

esa-match

Training material

Management of ads in the Marketspace and Conversations

Author: Capgemini Italia S.p.A

Approved by: ESA IT Business Change Management

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Objective



- At the end of the course the user will be able to understand how to manage ads in the Marketplace and how to communicate with other entities and ESA.



Intended Users

- Users with ESA Corporate Authentication credentials and an active esa-star account, with an esa-match Responsible or esa-match Conversation Manager role.



- Management of ads in the Marketspace and Conversations
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- The **esa-match Conversation Manager** is the role in charge of entity conversations and message management, together with the esa-match Responsible. The role is:
 - Managed by the esa-match Responsible in esa-match
 - Only assignable to an entity/business unit user registered in esa-star Registration

The esa-match Conversation Manager role has the following rights:

- Managing conversations in the Lounge Area
- Managing the entity's ads and related messages or conversations in the Marketplace
- Replying to ESA communications.

Managing Conversations in the Lounge Area (1/5)

- The Lounge Area is a private virtual room where conversations with other entities can take place. Only users with the role of Conversation Manager or esa-match Responsible can manage conversations in the Lounge Area. These are the only roles notified when their entity is invited to participate in a conversation and they are able to accept or decline the invitation
- If you have one of these two roles, clicking on “My Lounge Area” on the Entity Profile
- Homepage enable you to:
 - Access the list of conversations you are involved in
 - See the Title, Number of Replies, Number of Views, Status, Originating Entity and Last Post details for each conversation
 - Access the conversation contents
 - Sort and filter the list.

Managing conversations in the Lounge Area (2/5)



➤ Click on the checklist icon in the top-right corner to access the Invitations section. Here you can see invitations to conversations from other entities in the Lounge Area. Two lists are visible:

■ Pending Invitations: contains all the invitations from other entities requesting you to join a conversation. Click on the “Accept” button to join the conversation, or on “Reject” if you do not wish to take part

■ Rejected Invitations: contains all the invitations in the last twelve months that your entity has rejected.

The screenshot shows the ESA Lounge Area interface. At the top, there is a header with the ESA logo and navigation options. Below the header, the 'Lounge Area' section is visible, with a sub-section for 'Conversation in which I'm an active member'. The main content area is divided into two sections: 'Pending Invitations' and 'Rejected Invitations'. The 'Pending Invitations' section contains a table with columns for Title, Description, Status, Date, Originator, and Action. The 'Rejected Invitations' section also contains a table with similar columns. A red arrow points to a checklist icon in the top right corner, and a green arrow points to the 'Rejected Invitations' section.

Title	Description	Status	Date	Originator	Action
Cap Communication	asdasdadasd	Pending	24/06/2020	1000033634 8000038670 test POEntityNewRegistration	ACCEPT REJECT
TEST 129.02	d	Pending	07/07/2020	1000033634 8000038670 test POEntityNewRegistration	ACCEPT REJECT

Title	Description	Status	Date	Originator
TEST 128.4	Test KM	Rejected	23/06/2020	1000033634 8000038670 test POEntityNewRegistration
TEST 128.4	Test KM	Rejected	24/06/2020	1000033634 8000038670 test POEntityNewRegistration



Managing conversations in the Lounge Area (3/5)

- Click on the speech-bubble icon in the top-right corner to access the section containing the full list of conversations involving your entity
- Click on the “🔍” lens icon to search under title, description, content or entities who accepted the invitation (free text)
- Click on the “+” icon to start a new conversation. Invited entities will have a new item in their Pending Invitations list. They will need to accept or reject the invite.

Start New Conversation

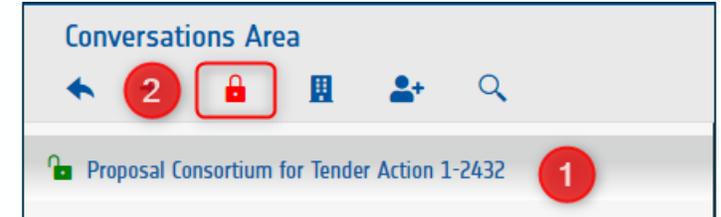
Title

Description

Select Entities:

Managing conversations in the Lounge Area (4/5)

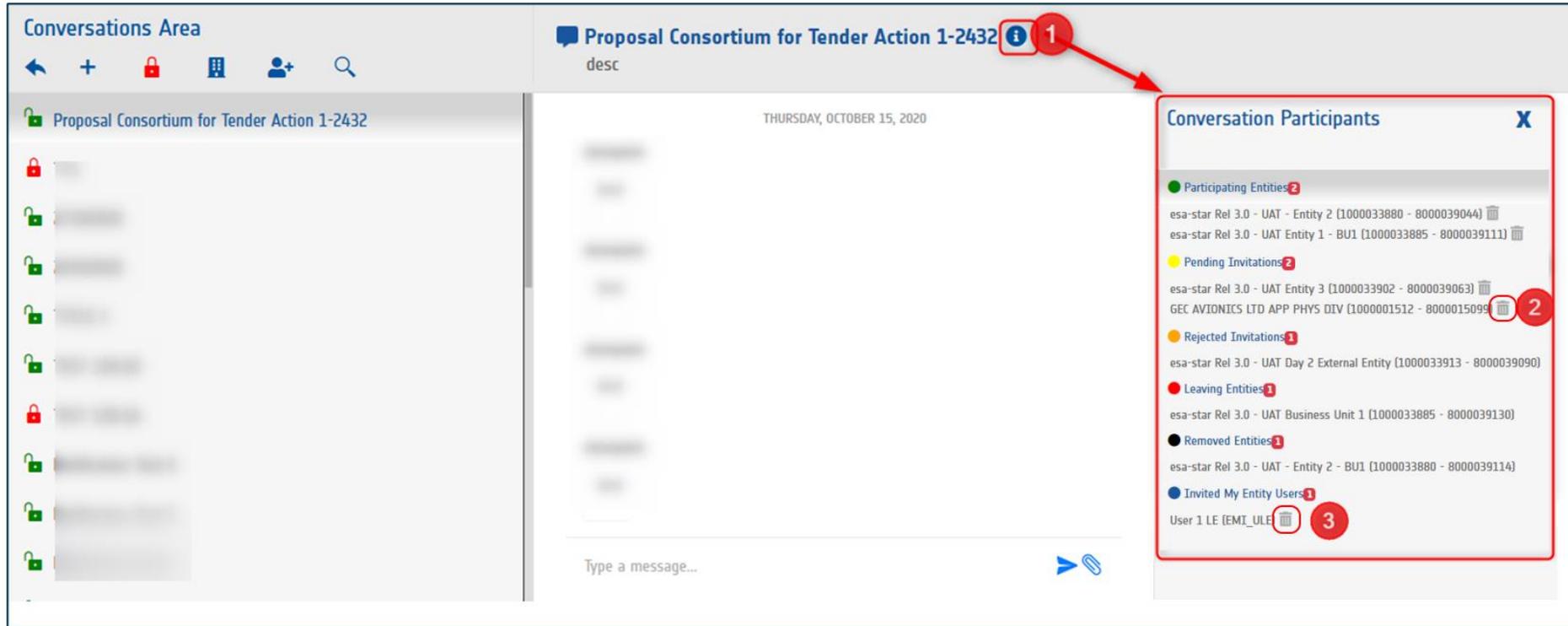
- The Padlock icon indicates if a conversation is ongoing (green) or closed (red) by the originating entity
 - You can close a conversation at any time. Select the conversation (1) and click on the red padlock in the top menu (2). The other participating entities are still able to see the conversation but can no longer send messages
 - You can reopen a closed conversation at any time. Select the conversation (1) and click on the green padlock in the top menu (2)
- You can add entities to a conversation. Select the conversation (1) and then click on the Building icon (2)
- You can invite users belonging to your entity to join the conversation, provided they have a valid role in esa-star Registration. Select the conversation (1) and then click on the Add People icon (2). The system only shows you users with a valid role.



Managing conversations in the Lounge Area (5/5)



- Click on the “i” icon near the conversation title (1) to access the Conversation Participants subsection. A panel on the right will appear showing the Participating Entities, Pending and Rejected Invitations, Leaving and Removed Entities and invited users from your entity
- In the Participating Entities and Pending Invitations lists, you can remove one or more entities at any time (2). You can also remove invited users belonging to your entity (3). If you remove an entity from the pending invitation list, all esa-match Responsibles and Conversation Managers in the removed entity will be notified.



Managing Entity Ads

- The Marketplace is a section when you can create and publish ads in order to:
 - Specify needs and/or offers when looking for new partners
 - Advertise your entity's products and services in order to find new collaborations
- Click on "My Entity ads" on the Entity Profile homepage to access and manage the ads published by your entity. You can create new ads, or edit, publish and delete existing ads.

Marketplace - My Ads

Marketplace Conversation Area

Create Ad

Go Back

Filters

Results : 20 items found

Export in Excel

Category Z-A 10

Category	Icon	Ad Title	Entity Name	Entity Code	Business Unit Code	Status	Publication Date	Expiration Date
other		My Review Ad My ad abstract	test POEntityNewRegistration	1000033634	8000038670	Published	08/10/2020	28/09/2021
SME		test test	test POEntityNewRegistration	1000033634	8000038670	Expired	30/10/2020	

Edit and Delete Ad

NO LOGO

PO Entity 2

Entity Information

Entity Code: 1000033783
Business Unit Code: 8000038887
SME Status: No
LSI: No
Nationality: IT-Italy

Financial Information

Employee Headcount: N/A
Total Assets: N/A
Total Turnover: N/A

Address

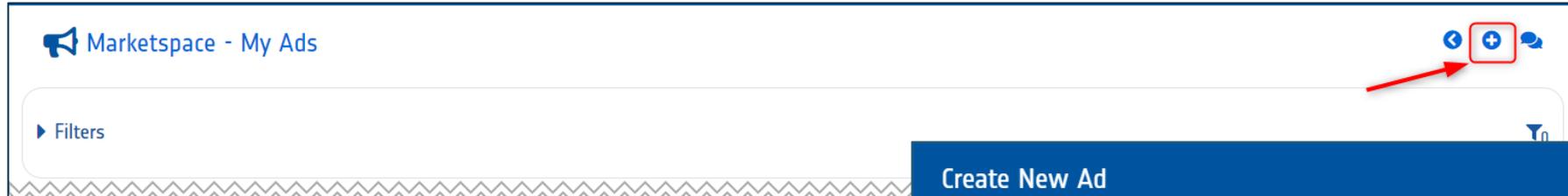
via della pace
00170, rome
IT-Italy

My Lounge Area

My Entity Ads

Managing Entity Ads: Creating and Publishing an Ad

- Click on the “+” icon in the top-right corner to create a new ad.



- In addition to adding basic information, you can:

- Upload a logo for the ad
- Define the type and nationality of the target entities
- Define the expiration date of the ad. Once expired, the ad will no longer be visible to other entities
- Link the ad to an active tender action in an open competition in esa-star Publication
- Add media (images and videos)
- Click on “SAVE AS DRAFT” to save without publishing, “SAVE AND PUBLISH” to publish the ad, or “CLOSE” to discard the draft.

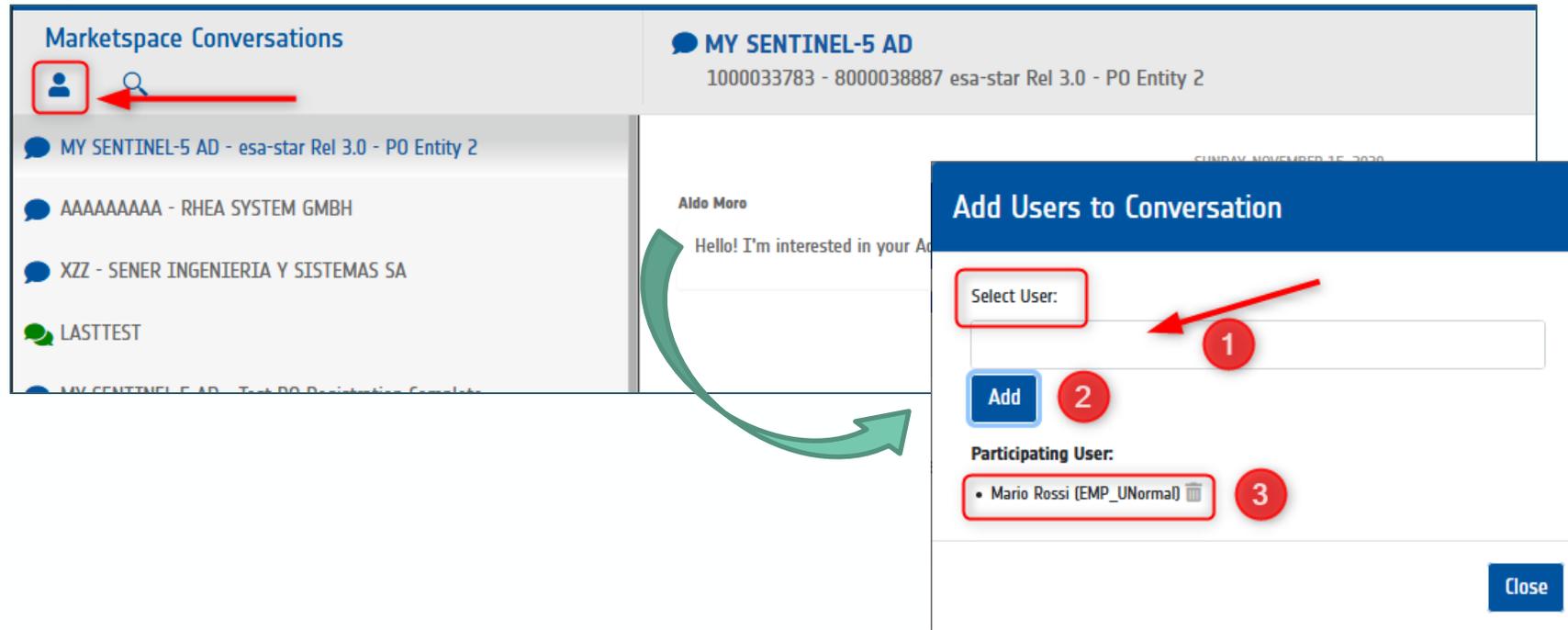
Managing Entity Ads: Managing Conversations (1/2)

➤ For published ads, you can contact the entity owner of the ad by clicking on the “Contact Entity” button in the ad details section. Other users granted access to your ads can contact you in the same way. In both cases, a new conversation is created in the Conversation Area of the Marketplace with the name of the ad title and the reference of the entity initiating the conversation.

- This area, available only for the involved entities, enables users to manage sent and received messages related to ads. Each entity can communicate privately with another entity
- The conversations started by your entity are marked with a green icon, while those started by other entities are marked in blue.

Managing Entity Ads: Managing Conversations (2/2)

- Click on the “” Invite Users icon in the Marketplace Conversations Area to add users belonging to your entity to the selected conversation. The users must have an esa-match Responsible or Conversation Manager role
- In the pop-up that appears, click in the “Select User” field and choose the required user from the drop-down list that appears (1). Click on “add” to confirm your choice (2). The user will be added under the “Participating User” list (3) and notified accordingly
- In the same section you can remove participating users by clicking on the bin icon next to their name. Removed users will also be notified.



Replying to ESA Communications

- ESA can exchange messages with an entity by starting a dedicated conversation
- When ESA starts a conversation or sends a communication to your entity, all esa-match Responsibles and Conversation Managers are notified. You can access the conversation by clicking on your profile icon (1) and selecting the “Communications with ESA” option (2)
- This type of communication can only be started and closed by ESA

➤ You can reply by selecting the communication from the list in the left panel provided it is in open status, as indicated by the unlocked green padlock. Closed communications have a locked red padlock.

The screenshot illustrates the user interface for replying to ESA communications. It is divided into three main sections:

- Left Panel (User Profile):** Contains navigation options like 'My Entity Profile', 'esa-match Directory', 'Marketplace', 'Tenders', and 'Match Area'. A red box labeled '1' highlights the profile icon, and a red box labeled '2' highlights the 'Communications with ESA' option in the 'aldo more' menu.
- Communications List:** A search bar is labeled 'Search Area'. Below it, a list of communications is shown, with 'new communication 2' selected. A red box around this list is labeled 'Communications List'. The title of the selected communication, 'new communication 2', is shown at the top of the right panel and is labeled 'Title of Selected Communication'.
- Message Writing Area:** The bottom section contains a text input field labeled 'Message Writing Area' with the placeholder 'Type a message...'. A blue button with a paper plane icon is labeled 'Button to send Message'.

To Recap

- What has been learned:
 - How to manage conversations in the Lounge Area
 - How to manage entity ads and conversations in the Marketplace
 - How to reply to ESA communications.