eSaw Plugin - User Manual

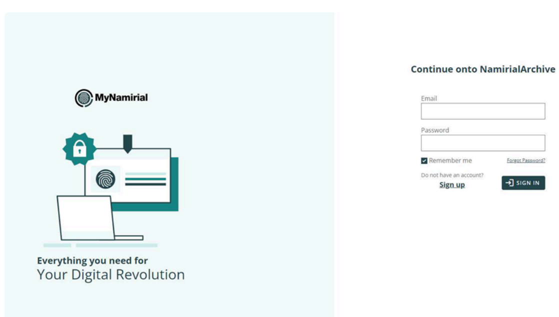
eSaw Plugin – Portal login

Once the service activation process has been completed, each customer will be provided with portal access credentials (the username in plain text and the asterisked password will be sent to the email indicated during provisioning, while in the PEC mailbox will be sent the password in plain text and the asterisked username), as well as the relevant access link, which leads to the following screen:

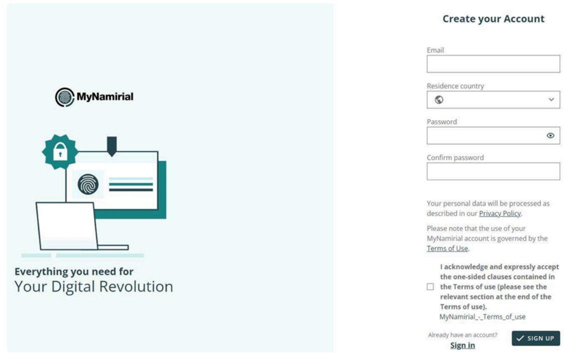
If you already had your login credentials, but no longer remember them, you can click on the link 'Forgot your password?', where you can reset your login credentials.

You can also activate the tick on "Remember password", so that you can save your credentials directly on the browser you are using to access the site.

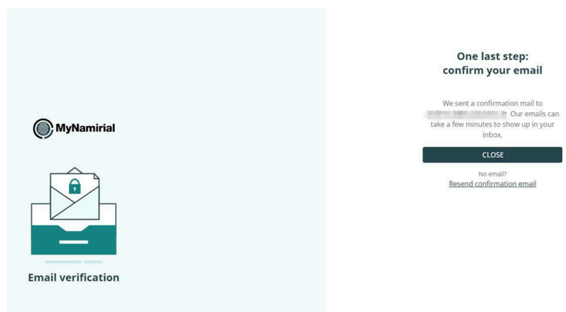
In addition, you can use the “MyNamirial login” button to access the system.



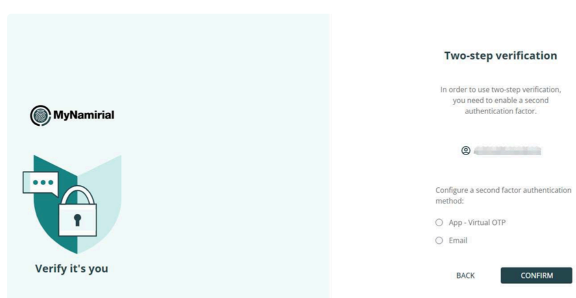
From this screen you can, in addition to the classic login options listed above, go to register a new MyNamirial login by pressing the "Sign up" button.



Once all of the required data is set, you can press again the button "SIGN UP" and the system will automatically send a confirmation email to the address specified. If you haven't received the first mail, you can press the "Resend confirmation mail" link to make the system try another time (notice that this mail could take some minutes to be sent/received).



In the email there will be only one big button that you have to press to confirm the mail address, then the system will open a new window in your browser, asking for the standard NamirialArchive credentials to link them to your new MyNamirial profile. After this step, you can no longer use standard authentication, and only MyNamirial login will be usable for the website user you have linked.

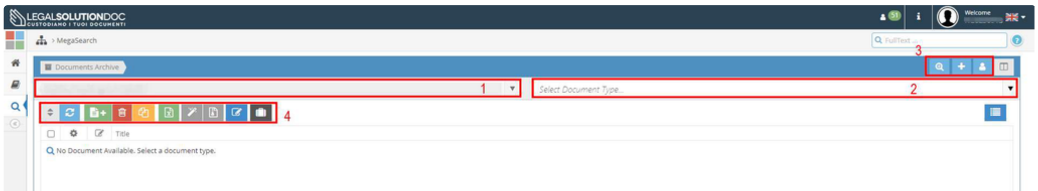


When the link will be complete, you will be automatically signed into the website home page. Now you can enter in your User Profile (click in the upper-right corner directly on your username, then select User Profile), and set if you want to enable Multi Factor Authentication (MFA) for your user. If enabled, at the next login you will be required to enter the second step verification code, either by email (it will be sent to the mail registered for the MyNamirial access), or by the virtual OTP app available for free, both for iOS and Android directly in their app store.

Remember that MFA is mandatory for SafeDocs service access.

eSaw Plugin – Website use

Once you have accessed the website, you will be landing on the following page:



As in the image, you can find:

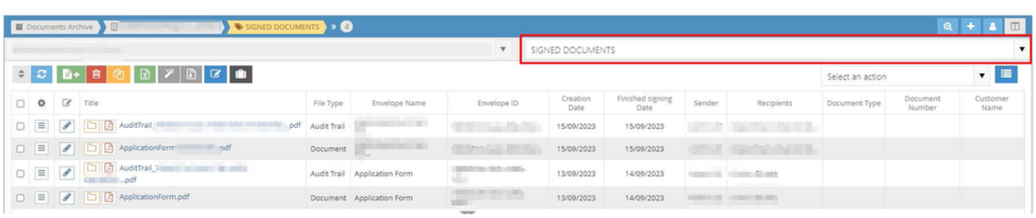
1. Dropdown menu with the possibility of selecting the Company in which you are searching files (only for users who have access to multiple Companies).
2. Dropdown menu to choose the Document Type you want to interact with.
3. Advanced Search and Display Preferences buttons.
4. Command buttons.

1 - Company dropdown menu

In this menu you can choose the Company you want to access. The selection is available only if the user with which you have accessed the website is enabled to access to more than one Company.

2 - Document Type dropdown menu

With this menu you can select the Document Type you want to access, to manage all of the documents stored within it

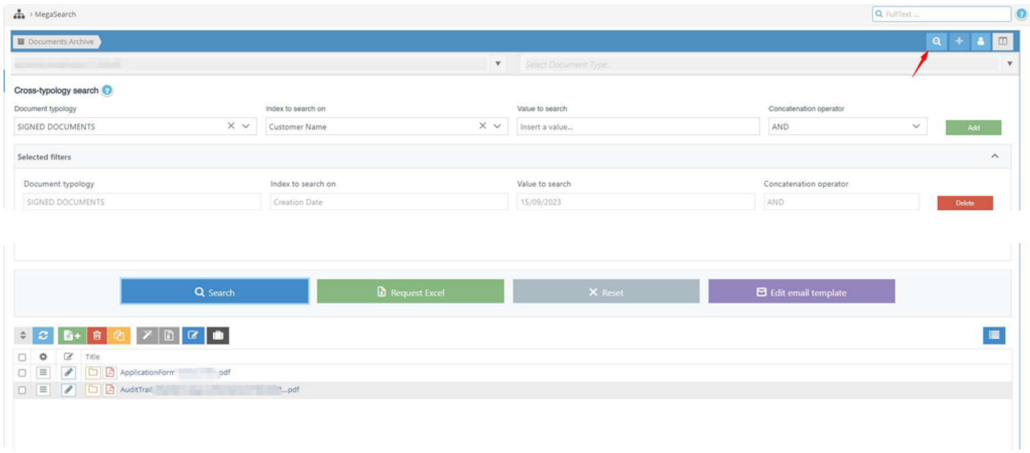


3 - Advanced Search and Display preferences

There are 3 buttons in the upper right corner of the interface that can activate Cross-typology search (magnifying glass icon), Advanced search (plus icon) and Display Preferences.

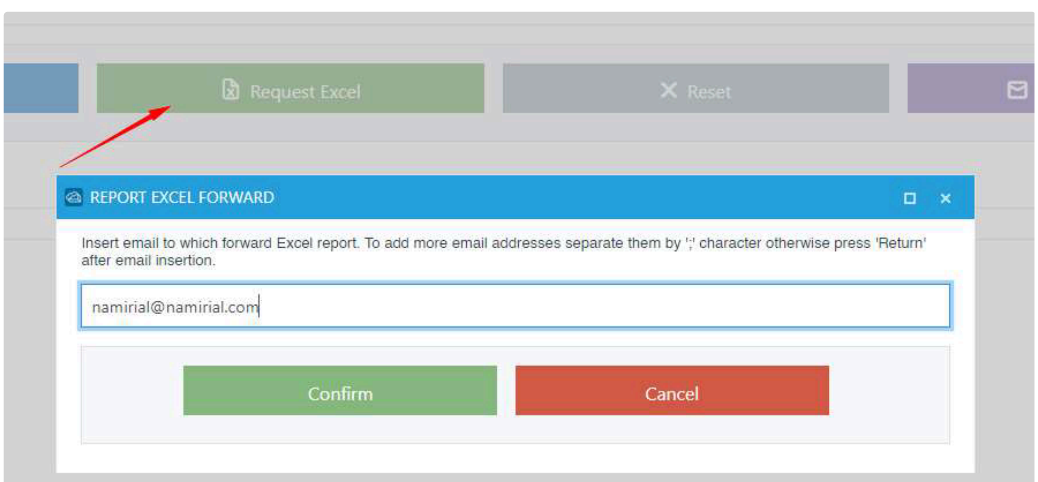
3.1 Cross-typology search

With Cross-typology search, you can set search values for one or more documents, even on different document types.

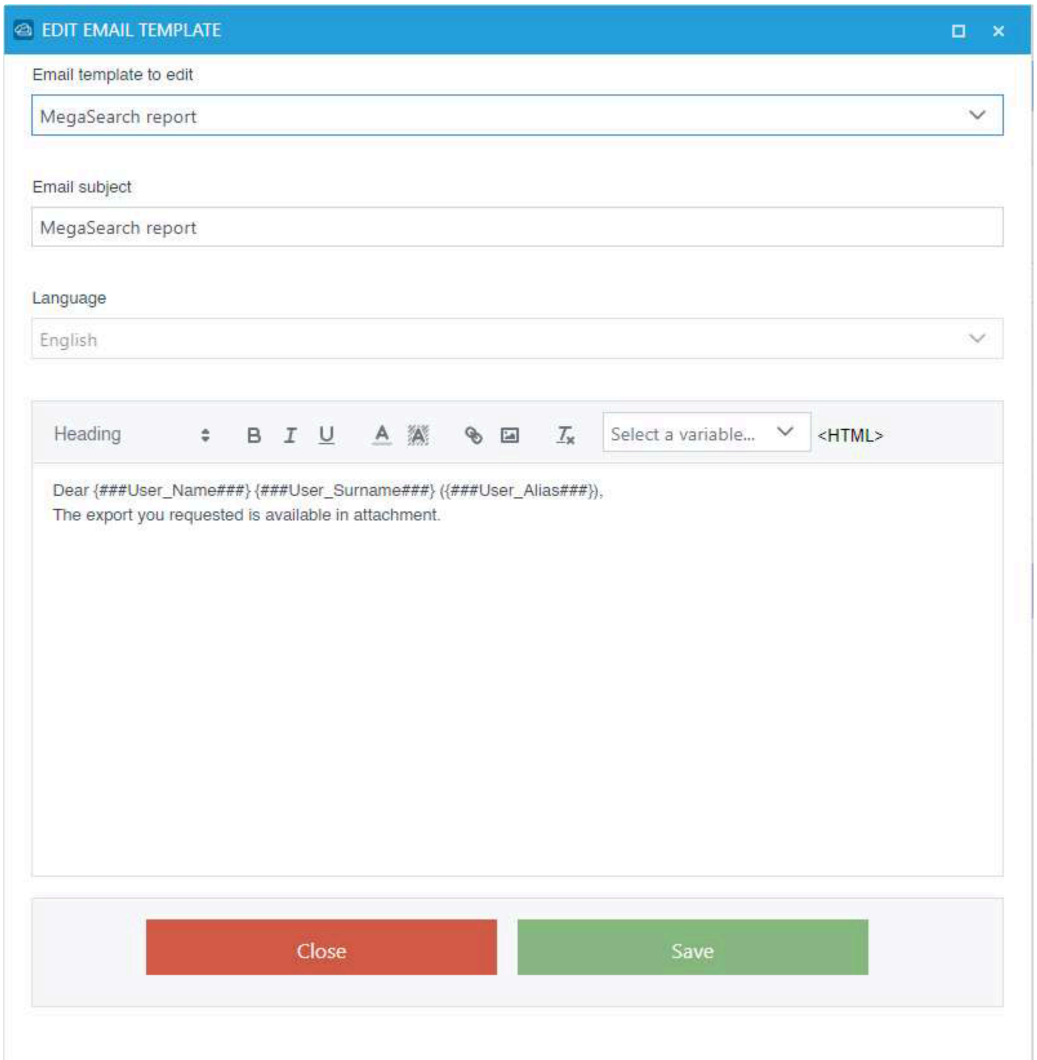


By clicking the button, you will see the screen as above, where you can specify search parameters by entering and adding multiple filters. To perform the search, you must indicate in the relevant fields on the screen the document type to be searched on, the index of the selected typology to be searched on, a search parameter within the specified index, and then select the Boolean operator for the following search conditions (AND or OR). Once the 4 fields have been filled in, simply click on the "Add" button to populate the "Selected filters" section, then it will be possible to fill in any other search conditions on different document types. Once the search parameters have been defined, press the "Search" button to check the results on the different document types.

You can also press the “Request Excel” button to receive an Excel file by e-mail, which will show all the indexes of the documents found by the search performed.



Also, with “Edit email template” you can select how to modify the mail that will be sent:

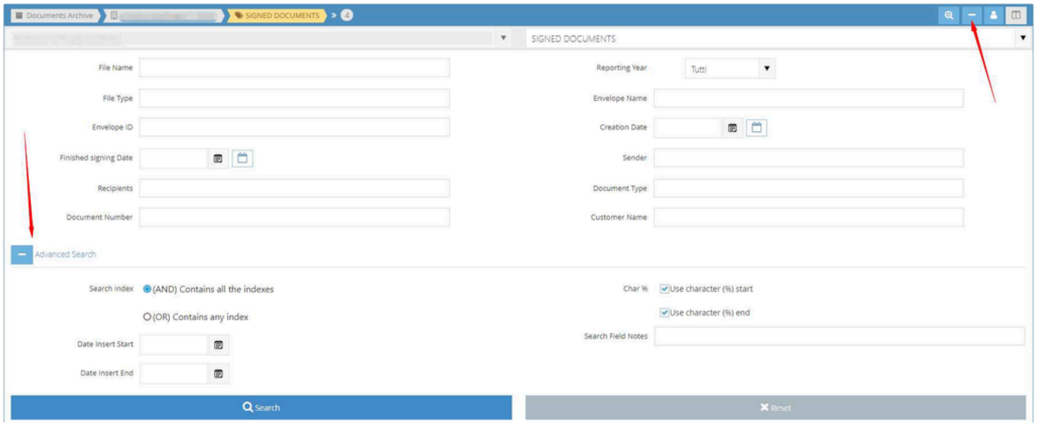


In the first dropdown menu there will be some standard mail templates already created, from which you can see some code strings that will be automatically filled in by the system when sending the communication. This strings will be populated, accordingly with the data from the user who sent the mail creation.

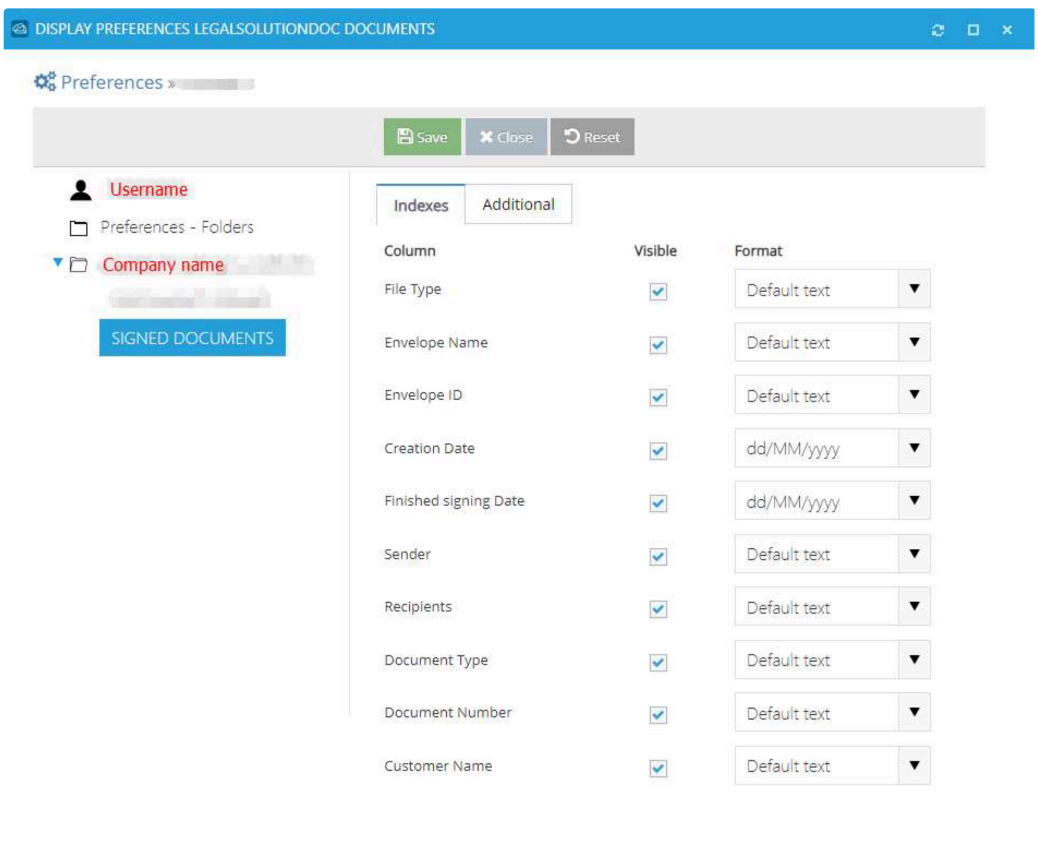
3.2 Advanced Search

With Advanced Search, it will be possible to search for documents with precision, filtering the results for each of the indexes of the selected document type.

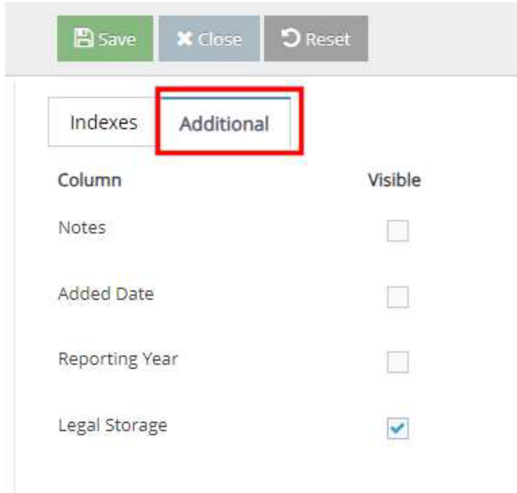
Moreover, by opening the additional panel at the bottom left corner (see image below), you will be able to specify additional details of the file(s) you are searching for, using Boolean operators, the date the document was entered into the system, using the wildcard "%" characters, or by searching in the notes entered on the stored document.



3.3 Display Preferences

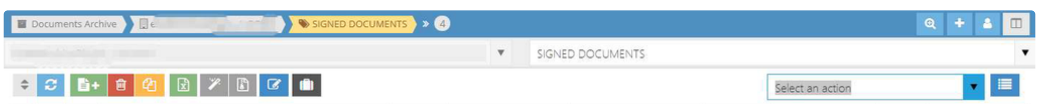


Clicking the button with the man icon, the window shown above will pop-up, and consent to customize the indexes you want to see on your screen for the selected document type. In the left column you can select and customize even more documental types if available for your company.



Clicking on the “Additional” tab, you can also choose if you want to show more system indexes, like for example the “Legal Storage” index, which will show an hammer icon in green if the document has been already correctly preserved, or in orange if the process of preservation is still running and in red if the file it’s still not entered in the preservation process.

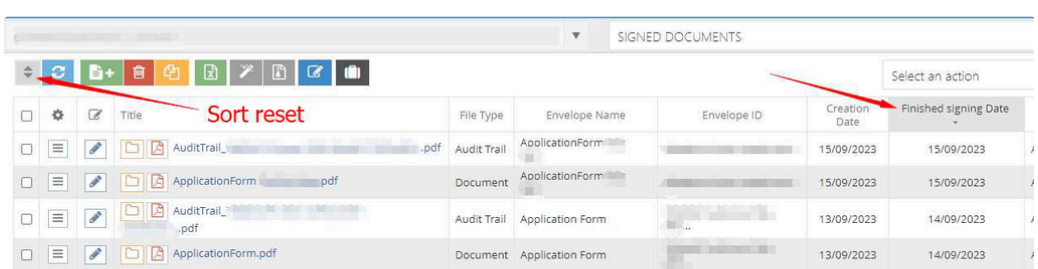
4 - Command buttons



From left to right, the interface shows some commands that can be used to import new documents or to interact with those already loaded in the selected document type. In the rightmost part then there is a drop-down menu for massive functionality.

Many of these commands are to be considered usable only in the event of purchasing further services. Below we will briefly describe all the commands, specifying which ones are useful if only the eSaw plugin is activated (identified by the letter "U"), and which ones require another active service for your company ("NU").

4.1 Cancel Sort documents (U)



With the button shown in the image, it is possible to reset the sorting set for the files in the grid. To sort the documents, simply click on the column headings of each of the available indexes. By clicking on the column heading several times, it is possible to switch between descending and ascending sorting.

4.2 New Document (NU)

This is the button to use when there is a need to manually load a document within the selected document type. Once the button is clicked, you will be prompted to manually compile all the indexes of the document type. In case of activation of the eSaw plugin only, this functionality is enabled, but has no reason to be used since the plugin automatically performs this procedure for each file to which all signatures have been affixed by eSaw workflow.

4.3 Delete Document (NU)

This button is used to delete archived (not preserved) files on the selected document type. As it only works on archived documents (red hammer icon), it’s not useful for the functioning of the eSaw plugin, which preserves documents by means of a quick automatism. For retained documents (green hammer icon), deletion is not possible, except by contacting dedicated support.

4.4 Move Document (NU)

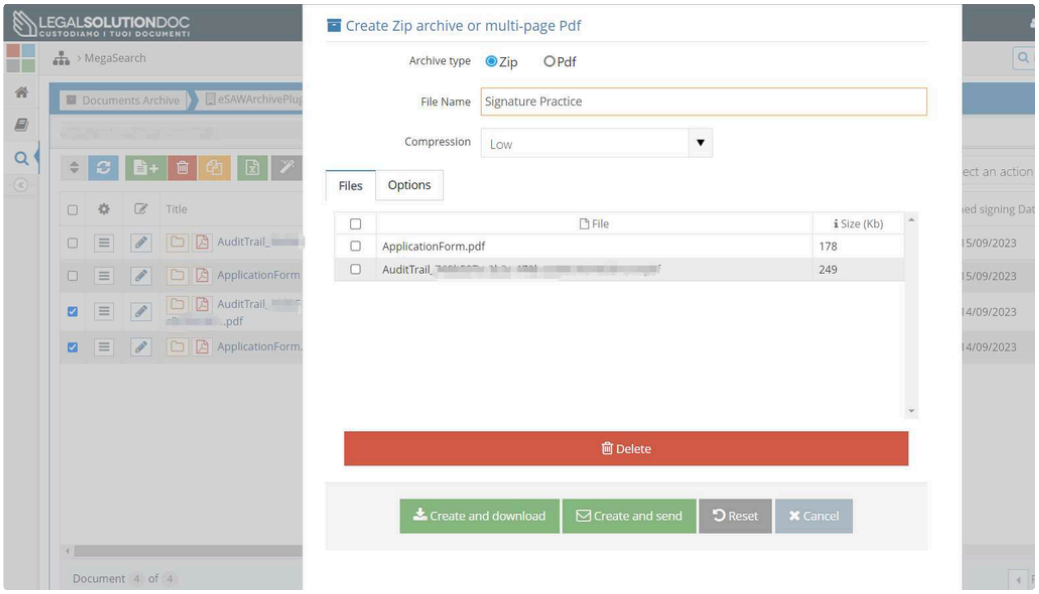
Command to move the selected document (if not preserved, see hammer icon) from one document type to another. When moving, you will be asked to fill in any different indexes of the destination document type.

4.5 Export to Excel (U)

By clicking on this button, it is possible to export a list of files preserved in the document type to an Excel spreadsheet, which will report all indexes (visible and not) of all documents. It is possible to enable the left tick for some documents before clicking on the button, to have a report of only the selected files.

4.6 Add Zip and Create Zip Archive (U)

These buttons are part of the same command: with the Add Zip Archive button, you can add the files selected in the grid (must be already selected, then press the button) to a temporary folder, then with the Create Zip Archive button you can select the option of the output of this command.



In this window you can choose if you want to create a ZIP file or a multi-page PDF that will be created by merging the files selected in their shown order, then select a name for the file resulting from this operation. The dropdown menu Compression is enabled only for ZIP file creation (if PDF is selected, then this menu will be not active), and consent the user to choose the ZIP compression rate.

With “Files” tab you can choose which file to be inserted in the ZIP (or PDF) result, and with “Options” tab you can add some notes to the resulting file.

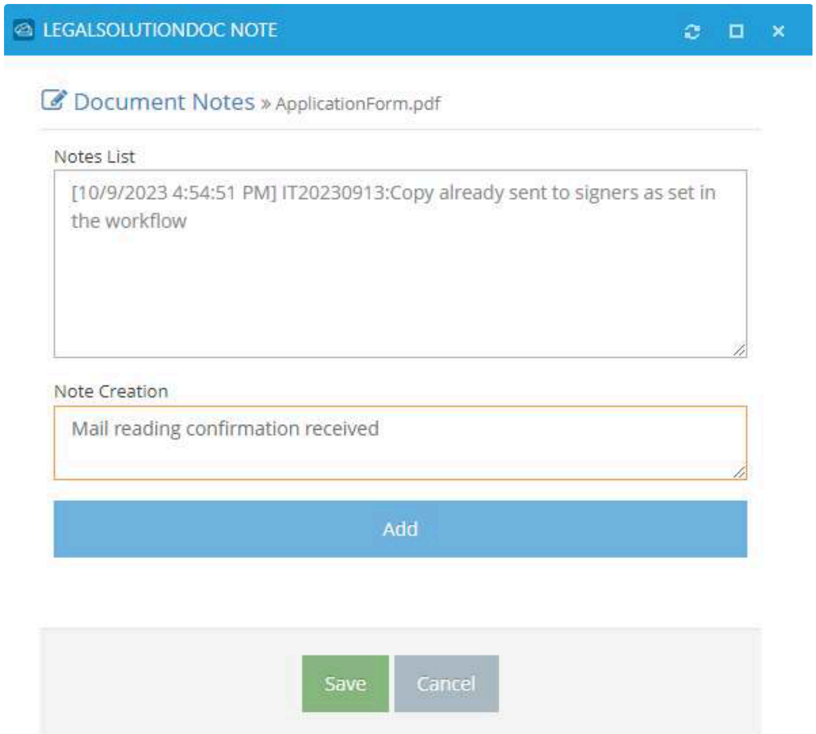
“Delete” button allows the user to delete a document from this temporary folder, while “Reset” button will clear all of the folder from the files put in this space.

The last step is choosing between “Create and download”, that will create the result file (ZIP or PDF) and save it locally on your computer, or you can choose “Create and send” (only for ECM users), which can create the file and then send it by mail.

4.7 New Note (U)

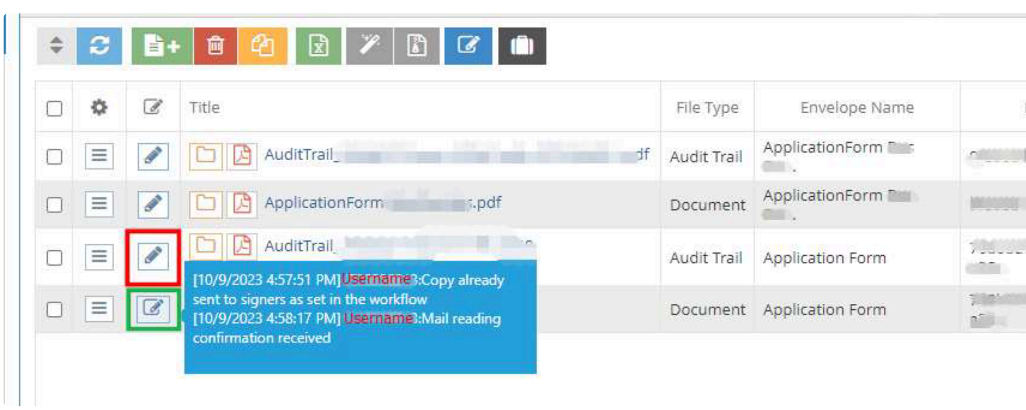
This command helps the user to insert a note to a specific document, that can be used with Advanced Search (section 3.2).

Selecting a document and pressing the button will bring up this window:



In the upper part (Notes List), you will see all of the notes already applied to the document if there were any, then in Note Creation you can insert the text you want to save as note, then press Add to confirm.

When a note is saved, in the grid you should notice a different icon as shown below:



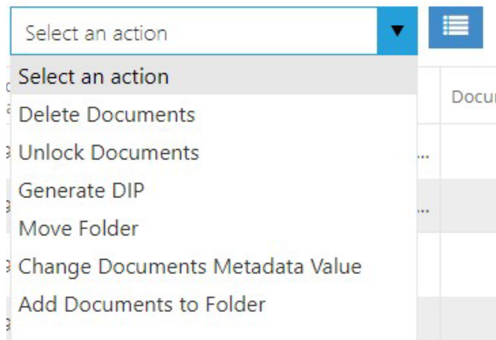
The icon highlighted in red is the document without a note, and the green highlight is the icon when a note is inserted. By placing the mouse on the icon, all the notes inserted will be displayed as a tooltip, with date and time of note append and the username who inserted the note.

4.8 Document Signing (NU)

This command is usable only if you have an ECM, and is used to send a document to be signed electronically to a specified user of the internal organization.

5 - Massive operations

With massive operations the user can select any amount of files and decide an action to be applied to all of this document. With the only eSaw Plugin activated, the only useful action is “Generate DIP”.



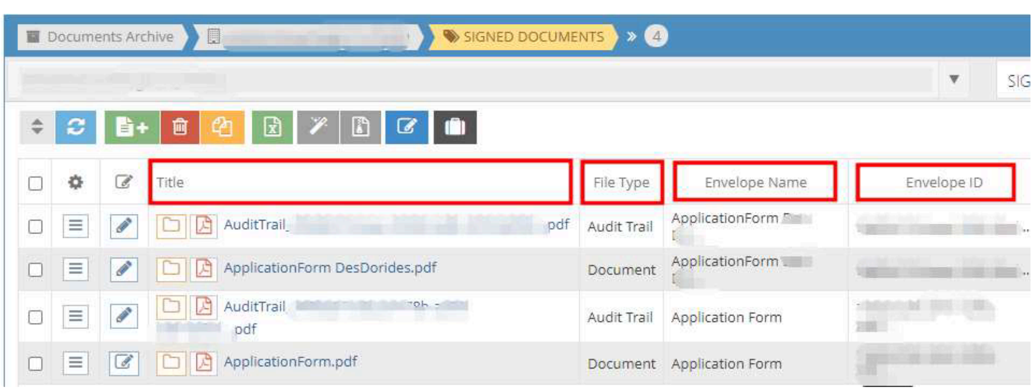
Selecting some documents and clicking the “Generate DIP” massive operation, will create a DIP file (Dissemination Information Package), which can be showed to any authority in the case of fiscal control, to prove that the file has been preserved correctly.

The resulting file will be a zip archive, which contains all of the original documents selected, and their time stamp.

6 - Grid actions

Directly from the grid we can find some useful commands that we will now look at individually.

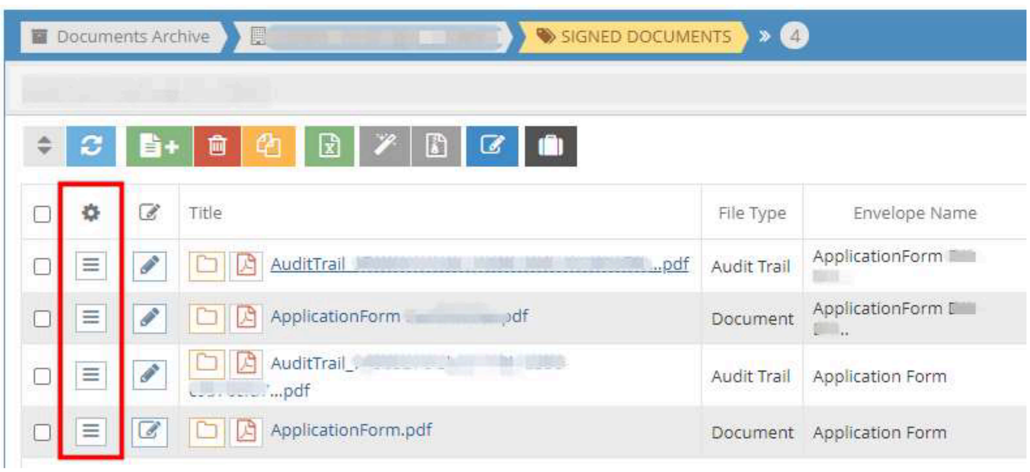
6.1 Grid titles



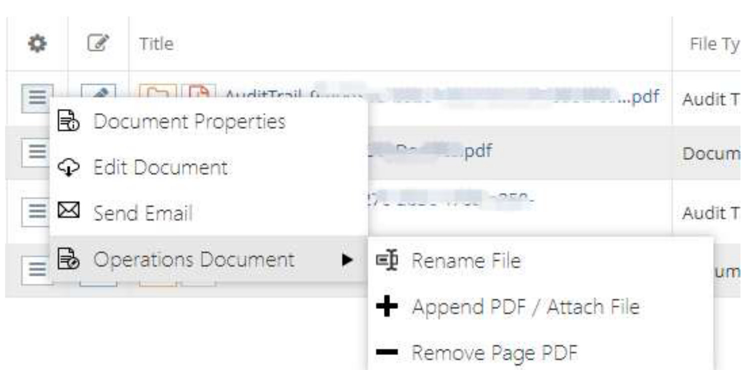
As seen in chapter 4.1, clicking on one of the grid’s titles related to the indexes of the selected document typology will change the order of the documents shown. When this happens, a little arrow will appear in the relative index title.

If the arrow points downwards, then the sorting is descending (largest to smallest), conversely if the arrow points upwards, the sorting is ascending (smallest to largest). Naturally, the same applies to text type fields, going in alphabetical order. To switch from ascending to descending, simply continue clicking on the title, and cycle through the 3 possibilities: ascending, descending or sorting off (no arrow shown).

6.2 Options button



Clicking on the button will show you different commands:

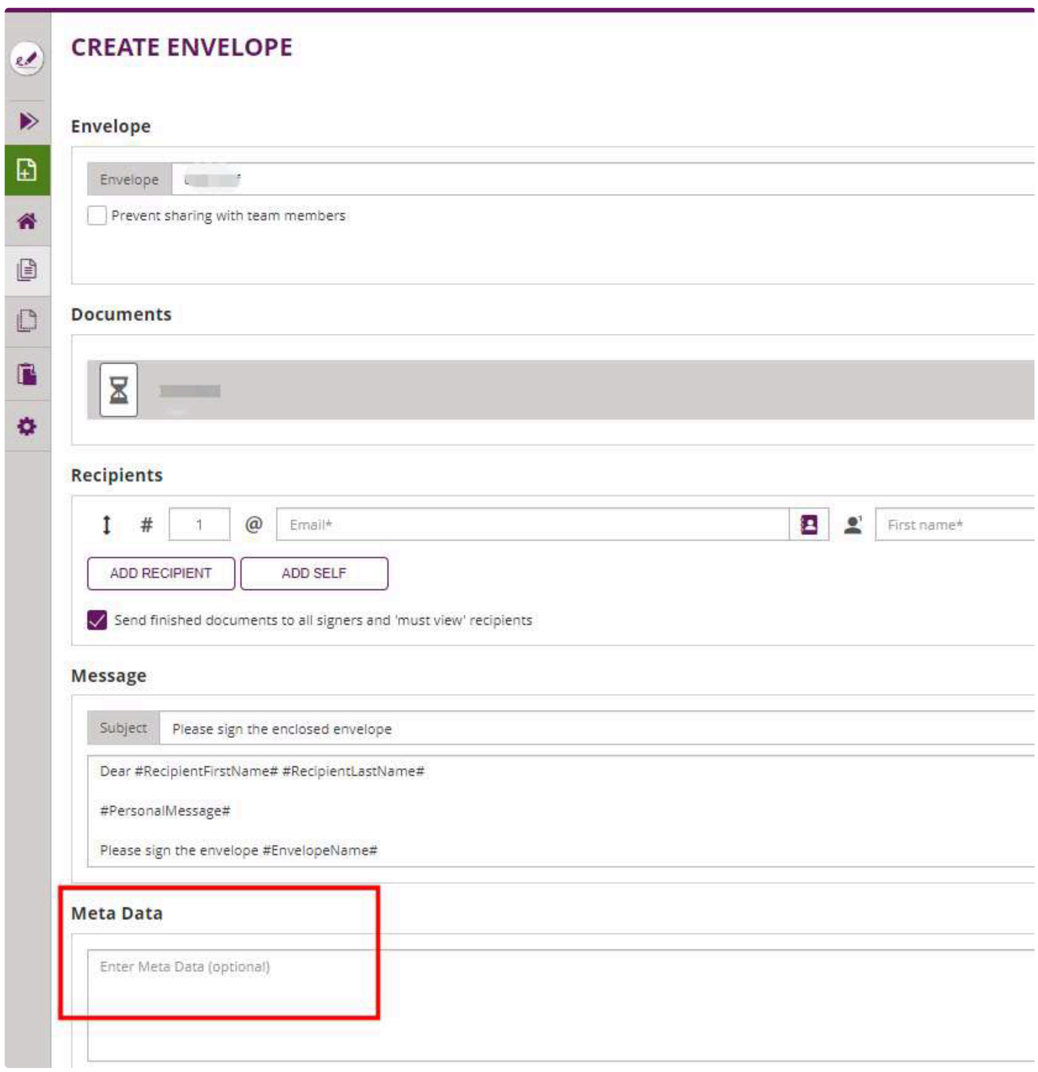


The only command that can be useful with only the eSaw plugin activated on your company is “Document Properties”. Clicking it, you will see a new window with all the information of the selected document, divided in tabs.

eSaw Plugin – Custom Meta Data

With eSaw there is the possibility to set custom metadata to be injected into Long Term Archiving (LTA), directly from eSaw interface.

This possibility is provided by the use of the following text box that is shown in the “CREATE ENVELOPE” window:



By compiling a precise structure of text instructions, it is possible to preserve the exact values desired in each of the indexes of the target document type. The parameter structure to be passed must be like the one in this example:

{"IdAzienda":"17055","IdTipologiaDocumento":"192186","IdTipologiaAuditLog":"192186","Note":"","Inde xes":[{1:"TEXT"},{2:"123"},{3:"444"},{4:"20/06/2025"},{5:"20/06/2025"},{6:"AbC"},{7:"CbA"},{8:"TEST8"},{9:"TEST9"},{10:"TEST10"}]}

As you can see in the first 3 metadata, it is necessary to specify the Company Id, a unique code identifying the company for which we are sending the file for preservation, which will be provided upon activation in the system, then the unique Id for the document type of the Practice and its Audit Log (for installations without customizations, this document type is the same for Practice and Audit Log).

After the first 3 metadata, it is possible to specify a Note for the document to be preserved (optional, in the example above the field was intentionally left blank), then we find the index definitions specific to the document type we are aiming to preserve. In the example above, only the first 7 indexes of the default document type are shown, the only ones that are mandatory.

With the following image we are going to analyze further these indexes, adding the definition of placeholders:

Metadata Document Type			**Internal naming convention**	
Pos.	LTA Metadata ENG	LTA Metadata ITA	eSaw Index names	Values
1	File Type	Tipo File	-	$$fileType$$
2	Envelope Name	Nome pratica	envelopeName	.... or $$envelopeName$$
3	Envelope ID	Envelope ID	envelopeId	.... or $$envelopeId$$
4	Creation Date	Data creazione	envelopeSentTime	.... or $$envelopeSentTime$$
5	Finished signing Date	Data completamento pratica	envelopeFinishedTime	.... or $$envelopeFinishedTime$$
6	Sender	Mittente	sender	.... or $$sender$$
7	Recipients	Destinari	receivers	.... or $$receivers$$
8	Document type	Tipo documento	-	....
9	Document number	Numero documento	-	....
10	Customer name	Denominazione cliente	-	....

{ "IdAzienda":"17055","IdTipologiaDocumento":"192186","IdTipologiaAuditLog":"192186","Note":"","Indexes":**[{1:\"$$fileType$$\"},{2:\"$$envelopeName$$\"},{3:\"$$envelopeId$$\"},{4:\"$$envelopeSentTime$$\"},{5:\"$$envelopeFinishedTime$$\"},{6:\"$$sender$$\"},{7:\"$$receivers$$\"},**{8:\"Insurance"},{9:\"57893"},{10:\"Alpha LTD"}**]** }

The left-hand side of the grid shows the default type indexes of the eSaw plugin, in both English and Italian. The right-hand side of the grid instead lists the placeholders for each of the information that the software automatically retrieves from the eSaw file. In short, placeholders are the codes to be used to indicate to preservation that the value to be entered in the index of the document type is the specific one determined by the selected placeholder, which is read with the practice directly from eSaw. All these placeholders are intelligible, so if we select **$$sender$$** for example, in preservation we will see the value of the sender of the file specified in eSaw.

Finally, in the box at the bottom of the grid you can see an example of valorization of the Meta Data field of eSaw for the company with Id 17055, towards the default document type of the service with Id 192186.

In this example, we find in indexes number 1 through 7 the mandatory values for the target document type, all highlighted in bold, and then optional indexes 8, 9, and 10 in light blue. The first 7 indexes are populated via placeholders, while the value of the last 3 indexes is specified manually, so by analyzing index 8, in preservation we will find the exact value “Insurance”.

By using what explained above, you can even write a set of custom metadata for a customized document typology.