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Final LISE Service – Version Three

D2.2.4 – Business Utility Interface

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1. Document Information

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Revision History

Revision	Date	Author	Organisation	Description
1.0	**10 February 2013**	**Michael Wetzel**	**ESTeam**	**1st complete draft**
1.1	**21 February 2013**	**Michael Wetzel**	**ESTeam**	**Finalisation**
	22 February	**Tanja Wissik**	**UniVie**	**Formal Review**

Statement of originality:

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

2. Table of Content

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4. Executive Summary

When originally incepting LISE in 2010 it was envisaged to build parts of an ERP system into LISE: account management, order and invoice management system. Upon writing of this document particularly the latter two (order management, invoicing) are not applicable to LISE. The – relatively exclusive – nature of the LISE service does not require a general purpose billing and invoicing software. On the other hand, user management capabilities have been implemented in LISE and are available since 2011 – see D2.2.1 First LISE Service Version, D2.2.2 Second LISE Service Version and D2.2.5 Human Support Interface. Reporting and activity logs are now part of the ESTeam Tools and available to users and managers.

5. Discussing ERP Capabilities of the LISE Business Utility Interface

"The Business Utility Interface handles account, order and customer management, as well as invoice management." – When looking at the top level LISE workflow, one could initially identify three hooks where the ERP parts of the Business Utility Interface could have been useful:

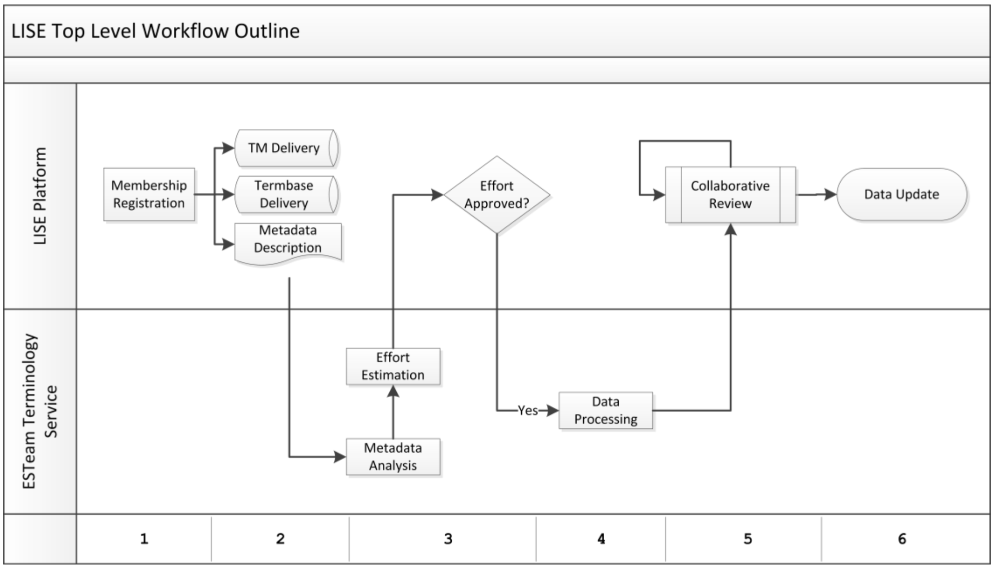

Figure 1 – Top Level LISE Workflow

1) **Membership registration**: In phase one, a new customer is identified and new members are registering on the site.
2) **Effort estimation and approval**: In phase three, ESTeam Terminology Services have analyzed the data and can develop a quote, so that it could come to approval, i.e. the service order.
3) **Billing** (not in the graphic): Services are being charged to the customer

Membership Registration

An organization becoming a potential customer of LISE is registering itself and users, so that data and information exchange can start. This aspect of the Business Utility Interface has been developed as part of D2.2.1 and is available since 2011 (M6).

Effort Estimation and Approval

ERP functionality, i.e. customer and invoice management, would be mainly visible during this phase of effort estimation and approval. But LISE is a heavily customized service (see D6.3 Exploitation Plan). Therefore, a general purpose customer and invoice management is not applicable. There are two major reasons:

1) Always changing business parameters: Experiences with OHIM (before LISE) and now in LISE with IATE show that customizing the ESTeam Language Server and the ESTeam

Tools bring up very different parameters of effort, so that a standard way of billing and invoicing is difficult to derive.

2) Preference of in-house ERP: For the potential contract partners (customer on the one side and LISE partners on the other side) existing in-house ERP systems will prove more efficient than using the LISE platform for this.

Billing

Similar to effort estimation and approval, billing would rather be managed via in-house ERP systems than via the LISE platform.

Conclusion

As it stands ERP functionalities are not useful for LISE. Therefore, it has been decided not to implement the LISE Business Utility Interface with ERP functionalities and target the labor effort where it is more useful, namely towards providing a better result on the IATE data for the IATE users.

6. User Capabilities of the Business Utility Interface

Help Desk in the Collaboration Portal

The LISE Collaboration Portal realizes the major part of a “Help Desk” functionality. The portal can be customized right to the needs of the users, for instance by creating areas tackling user / support questions. Today’s version for instance has a category labeled *Terminology Advice*, to provide user help for terminology questions. Yet, this is an example and totally customizable to organisations’ needs; see at the bottom of Figure 2.

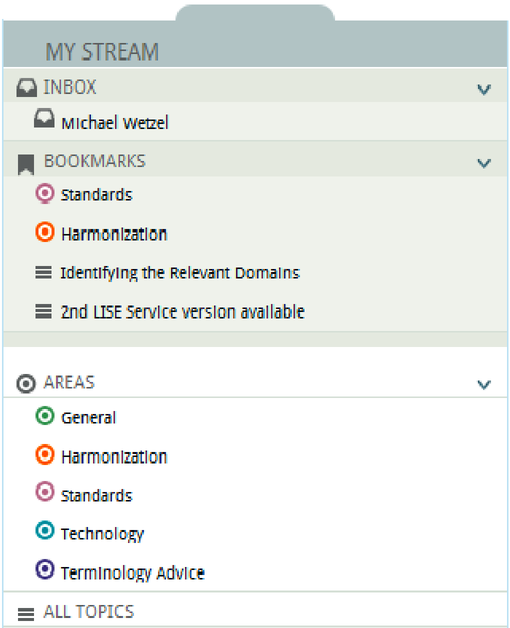

Figure 2 – "Terminology Advice" area in the Collaboration Portal

Going beyond the pure discussion and collaboration functionalities of the LISE portal, one new functionality was required to model and complete such a help desk / ticketing system. This was to include the possibility to close a topic, respectively the so-called *ticket* (as it is called in Help Desk / Incident Tracking software terminology). This feature has been added in this version.

Tracking and Reporting in the ESTeam Tools

All three ESTeam Tools saw several changes to include tracking and reporting capabilities. They have already been extensively used during and after the workshop with the IATE users.

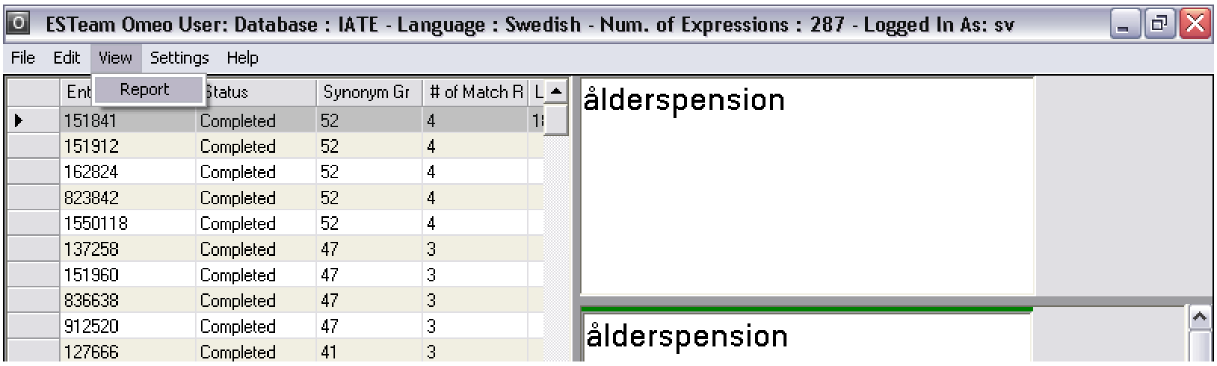

Figure 3 – Creating a Report in OMEO, after Swedish Review

For instance, in ESTeam OMEO a user can call the report functionality, which would then create a textual file listing the changes and the progress:

Date: 06/02/2013, Time: 16:15:57

Database: IATE
Language: Swedish
Type: INTERNAL MATCHING
First Visited: 1 Days, 3 Hours, 49 Minutes Ago
Status: In Progress (100% Completed)

Statistics:
Total Number of Expressions: 287 (259 Automatically Completed, 28 Manually Completed, 0 In Progress)
Number of Expressions with Spell Errors: 0
Number of Spell Errors: 0 (0 Checked, 0 Pending)
Number of Matching Alternatives: 199 (199 Accepted, 0 Rejected, 0 Pending)

Figure 4 – Dump of ESTeam OMEO report; Swedish, after IATE workshop

This report from ESTeam OMEO, as well as similar ones from ESTeam Cleanup and ESTeam Fillup, is not only created for the users but it provides also the key input to the quantitative analysis within LISE WP4.

7. Summary

A built-in customer and invoice management system, taking over capabilities of existing ERP systems is not applicable to LISE. The LISE platform and the ESTeam Tools have now realized the other parts of the Business Utility Interface (help desk features, reporting, error and activity log).