Solution Portal Short Introduction

User Guide

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Version	Datum	Name	Kommentar
1.0	05.06.2017	I. Hanselmann	Initial Version
1.1	27.10.2017	I. Hanselmann	New TecAlliance Corporate Design

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Description
Short introduction to the basic concepts and usage of the Solution Portal

1   Introduction

The TecCom Solution Portal is used for the central administration of organisations, users and business relationships for the solutions e-invoicing (TecInvoice), Collaborative Data Management (TecCMD), Warranty Process (TecWarranty), Collaborative Managed Inventory (TecCMI), TecBusinessMonitor and Authenticity Check (TecIdentify).

At the same time, it enables users of e-Invoicing, Warranty and TecBusinessMonitor business processes to use these solutions directly via the user interface and to check transactions within the solutions.

The portal adds the setting up of customers for the Order solution (TecOrder), which are generally administrated in other systems, only for certain use cases. This is the case if the products BasicSupply and TecOpenMessaging are used within the framework of the Order solution.

Finally, the portal allows TecAlliance employees to monitor the overall functioning of the portal, globally enable or disable users and organisations, modify status messages and, in particular, perform the above-mentioned data maintenance on behalf of customers.

Solutions / Actions within Solution Portal	Administration of Users, Organisations	Administration of Business Relations	Integrated Use and Transaction Monitoring of the Solution	Additional Configuration of Special Cases (TOM, BasicSupply)
Warranty Process (TecWarranty)				n / a
e-Invoicing (TecInvoice)				n / a
Business Monitor				n / a
CMD			CMD Website CMD Client	n / a
Authenticity Check (TecIdentify)		n / a	TecIdentify Website	n / a
CMI		xml config files	Cockpit-Software via Remote Desktop	n / a
Order (TecOrder)	BR Explorer, OrderPortal, TecLocal, TecConnect, TecOrder Web	BR Explorer, OrderPortal, TecLocal, TecConnect, TecOrderWeb	OrderPortal, TecLocal, TecOrder Web, TecConnect, NRTools	

Figure 1: Using Solution Portal via the Solutions

The Solution Portal the successor of TecCom Workplace and basically provides the same functions, but in a modernised and more efficient user interface.

2   Basic Terms

User:
It is advisable to first define the necessary users. There are generally two user roles for customers, an administrator (admin) and a standard user (user). The users are always assigned 1-to-1 to an organisation. Bear in mind that rights to sub-organisations are generally inherited. The user "by_admin" is not only the administrator of the organisation "by", but is also the administrator of the sub organisations "by.uk" and "by.fr".

Inherited rights can then be further restricted individually for each user by an authorized administrator. Administrator "by_adm" can thus, for example, implement restrictions so that the user "by. uk_user" may only use certain solutions.

Organisations:
Usually, you are either the buyer or supplier and you establish business relationships with various partners who have the opposite role in each case. Thus, only the organisational scope of the buyer or supplier is of interest to you.

If you actually have the role of the buyer at one time and the role of the supplier at another time, we recommend that you do not manage this via the same organisation (or sub-organisation), but use separate organisations instead.

Business Relationships:
Business relationships are always entered into by one buyer and one supplier, and never by two buyers or two suppliers. In the portal, the roles "BPUser" (buyer) and "BPSupplier" (supplier) are used for this purpose.

Solutions (Roles and Services):
In the portal, solution roles and services are displayed in the form of lists at various points, which can be confusing. The following diagram distinguishes between roles and services on the one hand and then groups those elements that logically belong together.
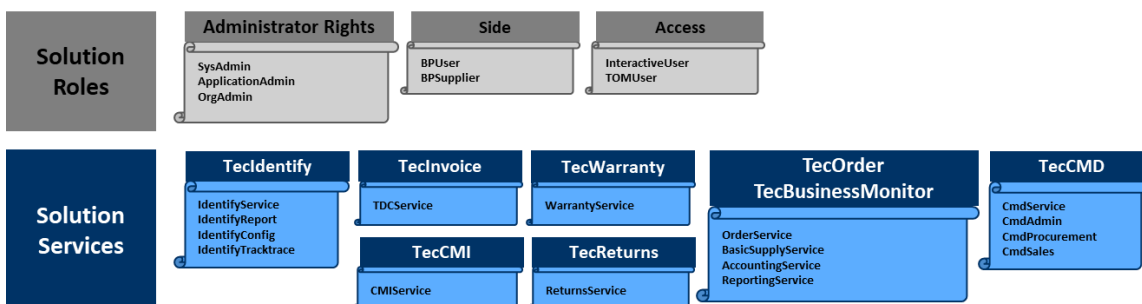

Figure 2: Roles and Services

Administrator rights: Here, SysAdmin and ApplicationAdmin are reserved for TecAlliance administrators (TA admins). Administrators on the client side are assigned only the OrgAdmin role. Standard users are not assigned a governance role.

Side: BPUser and BPSupplier can be assigned equally to an organisation or a user. However, this should generally be avoided as already mentioned.

Access: A user can log in to the Solution Portal only if he has enabled InteractiveUser. The TOMUser attribute is mandatory if the user wants to use the TOM Web service in one of the solutions.

Solutions Services: To actively use a solution, at least one service must be activated from the respective block. The issue as to which services must be activated under which constellations will be discussed later in this document.

⚠️ For assistance in designing your scenario, please contact our Customer Support. Our Customer Support administers for you Organisations, Users and Business Relations with the necessary rights and roles and according to your requirements.

3   The Login Page to the Solution Portal
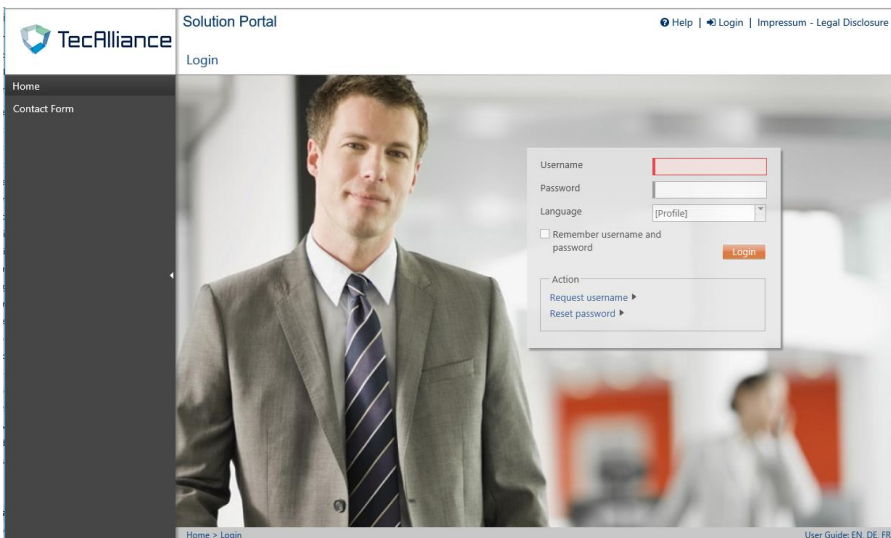
The portal of the live system supports the current browser versions of Internet Explorer, Firefox, and Chrome.

You can access it via **www.solutionportal.tecalliance.net**.

⚠️ Please note that the URL prefix "staging-solutionportal...." does not forward you to the live system, but to a test system. If you cannot log in, even though you think you have used the correct login data, this could be the reason.

3.1 Selecting the Language

The login page can be displayed in a different language by means of the "Language" drop-down menu. If a user logs in, the selected language is also used for this session.

The portal supports the following 14 languages:

🇩🇪 German	🇬🇧 English	🇫🇷 French	🇬🇷 Greek	🇮🇹 Italian
🇳🇱 Dutch	🇵🇱 Polish	🇵🇹 Portuguese	🇷🇺 Russian	🇸🇰 Slovak
🇪🇸 Spanish	🇨🇿 Czech	🇹🇷 Turkish	🇭🇺 Hungarian	

If the selection [profile] is retained, the login takes place in the language which is stored in the respective user profile. You can change the language in the user profile at any time after logging in.

3.2   Initial Registration / Resetting Login Data

If you do not have a user account yet, please contact the administrator within your organisation or contact our Customer Support.

If you no longer remember your username, you can use **Request username** to request that it be sent to you via e-mail to your registered e-mail address.

If you only want to reset your password, use the **Reset password** function. After entering your username, you can have a new password sent to your registered email address.

3.3   Login Process

To log in, please enter your username and password. If you select the appropriate checkbox, your browser remembers this data the next time you log in and automatically fills in the fields.

3.4   Contact Form

Only the function "Contact Form" is available in the navigation bar before login. Here, you can contact our Customer Support directly about various issues, including organising your initial registration.
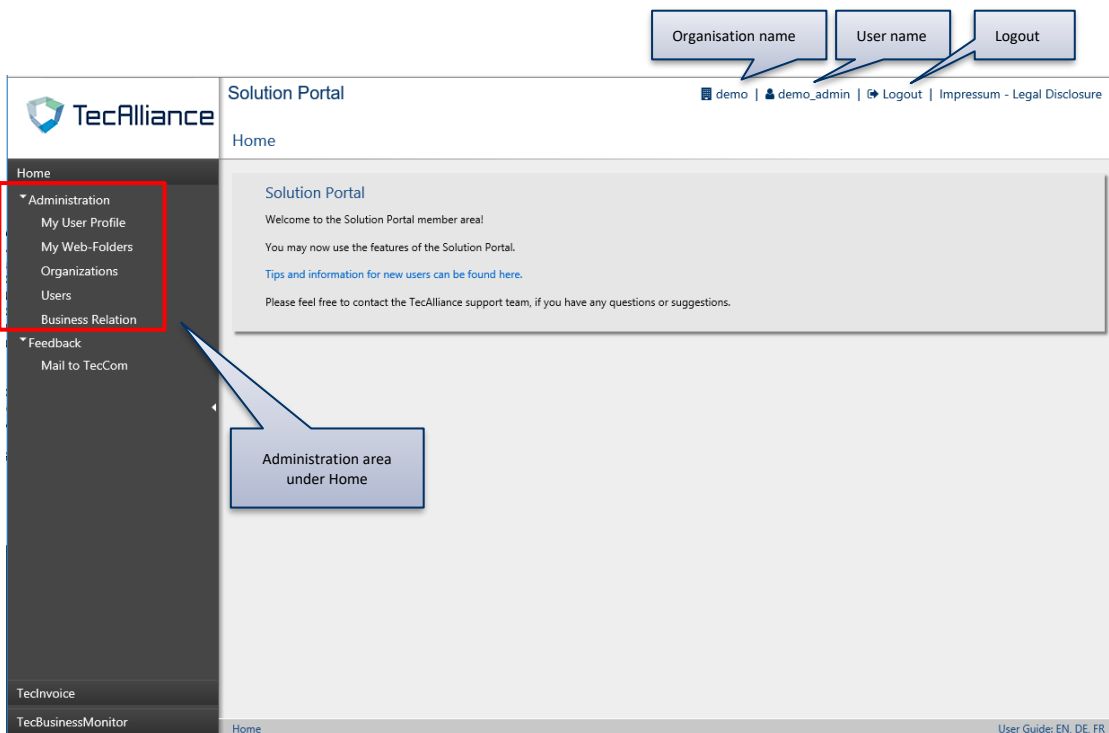
3.5   Login

By clicking on **Login** (top right), you can return to the initial screen.

4   Portal Page after Login

After logging in successfully, the portal page is displayed in its basic form. The standard elements will now be explained by means of examples.

4.1 Standard Elements in the Identification and Navigation Area

4.1.1   Identification

In this case, the login took place using an administrator ("demo_admin) in the "demo" organisation. This data can be seen at any time in the identification area (top right).

4.1.2   Logging Out

Beside the organisation and username is the **Logout** link, which allows the user to log out immediately. As the system is aimed at experienced users, we refrained from incorporating too many security questions. Clicking on Logout or on any other hyperlink will then execute the desired action essentially without prompting.

4.1.3   Home (Administration Area)

The Home area includes all functions that are necessary for the administration and configuration of users, organisations, and business relationships.

4.1.4   Integrated Solutions

The integrated use and transaction tracking of individual solutions is possible by clicking on the respective solution. The rights of the user who is logged in and the organisation to which he belongs determine the solutions that are available to him. The maximum set of solutions can be derived from the list in Figure 1, which is outlined in the introduction to this document.

If you would like documentation on the use of individual solutions (for example, Warranty process), please contact Customer Support.
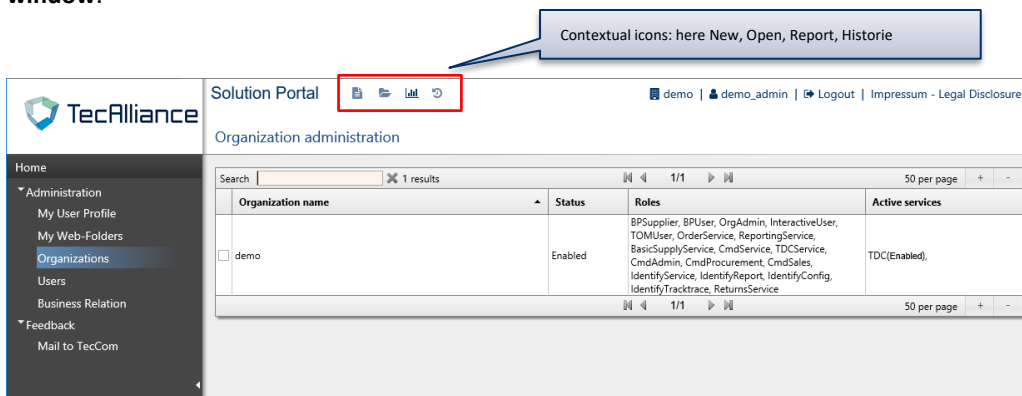
4.2 Standard Elements of the Content Area

The Solution Portal is characterised by the use of standard elements. The most important of these will now be explained. Some important isolated changes have been made here with respect to the usability in the old Workplace.

4.2.1   Toolbar and Contextual Icons

Hyperlinks are indicated in blue in the Content area to separate them from the rest of the text.

A toolbar with contextual icons, which often lead to variations of a process, **is always displayed at the top of the window**.

Here is an example for "Organizations":
In this case, you must first select an organisation. You can then use the enabled icons to select whether a new organisation should be created (New), the selected organisation edited (Open), an export (Report) of the table with all selected organisations stored in the Web folder (see navigation bar) or a change history displayed (History).

4.2.2   Forms and Buttons

Forms are often displayed if a user actively opted for a specific action. In this case, the user wants to change the data of a specific organisation.
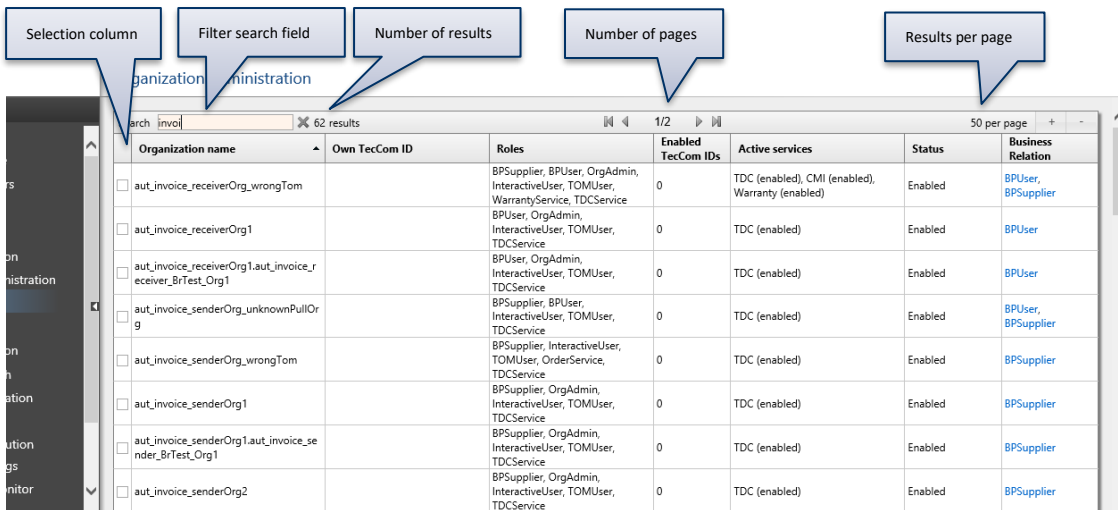

Forms in edit mode have the following characteristics:

- The user can essentially navigate freely between the various tabs (a major change with respect to the previous version of the Solution Portal)
- The active field is filled with orange colour: here the country field with data "Germany".
- Content validation: Required fields are indicated by a wider left margin. If they are not filled, a warning mark is displayed, as indicated above for the "Street" field (Input required!)
- The buttons support the correct step-by-step navigation through the individual pages of the form. The labelling depends on the form. Grey buttons cannot be clicked, while blue buttons basically support the navigation through the form. Orange buttons are of a final nature and terminate a process.
- **Actions** are highlighted in blue.

If individual fields or all elements of a form are greyed out, the user has no modification rights to the field or data record, but only read authorization.

4.2.3   Tables and Filters

Tables provide an overview list of information in a structured form.

Tables are also characterised by recurring structural elements. These are as follows:

- Filter search field: The Filter search field enables the immediate limitation of the displayed values. In this case, a search by "invoi" is sufficient to exclusively display organisation names with this string. Wildcard characters are not used. Clicking on the x deletes the content of the Filter search field, but not the results displayed in the table.
- "Number of results" shows the number of results found based on the filter.
- Pagination: Since one page is sufficient for displaying the filtered results in this case, "1/1" (1 of 1) is displayed.
- *Per page* specifies the maximum number of rows which can be displayed. The user can make changes here using + and -. This setting is reset when you exit the table.
- Pagination und *Per page* are also displayed at the foot of the table.
- The table can be sorted by individual columns; a second click inverts the sorting. This setting is reset when you exit the table.
- You can use the selection column to select one or more records depending on the table. These are thus selected for follow-up actions, which are launched via the toolbar.

The width and height of individual columns cannot be changed.

4.2.4   Info Panels

Info Panels are mostly displayed as an introduction to larger, separate areas within the portal. An example of this is the home page, which is displayed directly after the login.