

1. Workflows

■ Approval	In Discussion
■ Phase	Phase I
■ Responsible Team	ACD IT Internal Audit

▼ A New Project is created in Softone (Installation Service)

The integration starts and the project is created in the Partner Portal.

- It includes the following information:
- Client Code & Client Name
- Name of the Client Account Manager
- Installation Code & Installation Address (Includes Address, Address Details, Post Code, City, Area)
- Project Code (Unique)
- New feature: Installation Type*
- Installation Work Hours
- Project Status
- Period Hours (Assigned Hours)
- Project Start & End Date
- Installation Employees (A,B,C Category) & Installation Telephone number & Installation Responsible Person

! The integration must take into consideration changes in any of the above values and mistakes from users (New, Edit, Delete)

A new project is created in the Partner Portal

▼ Partner Assignment

- AI suggestion of Partner**
- The software suggests some partners based on the following information
- Hourly Rate / Location (Distance) / Areas - cities of coverage (this is for discussion) / Availability (Total hours agreed per year - Programmed hours) / In case of project renewal the previous partner takes precedence.
- Availability based on installation work hours

The ACD user Assigns the Partner (can be partners not in the AI suggestion list)

The partner is notified by email for the new assignment and can login into the portal to accept the assignment

The Partner Accepts the Assignment

The default hourly rate is shown, the partner can change the rate. (notify the Account Coordinator?) locking the rate afterward? logs?

The Account Coordinator is informed of the acceptance and the rate.

The Account Coordinator approves the assignment and rate (project status)

The Partner is reminded that he/she has 5 days to complete the schedule

The Rate is locked and cannot be changed by the Partner

Partner reminder 1 day before the expiration of 5 days. If they don't add the schedule 1 day after the expiration reminder to coordinator to call the partner (notification)

The Partner Rejects the Assignment and adds the reason (drop down field - payment / availability / area / other reason)

The Account Coordinator is informed to add a new Partner

▼ Creating the Schedule per Project

The Partner adds the Schedule

Calendar Features

Calendar View and add visits in the calendar visual (monthly, weekly & daily view)

The partner chooses a day from the calendar and selects the Project to add programs.

When selecting the project they can see Installation working hours, remaining hours (In format 1 hour 24 minutes remaining)

Recurring Schedule

The scheduling must have the following rules:

Within the Start & End Date of the Project

Within the installation working hours

When they are free & no overlap of visits (even for a minute)

Bonus: The ability to cancel overlap features for a specific project

Include / not include weekends and/or holidays per project

Exactly the same duration (total) as assigned hours

Number of visits / spread within the duration of project as much as possible

AI suggestion of schedule

The software suggest some visits based on the rules mentioned in Calendar Features + try to cover earlier open slots first). The partner chooses visit dispersion for the ai suggestion.

For renewals: We could suggest to the partner last years schedule and change if the new dates are on weekends or holidays. This requires that one project is connected the previous one)

In case the partner does not want to use the platform: The Account Manager can create the partner schedule & assignment from their own account

When the program hours (sum of visit duration) is equal to period hours the Partner can Verify the Schedule

The Account Coordinator is informed of the verification. The project status changes



The Program locks for the Partner only. The account coordinator can change the schedule. In order for the partner to change the schedule see workflow Change Request



Project and Visit Data must be sent to Softone / An excel report is exported to automatically add the schedule to the Greek Government Site (SEPE)

▼ Change Request from the Partner

The partner wants to change a visit or multiple visits

The partner makes a request for a Project. Creates the new schedule. Can also add notes / comments for the reason for the change

The Account Coordinator is informed of the request.


The Account Coordinator Approves the request

The Account Coordinator Rejects the Request.

The Program changes to the new schedule


The Account coordinator informs the partner of the reason

The Account coordinator must change the schedule in the SEPE Site.

 The Program remains as it was before the request

When the new schedule has officially changed in the Sepe Site The Account Coordinator must inform the Client

The Partner is informed of the change through the Partner Portal

 Project and Visit Data must be sent to Softone / An excel report is exported to automatically add the schedule to the Greek Government Site (SEPE)

▼ Change Request from Account Coordinator

The Account Coordinator wants the Partner to change a visit or multiple visits from a project


The Account Coordinator makes a request for a Project. Can also add notes / comments for the reason for the change

The Partner is informed of the request

The Partner adds the Schedule

When the program hours (sum of visit duration) is equal to period hours the Partner can Verify the new Schedule

The Account Coordinator is informed of the verification. The project status changes

 The Program locks for the Partner only. The account coordinator can change the schedule. In order for the partner to change the schedule see workflow Change Request



Project and Visit Data must be sent to Softone / An excel report is exported to automatically add the schedule to the Greek Government Site (SEPE)

▼ Approval of Visits & Cost Management

In order for the Partner to get paid, and for quality visits we require that visits are verified. Usually each month with some exceptions. The partners have a block of paper which we call Δελτία Επίσκεψης. For each visit they stamp and sign it as well as the Installation Responsible Person from the clients side. Then there are 3 ways in which they inform us.

1. Using a mobile app (TEKMON - only for Safety Engineers) - They upload a photo of the Δελτιο Επίσκεψης for each visit
2. Email (Usually Doctors) - They scan and send us the Δελτια Επίσκεψης
3. Post - They send us the Δελτία Επίσκεψης via Courier or personally

In addition, they export an excel table from the current portal. They add the rate for each visit and add any additional costs, such as travel expenses, gas etc.

The internal audit approves of the cost, informs the partner and the partner sends us an invoice based on the agreed amount.

▼ Suggested Process Simplified

The Partner Filters the visits for the period that they want to get paid.

Sees a list of visits for that period with the ability to:

Changes the Status of the Visit to Completed or Declined

Add a new hourly rate for each visit separately

Include attachments (specifically the Δελτιο Επίσκεψης - optional for those who don't use TEKMON)

Add any other Costs with attachments

Internal Audit gets notified of the request

The Audit Responsible Approves the request

The Audit Responsible Rejects the Request.

The visits that were approved change to Approved

The Audit Responsible informs the partner of the reason



The Approved Visits lock. No changes can be made unless the approval status is changed by the Audit Responsible.

The Partner is informed of the rejection

New Actions changes are required by the Partner

! Visit Data must be sent to Softone (Attachments of the Δελτία Επίσκεψης Must be sent to Softone in order to connect with the Customer Portal)

▼ Project Renewal

The renewal takes place at Softone. A new project (installation service) is created at softone with a distinct change.

! The partner that was assigned last year takes precedence in the assignment of the project (This is also mentioned in the partner assignment algorithm criteria)

▼ Changing Partner During a project / Cancelling a Project

If a request arises to change a partner the current project is cancelled with the following results:

The Account Coordinator chooses the cancellation date

All visits after the cancelation date are cancelled (Status Ακύρωση) - The timeslots are freed for the partner

The project is cancelled (Must also discuss the process if a project is cancelled by mistake and we want to make it active again)

The Partner is notified of the cancellation

! Cancellation is a process in the ERP. we could keep the process but project and visit data must be sent from ERP to Partner Portal

Technical Features

GDPR Compliance

Role Based Access

MFA for all users

Security in design

Scaling ability

Logs

Version 2 Features

1. Chat with AI which enables partners to schedule and change visits based on the above workflow - the goal is to improve user experience
2. Chat with Account Coordinators & Audit Responsible: The partner can chat directly to GEP employees in order to fasten communication
3. Mobile App - So that users can easily accept, schedule, change and approve visits. Some features might differ (e.g. calendar view)
4. More advance role based access
5. Improved Cost Management System
6. Form building module with some advanced features (Rules / Different forms per service / project / Client)
7. Move the Operations from Softone to Partner Software (This can include Creating Project Group, Creating Projects, Project Renewal)