Improve your partner relationships with IBM Sterling Partner Engagement Manager

Automate partner onboarding and management for EDI and MFT

IBM **Sterling**

The case for automated partner onboarding has never been stronger

IBM

68%
of organizations exchange important information with **250+** partners, customers and suppliers *

2.5x
increase in use of gateways for B2B information exchange with partners over two years *

53%
of respondent enterprises cited a lack of visibility into trading partner relationships as a main concern with the existing B2B integration solution **

* IBM Supply Chain Data Report, Vanson Bourne, 2017
** Ovum, "IBM Partner Engagement Manager simplifies trading partner onboarding", 2018

Onboarding Challenge

Long & Manually Intensive "Contact-to-Transaction" Lifecycle

Lifecycle has multiple Phases, taking anywhere from 15-60 days

Day 0

Day 5

Day 45

Day 60

Day 60+

55 Days

Initial Contact
- Highly conversational
- Done by IT, call-center, sales agent, customer, or liaison
- Output is a contract, order, or agreement to proceed

Data Gathering
- Disconnected, manually intensive
- Orchestration of multiple activation activities
- Output is an activation or request

Config. Testing
- Service and protocol specific
- Last technical mile, all systems and gateways configured and tested
- Completed by IT
- Output is an "on-boarded" customer

Transact
- Administer Trading Partner Community Changes

Automated supplier onboarding with PEM

Relationships matter, they are not suppliers until they are onboarded

Yesterday	Today with PEM
Manual onboarding of new suppliers and managing existing ones	Increase productivity and reduce time to supply by automating supplier onboarding
Updating spreadsheets with supplier data or transferring updates from email can be inefficient and error prone	Eliminate "swivel chair" manual processes
Onboarding a new supplier can be very lengthy, 30 days or more	Reduce supplier onboarding by 75%
Several back-end systems may need updating when a supplier's record changes	RESTful API Integration to local assets, PEM also offers a central repository for managing trading partner information
Reliant on IT department for onboarding	Empower users and LOB through self-service

IBM
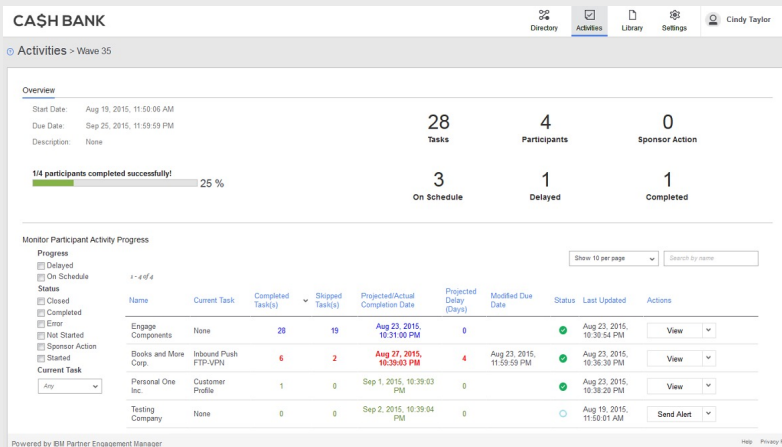
IBM Sterling Partner Engagement Manager

Interactive, Self-service Partner Onboarding workflow

- Compresses the "quote to cash" cycle time for onboarding new partners

- Flexible workflow with REST API integration to address a variety of use cases

- Utilizes an email & dashboard interface to allow partner a self-service approach to enter and review tasks

- Manages partners' and users' information with a centralized system of record

Dashboard tracking of each partner during their onboarding process

Centralized partner directory with easy access to individual partner profiles

PEM Standard

PEM with more pre-defined workflows, APIs, and administrative interfaces to help recognize a faster return on investment

Helps to better manage your partners' certificates, keys, and passwords through self service updates triggered by upcoming expirations

BANK

Assists supply chains by providing self-service EDI envelope setup and document testing to help provide a complete end-to-end automated onboarding

CA$H BANK

Directory | Activities | Library | Settings | Cindy Taylor

Activities > Wave 35

Overview

Start Date: Aug 19, 2015, 11:50:06 AM
Due Date: Sep 25, 2015, 11:59:59 PM
Description: None

28 **Tasks**
4 **Participants**
0 **Sponsor Action**

1/4 participants completed successfully! 25 %

3 **On Schedule**
1 **Delayed**
1 **Completed**

Monitor Participant Activity Progress

Progress
☐ Delayed
☐ On Schedule
Status
☐ Closed
☐ Completed
☐ Error
☐ Not Started
☐ Sponsor Action
☐ Started
Current Task
Any

Show 10 per page | Search by name

1 - 4 of 4

Name	Current Task	Completed Task(s)	Skipped Task(s)	Projected/Actual Completion Date	Projected Delay (Days)	Modified Due Date	Status	Last Updated	Actions
Engage Components	None	28	19	Aug 23, 2015, 10:31:00 PM	0		✓	Aug 23, 2015, 10:30:54 PM	View
Books and More Corp.	Inbound Push FTP-VPN	6	2	Aug 27, 2015, 10:39:03 PM	4	Aug 23, 2015, 11:59:59 PM	✓	Aug 23, 2015, 10:36:30 PM	View
Personal One Inc.	Customer Profile	1	0	Sep 1, 2015, 10:39:03 PM	0		✓	Aug 23, 2015, 10:38:20 PM	View
Testing Company	None	0	0	Sep 2, 2015, 10:39:04 PM	0		○	Aug 19, 2015, 11:50:01 PM	Send Alert

Powered by IBM Partner Engagement Manager

Help Privacy Policy

AS2 Certificates and Password Update Automation
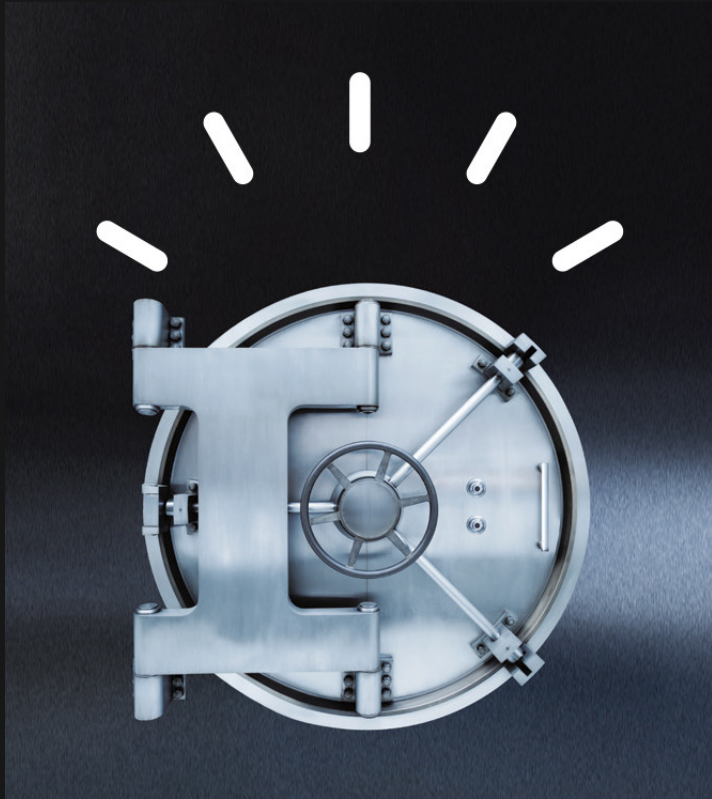
Maintaining partner certificates, keys, and passwords are critical to the business
- Certificates, keys, password lifetimes are becoming shorter
- More chances for expired certificates
- Greater effort to manage certificates, keys, and password

The average global 5,000 company spends approximately $15 million to recover from a certificate outage. These costs include remediation codes, loss of productivity, lost revenue, and damage to brand image.*

Partner Engagement Manager provides customers with the ability to:
- Detect expiring partner passwords and certificates and initiate updates
- Provide an automated contact validation process

* Source: 2017 Ponemon Institute survey of approximately 2,400 global respondents

Certificates, Keys, Passwords Update Use Case
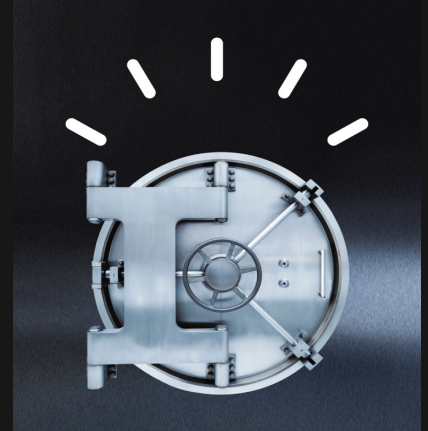
Customer Challenge
- 7,000 suppliers all using AS2 to transfer their EDI documents
- Need to ensure that their EDI documents are not interrupted by expired an expired AS2 certificate or password

By the Numbers
- Update AS2 certificates for all suppliers every two years
- Currently update passwords for their B2B solution once a year; new mandate from security team required password updates every 90 days (4 X per year)
- **Total touches = 31,500 per year**
- Each manual interaction to update certificate or password takes 30 minutes, or approximately 15,750 hours per year (7 – 8 person years)

Current Process and Desired Solution
- Customer currently manages these updates through a spreadsheet and work with their partners to update manually
- Manual process of updating passwords becoming a privacy and process compliance issue
- **Need a secure no-touch credential management solution**

Supplier EDI Onboarding

Customer Challenge
- Consumer Packaged Goods manufacturer needs to add new suppliers to diversify their supplier base
- They also need to expand the current base documents traded (PO, ASN, and Invoice) with 75% of the supplier base to create a better view into the supply chain process

By the Numbers
- 4,000 existing suppliers
- Add additional 1,000 suppliers over the next year (10 hours per supplier)
- Three additional documents (PO Ack, PO Change, Remit Advice) required for 3,000 suppliers (6 hours per supplier)
- Onboarding and document expansion = 28,000 hours (13 – 14 person years)

Current Process and Desired Solution
- Customer currently manages onboarding and document testing through spreadsheets, word documents, emails and phone calls
- **Need an automated process to not only onboard new suppliers, but also automate the document testing process where the supplier works through testing their maps until they are successful and validated**

New AS2 & EDI Partner Onboarding Process

IBM

- Rollout onboard campaign

- Partner logs in & confirms contact info
- Selects protocol options
- Selects EDI standards
- Selects EDI transactions
- Provides AS2 details

- Select internal application
- Validates / uploads supplied EDI envelopes
- Select AS2 organization profile
- Select file processing options

- Partner receives / tests AS2 details
- Partner uploads sample files
- Select internal application
- Approves new partner

ACME Corp

PEM

B2Bi/SFG

PEM
Administrative
Sponsor

Cabela's

New Business Partner
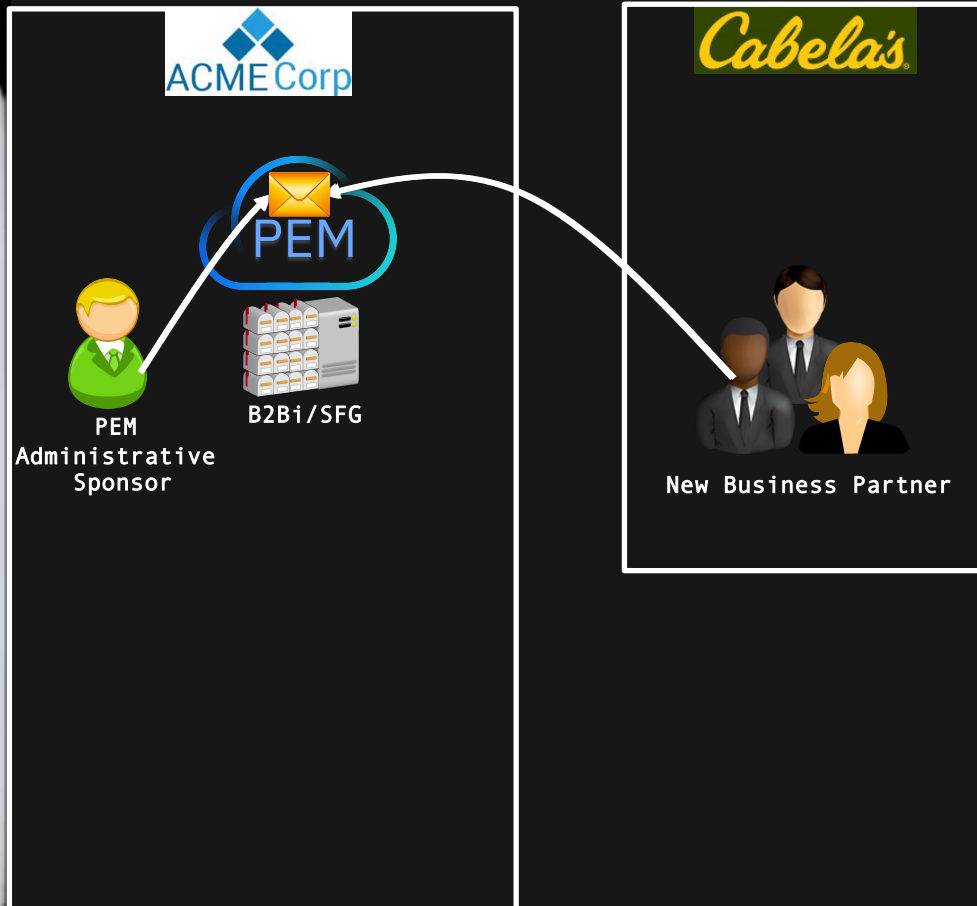
Certificate Expiration Process

- Rolls out expiry campaign
- Selects type of expiry to be included
- Specifies due date for campaign completion
- Selects soon-to-be expired partners

- Confirms account to be updated
- Selects non-production / production
- Select Host Name / certificate to update
- Uploads new certificate

ACME Corp

PEM

PEM Administrative Sponsor

B2Bi/SFG

Cabela's

New Business Partner

IBM
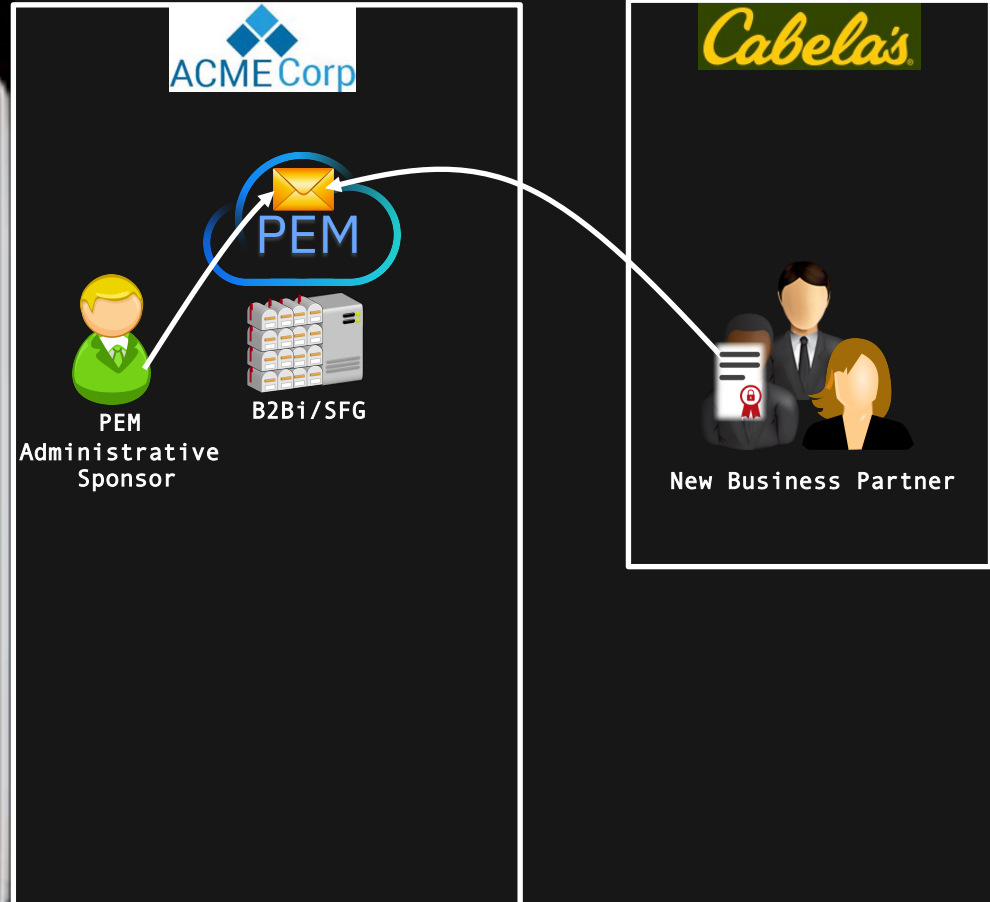
Additional Capabilities with new PEM offering

IBM

New Partner

Combined Onboarding Campaign
- ✓ One activity to handle both connectivity and transformation onboarding

Onboard EDI Transactions
- ✓ Support for ANSI X12, EDIFACT, XML, and Flat-file formats
- ✓ Envelope Configuration utility
- ✓ Document Type updates – Add, update, or remove document types to existing EDI setups

Continual Touch

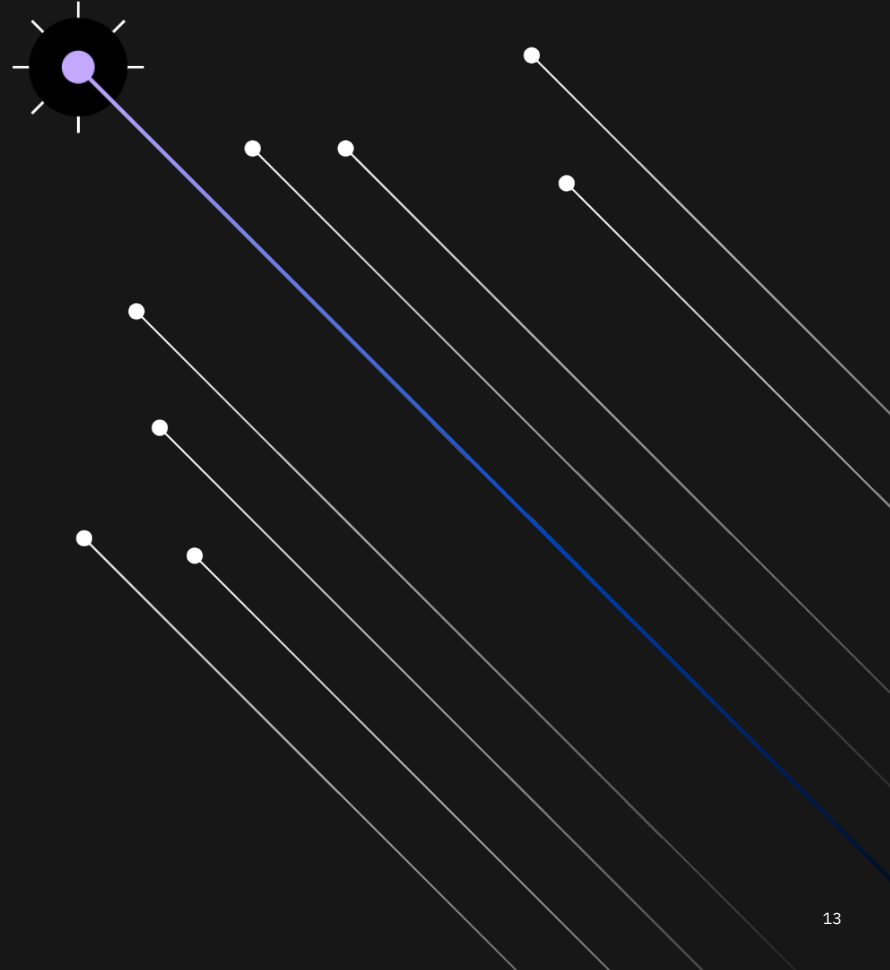- ✓ **Certificate, Key, and Password Self-Service Update**
  - ✓ Detect expiring SSL Certificates, AS2 Certificates, SSH Keys, and Passwords and initiate activity to update
- ✓ **Contact Verification**
  - ✓ Set a pre-set timeframe for contact refresh

Migration/Operations

- ✓ **Automate migration of code to higher environments**

- ✓ **Decommission trading partners in PEM and SFG/B2Bi**

- ✓ **Custom Table Support**

Thank you

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