

## Account Manual

To support the Users of the Centre for Defence Enterprise Portal  
to establish and maintain an on-line account with MOD.



Prepared for

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## DOCUMENT INFORMATION

### ***VERSION CONTROL***

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## INTRODUCTION

1. This Account Manual supports users of [innovative.ideas.mod.uk](http://innovative.ideas.mod.uk) who have innovative ideas and wish to submit one or more proposals to MOD.
2. This Account Manual has been written based on the assumption that the reader has used the [Defence Suppliers Research Information Portal](#) to access and understand the Centre for Defence Enterprise's role in providing support to the Defence supply network. Relevant information can be found by following the links below. In particular d. ("How do I submit an idea?") is directly relevant to this document.
  - a. [Should I work with MOD?](#) Enterprise and investment.
  - b. [How do I work with MOD?](#) Developing a proposal.
  - c. [What are the terms of business?](#) Commercial basis.
  - d. [How do I submit an idea?](#) On-line account with MOD.
3. Readers who have not yet set up an account should go to the [Opening an Account](#) section in this document.
4. This Account Manual makes reference to other manuals that are located on [innovative.ideas.mod.uk](http://innovative.ideas.mod.uk) and these are:
  - a. **Proposal Manual.** This explains how opportunities are captured, converted to Proposal documents and submitted to MOD. Post submission on-line feedback is also described.
  - b. **User's manual.** This explains how individual users maintain secure access to the account and how support is offered to individuals when using the portal.
5. The instructions in this Account Manual are relevant to Single-user enterprise accounts and Multiple-user enterprise accounts.

<p>science   innovation   technology</p> <p><a href="https://innovative.ideas.mod.uk">Innovative.ideas.mod.uk</a></p>	<p>Establishing &amp; Maintaining an on-line account with MOD.</p>	
<p><b>Account Manual</b></p>		

## OPENING AN ACCOUNT

6. An on-line account is the means by which Opportunities are developed, Proposals are submitted to the MOD and Account holders track the status of submitted Proposals as they progress through the assessment process.
7. Accounts can be registered on the Defence Enterprise Portal which can be found at <https://innovative.ideas.mod.uk> . There are two type of account available. These are the Single-user account and the Multiple-user account.
8. To find out which type of account is most suitable please see the [Single-user or Multiple-user?](#) Section of this manual.
9. To open specific types of account please see the [Account Registration](#) section of this manual.

### ***SINGLE-USER OR MULTIPLE-USER ACCOUNT?***

#### Single-user Account Option

10. There are three main reasons to select a Single-user account option
  - a. You have an email address which is supplied by a commercial email service provider and you do not own the domain name. For example “.....@googlemail.com”.
  - b. You own your own domain name and you do not wish to collaborate with other users of your domain to develop, submit and track proposals with MOD.
  - c. You have access to an employer’s domain name and the employer has agreed to individual employees using the employer’s domain name and resources to develop, submit and track proposals with MOD.
11. The steps required to register for a Single-user account are shown in the [Single-user Registration](#) section of this manual.

#### Multiple-user Account Option

12. There are two main reasons to select a Multiple-user account option
  - a. You are the legal authority for a domain name owned by an Enterprise and you wish to establish an account within which invited employees can collaborate to develop, submit and track proposals with MOD. The structure of the account will be determined by nominated members of your Enterprise. Please see the [Structuring A Multiple-user Account](#) section in this manual.
  - b. You are the legal authority for a domain name owned by an Enterprise and you do not wish employees to use the Enterprise’s domain name in the Single-user mode. Please see the [Single-user Account Option](#) section in this manual.
13. The steps required to register for a Multiple-user account are shown in the [Multiple-user Registration](#) section of this manual.
14. The steps required to register as an Invited-user for a Multiple-user account are shown in the [Invited-user Registration](#) section of this manual.

### ***ACCOUNT REGISTRATION***

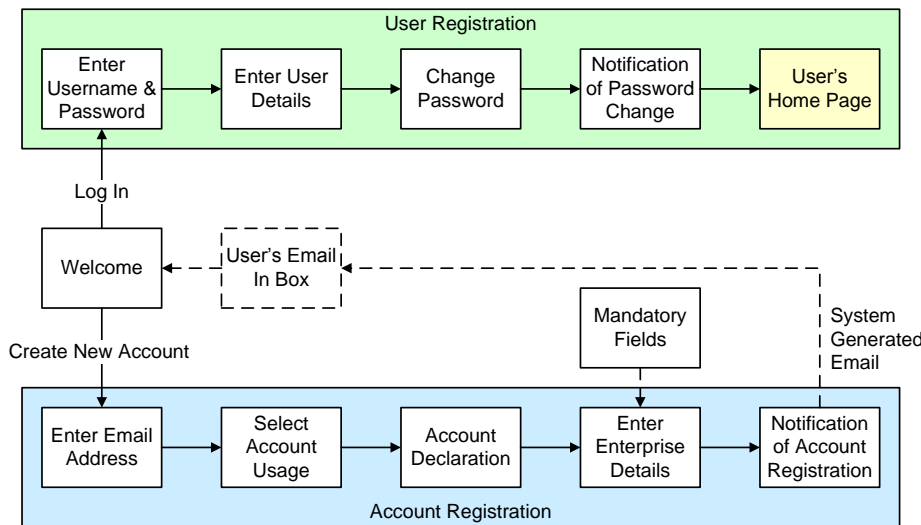
15. This section contains the three possible registration routes available to a User of the Centre for Defence Enterprise Portal.



# Account Manual

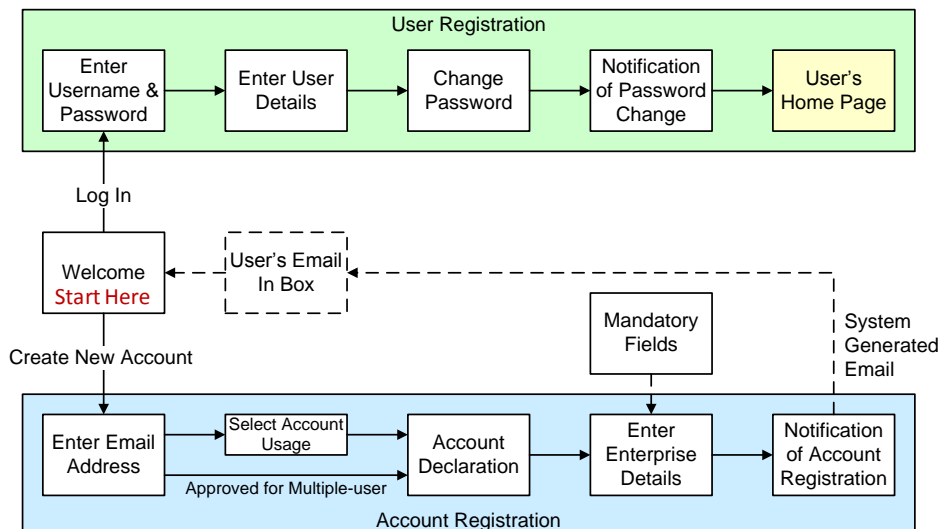
## Single-user Registration

16. A Single-user account registration flow chart has been produced to guide Single-users through the steps required to establish a Single-user account and to register as a user. The Single-user Account Registration Flowchart can be found on the Defence Supplier Research Innovation Portal on the [How do I submit an idea?](#) Page.
17. The Single-user Account Registration Flowchart available on the Defence Supplier Research Innovation Portal is animated and guides the User through the User Interface forms that appear at each stage. An unanimated version is included here.



## Multiple-user Registration

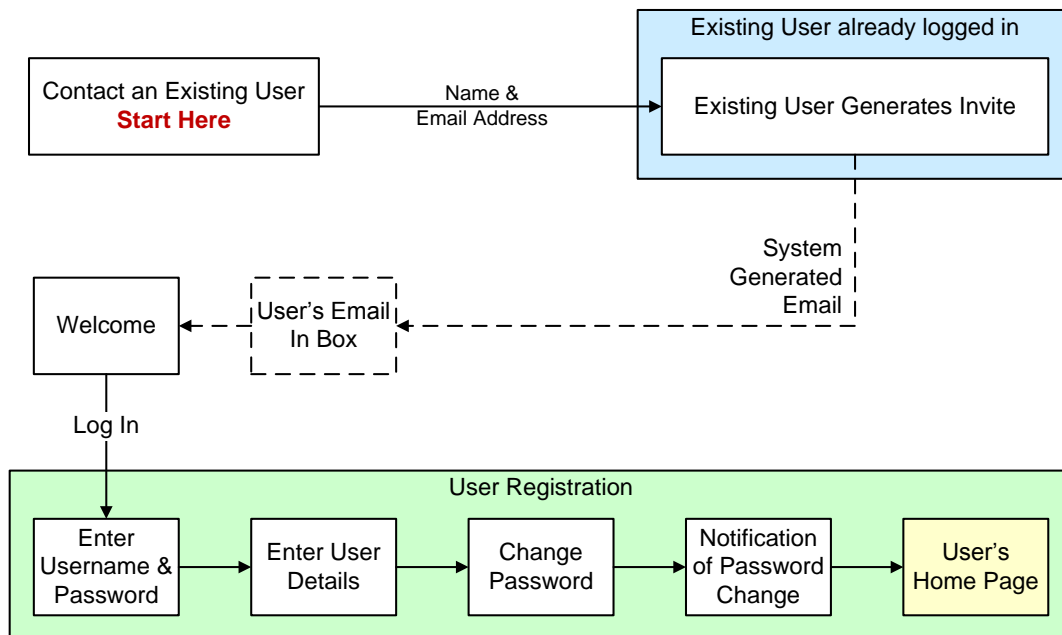
18. A Multiple-user account registration flow chart has been produced to guide an Enterprise Authority through the steps required to establish a Multiple-user account and to register as a user. The Multiple-user Account Registration Flowchart can be found on the Defence Supplier Research Innovation Portal on the [How do I submit an idea?](#) Page.
19. The Multiple-user Account Registration Flowchart available on the Defence Supplier Research Innovation Portal is animated and guides the User through the User Interface forms that appear at each stage. An unanimated version is included here.





## Invited-user Registration

20. An Invited-user registration flow chart has been produced to guide invited users through the steps required to register as a user of a Multiple-user Enterprise Account. The Invited-user Registration Flowchart can be found on the Defence Supplier Research Innovation Portal on the [How do I submit an idea?](#) Page.
21. The Invited-user Account Registration Flowchart available on the Defence Supplier Research Innovation Portal is animated and guides the User through the User Interface forms that appear at each stage. An unanimated version is included here.

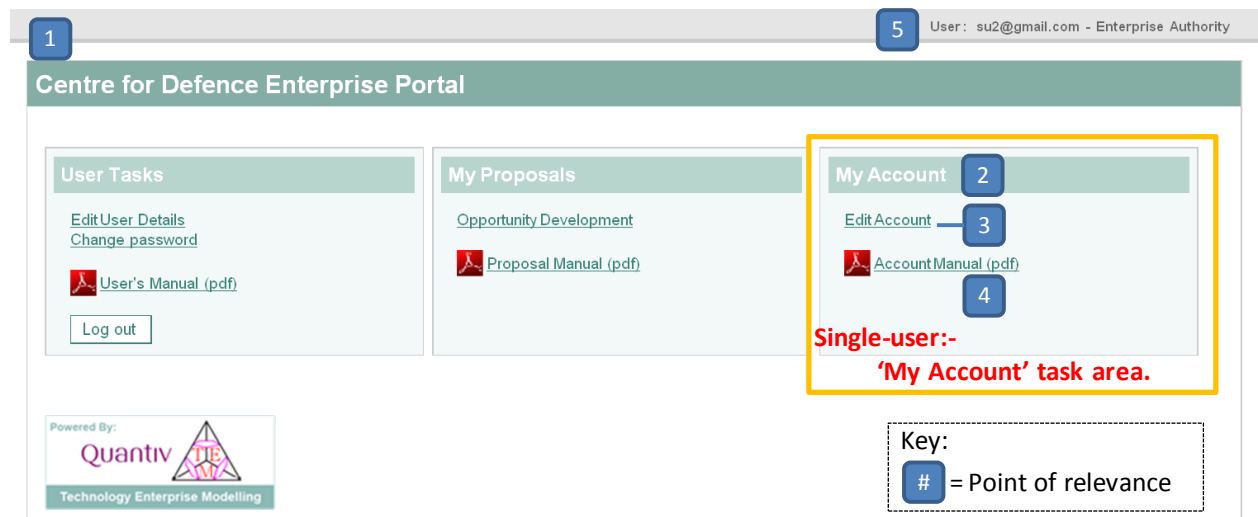


## OPERATING A SINGLE-USER ACCOUNT

22. The Single-user account has very few tasks associated with it. The description of those tasks occupies very little space in this document and everything needed to operate a Single-user Account is contained in this one section.
23. Although a Single-user account is simple to set up and operate, sharing information online from within the account is impossible. A [Multiple-user Account](#) option is available for Users who may wish to build [Opportunity Teams](#) to develop opportunities online.

### MY ACCOUNT TASK AREA

24. 'My Account' is one of three task areas on the User's home page after a successful 'Log In' has been achieved. Information relating to User and Proposal tasks can be found in the User's Manual and Proposal Manual respectively. The 'My Account' task area for a **Single-user account** is shown below...



1

5 User: su2@gmail.com - Enterprise Authority

Centre for Defence Enterprise Portal

User Tasks

Edit User Details  
Change password

User's Manual (pdf)

Log out

My Proposals

Opportunity Development

Proposal Manual (pdf)

My Account 2

Edit Account 3

Account Manual (pdf) 4

Single-user:-  
'My Account' task area.

Powered By:  
Quantiv  
Technology Enterprise Modelling

Key:  
# = Point of relevance

25. Points of relevance for the 'Centre for Defence Enterprise Portal' graphic are:

Point #	Description of Point of Relevance
1	My Defence Enterprise Portal is the name of a User's home page.
2	My Account task area through which the Account is managed.
3	'Edit Account' link opens an <a href="#">Edit Enterprise Details</a> page from which the details that characterise the Enterprise Account can be managed.
4	The document you are reading now can be downloaded from the ' <a href="#">Account Manual (pdf)</a> ' link.
5	The user name and account privileges held are shown here. The Enterprise Authority role in the Single-user Account means that the user is able to access all information and perform all tasks – without delegation.

### EDIT ENTERPRISE DETAILS

26. The details of an enterprise account can be edited by selecting the 'Edit Account' link from the [My Account Task Area](#). The resulting form is shown here...

User: su1@gmail.com - Enterprise Authority

**1** Edit Enterprise Details

Address Line 1	<input type="text" value="House"/>	} <b>2</b>
Address Line 2	<input type="text" value="Street"/>	
Address Line 3	<input type="text" value="Town"/>	
Address Line 4	<input type="text" value="County"/>	
Post Code	<input type="text" value="PC1 1PC"/>	} <b>3</b>
No. of staff engaged in science and engineering	<input type="text" value="1"/>	
Organisation Type	<input type="text" value="SME"/>	
Organisation Size	<input type="text" value="1-10"/>	

**4**
**5**

27. The points of relevance for the 'Edit Enterprise Details' graphic are:-

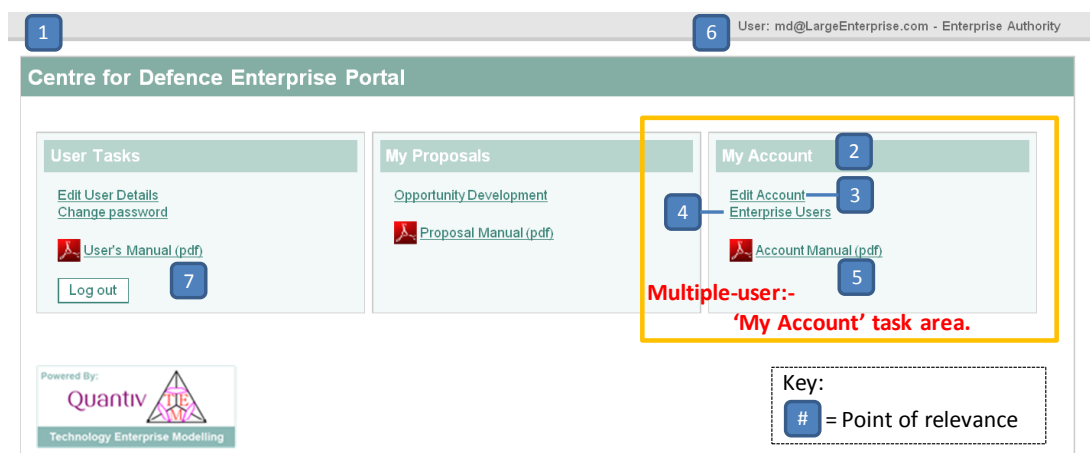
Point #	Description of Point of Relevance
1	The details gathered and presented here are the means by which an Enterprise will be known within MOD. The Enterprise Details are used when every proposal is submitted.
2	This address is the legal registered address of an Enterprise or Individual. It is the 'Head Office' address for all written material in respect of Proposal submissions. Note: Single-user account holders can specify an alternative contact address as described in the User's Manual accessed from the <a href="#">Centre for Defence Enterprise Portal</a> home page.
3	The information about your company supplied here will inform MOD of the nature of your business.
4	Selecting the 'Back' button causes the <a href="#">Centre for Defence Enterprise Portal</a> page to be displayed. Any additions or modifications made will not be saved.
5	Selecting the 'Finish' button causes any additions or modifications made to be saved and the <a href="#">Centre for Defence Enterprise Portal</a> page to be displayed.

## OPERATING A MULTIPLE-USER ACCOUNT

28. The [Multiple-user Account](#) option is available for Users who may wish to build [Opportunity Teams](#) to develop opportunities online. The variety of Enterprises that engage with MOD is extensive and MOD recognises that the way an Enterprise chooses to organise itself confers on the Enterprise certain advantages in the market place.
29. The MOD does not wish to constrain Enterprises in the way they wish to organise themselves so a key aspect of the Multiple-user account is the flexibility in the way it can be configured and used.
30. The flexibility is achieved by introducing some new language relating to the Centre for Defence Enterprise [Account Roles](#) that can be assigned to Users in a Multiple-user account. The remaining sections of this document are dedicated to enabling Enterprises to configure the Multiple-user account to best serve their organisation.

### MY ACCOUNT TASK AREA

31. 'My Account' is one of three task areas on the User's home page after a successful 'Log In' has been achieved. Information relating to User and Proposal tasks can be found in the User's Manual and Proposal Manual respectively. The 'My Account' task area for a **Multiple-user account** is shown below...



1 User: md@LargeEnterprise.com - Enterprise Authority

Centre for Defence Enterprise Portal

User Tasks: Edit User Details, Change password, User's Manual (pdf), Log out (7)

My Proposals: Opportunity Development, Proposal Manual (pdf)

My Account (2): Edit Account (3), Enterprise Users (4), Account Manual (pdf) (5)

Multiple-user:- 'My Account' task area.

Powered By: Quantiv Technology Enterprise Modelling

Key: # = Point of relevance

32. Points of relevance for the 'Centre for Defence Enterprise Portal' graphic are:

Point #	Description of Point of Relevance
1	My Defence Enterprise Portal is the name of a User's home page.
2	My Account task area through which the Account is managed.
3	The 'Edit Account' link opens an <a href="#">Edit Enterprise Details</a> page from which the details that characterise the Enterprise Account can be managed. This view is only available to the Enterprise Authority and Enterprise Proxy roles – see the <a href="#">Account Roles – Overview</a> section in this document.
4	The 'Enterprise Users' link opens an <a href="#">Enterprise Account Personnel View</a> within which user details may be viewed, and dependent on privileges, edited or deleted.
5	The document you are reading now can be downloaded from the 'Account Manual (pdf)' link.
6	The user name and account role held are shown here. For a fuller description of account roles see the <a href="#">Account Roles – Overview</a> section in this document.
7	The User's Manual contains details on how a User can set an additional, associated, contact address.

### EDIT ENTERPRISE DETAILS

33. The details of an enterprise account can be edited by selecting the 'Edit Account' link from the [My Account Task Area](#). The resulting form is shown here...

User: md@LargeEnterprise.com - Enterprise Authority

**Edit Enterprise Details**

Address Line 1	<input type="text" value="Office"/>	}	<b>2</b>
Address Line 2	<input type="text" value="Business Park"/>		
Address Line 3	<input type="text" value="City"/>		
Address Line 4	<input type="text" value="County"/>		
Post Code	<input type="text" value="QW 1 1WQ"/>		
No. of staff engaged in science and engineering	<input type="text" value="1200"/>	}	<b>3</b>
Organisation Type	<input type="text" value="Private Sector Research Establishment"/>		
Organisation Size	<input type="text" value="&gt;500"/>		
<input type="button" value="4 &lt; Back"/> <input type="button" value="5 Finish"/>			

34. The points of relevance for the 'Edit Enterprise Details' graphic are:-

Point #	Description of Point of Relevance
1	The Enterprise Details are used when every proposal is submitted. The details gathered and presented here are the means by which an Enterprise will be known within MOD.
2	This address is the legal registered address of an Enterprise or Individual. It is the 'Head Office' address for all written material in respect of Proposal submissions. Note: Individual Users of Multiple-user accounts can specify an alternative contact address as described in the User's Manual accessed from the <a href="#">Centre for Defence Enterprise Portal</a> home page.
3	The information about your company supplied here will inform MOD of the nature of your business.
4	Selecting the 'Back' button causes the <a href="#">Centre for Defence Enterprise Portal</a> page to be displayed. Any additions or modifications made will not be saved.
5	Selecting the 'Finish' button causes any additions or modifications made to be saved and the <a href="#">Centre for Defence Enterprise Portal</a> page to be displayed.

### ENTERPRISE ACCOUNT PERSONNEL

35. The 'Enterprise Account Personnel' view is reached by selecting the 'Enterprise Users' link from the [My Account Task Area](#) on the [Centre for Defence Enterprise Portal](#) home page and **is only visible in Multiple-user accounts.**

36. The administration of the Enterprise Account is undertaken from this view. Only those users with appropriate privileges can access the account administration functions.

## Enterprise Account Personnel View

37. The initial view of the 'Enterprise Account Personnel' will show the Enterprise Authority only. A more populated view is shown in the Enterprise Account Administration section in this document.

1 User: md@LargeEnterprise.com - Enterprise Authority

**Enterprise Account Personnel**

2   3

User Ref	Name	Email Address	Telephone	Portal Role	Details
EU1004	Managing Director	md@LargeEnterprise.com	0123456789	Enterprise Authority	<a href="#">Details</a>

4      5      6      7      8      9

38. The points of relevance for the Enterprise Account Personnel graphic are:-

Point #	Description of Point of Relevance
1	The current user's email address and <a href="#">Account Role</a> are always displayed here.
2	Selecting the 'Invite New User' button opens up the <a href="#">Invite User</a> form.
3	Selecting the 'Close' button returns the user to the <a href="#">Centre for Defence Enterprise Portal</a> home page.
4	The [User Ref] column indicates the <b>unique</b> reference number that was system generated when the user was invited or registered. The User's name, email address, portal roles, opportunities and proposals are associated with the [User Ref] number by the system and can all be changed by user's with appropriate privileges to perform the necessary tasks.
5	The [Name] column indicates the name that was entered by a User during invitation, registration or editing of details. See the <a href="#">View / Edit Details</a> section in this document for more information about user details.
6	The [Email Address] column indicates the email address for correspondence between the <a href="#">Centre for Defence Enterprise</a> and the User. The email domain name ('@largeenterprise.com' in this example) will be the same for ALL users of a given Multiple-user account and was fixed when the Enterprise Account was established by the Enterprise Authority. The User specific name ('md' in this example) must be a valid username on the Enterprise's domain.
7	The [Telephone] column indicates the contact telephone number that was entered by a User during invitation, registration or editing of details. See the <a href="#">View / Edit Details</a> section in this document for more information about user details.
8	The [Portal Role] column indicates the Account Role currently held by the user shown in the [User Ref] column. See the <a href="#">Account Role</a> and <a href="#">Invite User</a> sections in this document for more information about roles.
9	The [Details] column indicates the View /Edit Details and Delete User account tasks available to a given user. See the <a href="#">Enterprise Account Administration</a> section in this document for a fuller description.

## Enterprise Account Administration

39. This section is primarily aimed at those users with Enterprise Authority and Enterprise Proxy privileges and describes how to access, interpret and edit the information presented in the Enterprise Account Personnel View.
40. Those users without Enterprise Authority or Enterprise Proxy privileges will be able to view any user's details but will only be able to edit a subset of their own details.

1 User: md@LargeEnterprise.com - Enterprise Authority

**Enterprise Account Personnel**

2 

3

User Ref	Name	Email Address	Telephone	Portal Role	Details
EU1024	First Actor	a1@LargeEnterprise.com		Proposal Observer	<a href="#">Details</a> <a href="#">Delete</a>
EU1027	Second Actor	a2@LargeEnterprise.com		Opportunity Manager	<a href="#">Details</a> <a href="#">Delete</a>
EU1004	Managing Director	md@LargeEnterprise.com	0123456789	Enterprise Authority	<a href="#">Details</a> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">4</span>
EU1006	Northern Director	nd@LargeEnterprise.com	0234567891	Enterprise Proxy	<a href="#">Details</a> <a href="#">Delete</a>
EU1007	Southern Director	sd@LargeEnterprise.com	0345678912	Enterprise Proxy	<a href="#">Details</a> <a href="#">Delete</a>
EU1008	Eastern Director	ed@LargeEnterprise.com	0456789123	Enterprise Proxy	<a href="#">Details</a> <a href="#">Delete</a> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">5</span>
EU1009	Western Director	wd@LargeEnterprise.com	0567891234	Enterprise Proxy	<a href="#">Details</a> <a href="#">Delete</a>
EU1017	Technical Director	td@LargeEnterprise.com	0678912345	Enterprise Observer	<a href="#">Delete</a>
EU1018	Sales & Marketing Director	sam@LargeEnterprise.com	0789123456	Enterprise Observer	<a href="#">Delete</a>
EU1019	Financial Director	fd@LargeEnterprise.com	0891234567	Enterprise Observer	<a href="#">Details</a> <a href="#">Delete</a>
EU1020	First Northern Manager	nm1@LargeEnterprise.com		Proposal Champion	<a href="#">Details</a> <a href="#">Delete</a>
EU1021	Second Northern Manager	nm2@LargeEnterprise.com		Proposal Champion	<a href="#">Delete</a>
EU1023	Third Northern Manager	nm3@LargeEnterprise.com		Opportunity Manager	<a href="#">Delete</a>
EU1040	South Western	sw@LargeEnterprise.com		Enterprise Proxy	<a href="#">Delete</a> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">6</span>

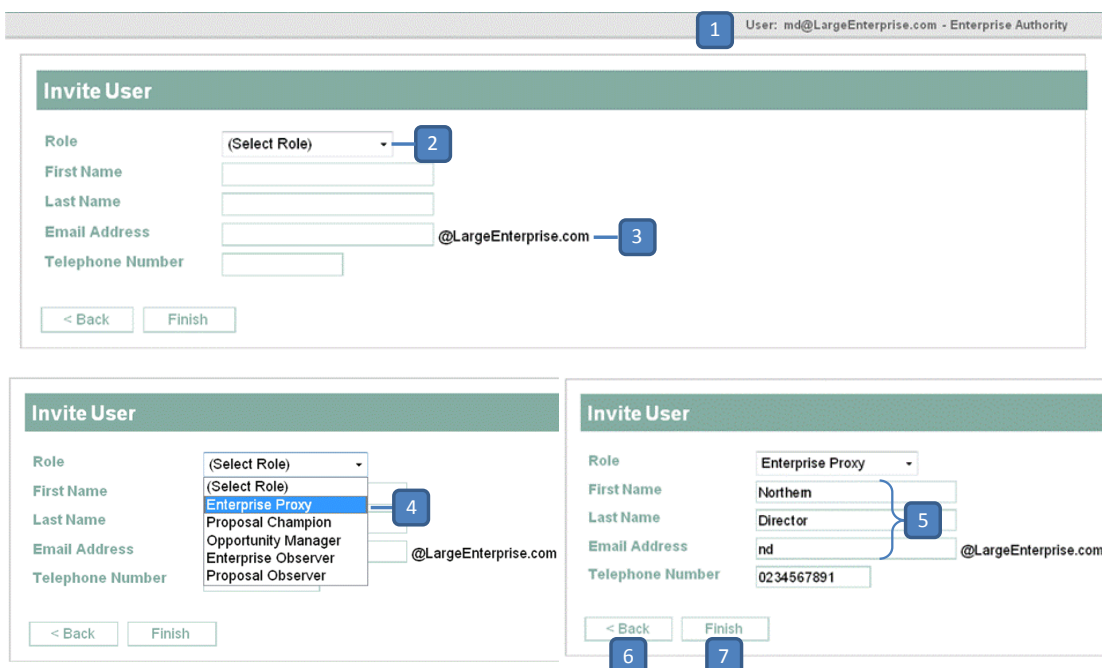
41. The points of relevance for the Enterprise Account Personnel graphic are:-

Point #	Description of Point of Relevance
1	'Enterprise Account Administration' can only be undertaken by users with <a href="#">Enterprise Authority</a> or <a href="#">Enterprise Proxy</a> roles. Users with other roles will only be able to view details and possibly invite new users.
2	Selecting the 'Invite New User' button opens up the <a href="#">Invite User</a> form.
3	Selecting the 'Close' button returns the user to the <a href="#">Centre for Defence Enterprise Portal</a> home page.
4	Selecting the ' <a href="#">Details</a> ' link opens the 'User Details' form in <a href="#">View /Edit</a> mode dependent upon the Role of the current user – see Point # 1.
5	When the ' <a href="#">Details</a> ' and ' <a href="#">Delete</a> ' links are available against a [User Ref] row selecting ' <a href="#">Details</a> ' will open up the <a href="#">Edit User Details</a> form and selecting ' <a href="#">Delete</a> ' will open up <a href="#">Delete User</a> dialogue box options.
6	When only the ' <a href="#">Delete</a> ' link is available against a [User Ref] row this means that a User has been invited BUT has not yet registered. If the ' <a href="#">Delete</a> ' link is selected a <a href="#">Delete Confirmation</a> dialogue box appears.

## ACCOUNT ADMINISTRATION FUNCTIONS

### Invite User

42. New users are invited to open an account by selecting the 'Invite New User' button on the [Enterprise Account Personnel](#) view. The resulting 'Invite User' form is shown here in three stage of completeness...



The figure consists of three sequential screenshots of the 'Invite User' web form, each with a numbered callout (1-7) indicating key features:

- 1:** The top navigation bar showing the user's email address: 'User: md@LargeEnterprise.com - Enterprise Authority'.
- 2:** The 'Role' dropdown menu set to '(Select Role)'.
- 3:** The 'Email Address' field containing '@LargeEnterprise.com'.
- 4:** The 'Role' dropdown menu expanded, showing options: '(Select Role)', 'Enterprise Proxy', 'Proposal Champion', 'Opportunity Manager', 'Enterprise Observer', and 'Proposal Observer'. 'Enterprise Proxy' is highlighted.
- 5:** The form fields filled with example data: Role: Enterprise Proxy, First Name: Northem, Last Name: Director, Email Address: nd@LargeEnterprise.com, Telephone Number: 0234567891.
- 6:** The '< Back' button.
- 7:** The 'Finish' button.

43. The points of relevance for the 'Invite User' graphic are:-

Point #	Description of Point of Relevance
1	Of all the Account Roles it is only Enterprise Observers and Proposal Observers who cannot invite Users to register with the Account.
2	The role of a potential user is selected by operating the 'Select Role' drop down pick list control.
3	The user must have an email account on the Enterprise's domain to enable a new user to register with the Enterprise Account.
4	The Role options that appear in the 'Select Role' drop down pick list control are dependent on the Role of the User who is generating the invitation. See the <a href="#">Account Role Permissions</a> section in this document to ensure appropriate roles are assigned to invitees.
5	These details would be supplied to the User generating the invitation by a member of the Enterprise who may well be the invitee or manager of the invitee.
6	Selecting the 'Back' button cause the User to be returned to the <a href="#">Enterprise Account Personnel View</a> WITHOUT saving any entries.
7	Selecting the 'Finish' button cause the entries to be checked for completeness and SAVED. A successful save returns the User to the <a href="#">Enterprise Account Personnel View</a> .

## Delete Users

44. The 'Delete User' dialogue boxes can only be reached by selecting the 'Delete' link on the [Enterprise Account Personnel](#) administration view of an [Enterprise Authority](#) or [Enterprise Proxy](#).
45. If a User who is to be deleted has no [Opportunity Team](#) roles a 'Delete User' confirmation dialogue box is presented as shown....

User: md@LargeEnterprise.com - Enterprise Authority

**Delete User**

Are you sure you want to delete this user? 1

2
3

**When a User has NO Opportunity team role**

46. A User who IS assigned to an Opportunity Team CANNOT be deleted and a 'Delete User' dialogue box is presented which gives further information as shown.....

User: md@LargeEnterprise.com - Enterprise Authority

**Delete User**

Unable to delete user. User permissions must be removed for the following opportunities/proposals:- 4

CDE10008 5

6

**When a User IS PERFORMING an Opportunity team role**

47. The points of relevance for the 'Invite User' graphic are:-

Point #	Description of Point of Relevance
1	This dialogue text appears when a 'to be deleted User' has NO <a href="#">Opportunity Team</a> roles.
2	Selecting the 'Yes' button causes the user in question to be permanently deleted and the operator is returned to the <a href="#">Enterprise Account Personnel</a> administration view. No messages are sent to the deleted user. A deleted user can be re-invited and would need to register.
3	Selecting the 'No' button returns the operator to the <a href="#">Enterprise Account Personnel</a> administration view WITHOUT deleting the user in question.
4	This dialogue text appears when a 'to be deleted User' is assigned to an <a href="#">Opportunity Team</a> . To remove User permissions from <a href="#">Opportunity Teams</a> please see the <a href="#">Opportunity Team User Roles</a> section in this manual.
5	A list of all <a href="#">Opportunity Teams</a> that a user in involved in is shown here. An Enterprise administrator must go through each <a href="#">Opportunity Team</a> in turn and remove the <a href="#">Opportunity Team User Roles</a> of a 'to be deleted' user.
6	Selecting the 'Close' button cause the User to be returned to the <a href="#">Enterprise Account Personnel</a> administration view.

## View / Edit User Details

48. The ability to View and / or Edit User details is dependent upon the Account Role that a user has been granted.
- a. The Account Roles with **View Only** privileges only are
    - i. Enterprise Observer
    - ii. Proposal Champion
    - iii. Opportunity Manager
    - iv. Proposal Observer
  - b. The Account Roles with **Edit** (and therefore View) privileges are
    - i. Enterprise Authority
    - ii. Enterprise Proxy

### View User Details

49. All users can access the details of any other user by selecting the 'Details' link from the [Enterprise Account Personnel View](#).
50. Fields that are **View Only** to a given user are presented with a grey background as shown here...

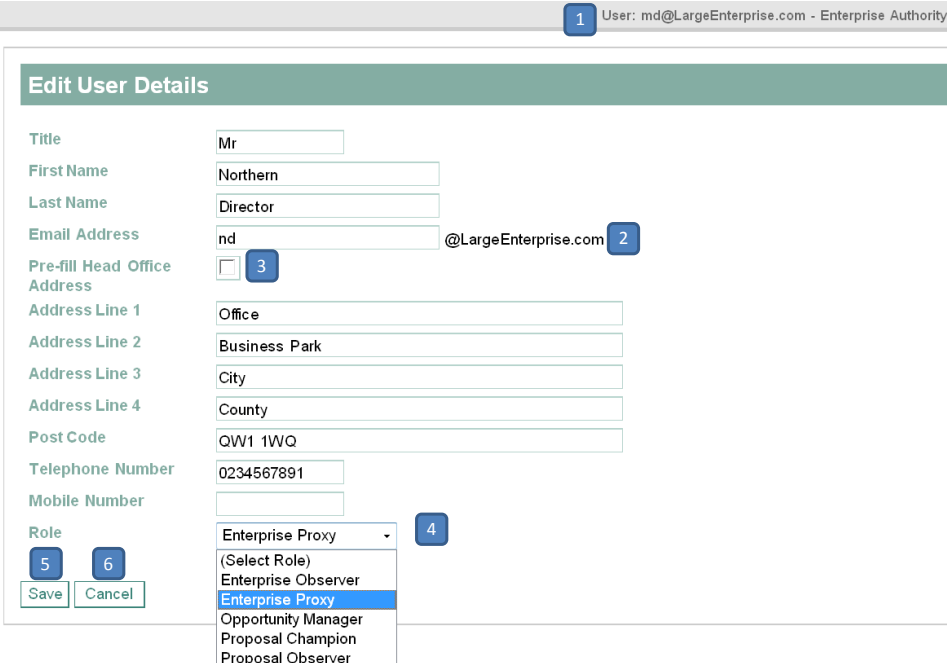
User: nm1@LargeEnt

**View User Details**

<b>Title</b>	<input type="text"/>
<b>First Name</b>	<input type="text" value="First"/>
<b>Last Name</b>	<input type="text" value="Actor"/>
<b>Email Address</b>	<input type="text" value="a1"/> @LargeEnterprise.com
<b>Pre-fill Head Office Address</b>	<input type="checkbox"/>
<b>Address Line 1</b>	<input type="text" value="Office"/>
<b>Address Line 2</b>	<input type="text" value="Business Park"/>
<b>Address Line 3</b>	<input type="text" value="City"/>
<b>Address Line 4</b>	<input type="text" value="County"/>
<b>Post Code</b>	<input type="text" value="QW1 1WQ"/>
<b>Telephone Number</b>	<input type="text"/>
<b>Mobile Number</b>	<input type="text"/>
<b>Role</b>	<input style="border: none; background-color: #ccc;" type="text" value="Proposal Observer"/> ▾

### Edit another User's Details

51. The 'Edit User Details' form can only be reached by selecting the 'Details' link on the [Enterprise Account Personnel](#) administration view of an [Enterprise Authority](#) or [Enterprise Proxy](#) user.

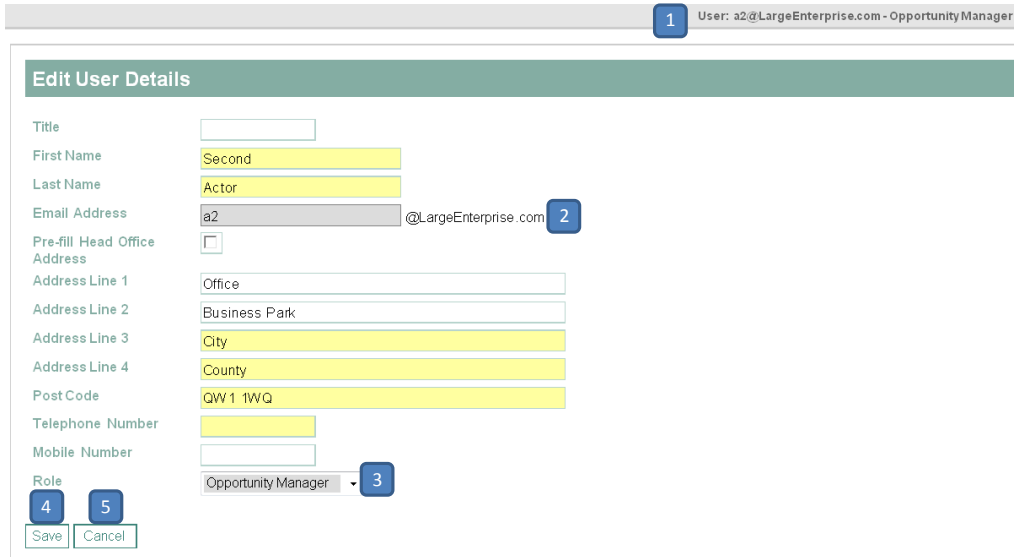


52. The points of relevance for the 'Edit User Details' graphic when editing another User's details are:-

Point #	Description of Point of Relevance
1	A User must have Enterprise Authority or Enterprise Proxy account roles to edit another user's details.
2	The domain name section of the 'Email Address' cannot be altered by any User. However the Username section ('nd' in this example) can be altered.
3	Selecting the 'Pre-fill Head Office Address' check box causes the User's address to be automatically populated with the head office address. Un-checking a checked box causes all address fields to be cleared.
4	The account role privileges for a given user are set by selecting the appropriate role from the 'Role' pull down pick list. Please see the <a href="#">Account Roles – Overview</a> section in this document for a fuller description.
5	Selecting the 'Save' button causes the information in the 'Edit User Details' to be updated and the user is returned to the <a href="#">Enterprise Account Personnel</a> administration view
6	Selecting the 'Cancel' button cause the User to be returned to the <a href="#">Enterprise Account Personnel</a> administration view WITHOUT making any changes to the User's details.


### Editing One's Own Details

53. Users who do not have permission to edit the account of others are able to see and select the 'Details' link on the [Enterprise Account Personnel View](#) adjacent to their own user details in the [Details] column. The appearance of the 'Edit User Details' form then looks like this...



54. The points of relevance for the 'Edit User Details' graphic when editing one's own details are:-

Point #	Description of Point of Relevance
1	'a2' is the user to whom the information presented in the form refers.
2	The domain name section of the 'Email Address' cannot be altered by any User. Nor can a user change the username part of the email address for their own account.
3	The account role privileges for a given user cannot be edited by that User.
4	Selecting the 'Save' button causes the information in the 'Edit User Details' to be updated and the user is returned to the <a href="#">Enterprise Account Personnel View</a>
5	Selecting the 'Cancel' button cause the User to be returned to the <a href="#">Enterprise Account Personnel View</a> WITHOUT making any changes to the User's details.

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<a href="http://Innovative.ideas.mod.uk">Innovative.ideas.mod.uk</a>	<b>Account Manual</b>	

## STRUCTURING A MULTIPLE-USER ACCOUNT

### **ACCOUNT ROLES – OVERVIEW**

55. There are two classes of 'Account Roles' and these are:
- a. **Enterprise Management roles.** These are described more fully later in this section under the heading [Enterprise Management Roles](#) and include the following
    - i. Enterprise Authority (**EA**) – Legally owns the account on behalf of the Enterprise
    - ii. Enterprise Proxy (**EP**) – administers the account on behalf of the **EA**
    - iii. Enterprise Observer (**EO**) – can see all published proposals
  - b. **Proposal Development roles.** These are described more fully later in this section under the heading [Proposal Development Roles](#) and include the following
    - i. Proposal Champion (**PC**) – Creates opportunity and manages proposal submissions to MOD.
    - ii. Opportunity Manager (**OM**) – Enters opportunity information and publishes proposals for internal review.
    - iii. Proposal Observer (**PO**) – Reviews proposal content and contributes information to the **OM** and **PC**.
56. Users are initially invited to hold one of the six Account roles shown above which enable a user to perform various 'Centre for Defence Enterprise Portal' tasks. The [Account Role Permissions](#) associated with each of the roles has been designed to allow the EA and EP's the widest possible freedom to organise the usage of the account to reflect preferred working practices of their Enterprise.


## ACCOUNT ROLE PERMISSIONS

57. Account Role Permissions allow Users to perform portal tasks. The appearance of many portal forms is subtly different for users with different roles. The important aspect being that a given user gets to see the task controls that enable a given role to be performed. The following Account Role Overview table refers:-

0=NO; 1=YES; # = Must be assigned to a specific Opportunity Team role		Account Roles						Point of Relevance
		Enterprise Roles			Proposal Roles			
Centre for Defence Enterprise Portal Tasks		EO	EA	EP	PC	OM	PO	
Enterprise Tasks	Open / Close Enterprise Account	0	1	0	0	0	0	1
	Edit Account Details	0	1	1	0	0	0	2
	Invite Users to Enterprise Roles	0	1	1	0	0	0	3
	Invite Subordinate Users to Proposal Roles	0	1	1	1	1	0	4
	Edit any User's Account details	0	1	1	0	0	0	5
	Edit Own User's Details (Title, Address & Phone)	1	1	1	1	1	1	6
Proposal Tasks	Create Opportunity & alter title details	0	1	1	1	0	0	7
	Assign/Delete Opportunity Team Members	0	1	1	#	#	0	8
	Edit Opportunity content via web forms	0	#	#	#	#	0	9
	Delete an Opportunity	0	#	#	#	#	0	10
	Submit a Proposal	0	#	#	#	0	0	11
	View a Proposal	1	1	1	#	#	#	12

58. The points of relevance for the 'Account Role Permissions' table are:-

Point #	Description of Point of Relevance
1	The account can be opened online but the <a href="#">Enterprise Authority</a> must contact the <a href="#">Centre for Defence Enterprise</a> if the Account needs to be suspended for any reason.
2	The account details are the means by which the Enterprise is known to MOD and therefore only the <a href="#">Enterprise Authority</a> and <a href="#">Enterprise Proxies</a> can change these details.
3	Inviting users to Enterprise positions requires judgement because of the ability to see all proposals and to change the account roles of any user.
4	There is flexibility to allow those assigned to <a href="#">Opportunity Teams</a> to invite enterprise personnel to open an account with subordinate permissions for assignment to <a href="#">Opportunity Teams</a> .
5	<a href="#">Enterprise Authority</a> and <a href="#">Enterprise Proxies</a> can promote or demote the enterprise users as is appropriate for their organisation's needs.
6	Every user can alter their own contact address and telephone number
7	It is important to note that only the <a href="#">Opportunity Team Creator</a> in an <a href="#">Opportunity Team</a> can submit the finished proposal to MOD. Only those Users with <a href="#">Enterprise Authority</a> , <a href="#">Enterprise Proxies</a> , OR <a href="#">Proposal Champion</a> account role holders can be assigned to the <a href="#">Opportunity Team Creator</a> role.
8	The <a href="#">Enterprise Authority</a> and the <a href="#">Enterprise Proxies</a> can change the composition of ANY <a href="#">Opportunity Team</a> . The <a href="#">Proposal Champion</a> and <a href="#">Opportunity Manager</a> can only alter aspects of the <a href="#">Opportunity Teams</a> to which they are assigned.

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	<b>Account Manual</b>	

9	The <a href="#">Enterprise Authority</a> , <a href="#">Enterprise Proxies</a> , <a href="#">Proposal Champion</a> and <a href="#">Opportunity Manager</a> who is assigned to the <a href="#">Opportunity Team Creator</a> role can enter and edit information and publish proposals for internal review. See the Proposal Manual for details.
10	Only the <a href="#">Enterprise Authority</a> , <a href="#">Enterprise Proxies</a> , OR <a href="#">Proposal Champion</a> who is assigned to the <a href="#">Opportunity Team Creator</a> role can delete a proposal. See the Proposal Manual for details.
11	Only the <a href="#">Enterprise Authority</a> , <a href="#">Enterprise Proxies</a> , <a href="#">Proposal Champion</a> OR <a href="#">Opportunity Manager</a> who is assigned to the <a href="#">Opportunity Team Creator</a> role can submit a proposal to MOD. See the Proposal Manual for details.
12	<p><a href="#">Enterprise Authority</a>, <a href="#">Enterprise Proxy</a>, and <a href="#">Enterprise Observer</a> account users can see any Proposal once it has been published with initial 'Draft' or 'Final' draft status by the <a href="#">Opportunity Team Manager</a>.</p> <p><a href="#">Proposal Champion</a>, <a href="#">Opportunity Manager</a> and <a href="#">Proposal Observer</a> account users can ONLY see the Proposals published with initial 'Draft' or 'Final' draft status by the <a href="#">Opportunity Team Manager</a> IF they are assigned to a role in the relevant <a href="#">Opportunity Team</a>.</p> <p>See the Proposal Manual for Access and Publishing details.</p>

## ***ENTERPRISE MANAGEMENT ROLES***

### **The Enterprise Authority (EA)**


59. There is only one Enterprise Authority
60. Has the authority, or delegated authority, to own the account on behalf of the Enterprise.
61. Agrees to the terms and conditions of the account on behalf of the Enterprise
62. Is the only role in 'Single-user' accounts and can see and do everything
63. In 'Multiple-user' accounts the EA can:
  - a. See all published and submitted proposals
  - b. Perform all other roles
  - c. Invite and assign people to all other roles

### **The Enterprise Proxy (EP)**

64. Can be multiple Enterprise Proxies
65. Invited by the Enterprise Authority
66. Administers the account on behalf of the Enterprise Authority (if required)
67. Has identical privileges to the Enterprise Authority

### **The Enterprise Observer (EO)**

68. Can be multiple Enterprise Observers
69. Invited by the Enterprise Authority or Enterprise Proxy
70. Can see all published and submitted proposals
71. CANNOT create opportunities, submit proposals or invite others

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## ***PROPOSAL DEVELOPMENT ROLES***

### Proposal Champions (PC)

72. Can be multiple Proposal Champions in an account **but** ONLY ONE per [Opportunity Team](#)
73. Invited by the Enterprise Authority or Enterprise Proxy
74. Can create and publish opportunities and submit proposals
75. Can see all the opportunities/proposals they create and submit
76. Can assign Opportunity Managers and Proposal Observers for opportunities they create

### Opportunity Managers (OM)

77. Can be multiple Opportunity Managers in an account **but** ONLY ONE per [Opportunity Team](#)
78. Invited by the Enterprise Authority, Enterprise Proxy or Proposal Champion
79. Can develop and publish opportunities but cannot submit proposals
80. Can see only the opportunities/proposals they are assigned to
81. Can invite Proposal Observers to [Opportunity Team](#) they are assigned to

### Proposal Observers (PO)

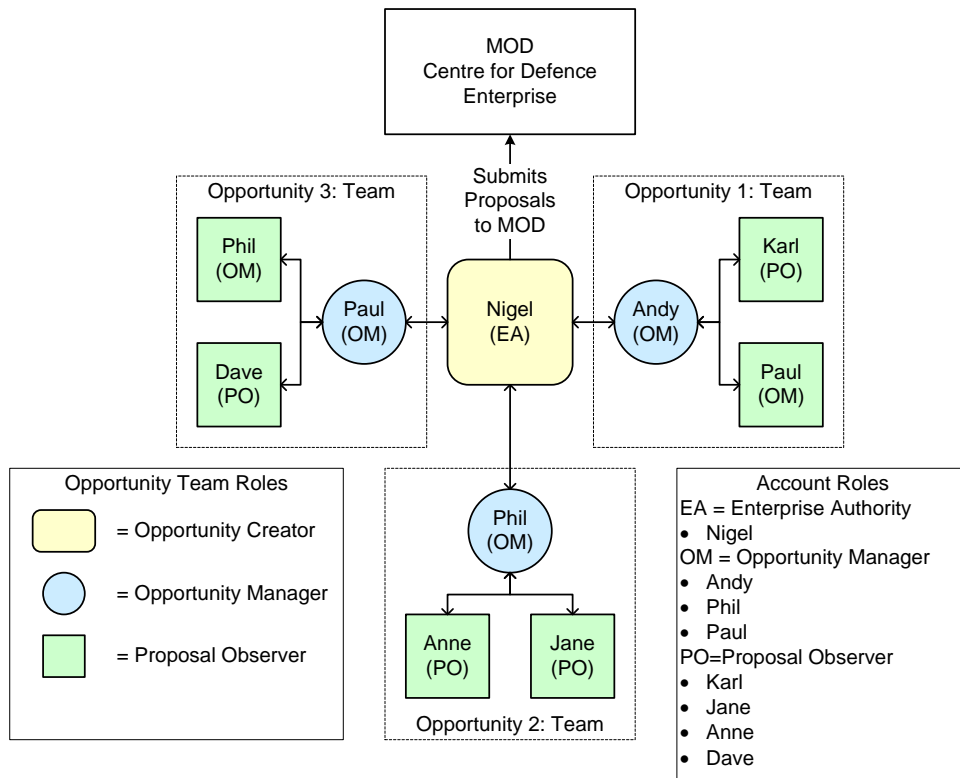
82. Can be multiple Proposal Observers in an account AND on each [Opportunity Team](#)
83. Invited by the Enterprise Authority, Enterprise Proxy, Proposal Champion or Opportunity Manager
84. Can see only those published opportunities and proposals where they are team members
85. Cannot create opportunities, submit proposals or invite others

### MAPPING ACCOUNT ROLES TO MY ORGANISATION

86. Two organisation types are considered to illustrate the mapping of Account roles to an organisation. The two organisation types are:-
- Central Control.
  - Federated Control
87. Noting that there are many forms of organisation, only two are considered here for the purpose of demonstrating the flexibility of the mapping options.

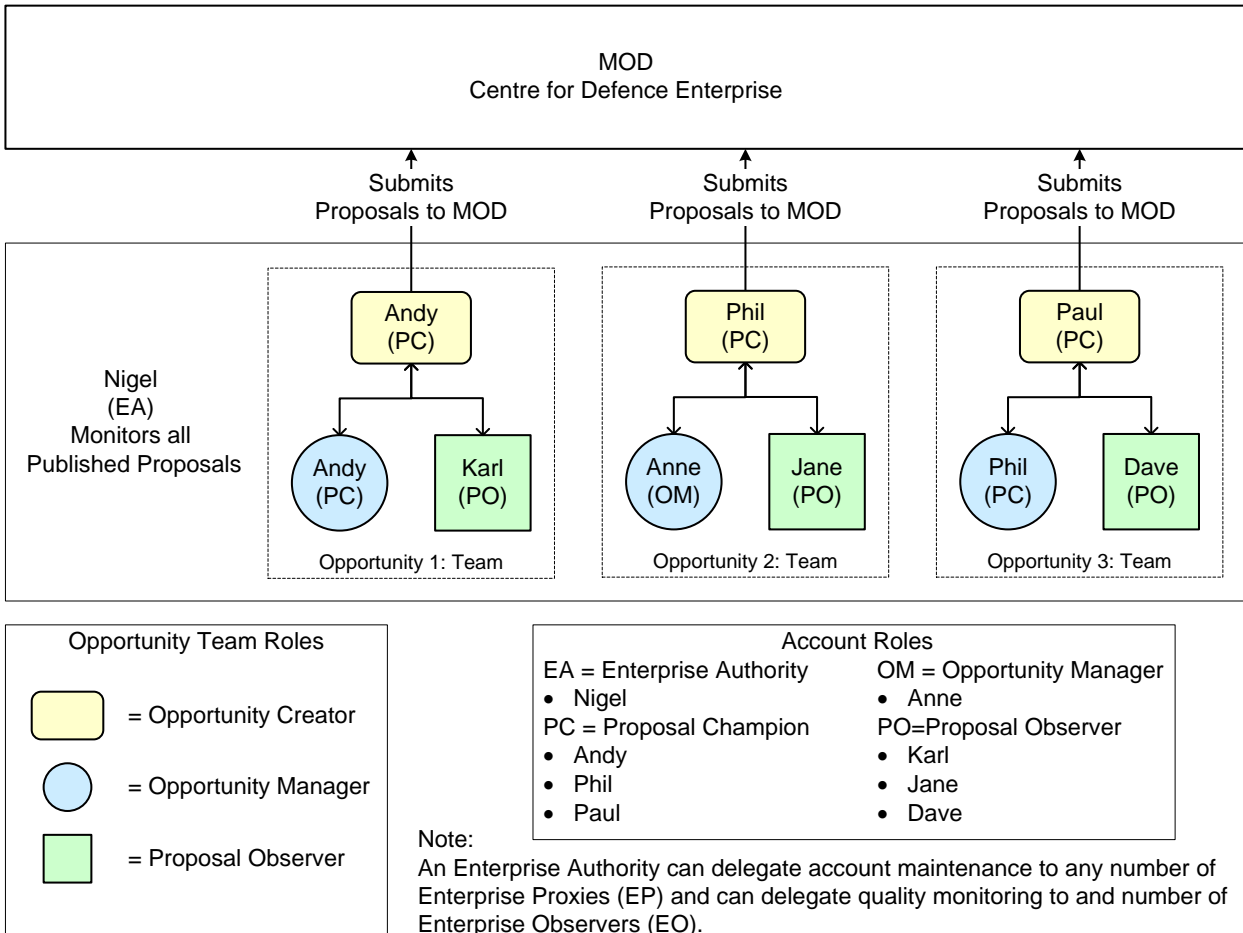
#### Central Control

88. Central Control is for use in an organisation that requires all development of opportunities and submission of proposals to MOD to be managed via a single centre.



## Federated Control

89. Federated Control is for use in an organisation that delegates the authority to develop opportunities and submission of proposals to MOD to multiple regional or administrative centres. An example of a federated control structure is shown here.....

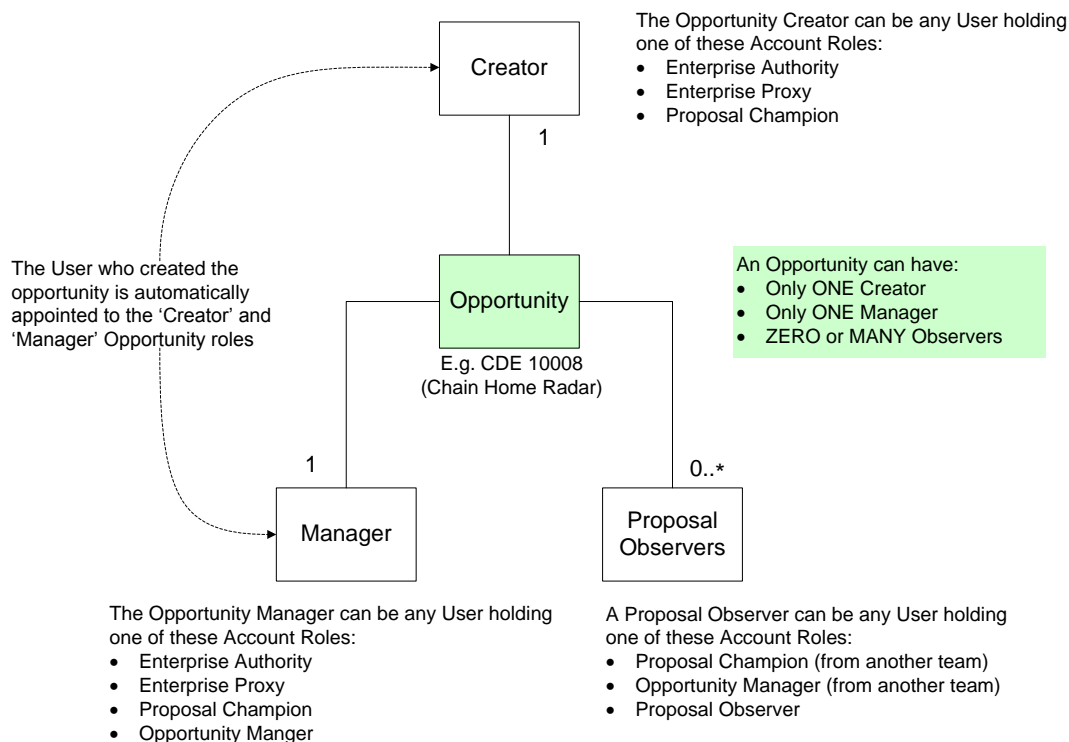


## MULTIPLE-USER OPPORTUNITY TEAMS

90. All 'Opportunity Teams' are built by assigning Account Users to Opportunity Roles. The Opportunity Roles are:
- Opportunity Team Creator: Generates the title and description to create the opportunity and submits the opportunity as a completed proposal to MOD
  - Opportunity Team Manager: Enters all of the information into the Opportunity development web forms; that lead ultimately to the proposal. Publishes draft proposals for review by nominated Users
  - Opportunity Team Proposal Observer: Reviews the published draft proposal and communicates with the opportunity creator and manager.

### **OPPORTUNITY TEAM STRUCTURE**

91. Every Opportunity can have Users assigned to it as shown ....



## Opportunity Team Structure

92. The assignment of Users to Opportunity Roles is described in the [Managing Opportunity Teams](#) section of this document.

## MANAGING OPPORTUNITY TEAMS

93. Opportunities are created by selecting the 'Create New Opportunity' button on the 'My Proposals Portfolio View' which is reproduced below; and is described more fully in the Proposal Manual which can be downloaded from the 'My Proposals' task area on the User's [Centre for Defence Enterprise Portal](#) home page.
94. The 'My Proposals Portfolio View' presented herein describes those interfaces that are necessary to manage Opportunity Teams in a Multiple-user Account.

1 User: md@LargeEnterprise.com - Enterprise Authority

### My Proposals

Ref	Title	Description	Status	Published Status	Opportunity
<a href="#">CDE10006</a>	Covert Tags	Tagging of friend or foe inventories to enable covert identification and tracking of items in urban environments	Final	Published	<a href="#">Details</a> <a href="#">Users</a> <a href="#">Reset to Draft</a> <input type="button" value="Submit"/>
<a href="#">CDE10007</a>	Coded Fuses	Intelligent fuses for detonating explosives that will only work when handled by an authenticated user and in an authenticated munition.	Created	Unpublished	<a href="#">Users</a>
<a href="#">CDE10008</a>	Chain Home Radar	Pulsed radio frequency wave generation to illuminate an area of sky with reflected waves from an object being used to determine its range and bearing.	Final	Published	<span style="border: 1px solid #4f81bd; border-radius: 50%; padding: 2px 5px;">2</span> <a href="#">Details</a> <a href="#">Users</a> <a href="#">Reset to Draft</a> <input type="button" value="Submit"/>
<a href="#">CDE10026</a>	Energy Storage and Power Generating Buoys.	Maritime vessels capable of converting storm energy into electrical power. Deployed in the open sea the buoys can self navigate to rendezvous points when fully charged.	Draft	Published	<a href="#">Edit</a> <a href="#">Details</a> <a href="#">Users</a>
<a href="#">CDE10029</a>	Jammers for comms	Comms jammer	Deciding	Published	n/a
<a href="#">CDE10038</a>	Disruptive Communications	Automatic generation of C3I which is not the commander's intent but automatically generated counter intelligence to confuse the enemy.	Draft	Published	<a href="#">Users</a>

3

95. The points of relevance for the 'My Proposals' Portfolio View graphic are:-

Point #	Description of Point of Relevance
1	The view shown here is for the Enterprise Authority. The links available to a given User will vary dependent the Account Role held. See the <a href="#">Account Role Permissions</a> table.
2	The 'Users' link is only visible to those users with Enterprise Roles or appointed specifically to an Opportunity Team. See the <a href="#">Account Role Permissions</a> table. The effect of selecting the 'Users' link is described in the <a href="#">Opportunity User Roles</a> section of this document.
3	The 'Users' link appears in the [Ref] column after a proposal has been submitted to MOD. Access to the Proposal post submission may still be controlled as described in the <a href="#">Opportunity User Roles</a> section of this document.

## OPPORTUNITY TEAM - USER ROLES

96. The 'Opportunity User Roles' form is accessed by selecting the 'Users' link from the [Opportunity] column of the [My Proposals](#) Portfolio View.

User: md@LargeEnterprise.com - Enterprise Authority

1

Opportunity User Roles

Ref: CDE10008  
 Title: Chain Home Radar  
 Description: Pulsed radio frequency wave generation to illuminate an area of sky with reflected waves from an object being used to determine its range and bearing.

Role	Name	Change/Delete
Creator <span style="float: right;">2</span>	Managing Director	<a href="#">Change</a> <span style="float: right;">5</span>
Manager <span style="float: right;">3</span>	Managing Director	<a href="#">Change</a> <span style="float: right;">5</span>

[Add Observer](#) 6

[Save Permissions](#) 7    [Cancel](#) 8

97. The points of relevance for the 'Opportunity User Roles' graphic are:-

Point #	Description of Point of Relevance
1	This form is the means by which information is shared and tasks may be coordinated with respect to an individual Opportunity.
2	The <a href="#">Opportunity Team Creator</a> role can be undertaken by any user with the <a href="#">Enterprise Authority</a> , <a href="#">Enterprise Proxies</a> , OR <a href="#">Proposal Champion</a> privileges. Only the user listed as the <a href="#">Opportunity Team Creator</a> can submit a published Proposal to MOD.
3	The Opportunity Manager role can be undertaken by any user with <a href="#">Enterprise Authority</a> , <a href="#">Enterprise Proxies</a> , <a href="#">Proposal Champion</a> OR <a href="#">Opportunity Manager</a> account role. Only the user listed as the <a href="#">Opportunity Team Manager</a> can access the Opportunity information entry forms and publish a Proposal.
4	When an Account User with appropriate permissions first creates an opportunity the User is simultaneously appointed as the <a href="#">Opportunity Team Creator</a> and <a href="#">Opportunity Team Manager</a> .
5	The 'Change' link is available to those users holding appropriate Account Roles as shown in the <a href="#">Account Role Permissions</a> table. What results from the selection of the 'Change' link is described in the <a href="#">Change User</a> section of this manual.
6	The 'Add Observer' button is available to those users holding appropriate Account Roles as shown in the <a href="#">Account Role Permissions</a> table. What results from the selection of the button is described in the <a href="#">Add Observer</a> section of this manual.
7	Selecting the 'Save Permissions' button causes the information in the 'Opportunity User Roles' form to be updated and the user is returned to the <a href="#">My Proposals Portfolio View</a>
8	Selecting the 'Cancel' button cause the User to be returned to the <a href="#">My Proposals Portfolio View</a> WITHOUT making any changes to the User's details.

## Add Observer

98. Selecting the 'Add Observer' button on the [Opportunity User Roles](#) form displays the user selection pull down pick list as shown below...

User: md@LargeEnterprise.com - Enterprise Authority

### Opportunity User Roles

User

(Select)
▼

(Select)

First Actor

Second Actor

First Northern Manager

99. The points of relevance for the 'Add Observer' graphic are:-

Point #	Description of Point of Relevance
1	The pull down list control provides access to the names of Account Users.
2	Only those Users that are eligible for selection as <a href="#">Opportunity Team Proposal Observers</a> appear in this list. See also the <a href="#">Account Role Permissions</a> table.
3	Selecting the 'Save' button causes the User to be assigned to the role and the operator is returned to the <a href="#">Opportunity User Roles</a> form.
4	Selecting the 'Cancel' button causes the operator to be returned to <a href="#">Opportunity User Roles</a> form WITHOUT making any changes to the Opportunity's Role details.

## Delete Observer

100. An Observer can be removed from an Opportunity Team by selecting the 'Delete' link on the 'Opportunity User Roles' form as shown below....

User: md@LargeEnterprise.com - Enterprise Authority

### Opportunity User Roles

Ref: CDE10008  
 Title: Chain Home Radar  
 Description: Pulsed radio frequency wave generation to illuminate an area of sky with reflected waves from an object being used to determine its range and bearing.

Role	Name	Change/Delete
Creator	Managing Director	<a href="#">Change</a>
Manager	Managing Director	<a href="#">Change</a>
Observer	First Northern Manager	<a href="#">Delete</a>
Observer	First Actor	<a href="#">Delete</a>
Observer	Second Actor	<a href="#">Delete</a> <span style="border: 1px solid #4f81bd; border-radius: 50%; padding: 2px 5px; font-weight: bold;">1</span>

101. Selecting the Delete link causes the named observer to be removed from the Opportunity Team. The named observer is can be reappointed at any time by using the 'Add Observer' button.

## Change User

102. Selecting the 'Change' link on the [Opportunity User Roles](#) form displays the user selection pull down pick list as shown below...

User: md@LargeEnterprise.com - Enterprise Authority

### Opportunity User Roles

User

Save

Cancel

Managing Director 1

(Select)  
 Second Actor  
 Managing Director  
Northern Director 2  
 Southern Director  
 Eastern Director  
 Western Director  
 First Northern Manager

103. The points of relevance for the 'Change' graphic are:-

Point #	Description of Point of Relevance
1	The pull down list control provides access to the names of Account Users.
2	Only those Users that are eligible for selection for the <a href="#">Opportunity Team Creator</a> OR <a href="#">Opportunity Team Manager</a> appear in this list. See also the <a href="#">Account Role Permissions</a> table.
3	Selecting the 'Save' button causes the User to be assigned to the role and the operator is returned to the <a href="#">Opportunity User Roles</a> form.
4	Selecting the 'Cancel' button causes the operator to be returned to <a href="#">Opportunity User Roles</a> form WITHOUT making any changes to the Opportunity's Role details.