PEPPOL

DEMONSTRATOR CLIENT

Tutorial

Version 0.9.1

PEPPOL 2010-11-15

Borderless eProcurement

Let's make it happen!

Table of Contents

1. Document information

1.1. Document history

Date	Version	Initials	Changes
2009-01-03	0.1.0	JRR	Initial version
2009-04-29	0.2.0	JFA	Added descriptions for the different steps
2010-09-11	0.9.0	JGB	Updates, new features and thorough review
2010-11-15	0.9.1	JGB	Update

1.2. Editors

Initials	Name	Company
JRR	Jorge Reátegui Ravina	Alfa1lab
JGB	José Gonzales Biminchumo	Alfa1lab
JFA	Joan Farfán Armas	Alfa1lab

2. Introduction

This document guides the user through easy steps of getting started using the PEPPOL Demonstrator Client. It contains simple lessons from how to set up your catalogues as either the Contracting Authority or the Economic Operator, through sending and receiving orders to how to work with invoices.

3. Prerequisites

3.1. Java Version

It is necessary to install the latest JDK version for 32-bits. It is recommended to use version 20 (1.6.0_20 was used in development).

It is important, when installing JDK 32-bits, also to remove JDK 64-bits (if it had been installed before).

In case the Client does not start up having JDK 32-bits installed. It is necessary to set up variables in the system, so JAVA_HOME variable points to JDK.

As an example, it is showed the configuration in Windows7.

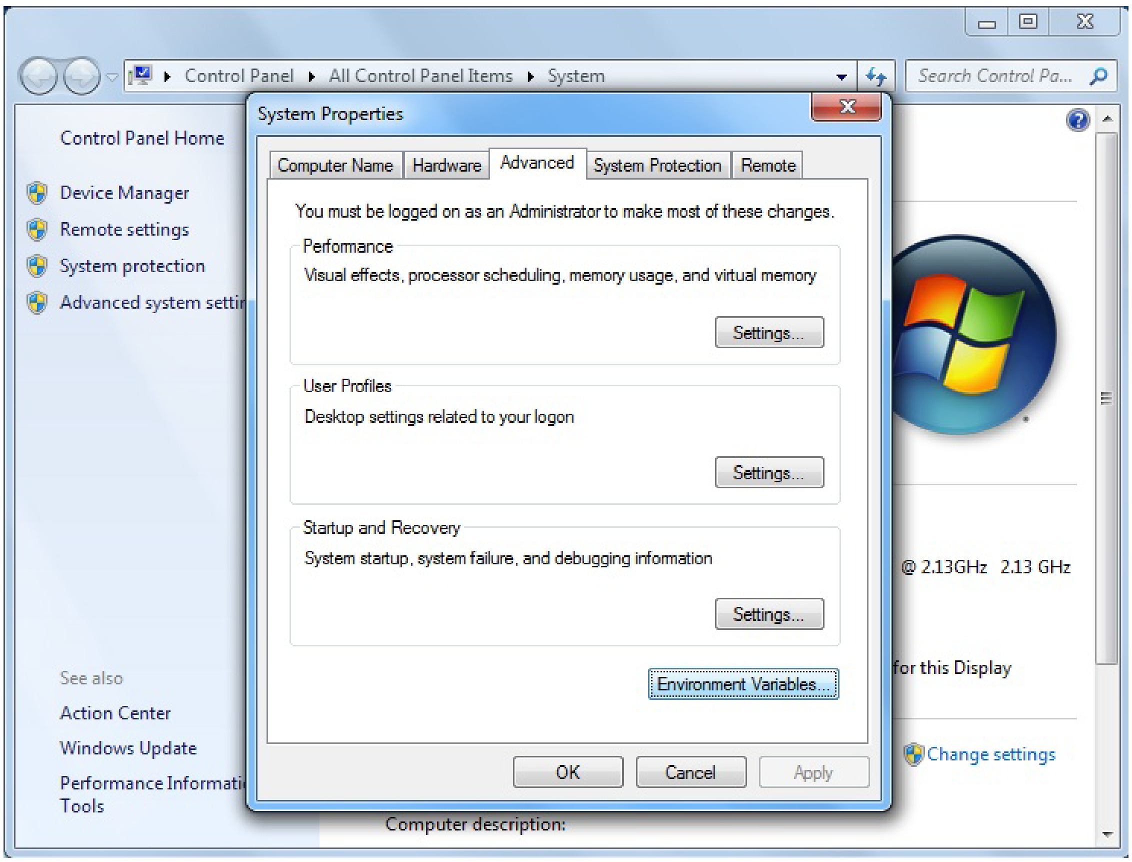

Figure 1: Opening Environment Variables interface

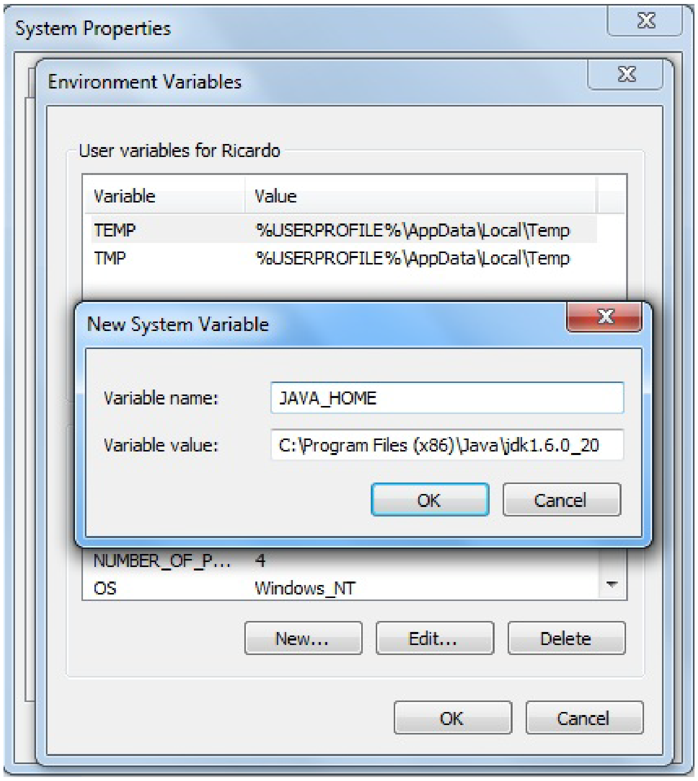

Figure 2: Setting JAVA_HOME variable

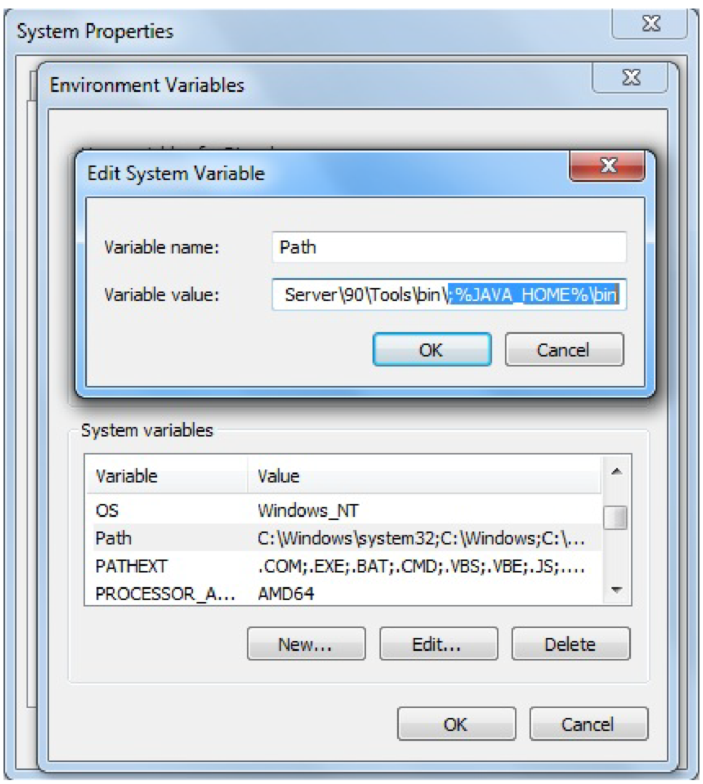

Figure 3: Editing Path variable, so the system can find JAVA_HOME variable

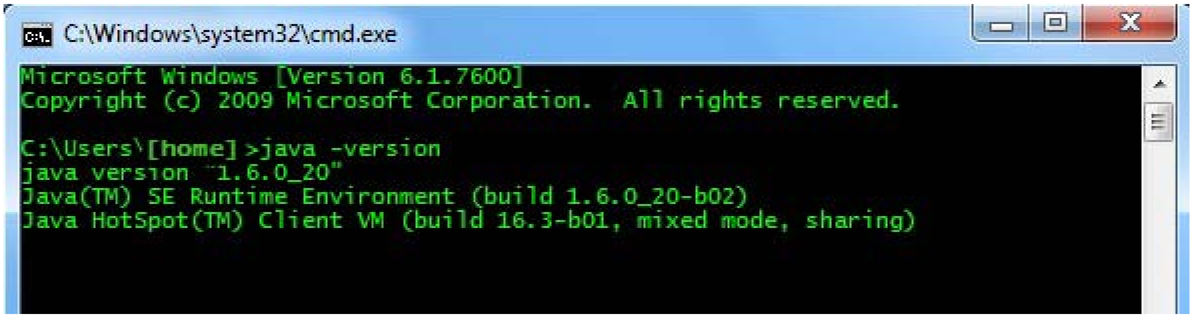

Figure 4: Testing Java reference

3.2. Installation

The demonstrator client must be installed (See the document "*PEPPOL Demonstrator Client User Guide*" under https://svn.forge.osor.eu/svn/peppol/Documents/Release%20Documentation/).

4. Lesson: Setting up the Demonstrator Client

When the client is downloaded, unzip it, you will find the following structure.

- For Windows, double click to the install-windows-x[VERSION].bat
- For Linux, double click to the install-unix-x[VERSION].bat

4.1. Select your language

The client can configured to change the language that you prefer.

To select your language follow these steps:

1. Click "*Settings/Configuration*" in the menu bar.
2. The "*Configuration*" window will appear. Then click on the "Language & Role" tab.
3. Click the "*Update the Client*" button to restart the application.

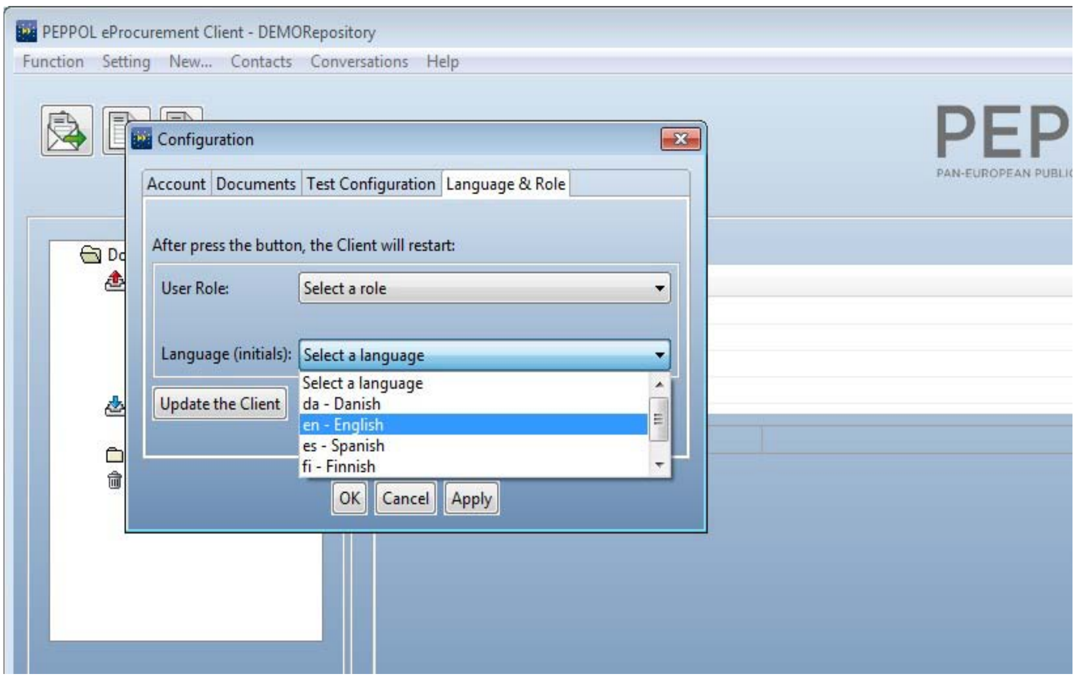

Figure 5: Selecting a language

4.2. Select a document folder and change repository.

The client uses a disk folder structure to store documents, which you receive or create. You may drop XML invoices and orders documents directly into the drop folder, which will then be displayed in the “pending” folder of the client.

To change the root folder location on the disk:

4. Click “S*ettings/Configuration*” in the menu bar.
5. The “*Configuration*” window will appear. Then click on the “D*ocuments*” tab.
6. Click the “*Browser*” button and select a folder on your machine.

To change the repository where all the demo client documents are stored, follow these steps:

1. Click “S*ettings/Configuration*” in the menu bar.
2. When “*Configuration*” window shows up, click on the “Documents” tab.
3. Click the “*Browser*” button and select a folder on your machine.

Press “*OK*” button to save your settings.

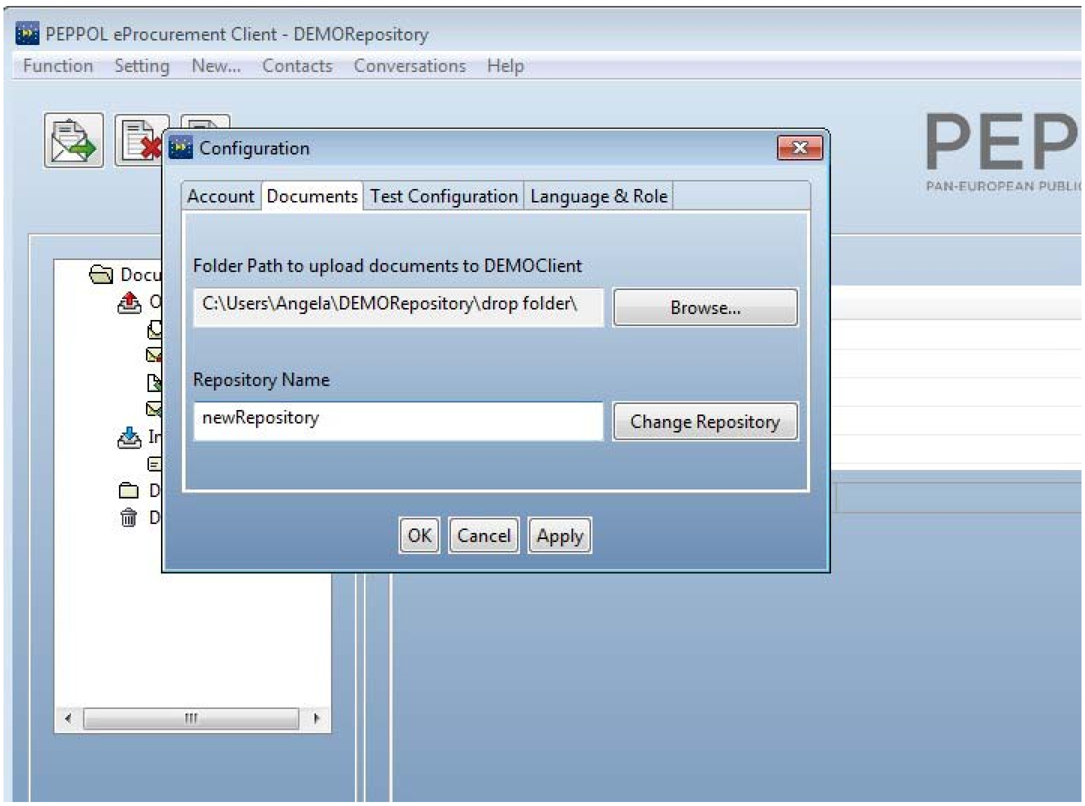

Figure 6: Configuring document repositories

4.3. Set up an account with an access point.

To send and receive documents, you must have an account set up with a service provider. The client is pre-configured to an open example service provider.

When the client communicates with the service provider, it needs a business identifier to identify itself to the service provider. It will also need this business identifier to announce to the rest of the world that it is ready to receive documents.

After you have downloaded the client, you should follow the instructions on the download site for obtaining a sample business identifier that you can use with the sample service provider. You need to configure the client with that business identifier.

1. Click in "S*ettings/Configuration*" in the menu bar.
2. The "*Configuration*" window will appear.
3. Click in "*Account*" panel.
4. You may change the following settings:

    a. **Server:** Type the URL of the LIME Access Point of your service provider, for example: "http://lime-ap.alfa1lab.com/wstransferService". You need to also receive a business identifier from your service provider.

    b. The fields "*Send channel ID*", "*Receive channel ID*" and "*Sender business identifier*" should all be set to the same value – namely the value of the business identifier you have received.

5. Press "*OK*" button to save your settings.

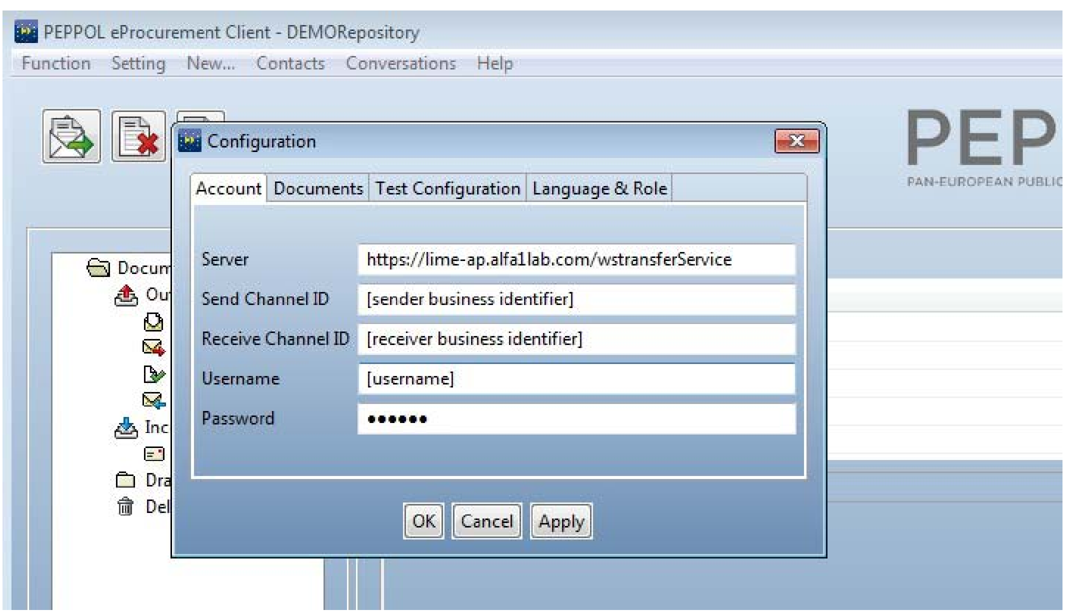

Figure 7: Setup account information

4.4. Test your transport connection

To check the connection between your demo client installed and the transport library connection follow these steps.

1. Click "*Settings/Configuration*" in the menu bar.
2. The "*Configuration*" window will appear.
3. Click on the "*Test Configuration*" tab.
4. Click the "*Test Client Configuration*" button to see:
    a. The server connection.
    b. The server provider.
    c. Authentication status.
5. Press "*OK*" button to finish.

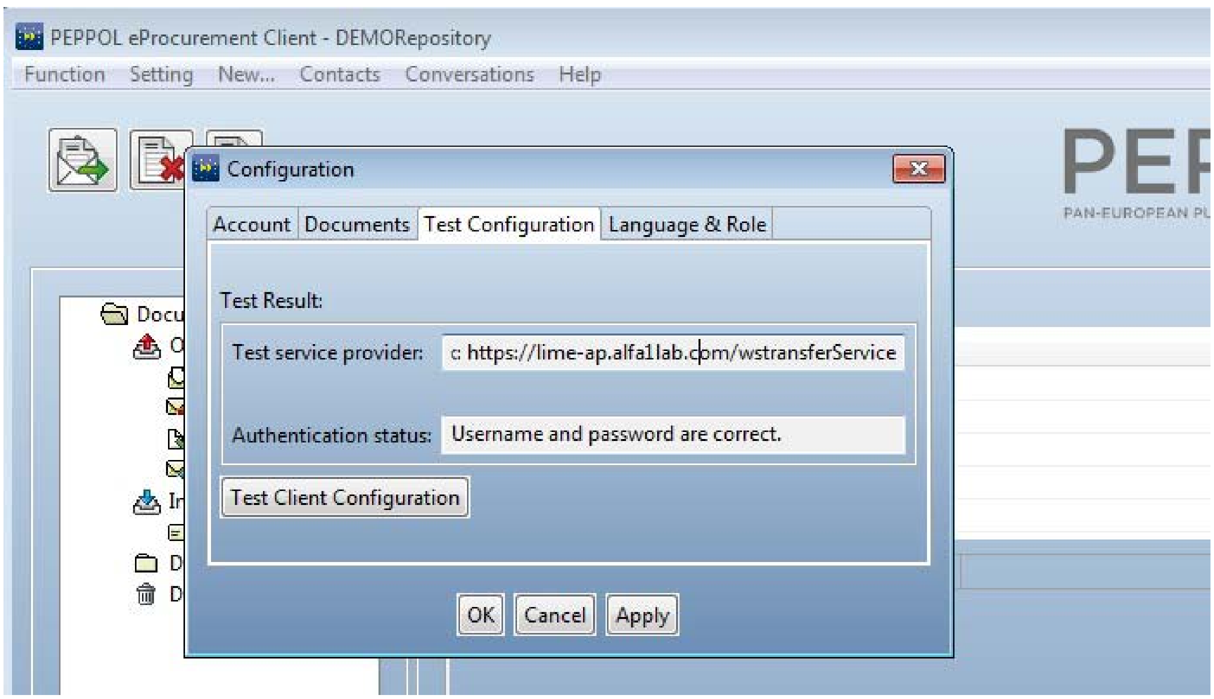

Figure 8: Testing account configuration

4.5. Create, delete or edit your contacts

To create, delete or edit select: Settings/Contacts Administration.

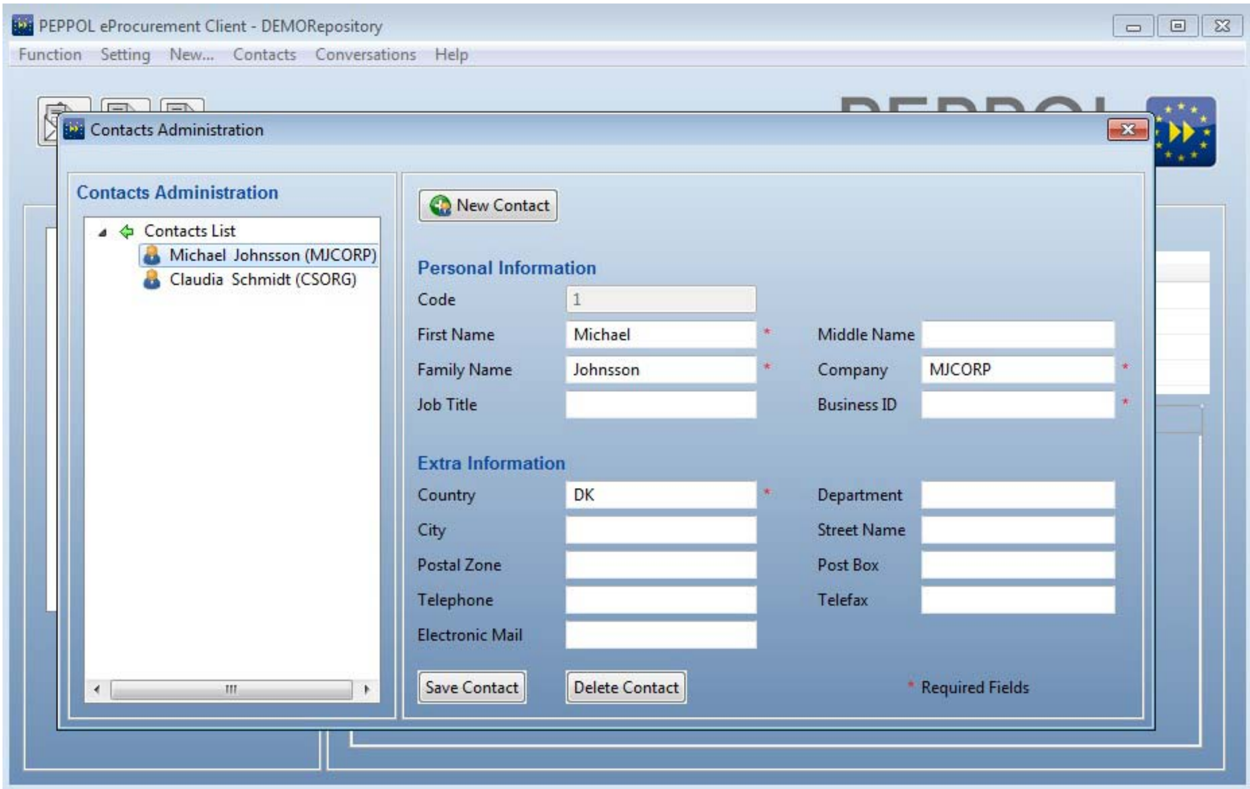

Figure 9: Editing contacts

4.6. Manage procurement conversation

In order to interact with the application, the window “Procurement conversation” will generate a history with current or past conversations between the business actors.

To check or delete some conversation click on “*Conversations/Procurements*”

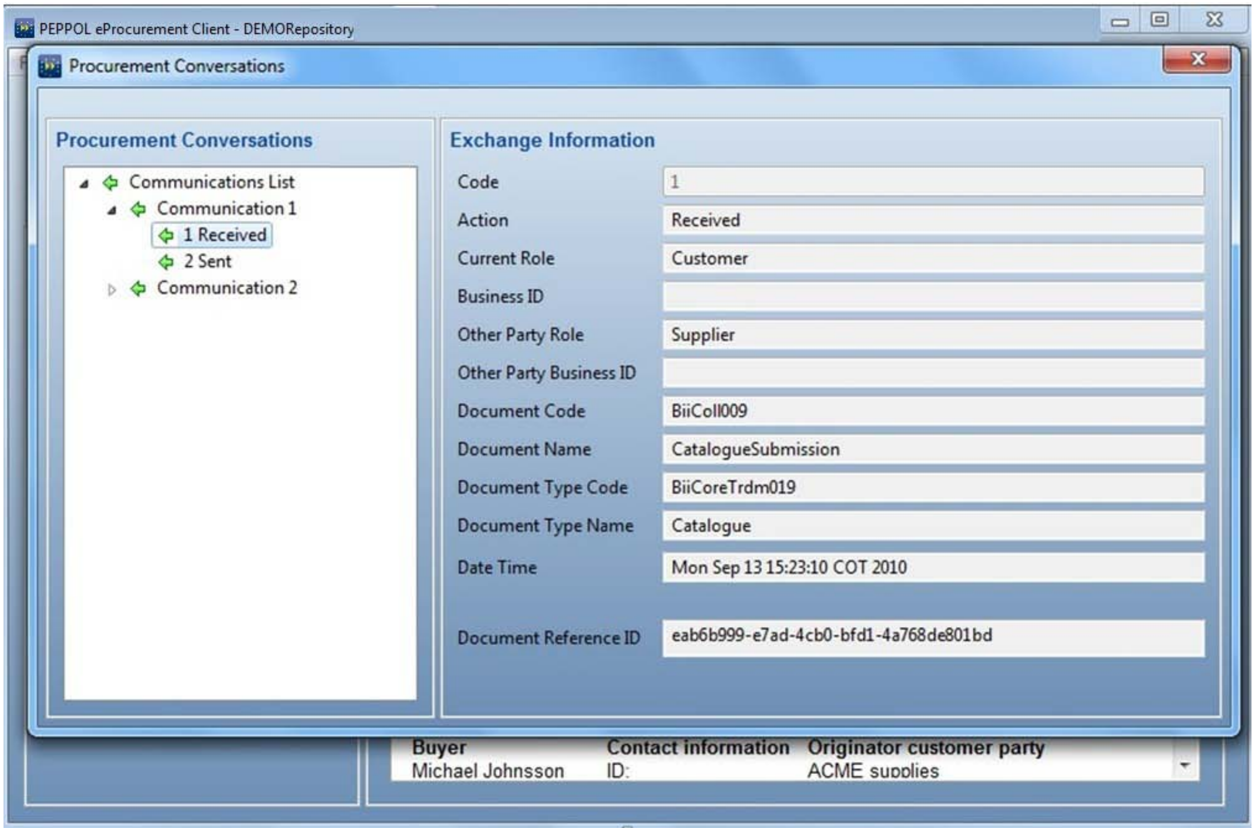

Figure 10: Communication logs

4.7. Help

To see the version of the Demo client click on "*Help/About…*"

After this you can see two links. One of the redirect to our web page the other one redirects you to the Sub Version code repository where you can download the source code of the Demo Client application.

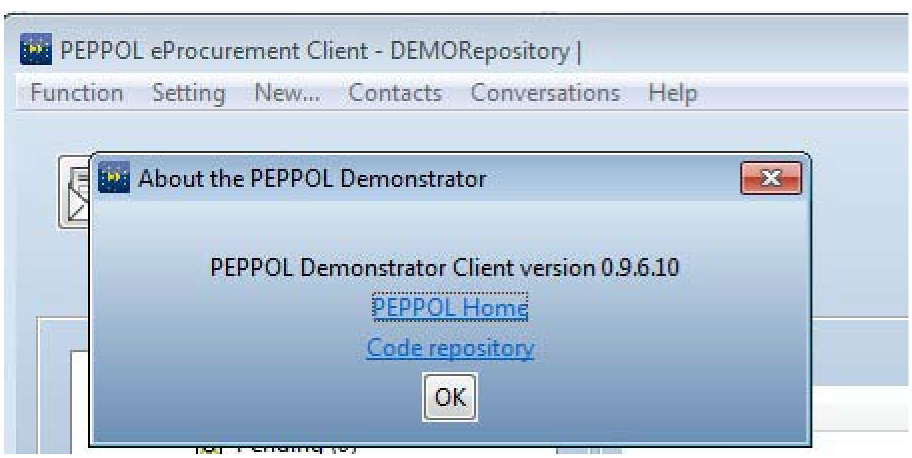

Figure 11: The About window

5. Lesson: Creating an Order

You can use the client to create several documents, by using the '*New…*' menu.

By entering the business identifier of the receiver, you choose where the client will send the document. The client uses this identifier to find out where to deliver the document, by looking it up in a registry.

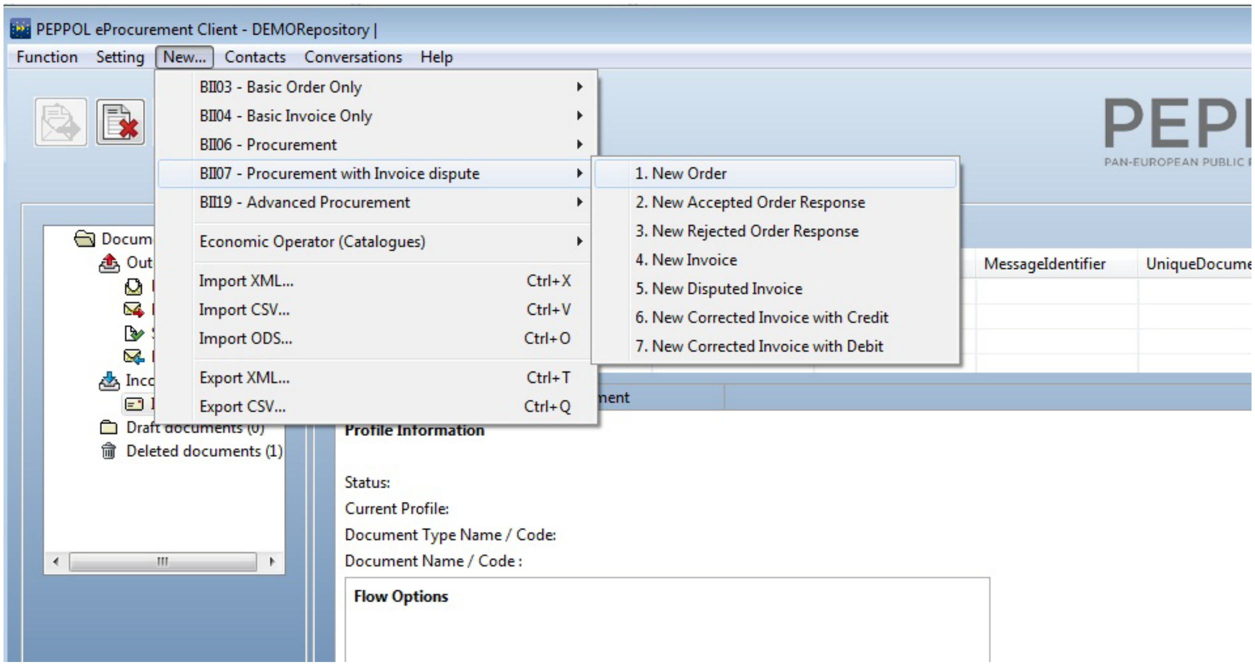

Figure 12: Selecting the creation of a new document in the main menu.

1. The field "*Receiver ID*" is important: By entering the business identifier of the receiver, you choose where the client will send the document. The client uses this identifier to find out where to deliver the document, by looking it up in a registry

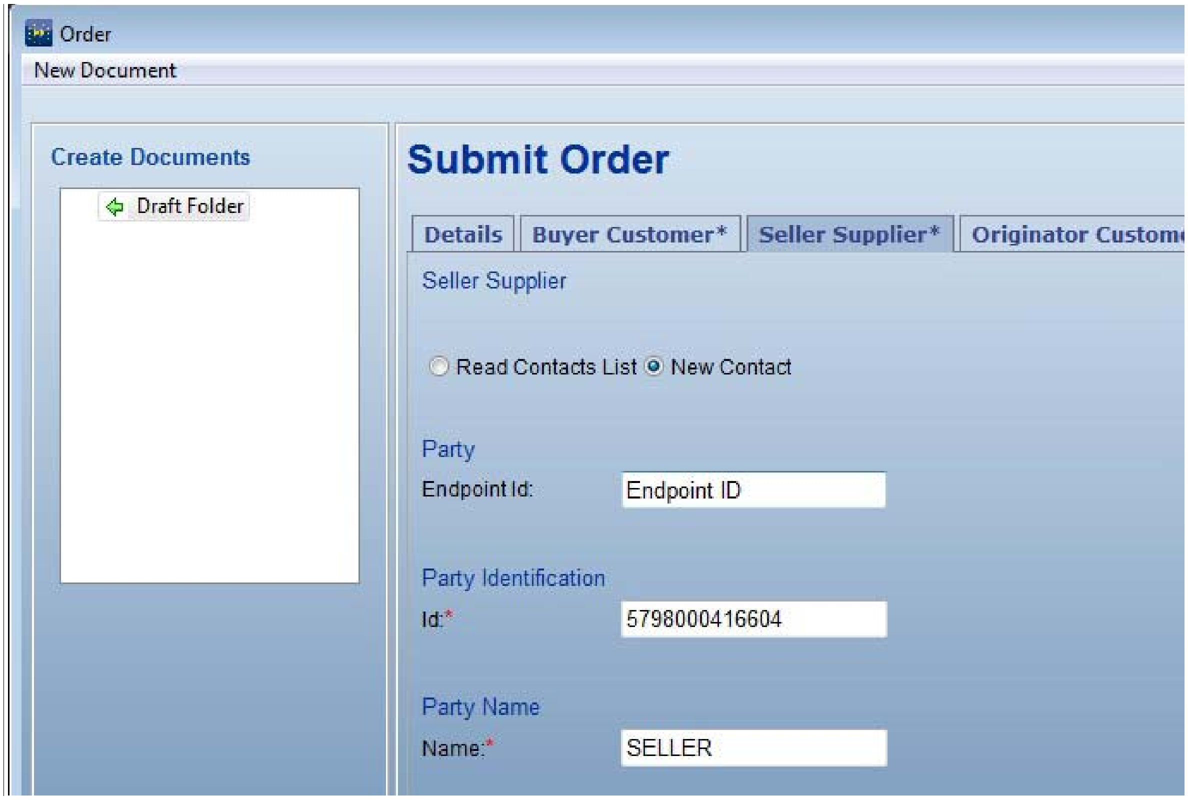

Figure 13: Insert manually the Business Identifier, or select from the contacts.

2. You can go through the different tabs and edit its content

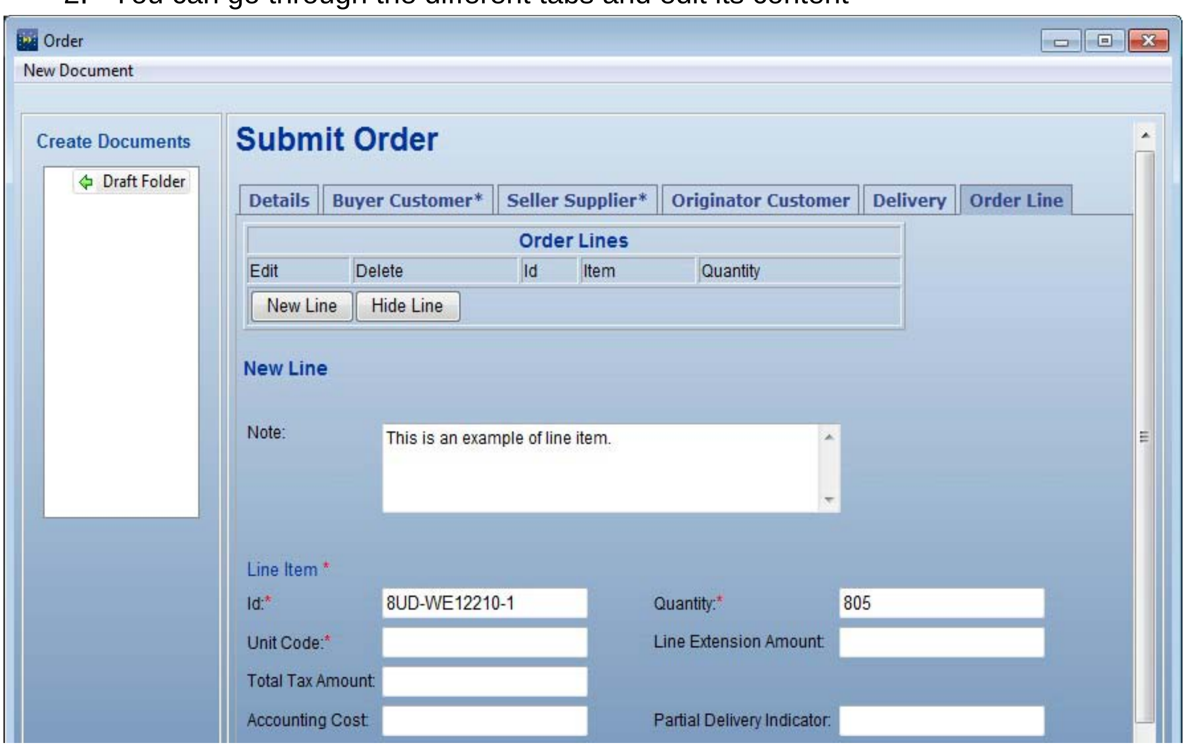

Figure 14: Editing an Order Line

3. Press "*Save to draft folder*" button to save your unfinished document then you can continue to work on it at a later time.
4. Press "*Prepare to Send*" button to save your document. After this the document will be ready to send from the main window of the Demonstrator Client.
5. Press "*Validate*" button to validate the whole document through the different validation layers.

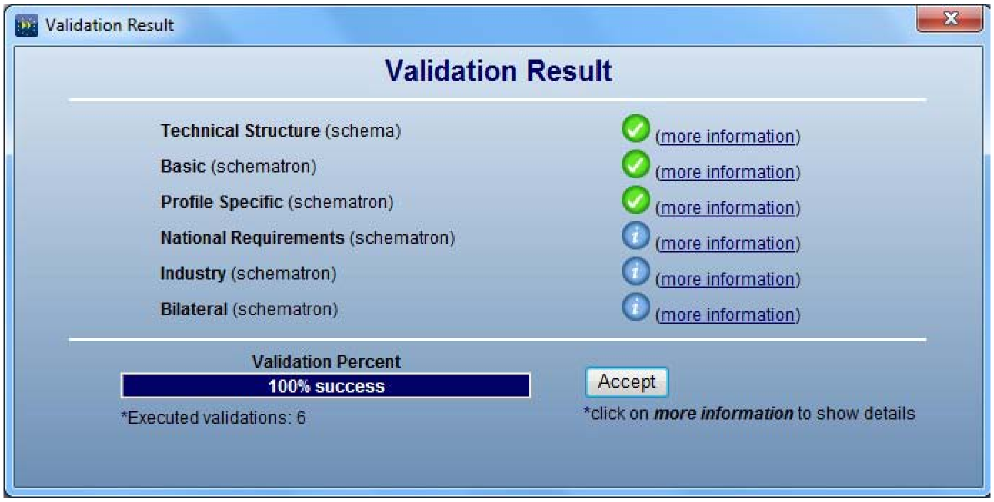

Figure 15: Result of the validation layers

6. Lesson: Sending an Order

You can send your documents to start o continue the flow of the business transaction following these steps.

1. Click "Documents/*Outgoing Documents/Pending*" at the tree menu of the main window.
2. The Documents recently created will appear at the right side at the "*Documents*" section.
3. Select a document by clicking on it, and then you can see some description about the document at the tab bellow call "*Document flow*". This section will shows the status of the document, the current profile, the code of the document and a special section showing you what is the next step to continue with the transaction business.
4. Select the "*Document*" tab to see the view of the document.

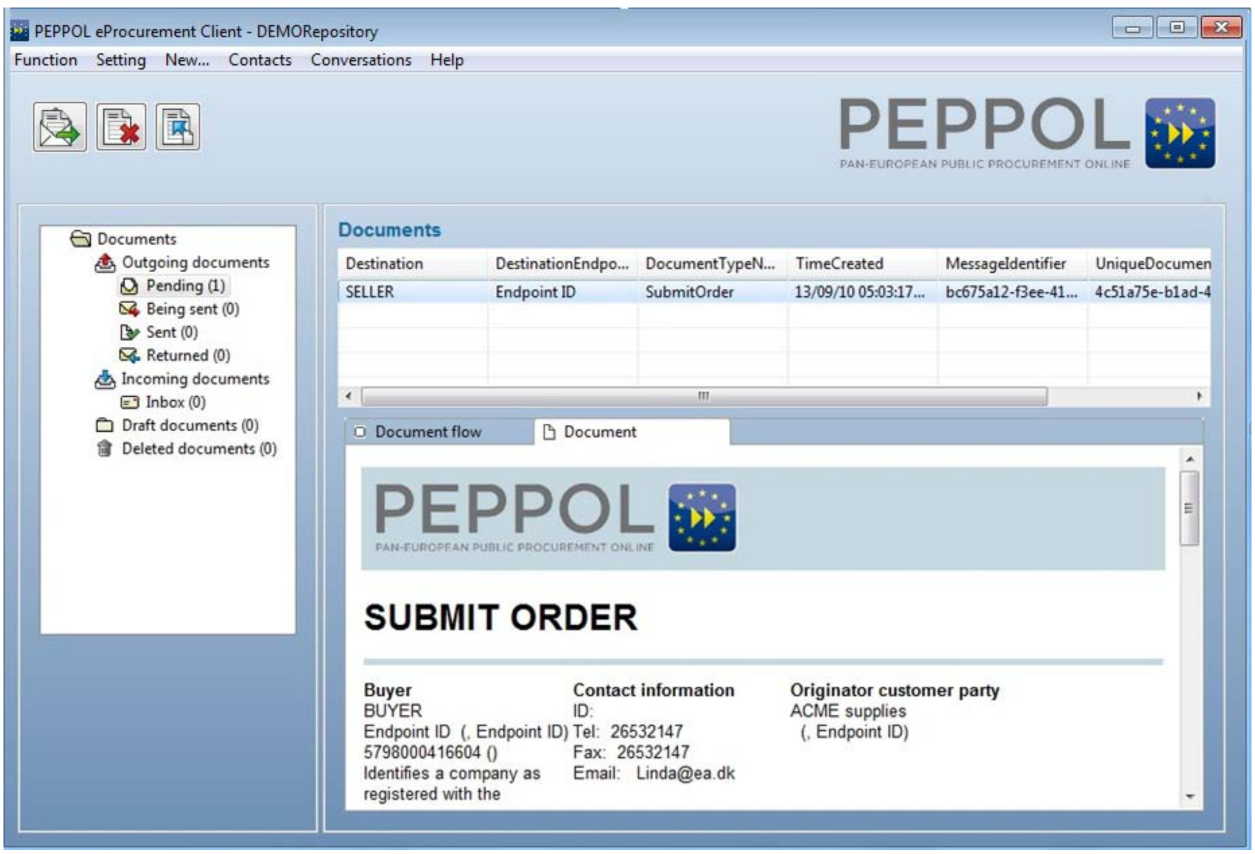

Figure 16: Preparing to send the Order document

7. Lesson: Receiving documents

The demonstrator client will check regularly (and automatically) with your service provider if any documents for you have been received. If so, they will be downloaded to your inbox. Others can send documents to you by referring to your business identifier in the documents that they send.

- The Documents will be placed in "Incoming Documents/*Inbox*" on the left tree view.
- Click in "*Incoming Documents/Inbox*" to see the documents received.

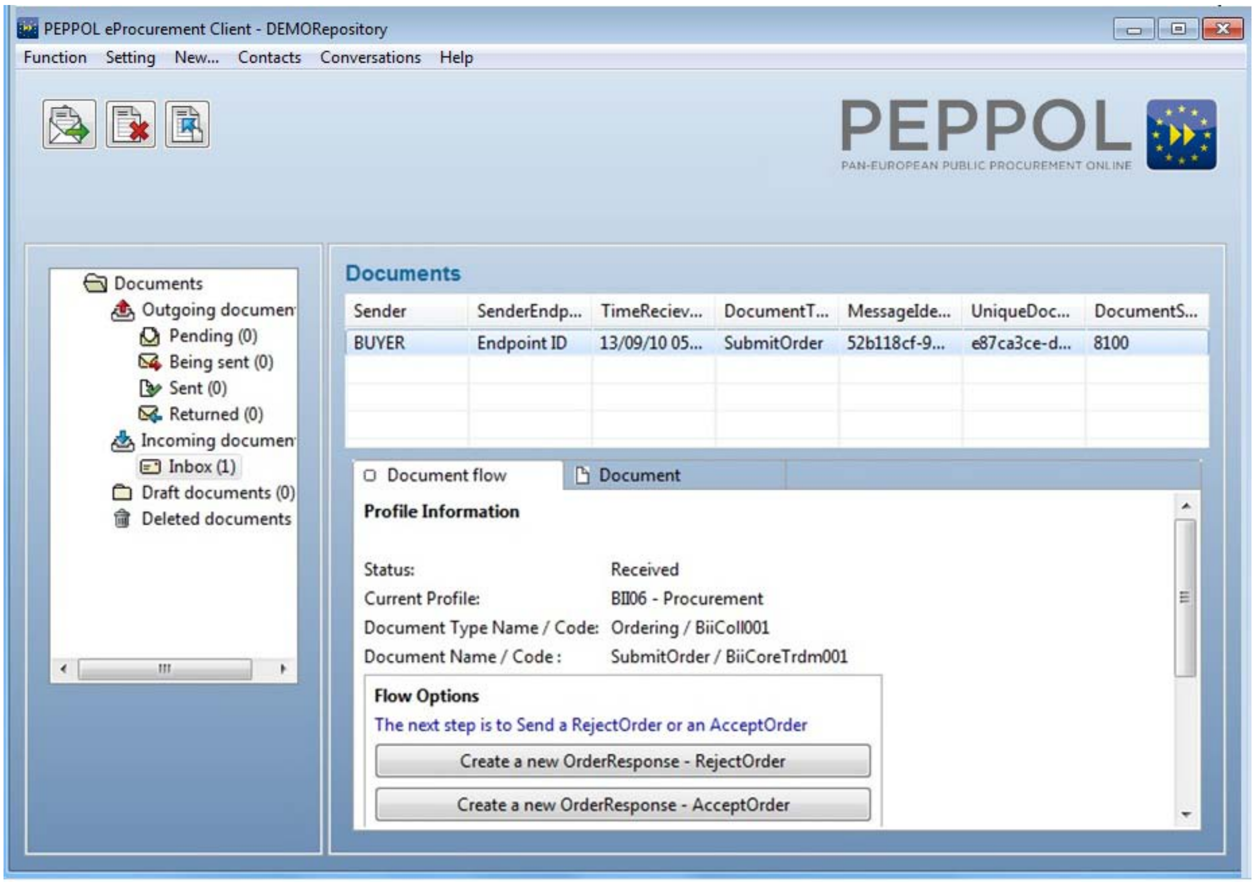

Figure 17: Showing the possible options to follow the flow according the order received

8. Lesson: Importing documents

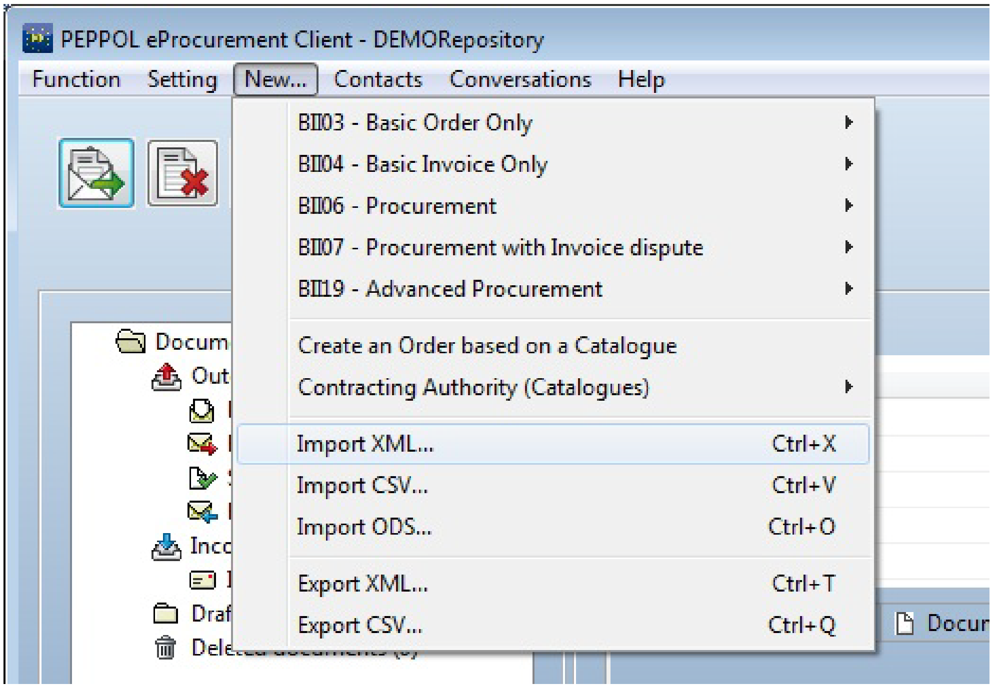

Figure 18: Showing the types of importing

To import an extern document select the kind of the file that you want to import.
If you want to import and xml, csv or ods file at the Demo Client will show you a new window where you can indicate:

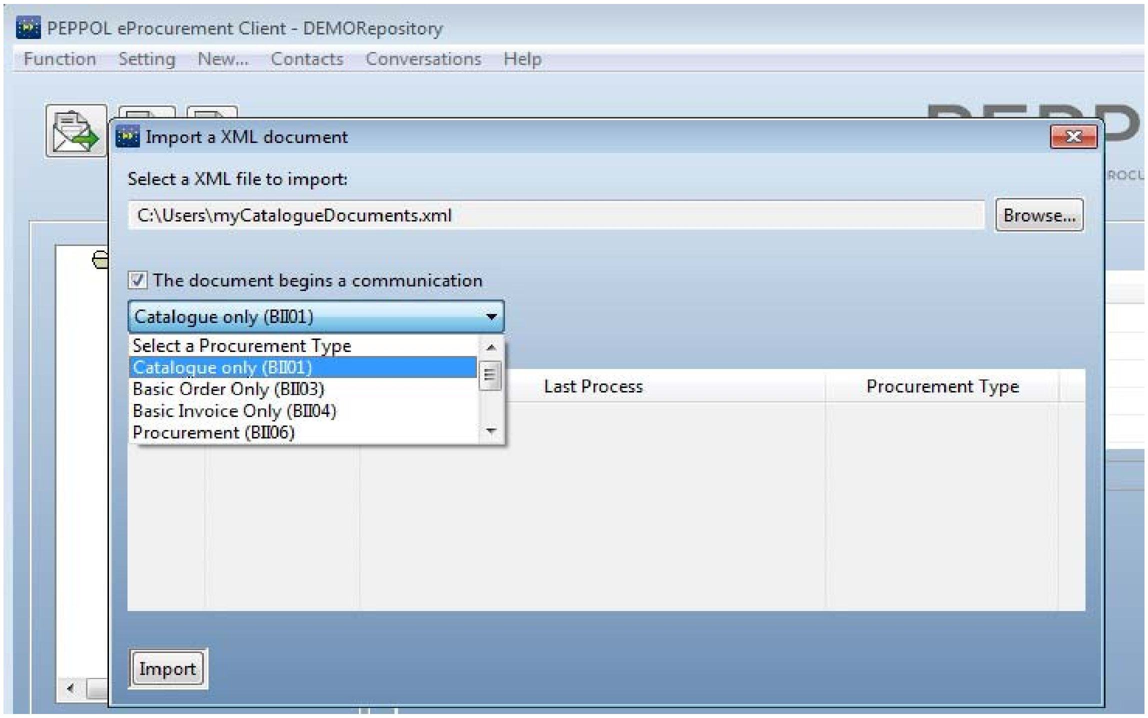

Figure 19: Importing interface

First, you have to select your xml, csv or ods file, then mark the option to indicate to the system if the current document will begin a communication, After this select the type of the procurement. Finally press "*Import*" button.

If not mark the option, you can select any communication in the table, so the imported document can follow the flow.

Your document imported will be placed in the Draft section.

9. Lesson: Working with XML files

Behind the scenes, all the documents that the Demonstrator Client handles are saved as XML files. They will be placed in the folder structure that you can change in the ‘Documents’ tab of the configuration window.

Here you can either access documents that you have received as XML files, or, if you have an ERP system that is capable of generating invoices and orders in the XML format used by the client, you can place them in a ‘drop folder’. By placing documents here, they will be picked up by the client and will become visible in the ‘Pending’ folder.

9.1. Accessing the document

To access documents that you have received, you go to an ‘Inbox’ folder under the document folder for the demonstrator client – you can see where this folder is located in the “Documents” tab of the configuration window.

First, go to your user home folder:

On a windows machine, could be called in different ways:

- C:\Users\[USER_NAME]\
- C:\Documents and Settings\[USER_NAME]\

On an Unix machine, could be called:

- /home/[USER_NAME]/

Then go to the folder inbox of the repository of the Client, its name is showed in the “*Documents*” tab of the configuration window. For example, if it has the default name, go to: DEMORepository\plugins\Plugin\MessageStore\Incoming documents\Inbox\

There will be 2 types of XML documents in this folder – one ending with “.xml”, and one ending with “*.meta.xml*”. You can ignore the documents ending on “*.meta.xml*” – these are only used internally by the Client.

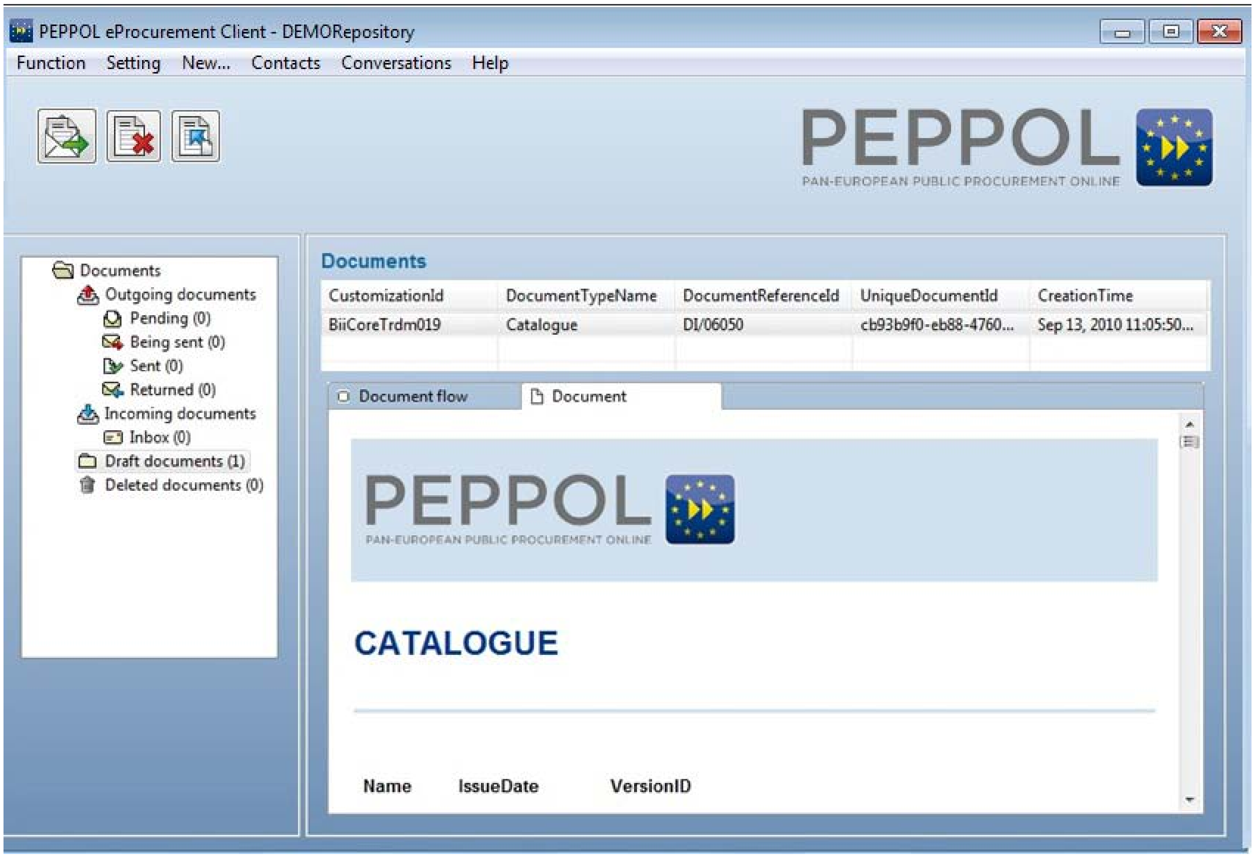

Figure 20: Document in Inbox folder which can be found physically in XML format

10. Lesson: Exporting XML and CSV files

The Demo Client application allows the user to export the document as xml or csv file.

To Export your document you have to select it from the table and then choose the option that you need.

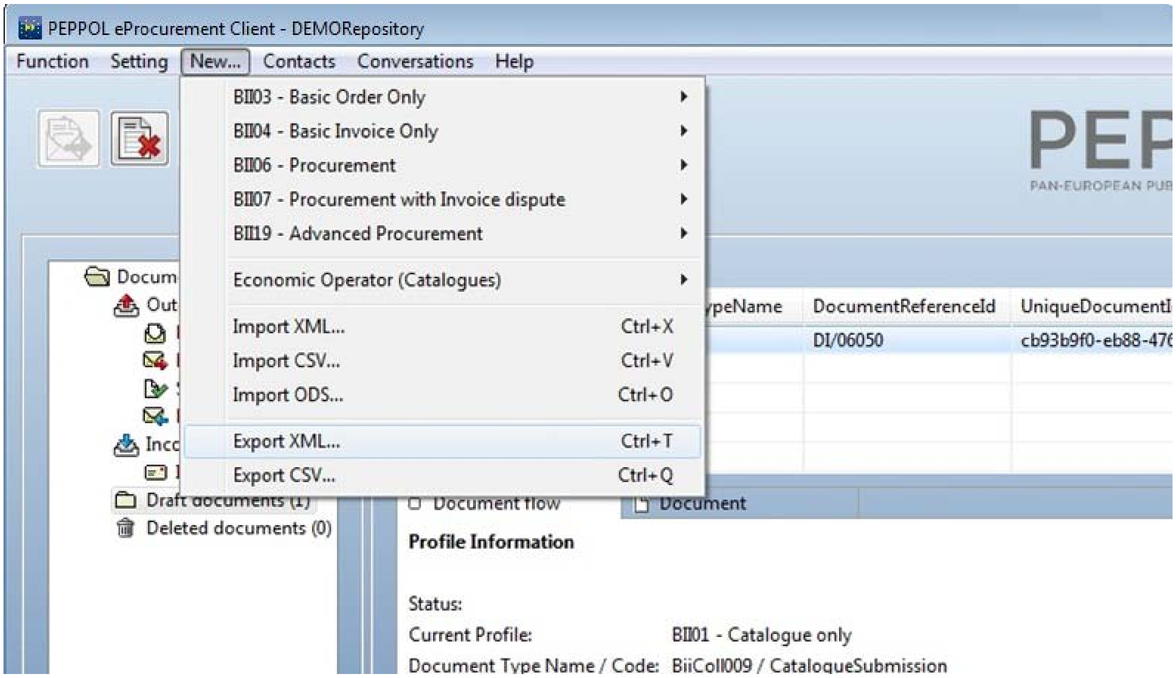

Figure 21: Showing the types of exporting

11. Lesson: Managing Roles

Depending of the kind of operations that the user wants to do, the Demonstrator Client could be configured as an Economic Operator (EcOp) or as a Contract Authority (CA).

11.1 Manually (Older versions)

Go to the Client binary folder. Inside, open the WP3config.xml document and modify the field called "*role*" with one of the options: "EcOp" or "CA". After this, restart the Client.

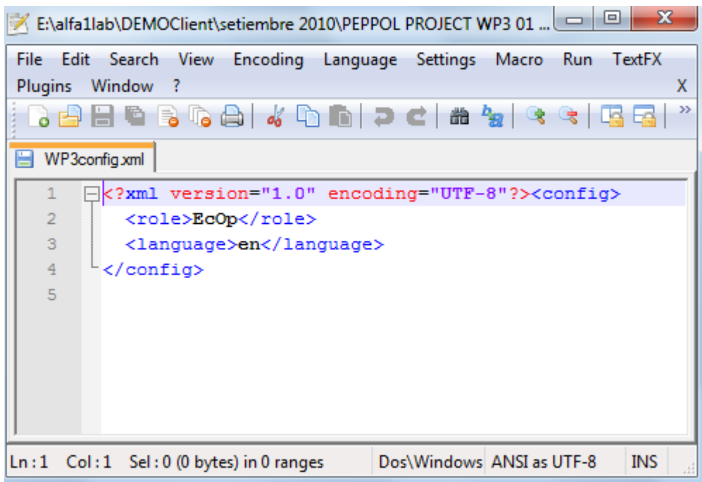

Figure 22: Editing the WP3config.xml

11.2 Trough DEMOClient

The Client allows now to change the role in the Configuration interface. To restart the Client with the new role, select the "Update the Client" button.

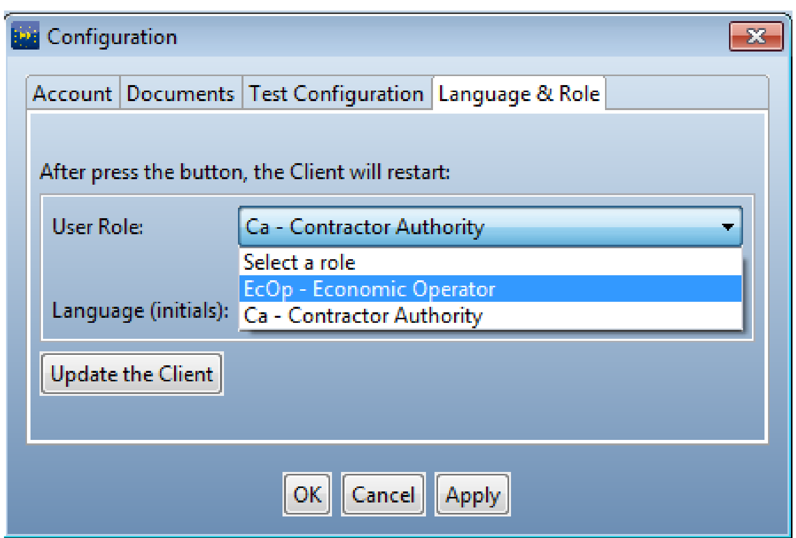

Figure 23: Editing the WP3config.xml

12. Lesson: Creating a Catalogue

The steps are almost the same as the lesson “*Creating an Order*”.
The role that could create a Catalogue document is the Economic Operator (EcOp).

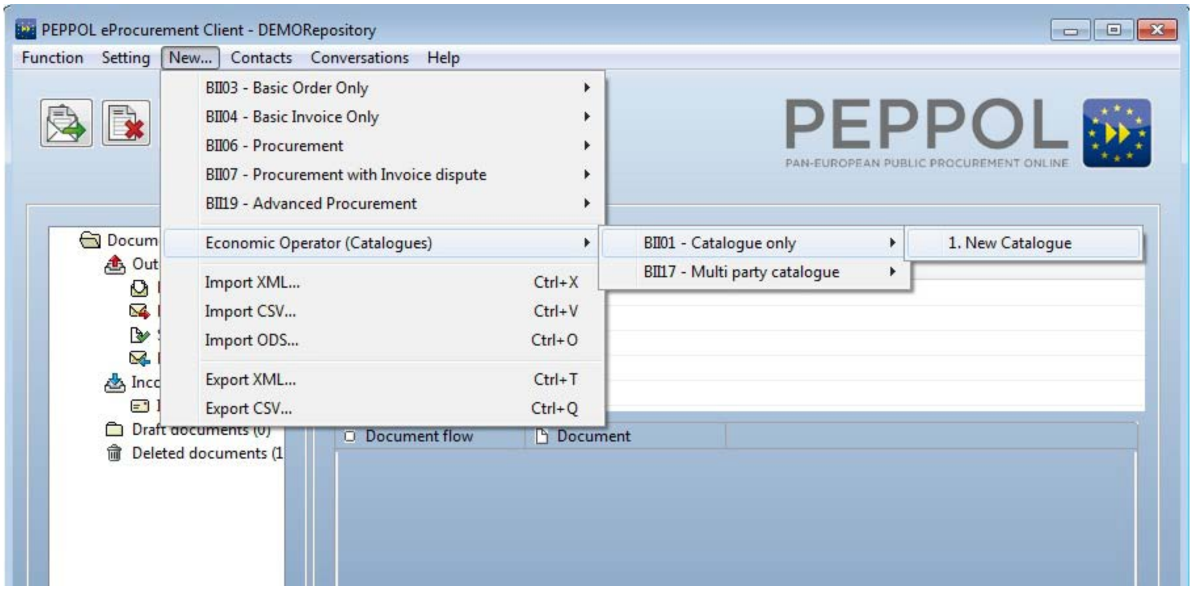

Figure 24: Creating a Catalogue from the main menu

You can go through the different tabs and edit its content

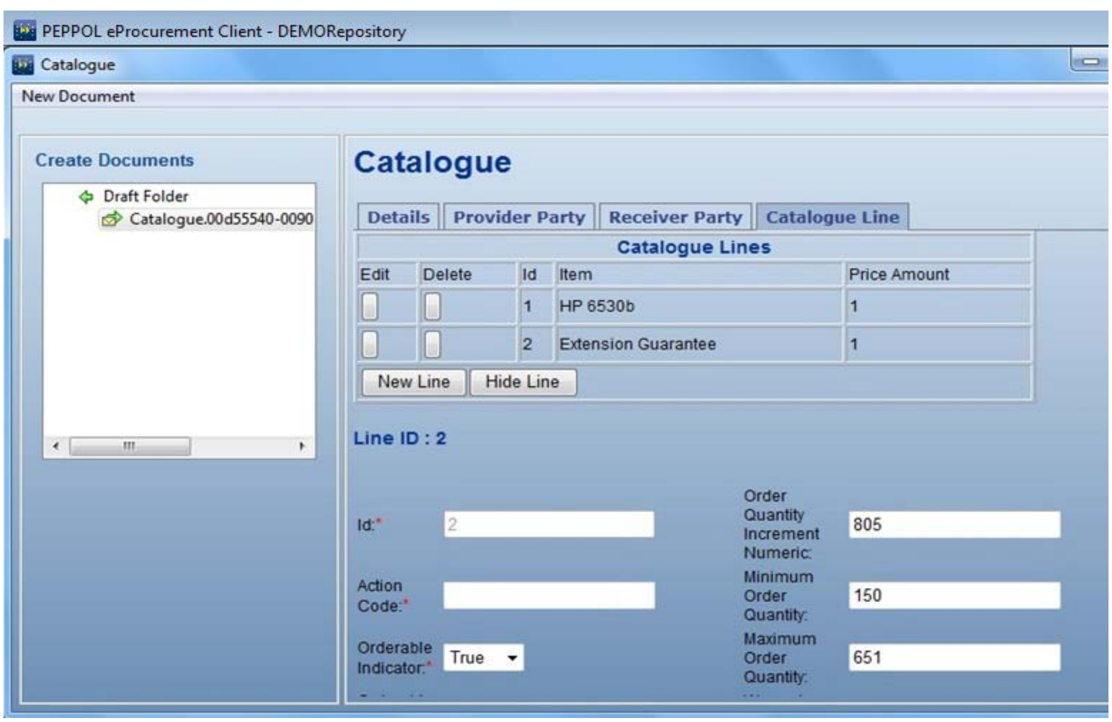

Figure 25: Editing an Catalogue Line

In whichever folder that yours Catalogues or any documents are, the Client allows to see in a HTML way its content.

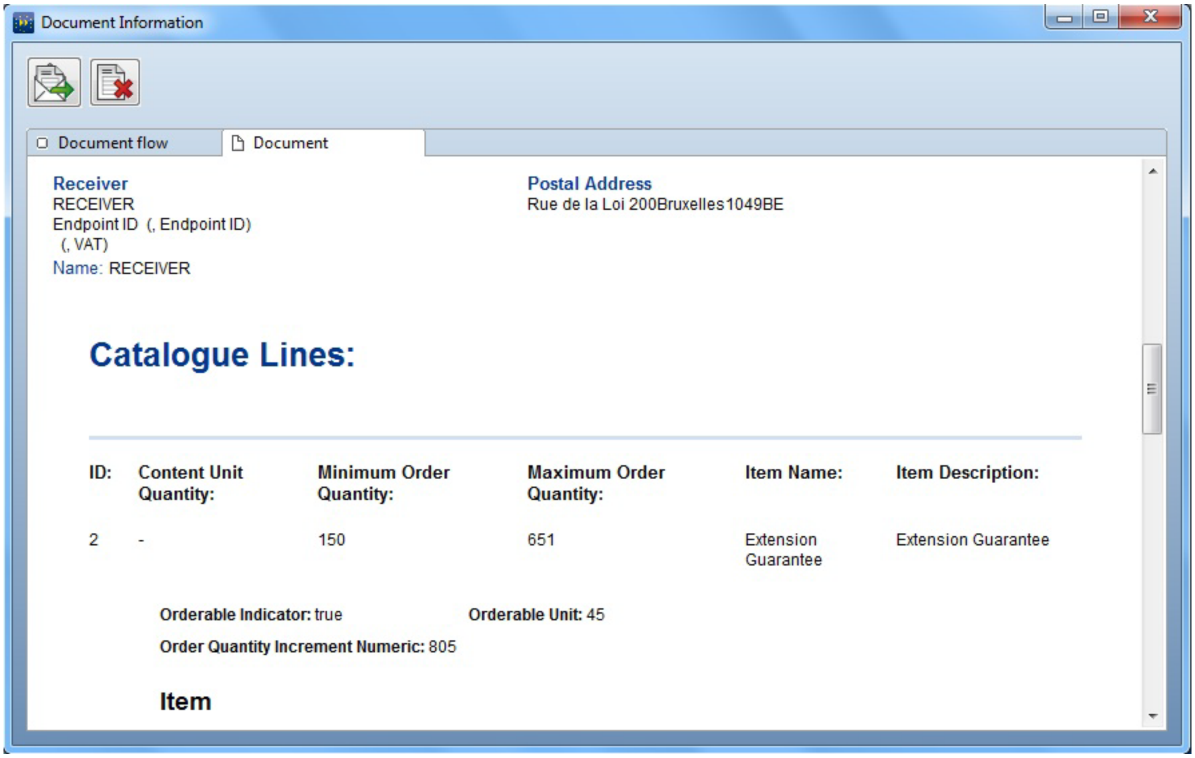

Figure 26: Displaying a Catalogue in a HTML form

13. Lesson: Creating Call For Tender and Tender documents

13.1. Creating a Call For Tender document

The role that could create a Call For Tender document is the Contract Authority (CA). Select the option in the main menu.

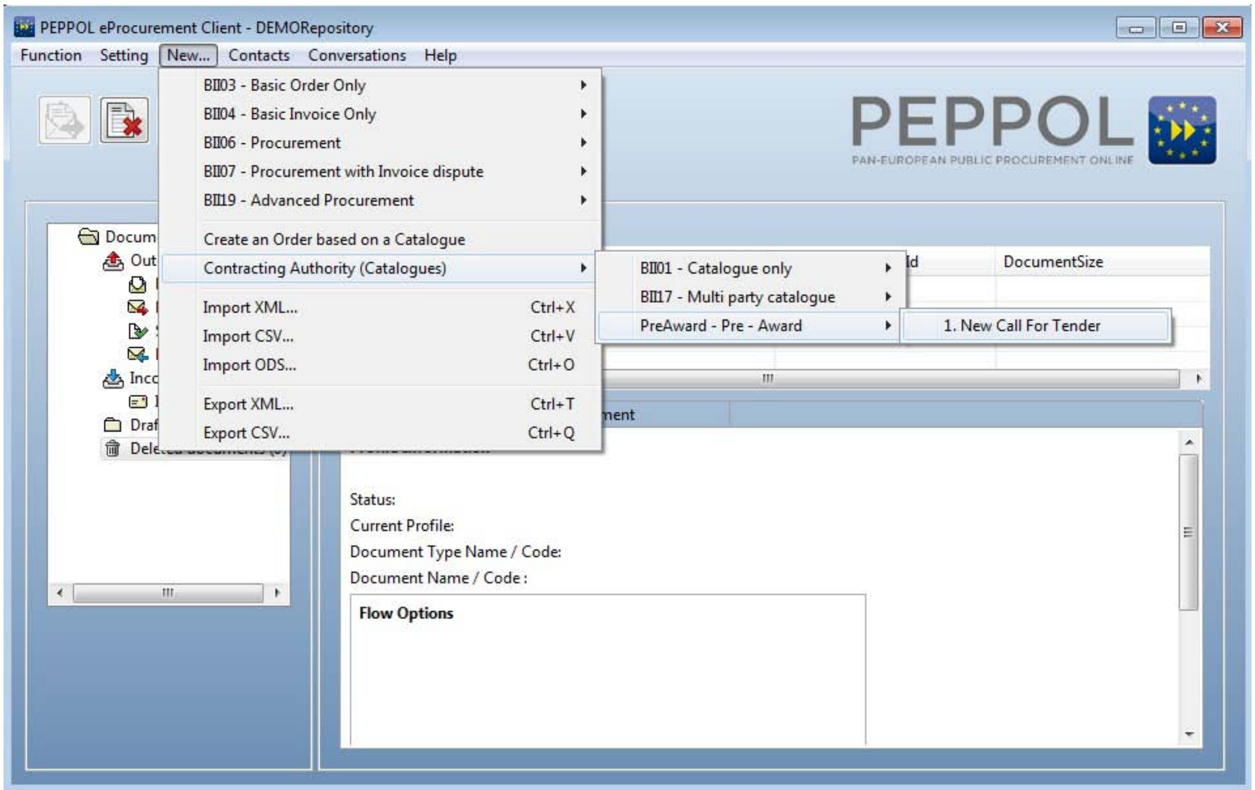

Figure 27: Creating a Call For Tender document with CA role

13.2. Creating a Tender document

This can just be created by an Economic Operator (EcOp). This option will appear when this EcOp receives a Tender document in its inbox

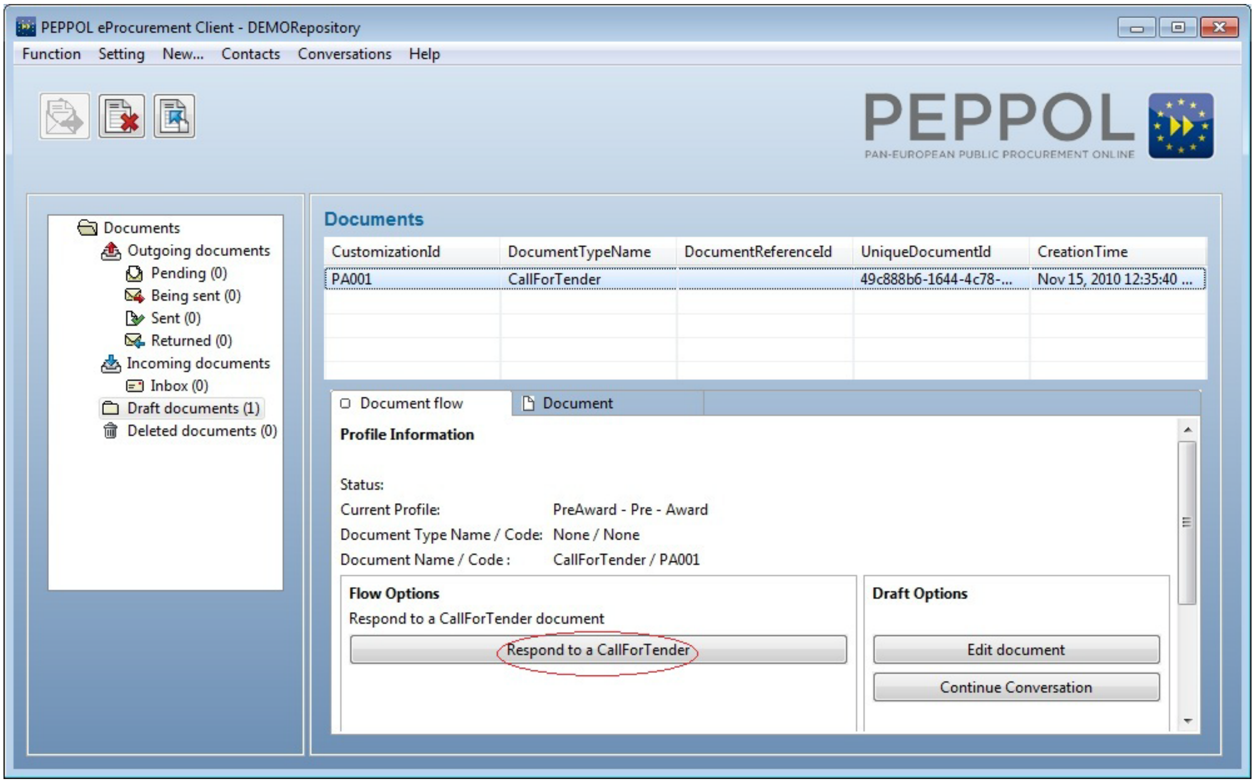

Figure 28: Showing the Tender option, so the EcOp can create it from the Call For Tender document received

14. Lesson: Creating Order from a Catalogue document.

Demonstrator Client allows creating Order documents based in Catalogues, so the new Order can import its information and the user does not have to insert whole again.

This Order created, could be place in Draft or Pending folder.

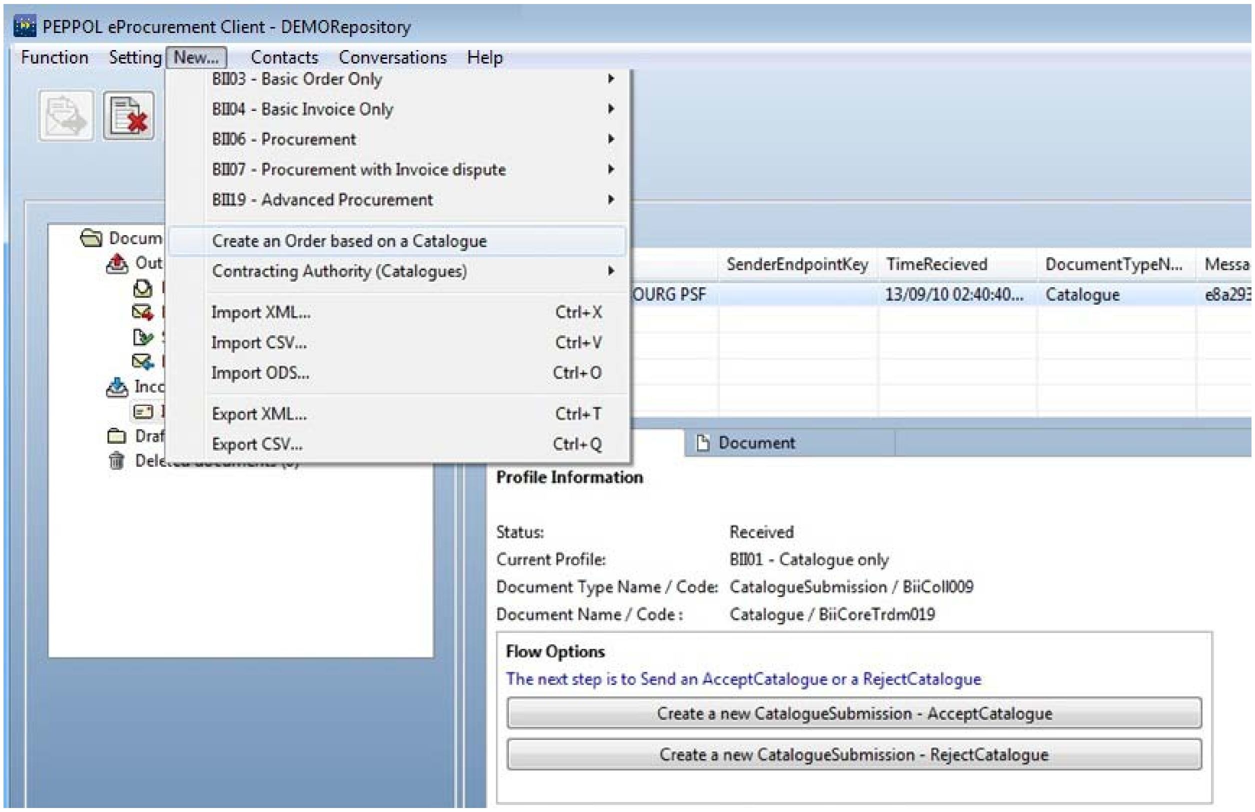

Figure 29: Selecting the option in main menu, after selecting the catalogue involved

15. Paradine WebService: Using eCl@ss.

The DemoClient Application has a new implementation of webservice provided by Paradine, wich helps to the user to found many products from eCl@ss system.

You can create a Call for Tender document with data lines provides by Paradine following these steps.

1. As a CA Role, Click “New/*Contracting Authority (Catalogue)PreAward – Pre-Award/New Call For Tender*” at the menu bar of the main window.

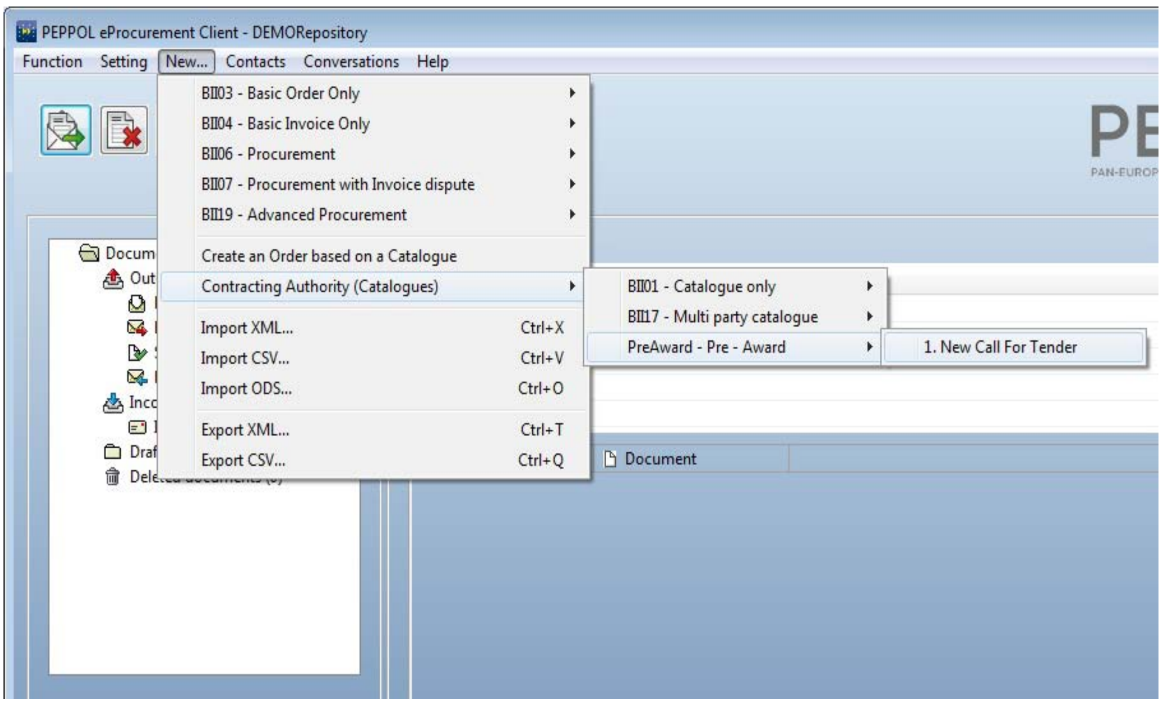

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Figure 30: Selecting creation of new Call for Tender

2. Go to, "*Procurement Project*" tab at the document creation interface and click on "New Request for Tender Line" button to work with the eCl@ss section. Then click on "Ask eCl@ss" button to continue.

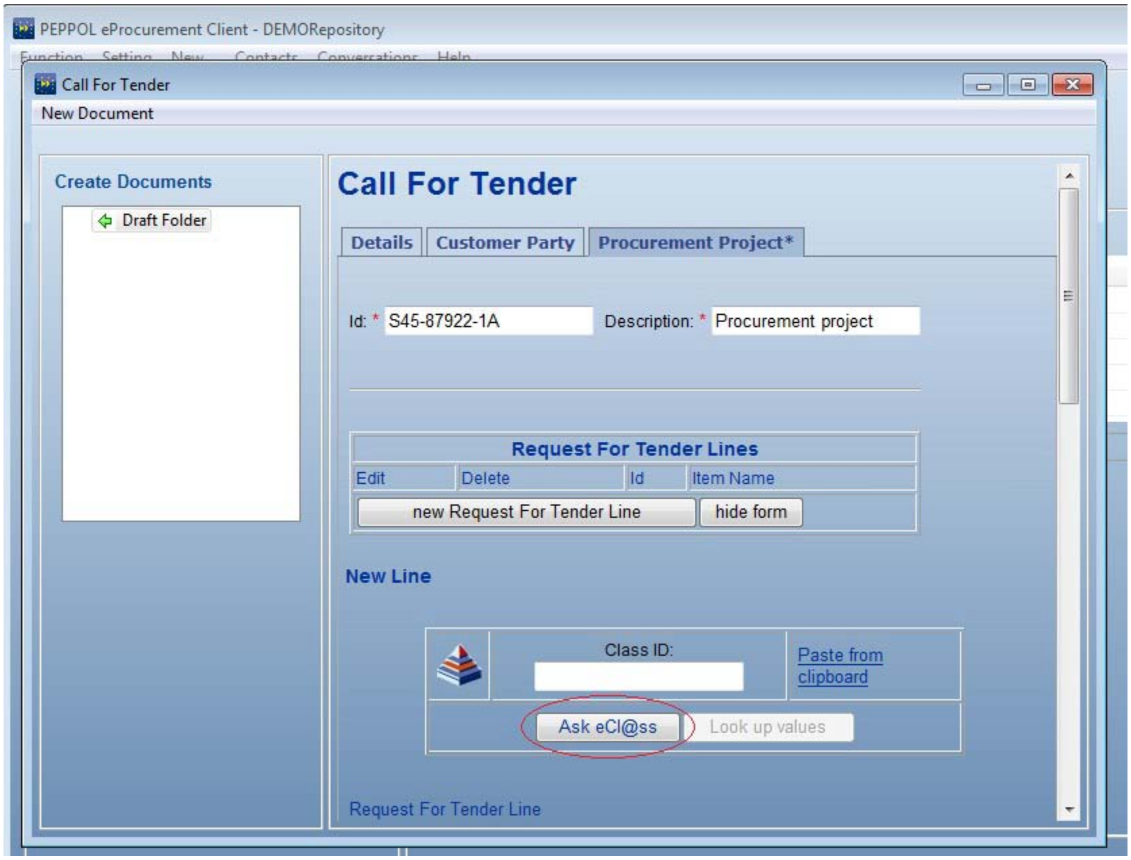

Figure 31: Asking to eCl@ss for data.

3. After ask eCl@ss for data the application will open a browser with the Paradine official site created to provide data. To use the system you have to log-in on the system using your own login and password.

Figure 32: Login into PEPPOL ePPS.

4. After successfully login one easy process to find data that you are looking for could be clicking on “Search in PEPPOL” button.

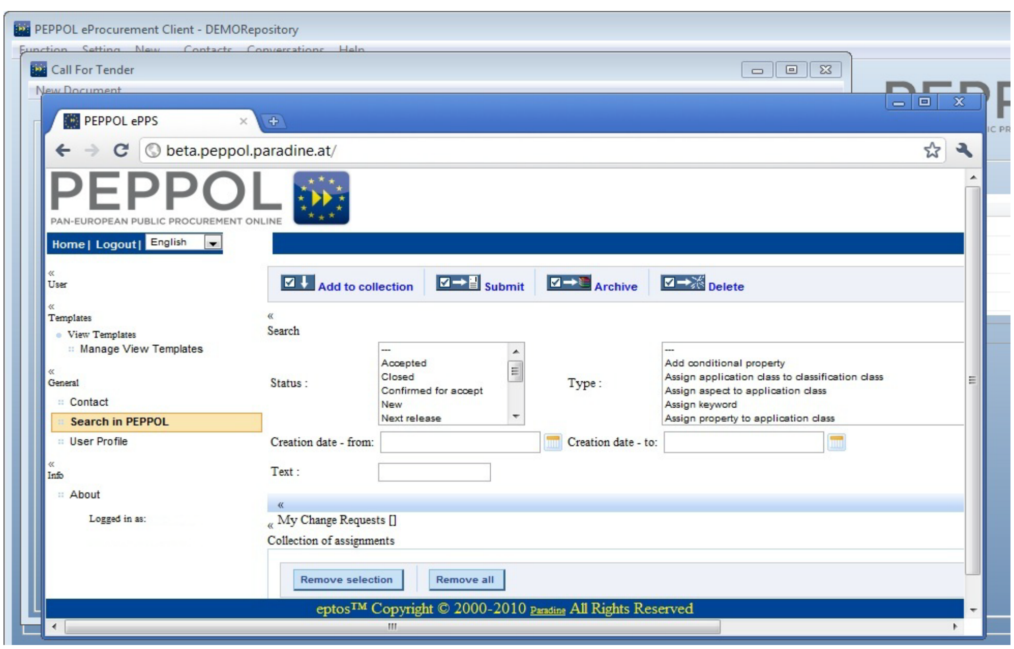

Figure 33: Searching on eCl@ss.

5. At the PEPPOL ePPS site write a description o name at the field that you can see in the screenshot, then press the “search icon” button to start the search.

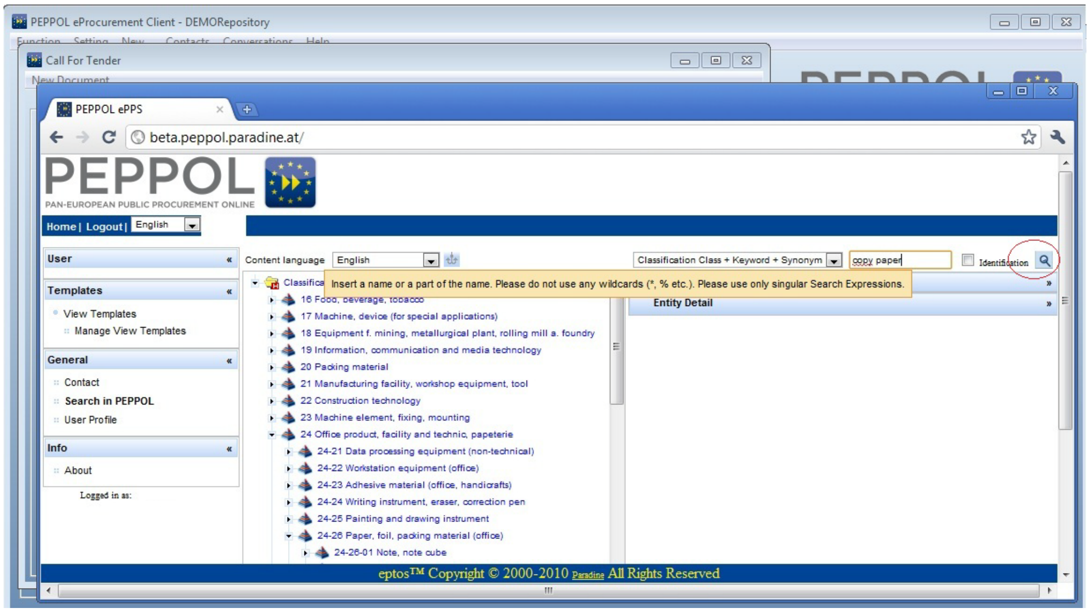

Figure 34: Searching with some description.

6. Now you can see a list of products refers to your recently search, Please select one of them as this tutorial shows.

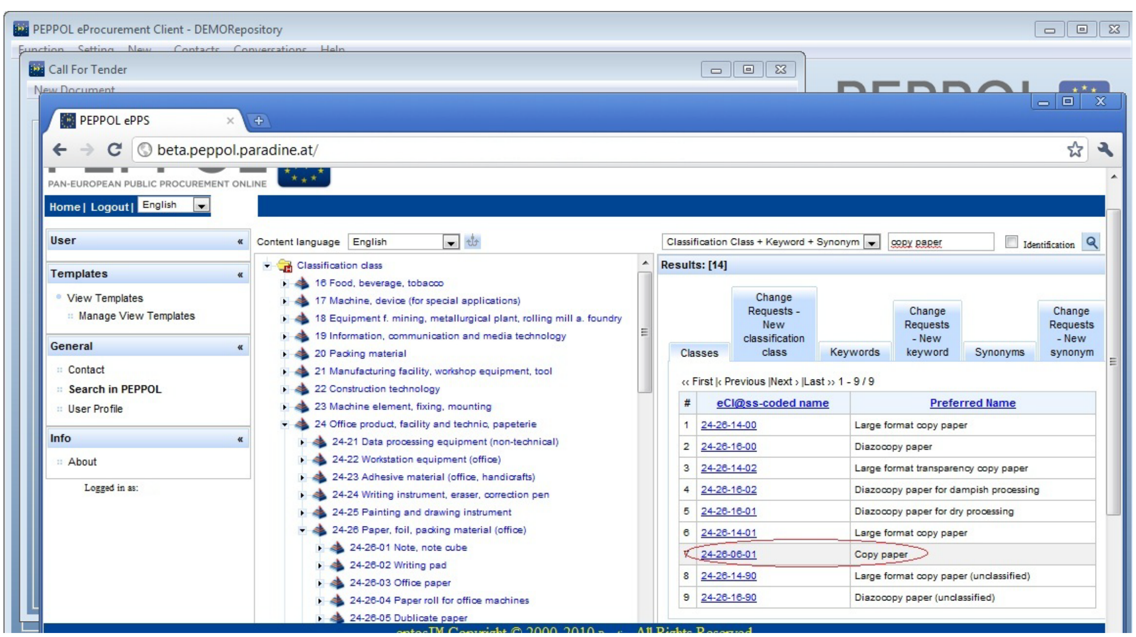

Figure 35: Selecting your product from eCl@ss.

7. After your selection you will be able to get the eCl@ss ID of the product that helps you with your request. Click on "[Copy to clipboard]" link.

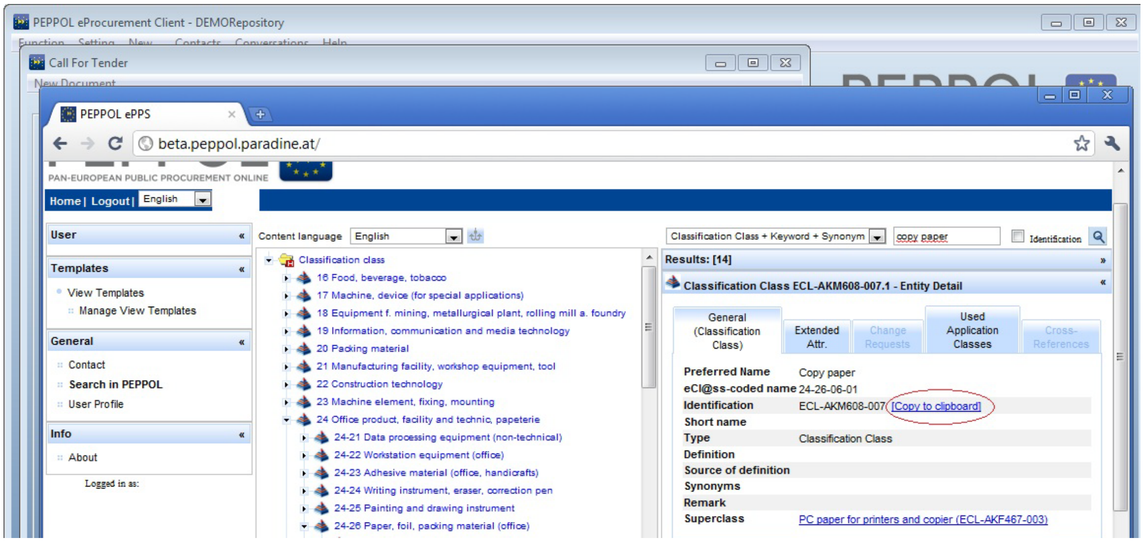

Figure 36: Getting the code from eCl@ss.

8. The site will show you only the ID code to copy. Please, copy and then click on "OK" button.

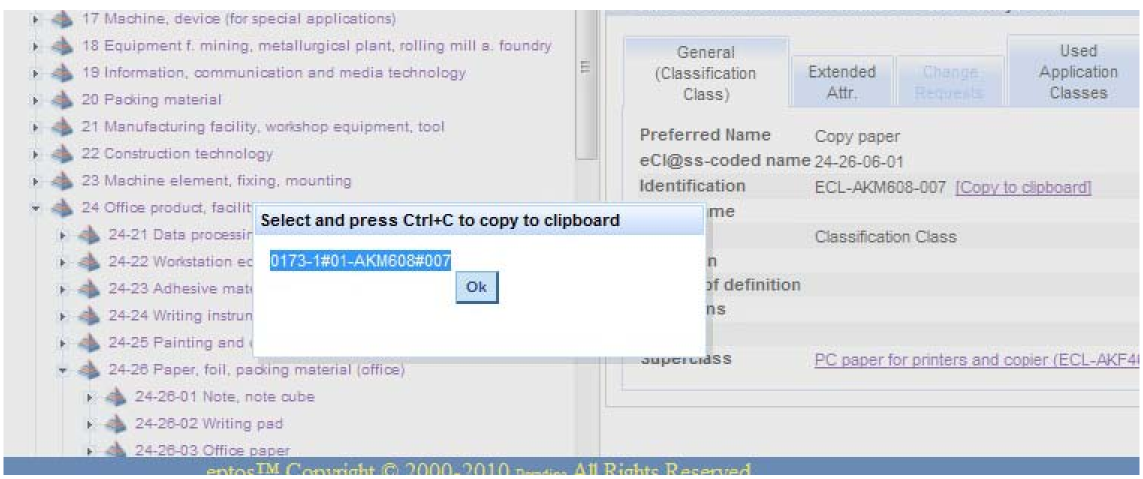

Figure 37: Copy the ID.

9. After copy the ID, please return to the application and click on “Paste from clipboard” link to fill the Class ID field.

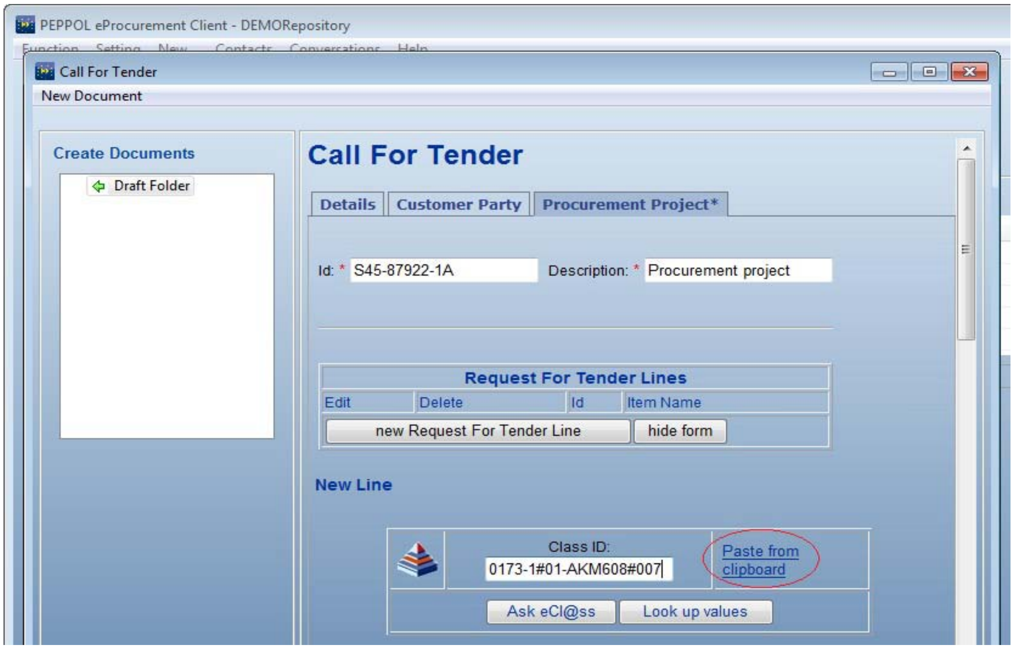

Figure 38: Filling the Class ID.

10. To retrieve data from the web service click on “Look up values” button.

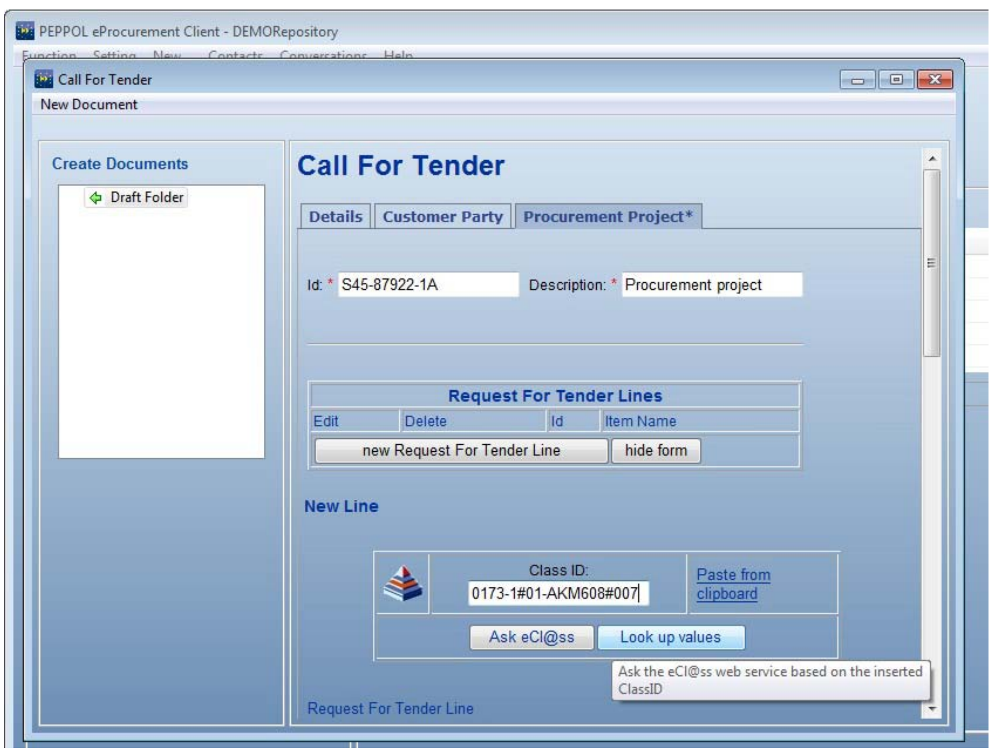

Figure 39: Look up values from eCl@ss.

11. After click on “Look up values” the application could take a few seconds to get the data from the web services, when this request finished you will be able to see a windows message confirm that the search process ended and filled the respective fields into the application.

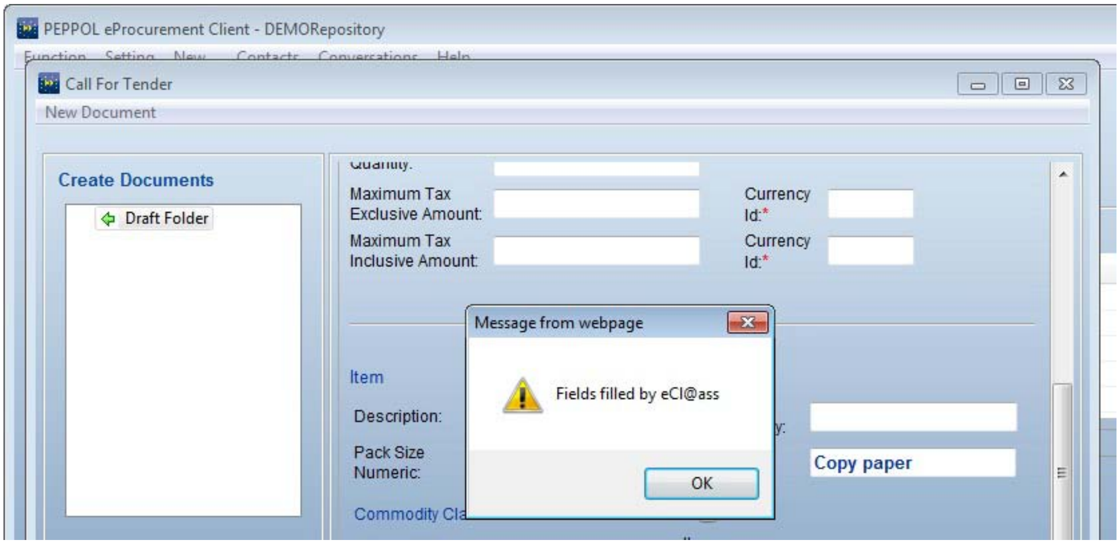

Figure 40: Fields correctly filled by eCl@ss.

12. Finally, you can see the data from web service now in the application.

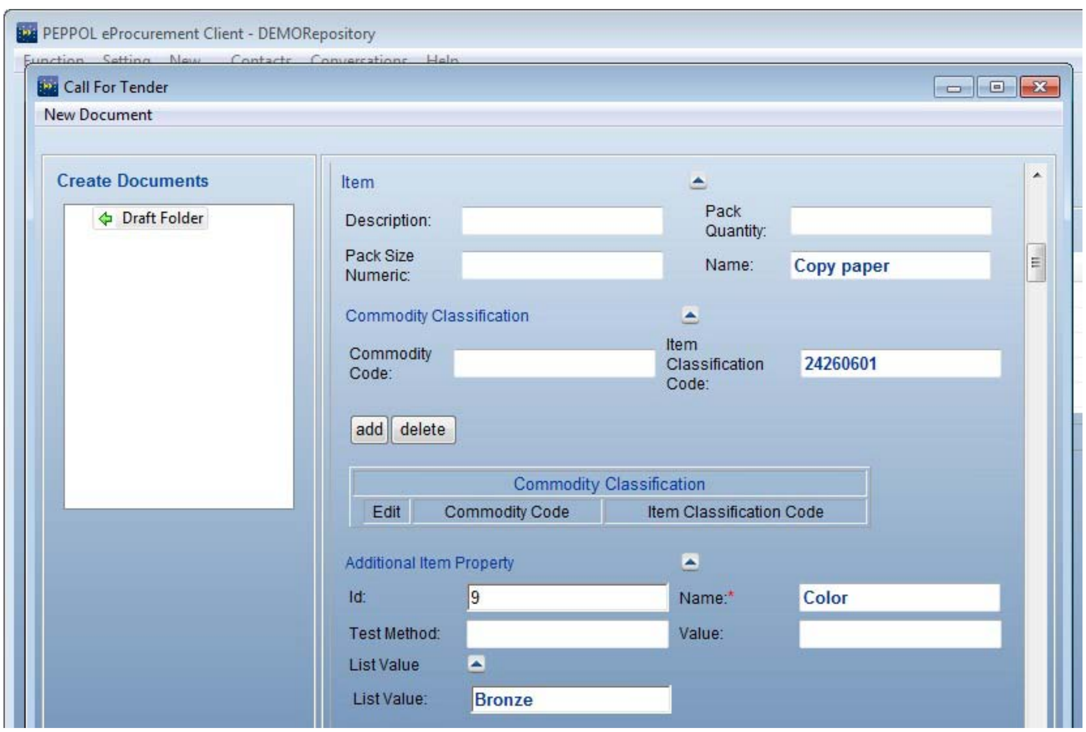

Figure 41: Data showed into the Application.