



CO-EFFICIENT

COLLABORATIVE FRAMEWORK FOR
ENERGY EFFICIENT SME SYSTEMS

5111/1C-MED12.10 COEFFICIENT

Collaborative framework for energy EFFICIENT SME systems

Networking eService User Manual



TABLE OF CONTENTS

DOCUMENT CONVENTIONS.....	7
WEB PAGE USAGE	9
ORDER LINE STATE CHART.....	10
1 BASIC COMMUNICATION FUNCTIONS	12
1.1 ACCESS TO THE SYSTEM	12
1.2 CASUAL USER	13
1.3 CUSTOMER	16
Log in.....	16
My documents	17
1.4 SUPPLIER.....	27
Log in.....	27
1.5 MY CATALOGUE	28
Service list	28
1.6 CUSTOMERS	42
Customer list.....	42
Customer documents	46
1.7 SUPPLIERS	51
Supplier list	51
Supplier document	51
Partner search.....	51
Imported term translation	55
DISTRIBUTED PLANNING FUNCTIONS	57
1.8 PROCESSES	57
Process activities.....	57
Process models	59
Process to service	61
1.9 PLANNER.....	64
Pending actions.....	64



Figure index

Figure 1-Web page.	9
Figure 2-Tab opened.....	9
Figure 3-Tab selection list.....	10
Figure 4-Filter.	10
Figure 5-Order line state chart.	11
Figure 6-Access to the system	12
Figure 7-Company main page.....	13
Figure 8-Log in	14
Figure 9-Information form.....	14
Figure 10-Registration correctly done.....	15
Figure 11-Login	15
Figure 12-Customer log in.	16
Figure 13-Customer menu index.	16
Figure 14-My documents section.	17
Figure 15-Filter.	18
Figure 16-Filter documents.	18
Figure 17-My documents buttons.	18
Figure 18-Select a document.....	18
Figure 19-New quotation button.	19
Figure 20-New quotation tab.	19
Figure 21-Type a new quotation.	19
Figure 24-Operation done.	20
Figure 27-New Oder	21
Figure 28-New order configuration.....	21
Figure 29-New order line.....	21
Figure 30-New order line tab.	21
Figure 31-General information updated.	22
Figure 32-Quotation replied.....	22
Figure 33-Select a quotation replied.....	22
Figure 34-New order line from quotation.....	23
Figure 35-New order line inserted.	24
Figure 36-Order issued.	24
Figure 37-Abort an order line.....	25
Figure 38-Confirm abort, Cancel.	25
Figure 39-Attachments.....	26



Figure 40-Supplier log in.....	27
Figure 41-Supplier main page.....	27
Figure 42-My catalogue menu.....	28
Figure 43-Service list.	28
Figure 44-Select a service.....	28
Figure 45-Service details.....	29
Figure 46-General information section.	29
Figure 47-Publish a service.	30
Figure 48-Service name from the vocabulary.	30
Figure 49-Service vocabulary.....	30
Figure 50-Search vocabulary.	31
Figure 51-Type a keyword.	31
Figure 52-Search results.	31
Figure 53-Import a service name from the vocabulary.....	31
Figure 54-Functional parameter <i>buttons</i>	32
Figure 55-New numeric parameter.....	32
Figure 56-Search results.	33
Figure 57-New enumerative parameter <i>button</i>	33
Figure 58-Options.....	34
Figure 59-New option.....	34
Figure 60-Options list.	34
Figure 61-Save an option.....	34
Figure 62-New text parameter.....	35
Figure 63-Parameters details.	35
Figure 64-Modify a parameter.	36
Figure 65-Search vocabulary.	36
Figure 66-Search results.	37
Figure 67-New classification.....	37
Figure 68-Taxonomy reference.	38
Figure 69-Select a classification.....	38
Figure 70-Keyword section.....	39
Figure 71-Add a keyword.	39
Figure 72-Search vocabulary.	39
Figure 73-Select a keyword.	40
Figure 74-Save a keyword.....	40
Figure 75-Depending on section.	41



Figure 76-Insert attachment.....	41
Figure 77-Download attachments.....	41
Figure 78-Customers menu.....	42
Figure 79-Customer list.....	42
Figure 80-Filter customer by name.....	42
Figure 81-Select a customer name.....	43
Figure 82-Customer tab sections.....	43
Figure 83-Customer information.....	44
Figure 84-Discount list.....	45
Figure 85-Installed plants.....	45
Figure 86-Customer documents.....	46
Figure 87-Insert a quotation.....	47
Figure 88-Send request.....	47
Figure 89-New order.....	47
Figure 90-Type a customer name.....	48
Figure 91-New order.....	48
Figure 92-New order line.....	48
Figure 93-New order.....	49
Figure 94-General information updated.....	49
Figure 95-Send reply.....	50
Figure 96-Supplier menu.....	51
Figure 97-Filter a supplier.....	51
Figure 98-Partner search.....	52
Figure 99-Filter criterions.....	52
Figure 100-Add language criterion.....	53
Figure 101-Language criterions.....	53
Figure 102-Service data.....	53
Figure 103-Add service name criterion.....	54
Figure 104-Classification name criterion.....	54
Figure 105-Search partner.....	55
Figure 106-Imported term translation.....	56
Figure 107-Distributed planning menu.....	57
Figure 108-Processes menu.....	57
Figure 109-Process activity type.....	58
Figure 110-Supplier assignments.....	58
Figure 111-New process model.....	59

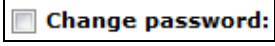
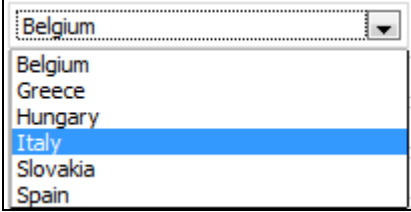
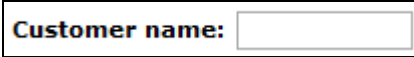
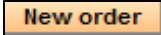


Figure 112-Add process activity.	59
Figure 113-Process model activities.	60
Figure 114-Complete a new process activity.	60
Figure 115-Activity precedence.	61
Figure 116-Show activity precedence.	61
Figure 117-Service list.	61
Figure 118-Process model list.	62
Figure 119-Fix value parameter.	62
Figure 120-Mapping parameters.	63
Figure 121-Open parameter.	63
Figure 122-Planner menu.	64
Figure 123-Order line accepted.	64
Figure 124-Plan an order line.	64
Figure 125-Plan a pending request.	65
Figure 126-Assign a supplier to a process activity.	65
Figure 127-Process activity planned.	65



Document Conventions

Consistent use of typographic conventions in documentation helps users locate and interpret information easily. The following guidelines present some specific typographic conventions.

Menu names	Bold	My catalogue menu
Dialog box options	Bold	Click Forgotten password?
Graphical user interface title elements	Bold	Change password <i>check box</i> Country <i>drop-down list box</i>
Graphical user interface elements	Italic	<i>check-box:</i>  <i>drop-down list box:</i>  <i>Text box:</i> 
<i>Buttons</i>	Bold	Click New order 



Hyperlink	Bold, blue	Document Conventions



Web page usage

Click a menu *button* in the menu bar to open a new tab.

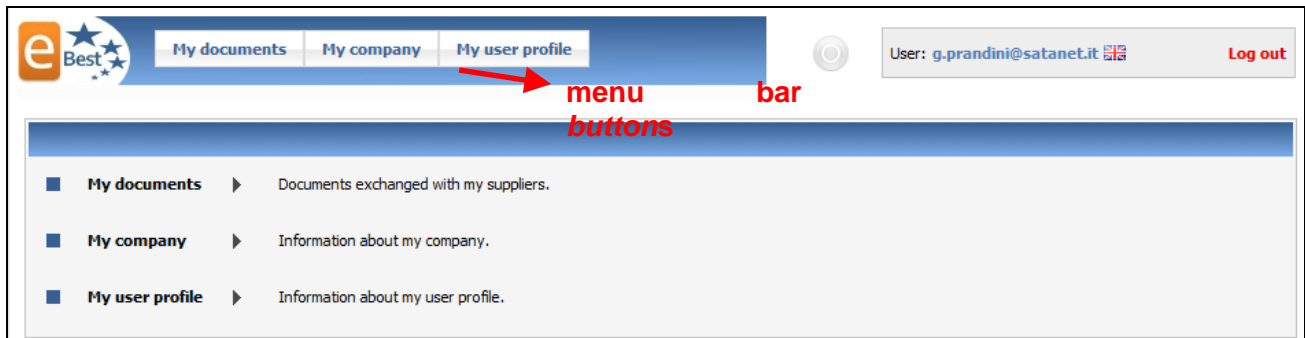




Figure 1-Web page.

The tab opened are visualised sequentially, the current page has the icon  next to the tab name.

Click a tab name to visualise it, click  to close the tab.

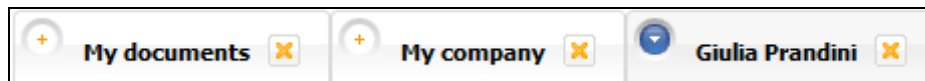


Figure 2-Tab opened.

The **Navigation tab** link appears when there are many tabs opened. The tab name opened and visible are in black, the tab name opened and hidden are in blue.

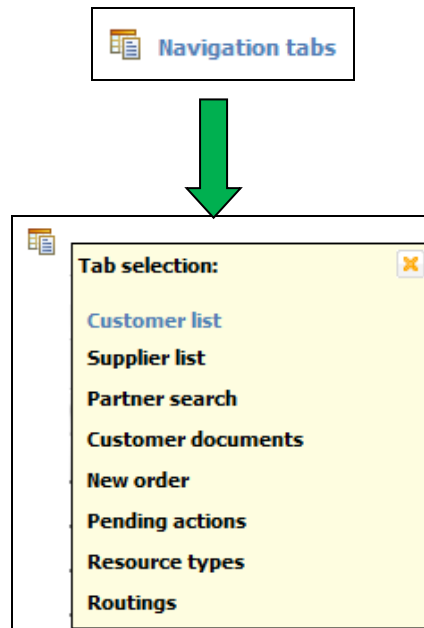


Figure 3-Tab selection list.

Click the **Filter** header to open the document filter.



Figure 4-Filter.

Type the information required then click the button to confirm to filter the list.

Order line state chart

The Order line state chart shows the order document life cycle.

Once saved the order status is **Edited**, as long as the order status is Edited the order can be modified and it is saved locally by the user.

Once sent the order status is **Issued**. If there isn't the scheduler the order status changes from Issued to **Planned**. If there is the scheduler, once scheduled the order status changes from Issued to **Accepted** then to **Planned**.

When the order status is Planned, the company supplier complete the order details (order cost, start and end date). If there isn't the scheduler the supplier company type the detail fields manually, if there is the scheduler module the detail fields are pre-compiled on the basis of the scheduler algorithm results (the values pre-compiled are suggestions, the company supplier can modify the value inserted by the scheduler module). Once inserted the order details the company supplier confirms the order, the order status changes in **Confirmed**.

The order status changes in **Execution** on the basis of the order calendar (Start date, End date). The order execution can be suspended and planned again. If there is the scheduler module the order status from **Suspended** changes in Planned, if there isn't the scheduler module the order status changes from Execution to Planned.

Both the supplier and the customer can abort the order or create an order exception.

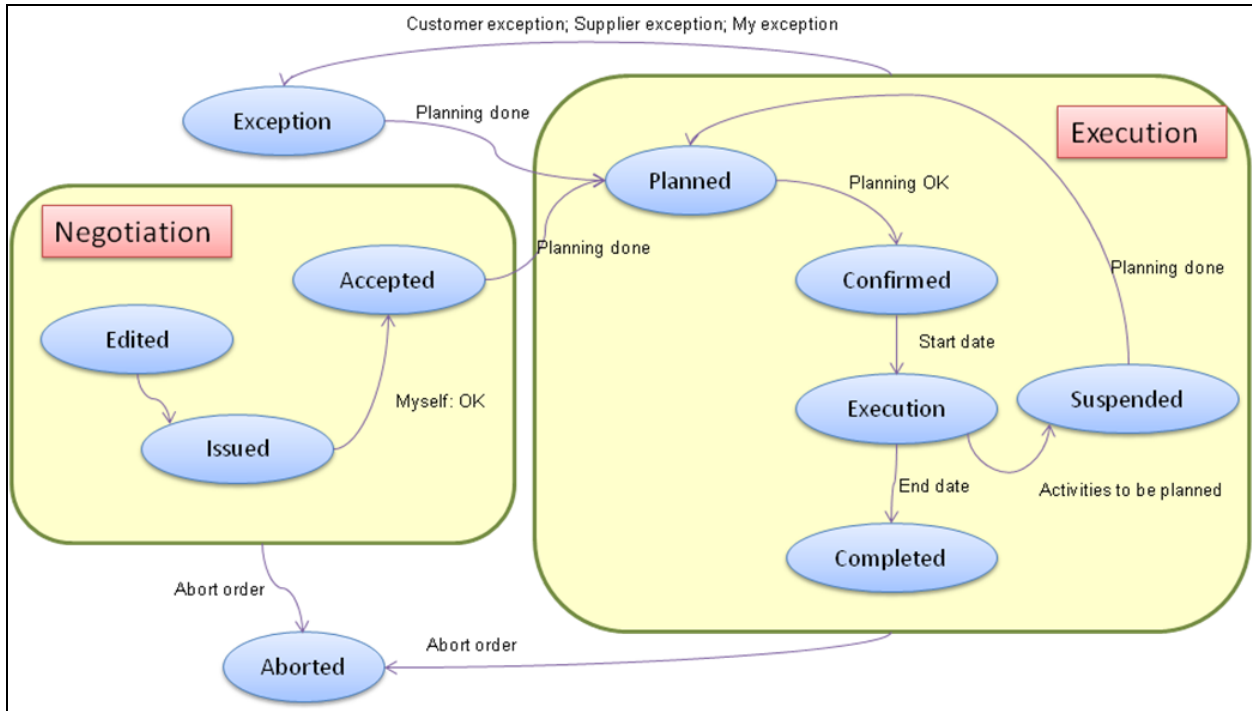


Figure 5-Order line state chart.



1 Basic communication functions

1.1 Access to the system

The initial page presents the user with the services offered by the company selected.

The screenshot shows the website for TEL&CO S.r.l. The header includes the company logo and name, along with a row of flags representing various countries. Below the header, the company's location and email address are provided. A table lists the services offered, including network installation, maintenance, and support. On the right side, there is a blue login box with fields for username and password, an 'Enter' button, and links for 'Not registered yet?' and 'Forgotten password?'.

Location: via de' Gavasseti, 313 - 41126 Modena (Italy)
E-mail: info@tlco.it

Services:

Name ▲	Description	Trade name
network installation	installation of wired and wirelss computer networks	NET INSTALL
network maintenance	maintenance service for a computer network	NET MAINTENANCE
telephone support	telephone support for computer network maintenance	TEL SUPPORT

Node log in

Username:

Password:

[Not registered yet ?](#)
[Forgotten password ?](#)

Figure 6-Access to the system

Different user profiles are envisaged:

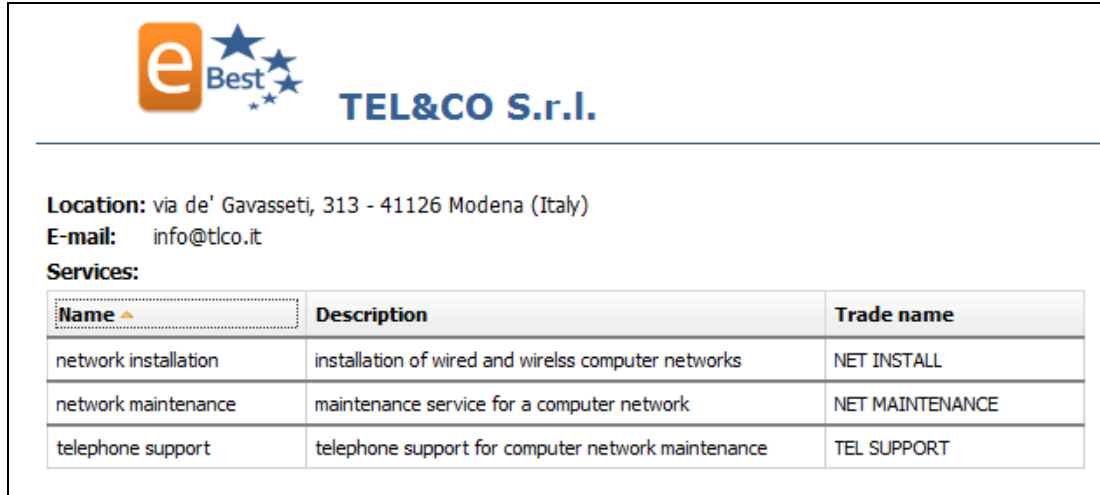
1. Casual user;
2. Customer;
3. Supplier;
4. Admin.

In the following we analyse the interface details for each user profile.

1.2 Casual user

In the company main page a casual user can visualize information about the company as:

- the company location;
- the company e-mail for information;
- the services offered.



Name ▲	Description	Trade name
network installation	installation of wired and wirelss computer networks	NET INSTALL
network maintenance	maintenance service for a computer network	NET MAINTENANCE
telephone support	telephone support for computer network maintenance	TEL SUPPORT

Figure 7-Company main page

Each service is identified by the service **Name**, the service **Description** and the **Trade name**.

Click a column header to sort the services available in:



Ascending alphabetical order



Descending alphabetical order

A casual user can access to the system by registering to provide the information of his organization and define his personal login account.

Click **Not registered yet?** to provide the information to become a customer.



The image shows a blue rectangular box titled "Node log in". Inside the box, there are two white input fields: "Username:" and "Password:". Below these fields is a white button with the text "Enter". At the bottom of the box, there are two links: "[Not registered yet ?](#)" and "[Forgotten password ?](#)".

Figure 8-Log in

Fill the form about the company information and the account information.

The image shows a registration form for TEL&CO S.r.l. The header includes the "eBest" logo and the company name "TEL&CO S.r.l." along with several language flags. Below the header, there is a instruction: "Please provide the information of your organization and define your personal login account (* required).". The form is divided into two columns of input fields. The left column contains fields for: *Organization name, Tax code identifier, *Address, *City, *Zip code, *Country (with a dropdown menu showing "Belgium"), Contact person, Telephone#1, Telephone#2, E-mail, Fax, and Languages (with checkboxes for Fr, Du, En, Gr, Hu, It, Sk, Sp). The right column contains fields for: *E-mail (user account), *Full name, *Preferred language (with a dropdown menu showing "Greek"), *Password, and *Confirm password. At the bottom of the form, there are two buttons: "Register" and "Back to home".

Figure 9-Information form

The *text boxes* with * are mandatory to complete the registration, type the *text boxes* with the information required, click **Register** to complete the registration. The message **User registration correctly done** confirms the registration.

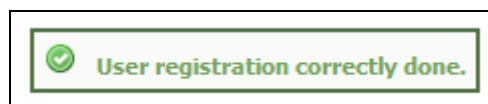




Figure 10-Registration correctly done.

Type **Username** e **password**, then click **Enter**.

A screenshot of a login interface titled "Node log in" on a dark blue background. It features two input fields: "Username:" with the text "g.prandini@satanet.it" and "Password:" with six black dots. Below the fields is a light grey "Enter" button. At the bottom, there are two links: "[Not registered yet ?](#)" and "[Forgotten password ?](#)".

Node log in

Username: g.prandini@satanet.it

Password: ●●●●●●

Enter

[Not registered yet ?](#)

[Forgotten password ?](#)

Figure 11-Login



1.3 Customer

Log in

Type **Username** e **password**, then click **Enter**.

Node log in

Username: g.prandini@satanet.it

Password: ●●●●●●

Enter

[Not registered yet ?](#)

[Forgotten password ?](#)

Figure 12-Customer log in.

The main page of the customer presents the menu index. Click a menu header to open a tab.

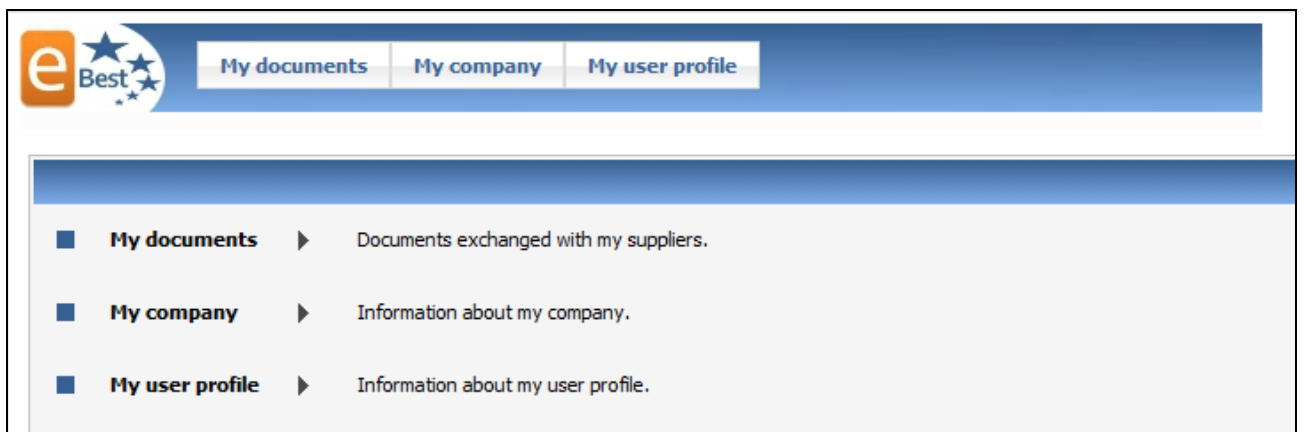


Figure 13-Customer menu index.



My documents

In **My documents** tab a customer can visualise his documents. Each document is described by:

- A number (The document number starts with: **Q** if it's a quotation, **O** if it's an order);
- A document type;
- Status;
- A supplier;
- The date of last change.

Select	Number	Document type	Status	Supplier	Last change
<input type="checkbox"/>	Q000.003	Quotation	Edited	TEL&CO S.r.l.	Wed 13 Oct 2010, 17:26:29
	O000.002	Order	Issued	TEL&CO S.r.l.	Thu 07 Oct 2010, 15:29:59
	Q000.002	Quotation	Planned	TEL&CO S.r.l.	Thu 07 Oct 2010, 15:20:20

New quotation New order Delete

1 / 1

Figure 14-My documents section.

Filter

Click the **Filter** header to open the document filter.



Figure 15-Filter.

The documents can be filtered by:

- Document type;
- Supplier;
- Interval dates;

Type the *text boxes* then click **Apply** to filter the documents.

Figure 16-Filter documents.

Click the Filter header or the blu arrow to open or close the **Filter** panel.



Filter open;



Filter closed;

To create a new quotation or a new order, see the [New quotation](#) section and the [New Order](#) section.



Figure 17-My documents buttons.

If the document status is **Edited**, the document can be modified and deleted.

Click the document number to modified the document.

Select the document *check-box*, then click **Delete** to cancel the document.

Filter					
Select	Number	Document type	Status	Supplier	Last change ▾
<input checked="" type="checkbox"/>	Q000.003	Quotation	Edited	TEL&CO S.r.l.	Thu 14 Oct 2010, 10:44:22
<input type="checkbox"/>	O000.003	Order	Edited	TEL&CO S.r.l.	Thu 14 Oct 2010, 09:57:54

1 / 1

Figure 18-Select a document.



New quotation

Click **New quotation** to create a new service quotation.

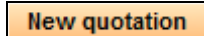


Figure 19-New quotation button.

The **New Quotation** tab will appear next to the other opened tabs.



Figure 20-New quotation tab.

The **New quotation** page has a:


- General information section;
- Service configuration section.

The General information section summarises the **Supplier name** and the supplier **Contact person**.

In the Service configuration section the customer can define the service detail. Select the service **Name** from the *drop-down list box*, type the **Address**, the **City**, the **Zip code** and the **Country** you want the service selected.

Select the **network type** from the *drop-down list box* and the **network dimension**. The network dimension has a range between square brackets, the range indicates a suggestion, the customer can type a value out the range interval and indicates in the **Notes** free *text box* some additional information.

Type the **Expected price** in Euro and the **Expected duration** in days.

If the supplier uploaded a document, click  to download the attachment.

The screenshot shows a web form titled "General information" and "Service configuration". The "General information" section includes fields for "Supplier name" (TEL&CO S.r.l.) and "Contact person". The "Service configuration" section includes a "Name" dropdown menu (network installation), "Address", "City", "Zip code", "Country" (Italy), "network type" (wireless (WLES)), "network dimension" (nodes [2 - 100]), "Expected price (EUR)", "Expected duration (days)", and "Notes". At the bottom, there is an "Attachments" section with a "Download" button and a "Save" button.

Figure 21-Type a new quotation.



Figure 22-Operation done.

In **My documents** tab the quotation status is **Edited**.

As soon as the quotation status is **Edited** the service quotation can be modified. To modify the quotation edited see [My Documents](#) tab. Once saved the quotation name starts with “Q”.

Click **Send Request** to send the service quotation to the supplier. In **My documents** tab the quotation status is **Issued** (See the [Order line state chart](#)). Once sent the quotation name starts with “Q”.



New order

Click **New order** to create a new service order.

New order

Figure 23-New Oder

The new order tab name start with "O". The new order sections are:

- General information section;
- Order lines section;
- Attachments section.

The screenshot shows the 'General information' section of a new order configuration. It includes the following fields:

- Number:** 0000.004
- Status:** Edited
- Last change:** Thu 14 Oct 2010, 10:50:59
- Supplier name:** TEL&CO S.r.l.
- Contact person:**
- Expected price (EUR):**
- Due date:**
- Notes:** (empty text area)

Below the 'General information' section, there are tabs for 'Order lines' and 'Attachments', and buttons for 'Save' and 'Send'.

Figure 24-New order configuration.

New order line

To insert a new order line click **New order line** in the **Order lines** section.

The screenshot shows the 'Order lines' section with a table and navigation controls. The table has the following columns: Select, Number, Status, Name, Quantity, End date, Due date, Price (EUR), and Expected price (EUR). Below the table, there are buttons for 'New order line', 'New order line from quotation', and 'Delete'. The table is currently empty, showing '0 / 0' rows.

Figure 25-New order line.

The new order line tab is opened next to the other tabs.

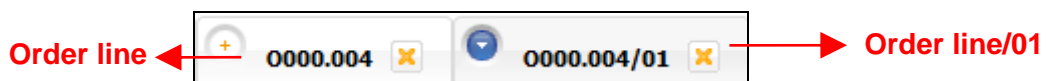



Figure 26-New order line tab.

See [Service configuration](#) in the **New quotation** section to create a new order line. The **General information** section is updated with the service configuration edited.



Expected price (EUR): 250.00
Due date: Fri 29 Oct 2010

Figure 27-General information updated.

To download the attachments upload from the supplier click  in the **Attachments** section.

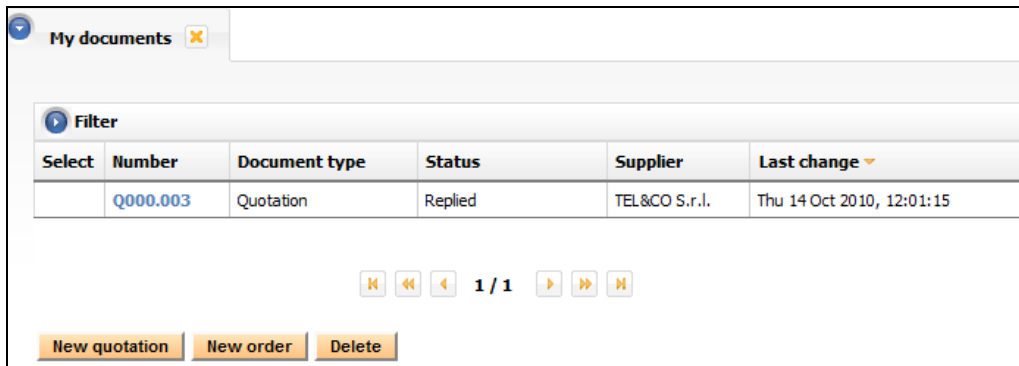
Click **Save** to save the order. When the operation is done the new order line is saved in the order tab in the **Order lines** sections.

Until the order edited is saved locally the order lines saved can be modified and the order lines status are **Edited**. To modify the order click the order line name in the **Order lines** section.

When the order is sent to the supplier the order status become **Issued** (See the [Order line state chart](#)). Click **Send** to send the order.

New order line from quotation

A new order line can be inserted from a quotation. The quotation status must be **Replied**.

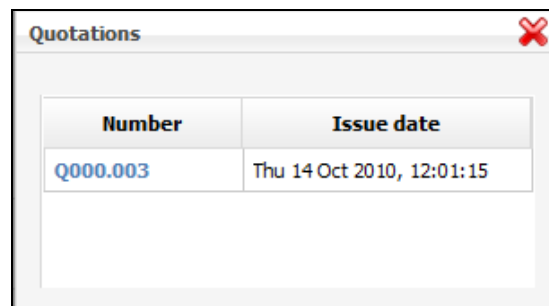


Select	Number	Document type	Status	Supplier	Last change
	Q000.003	Quotation	Replied	TEL&CO S.r.l.	Thu 14 Oct 2010, 12:01:15

Figure 28-Quotation replied.

Click **New order** in **My documents** page, then Click **New order line from quotation** in the **Order lines** section.

Click the quotation number to select the quotation replied.



Number	Issue date
Q000.003	Thu 14 Oct 2010, 12:01:15

Figure 29-Select a quotation replied.

The quotation replied is now inserted as order line. Type the **Due date** and **Notes** then click **Save** to insert the order line.



My documents | 0000.013 | 0000.013/01

Order | **Order line/01**

General information

Number: 0000.013/01
Status: Edited
Quotation: Q000.003
Last change: Thu 14 Oct 2010, 15:09:11

Service configuration

Name: network installation
Address: via Amendola, 112
City: Modena
Zip code: 41125
Country: Italy
network type: wireless
network dimension: 50.0 nodes
Expected price (EUR): 270.00
Due date:
Notes:
Attachments:

Name	Download
------	----------

Save

0 / 0

Figure 30-New order line from quotation.

When the **Operation is Done** in the order page the new order line is correctly inserted. The new order line status in **Edited**, the order line can be modified. Click **Save** to save locally the order. Click **Send** to send the order to the supplier.



The screenshot shows the 'My documents' interface for document 0000.013. It is divided into three main sections: General information, Order lines, and Attachments.

General information:

- Number: 0000.013
- Status: Edited
- Last change: Thu 14 Oct 2010, 15:32:08
- Supplier name: TEL&CO S.r.l.
- Contact person:
- Expected price (EUR): 270.00
- Due date: Fri 29 Oct 2010
- Notes: (empty text area)

Order lines:

Select	Number	Status	Name	Quantity	End date	Due date	Price (EUR)	Expected price (EUR)
<input type="checkbox"/>	0000.013/01	Edited	network installation	1		Fri 29 Oct 2010		270.00

Navigation: 1 / 1

Buttons: New order line, New order line from quotation, Delete

Attachments:

Buttons: Save, Send

Figure 31-New order line inserted.

When the order is sent to the supplier in **My documents** page the order status become **Issued**.

The screenshot shows the 'My documents' interface for document 0000.013, now with a sub-document 0000.013/01. It features a 'Filter' section with a table of documents.

Filter:

Select	Number	Document type	Status	Supplier	Last change
<input type="checkbox"/>	0000.013	Order	Issued	TEL&CO S.r.l.	Thu 14 Oct 2010, 15:37:54

Navigation: 1 / 1

Buttons: New quotation, New order, Delete

Figure 32-Order issued.



Abort an order line

In each moment the order sent can be aborted.

In the order line page click **Abort** to abort the order line.

My documents **0000.014** **0000.014/01**

General information

Number: 0000.014/01
Status: Issued
Quotation: Q000.003
Last change: Thu 14 Oct 2010, 15:45:56

Service configuration

Name: network installation
Address: via Amendola, 112
City: Modena
Zip code: 41125
Country: Italy
network type: wireless
network dimension: 50.0 nodes
Expected price (EUR): 270.00
Due date: Thu 21 Oct 2010
Notes: order 1

Attachments:

Name	Download
------	----------

Abort

Figure 33-Abort an order line.

Click **Confirm abort** to abort the order line.

Click **Cancel** to keep the order line status as **Issued**.



Figure 34-Confirm abort, Cancel.


Attachments

Click **New Attachment** to upload a document to attach to the service order.

Click **Return** to return to the quotation page.

To delete the attachment, select the attachment *check-box* then click **Delete**.



To download the attachment, select the attachment *check-box* then click .

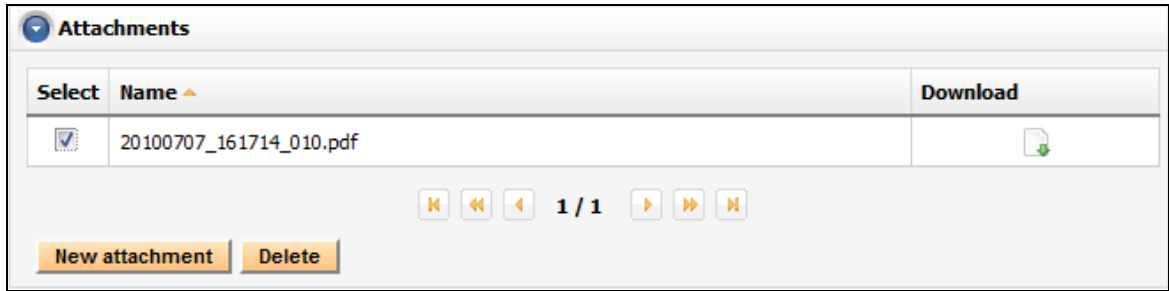


Figure 35-Attachments.

1.4 Supplier

Log in

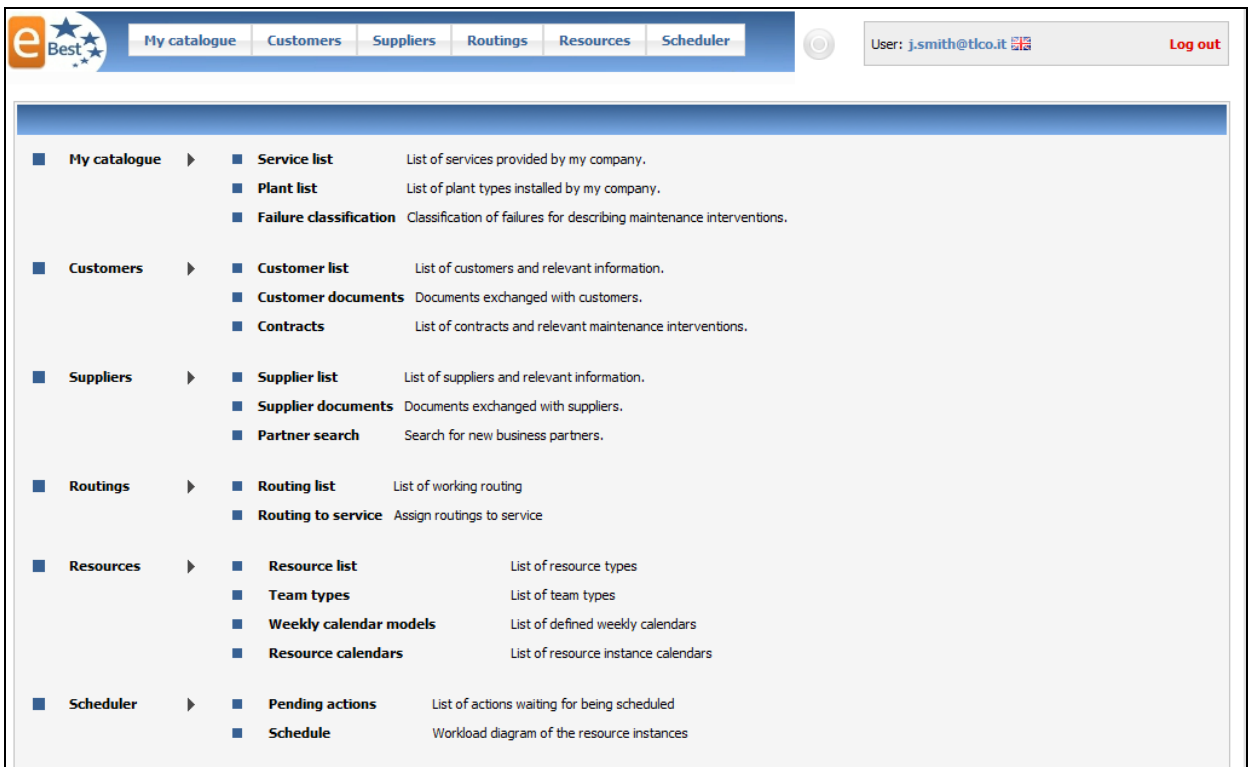
Type **Username** and **Password** the click **Enter**. Click **Forgotten password?** to receive a new password (automatically generated by the system). See the [Forgotten password](#) section.



The image shows a login form titled "Node log in" on a dark blue background. It contains two input fields: "Username:" with the text "j.smith@tlco.it" and "Password:" with five dots. Below the fields is an "Enter" button. At the bottom, there are two links: "Not registered yet ?" and "Forgotten password ?".

Figure 36-Supplier log in.

The supplier main page shows the different menu to manage the customer and supplier requests. Pass the mouse over a menu button to display the sub-menus.



The screenshot shows the supplier main page. At the top, there is a navigation bar with a logo on the left and a menu with items: "My catalogue", "Customers", "Suppliers", "Routings", "Resources", and "Scheduler". On the right of the navigation bar, it says "User: j.smith@tlco.it" and a "Log out" button. The main content area is a list of menu items, each with a sub-menu:

- My catalogue**
 - Service list: List of services provided by my company.
 - Plant list: List of plant types installed by my company.
 - Failure classification: Classification of failures for describing maintenance interventions.
- Customers**
 - Customer list: List of customers and relevant information.
 - Customer documents: Documents exchanged with customers.
 - Contracts: List of contracts and relevant maintenance interventions.
- Suppliers**
 - Supplier list: List of suppliers and relevant information.
 - Supplier documents: Documents exchanged with suppliers.
 - Partner search: Search for new business partners.
- Routings**
 - Routing list: List of working routing
 - Routing to service: Assign routings to service
- Resources**
 - Resource list: List of resource types
 - Team types: List of team types
 - Weekly calendar models: List of defined weekly calendars
 - Resource calendars: List of resource instance calendars
- Scheduler**
 - Pending actions: List of actions waiting for being scheduled
 - Schedule: Workload diagram of the resource instances

Figure 37-Supplier main page.

1.5 My catalogue

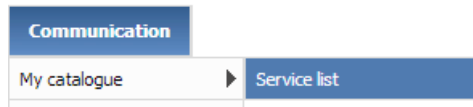


Figure 38-My catalogue menu.

Service list

In **My catalogue** menu list select **Service List**. The service list tab shows the available services offered to the customers, each service line has a **Name**, a **Trade name**, a **Status** and a **Depending on** attribute.

The service list section allows the supplier to define the services offered.

Select	Name	Trade name	Status	Depending on
<input type="checkbox"/>	network installation	NET INSTALL	Published	No
<input type="checkbox"/>	network maintenance	NET MAINTENANCE	Published	No
<input type="checkbox"/>	telephone support	TEL SUPPORT	Published	No

Buttons: New service, Publish, Unpublish, Delete

Figure 39-Service list.


Click the service name to open a new tab with the service details.

Select	Name	Trade name	Status	Depending on
<input type="checkbox"/>	network installation	NET INSTALL	Published	No
<input type="checkbox"/>	network maintenance	NET MAINTENANCE	Published	No
<input type="checkbox"/>	telephone support	TEL SUPPORT	Published	No

Figure 40-Select a service.

The new tab is displayed next the previous one. The tab name is the service name; the selected service has different sections as:

- General information section;
- Functional parameters section;
- Classification section;
- Keyword section;
- Depending on section;
- Attachments section.

Click  to open a service detail section.

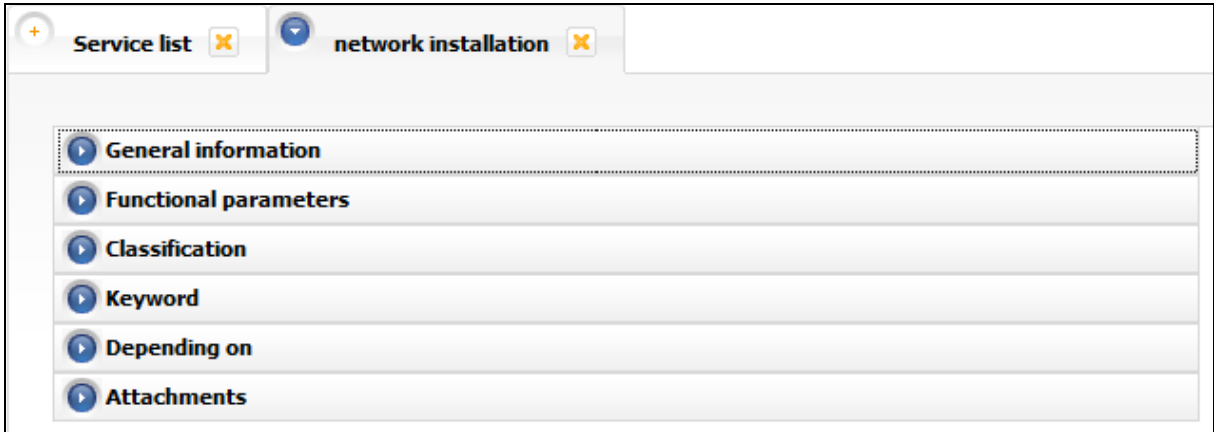


Figure 41-Service details.

General information

The General information section shows the service **Trade name** (given by the supplier to identify the service), the service **Name** (more exhaustive term selected from a common vocabulary, see [Common vocabulary](#)), a service **Status** and some service options as:

- **Use for contracts:** service used for maintenance contracts;
- **Use for company offer:** service used for quotation requests and orders;
- **Require customer location:** request the customer address during the service definition;
- **Allow multiple quantities:** for items that required multiples quantities.

The options are not exclusive, a supplier during the service definition can select more than one service option *check-boxes*. See in the **Contract** menu the [Plants](#) section to visualise how to use the **Use for contracts** *check-box*.

Click **Save** to store the service information, click **Unpublish** to keep the service locally saved and hidden from the customer account.

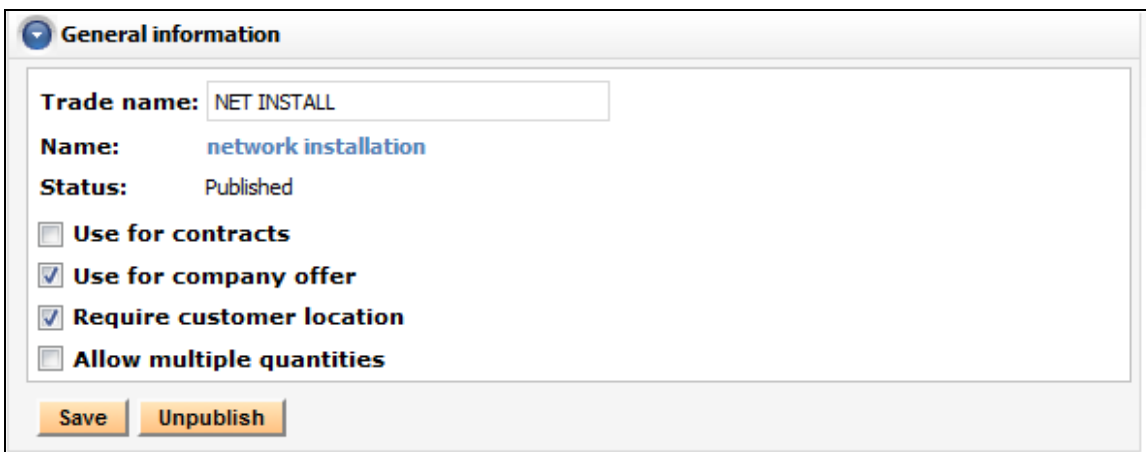


Figure 42-General information section.

If the service status is **Hidden**, click **Publish** to broadcast the service to the customers.



The screenshot shows a web form titled "General information" with a dropdown arrow on the left. It contains the following fields and options:

- Trade name:** A text input field containing "NET INSTALL".
- Name:** A text input field containing "network installation" in blue text.
- Status:** A text input field containing "Hidden".
- Use for contracts**
- Use for company offer**
- Require customer location**
- Allow multiple quantities**

At the bottom of the form are two buttons: "Save" and "Publish".

Figure 43-Publish a service.

Common vocabulary

Click the service name to visualise the common vocabulary.

The screenshot shows a single text input field with the label "Name:" and the value "network installation" in blue text.

Figure 44-Service name from the vocabulary.

The service vocabulary has a local section and a lingua franca section. The **local** terms are in the user language, the **lingua franca** terms are the local translations into the English language. Each term has a **Label** (synthetic description) and a **Description** (Exhaustive description).

Type the lingua franca terms to modify the service name and description. Click **Save** to store the service name, click **Return** to maintain the old settings.

The screenshot shows a web form titled "Search vocabulary" with a dropdown arrow on the left. It contains the following fields and options:

- Name:** A dropdown menu.
- Label (local):** A text input field containing "network installation".
- Description (local):** A text input field containing "installation of wired and wirelss computer networks".
- Label (lingua franca):** A text input field containing "network installation".
- Description (lingua franca):** A text input field containing "installation of wired and wirelss computer networks".

At the bottom of the form are two buttons: "Save" and "Return".

Figure 45-Service vocabulary.

To modify the service name a user can type directly the *text boxes* or search a term into the common vocabulary.


Click  to open the **Search vocabulary**.

Figure 46-Search vocabulary.

Type a keyword you want to search in the *text box*, select the language from the *drop-down list box* in which the search results will be displayed. Click **Search** to start searching the terms.

Figure 47-Type a keyword.

The terms found are displayed in a list. Each term has the translation in the local language and the corresponding translation in the lingua franca. The **Local language** flag shows the user local language.

Local language	Label (local)	Description (local)	Label (lingua franca)	Description (lingua franca)
	network	computer network	network	computer network
	network installation	installation of wired and wireless computer networks	network installation	installation of wired and wireless computer networks
	network maintenance	maintenance service for a computer network	network maintenance	maintenance service for a computer network
	telephone support	telephone support for computer network maintenance	telephone support	telephone support for computer network maintenance

Figure 48-Search results.

Click the **Label(local)** name to import the service name.

Local language	Label (local)	Description (local)	Label (lingua franca)	Description (lingua franca)
	network	computer network	network	computer network
	<u>network installation</u>	installation of wired and wireless computer networks	network installation	installation of wired and wireless computer networks
	network maintenance	maintenance service for a computer network	network maintenance	maintenance service for a computer network
	telephone support	telephone support for computer network maintenance	telephone support	telephone support for computer network maintenance

Figure 49-Import a service name from the vocabulary.

Click **Save** to store the service name, click **Return** to maintain the old settings.

Functional parameters

There are three types of functional parameters:

1. Numeric parameters;
2. Enumerative parameters;
3. Text parameters;

Numeric parameter

Click **New numeric parameter** to create a new parameter.

Select	Label (local) ▲	Description (local)	Type
<input type="checkbox"/>	network dimension	dimension of a computer network	Numeric parameter
<input type="checkbox"/>	network type	type of computer network	Enumerative parameter

1 / 1

Figure 50-Functional parameter *buttons*.

Type the information required in the *text boxes* then click **Save** to store the information, or **Return** to come back the previous page.

Search vocabulary

Numeric parameter

Label (local):

Description (local):

Label (lingua franca):

Description (lingua franca):

Unit of measurement label (local):

Unit of measurement description (local):


Unit of measurement label (lingua franca):

Unit of measurement description (lingua franca):

Range (min):

Range (max):

Figure 51-New numeric parameter.

To search an existing term click  in the **Search vocabulary** header. Type a keyword of the parameter you are looking for in the *text box*, select from the *drop-down list box* **Parameter term** (if you are searching a term name) or **Unit of measurement term** (if you are looking for a unit of measurement). Select the language from the *drop-down list box* (local language or lingua franca), then click **Search**.

The screenshot shows the 'Search vocabulary' interface. At the top, there is a search bar with the text 'network' entered. Below the search bar are two dropdown menus: 'Unit of measurement term' and 'Local language'. A 'Search' button is located below the search bar. The search results are displayed in a table with the following columns: 'Local language', 'Label (local)', 'Description (local)', 'Label (lingua franca)', and 'Description (lingua franca)'. The results show one entry for 'nodes' in the local language (English) and 'nodes' in the lingua franca. Below the table are navigation controls, including a '1 / 1' indicator.

Local language	Label (local)	Description (local)	Label (lingua franca)	Description (lingua franca)
	nodes	number of computers belonging to the same network	nodes	number of computers belonging to the same network

Figure 52-Search results.

To import a term click the Label (local) name, then click **Save** to store the parameter, then click **Return** to come back the service tab. To unsaved the changes click **Return** without saving.

Enumerative parameter

Click **New enumerative parameter** to create a new parameter.

The screenshot shows the 'Functional parameters' interface. It features a table with columns: 'Select', 'Label (local)', 'Description (local)', and 'Type'. There are two entries in the table: 'network dimension' (Numeric parameter) and 'network type' (Enumerative parameter). Below the table are navigation controls, including a '1 / 1' indicator. At the bottom of the interface, there are four buttons: 'New numeric parameter', 'New enumerative parameter', 'New text parameter', and 'Delete'.

Select	Label (local)	Description (local)	Type
<input type="checkbox"/>	network dimension	dimension of a computer network	Numeric parameter
<input type="checkbox"/>	network type	type of computer network	Enumerative parameter

Figure 53-New enumerative parameter *button*.

Type the information required then click **Save**, or click **Search vocabulary** to import an existing term from the vocabulary. Once saved an **Options** section is visible.



Service list network installation

Search vocabulary

Enumerative parameter

Label (local): network dimension
Description (local): dimension of a computer network
Label (lingua franca): network dimension
Description (lingua franca): dimension of a computer network


Save Return

Options

Select	Code	Label (local)	Description (local)	Label (lingua franca)	Description (lingua franca)

New option Move up Move down Delete

Figure 54-Options.

Click **New option** to add an element to the enumerative parameter. Type the new option term (local and lingua franca) in the *text boxes*, then click  to save.

Options

Select	Code	Label (local)	Description (local)	Label (lingua franca)	Description (lingua franca)
<input type="checkbox"/>					

New option Move up Move down Delete

Figure 55-New option.



Select an option the click **Move up** or **Move down** to change the options order. Click **Delete** to cancel an option.

Options

Select	Code	Label (local)	Description (local)	Label (lingua franca)	Description (lingua franca)
<input type="checkbox"/>	WRED	wired	wired computer network	wired	wired computer network
<input type="checkbox"/>	WLES	wireless	wireless computer network	wireless	wireless computer network

New option Move up Move down Delete

Figure 56-Options list.

To modify an existing option click . Type the changes in the *text boxes* then click .

<input type="checkbox"/>	WLES	wireless	wireless computer network	wireless	wireless computer network
--------------------------	------	----------	---------------------------	----------	---------------------------

Figure 57-Save an option.

New text parameter

Click **New text parameter** to create a new text parameter. Type the label and the description in the local language and in lingua franca then click **Save**.

Use the **Search vocabulary** section to search an existing term.

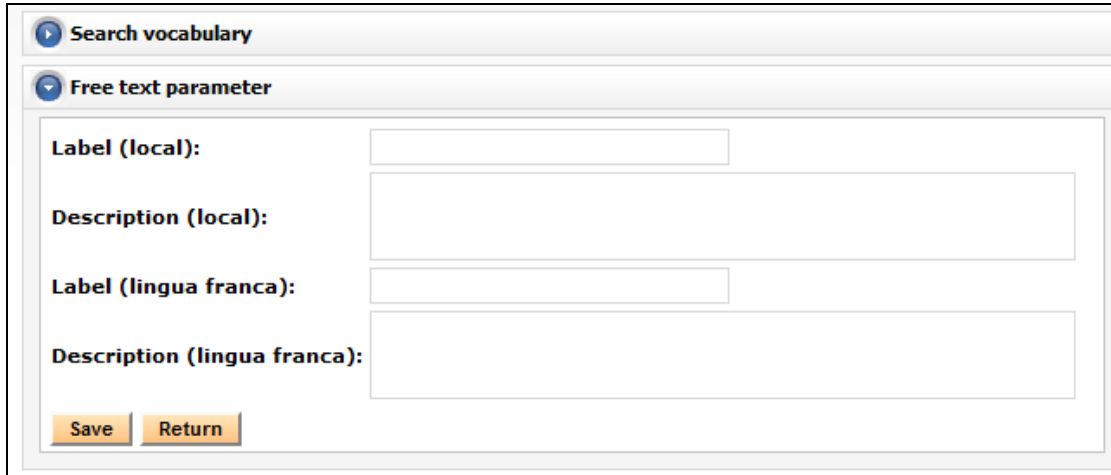
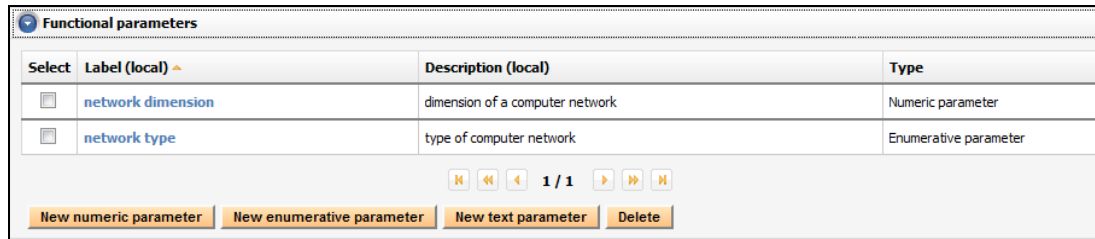


Figure 58-New text parameter.

Modify an existing parameter

Click the parameter label(local) name to open the parameter details.



Select	Label (local)	Description (local)	Type
<input type="checkbox"/>	network dimension	dimension of a computer network	Numeric parameter
<input type="checkbox"/>	network type	type of computer network	Enumerative parameter

Figure 59-Parameters details.

To modify the parameter, type the lingua franca translation in the term *text boxes*, then click **Save**.

Figure 60-Modify a parameter.

To import a term from the vocabulary, click  in the **Search vocabulary** header.

Figure 61-Search vocabulary.

Type a keyword of the parameter you are looking for in the *text box*, select from the *drop-down list box* **Parameter term** (if you are searching a term name) or **Unit of measurement term** (if you are looking for a unit of measurement). Select the language from the *drop-down list box* (local language or lingua franca), then click **Search**.



Search vocabulary

Text: network Unit of measurement term Local language

Search

Local language	Label (local) ^	Description (local)	Label (lingua franca)	Description (lingua franca)
	nodes	number of computers belonging to the same network	nodes	number of computers belonging to the same network

1 / 1

Figure 62-Search results.

To import a term click the Label (local) name, then click **Save** to store the parameter, then click **Return** to come back the service tab.

To unsaved the changes click **Return** without saving.

Classification

The company classification is useful for the partner search. The terms used to classify a company can be selected from taxonomy of terms.

Click **New taxonomy reference** to search a classification term.

Select an existing classification then click **Delete** to cancel the classification.

Classification

Select	Taxonomy reference ^	Taxonomy reference description
<input type="checkbox"/>	telecommunications	telecommunications

1 / 1

New taxonomy reference Delete

Figure 63-New classification.

The taxonomy shows the areas available.

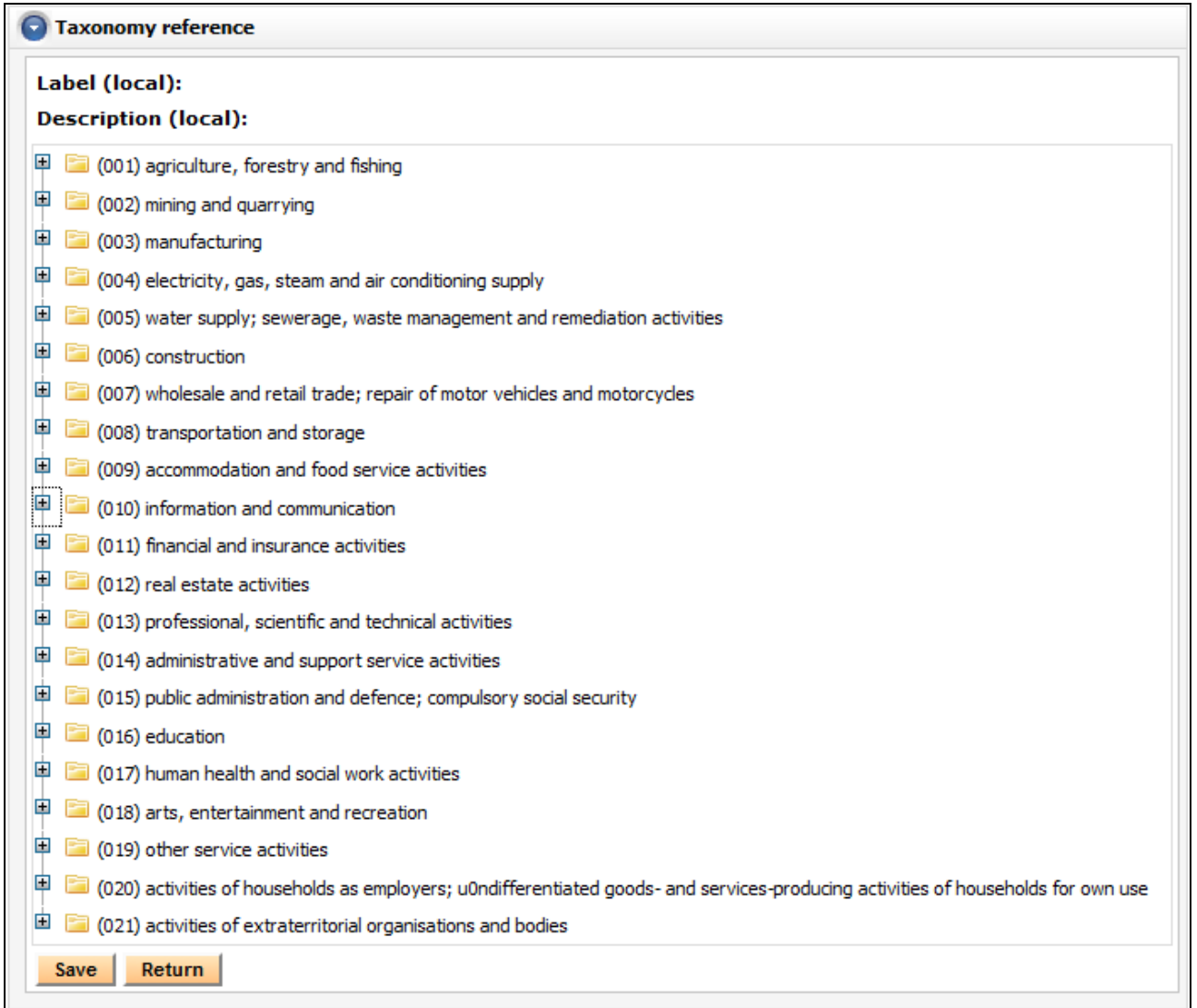


Figure 64-Taxonomy reference.

A plus sign next to a folder indicates that it can be expanded to show more folders, a minus sign indicates that it can be collapsed. Select a classification among the available, more than one classification can be add to the company.



Figure 65-Select a classification.

To store the company classification click **Save**, when the operation is done click **Return** to come back the service tab.
To come back the service tab click **Return** without saving.



Keyword

The company keyword is useful for the partner search. The terms inserted in the keyword section are hidden from the user but are useful for the search algorithms.

Select	Keyword label ▲	Keyword description
<input type="checkbox"/>	network	computer newtork

Navigation: 1 / 1

Buttons: New keyword, Delete

Figure 66-Keyword section.

Type a new keyword

Click **New keyword** to add a company keyword. Type the labels and descriptions both in local language and in lingua franca then click Save. When the operation is done click **Return** to come back the service page.

Text: [] Local language []

Search

Local language	Label (local) ▲	Description (local)	Label (lingua franca)	Description (lingua franca)
----------------	-----------------	---------------------	-----------------------	-----------------------------

Keyword

Label (local): []

Description (local): []

Label (lingua franca): []

Description (lingua franca): []

Buttons: Save, Return

Figure 67-Add a keyword.

Search a keyword

Type the keyword you want to search in the **Text** text-box, select the language from the *drop-down list box* then click **Search**.

Text: network Local language []

Search

Local language	Label (local) ▲	Description (local)	Label (lingua franca)	Description (lingua franca)
----------------	-----------------	---------------------	-----------------------	-----------------------------

Figure 68-Search vocabulary.

Click the keyword label name to import the keyword.

Search vocabulary

Text: network Local language

Search

Local language	Label (local)	Description (local)	Label (lingua franca)	Description (lingua franca)
	network	computer newtork	network	computer network
	network installation	installation of wired and wirelss computer networks	network installation	installation of wired and wirelss computer networks
	network installation	installation of wired and wirelss computer networks	network installation2	installation of wired and wirelss computer networks
	network maintenance	maintenance service for a computer network	network maintenance	maintenance service for a computer network
	telephone support	telephone support for computer network maintenance	telephone support	telephone support for computer network maintenance

Figure 69-Select a keyword.

Click **Save** to store the keyword, when the operation is done click **Return** to come back the service page.

Keyword

Label (local): network installation

Description (local): installation of wired and wirelss computer networks

Label (lingua franca): network installation

Description (lingua franca): installation of wired and wirelss computer networks

Save Return

Figure 70-Save a keyword.

Modify a keyword

Click the keyword label name to modify the keyword term.

Keyword

Select	Keyword label	Keyword description
<input type="checkbox"/>	network	computer newtork

1 / 1

New keyword Delete

Modify the lingua franca label and description then click **Save** to store the changes, click **Return** to come back the service page.



Depending on

In the **Depending on** section select the services to which the current service depends. Click **Update dependencies** to store the dependencies.

Select	Name ^	Trade name
<input type="checkbox"/>	network maintenance	NET MAINTENANCE
<input type="checkbox"/>	telephone support	TEL SUPPORT

Navigation: 1 / 1

Update dependencies

Figure 71-Depending on section.

Attachment


Click **New attachment** to upload an attachment.


Select	Name ^	Download
--------	--------	----------

Navigation: 0 / 0

New attachment Delete

Figure 72-Insert attachment.

Click  to download an attachment uploaded. Select an attachment row then click **Delete** to cancel the attachment uploaded.

Select	Name ^	Download
<input type="checkbox"/>	e-best.jpeg	

Navigation: 1 / 1

New attachment Delete

Figure 73-Download attachments.

1.6 Customers



Figure 74-Customers menu.

Customer list

In the customer list tab are listed the customers of the company. Click **New customer** to add manually a new customer. Select a customer then click **Delete** to cancel the customer information.

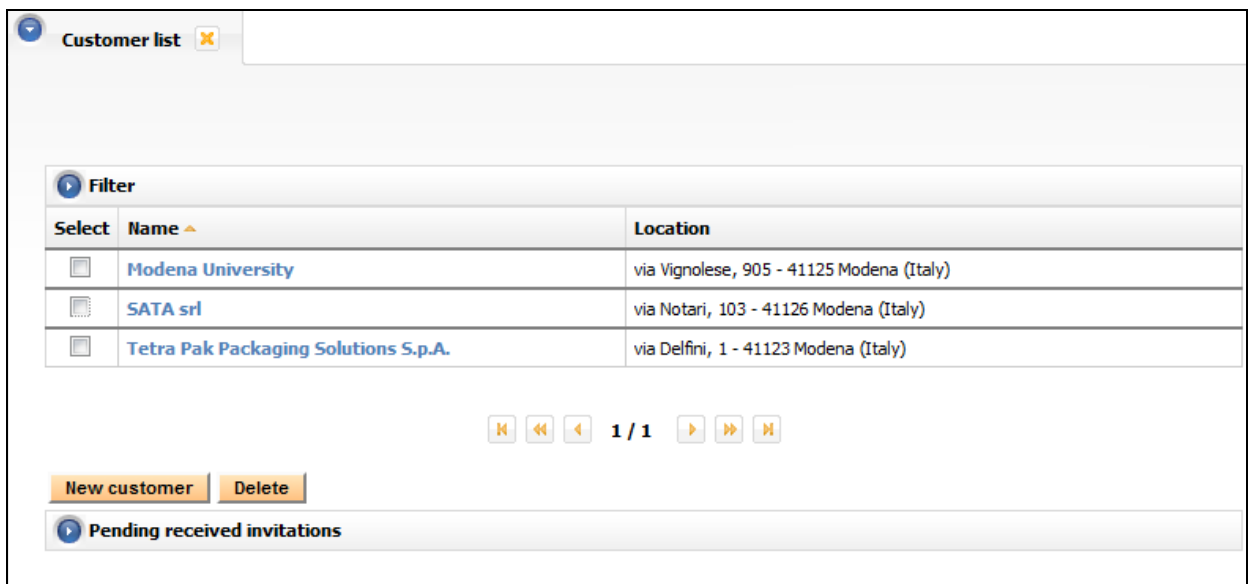



Figure 75-Customer list.

In a distributed context of company collaboration, in the **Pending received invitations section** are listed the request of invitation received from hypothetical customers. See distributed context.

Click  to open the **Filter** section, type the customer name you are looking for in the **Name** text-box, and then click **Apply**. Click **Reset** to cancel the text edited.

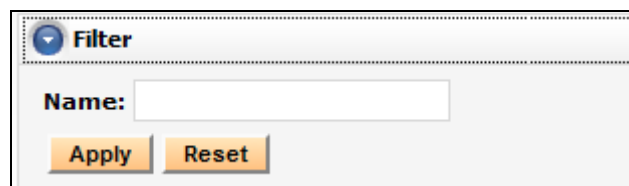


Figure 76-Filter customer by name.

Click the customer name to open the customer information tab.




Select	Name	Location
<input checked="" type="checkbox"/>	Modena University	via Vignolese, 905 - 41125 Modena (Italy)
<input type="checkbox"/>	SATA srl	via Notari, 103 - 41126 Modena (Italy)
<input type="checkbox"/>	Tetra Pak Packaging Solutions S.p.A.	via Delfini, 1 - 41123 Modena (Italy)

Figure 77-Select a customer name.

The customer tab has three sections:

1. General information;
2. Discount list;
3. Installed plants.

Click  to open a section.

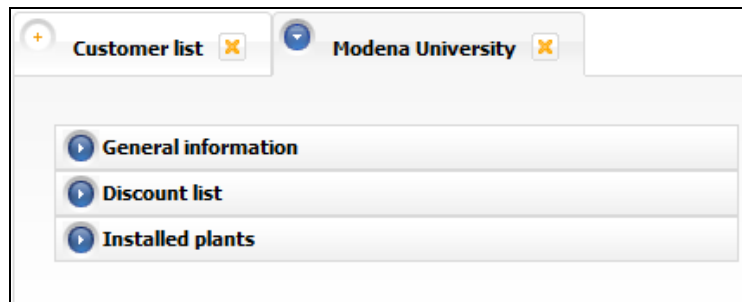


Figure 78-Customer tab sections.



General information

In the **General information** section are resumed the customer company information, and there are two hyperlinks to:

1. Customer documentation;
2. Contracts.

Name:	Modena University
Tax code identifier:	12345678911
Address:	via Vignolese, 905
City:	Modena
Zip code:	41125
Country:	Italy
Contact person:	Flavio Bonfatti2
Telephone#1:	
Telephone#2:	
E-mail:	flavio.bonfatti@unimore.it
Fax:	
Languages:	<input type="checkbox"/> Fr <input type="checkbox"/> Du <input checked="" type="checkbox"/> En <input type="checkbox"/> Gr <input type="checkbox"/> Hu <input checked="" type="checkbox"/> It <input type="checkbox"/> Sk

[Customer documents](#)
[Contracts](#)

Save

Figure 79-Customer information.

Modify the general information then click **Save** to store the changes.

Click **Customer documents** to open the list of documents related to the customer selected, see [Customer documents](#).

Click **Contracts** to open the contract document page, see [Contracts](#).

Discount list

The **Discount list** section shows the discount applied to the customer selected. Click



to modify an existing discount row. Click **New discount** to add a discount list.

Select a discount row then click **Delete** to cancel a discount.

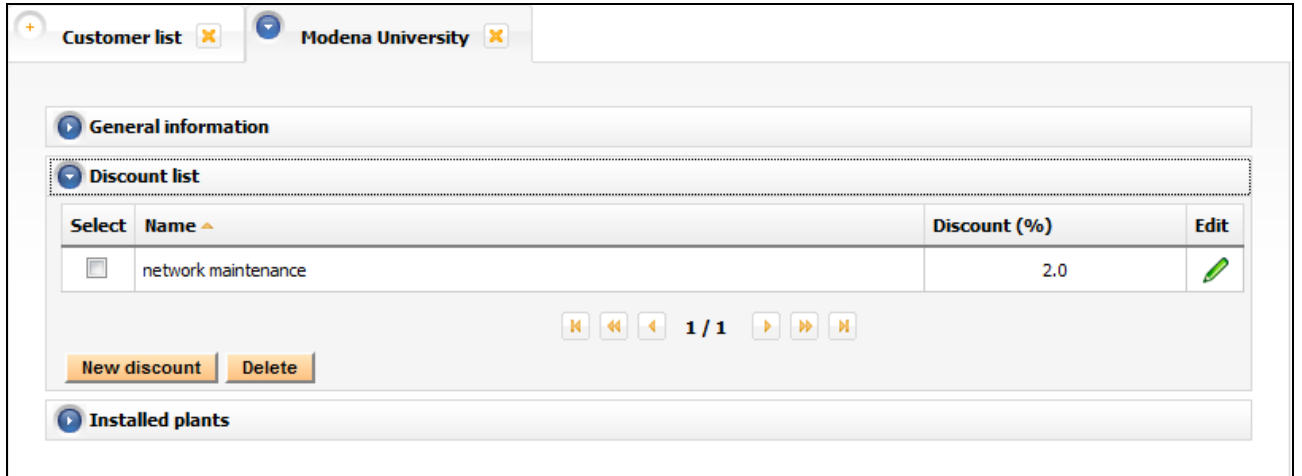


Figure 80-Discount list.

Installed plants

The installed plants section shows the plant installed for the customer selected. Click **New plant** to add a plant. Select a plant *check-box* then click **Delete** to cancel the plant.

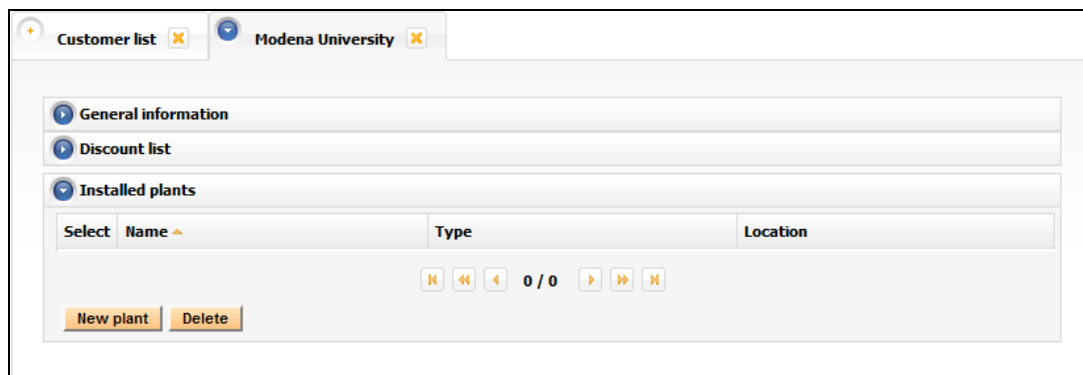

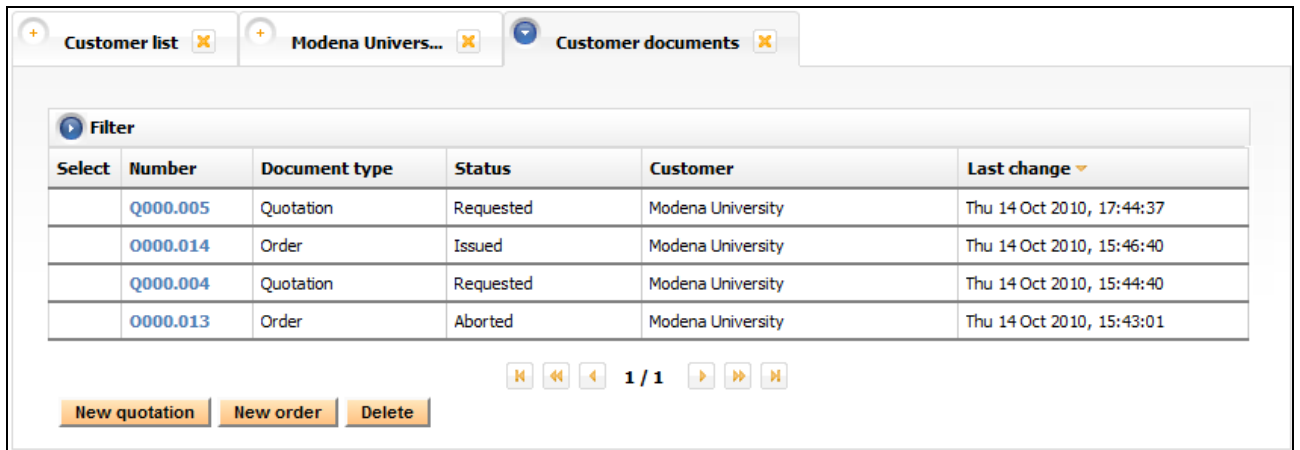


Figure 81-Installed plants.

Customer documents

The customer documents list shows the quotations and the orders. Click  to filter the document list.



Select	Number	Document type	Status	Customer	Last change
	Q000.005	Quotation	Requested	Modena University	Thu 14 Oct 2010, 17:44:37
	O000.014	Order	Issued	Modena University	Thu 14 Oct 2010, 15:46:40
	Q000.004	Quotation	Requested	Modena University	Thu 14 Oct 2010, 15:44:40
	O000.013	Order	Aborted	Modena University	Thu 14 Oct 2010, 15:43:01

Figure 82-Customer documents.

See [Reply to a quotation](#) and [Reply to an order](#) to reply to quotations and orders. If the customer contacts the supplier by telephone, the supplier can insert a quotation or an order in this section. Click **New quotation** to insert a new quotation related to the customer selected, click **New order** to insert a new order related to the customer selected.

New quotation

Type the information required in the **General information** section and in the **Service configuration** section. In the service configuration **Name** in the *drop-down list box* are available the services loaded from the supplier, see the [Service list](#) section.

To save the configuration edited among the configurations available click **Save configuration**.

Click **Load configuration** to load a configuration saved.

Click **Save** to store the quotation as **Edited** (the quotation can be modified).



Figure 83-Insert a quotation.

Once saved, click **Send request** to send the quotation.



Figure 84-Send request.

When the operation is done, the quotation status is **Requested**. See in the **Scheduler** menu the [Pending actions](#) section.

From the **Customer documents** tab click **New order** to insert an order for a customer.

Figure 85-New order.

The **Customer name** test-box is an auto-complete text-box that helps the supplier looking for a customer name. Type the **Customer name** then click **Save**.

Figure 86-Type a customer name.

The new order tab name start with “O”. The new order sections are:

- General information section;
- Order lines section;
- Attachments section.

Figure 87-New order.

To insert a new order line click **New order** line in the **Order lines** section.

Figure 88-New order line.



The new order line tab is opened next to the other tabs.


The screenshot shows a web interface with several tabs at the top: 'Customer list', 'Modena Univers...', 'Customer docum...', '0000.015', and '0000.015/01'. The main content area is divided into two sections: 'General information' and 'Service configuration'. The 'General information' section displays: Number: 0000.015/01, Status: Edited, Last change: Fri 22 Oct 2010, 16:06:07. The 'Service configuration' section contains various input fields: Name (network installation), Address (via Amendola 123), City (Modena), Zip code (41125), Country (Italy), network type (wired (WRED)), network dimension (5.0 nodes [2 - 100]), network dimension code (code (cod)), Expected price (EUR) (80), and Due date (03/11/2010). There is a 'Notes' text area and an 'Attachments' table with one entry: 'e-best.jpeg' with a 'Download' button. At the bottom, there are buttons for 'Load configuration', 'Save configuration', and 'Save'.

Figure 89-New order.

The **General information** section in the order tab will be updated with the service configuration edited.

The screenshot shows a box with updated information: 'Expected price (EUR): 250.00' and 'Due date: Fri 29 Oct 2010'.

Figure 90-General information updated.

To download the attachments upload from the supplier click  in the **Attachments** section.

Click **Save** to save the order line. When the operation is done the new order line is saved in the order tab in the **Order lines** sections.

Until the order edited is saved locally the order lines saved can be modified and the order lines status are **Edited**. To modify the order click the order line name in the **Order lines** section.

When the order is sent to the supplier the order status become **Issued** (See the [Order line state chart](#)). Click **Send** in the order tab to send the order.



Reply to an order

Click the order name in the **Customer documents** tab to open the order received (The order status is Issued).

Select	Number	Document type	Status	Customer	Last change
<input type="checkbox"/>	013.00020	Order	Issued	Fashion Contract Soc. Consortie a Resp. limitata	Mon 08 Jul 2013, 11:40:20

Click **Acquire** to acquire the order, then edit the order line typing the **Price**, the **Duration days**, then click **Confirm** to send the order. When the operation is done the order status is **Confirmed**.

The screenshot shows the 'Customer documents' interface. At the top, there are three breadcrumb items: 'Customer docum...', '013.00020', and '013.00020/01'. The '013.00020' item is circled in red. Below the breadcrumbs, the 'General information' section is expanded, showing fields for Number (013.00020/01), Status (Planned), Last change (Mon 08 Jul 2013, 11:42), Price per unit (≈0.00), Final price (≈0.00), Start time (10/07/2013, 11:39), Expected start time (10/07/2013, 11:39), End date, and Due date. There are buttons for 'Confirm', 'Edit order line', and 'Phase instance list'. The 'Service configuration' section is also expanded, showing 'Service: ironing-packaging-delivery', 'Service parameters' (box type: euro-pallet (standard), package notes), and 'Service attachments' (Name, Download). On the right, there is a 'Quantity {0}' section with radio buttons for 'Numeric', 'Alphabetic', and 'Single' (selected), and a 'Quantity: 10' field.

Figure 91-Send reply.

1.7 Suppliers

The **Suppliers** menu allows the supplier management.
Click the **Suppliers** menu then select a sub-menu from the list.

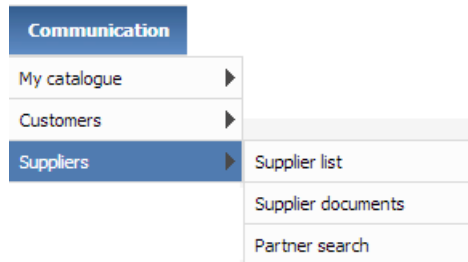



Figure 92-Supplier menu

Supplier list

In the supplier list tab are listed the suppliers of the company.

Click  to open the **Filter** section, type the supplier name you are looking for in the **Name** text-box, and then click **Apply**. Click **Reset** to cancel the text edited.

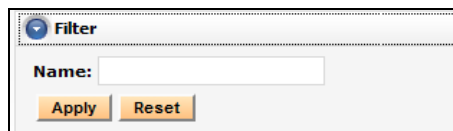



Figure 93-Filter a supplier

In a distributed context of company collaboration, in the **Pending sent invitations** section are listed the request of invitation sent to hypothetical supplier. See distributed context and [Customer list](#).

Supplier document


The supplier documents list shows the quotations and the orders. Click  to filter the supplier list.

See [Customer documents](#), See [Reply to a quotation](#) and [Reply to an order](#) to reply to quotations and orders.

The supplier can insert manually a quotation or an order in this section. Click **New quotation** to insert a new quotation related to the supplier selected, click **New order** to insert a new order related to the supplier selected. See [New quotation](#).

Partner search

In a distributed context of company collaboration a supplier can search a partner node. Among the supplier list is always listed also the supplier itself because a company can assign to its internal resource an activity.

Click  to open the **Filter** section, type the organisation criterion you are looking for. Click **Delete** to cancel the text edited and the criterion. The search can be done by **Organisation data** and/or by **Service data**.

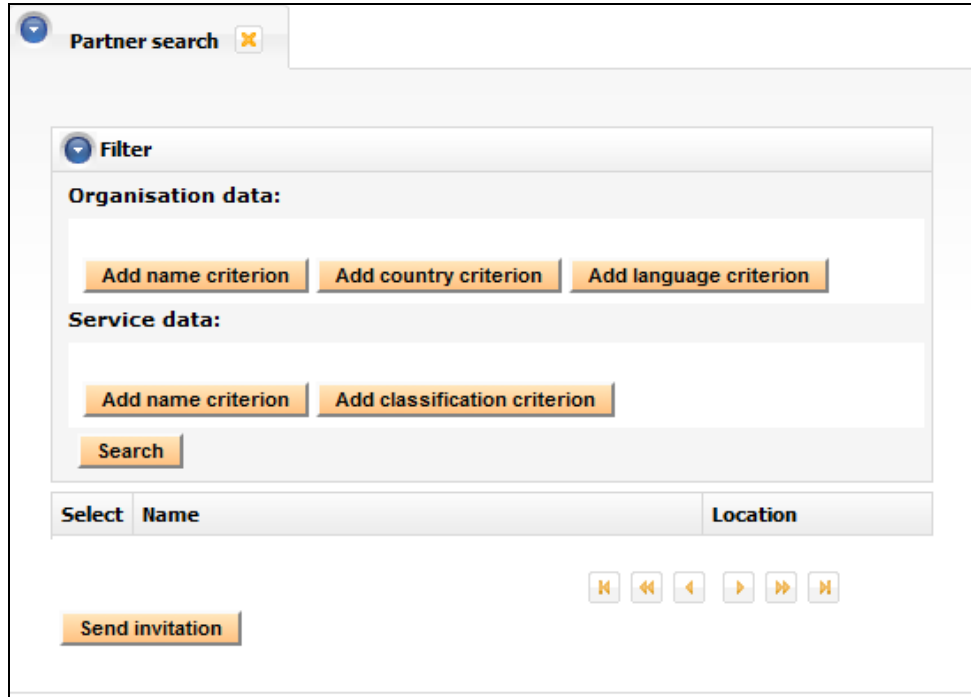


Figure 94-Partner search

Organisation data

Click **Add name criterion** to add an additional criterion to search a company. When the name criterions inserted are more than one, the name criterions are alternative (OR logical operator).

Click **Add country criterion** to add the country where the company is. When the country criterions are more than one, the country criterions are alternative.

Click **Add language criterion** to add a company language.

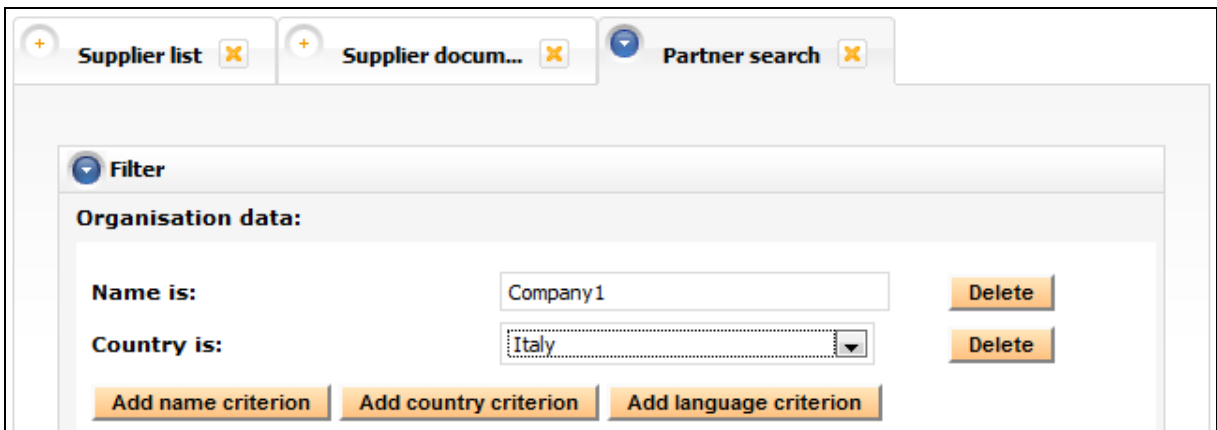


Figure 95-Filter criteria

When the company language criterions are more than one, the supplier can choose the **OR** or **AND** operator among the alternatives.

Figure 96-Add language criterion

Once the supplier selected a logical operator the logical operator is saved for the additional language criterion.

Figure 97-Language criterions

Service data

Click **Add name criterion** or **Add classification criterion** to add an additional criterion to search a service.

When the criterions are more than one, the supplier can choose the **OR** or **AND** operator among the alternatives. Once the supplier selected a logical operator the logical operator is saved for the additional criterions of the same type.

Figure 98-Service data

To insert a service name criterion type the service name you are looking for in the *text-field* and select a language from the drop-down list box. The service name is a keyword to search the service. The percentage between round bracket near a language shows the term quantity available in the language selected (Ex. English(92%)).

Service data:

Name is:

Figure 99-Add service name criterion

To insert a classification criterion click a classification name in the taxonomy. A plus sign next to a folder indicates that it can be expanded to show more folders, a minus sign indicates that it can be collapsed. See [Classification](#) to see the service classification available.

Service data:

Name is:

Classification is:

- (001) agriculture, forestry and fishing
- (002) mining and quarrying
- (003) manufacturing
- (004) electricity, gas, steam and air conditioning supply
- (005) water supply; sewerage, waste management and remediation activities
- (006) construction
- (007) wholesale and retail trade; repair of motor vehicles and motorcycles
- (008) transportation and storage
- (009) accommodation and food service activities
- (010) information and communication
- (011) financial and insurance activities
- (012) real estate activities
- (013) professional, scientific and technical activities
- (014) administrative and support service activities
- (015) public administration and defence; compulsory social security
- (016) education
- (017) human health and social work activities
- (018) arts, entertainment and recreation
- (019) other service activities
- (020) activities of households as employers; undifferentiated goods- and services-producing activities of households for own use
- (021) activities of extraterritorial organisations and bodies

Figure 100-Classification name criterion

Click **Search** to apply the search criterion inserted. Click the partner company name found to visualise the partner general information and the services offered. Select a partner company check-box then click **Send invitation** to invite the company to join the supplier network.

Filter

Organisation data:

Name is: Delete

Add name criterion Add country criterion Add language criterion

Service data:

Add name criterion Add classification criterion

Search

Select	Name ▲	Location
<input type="checkbox"/>	Solving Srl	Via Malavolti 435 - 41100 Modena (Italy)
<input type="checkbox"/>	TEL&CO S.r.l.	Via de' Gavasseti 313 - 41126 Modena (Italy)

Send invitation


⏪ ⏩ ⏴ ⏵ ⏶ ⏷

Figure 101-Search partner

If the company found is already a partner the check-box is not available, an icon indicates that the company is a partner.

Imported term translation

In the **Imported term translation** section are listed the vocabulary label and description translations available. The terms available can be translated from the *lingua franca* (English EU) into the user local language.

Type the **Label (local)** and the **Description (local)** in the *text-field* then click  to save.

To share the translation activity among users with the same local language, once saved the local translation, the labels and the descriptions are distributed and propagated to all the users (with the same local language).



Term list		
Label (local)	Description (local)	Available translations
<input type="text"/>	<input type="text"/>	service solving: <i>service solving</i>
		service solving: <i>service solving</i>
<input type="text"/>	<input type="text"/>	prova num: <i>prova num</i>
		prova num: <i>prova num</i>
<input type="text"/>	<input type="text"/>	uom: <i>uom</i>
		uom: <i>uom</i>
<input type="text"/>	<input type="text"/>	network install: <i>install of cables and devices that compose a data network interface</i>
		network install: <i>install of cables and devices that compose a data network interface</i>
<input type="text"/>	<input type="text"/>	gateway: <i>number of gateway devices</i>
		gateway: <i>number of gateway devices</i>
<input type="text"/>	<input type="text"/>	unit: <i>number of unit</i>
		unit: <i>number of unit</i>
<input type="text"/>	<input type="text"/>	firewall: <i>number of firewall devices to protect network data</i>
		firewall: <i>number of firewall devices to protect network data</i>
<input type="text"/>	<input type="text"/>	dmz: <i>provide a demilitarized zone (dmz) inside network</i>

Figure 102-Imported term translation.



Distributed planning functions

The Distributed planning section allows the company to manage

- The activities in a process model
- The orders received from customers and plan them among the suppliers available for a particular service.

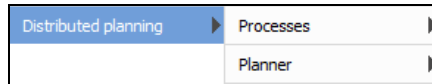


Figure 103-Distributed planning menu.

1.8 Processes

In the **Processes** section the user can create a new activity and can associate the activity to a service offered by a supplier.

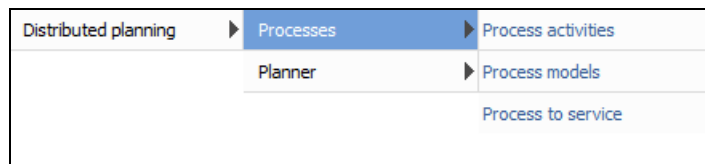


Figure 104-Processes menu.

Process activities

Click **Process activities** in the **Processes** menu, and then click **New activity**.


In the **New process activity** tab type the activity name and description in the *text-field*, and select an activity type from the *drop-down list box*:


- **At customer:** the activity location is at customer site;
- **Custom:** the activity type can be customised on the basis of the customer order;
- **Standard:** the activity duration and cost are already known from the supplier;
- **Latency:** the activity is between other activities, the latency activity delay the next activity.

Click **Save** to store the activity general information.

Figure 105-Process activity type.

Once saved the General information, the **Supplier assignments** section is available.

Click  to assign a supplier to the activity. Select a supplier among the available from the *drop-down list box*, select a service offered by the supplier selected. Edit the recharge cost in percentage on the final service cost offered to a potential customer.

Click  to save the assignment.

Click **New assignment** to add a new supplier to the activity.

Select the assignment *check-box* then click **Delete** to cancel the assignment saved.


Select	Supplier	Supplier product	Recharge (%)	Edit
<input type="checkbox"/>	TEL&CO S.r.l.	TES_NTW	10	

Figure 106-Supplier assignments.

Process models

A process model is composed by activities. Click **Process models** in the **Processes** menu, and then click **New process model** to create a process description. In the **New process model** tab type the model name and description in the *text-field*. Click **Save** to store the model general information.

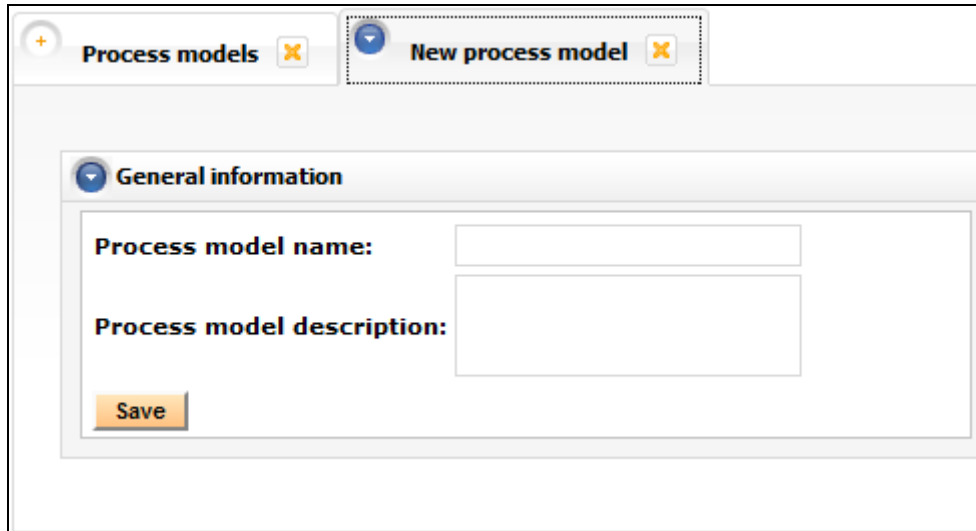


Figure 107-New process model.

In the process activity section click **Add activity** to select an activity among the available. Click **Save** to insert the activity in the process model.

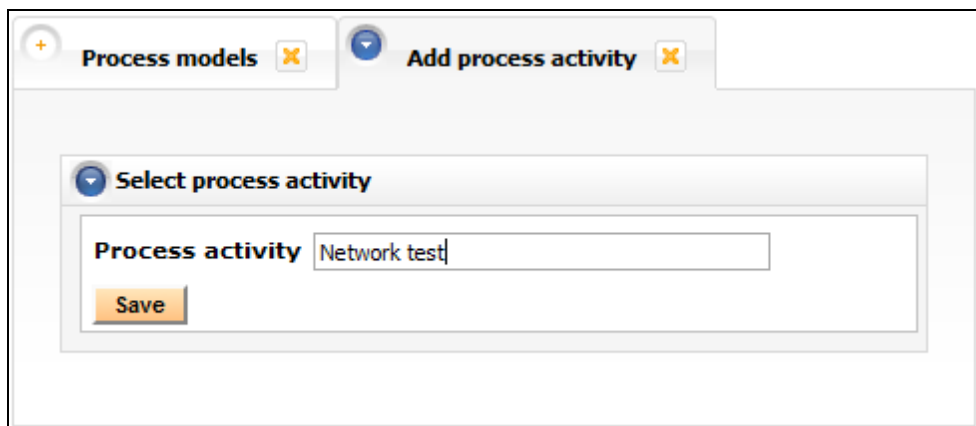


Figure 108-Add process activity.

Once saved the process activity selected is inserted in the process model activities.

General information

Process model name: Network installation

Process model description: process model for install a network at customer

Save

Process activities

Select	Name	Description	Type	Quantity	Duration
<input type="checkbox"/>	Device assembly	Assembly of all network devices like gateway, firewall, VPN router, ec..	At customer	1	36
<input type="checkbox"/>	Network test	testing of all network features and devices	At customer	1	59

Add activity Preview Delete

Figure 109-Process model activities.

Click a process activity name to visualise the activity details.

Type the activity duration in the **Duration text-box**, the duration time edited is an estimate of the activity duration. The real duration is automatically updated on the basis of the supplier feed-back about the activity duration.

Type the activity cost in the **Cost text-box**, the cost edited is an estimate of the activity cost. The real cost is automatically updated on the basis of the supplier feed-back about the activity cost.

Type the number of time the activity must be done in the process in the **Quantity test-box**.

If the activity selected is the first activity to be done in the process check the **First** check-box, else click **New precedence** and add the activity to be done before.

Process models Network test

General information

Process activity name: Network test

Process activity description: testing of all network features and devices

Process activity type: At customer

Duration: 0

Cost (EUR): 0.00

Quantity: 1

First:

Save Return

Activity precedences

Select	Process activity name	Process activity description	Process activity type	Edit
--------	-----------------------	------------------------------	-----------------------	------

New precedence Preview Delete

Figure 110-Complete a new process activity.

The activities can be sequentially and in parallel. If two activities have the same activity precedence the activities are in parallel.

Click **Preview** to visualise the activity precedence schema.

General information

Process activity name: Network test
 Process activity description: testing of all network features and devices
 Process activity type: At customer
 Duration: 59
 Cost (EUR): 275.00
 Quantity: 1
 First:

Activity precedences

Select	Process activity name	Process activity description	Process activity type	Edit
<input type="checkbox"/>	Device assembly	Assembly of all network devices like gateway, firewall, VPN router, ec..	At customer	

Buttons: Save, Return, New precedence, Preview, Delete

Figure 111-Activity precedence.

The preview shows the activity precedence. Click **Close preview** to close the schema.

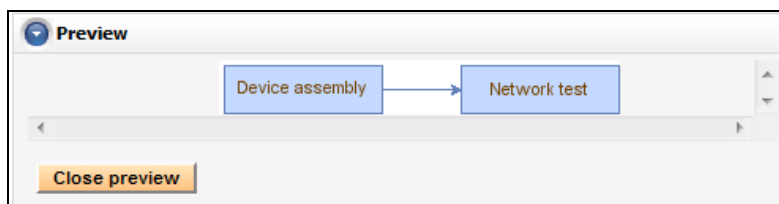


Figure 112-Show activity precedence.

Process to service

In the **Process to service** section are listed the services offered. See [Service list](#) in My catalogue section to change the service status.

Click to open the process model list.

Trade name	Label	Description	State	Has processes	Processes	Parameters
SOLV_NET_INST	network install	install of cables and devices that compose a data network interface	Published	Yes		Set mappings

1 / 1

Figure 113-Service list.

Select the process model to assign, edit the recharge cost in percentage, and select the priority.

The priority is a process model choice coefficient that indicate the process model the company prefer.

Then click **Save**.



Select	Process model name	Description	Recharge (%)	Priority
<input checked="" type="checkbox"/>	Network installation	process model for install a network at customer	0	A

Figure 114-Process model list.

Click **Set mappings** to map the service parameter with the service parameters of the suppliers.

Click a parameter name to map the parameter. Select an option among: Fix value, Map, Open.

Fix value

Select fix value to have always a fixed characteristic. In the example the server fixed value is always Apache. Click **Save** to store the information.

Activity	Supplier	Service	Parameter name	Parameter description	Parameter type	Mapping status
Housing	TEL&CO S.r.l.	SI-HOSTING	server	hosted server	Enumerative parameter	Fixed
	TEL&CO S.r.l.	SI-HOSTING	database	hosted database	Enumerative parameter	Fixed

Parameter mappings [server]

Fix value Map Open

Supplier parameter label: server

Supplier parameter description: hosted server

Supplier parameter type: Enumerative parameter

Supplier parameter value: apache

Figure 115-Fix value parameter.

Map

Select Map, then click **New mapping** to associate the service parameters to the supplier service parameters.

Click **Save** to store the mapping.



Parameter mappings [server]

Fix value Map Open

Supplier parameter label: server
Supplier parameter description: hosted server
Supplier parameter type: Enumerative parameter

Mapping constraints:

Select	My parameter			Supplier parameter		
	Name	Parameter type	Value	Name	Parameter type	Value
<input type="checkbox"/>	dmz	Enumerative parameter	yes	server	Enumerative parameter	internet information services

Save New mapping Delete Discard

Figure 116-Mapping parameters.

Open

Select Open, to associate the supplier parameter to the service parameters. If the service parameter is not defined the company parameter will coincide with the supplier parameter.

Parameter mappings [server]

Fix value Map Open

Save Discard

Figure 117-Open parameter.

1.9 Planner

The Planner section allows the user to plan the order line received and accepted.

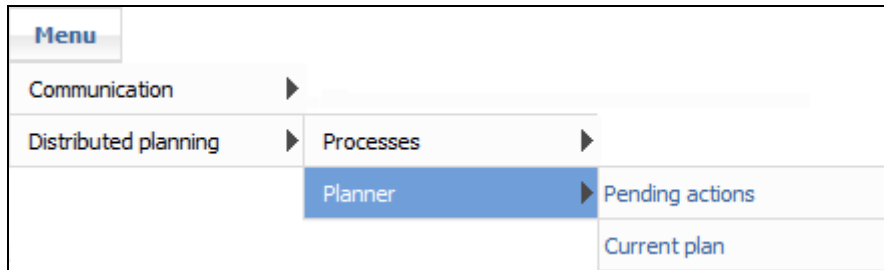


Figure 118-Planner menu.

Pending actions

In the **Pending actions** section visualise the list of the accepted order line. (See [Customer documents](#))

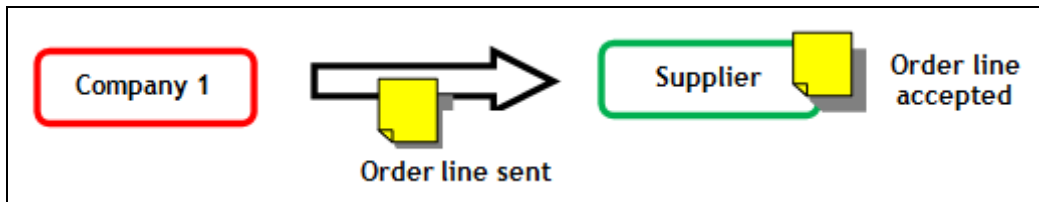


Figure 119-Order line accepted.

The company (once accepted an order line) has to plan the order line.

When the company (Supplier in green) receives an order line from a customer has a **supplier role**. When the company plan the order line with its suppliers has the **customer role** (Customer in green in figure).

The company plan the order line received sending the single activity inside an order line to his own suppliers.

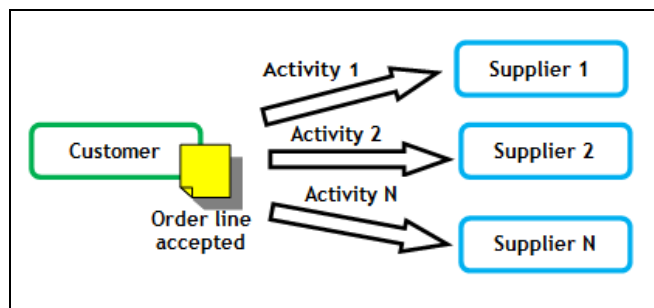


Figure 120-Plan an order line.

The order line received from a customer and accepted by the supplier can be planned.



Click **Plan** to plan manually the order line,

Select	Number	Customer	Product name	Quantity	Issue date	Due date	Document type	Planning
<input type="checkbox"/>	O13.00021/01	CIONTI SRL	LOGISTICA	10	Fri 21 Jun 2013, 17:51	Fri 28 Jun 2013, 17:50	Order	Plan

Figure 121-Plan a pending request.

Plan an order line manually (Company_Customer side)

Each activity is composed by one or more processes. In the process activity section assign each process to a supplier, select the **Enabled** check-box to include the activity to the plan.

Click  to assign a supplier to the process, click  to save.





Process activities									
Process activity name	Process activity type	Assigned supplier	Duration (h)	Cost (EUR)	Start time	End time	Status	Enabled	Edit
Device assembly	At customer	TEL&CO S.r.l. - NET					Pending	<input checked="" type="checkbox"/>	
Network test	At customer	TEL&CO S.r.l. - TES					Pending	<input type="checkbox"/>	
Housing	At customer						Pending	<input type="checkbox"/>	
HelpDesk	At customer	TEL&CO S.r.l. - SOL-HELPDESK					Pending	<input checked="" type="checkbox"/>	

Figure 122-Assign a supplier to a process activity.

When all the processes are assigned to a supplier, click **Generate plan** to send the first process activity to the first supplier selected.

If the supplier selected has accepted the process activity sent by the customer, the supplier have to schedule the process activity in the **Internal scheduling** section. See [Reply to an order](#) and [Scheduler](#) for more details.

Once a supplier accepted and schedule an order activity, the **Duration** in hours, the **Start time**, the **End time** are sent to the customer.

The customer in the **Supplier documents** section can visualise the order accepted by the supplier. See [Supplier document](#).

The second order line is sent automatically to the second supplier selected, and so on for each process activity.

Activity Instances							
Process activity	12/1/2011	13/1/2011	14/1/2011	15/1/2011	16/1/2011	17/1/2011	18/1/2011
Device assembly	[Gantt chart bars]						
Network test	[Gantt chart bars]						

Previous Next



Process activities									
Process activity name	Process activity type	Assigned supplier	Duration (h)	Cost (EUR)	Start time	End time	Status	Planned	Edit
Device assembly	At customer	TEL&CO S.r.l. - NET_INFR	28	506.25	Thu 13 Jan 2011, 11:00:00	Fri 14 Jan 2011, 15:45:00			
Network test	At customer	TEL&CO S.r.l. - TES_ITW	67	250.00	Fri 14 Jan 2011, 15:45:00	Mon 17 Jan 2011, 11:15:00			

Figure 123-Process activity planned.

When all the activities have been replied by the suppliers, click **Planned** and click **Confirm plan** to confirm the plan.

In the customer documents the order status is in **Planned**, click the order then click the order line and click **Confirm**, **Abort** or **Raise Exception**. See [Customer documents](#) for more details.

The customer in the **Supplier documents** section can visualise the order accepted by the supplier. See [Supplier document](#).



The second order line is sent automatically to the second supplier selected, and so on for each process activity.

In the customer documents the order status is in **Planned**, click the order then click the order line and click **Confirm**, **Abort** or **Raise Exception**. See [Customer documents](#) for more details.