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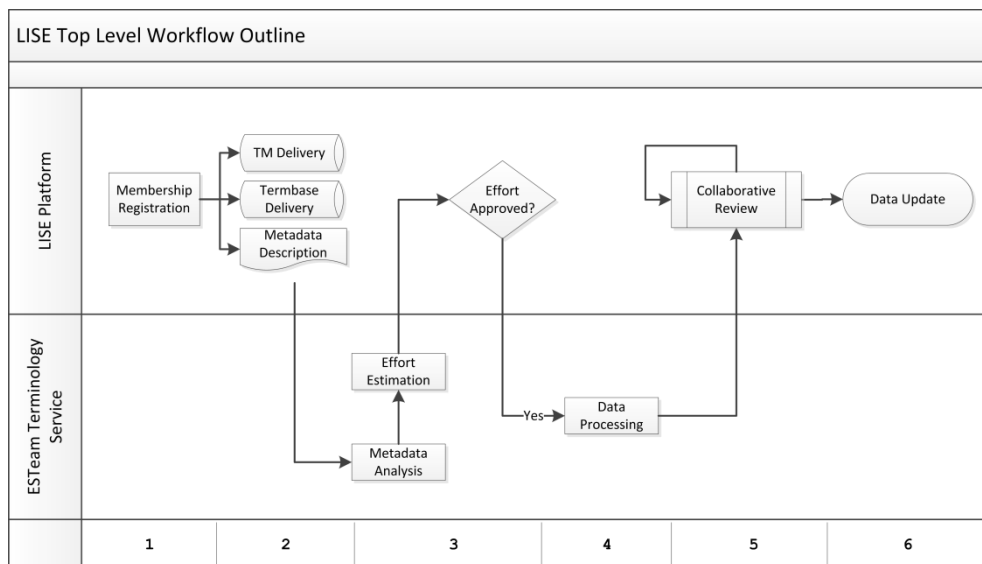
4. Executive Summary

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 today. The still 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 ETeam Tools and available to users and managers.

LISE technology has a future in Coreon, though. For phases two and three of the LISE exploitation (see D6.2 LISE Exploitation and Business plan) some ERP functionalities are indeed developed as part of Coreon.

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.” (see DoW, p. 8) – 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:



1 – Top Level LISE Workflow

- 1) **Membership registration:** In workflow phase one, a new customer is identified and new members are registering on the site.
- 2) **Effort estimation and approval:** In workflow 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 as user, 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 in its first exploitation phase is a heavily customized service (see D6.2 Exploitation Plan). Therefore, a general purpose customer and invoice management is not applicable. There are two major reasons for this:

- 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.

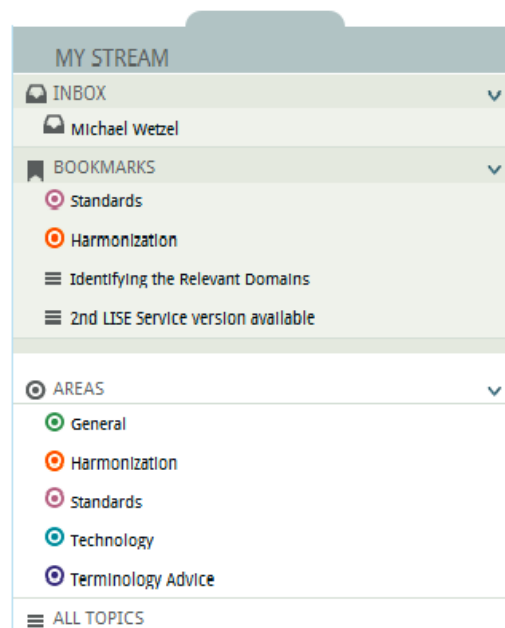
Conclusion

As it stands ERP functionalities are not useful for LISE in exploitation phase one. 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 during the LISE project, 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 an organizations’ needs; see at the bottom of 2.



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 this 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.

ESTeam Omeo User: Database : IATE - Language : Swedish - Num. of Expressions : 287 - Logged In As: sv

Ent	Report	Status	Synonym Gr	# of Match R	L
151841		Completed	52	4	1
151912		Completed	52	4	
162824		Completed	52	4	
823842		Completed	52	4	
1550118		Completed	52	4	
137258		Completed	47	3	
151960		Completed	47	3	
836638		Completed	47	3	
912520		Completed	47	3	
127666		Completed	41	3	

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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)

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.

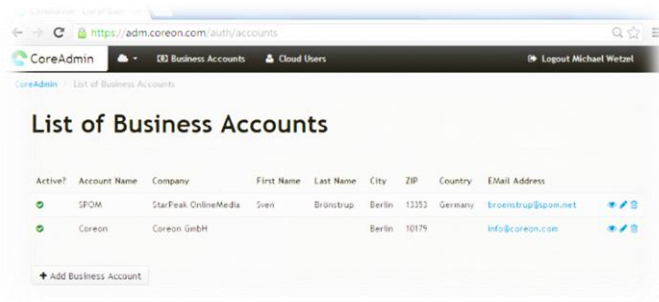
7. Business Utility Interface Capabilities in Coreon

The exploitation plan (D6.2) outlines a three phased approach to market LISE and to create revenue from its value:

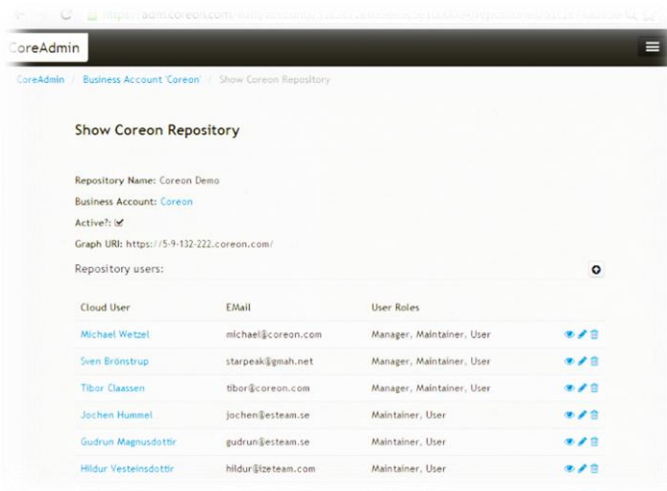
- 1) LISE as a Service: LISE technology is available a service offering through LISE partners. Every customer requires an individual custom approach.
- 2) LISE through Coreon: LISE technology become modules in Coreon, a separate new product offering in the terminology and taxonomy management market.
- 3) Towards Commoditization: Data cleaning and collaboration features that were new with LISE are more and more becoming a standard in tools like Coreon, which plays the role of a reference implementation in the language technology space.

During phase 1) ERP functionalities are not applicable (see the discussion above). Yet, with phase 2), as part of Coreon, several ERP and related capabilities are required. Coreon is a Software-as-a-Service offering. By its nature, such a software product comes with account management, billing and reporting functionalities. It has been developed from its very beginning with multi-tenancy in mind.

Coreon acts like a host for LISE technology. While LISE adds unique value to Coreon, the Coreon environment vice versa helps to efficiently productize LISE. In this context we see account and administration functionalities like the following:



5 - Coreon List of accounts



6 - Coreon repository access list

A system administrator gets an overview of all set up business accounts (known as *tenants* in SaaS-terminology).

Inspecting a repository (termbase) of an existing business account (here 'Coreon' as the company itself) for instance lists all the users that have access to this repository and also their respective roles.

While this is currently exclusive, the Coreon cloud and Software-as-a-Service administration functionality is immediately of benefit to the LISE audience when LISE technology merges into Coreon.

LISE and Coreon come together. This addresses one of the weaknesses of LISE that are tackled with top priority: separateness of LISE technology and master data (see D6.2 Updated Exploitation and Business Plan). ERP functionality is not applicable to LISE when it is still in phase one of the exploitation, namely as a pure service offering. But ERP aspects are required when it becomes part of a product offering in Coreon. And this way is already paved.

8. Summary

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

When LISE technology arrives in Coreon then several ERP functionalities are immediately available for users and managers.