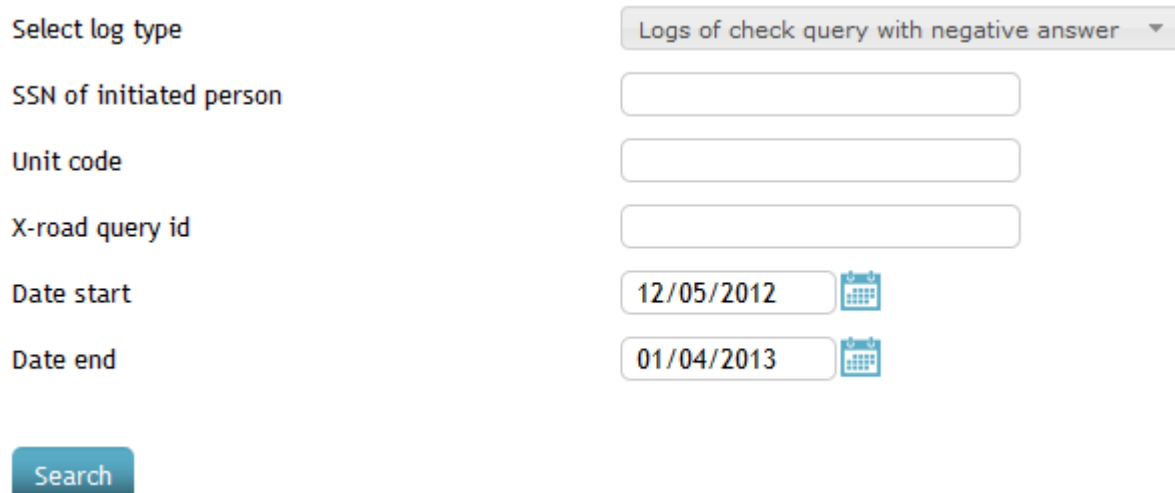
To remove the unit from the portal you must go to the same form as changing the unit data, and click on the "delete" button. This removes the unit and also all its relationships to other objects from the database.

5.8 AUDIT LOG

These logs are system logs; they represent actions made by users. These logs are only viewable to portal managers and are saved by meta-service that should be configured in the portal. By clicking the tab „Managers logs” on main menu you are shown a form with 1 select box from where you can select the type of log you want to see:



Once you have selected the type of a log you want to view, you are given an input form, which varies according to the log type. This form is used to filter logs. Once filled with desired parameters (empty fields are left out) and „Search” button pressed, the system will find and display filtered logs according to the parameters you set. For example, for „Logs of check query with negative answer” the search form looks like:



The table below describes all log actions in MISP2.

Action name	Log type name in filter	Description	User role
Manager added	Logs of managers actions	Adding permission manger or portal manager role to user	Portal manager
Manager deleted	Logs of managers actions	Removing permission manger or portal manager role from user.	Portal manager
Group added	Logs of groups actions	Adding new user group to portal	Portal manager, permisssion manager
Group removed	Logs of groups actions	Removing a user group from portal	Portal manager, permisssion manager
Person added to group	Logs of group person actions	User is added to a user group	Portal manager, permisssion manager
Person removed from group	Logs of group person actions	User is removed from a user group	Portal manager, permisssion manager
Permission added	Logs of group permission actions	Adding service permission to user group	Portal manager, permisssion manager
Permission removed	Logs of group permission actions	Removing service permission from user group	Portal manager, permisssion manager
Person added	Logs of person actions	New user account was added to portal	Portal manager, permisssion manager
Person removed	Logs of person actions	User account was deleted from portal	Portal manager, permisssion manager, administrator
Org added	Logs of portal/org actions	New organization or unit was added to portal	Portal manager, administrator

Org removed	Logs of portal/org actions	Organization or unit was removed from portal	Portal manager, administrator
Auth query control	Logs of auth query	Data about authorization query execution.	User

5.9 EXPORT/IMPORT

Portal managers are able to export and import portal configuration data from the form in “Export/import” tab. There are checkboxes to select different configuration data sets and buttons for data set export and import. In universal portals, there is also a dropdown-widget to select a single unit.

Choose data sets for export/import

Units + groups ☒

Persons belonging to groups ☒

Services belonging to groups ☒

Topics ☒

Services ☒

Export chosen data sets Specify unit for export All ▼

Browse... No file selected. Import chosen data sets from chosen file

5.9.1 Selectable data sets

Units + groups – Sub-organizations (units) of the main organization and user groups.

Persons belonging to groups – Associations between main organization/units and portal users, associations between user groups and portal users and users themselves. Depends on **Units + groups** being checked.

Services belonging to groups – Associations between groups and services. Depends on **Units + groups** being checked.

Topics – Portal topics and their respective associations with services.

Services – All main organization services in active and complex producers (similar to service export/import functionality in chapter 3.2).

5.9.2 Export

By selecting a single unit from “Specify unit for export” dropdown list in universal portal, it is possible to select only one unit for exporting. By default, all units are exported.

After clicking on “Export chosen data sets”, a zip-file is downloaded. That file contains data of all selected data sets and can be used to import that data to a different portal.

5.9.3 Import

The zip-file in previous chapter can be imported to an existing portal. Depending on portal type, the following export/import flows are possible:

- from Universal portal to Universal portal,
- from Organizations portal to Organizations portal,
- from Universal portal to Organizations portal. In that case units are not saved, but the associated users and groups are attached to the main organization.

Importing from Organizations portal to Universal portal is not allowed.

During the import, if a producer is selected that was not included in exported file, then importing this producer will be skipped.

Importing preserves associations between producers. In other words, if a producer import depends on a prior import of another producer, then the order of producer import is adjusted accordingly.

During the import, database entries are modified or added depending on whether the imported objects already exist in the database or not, this is detected based on the natural keys of the objects.