

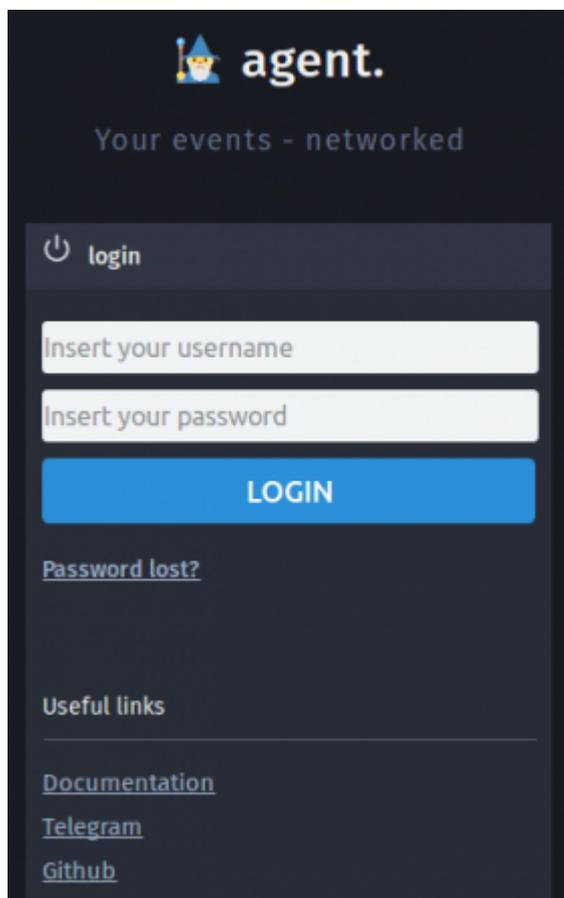
# Agent Guide

Agent is the main project management tool used in [Open Coop Work \(OCW\)](#) space so that participants can log, review, validate and finally get compensation for their work. Following the steps described below you will be able to explore and use all its main functions. However, Agent is destined to fulfil many more and wider purposes but this guide is mostly focused on the ones that are mainly needed to OCW participants.

Enjoy!

## Login

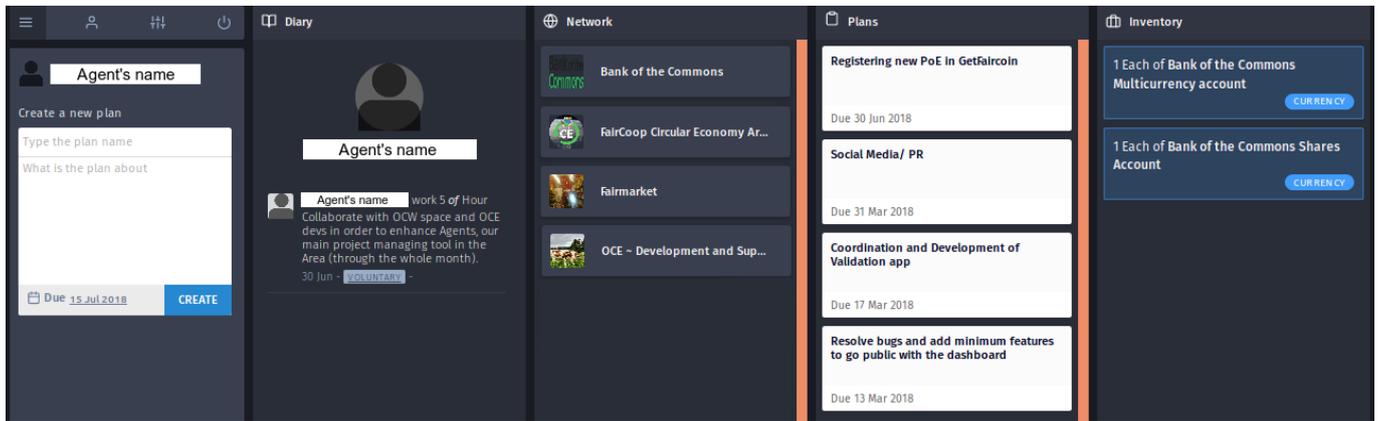
To enter into Agent application you need to go at [agent.fair.coop](https://agent.fair.coop) and use you OCP credentials (username & password) to login.



In case you don't have an OCP account yet please fill in this [joining form](#)

## Dashboard

Is the first screen that you see as soon as you login.



There you have an overview (in different columns) of:

1. **Diary** - Your own contributions so far, chronologically ordered starting from the latest one on top.
2. **Networks** - Areas and projects that you participate, thus can interact with.
3. **Plans** - Active work plans of the (above) different networks that you participate in which you've already logged some work. They are ordered by creation date, from the newest to the older one.
4. **Inventory** - Production items that you've acquired as an outcome from specific work processes that are completed. These can be either physical items or virtual ones (e.g. an account).

You can click on any **Plan** or **Network** to find out more specific information for each case, edit and add various tasks.

*Hint!* At any point you click on your Agent's name (at the left column) or even on the small person icon  to return on this Dashboard.

## Settings

You can access your Agent's settings by clicking on the corresponding icon  on the top of the left main menu column.

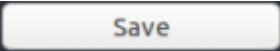
### General info

There you can add or edit information regarding yourself.

The image shows a mobile application interface for editing a profile. At the top, there is a header with a person icon and the word "General". Below this, there are four main sections, each with a label and a corresponding input field:

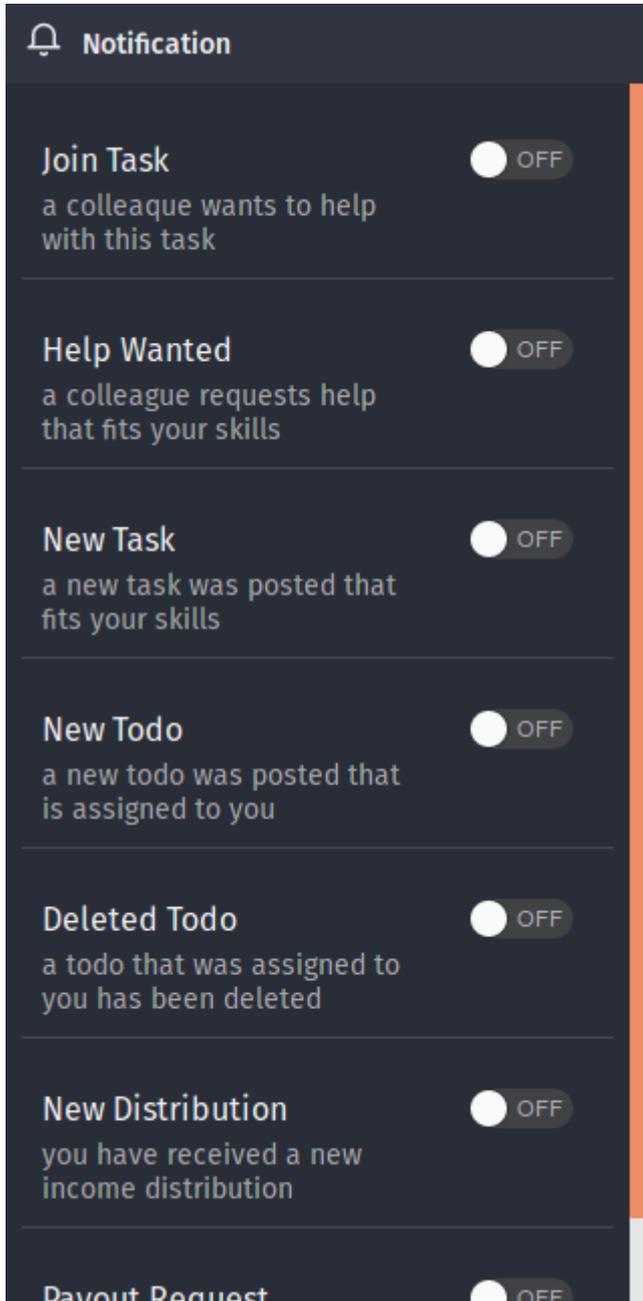
- Name:** A text input field containing the placeholder text "Agent's name".
- Email:** A text input field containing the placeholder text "Agent's email".
- Photo:** A text input field containing the placeholder text "Agent's photo".
- Bio:** A larger text area containing the placeholder text "Brief resume".

At the bottom of the form, there is a prominent "Save" button.

Click on 'Save' button  to save any changes.

### Notification settings

There you can turn on / off the settings regarding the available notification messages, which you then receive by e-mail.

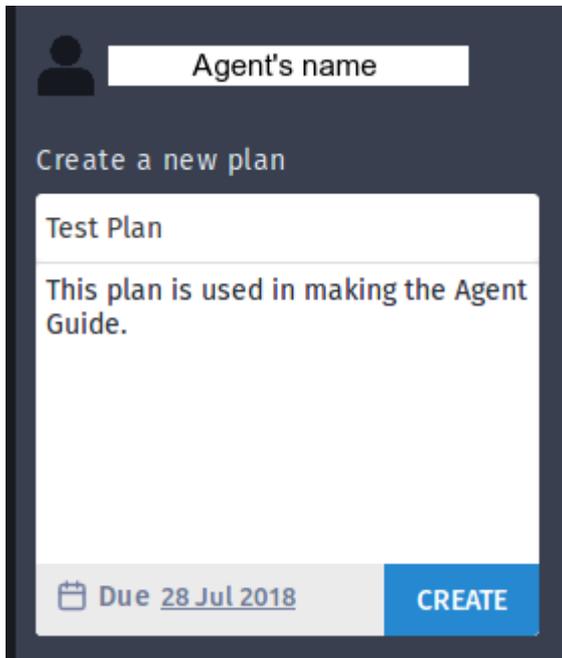


## Create Plan

This is a procedure to create a new work for a network (project), which is usually the responsibility of coordinators or OCW Area's facilitators.

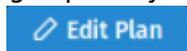
This action may be performed from any screen, since the creation plan column is always visible on the left-side column where the main menu is.

### 1. Create Plan



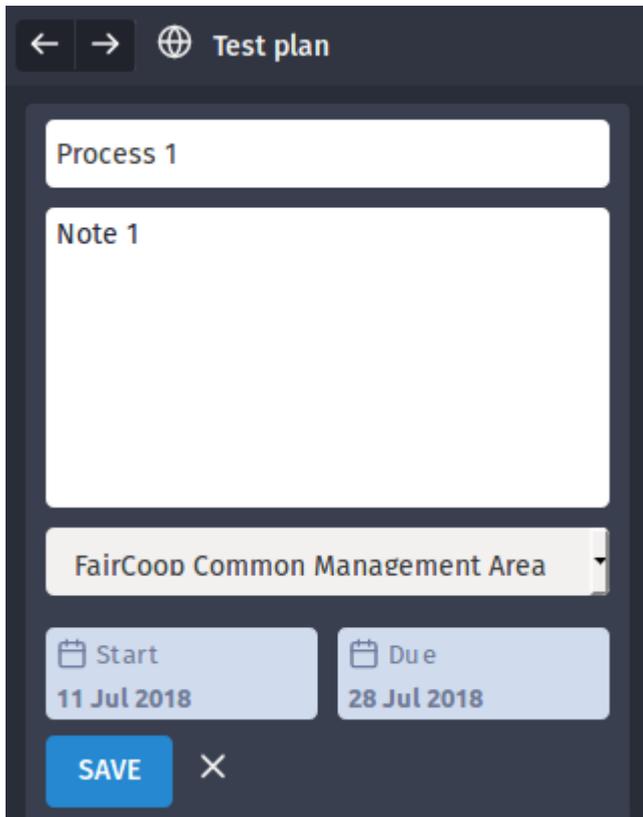
1. Type the **Name** and a short **Description**.
2. Define the **Due date** (click on the existing date and choose the appropriate due date from the calendar).
3. Click on the blue '**CREATE**' button 

Immediately afterwards you should see a green stripe on top-right of your screen with a verification message that your plan is created correctly  and follow on the next steps.

*Note!* Even well planned work procedures may need review and alterations thus editing capability of the above information is available any time by clicking on the blue '**Edit plan**' button  on the top-right corner of the screen.

## 2. Create Process(es)

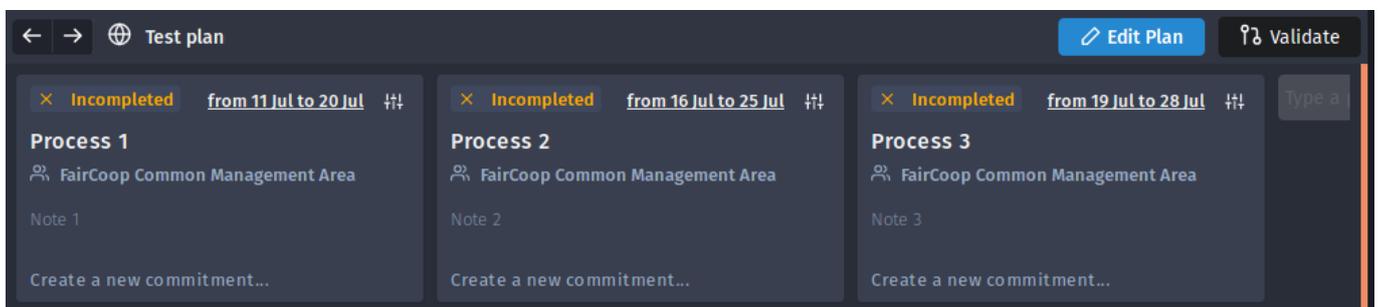
Most plans are divided into processes (sections) so that you may break up your work according to different types, networks involved or any other specification you prefer.



To set-up a process you need to:

1. Fill in the **Name** and a short **Note** that describes it.
2. Choose the **Scope (Network)** of the process.
3. Set the **Start and Due dates** by clicking on the corresponding fields and choose from the calendar. Note that these cannot be set outside the boundaries of Start (current) and Due dates of the plan they belong to.
4. Save the process by clicking on the blue '**SAVE**' button  or Cancel it by clicking on the '**X**' sign 

At the end, you work plan could look like this and include many different Processes ordered by Due Date, which should be defined on the next step.



*Note!* At any point you can edit any of the above settings of a process by clicking on the corresponding sign  located at the top-right corner of each process. You may even:

1. **Set the process as completed** when is finished.
2. **Delete the process** if is not required any more.

### 3. Create Commitment(s)

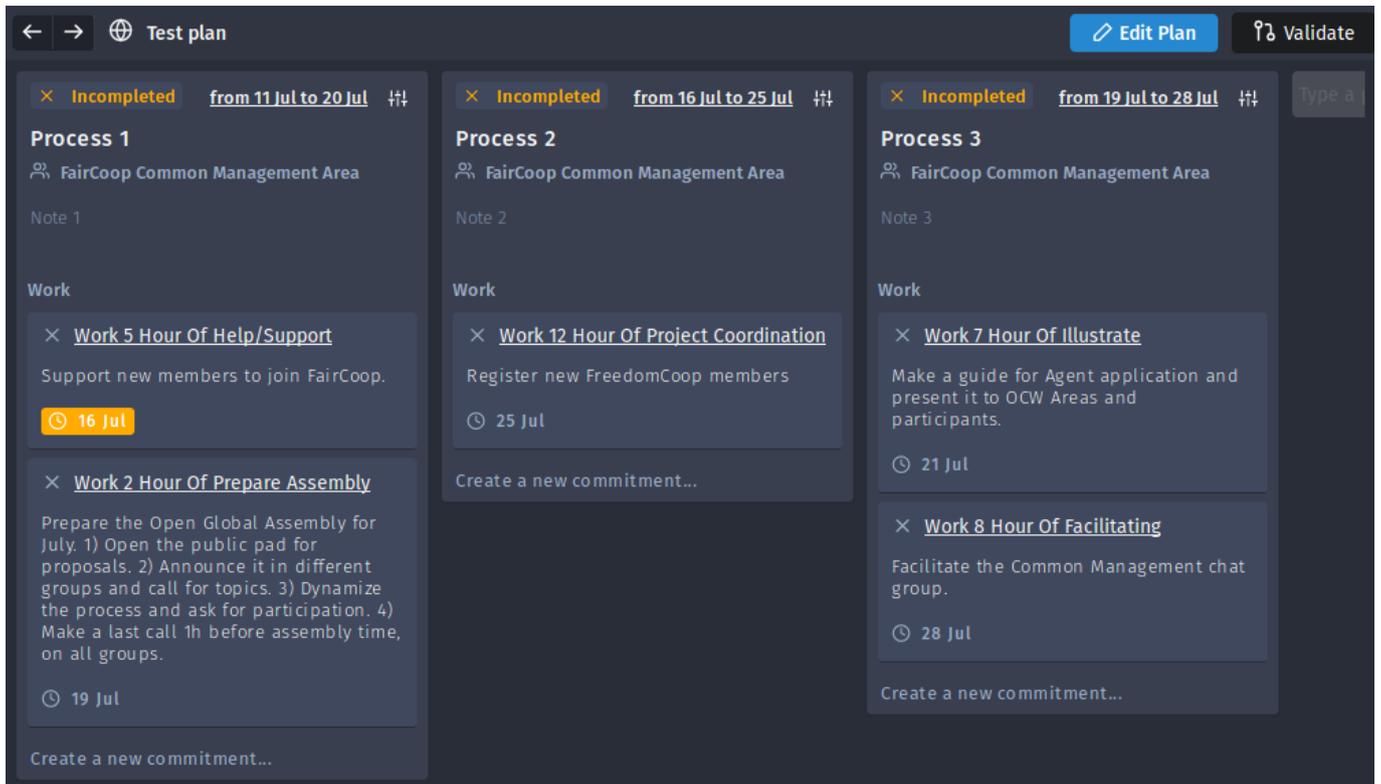
Then, you need to define the specific commitments (events) which are required to fulfil each of the above processes. Choose an existing process and click on the sign to **create a new commitment**

Create a new commitment...

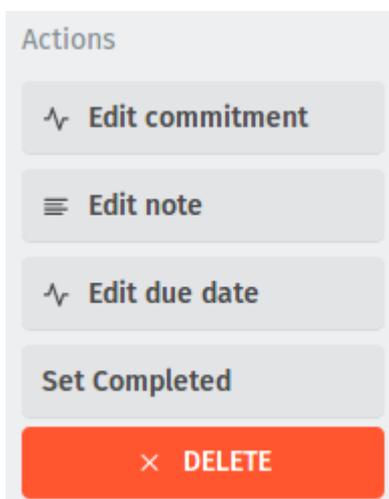
Each planned commitment requires certain information:

- 1. Select your event** - Type of the event which is required. Usually for the OCW needs we just log 'Work' commitments. In some special cases or other Networks various other cases of events may be required as Agent offers the ability to plan and perform many different economic and productive processes.
- 2. Select your resource** - Resource that is needed to perform the above required event. For OCW needs that is usually a specific **type of work (skill)** that participants need to provide.
- 3. Log the amount and Select the corresponding unit** - You may choose all kind of different units (hours, words, FairCoin etc) for your commitment and log the required amount for that. For OCW needs we always set the unit to 'hours' and log the required amount of work hours needed to perform the commitment.
- 4. Write some note** - Describe the required commitment so that participants can have all the basic information that is required to perform the necessary actions.
- 5. Set Due date** - Select the planned due date of the commitment, which obviously cannot extend further than the due date of the process which contains it.
- 6. Publish Commitment** - Click on the '**PUBLISH**' button  to log the required commitment.

After publishing several commitments, your overall plan view may look like the following screen where all basic info appear.



*Note!* You can edit any of the above information, mark as complete or even delete any commitment by just clicking on a specific one and then select the proper action from the following menu which appears on the left of the pop-up window.



## Log Contribution

A contribution is considered as an event which helps in fulfilling a specific requirement included in a plan.

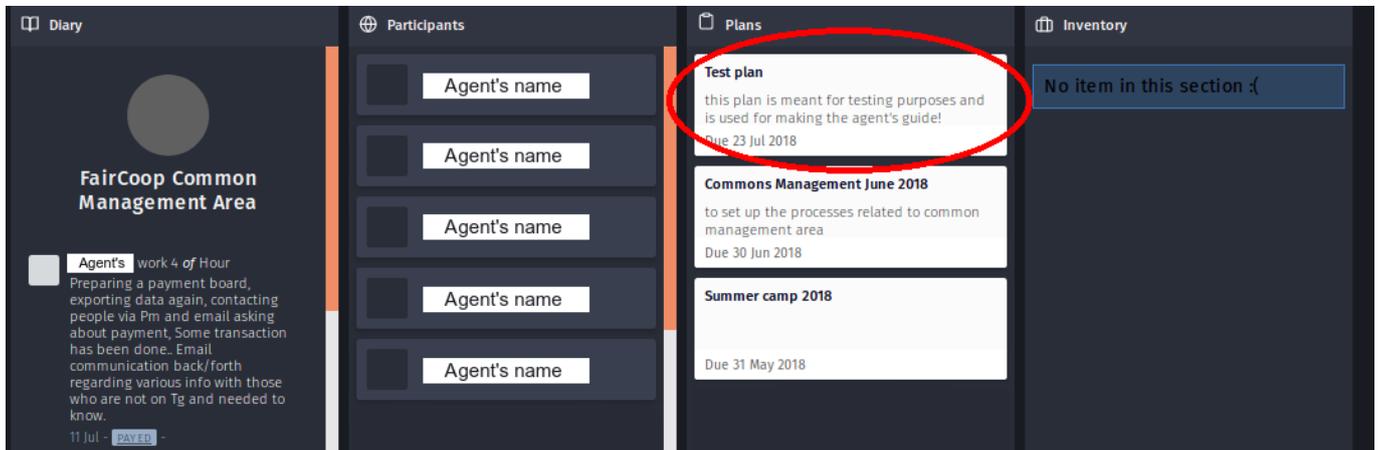
Contribution should be logged upon completion (e.g. work has been performed) against a previously required commitment, usually created by the Area facilitator or Project coordinator. Of course, any agent can add more requirements or even make its own plan(s), but that should better be organised in the corresponding working group(s) beforehand.

Below are explained the specific steps you need to follow, using as a test case a work plan of

Common Management Area.

### 1. Select plan

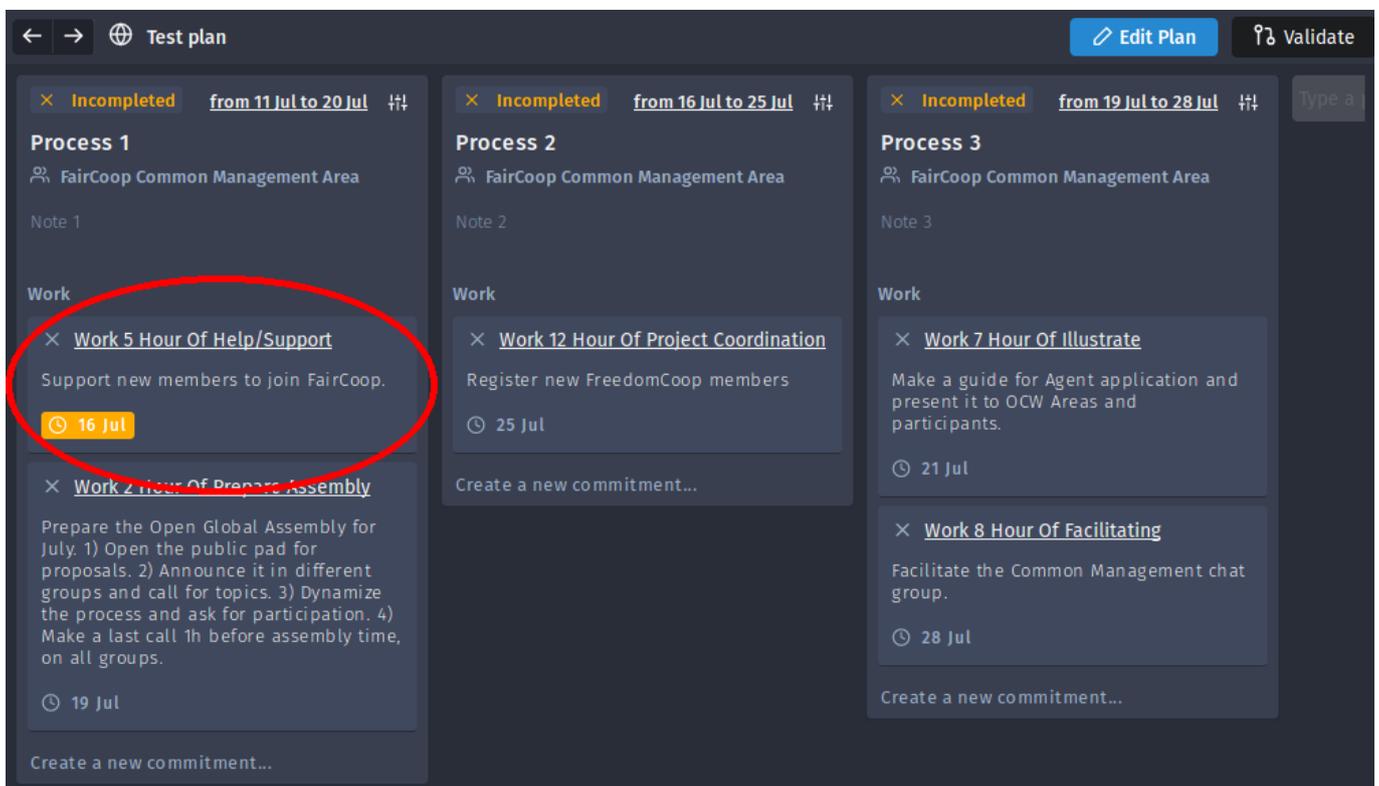
That may be found directly from your Agent's Plans list (column) or by first selecting the Network where this plan is published.



For example, on the above picture, we click on the 'Test plan'.

### 2. Select a Commitment

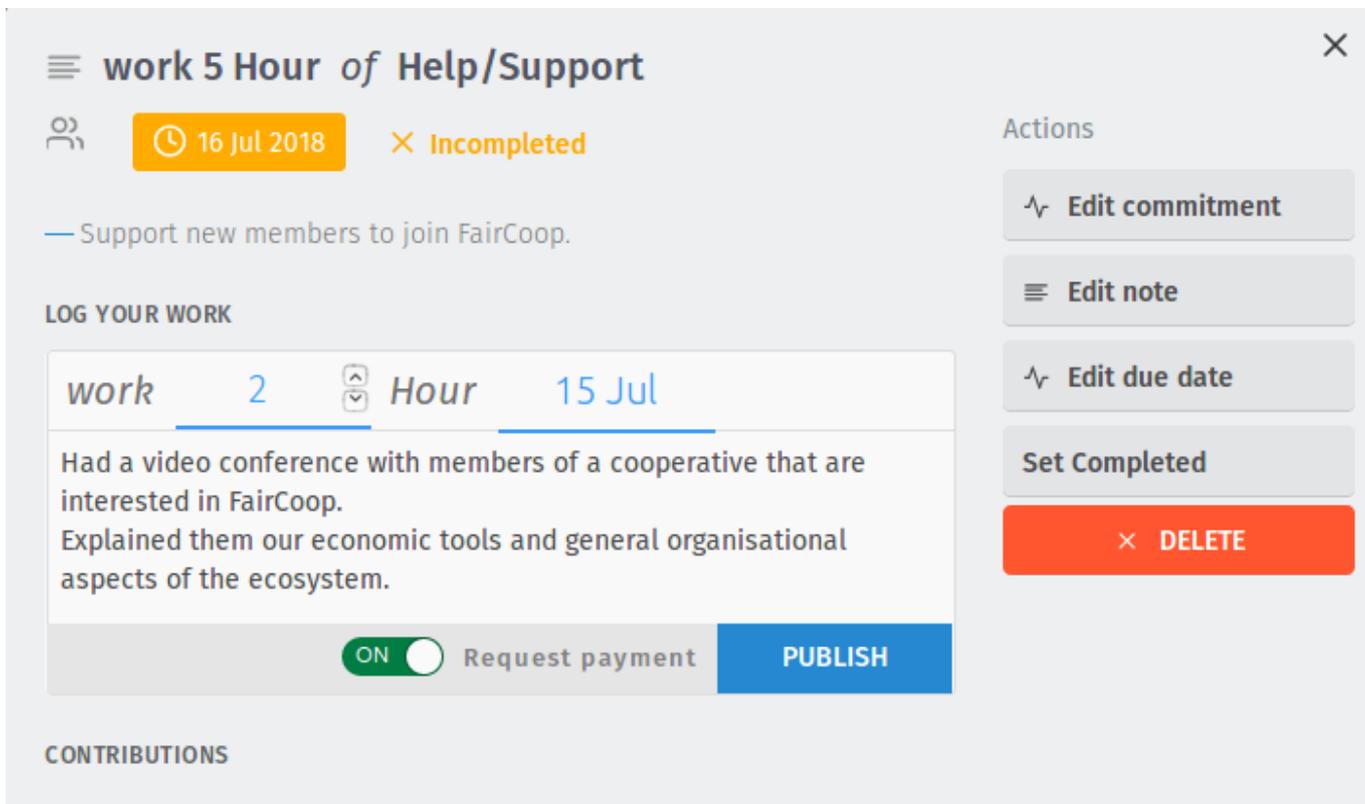
Then you need to select the required commitment which is related to your contribution.



For example, on the above picture, we click on the 'Help/Support' requirement.

### 3. Add Contribution

Click on the commitment box and a pop-up window will appear, showing more info, already logged contributions and letting you add your own.



Make sure you fill in correctly:

#### 1. Hours of work

**2. Date of work** (if done in several days or a longer period you can just select the day in which work is finished and mention that in the details part)

**3. Any details that describe your contribution** e.g. a short summary, a pad or a web link. For OCW specifically, this is important for other participants that would want to review or validate your contribution afterwards. Contributions with a poor or insufficient description would probably be neglected or even rejected.

**4. Request payment** switch is ON by default which means that you expect to be paid for that contribution. If your contribution is Voluntary you need to click on that switch and turn it OFF.

**5. Click on 'PUBLISH' button**  to log your work contribution. Wait for the green stripe on the top-right of your screen  which verifies that your contribution has been logged correctly 😊

Now your contribution appears in the following list, at the bottom of the window, and you can **edit**

 **Edit** or even **delete**  **Delete** it any time by using the corresponding signs.

**CONTRIBUTIONS**

 **Agent's name** work 2 Hour

Had a video conference with members of a cooperative that are interested in FairCoop. Explained them our economic tools and general organisational aspects of the ecosystem.

**PAYED**

15 Jul -  [Edit](#) -  [Delete](#)

## Validate Contribution

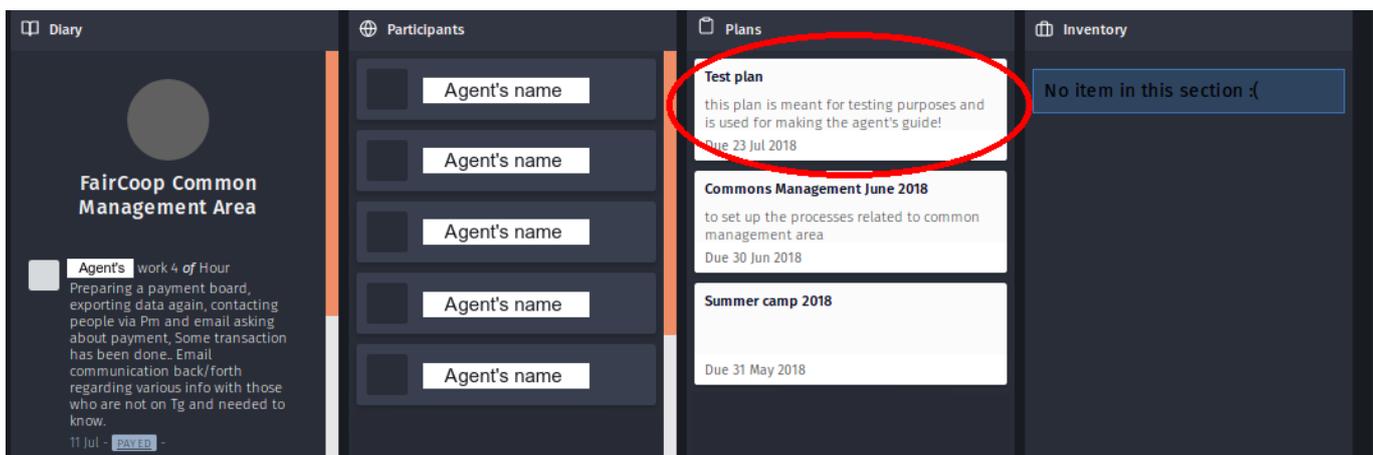
Validation is a procedure required for OCW payments and is performed by its participants as described in the [Value Distribution part](#) of the OCW scheme. Each work contribution should be reviewed and then validated by other two participants, otherwise it won't be accounted for payment by the OCW assembly. Of course, such validations are not necessary (thus not applicable) for voluntary work.

Validation function is included in Agent application thus is a logic that may be used by any other network or project as well. The next part however, is focused in OCW validation system where you can review and validate the work contributions of any other participant.

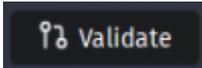
Again, we are using the Test plan of Common Management Area as an example, validating the contribution logged in the [previous section](#).

### 1. Select plan

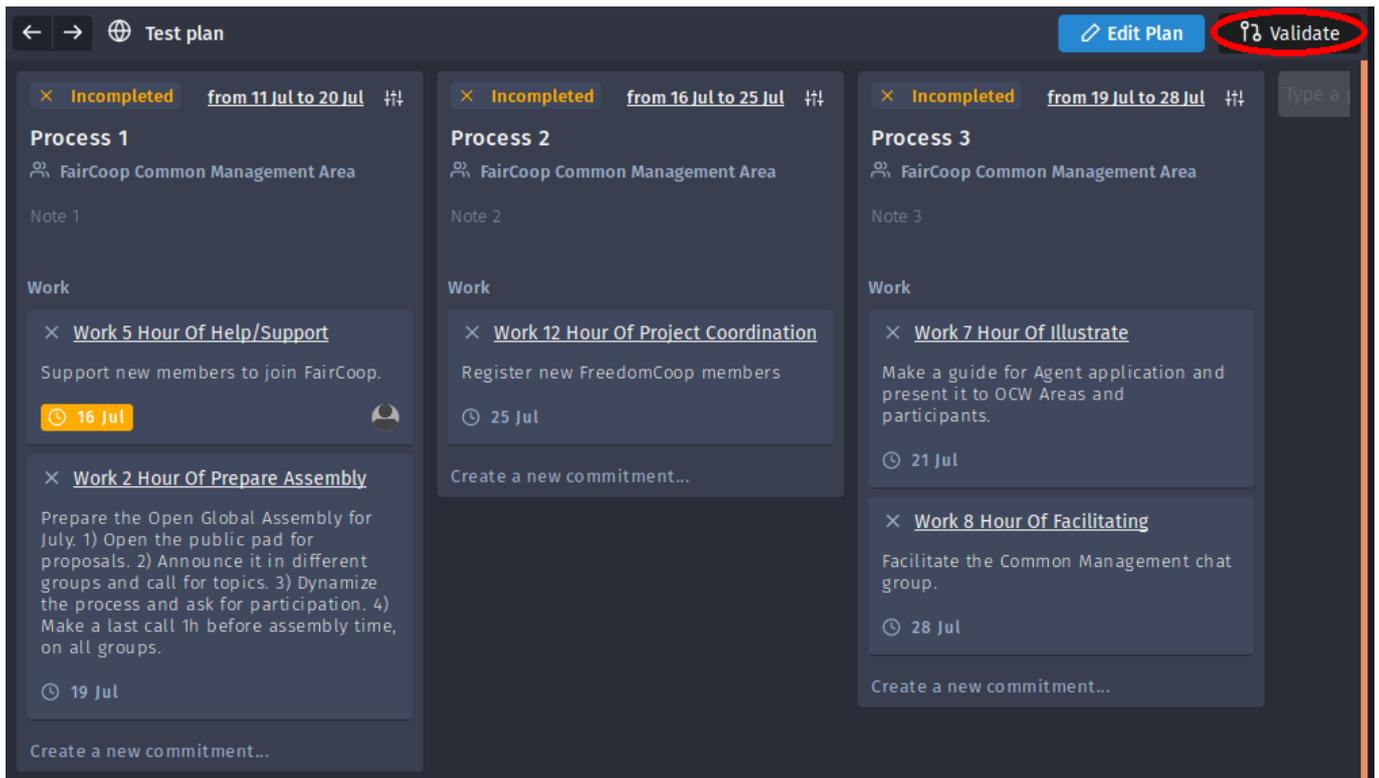
The first step is to select a specific plan which includes the contributions you want to validate. That may be found directly from your Agent's Plans list (column) or by first selecting the Network where this plan is published.



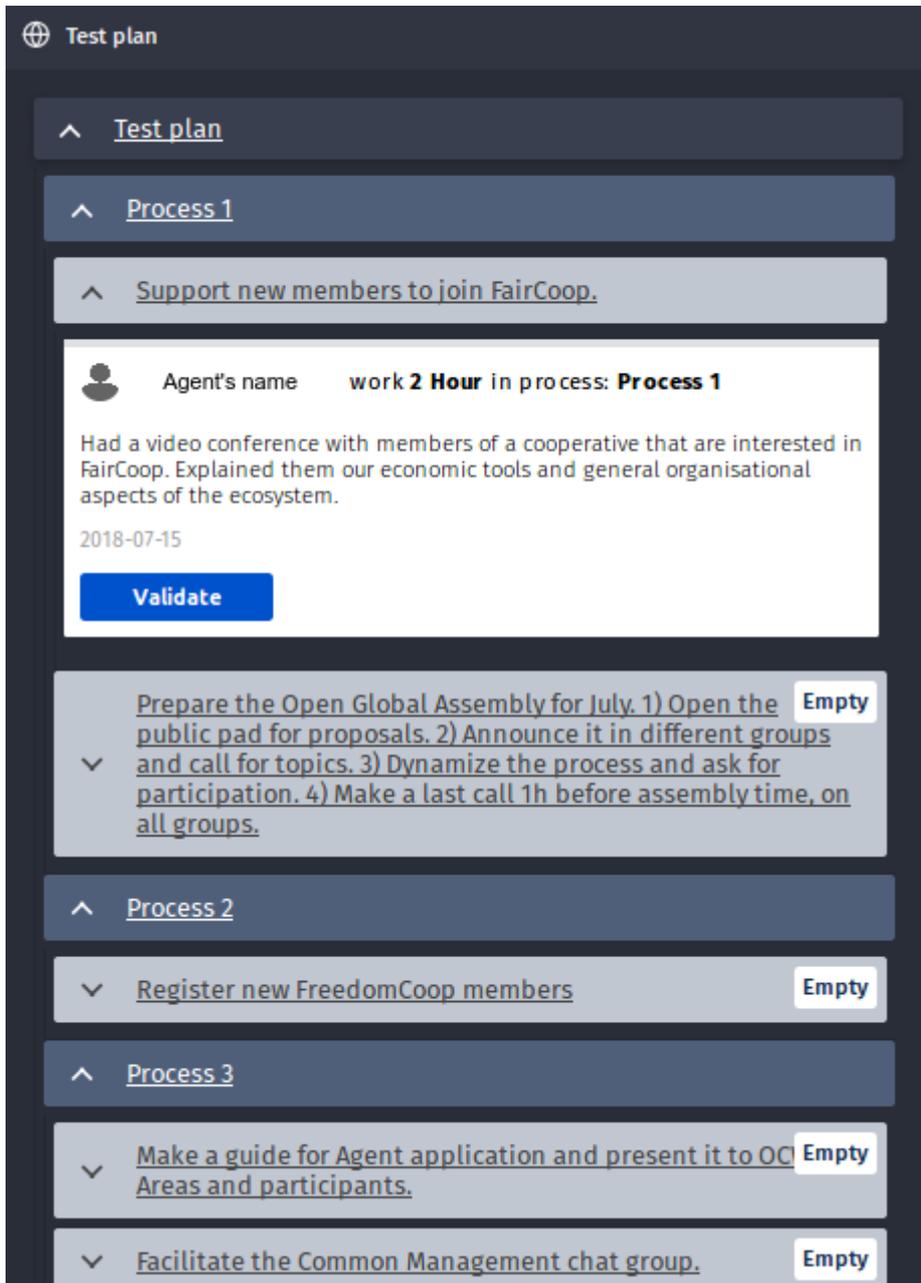
### 2. Validation list

Click on the '**Validate**' sign, on the top-right corner of your screen  to move onto the

Validation list which shows all the contributions of the above plan.



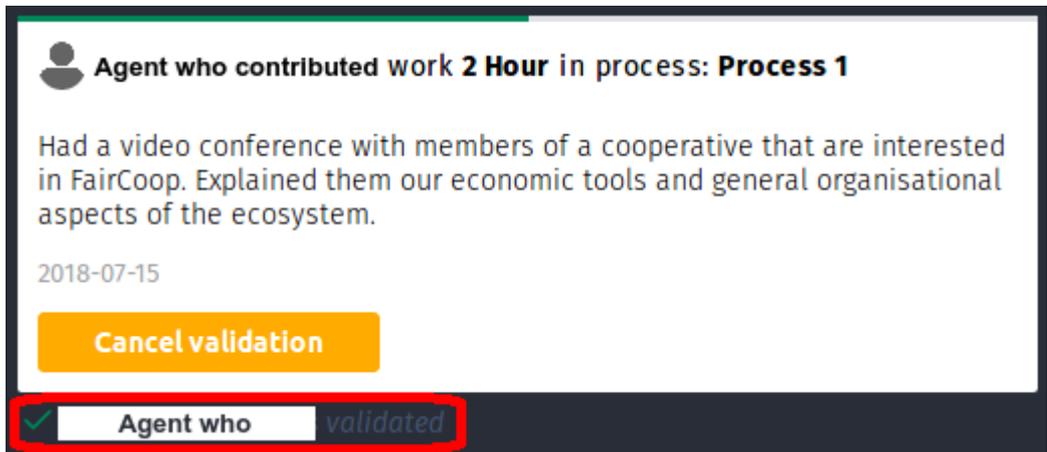
There you can see all the processes included, the corresponding required commitments and any logged work contributions, as a folder structure which you can expand or contract by clicking on the **Down**  or **Up**  arrows respectively.



### 3. Validate contribution

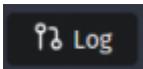
After selecting and reviewing a contribution of another participant, you can place your validation by clicking on the blue **'Validate'** button 

Then you can see your Validation put below that specific contribution.



Which you can cancel at any point just by clicking on the yellow '**Cancel Validation**' button



*Hint!* Click on the '**Log**' sign on the top-right corner of your screen  to return at the usual Agent view where you can plan or log your events.

OCW participants can also use [Kispagi](#) to have an overview of all work tasks related to OCW Areas and projects. There you can even review the ones that are not logged in Agent application. Remind you that it uses a 15' cache, so your Validations or Contributions won't show up immediately.

## More info

If you have more questions or any suggestion, you are welcome in our Telegram groups:

1. **Welcome group** where you can discuss more general issues about the the whole OCE network <https://t.me/ocewelcome>
2. **OCE Testers** where you can ask for any additional help directly. <https://t.me/joinchat/A9k9vg3-PcjzUJAlzScomQ>

Also, in the [Open Cooperative Ecosystem \(OCE\)](#) page you can learn more about the developer's team and the overall network.

Code may be found in [Github project's page](#).

Most of the OCE dev's chat often takes place on [social.coop](#).

## Work in progress

Agent is a software under development and following the OCE principles new components and features is scheduled to be added on the way.

### Missing features

Some of the new features that are prioritized to be added are:

1. User registration
2. Join / Leave an organization
3. FairCoin wallet

## Roadmap

This is a brief overview of our general roadmap, while any updates are decided in OCE devs assembly.

From:

<https://wiki.fair.coop/> - **FairCoop WIKI**

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[https://wiki.fair.coop/en:agent\\_guide](https://wiki.fair.coop/en:agent_guide)

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