

Sterling Supplier Portal



Overview Guide

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Note

Before using this information and the product it supports, read the information in "Notices" on page 15.

This edition applies to the 11 November 2012 release of IBM Sterling Supplier Portal and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. IBM Sterling Supplier Portal - An Overview

IBM® Sterling Supplier Portal provides a web portal for businesses wanting to integrate with non EDI trading partners. This integration is achieved by enabling document-based transactions between sponsors (buyers) and partners (suppliers) through web communities. As part of these web trading communities, sponsors can transact documents in EDI, while their non EDI trading partners send and receive documents through web-based forms using a web browser.

Note: EDI capable suppliers can use Sterling Supplier Portal for the Vendor Compliance feature. They can register as a partner to a Chargeback Only community and can access their chargeback documents as well as review the Non-compliance Summary report.

A sponsor creates a trading community and configures it with certain business rules. The sponsor then invites partners to join the community. partners can become partners of multiple sponsors, based on the invitations issued by the sponsors.

Sponsors use the IBM® Sterling B2B Collaboration Network to route the Purchase Orders (POs) that they send to partners as web forms. To review and process POs, partners receive information through their Dashboard about the tasks they should perform next, as well as overdue tasks.

Sponsors can provide their brand logo, validation rules, and select a user interface layout for the following forms:

- Purchase Order (PO)
- Acknowledgement
- Advance Shipment Notice (ASN)
- Invoice

Partners enter the required information into the Acknowledgement, Advance Shipment Notification (ASN), and Invoice forms to be sent to the sponsor. Sterling Supplier Portal supports documents that are in American National Standards Institute (ANSI) X12, Electronic Data Interchange for Administration, Commerce, and Transport (EDIFACT), and Sterling XML formats.

Major Features

A sponsor can configure a community and set up an account for carrier integration to allow generation of carrier labels by partners. For such communities, the sponsor can provide the dimensions of the default container for the community. A partner can generate a tracking number and print a carrier label for a shipment that is created in response to a PO. The partner can create only one container for the entire shipment. The carrier label will be placed on the container for the shipment.

A sponsor can configure a community to make the task of packing items in containers and generating container labels mandatory for partners. The sponsor can also mandate whether the partners must use cases, pallets, or both to pack the items in the shipment. The partners cannot send the shipment without packing the items in the container specified by the sponsor, or generate the corresponding

container labels. If the sponsor does not configure a community to mandate that partners should pack items in containers and generate container labels, the partners can still choose to pack an order or a shipment in cases, pallets, or both and generate the corresponding container labels. Sterling Supplier Portal provides a default container label in the GS1-128 format.

If the sponsor is also subscribed to IBM® Sterling Supply Chain Visibility, updated trading partner information is posted to Sterling Supply Chain Visibility when a partner joins the Sterling Supplier Portal community. This enables sponsors to generate reports, using Sterling Supply Chain Visibility, to compare the relative performance of various suppliers in a supplier group.

A sponsor who is subscribed to IBM® Sterling Transportation Management System can plan load details for partners. If the sponsor has performed all the required configurations to enable route planning, the sponsor can send orders to partners mandating that the shipments for those orders require route planning. Once they receive the orders, the partners will need to send such shipments for route planning. The sponsor can then plan a load for this order, and send the route plan back to the partner containing information such as carrier details, pick up time, and so on.

Chapter 2. Sterling Supplier Portal Users

Sterling Supplier Portal is used to facilitate electronic trading communities used by a sponsor organization and multiple partner organizations.

Sponsor

In Sterling Supplier Portal, a sponsor is a buyer organization that maintains a trading community. A sponsor can perform the following tasks:

- Create web communities and set the document choreography, business rules, EDI specifications, display, and data formats for each web community.
- Invite partners to join a web community, and logically group partners based on business rules.
- Configure their communities to display documents to partners as web forms with the sponsor's logo and branding.

Partner

In Sterling Supplier Portal, a partner is an organization that supplies products to a sponsor. A partner gets onboarded to the system after completing the registration process and responding to the invitation. A partner can perform the following:

- View new orders and changed orders.
- Acknowledge, ship, and invoice orders, if the community configuration permits.
- Keep track of next tasks, overdue tasks, and open orders.
- Become buyer-compliant and gain more marketing opportunities by joining other trading communities.

Chapter 3. Features Overview

IBM Sterling Supplier Portal provides a web portal for businesses wanting to integrate with non EDI trading partners. This topic provides a brief description of the Sterling Supplier Portal application features.

Globalization Support

Sterling Supplier Portal enables sponsors to communicate with the suppliers in a selected language. Partners (suppliers) can view the community configuration details in the language selected by their sponsor.

Manage Communities and Partners (Sponsor Task)

A community that is created by a sponsor is a logical grouping of partners based on the business and validation rules configured by the sponsor. Sponsors create campaigns and send invitations to trading partners to join a web community.

A campaign can be either Static or Dynamic. In the case of Static campaigns, sponsors cannot add partners to the campaign after the campaign is notified. However, for Dynamic campaigns, partners can be added to the campaign even after the campaign is notified. Sponsors can export the list of partners who have been added to a campaign and save the list in Comma Separated Values (CSV) format. Sponsors can also resend the email invitation to those invitees who did not respond to the invitation to join a community.

A supplier can also become a partner of multiple sponsors by accepting invitations from multiple sponsors to join communities.

Sponsors can perform the following:

- Create a partner in the system.
- Create a community.
- Configure a community as a web community and perform additional configurations to the web community.
- Add partners to a community or remove partners from a community.
- Post messages within a community.
- Edit an existing community.
- View partner details.

When sponsors configure their community as a web community, they must select a sequence of Electronic Data Interchange (EDI) documents to set the rules for their community. This sequence of EDI documents is termed as the choreography for that community.

Generate Reports (Sponsor Task)

Sterling Supplier Portal enables sponsors to generate reports in order to analyze the documents used to transact with suppliers.

Sponsors can generate the following reports:

- Aged Unread Report

- Form Activity Report
- Mail Box Summary Report
- Interface Summary Report
- Error Details Report

Aged Unread Report

Sponsors can generate a report of the documents sent to the suppliers that are in Unread status. This report also displays information about the duration for which each document has been in Unread status.

Form Activity Report

Sponsors can generate a report of the documents that are exchanged with the suppliers. This report groups the documents based on the document type. This report also displays the total number of documents used in a transaction.

Mail Box Summary Report

Sponsors can generate a report pertaining to the supplier mail box. This report also shows whether documents are outbound or inbound, with information about the document type and their description. This report also shows whether an inbound document is Read or Unread.

Interface Summary Report

Sponsors can view the interface summary report that provides a summary of information pertaining to both the incoming and outgoing documents that were processed within a specific time period, ordered by the dates on which the documents were processed. The interface summary information is displayed as a table as well as a chart.

This summary displays a list of documents that were processed within the specified time period, the dates on which the documents were processed, the number of documents that were processed successfully, the number of documents that failed processing, and the percentage of documents that failed processing.

Sponsors can also view the error summary report that provides a list of all the errors that occurred for a document that was processed on a specific date. This report provides the error codes, short descriptions, and explanations for each of the errors that occurred while the document was being processed. This report also provides the number of documents that failed processing because of the same error.

Error Details Report

The interface error details report enables sponsors to drill into the details of each document failure. You can find errors based on date, document type, error code, partner ID (supplier ID), or one of the many document-specific reference fields.

Review and Process Orders (Partner Task)

Sterling Supplier Portal enables partners to review and process new Purchase Orders (POs) and Change Purchase Orders sent by their sponsors. These documents can be reviewed and processed from the Dashboard through various panels.

When a partner receives a PO or Change PO from a sponsor, the document is listed adjacent to **New Communications** in the Overview panel. The partner can then review the order and mark the document as read to enable it for processing. After the order is marked as read, a list of tasks that a partner must complete in order to fulfill the open order within the specified number of days is displayed in the Next Tasks panel. These tasks are displayed based on the choreography selected for the community to which the partner belongs.

The partner can perform the following tasks pertaining to a PO:

- Acknowledge an order
- Invoice an order
- Ship an order
- Invoice a shipment
- View the payments for an order

If certain tasks are not completed within the completion due dates, these tasks are added to the list of overdue tasks in the Overdue Tasks panel.

Partners can also view a comprehensive view of POs that they receive from different Sponsors in the Open Orders panel of the Dashboard.

Partial Acknowledgement

The Partial Acknowledgement feature enables the partners to partially acknowledge an order depending on community configuration.

The acknowledgment can be sent in multiple steps by adding part of the quantity at a time. The partially acknowledged quantity should satisfy the configured business rules. You can also exclude some of the order lines while sending an acknowledgment. The acknowledgment sent to your sponsor will not contain the excluded orderlines.

Vendor Compliance

The Vendor Compliance is an optional module that allows Sterling Supplier Portal sponsors to set up and enforce compliance levels with you, their supplier.

A sponsor who is subscribed to Sterling Supply Chain Visibility can define vendor compliance rules. These rules will result in generating the chargebacks against the partner and when this happens you can view those chargeback records in Sterling Supplier Portal. The Sterling Supply Chain Visibility application can send new chargebacks, or updates/cancellations to the existing chargebacks.

When a noncompliance event occurs, Sterling Supply Chain Visibility facilitates a process that brings a resolution within a predefined time frame, called the mediation period. At the conclusion, the Sterling Supply Chain Visibility

application can route a final chargeback document to a Buyer ERP system. A document sent from a Buyer ERP system to Sterling Supply Chain Visibility can also trigger a noncompliance event.

EDI Capable Suppliers

EDI capable suppliers can use Sterling Supplier Portal for the Vendor Compliance feature. They can register as a partner to a Chargeback Only community and access their chargeback documents as well as review the non-compliance summary report.

Ship From Locations

Sterling Supplier Portal enables you to configure the ship from locations that can be used by sponsors and partners. Partners and sponsors can create their versions of ship from locations.

Sponsors can configure the ship from locations in their system. This helps to prevent errors while receiving the **Advance Shipment Notifications** (ASNs) from their partners. While creating a community, the sponsor can set the ship from location option for their partners to any of the following rules:

- Any location
- Supplier created locations approved by their sponsors
- Locations specified by their sponsors

While creating a shipment, a list of ship from locations are available to the partner based on the community configuration by their sponsor. When a partner adds, modifies, or deletes the ship from location details, its sponsor is notified of the change. Sponsors can also view the ship from location details of their partners.

Configure PO Print

Sterling Supplier Portal enables the sponsors to display the Requested Shipment and Delivery Date range in the **PO Print** option.

About this task

Certain configurations have to be performed in order to display the date ranges, for which you must contact the IBM support team.

Configure Replace Order

Sterling Supplier Portal enables the sponsors to replace an existing order.

About this task

After you perform the replace order configuration and you create an order that already exists in the system, the document is treated as a change order. By default the replace order option is not available for a new community. You should perform some additional configuration to replace an order. For more information on configuring replace order, contact the IBM Support team.

Service Agent

Sterling Supplier Portal also supports the concept of Service Agents, who are third party vendors.

About this task

The Service Agents are individuals that supply products to the sponsors and handle multiple suppliers. A sponsor can have more than one Service Agent that cater to a group of suppliers. In Sterling Supplier Portal, the sponsor company is the parent company of a Service Agent. The Service Agent can view the chargeback data and the related documents for all the suppliers pertaining to it.

Chapter 4. Sterling Supplier Portal Advantage

Sponsors (buyers) are streamlining their business processes and reducing manual processes. Small and Medium Business (SMB) partners typically lack a way to provide their data in an electronic format and must rely on manual processes. Manual processes are error-prone and expensive.

The following are the common challenges that businesses face:

- Lack of cost-effective means through which enterprises can reach their smaller trading partners, which is necessary to accelerate the supply chain.
- No consolidated solution for SMBs to facilitate compliance with buyer initiatives.
- Lack of tools to track performance effectively, and improve the same with supplier score cards.

In such a scenario, Sterling Supplier Portal provides a documents-based collaborative solution to be used between sponsors and partners.

Sterling Supplier Portal enables a sponsor to create a community and on-board partners rapidly. This involves the following:

- Creating and configuring web communities by sponsors.
- Registering Partners to join new communities.

Sponsors can use the existing templates for forms and configure various business rules, fields to be displayed, and so on.

Sterling Supplier Portal provides application-based integration, which enables tighter integration of Sterling Supplier Portal with Sterling B2B Collaboration Network. Sterling Supplier Portal integrates with Sterling Transportation Management System to enable route planning. Sponsors can use Sterling Transportation Management System to plan a load for the shipments sent by their partners. A sponsor configures a Vendor ID for each partner in Sterling Transportation Management System, which should be same as the partner ID that is entered by the sponsor when creating that partner.

To summarize, Sterling Supplier Portal provides the following:

- Web presentation to enable smaller trading partners to become buyer-compliant.
- Solution that allows sponsors to set up communities with certain business rules, select and configure user interface templates for forms, branding, and so on.
- Task-based Dashboard that enables trading partners to respond quickly and manage the supply chain better.
- Configure a business calendar for the sponsor organization, and specify non-working days such as holidays and special events. For all the partners, the date-based alerts are raised considering only the working days that have been defined in this business calendar.

Chapter 5. Service Level Offering Policy

Service levels are defined based on two categories: Service Level Objectives and Service Level Agreements.

Definitions

For a service level to be included, it must meet the criteria of measurable, trackable, monitorable, and defensible, as determined by the B2B Services PLM and Cloud Services Operations group.

Service Level Objectives (SLO)

Service levels that are defined as part of the overall support plan of IBM B2B Services that govern the processes, support levels, and service levels that IBM strives to achieve with their client.

Threshold Metrics

The specific measures, by service level, that define the levels of performance by which IBM will hold itself accountable based on the definitions of Service Level Objectives and Service Level Agreements.

Metric Formula

The specific calculation equation created to effectively measure the threshold metric.

Service Level Objectives Categories and Metric

This section provides the definitions of the Service Levels for Up Time.

Table 1. Service Level Objectives Categories and Metric

Metric	Metric Category	Definition	Threshold Metric	Metric Formula
Production Availability	Up Time	<p>Up Time is the period of time during which the production system processing for the service is available for all users of the service for which they have appropriate permissions.</p> <p>Up Time does not include the period of time when the Service is not available as a result of: planned system downtime, force Majeure, problems with Customer or third party applications, equipment or data, customer or third party acts or omissions, failure to adhere to required system configurations and supported platforms, service interruptions, or disruptions caused by other services performed on behalf of the client based on an SOW</p>	Up Time = % of Attainment of Goal	Minutes Service is Available During Month/Minutes in Month less Up Time exclusions

SLO Requirement for Uptime

Table 2. SLO Requirement for Uptime

Metric Category	SLO Threshold Metric
Up Time	Avg. 99.9% per month

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