SPX Management Information System (MIS) Manual

For SPX Office Personnel

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UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

UNIDO Subcontracting and Partnership Exchange (SPX) Programme

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1 Introduction to the SPX MIS

This manual shall guide the reader through the use of the Management Information System (MIS) of the United Nations Industrial Development Organization's (UNIDO) Subcontracting and Partnership Exchange (SPX) Programme. The manual aims to be a comprehensive guide covering all functionalities of the MIS; however, it is a living document since the development and improvement of the system is a continuous and unbounded process.

The MIS has two objectives: firstly, it works as a platform connecting main contractors and subcontractors – aiming at integrating the supply and demand of both parties to set up a more effective industrial chain. By accessing the MIS and its underlying database, the subcontractors are supplied with worldwide information on industrial subcontracting, facilitating the creation of new business opportunities. Secondly, it is a tool for the SPX Office Personnel to manage and monitor the SPX Programme in the specific country, contributing to the important promotion of industrial subcontracting.

1.1 The Reader of the Manual

This manual is intended for the use of SPX Office Personnel, in most cases the SPX Office Manager and SPX Officers. The content may be distributed to the companies in the SPX Programme, but the SPX Office Personnel should assist the companies in finding the right information.

1.2 Structure of the Manual

The manual is divided into eight chapters, plus an additional two annexes. Chapter 1 gives an introduction to the SPX MIS while Chapter 2 explains some basic features of the system, such as the search function and how to register as a new user. Chapters 3-6 consist of the four main menu options in the SPX MIS internal platform, namely: "Home", "Administration", "SPX" and "Preferences". Each Chapter then entails subchapters corresponding to its sub-menus in the system. Chapters 7-8 describe the external view of the platform, as seen by buyers, suppliers and service providers.

1.3 Internal and External Platforms

Each SPX Office has two platforms within the MIS, one *internal* and one *external*. The internal platform is used by the SPX Office Personnel, and the external platform is used by the buyers, suppliers and service providers participating in the SPX Programme. The general look of the two platforms is more or less the same, but the features slightly differ. The features available for the respective platform are listed in Table 1 below.

Table 1 - Features of internal and external platforms

	Internal	External
Users	SPX Office Personnel, SPX HQ	Buyers, suppliers, service providers
Features	- Management of - Users - Areas - Projects - Regions - Support documentation - Certification suggestions - Activities - Activity categories - RFQs - Creation of - Company profiles - Document library - Library catalogues - Company shortlists	- Register users - Change e-mail and password - Request company information edits - Search company profiles - Submit RFQs - Review RFQs

1.4 Roles and Authorization

The role of the user will decide the authorization given when accessing the system. For instance, while the administrative SPX Head Quarters accounts can access the databases of all countries participating in the SPX Programme, an SPX Office Manager will only see the information of own country. Furthermore, buyers and suppliers can search for other companies in the database, but are not authorized to access the full contact details of these companies. **In this manual, the default account is that of the SPX Office Manager on the internal platform, if not otherwise specified.**

1.5 Browser Requirements

The SPX MIS is built for newer versions of the most widespread web browsers. To ensure compatibility with the system, the user is recommended to use any of the following – or higher – browser versions:

- Mozilla Firefox 3
- Internet Explorer 8
- Opera 11
- Safari 5
- Google Chrome 10

2 Basic Features

This section provides the user with guiding steps for the basic functionalities: how to log in to the system; how to register as a new buyer/supplier/service provider user; how to use the search function; how to obtain help if a problem occurs; and how to submit feedback regarding the SPX MIS.

2.1 Login

Each SPX Office has its own login page, and in some countries different industry sectors also have their own pages and platforms. In essence, the login page consists of a single box as pictured below in Figure 1.

Figure 1 - Login page for external platform

- The left side displays the specific SPX Office and, in some cases, the industry sector.

- In the middle, the user can find the login function. To log in, the user name and password must be properly entered in the text fields, before clicking the "Login" button. The user name and password are provided the user upon registration, see chapter 2.2 for further instructions. When entering the user name and password, it is important to make a distinction between upper and lower case letters. By selecting the "Remember Me" check box, the web browser will store the login information for future sessions.

- On the right, the internal and external platforms look a bit different. On the internal platform used by the SPX Offices, the user will only find the option to reset the account password. For the external one, as depicted in Figure 1, the buyers, suppliers and service providers find the options (further explained in the list below) to create a new user, to validate a new account, and to reset the password of an account.

  1. A buyer, supplier or service provider new to the system, wishing to register, should click the "Create User" link and follow the instructions in chapter 2.2.
  2. A buyer, supplier or service provider that have received a validation code but have not yet logged in for the first time should click "Validate my User" and follow the instructions in section 2.2.2.
  3. A user that cannot remember its password should click "Reset Password" and follow the instructions in section 4.2.3 of this manual.

2.2 Registering a New User Account

A person from an already registered buyer/supplier/service provider, that wishes to create a new user for the MIS, should first click the "Create User" link on the login page. The registration process then entails three steps:

  1. Submission of user information
  2. Validation of account request
  3. Approval/rejection by SPX Officer

2.2.1 Submission of User Information

When clicking the "Create User" link, a "Create user form" appears. The user needs to fill out the requested information as described in Box 1. It then clicks the "Register" button. An automated e-mail is sent to the user's e-mail account and the following message will appear:

MESSAGE

Account Created
Your account has been created successfully. Please check your email to confirm your account

Go to confirmation page

Box 1 – Filling out the "Create User Form"	
1. These fields should be very straight-forward to fill out. It is important that the e-mail address provided is the same in both fields. 2. Here the user selects an own user name. It can contain any letter a-z, A-Z and numbers 0-9. 3. The user selects a preferred password. The password must contain at least 8 characters, and at least one of the characters must be a number. The password should not be written down in any place where others may find it. 4. Here the user selects the country where the company is located. 5. The user selects its company that should already be registered in the database. By typing the first letters of the company name, a list of possible companies will automatically appear. 6. The user must carefully read through the terms and conditions, and accept them by checking the box. The user then clicks the "Register" button.	**CREATE USER** **First Name:** **Last Name:** **Email :** **Email Confirm:** 1 **User Name:** 2 **Password:** **Password Confirm:** 3 **Country:** 4 Select Country **Company:** 5 **Telephone Number:** Country Code Area Code Number **Cellphone Number:** 1 Country Code Area Code Number **Terms and Conditions to use SPX** When you open an account on the SPX system .... **Accept Terms and Conditions** ☐ 6 Register Login Page

2.2.2 Validation of Account Request

The new user now needs to confirm its account request by opening the e-mail sent to him/her by the system. The e-mail will have the sender "SPX-SUPPORT" and reads as seen in Figure 2:
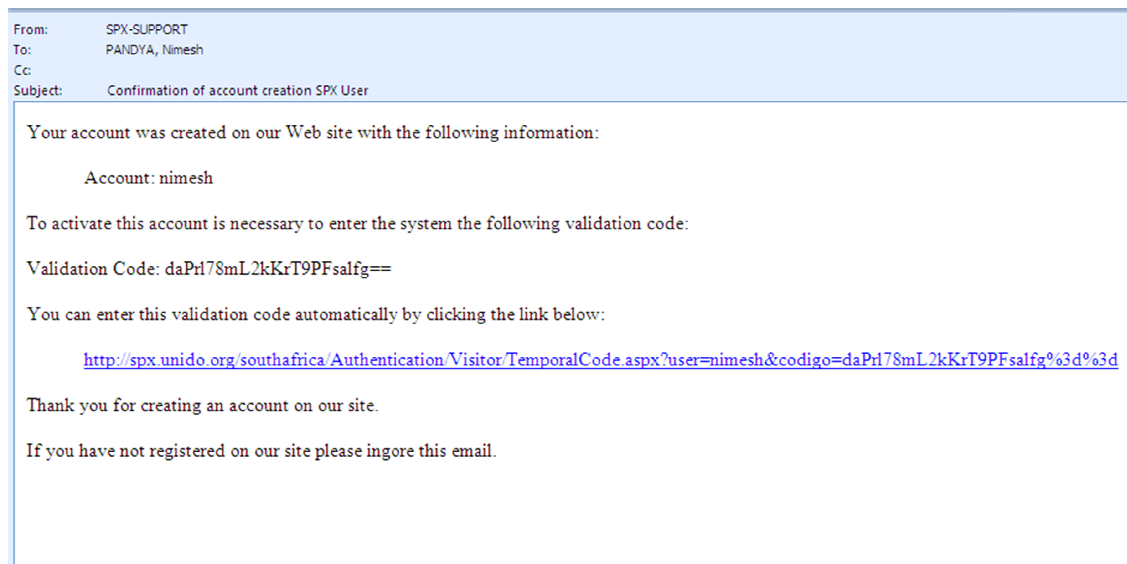
Figure 2 - Validation e-mail

To validate the account request, the user must go to the "Validation page" reached from the login page (see section 2.1) and enter the requested user name in the upper text field and the "Validation Code" (provided in the e-mail) in the lower one. By clicking the link in the e-mail, this will be done automatically. In both cases, the user must then click the "Send" button to finalize this step. The screen depicted in Figure 3 will be shown:

Figure 3 - Confirm account

By clicking "Send", the user has confirmed the account request and an automated e-mail is sent to the SPX Officer. The user will be displayed the following message:

MESSAGE

Account Confirmation
Your account was confirmed in our system but has not been approved yet. An officer will verify the information provided and will register your account on the system shortly. Please check your email for details of this operation.

Go to Main Page
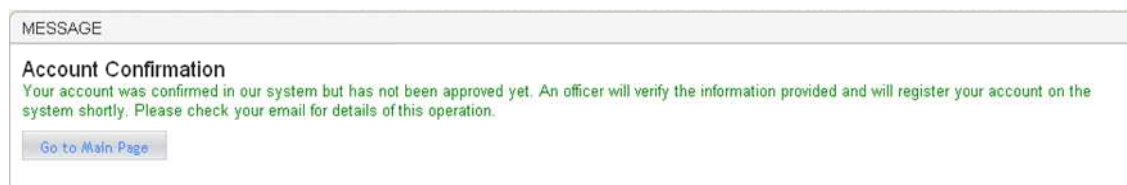
Figure 4 - Account confirmation message

2.2.3 Approval/Rejection by SPX Office Manager

In this last step of the registration process, the SPX Office Manager should review the information entered by the user and approve or decline the account request. The SPX Office Manager will see all user account requests in the "Activity Dashboard" (see chapter 5.2.1). It must first verify if the person belongs to the company and then go to the external platform and log in as **admin** in order to approve the request.

If approved, an e-mail is sent to the user confirming access to the system. The user can now login with its new account from the login page, also reached from the link embedded in the e-mail.

2.3 The Search Function

The SPX MIS provides a search component for various areas of the system. This search component is a powerful Google-like search engine that should normally find what the user is looking for. The user enters the search criteria in the "Search" text field, shown in Figure 5 below. The system will attempt to locate one or more records that match the search criteria and will perform the search on <u>all</u> meaningful text fields.

Search   [   ] 🔍 ⚲ ↪ Advanced Search 🌐

Figure 5 - The search field

2.3.1 Advanced Search

The advanced search tool allows the user to further specify a search. By clicking the "Advanced Search" option next to the search field, as shown in Figure 6 below, the system will redirect the user to a new page where it can specify the desired variables and values of the search.

Search   [   ] 🔍 ⚲ ↪ Advanced Search 🌐

Figure 6 - Advanced search function

For advanced searches in the company profile database, the advanced search option consists of two blocks of variables: "Basic Company Information", see Figure 7, and "Supplier Company Information", see Figure 8. In Figure 7, the search is set for companies with a number of employees greater than 100. In Figure 8, the search is set for companies registered in Austria. To add another country, the user simply selects the desired country from the drop-down menu and then clicks "Add Country". When all desired variables are filled out, the user clicks the "Advanced Search" button to initiate the search.

Figure 7 - Advanced search function options, part 1

Figure 8 - Advanced search function options, part 2

2.3.2 Search Using Operators

Instead of using the advanced search tool, the user may control the search by using operators. This option may be suited for experienced users, while the advanced search tool normally provides the user with the same functionalities but in a more user-friendly interface. See Annex I – Using Search Operators for more details on how to perform a search using operators.

2.4 How to Get Help If a Problem Occurs

Users that run into a problem while using the SPX MIS should search for help in the following order:

1. Seek guidance in this manual. The table of contents will facilitate the search of a possible solution to the problem.

   Tip: Use the search function of the PDF reader to look for keywords.

2. For buyers/suppliers/service providers: contact the SPX Office by e-mail, explaining the issue as thoroughly as possible.

3. For SPX Office Personnel: contact the UNIDO SPX Support, explaining the issue as thoroughly as possible, by sending an e-mail to:

   spxsupport@unido.org

The reader of this manual is also kindly asked to report any information missing in the manual, as well as flaws or bugs in the SPX MIS. The manual is a living document, and the system is under continuous development. Hence, all feedback provided will be given highest priority.

2.5 How to Submit Feedback

At the bottom left of all pages in the system, there is a "Submit Feedback" link. Users encountering bugs in the system are asked to submit feedback regarding the issue, so that this can be resolved by the development team at the UNIDO SPX Support/HQ.. In the feedback form opened when clicking the link, the user is asked to explain the issue in the description field – as thoroughly as possible. It is important that the information is specific for the development team to fully understand the problem that the user has encountered. Upon submission, the specific feedback is given an internal tracking number. At this stage the user can also attach a file to the feedback record. The file may for instance contain a snapshot of the screen or any other document that can be considered relevant for the feedback.

3 Home

Upon logging in to the SPX MIS, the user (SPX Office Personnel) first reaches the "Home" page, illustrated   in

Figure 9 below. From here, the user can easily access all the features of the system by navigating the black drop-down menu bar at the top of the page. As depicted in the figure, the "Home" page also consists of an SPX Officer "Dashboard", an event calendar, and a profiles statistics chart. On the top right of the page, the user may select the language preference – currently available only in English and French. Next to the drop-down menu, the user account name is shown, and to the very right, the user finds the link to log out from the system.

Figure 9 - SPX MIS "Home" page

SPX Officer Dashboard

The SPX Officer Dashboard provides shortcuts to some of the most useful resources of the MIS. Under "Activities" on the left, the user can see the number of open activities, and the number of activities that have already passed their due date. Under "Useful Resources" on the right side of "Activities", shortcuts to relevant functions are provided. Below, the most recently registered companies are listed. The user can select the time frame of the list (15, 30 or 90 days) and select the number of companies that he/she wishes to view (10, 20 or 30). The companies appear in alphabetical order. At the bottom of the dashboard, all RFQs submitted by the office are displayed.

Event Calendar

The event calendar on the right side displays the activities allocated to the office. In the drop-down menu (under "Show"), the user can choose to either see all activities of the SPX Office ("Deadlines SPX Office"), or to display the activities assigned only to its own user account ("My deadlines"). Yellow triangular icons represent an upcoming activity deadline, and red icons represent activities with a deadline that has already passed. The default month is the first one displayed; the double arrows on each side of the month's name allow the user to navigate in time from one month to another. By selecting any date in the calendar, the activities for that particular date will automatically be listed below, as shown in the figure to the right. By clicking the "View" link next to the activity, further information will be shown.

4 Administration

The Administration tag is made for SPX Office Personnel to facilitate the management of the SPX Office. It contains functions to manage users, areas, projects, activities and more.

4.1 SPX Office

In this menu, SPX Office Managers will only see "Office Statistics". For admin accounts, the additional three options are accessible: "Office Configuration", "Hierarchy Configuration" and "Parent Office".

4.1.1 Office Statistics

The Office Statistics page presents various statistics regarding the SPX Programme, e.g. number of registered companies by country, country office, ISIC sector etc.

4.2 Users

The SPX Office Personnel will find two options under **Administration > Users**, namely "User List" and "Change Password".

4.2.1 Users List

This page lists all the user accounts registered for the SPX Office in question. The information on the first page includes user name, full name, user e-mail address, status and area. By clicking the magnifying glass (🔍), detailed information about the user will be shown, and further management options are provided, as depicted with explanations in Figure 10.

OPERATIONS	
User Activities Late	Click to see the activities with an already passed due date, assigned to the specific user
User Activities	Click to see the activities assigned to the specific user
Lock User	This option is only accessible by admin roles of the SPX
Reset Password	Click to reset the password of the specific user
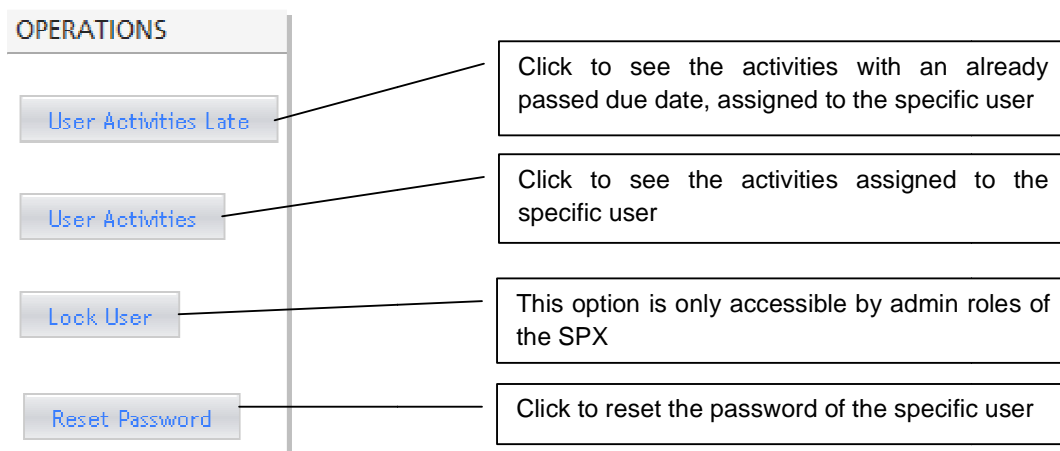
Figure 10 - User list operations

4.2.2 Change Password

This page is available on both the internal and external platform, and simply allows the user to change the password to its user account. The user is asked to type in the old password and must then select a new one, repeat it in the "Confirm New Password" text field, and then click the "Change Password" button. <u>The password must contain at least 8 characters, and at least one of the characters must be a number.</u> The password should not be written down in any place where others may find it.

Figure 11 - Changing password

4.2.3 Changing Password If Coming from the Login Page

SPX Office Personnel

Arriving from the internal platform's login page, by clicking "Recover Password", the following screen will be displayed:

By typing in the user account name and clicking "Submit", an e-mail containing instructions on how to change the password is sent to the e-mail address registered for that account.

Buyer/Supplier/Service Provider

Arriving from the external platform's login page, by clicking "Reset Password", the following screen is displayed:

The user types in own e-mail address and then clicks the "Reset Password" button. An automated e-mail is sent to the user with instructions on how to change the password.

4.3 Areas

For management purposes, the SPX Office can create areas to allocate projects. This will facilitate the general internal SPX office management purposes and provide a better overview of the work undertaken by SPX Officers. The "Area Dashboard" displays the existing areas. By clicking the magnifying glass (🔍) next to an area, the SPX Office Manager can edit or delete the area, and will also find shortcuts to view users and activities assigned to that area.

4.4 Projects

Projects, defined as being a particular task related to SPX activities …are also available for management purposes. Activities may be assigned to a certain project, facilitating the activity

management for the SPX Office Personnel. The "Project Dashboard" displays the projects of the SPX Office, and provides information such as status, start date, creator and manager of the project. By clicking the magnifying glass (🔍), the user can edit or delete the project, as well as adding annotations. If the magnifying glass is in the forefront of a red triangle (🔍), it means that the deadline of the project has already passed.

To add a new project, the user simply clicks the "Add New Project Record" on the Project Dashboard, fills out the information, and finalize by clicking the "Insert" button.

4.5 Office Data

For internal MIS platform users, three options are found under the "Office Data" tag, namely: "Manage Regions", "Manage Support Documentation" and "Manage Certifications Suggestion".

4.5.1 Manage Regions

By dividing the country into regions, the SPX Office can get a better overview of the location of registered companies. The SPX Office may choose the regions according to own preference, (i.e geographically divided provinces, regions or states, or industrial zones).

When accessing the "Manage Regions" page, a list will display the existing regions for that particular SPX Office. By clicking the magnifying glass (🔍) next to the regions, the information will be shown again below the entire list. An "Edit" and a "Delete" button will also appear. The editing option allows the user to change the name and also the country of the region. To delete the region, the user simply clicks the "Delete" button and then confirms.

By clicking the "New Region" option, a text field and a drop-down menu will appear below the list. The user types in the name of the region in the text field, selects the country in the drop-down menu, and then clicks the "Insert" button to add the region. The region will automatically be given an ID.

Figure 12 - Managing regions

4.5.2 Manage Support Documentation

In the RFQ process (as described in chapter 5.3), support documentations such as non disclosure agreements, business plans, contracts etc. can be added. On the "Manage Support Documentation" page the SPX Office Manager can decide which types of support documentation should be available to attach to an RFQ. To add a category, the user chooses "New Support Documentation", types in the name of the category and then clicks the "Insert" button. To delete or edit an already existing documentation type, the user simply clicks the magnifying glass (🔍) next to the Support Documentation ID – thereafter, the delete and edit options will appear below the list.

4.5.3 Manage Certifications Suggestion

When a company profile is being filled out or updated (see chapter 5.1.3), information regarding certifications that the company possesses may be added. On the "Manage Certifications Suggestion" page, SPX Office Manager can decide what type of certification categories should be possible to select in the company profile form. For example, this could be ISO 18000, ISO 9000 etc.

4.6 Activity Settings

The activity settings can only be seen on the internal platform.

4.6.1 Activity Categories

Activities (see Chapter 5.2) can be organized by categories for easier management and overview by the SPX Office. For instance, activity categories can include "SPX Promotion Activities", "SPX Profiling Follow-Up Activities" etc. The user can add new categories by clicking the "Insert New Category" link. A window will then pop up, as shown in Figure 13. To add a new activity category, the user must type in the name of the category and then click the "Insert New Category" button.

Figure 13 - Inserting a new activity category

To change the name of an already existing activity category, the user can simply click the "Edit" button next to the activity in the list, change the name in the text field and then click "Update". To delete an activity category, the user instead chooses the "Delete" button.

Figure 14 - Activity category description

4.6.2 Activity Assignment Lists

The system will automatically create activities for specific events, such as the submission of an RFQ by a buyer or when a company profile is scheduled to be updated. Specifically, an activity is created whenever:

1. A new company profile is created
2. An existing company profile is updated
3. An RFQ (Request for Quotation) has been created

When the activities are created they will be assigned to a user within the SPX Office. On the "Activity Assignment Lists" page, the SPX Office Manager can define, for each category, which users should be assigned these activities. For instance, as depicted in Figure 15, by selecting "Company Profile Update" in the first drop-down menu and the preferred user in the second drop-down menu, and then by clicking "Add User To List", that particular user will be added to the list of users who can be assigned activities regarding company profile updates. When a new "Company Profile Update" activity is created, the system will assign it to the user on the list that has the least number of open activities.

Figure 15 - Choosing users for assignment of activities

To avoid allocation of activities to a certain user, the SPX Office Manager can click the icon with a red cross (✗) on the left side of the particular user to delete it from the list.

4.7 Special Tools

The special tools can only be seen on the internal platform.

4.7.1 View Time Measurements

This feature displays the performance of the system. As depicted in Figure 16, a list of various functions displays the maximum time ("Max Time") and minimum time ("Min Time") of which the functions have been performed. The number of times a function has been carried out since last reset is displayed under "Measurement Count", the average time of performance is calculated and displayed in the "Average Time" column, and lastly the standard deviation of the sample is displayed. By selecting the magnifying glass (🔍) next to a function, detailed measurement statistics will appear on the bottom of the page. To reset the measurements to zero, the user may click the "Clear Measurements" link.

Figure 16 - System performance measurements

5 SPX Profiling

5.1 Profiles

Company profiles constitute the basis of the SPX MIS. The SPX Officers add new company profiles to the database through this page, and can update the information after regular company visits, or when companies themselves request to update their respective information (see Chapter 7.3.1). This sub-chapter will first explain how to use the Profiles Dashboard and how to export a list of company profiles. Secondly, it will guide the SPX Office Personnel on how to add a new company profile.

5.1.1 Profiles Dashboard

The Profiles Dashboard consists of a dynamic list of the company profiles entered into the system by the specific SPX Office. The user may choose to view all or selected type of companies – be they buyers, suppliers and/or service providers, - by checking the corresponding box.

The user may search for specific companies by using the search function, see Chapter 2.3 for detailed instructions.

The company list displays various variables from the company profile form, column by column. To change which variables should be shown in the list, the user simply clicks the ⏏ icon on the left side of the list (Figure 17), selects the preferred columns in the pop-up window and then clicks the "Save Columns" button. .

Figure 17 - Change column attributes

CThe companies can be sorted in any order preferred by the user, by using the "drag-and-drop" function. To use the drag-and-drop function, the user simply clicks the column header of choice, holds it down and drags it to the indicated row (shown in Figure 18) before dropping it. The list will automatically be updated and sorted accordingly. The user may decide upon a whole sorting hierarchy by adding more column headers to the row using the same drag-and-drop function. In the example of Figure 19 below, the companies have been sorted by type, year of establishment and lastly company name in alphabetical order.
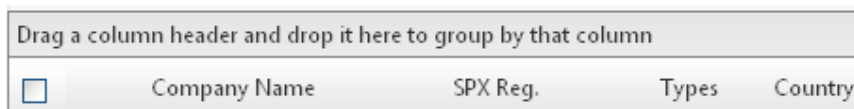
Figure 18 - Drag-and-drop function to sort companies
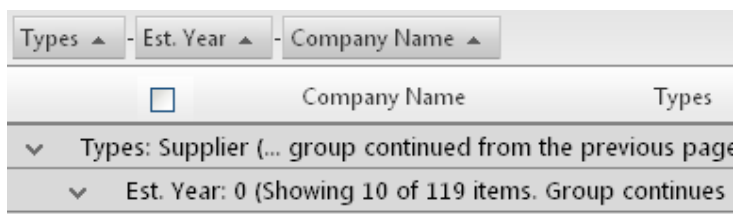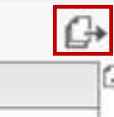
Figure 19 - Example of sorting a company list

5.1.2 Exporting a List of Companies

An important function of the Profiles Dashboard is the option to export company profile lists. The export feature provides the user with an Microsoft Excel file (.xls) containing company information extracted from the SPX database. To export the companies in the company list, the user clicks the icon at the upper right corner of the list.

Users can choose the format of the data presented in the Excel file: either formatted or one row per record. It also selects what information to include by ticking the boxes 1 – 5 (or the "Select All" box to include all extractable information), as shown in

Figure 20. The user then clicks the "Export" button in order to export the list.

Figure 20 - Exporting a company list

Extracting the data from the database may take up to a couple of minutes, depending on the speed of the users' internet connection. When the system has finished this process, a window will appear asking the user what to do with the file. If using the Windows XP Operating System, the dialog window will look like as the one depicted in Figure 21. For other operating systems, the layout may differ, but the options essentially remain the same. Here, users can choose to open the file directly, or to save it on the computer or other directory.
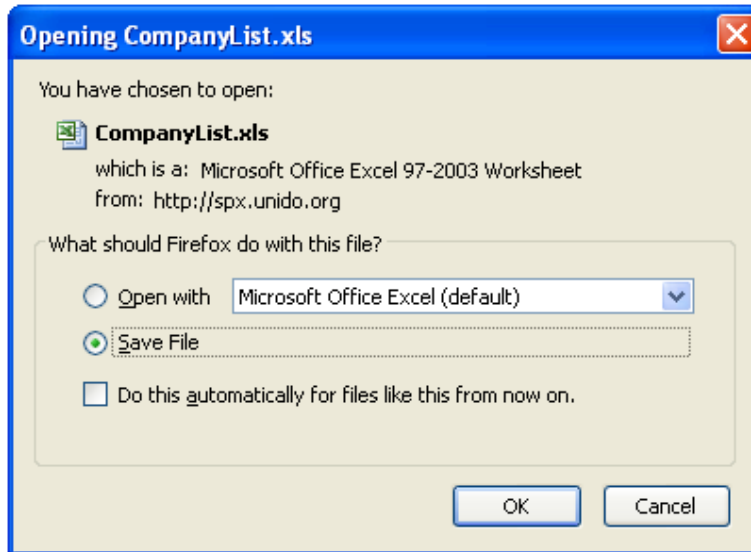
Figure 21 - Options for exporting a company list

If you select "**One row per record**" format of Export, save the CompanyProfiles.csv file on your hard drive and then follow the below steps:

1) Select the first column which has all the data.
2) Go to the Data Tab and click on Text to Columns.
3) Choose type Delimited and click next.
4) In this screen, uncheck the Tab delimiter which is there by default, and click on "Other", in the Text box next to "Other" enter this symbol "| (pipe)".
5) Click Next and Finish.

5.1.3 New Company Profile

Adding a new company profile to the SPX database is a fairly straight-forward task once the company information has been gathered. The SPX Office Personnel (SPX Office Manager, SPX Officer, SPX Office Engineer etc.) begin the process by clicking the "Create Company" link on the top left of the company list in the Profile Dashboard, or by navigating directly on the menu **SPX > Profiles > Create New Profile**.

Step 1 – Registering new company profile

On the first page, the system asks for basic company information. All fields except "legal status", "region" and "web site" are required to be filled out. However, if this optional information is available, it is advisable to enter this as well. Note that the "Region" drop-down list only contains values if added by the SPX Office (Refer to Section 4.5.1 for Management of Regions).

The first profile form variable refers to "Company Type". Here multiple options can be selected, if relevant to the respective company case. The type of company is defined in the SPX Programme framework as follows:

- **Supplier**: A company acting as a subcontractor to other companies (be they large or small, domestic or foreign, private or state-owned) by supplying intermediate products or services
- **Buyer**: A company acting as a contractor to domestic companies and generating RFQs (Requests for Quotation).
- **Service provider**: Private and/or public entities (agencies, companies, organisations) operating in the local business community providing industrial and operational services to

SMEs in a wide range of areas of expertise, for example, quality assurance, environmental management, human resources, marketing, business development etc.

After the filling-out of the profile form, as done with the fictitious Company "ABC Manufacturing" depicted in Figure 22 below, the SPX Office user clicks the "Create Company" button. The company is now registered in the SPX Database and will be issues with a unique SPX Registration Number.

Figure 22 - New company record

Step 2 – Company Details

After registering the company, the SPX Office user will be redirected to the "Company Details" site for the specific company. A tab bar with the following six options will be shown:

- Company Details
- Specific Company Details
- Company Qualification

- Company Product and Process Details
- Additional Information
- Documents Attached

On the "Company Details" tab, the information provided in Step 1 can be edited by clicking the "Edit" button. Information on company phone number, e-mail, social network, business language, factory address and additional company contacts can also be added. In the example of Figure 23, the business languages of ABC Manufacturing have been set to Arabic and French, and the URL to the company's LinkedIn profile has been provided.

Figure 23 - Company profile, adding company details

At the bottom of the page, factory address and additional company contacts may be added.

Step 3 – Specific Company Details

Under the "Specific Company Details" tab, information regarding human resources (see Figure 24), financial and export information (see Figure 25, Figure 26, and Figure 27) can be added.

HUMAN RESOURCES

Add human resources information

Total Number of Employees

Number of Managers

Number of Engineers

Number of Technicians

Number of Clericals

Number of Workers

Number of Other Personnel

Share of part-time, seasonal and subcontracted

Number of shifts
N/A

Insert   Cancel

Figure 24 - Information to provide regarding the company's human resources

FINANCIAL AND EXPORT INFORMATION

Add financial information

Registered Capital
United States doll:

Invested Capital
Euro (EUR)

Does this company have more than 10% foreign equity ownership?
⦿Don't know ◯Yes ◯No

Export Ratio (%)

Insert   Cancel

Figure 25 - Information to provide regarding the company's financial situation

Financial Information Type
Investment

Year Required

Amount Required

Currency Required
Select Currency for Amount

Insert   Cancel

Figure 26 - Adding financial information regarding investment, turnover and export turnover
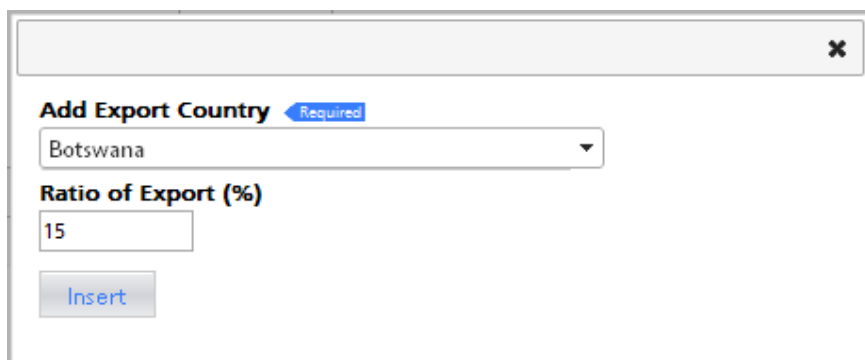
Figure 27 - Adding export countries

<u>Step 4 – Company Qualification</u>

Under the "Company Qualification" tab, information regarding the company's affiliation to other associations (see "Membership Status" in Figure 28) and reference companies (see Figure 29) can be added. Under "Qualifications", the following information can be added: approvals, labels, certifications, software, licenses and patents. This information can be added by using the quick insertion control, see Box 2.
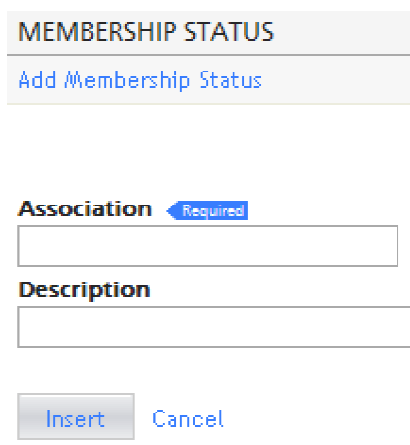
Figure 28 - Adding the company's association memberships

Figure 29 - Adding company reference details

Box 2 – Quick Insertion Control

The quick insertion control allows the user to quickly and easily insert single description records one after the other, solely by writing the description of the record and pressing the ENTER or the TAB key.

For example, to insert the name of the certificates 'ISO 9001' and 'ISO 22000', the user simply types each one of them and presses either the ENTER or the TAB key. This action should give the following result:

By clicking the cross (✖) on the right side, the record will be removed. It is not possible to update or change a record that has already been entered.

In some cases the interface will suggest possible record values. In these cases the user can choose any of these values and avoid having to type it.

Step 5 – Company Product and Process Details

In this step, the SPX Office Personnel can specify the company's industry sector, products, processes and equipment. To insert the information and add new entries, the user needs to expand the options by clicking the "Add Activity Sector/Product/Process/Machine or Equipment" links. The activity sector in which the company operates should be classified according to the ISIC classification, see Figure 30. For information about the ISIC, see Annex II – ISIC of this manual.

COMPANY SECTORS (ISIC)

Add Activity Sector

No sectors are defined for this company.

ISIC [What is this?]

Type ISIC Code or description...

Details

Quantity

Unit

Select Unit

Insert   Cancel

Figure 30 - Selecting the company's industry sector

The products of the company should be specified according to the United Nations Standard Products and Services Code® (UNSPSC) system, as referred to in Figure 31. Information about this global classification system can be found at UNSPSC's web site: http://www.unspsc.org/

PRODUCTS OF THE COMPANY (UNSPSC)

Add Product

No p

UNSPSC Code [Required] [What is this?]

Type UNSPSC Code or description...

Details

Quantity

Unit [Required]

Select Unit

Insert   Cancel

Figure 31 - Entering the products of the company

PROCESSES OF THE COMPANY (UNSPSC)

Add Process

No p

UNSPSC Code Required [What is this?]

Type UNSPSC Code or description...   ▾

Details

Quantity

Unit Required

Select Unit   ▾

Insert   Cancel

Figure 32 - Entering the processes of the company

Under "Production Machines and Test and Control Equipment", two types of machines can be registered: production machines and test and control machines. To select the correct type, the user uses the drop-down menu under "Machine Type". Name, description and quantity must be entered.

PRODUCTION MACHINES AND TEST AND CONTROL EQUIPMENT

Add Machine or Equipment

Production Machines

There are no registered production machines.

Test and Control Equipment

There are no registered test or control equipments.

Machine Type

Production Machine   ▾

Name Required

Description Required

Quantity Required

Insert   Cancel

Figure 33 - Adding the company's machines and equipment

Step 6 – Additional Information

Under this tag, additional information can be added the company profile. To insert the information and add new entries, the user must expand the options by clicking the "Add Partnership Information/Assistance Requested/Observations and Comments/Reference/Visit Record/Annotation" links. Under "Supplier Partnership Details" is it first asked if the company has a JV – a joint venture – with another company, as seen in Figure 34. Under "Assistance Requested Details" (Figure 35), the SPX Office User should check the boxes adjacent the topics/areas which the company requires in terms of assistance.

Figure 34 - Adding supplier partnership details

Figure 35 - Selecting what type of assistance has been requested by the company

Under "Observations and Comments" (see Figure 36), the SPX Office User should enter own observations resulting from the physical company visit he/she may have directly or indirectly undertaken on important operational aspects such as those regarding sustainability and other aspects of the company's operations and management. The statements are answered by choosing a value from the 1-5 scale where 1 refers to "strongly disagrees" and 5 refers to "strongly agrees". Under "Reference to UNIDO Programme Participation" (see Figure 37), the SPX Office Personnel should mark all UNIDO programmes that the company has participated in.

OBSERVATIONS AND COMMENTS

Add Observations and Comments

Sustainability: (1:strongly disagree | 2:Disagree | 3:neigther agree nor disagree | 4:Agree | 5: Strongly agree)

No.	Functions / Process	1	2	3	4	5
1	The senior management of the company is committed to sustainability of its products, processes and suppliers.	○	○	○	○	○
2	The company is substituting 'scarce' materials for more abundant ones.	○	○	○	○	○
3	The company is reducing its energy consumption and increasing the proportion of renewable energy used.	○	○	○	○	○
4	The company is reducing its carbon footprint	○	○	○	○	○
5	The company is recycling a high proportion of its waste.	○	○	○	○	○

Comments

Visiting Officer's Observation: (1:strongly disagree | 2:Disagree | 3:neigther agree nor disagree | 4:Agree | 5: Strongly agree)

No.	Function / Process	1	2	3	4	5
1	The company has the level of management skill and experience to be internationally competitive	○	○	○	○	○
2	Customers are satisfied with the company's products and service	○	○	○	○	○
3	Employees are actively involved in improving the business	○	○	○	○	○
4	The company achieves consistent quality	○	○	○	○	○
5	The company consistently keeps its delivery promises	○	○	○	○	○
6	The company's main suppliers are very reliable (quality & delivery)	○	○	○	○	○
7	The plant has a good standard of housekeeping	○	○	○	○	○
8	The site is laid out for lean (pull production) workflow	○	○	○	○	○
9	The company is active in creating / improving its a marketing presence (web, brochures etc)	○	○	○	○	○

Comments

Insert   Cancel

Figure 36 - Observations and comments regarding functions and processes

REFERENCE TO UNIDO PROGRAMME PARTICIPATION

Add Reference

Company Supplier has participated in:

☐ The UNIDO Investor Survey

☐ The SPX Benchmarking process

☐ COMFAR / Investment Project Preparation and Project Appraisal

☐ Other UNIDO Programmes

Insert   Cancel

Figure 37 - UNIDO Programmes in which the company has participated

Under "Company Visits", all company visits made to the company should be recorded. Annotations regarding the company can be added under "Annotation". The user can select the visibility of the annotation, if it wishes to share it with all users at the SPX Office, keep it only to itself, or share it with the SPX Officer.

COMPANY VISITS

Add Visit Record

There are no records of visits to this company.

Date Visited *Required*

Comments *Required*

Information Year *Required*

Insert   Cancel

Figure 38 - Adding a company visit record

ANNOTATION

Date:
8/16/2013
Visibility
⦿ Only I can see the annotation
○ Only I can and the SPX Officer can see the annotation
○ Everybody can see this annotation
Title: *Required*

Note:

Figure 39 - Adding an annotation about the company

Step 7 – Documents Attached

Under "Documents Attached", the SPX Office Personnel can add documents to the company profile. Documents can either be attached from the document library (see chapter 5.4) by using the search function, or by creating a new one, as seen in Figure 41. The steps to create a new document are explained in chapter 5.4.1. These documents could be company brochures, general power-point presentations or other material that explains the activities of the respective company.

Figure 40 - Attaching a document to a company profile

Figure 41 - Creating a new document for a company profile

5.2 Activities

Activities in the MIS are created for the personnel at the SPX Office in order to facilitate the management of the SPX Office. Every time a company profile is created, an existing company profile is being updated, or an RFQ has been created, an activity is created and assigned to different users within the SPX Office (see Chapter 4.6.2 for assignments of activities). Under the menu option **SPX > Activities**, all options (except "Create New Activity" and "Checklist Dashboard") will lead the user to the Activity Dashboard, displaying some, or all, of the office's activities.

5.2.1 Activity Dashboard

The Activity Dashboard displays the activities assigned to the SPX Office. The columns display the activity's ID, summary, to which user it is assigned, its status and to which project it belongs (if any). To change the columns, the user can click the ⤷ icon on the right side and make its own selection of which information should be displayed.

The magnifying glass (🔍) will redirect the user to "Activity Details" for more information regarding the activity. There, the user can also edit, finish or delete the activity. If the magnifying glass is in the foreground of a red triangle (🔍), it means that the activity has already passed its due date.

To mark an activity as finished, the user should click the green check mark (✔) on the row of the activity, and confirm by clicking "OK".

By selecting the checkbox "Show Hidden Activities", all activities that have been set to "hidden" will be shown on the list. See Step 4 in chapter 5.2.2 for more information about hidden activities.

Figure 42 - The activity dashboard

5.2.2 Create New Activity

A new activity is created either by choosing the option directly in the menu bar, or by clicking the "Create New Activity" link on the Activity Dashboard. The following steps must then be performed.

1. The user enters information about the activity. While the summary (required) may describe the activity in brief, a more thorough description can be provided in the "Description" field.

2. The activity must have at least one assigned user. Users can be found in the drop-down menu, and are added by clicking "Add to list". Various users can be assigned to the same activity. To delete a user from the list, use the 🗑 icon.

3. The deadline sets the date of when the activity should be finished.

4. An activity can be hidden, or "put to sleep", until a certain date. When an activity is asleep it is not shown in the activity list, if not the "Show Hidden Activities" check box has been explicitly selected in the Activity Dashboard. If the activity has a deadline, the "Hide Activity Until" date should be set ahead of this in time.

5. The activity's priority can be set to low, medium or high.

6. The activity can be assigned to a certain project (as set in Chapter 4.4) or category (as set in Chapter 4.6.1).

7. A company associated with the activity may be selected, for instance if the activity is to update a certain company profile.

8. After completing steps 1-7, the user must click the "Insert" button to create the activity.

Figure 43 - Creating a new activity

5.2.3 My Open Activities

This option will display the activity dashboard with all activities – assigned to the user – which status is set to "Open".

Using search operators, this expression would result: "@AssignedToID [user ID] and @Status Open"

5.2.4 My Past Due Activities

This option will display the activity dashboard with all activities – assigned to the user – that are not finished and which deadlines have already passed.

Using search operators, this expression would result: "@AssignedToID [user ID] and @Status Open and @Deadline < TD()"

5.2.5 Activities – Created Today

This option will display the activity dashboard with all activities created by the user that specific day. However, the activities may have been assigned to any user at the office.

Using search operators, this expression would result: "**@DateCreated TD() and @CreatorID [user ID]**"

5.2.6 Activities – Created that are Open

This option will display the activity dashboard with all activities – created by the user – which status is set to "Open". However, the activities may have been assigned to any user at the office.

Using search operators, this expression would result:: "**@CreatorID [user ID] and @Status Open**"

5.2.7 Activities – Created that are Late

This option will display the activity dashboard with all activities – created by the user – which status is set to "Open" and which deadlines have already passed, but are not yet finished. The activities may have been assigned to any user.

Using search operators, this expression would result: "**@Status Open and @Deadline < TD() and @CreatorID [user ID]**"

5.2.8 Checklist Dashboard

A checklist is used for management purposes, for instance if the SPX Office Personnel wish to make a list of necessary action or activities for a certain project. The checklist dashboard shows all checklists created for the SPX Office, displayed with title, owner and number of items it contains. To view, edit or delete a particular checklist, the user simply clicks the 🖉 icon next to it. The user will then have the option to change the name and description of the checklist, and add ("Add Checkitem") or delete (❌) checklist items. The user can choose to make the checklist only visible to its own user account, or visible to all users at the SPX Office, by checking the "IsPublic box" (☑ IsPublic). Any changes made to the checklist should be confirmed by clicking the "Update" button.

5.3 RFQ

RFQ – Request for Quotation – is one of the main features of the SPX MIS. The RFQ process is illustrated in Box 3 in this manual, as well as on the SPX web page under "The RFQ Process". The RFQs are created by buyers, reviewed by the SPX Office, and then submitted to the attention of suppliers. The creation of an RFQ is possible for all type of users and the procedure is the same. Create New RFQ

To create a new RFQ, the user on the SPX MIS can either select "Create New RFQ" directly from the menu bar upon selecting **SPX > RFQ**, or else click "Create RFQ", if already on the RFQ Dashboard (see Chapter 6). On the external platform, buyers and suppliers would need to click the "Create New RFQ" on the RFQ Dashboard, or by choosing **RFQ > Create RFQ** in the menu bar.

The first six information requests require mandatory information (see Figure 44). First, a summary (title) of the RFQ should be stated, to give suppliers an easy and quick understanding of the thematic of the RFQ. "Contact Name", "E-mail" and "Submission Address" should be filled out accordingly, and further instructions can be provided to the submission address in case this is required. The preferred currency of the eventual transaction should then be selected, as well as relevant International Commercial Term – also known as Incoterms®. For the latest information about Incoterms®, the user may visit the web site of the International Chambers of Commerce (ICC), at:

http://www.iccwbo.org/products-and-services/trade-facilitation/incoterms-2010/

Figure 44 - Creating a new RFQ

Next follow two optional text fields where the buyer may state any special conditions or process details with regards to the RFQ. Lastly, the buyer sets a deadline by which time the RFQ should be responded to and also selects own company from the company drop-down menu (see Figure 45). When all this information is provided, the buyer submits the RFQ by clicking the "Insert" button. The RFQ will now appear on the SPX Office RFQ Dashboard (see Chapter 6). The SPX Office user then reviews the RFQ and submits to the attention of supplier(s)serviced through SPX Programme.

Figure 45 - Submitting the RFQ

5.3.1 RFQ Dashboard

In the RFQ Dashboard, the RFQs for the SPX Office are listed. As per default function,RFQs are sorted by their ID, in ascending order. To sort by any other column (attribute), the user simply drags the column name to the top row where it says: "Drag a column header and drop it here to group by that column". To choose what information should be displayed in the list, the user can click the ⬀ icon next to the upper right corner of the RFQ list. A window will appear, as depicted in Figure 46, where the user can select preferred attributes, and must then click "Save Columns" to update the list accordingly.

SELECT COLUMNS

☐ Rfq ID
☑ Summary
☐ Contact Name
☐ Currency
☐ Incoterm
☑ Deadline
☐ Status
☑ Spx Office
☐ Assigned User
☑ Creation Date
☑ Company
☐ Days Late

Save Columns   Cancel

Figure 46 - Selecting columns to be displayed

By clicking the magnifying glass (🔍) next to an RFQ, the user will be directed to a page showing all available information about the respective RFQ. The page consists of eight boxes, further described below.

RFQ Details

In the main box on the left hand side, the RFQ details are shown, as filled out in the "Create New RFQ" form. These details can be edited by selecting the "Edit" button at the bottom of the box.

The SPX Office user can choose to send the RFQ to companies on a shortlist by choosing "Send RFQ", cancel the RFQ by choosing the "Cancel RFQ" option, or to add an annotation to the RFQ by clicking the "Add Annotation" option, as highlighted in Figure 47.

RFQ DETAILS

Return to Dashboard   Send RFQ   Cancel RFQ   Add Annotation

Figure 47 - RFQ options

By clicking "Add Annotation", a new window will appear, as shown in Figure 48. Except for entering a title (required) and the note itself, the user have two decisions to make. First, the user must set the visibility of the annotation. The user can make the annotation visible either for own useor make it visible to everyone. As default, the visibility is set to the user only.

Figure 48 - Adding a note to an RFQ

Next, the user has the option to make the note "local" or not. By indicating that the note is local, the note is not replicated to other SPX offices. If the note is associated with an RFQ and the user wishes that the note moves associated to the RFQ through the network of SPX Offices in descendent way, then the box **Is local note** should *not* be checked. The same should be done if the note is associated with a Profile and the user wishes the note to move associated to the Profile through the network of SPX Offices in ascendant way. If the user does not want to move the note associated to a Profile or RFQ then the box **Is local note** should be checked.

Offices and Suppliers

Under "Offices and Suppliers", a list of companies that have received the RFQ is displayed (the box will only appear for sent RFQs). The information shown refers to the name of the company, the name of the office, the date when the RFQ was sent, the status, and if the RFQ has been opened or not. The "status" indicates what action the company has selected to take: if it will send a quote, if it will not send a quote or if a decision is still to be taken ("Pending"). The last column indicates if the company has opened/not opened the RFQ (Yes)/ (No).

Phones

To add a telephone number to the contact person of the RFQ, the user simply enters the phone number together with area code and country code (if applicable) and then clicks "Add Phone", as shown in Figure 49. The user may enter various contact phone numbers including for fax, by repeating the same step again.

Figure 49 - Adding telephone details to an RFQ

Support Documentation
To add support documentations to the RFQ, the user can simply select the documentation from the drop-down menu and then click "Add Documentation". In the example of Figure 50, a non-disclosure agreement has been added. To delete it again, the user simply clicks the icon.

Figure 50 - Adding support documentation to an RFQ

Products
In the "Products" box, the user must specify what products are requested for in the RFQ. The SPX uses the United Nations Standard Products and Services Code® (UNSPSC) system. Information about this global classification system can be found at UNSPSC's web site: http://www.unspsc.org/
After selecting the requested product or service from the drop-down menu, the requested quantity, and the accurate unit must be specified. In the example shown in Figure 51, the RFQ requests a quotation on the deliverance of 100 tons copper ore per year. A more detailed description of the product may be added to the "Description" text box, and a sample quantity may also be requested by filling out the "Sample quantity" field. To finally add the product or service to the RFQ, the user must click the "Add product" button. To request more products in the same RFQ, the user simply repeats the procedure as applicable.

Figure 51 - Specifying the product(s) of an RFQ

Distribution List
The distribution list declares what countries the RFQ should be distributed to. As the note in Figure 52 suggests, all countries are selected by default if no specific country has been selected. To add a country to the list, the user simply selects it from the drop-down menu and clicks the "Add Country" button. There is no limit of how many countries can be added to the list. To delete a country, the user simply uses the ⌧ icon next to the country name.

Figure 52 - RFQ distribution list

Documents Attached
Any document attached to the RFQ will be listed in this field.

Annotations
At the bottom of the page, a box will display the annotations added to the RFQ. For instructions on how to add an annotation, refer to the beginning of this section under "RFQ Details".

Box 3 – The RFQ Process

As shown in the diagram below, the Request for Quotation (RFQ) process provides buyers with a straight forward facility that allows the presentation of RFQ requests to SPX Offices using on-line tools available on the SPX MIS which cascade the RFQs to SPX Offices and eventually to selected suppliers, in the process also tracking that suppliers have sent the corresponding quotes.
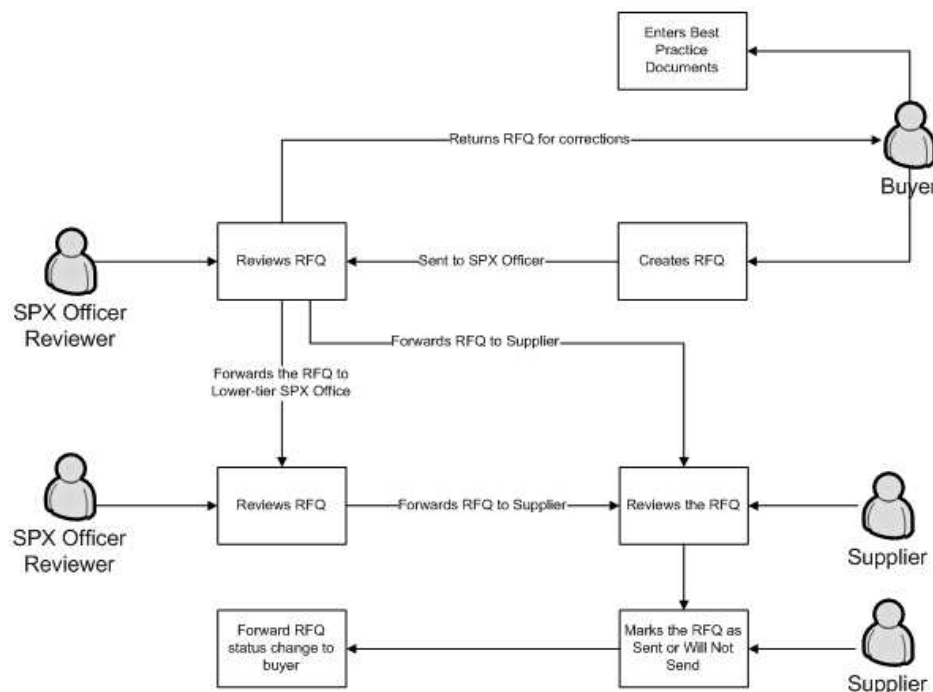
Using the SPX MIS RFQ facility, buyers are able to request a quote using a fixed RFQ template form that allows the buyer to specify the details of the request. The RFQ is then forwarded to an SPX Officer of the corresponding office (where it will be reviewed and sent to corresponding suppliers so that in turn, these can prepare the corresponding quotes. Local SPX office send the RFQs to locally profiled suppliers. These RFQs are either received from parent SPX or generated locally. RFQs are presented to suppliers using a Web-Based "SPX Supplier Homepage" where the supplier can track pending RFQs, past RFQs and can mark RFQs as completed (presented) or cancelled (will not present quote). The system tracks deadlines for submission of the quotes, e-mails reminders to suppliers when the deadlines are near and sends e-mail warnings to the SPX of potential supplier delays.

5.4 Library

The SPX MIS hosts a database of documents – an online "library". In this library, SPX Office Personnel, SPX HQ staff etc., can upload documents such as brochures, guidebooks and manuals such as this document.. The documents can then be sorted into different catalogues for easier access and overview.

5.4.1 Library Dashboard

The library dashboard lists all documents available in the library. The rows can be expanded by clicking the name of the document, as highlighted in Figure 53, to view key information regarding the corresponding document. Description of the document, keywords, language and version number are displayed, and the user can directly download the file(s) by clicking "[Download file, X Mbytes]" next to the file name. One "document" may contain various files.

Figure 53 - Document information in library dashboard

By clicking "More Details", the user will be redirected to the "Document Viewer" page containing full information regarding the document, as shown in Figure 54. Here, the user may:

1. Create a new document version
2. Edit existing information about the document
3. Download or delete existing files
4. Add new files to the document

Figure 54 - Document viewer

To add a new file to the document, the user clicks the "Select" button, chooses the file from the right directory and then clicks the "Upload" button. To upload various files at the same time, the user may select a file from the directory and then click the "Add" button before uploading them all at once, as done in Figure 55 below.

Figure 55 - Adding a file to a document

Creating a New Document

To create a new document, the user must click the "Create Document" link on the Library Dashboard. A window will appear, as shown in Figure 56, where the user fills out the requested information. Only the document "Title" is required, but the user is advised to enter as much information as possible. When the information is filled out and the user has selected and uploaded the relevant files, it should complete the process by clicking the "Create Document" button.

Figure 56 - Creating a new document

5.4.2 Catalogue Dashboard

The catalogue dashboard lists all document catalogues in the library. Documents can be added to a catalogue, and the SPX Office then decides which companies, or group of companies, that should have access to the catalogue.

To add a new catalogue, the user clicks the "Create New Catalogue" link on the Catalogue Dashboard. Name, description and type details need to be filled out. For "type", there are two options: "Standard Catalogue" (implying the catalogue will only be accessible for the user's own company) and "Shared Catalogue". If choosing "Shared Catalogue", three options will appear regarding the type of companies the user wishes to share the catalogue with: buyers, suppliers, and/or service providers. The user selects the boxes for the particular case and completes the procedure by clicking the "Insert" button.

Figure 57 - Catalogue details

If the SPX Office wishes to grant catalogue access only to selected companies, the SPX Office user must click "Add Permissions" on the catalogue details. By selecting the preferred company from the list of "Companies without permissions" and clicking the upper arrow (⬅), the company will move to the list of "Companies with permissions". Hence, the selected company will be able to browse that respective catalogue. To do away with an already given permission from a company, the user simply selects the company from the list of "Companies with permissions" and clicks the lower arrow (➡).

5.5 Shortlists

A shortlist is a list of companies registered in the system. A shortlist can, for instance, be used to display all relevant subcontractors which meet the criteria pre-set by a specific contractor, or for responses to an RFQ. The shortlist dashboard i is depicted in Figure 58.

Figure 58 - The shortlist dashboard

In the example of Figure 58, no shortlists are yet defined. To create a new shortlist, the user simply follows the steps in the subsequent chapter.

5.5.1 Create a Company Shortlist

1. The user starts by clicking "Add New Shortlist" in the Shortlist Dashboard. The user types in the preferred name of the shortlist in the "Description" text field and selects the amount of days it would like the shortlist to be saved for. Upon clicking the "Save" button, the shortlist is

created. In the example of Figure 59 below, the new shortlist is named "Shortlist 1" and the list is selected to be automatically deleted in 7 days from the creation date.

Description:

Shortlist 1

Days Until Shortlist is Automatically Deleted:

7

Save   Cancel

Figure 59 - Creating a company shortlist

2. The shortlist is now created and will appear in the shortlist dashboard, as shown in Figure 60.

		ID	Description	Date Created	Days To Live	Date To Delete
☐ 🔍	📋	15	Shortlist 1	Aug/13/2013	7	Aug/20/2013

Figure 60 - A new shortlist

3. To populate the shortlist with companies, the user must first click the magnifying glass icon (🔍). On the following screen, details about the shortlist are displayed; as can be seen in Figure 61, the list does not yet contain any companies.

EDIT AND VIEW SHORTLIST DETAILS

Return to Shortlist Dashboard   Add New Company to Shortlist

ID:
15
Description:
Shortlist 1
Date Created:
Aug/13/2013
Days Until Shortlist is Automatically Deleted:
7
Date Shortlist Will Be Deleted:
Aug/20/2013

Edit   Delete

Drag a column header and drop it here to group by that column					
ID	Company Name	City	Year of Establishment	Date Created	Type

There are no companies in this shortlist. Please add a company form the command bar or add multiple companies from the Company Dashboard

Figure 61 - Shortlist details

4. To add a company, the user clicks the "Add New Company to Shortlist" option. It then selects the preferred company from the drop-down menu and clicks "Add Selected Company". In the example in Figure 62, the company "UNIDO TEST Supplier" has been selected.

Company:

UNIDO TEST Supplier   ▼

Add Selected Company   Cancel

Figure 62 - Adding companies to a shortlist

5. Once a company is added, the user will be redirected back to the shortlist details page. As seen in Figure 63, the shortlist now contains the company UNIDO TEST Supplier. To add more companies to the list, the user simply repeats step 4, or follows the instruction in step 6.

	ID	Company Name	City	Year of Establishment	Date Created	Type
✗	1267	UNIDO TEST Supplier	vienna	2012	6/28/2013	Supplier

Figure 63 - Company shortlist example

6. Another way of adding companies to a shortlist is by going to the "Profiles Dashboard" (described in section 5.1.1), selecting any number of companies from the list, and then clicking "Add Selected" next to the Shortlist drop-down menu. This way, the user can easily perform a search for companies of particular interest and directly add them to a shortlist.

Figure 64 - Adding companies to a shortlist from the profiles dashboard

5.5.2 Consolidating Shortlists

The user may consolidate two (or more) shortlists. By doing this, a new shortlist will be created, containing all the companies listed in both (all) shortlists. For example, if the user wishes to consolidate "Shortlist 1" and "Shortlist 2", as shown in Figure 65, it selects both lists and then chooses "Consolidate". The user must now type in a name for the new list and then click "Save". If a company appears in both (or many) of the selected shortlists, it will only appear once in the consolidated shortlist.
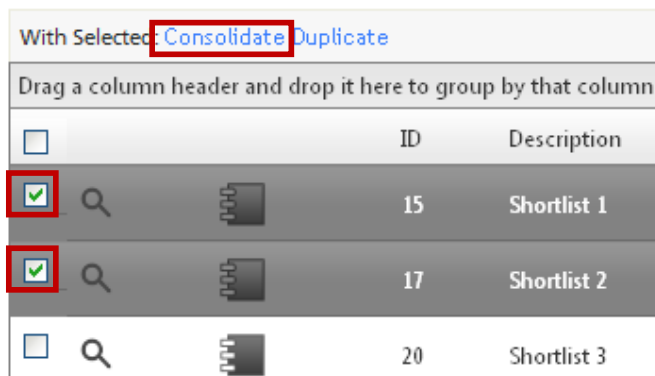
Figure 65 - Consolidating shortlists

5.5.3 Duplicating a Shortlist

The user may duplicate a shortlist by selecting the box on the row of the particular shortlist in the dashboard and then select "Duplicate", as shown in Figure 66 below.
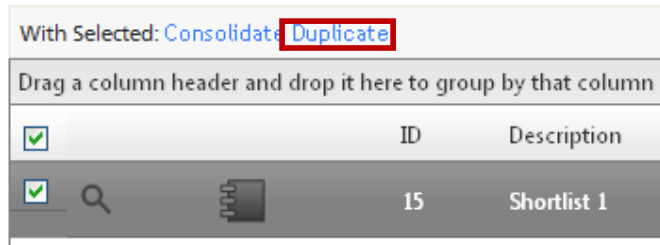
Figure 66 - Duplicating a shortlist

A copy of the selected shortlist will be created, with the name "Copy of + [Shortlist name]", as shown in Figure 67. The user can thereafter change the name and the contents of the shortlist by clicking the magnifying glass next to it. By clicking the 🗒 icon, the list of all companies contained in the shortlist will be shown.

Figure 67 - Result of duplicating a shortlist

5.6 About

Here, the user can find information regarding the MIS, such as credits and version updates.

5.6.1 Version Information

Changes are made continuously to the MIS, in order to improve its functionalities and the usability. On this page, the changes made to the system are described. As depicted in Figure 68, the list displays the date when changes are made, together with a description of the change, and a version number that the system got appointed after the change. For example, the version information is only available in English, and will appear in English even if French is selected as default language.

Date	Version	Description
Nov/01/2011	1.94.1	Print profile report added on External Site. Delete Calendar Event when activity was marked as Finished or Cancelled.
Nov/01/2011	1.94.0	Fixed feedback activities.

Figure 68 - Version information

6 Preferences

On this page, the user can customize various feature aspects of the SPX MIS. The values specified under "Preferences" only affect the user account currently logged in, and changing them will not affect other users in the system.

6.1 Personal Information

Here the user can add or change additional personal information such as: birth date, birth place, contact numbers, emergency contact information, and address. After typing in the changes, the user must click the "Save Settings" button in order to save the changes.

The full name and e-mail address cannot be changed by the user. The e-mail address is used to identify the user in the system, and cannot be changed without permission from the System Administrator. If the user would like to change its e-mail address, it must notify the SPX Head Quarters that will then perform the change request.

6.2 System Preferences

Five useful feature options are found under this tag. These refer to the following:

1. **Number of Searches to Save**
   This number sets the amount of search entries that can be stored for future searches.

2. **Send me e-mails when activities are created for me or when they are updated by someone else**
   By checking this box, the system will automatically send an e-mail to the user (to the address displayed under "Personal Information") when a new activity is allocated the user by another user in the system, or if an already existing activity is being updated by another user.

3. **Send me e-mails when activities are created or cancelled by someone else for the projects I manage**
   By checking this box, the user will receive an e-mail when another user creates or cancels an activity allocated to a project of which the former manages.

4. **Send me e-mails when activities I created for others are cancelled**
   By checking this box, the user will receive an e-mail when activities, allocated by the user to other users, are cancelled.

5. **Number of times detailed tooltips will be shown for each element before the tooltips are hidden**
   This number sets the amount of times detailed tooltips will be shown, when provided by the system.

6.3 Reset Behaviours

Under this tag, the user can reset the tooltip count set under "System Preferences" (see foregoing chapter).

7 Buyer View

The SPX MIS interface of the external platform for buyers, suppliers and service providers is "simpler" than that of the internal platform for SPX Office Personnel. Both platforms have the same look, but the functionalities differ, as illustrated in Table 1. The black menu bar for the buyers contains the following options: "Home", "My Account", "Company Profile", "Search Companies", "Buyer Dashboard" and "RFQ List". The options will be described in order of appearance, from left to right, in the subsequent chapters.

The "Buyer Dashboard" is the first page shown to the buyer upon login. As with the internal platform, the options to select language (English or French) and to log out are available on the top bar of the page.

7.1 Home

The "Home" page of the buyer view contains a menu of four options: "About SPX", "Benefits For Buyers", "Benefits For Suppliers" and "The RFQ Process". The information under each option is displayed in the box in the middle of the page. The information under "The RFQ Process" can be found in Box 3 of this manual.

7.2 My Account

Under "My Account", the buyer has the option to change its e-mail address (see Figure 69) and to change its password (see Figure 70). In both cases, the old e-mail/password must be entered – and also confirmed – by the new one. The password must contain at least 8 characters, and at least one of the characters must be a number. The password should not be written down in any place where others may find it.
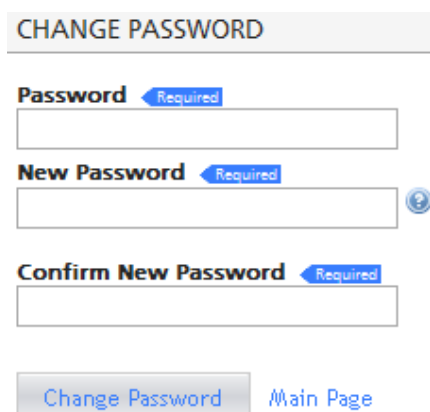
Figure 69 - Changing e-mail address (external platform)

CHANGE PASSWORD

Password Required

New Password Required

Confirm New Password Required

Change Password   Main Page

Figure 70 - Changing password (external platform)

7.3 Company Profile

Under "Company Profile", the buyer can choose from the options to request edits of its own company profile, to view company documents and to view documents shared among more than its own company.

7.3.1 Edit Profile

To edit the information regarding its own company, the buyer must submit a change request to the SPX Office. As illustrated in Figure 71, the buyer first selects the area for which it would like to request a change (in the example of Figure 71, "Certifications" has been selected). The user then types the change request in the text field under "Changes Requested" and submits it by clicking the "Submit Request Changes" button.

Figure 71 - Company profile change request

7.3.2 View Company Documents

Under this tag, the buyer will find the documents accessible by the company. By clicking the "More Details" option on a particular document, the user will be redirected to the "Document Viewer", with the same look and functionalities as on the internal platform described in chapter 5.4. The only option not present to the buyers is the option to add a document to a catalogue.

7.3.3 Shared Documents

The documents listed under "Shared Documents" are those documents that are set as shared to all buyer companies within the system. This option is set by the SPX Office Personnel by ticking the check box "Shared to buyers" in the "Catalogue Dashboard", explained in chapter 5.4.2.

7.4 Search Companies

Companies may search the database to review information about other companies. Under "Search Companies", the user finds a list similar to the Profiles Dashboard on the internal platform (see Chapter 5.1.1). The search function is used in the same way as that in the internal platform, see Chapter 2.3. By clicking the magnifying glass (🔍) next to a company, the user will find the profile details of that company. The following information is made available to buyers regarding other companies: "Company Details", "Company Contacts", "Scale Indicators Details", "Company Sectors (ISIC)", and "Products of the Company (UNSPSC)", as shown in Figure 72.

Figure 72 - Company profile information visible for buyers

7.5 Buyer Dashboard

The "Buyer Dashboard" is immediately displayed once the buyer logs in to the SPX MIS. As a result, the buyer can see all pending and open RFQs sent by the SPX Office to suppliers in the SPX network. To create a new RFQ, the buyer should click the "Create New RFQ" link and follow the instructions in chapter 0.

Pending RFQs are those that have been submitted by the company but not yet revised by the SPX Office for further submission to suppliers. Open RFQs are those that the company's corresponding SPX Office has submitted to one or more suppliers within the SPX system. The suppliers may respond to these by providing quotations directly to the buyer – using the company's contact information provided in the RFQ.

Figure 73 - The buyer dashboard

By clicking the magnifying glass (🔍) next to an RFQ, the buyer can review and edit the details already submitted regarding the particular RFQ. As shown in Figure 74, the user may also cancel the RFQ by clicking "Cancel RFQ", return the RFQ by clicking "Return RFQ", or add an annotation by clicking the "Add Annotation" link. If the RFQ is not yet submitted, the option "Submit RFQ" will be

shown instead of the "Return RFQ" option. If the RFQ is already sent, the option "Return RFQ" will not be available.
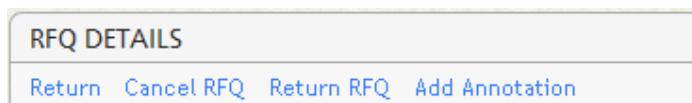
Figure 74 - Available options for created RFQs

7.6 RFQ List

The RFQ List on the external platform is the equivalent to the "RFQ Dashboard" on the internal platform. See Chapter 5.3.1 for a detailed explanation.

A few differences between the internal and external platform do however exist. When reviewing the "RFQ Details" - reached by clicking the magnifying glass (🔍) next to the RFQ - information such as "Assigned User", "Company" and "Days late" are not showed on the external platform. Furthermore, if an RFQ is already sent, the buyer is not able to delete it, whereas the SPX Office user is able to. If the buyer has submitted the RFQ, and it has not yet been revised and sent out by the SPX Office user, the option to "Send RFQ" will be available on the internal platform.

The detailed view of an RFQ will show an additional box called "Offices and Suppliers" if the RFQ has been sent. In this case, those companies that have received the RFQ are thereby listed, and the corresponding status indicates whether or not these may have decided to reply with a quotation, if they do not intend to send a quotation, or if they have not yet indicated what action to take ("Pending").

8 Supplier View

The interface of the external platform for **suppliers** is more or less the same as the one for buyers, as described in Chapter 7. The black menu bar for the suppliers contains the following options: "Home", "My Account", "Company Profile", "Search Companies", "Supplier Dashboard" and "RFQ List". The options will be described in order of appearance, from left to right, in the subsequent chapters.

The "Supplier Dashboard" is the first page shown to the supplier upon login. As on the internal platform, there is the option to select language (English or French) and to log out are available on the top bar of the page.

8.1 Home

The "Home" page for suppliers is identical to that of buyers. See Chapter 7.1 for a page description.

8.2 My Account

The "My Account" page for suppliers is identical to that of buyers. See Chapter 7.2 for a page description.

8.3 Company Profile

Under "Company Profile", the supplier can choose from the options to request edits of its own company profile or to view documents shared to supplier companies.

8.3.1 Edit Profile

The "Edit Profile" page for suppliers is identical to that of buyers. See Cchapter 7.3.1 for a page description.

8.3.2 Shared Documents

The documents listed under "Shared Documents" are those documents that are set as available to all supplier companies within the system. This option is set by the SPX Office Personnel by ticking the check box "Shared to suppliers" in the "Catalogue Dashboard", explained in Chapter 5.4.2.

8.4 Search Companies

Suppliers may use the search function in the same way as buyers, as explained in Chapter 7.4. However, when reviewing the profile details of a certain company, the suppliers cannot access the "Company Contacts" tag as the buyers can. In other words, less information about other companies are shown to the suppliers.

8.5 Supplier Dashboard

The "Supplier Dashboard" can be considered the most important part of the MIS for suppliers. Here, the supplier companies will find a list of pending RFQs that the SPX Offices deem interesting for them – as shown in Figure 75. In the list, brief information regarding the RFQs is displayed: an RFQ summary, contact information to the buyer company (contact name and e-mail address), currency, and applicable Incoterm. Furthermore, the deadline for replying with a quotation is displayed, as well as the status of the RFQ. Below the RFQ list, a box containing the areas registered for the certain supplier is shown.

Figure 75 - List of pending RFQs

If the supplier has received an RFQ but has yet to review it, the RFQ will appear as "Pending", and will thus be placed in the corresponding list on the Supplier Dashboard. The supplier should then click the magnifying glass ( ) next to the RFQ for revision.
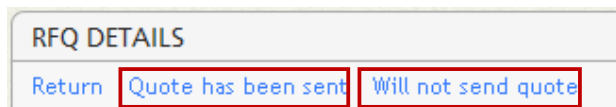
The supplier will reach a frame containing all the information provided by the buyer regarding the RFQ. On the left-hand side, details such as company contact information, process details, special conditions etc. are displayed. On the right-hand side (as depicted in Figure 76) the supplier will find four boxes containing telephone number(s) to the buyer, any added support documentation, the requested products, and a distribution list containing all countries to which the RFQ has been distributed. At the bottom of the page, the supplier will find any documents attached to the RFQ, and any annotation that is made visible for the company.

Figure 76 - RFQ information for suppliers

After having revised the RFQ, the supplier should decide if it will respond to the buyer with a quotation or not. Response to the buyer is not undertaken through the MIS. Instead, the supplier should use the

contact information of the buyer found on the RFQ Details page, always keeping the SPX Office informed of these contacts. After contacting the buyer and provided a quotation, or after having decided a quotation will not be sent, the supplier should click the corresponding alternative: **"Quote has been sent"** or **"Will not send quote"** in the "RFQ Details" box as seen in Figure 77.

Figure 77 - RFQ quote options

8.6 RFQ List

In the RFQ List, all RFQs are displayed, both those that remain pending as well as those that have been revised by the supplier. The status displays if the RFQ is still pending, if it has been cancelled, if a quote has been sent, if the supplier has decided not to send a quote, or if the supplier will not present. To only display RFQs with a certain status, the user may select the category in the "Status" drop-down menu.

Annex I – Using Search Operators

The SPX MIS allows the user to narrow down a search through the usage of operators. The user can thus control the search by creating a search expression specifying, in detail, the desired values for each available variable. The variables available for the search are displayed by clicking on the "Variable Selection Tool" ( ). By clicking any of the variables, the variable name will be copied to the search field, following a @-symbol: **@variableName.**

The variable could be of five different types, each one explained in detail in the following sub-chapters. After the variable name, the user specifies the desired value. For instance, to search for all companies located in Austria, the expression becomes: **@country Austria**

It is possible to use the logical expressions "**and**" and "**or**", as well as parenthesis. For instance, to search for persons whose first name is John and last name is Smith, the expression becomes:

@name john and @lname smith

To search for people whose first name is either John or Mary and whose last name is Smith, the expression becomes:

(@name john or @name mary) and @lname smith

Simple Text Search

A simple text search searches for ordinary text entries, either matching the whole word, or a part of it. Both the entries "Smith" and "mith" will find persons whose last name is Smith.

By adding quotation marks, two or more words can be grouped together. For instance, if the user wants to find a person named Mary Jane, and avoid entries only consisting of Mary or Jane, the expression becomes:
@name "Mary Jane"

Numeric Search

When making a numerical search, the "equal to" operator (=) is implied; to test for equality one simply enters the name of the variable followed by the value: "@id 100"

The operators listed in the table below can also be used in a numeric search:

Table 2 - Search function operators

Operator	Tests for	Example	Comment
>	greater than	@id > 5	
<	less than	@id < 10	
>=	greater than or equal to	@salary >=10000	
<=	less than or equal to	@salary <= 50000	
!=	not equal to	@operationCode != 5	
:	inclusive range	@operationCode 5:10	Searching all records with an operation code from 5 to 10 inclusive
in()	all values in a list	@opCode in(20, 45, 67)	Searching all Operation Codes that are 20, 45 or 67. It should be noted that there is no space between the keyword "in" and the left parenthesis.

Date Search

The date search is used just like the numeric search except that dates are represented in the international standard date notation: **YYYY-MM-DD**, where YYYY is the year in the usual Gregorian

calendar, MM is the month of the year between 01 (January) and 12 (December), and DD is the day of the month between 01 and 31. For example, the 24th of October 2013 is written in the standard notation as 2013-10-24.

The "equal to" operator is implied, so to test for equality one simply enters the name of the variable followed by the value: "@registrationDate 2001-6-1"

The operators listed in the table below can also be used in a date search:

Table 3 - Date search operators

Operator	Tests for	Example	Comment
>	greater than	@birthDate > 1966-1-1	
<	less than	@birthDate < 2012-5-3	
>=	greater than or equal to	@birthDate >= 1966-1-1	
<=	less than or equal to	@registrationDate != 2001-5-1	
!=	not equal to	@operationCode != 5	
:	inclusive range	@operationCode 5:10	Searching all records with an operation code from 5 to 10 inclusive
in()	all values in a list	@registrationDate 2011-1-1:2011-5-1	Searching for all records with a registration date from the first of January to the first of May of 2011 inclusive

Additionally, the functions **$year**, **$month** and **$day** can be applied to the date column. For example, to search for the people for which their birthday is on May, 5[th], type "$day(@birth) 5 and $month(@birth) 5". Naturally, the comparison operators can also be used with these functions.

Full-Text-Enabled Search

A full-text-enabled search is similar to the simple text search, but somewhat "smarter" about finding what the user is looking for. In this type of search, when typing "@objectType tool" the system will attempt to find all forms of "tool", including common inflections. Hence, the system will retrieve records for "tool", "tools", etc.

Boolean Search

These are the simplest type of variables, returning whether or not a statement is true (1) or false (0). For instance, to search for companies that have requested partnership in commercial distribution, enter:

@RequestPartnerDistribution 1

Annex II – ISIC

The International Standard Industrial Classification of All Economic Activities (ISIC) is the international reference classification of productive activities. Its main purpose is to provide a set of activity categories that can be utilized for the collection and reporting of statistics according to such activities.

Main Features of the Classification

The scope of ISIC in general covers productive activities, i.e., economic activities within the production boundary of the System of National Accounts (SNA). A few exceptions have been made to allow for the classification of activities beyond the production boundary but which are of importance for various other types of statistics.

These economic activities are subdivided in a hierarchical, four-level structure of mutually exclusive categories, facilitating data collection, presentation and analysis at detailed levels of the economy in an internationally comparable, standardized way.

The categories at the highest level are called sections, which are alphabetically coded categories intended to facilitate economic analysis. The sections subdivide the entire spectrum of productive activities into broad groupings, such as "Agriculture, forestry and fishing" (section A), "Manufacturing" (section C) and "Information and communication" (section J).

The classification is then organized into successively more detailed categories, which are numerically coded:
two-digit divisions;
three-digit groups; and,
at the greatest level of detail, four-digit classes.
An example of this representation follows:

- Section **D**: Electricity, gas, steam and air conditioning supply
    - o Division **38**: Waste collection, treatment and disposal activities; materials recovery
        - ▪ Group **381**: Waste collection
            - ▪ Class **3811**: Collection of non-hazardous waste

In this example, the ISIC code for 'Collection of non hazardous waste' is **D3811**.

More information about the ISIC can be found at United Nations Statistics Division: http://unstats.un.org/unsd/cr/registry/isic-4.asp