ESI Help home page

Welcome section

ESI (e-Collaboration Electronic supply-chain Interlock) is a on-demand web based suite of applications that enhances communication and collaboration between IBM and its partners. Automatic server to server reporting and distribution processes along with robust multi-layered security to further leverage ESI's collaboration capabilities

Find help information about ESI under the additional tabs.

- **Registration:** Includes instructions on how to register a new user id and request access to ESI application.
- **Processes**: Provides information on how to create documents for the different ESI processes.
- **FAQs**: Frequently Asked Questions.

For more information about ESI Application, visit the ESI Overview
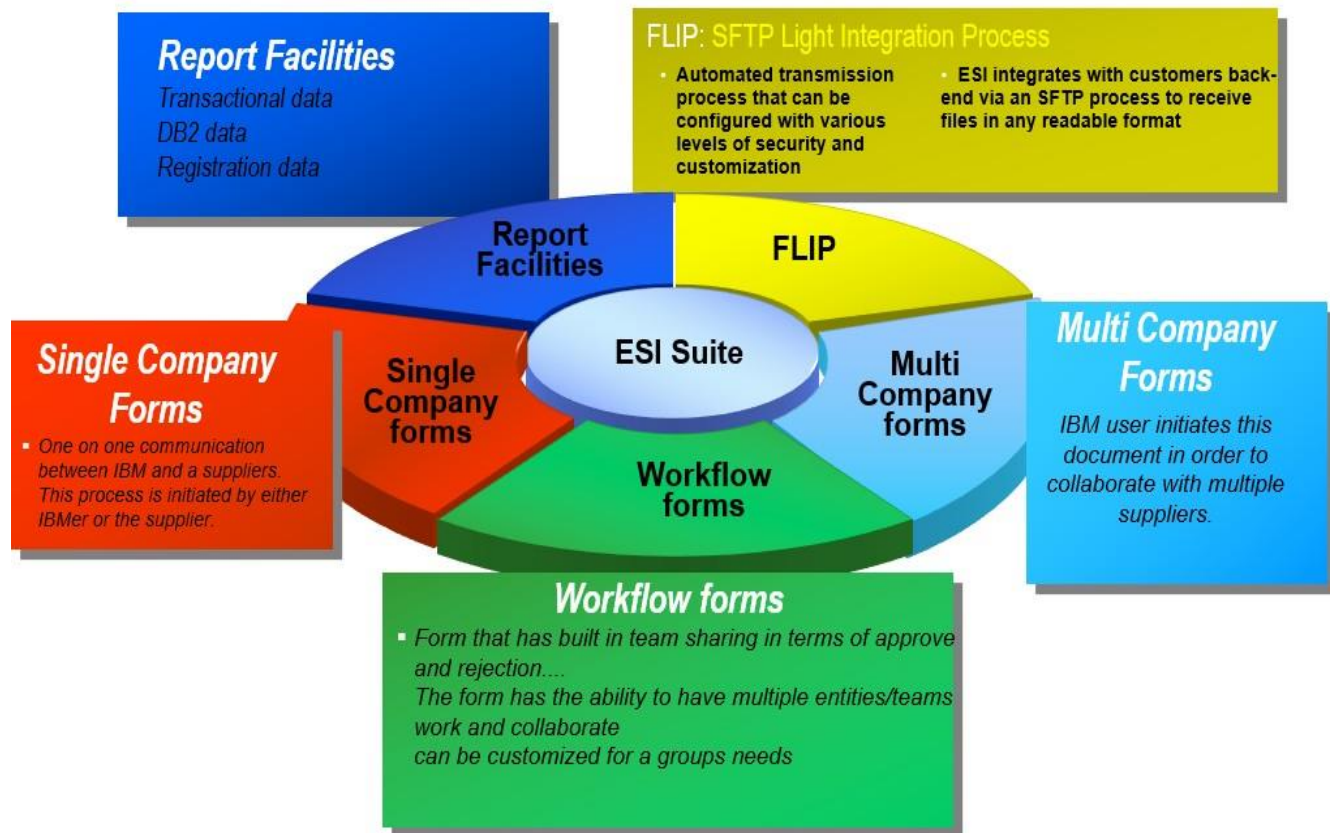
ESI Overview

What is ESI?

ESI (e-Collaboration Electronic supply-chain Interlock) is an on-demand web-based suite of applications that enhances communication and collaboration between IBM and its partners. Automatic server to server reporting and distribution processes along with robust multi-layered security to further leverage ESI's collaboration capabilities

ESI enables IBM to securely exchange any type of business, engineering and workflow data between suppliers and partners.

ESI's collaboration capabilities are enabled through four basics services: Workflow tasks, Savings & Forecast, File Transfer Automation, Generic tasks and Reporting Facilities

ESI's 5 foundational services

ESI's 5 foundational services

Report Facilities

Transactional data
DB2 data
Registration data

FLIP: SFTP Light Integration Process

- Automated transmission process that can be configured with various levels of security and customization

- ESI integrates with customers back-end via an SFTP process to receive files in any readable format

Single Company Forms

- One on one communication between IBM and a suppliers. This process is initiated by either IBMer or the supplier.

Multi Company Forms

IBM user initiates this document in order to collaborate with multiple suppliers.

Report Facilities

FLIP

ESI Suite

Single Company forms

Multi Company forms

Workflow forms

Workflow forms

- Form that has built in team sharing in terms of approve and rejection....
The form has the ability to have multiple entities/teams work and collaborate
can be customized for a groups needs

ESI Overview

Web based Application

- Internet Explorer
- Firefox
- Netscape

On Demand application

- Componentized application
- Dynamic architecture provides ability to add new functions at a low cost
- Customized tool

Back end integration
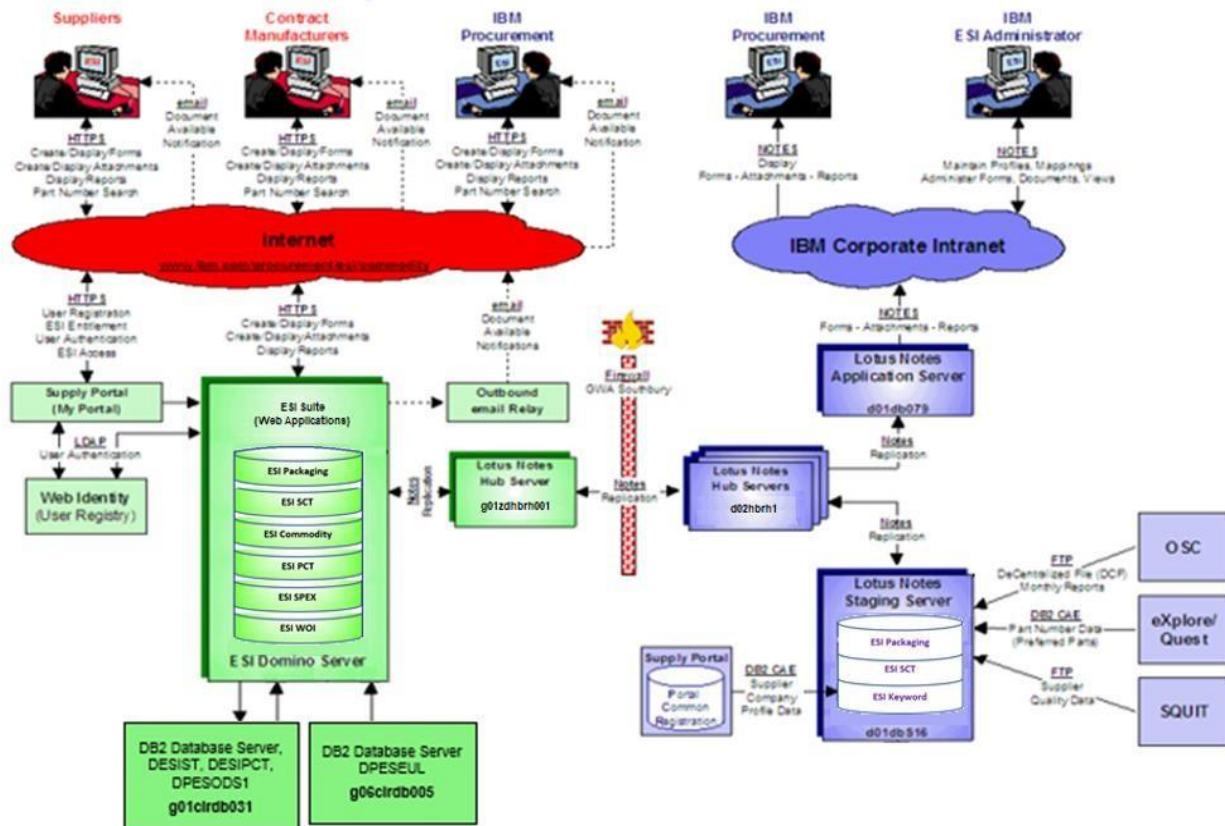
- Supply Portal
- DCF
- BDW
- SQUIT

Storage

- DB2 tables
- Notes Domino database storage
- Agents can update data

Workflow application

- Enhances communication between IBM and its partners
- E-Collaboration tool
- Allows IBMers to exchange data with partners (FLIP)

ESI System Architecture-Functional Overview

ESI Suite of Applications

- **ESI Commodity**
- **ESI Packaging**
- **ESI Supplier Communication Tool (SCT)**
- **ESI Procurement Contribution Tool (PCT)**
- **ESI SPEX**
- **ESI GDSS (WOI)**

ESI Commodity

Overview: It is on-demand web-based application used to facilitate electronic interaction between IBM and its suppliers/CMs for key business processes. It encompasses processes such as RFIs, RFQs, Award, qualifications, contracts, pricing, forecasting, roadmaps, specifications, general communications, etc. It provides online data access with update capability, providing its users with more timely, accurate, and reliable information. Used by IBM Global Procurement and other IBM organizations to share information with other IBMers, suppliers, and Contract Manufacturers about commodities IBM procures.
Commodity Management process includes
- Replenishment/Fulfillment, Sourcing
- Cost Analysis and Management
- Supply Capability Planning

- Enhances communication and collaboration between IBM and its partners
- Enables IBM to securely exchange any type of business, engineering and workflow data between suppliers, partners and contract manufacturers
- Single and multi-company forms
- Hybrid storage architecture (Domino and Db2)
- Dynamic architecture provides ability add new function at a low cost
- Common web interface for IBMers and non-IBM users
- IBM and supplier users' access ESI outside the firewall and authenticate against Web Identity (WI) directory
- Data retention controls, providing a single point of information retention for auditability
- It is deployed in AHE environment
- Integrates with eXplore back end system for part data
- Interfaces with Part Number Data Base / Part Number Ref Tool
- Interfaces with DPL (denied party list)
- Interfaces with third party reporting tools (i.e. Brio)

ESI Commodity is a collection of customized ready to use collaboration components including: Generic forms, Report Facilities, File Transfer automation and Workflow tasks.

Generic forms:

Generic Forms are designed to improve collaborative capabilities by providing communication between IBMer and Suppliers through two types of generic forms:

❖ **Single Company Form**
- One on one communication between IBM and a supplier.
- This process is initiated by either IBMer or the supplier.
- Responses to the main document can be created by a supplier and an IBMer.

❖ **Multi company form**
- Only an IBM user initiates this document in order to collaborate with multiple suppliers.
- Responses to the main document can be created by a supplier and an IBMer.

Features
- E-mail notification: users can choose to send instant e-mail with link to the document at any time while creating or updating a document.
- Archive options: documents can be archived automatically following esi configuration or users can archive or unarchive manually a document.
- Responses to the main document can be created by a supplier and an IBMer. Parent response hierarchy is maintained between collaborating parties.

Benefits
- Quick and easy to implement and can be used by any process.
- Instant access to documents by IBM and its suppliers.
- Post documents in the same method by both IBM and suppliers.
- Instant e-mails provide expedient, efficient, and secure communication.
- Paperless, real-time, and secure system that captures and stores IBM/supplier communication.

File transfer automation (FLIP -FTP Light integration process)
The ESI file transfer automation process is a customized component that enables users or applications with varying back-end to transmit data to their suppliers through FTP.

Features
- Two-way communication path (to/from ESI).
- Receives files in any readable format.
- It can massage data before publishing files on the web.
- Simple way to setup business rules for massaging data.
- Data posted through on the web has appropriate security built-in to protect documents.
- FLIP engine can be customized with various options such as send E-mail, create a new or update existing documents, select security type, group, task and subject.

Benefits
- This process can be made available with little or no code change.
- Server to server file transfer automation outside the intranet firewall.
- Allows to publish documents on the web with the files as attachments.

Report facilities:
ESI's reporting facility gives users the ability to view data from different sources.

Features
- Transactional data can be viewed via ESI front end on documents created within the tool.
- View search: A search function that runs in a view scope.
- DPL (Denied Parties List) search: Users can search the database for persons/organizations with whom IBM cannot legally do business.
- Multi database search: A powerful search engine that can search for documents on multiple database within ESI.
- Selective data can be viewed via DB2 reports.
- Users can use BRIO reports to view DB2 data.
- Profile and authorization data can be viewed through the Supply Portal.
- Listing IBM Users (coordinators and regular users) within any council.
- Listing Supplier Users (coordinator and regular users) within any council.
- Verifying any User's existence and application access within the portal.-Checking the status of an Access Request submission.

Benefits
- An easy way to find any information.
- A search engine can be provided to retrieve data from a specific pre-defined process.
- Customizable reports can be built to massage data and extract metrics.

Workflow tasks
ESI provides users with the ability to automate, manage, and monitor people-based business processes through workflow form capability.

Features
- Track the progress of people-based business processes and tasks.
- Multiple levels of approvals and automatic notification.
- Profile and authorization data can be viewed through the Supply Portal.
- Automate repetitive, time-consuming business processes in an accurate, consistent fashion, following corporate guidelines and/or industry regulations.
- Workflow application development that integrates with existing ESI infrastructure.

Benefits
- An easy way to find information on workflow tasks.
- A search engine can be provided to retrieve data from a specific pre-defined process.
- Customizable reports can be built to massage data and extract metrics

Application: ESI Packaging

Overview: ESI Packaging is the compliance collection, certification, notification and audit repository for all WW packaging data. This application is used by the IBM worldwide Packaging Procurement and Engineering teams and IBM Suppliers.
It allows us to keep on top of new Environment requirements being thrust upon us at an ever-increasing pace (REACH, RoHS, Sustainable Managed Forests, etc.). One primary function of ESI Packaging is the online (Web) accessibility of all Packaging suppliers to declare and certify their environmental compliance annually directly via the internet.

Application: ESI Supplier Communication Tool (SCT)

Overview: SCT enables regular environmental communications between IBM and suppliers. High level functionality of the ESI communication tool is as follows: Create letter, send letter, Receive acknowledgement, Reporting functionality, Questionnaire capability where responses are stored and searchable.
Using Council-managed databases of Council and Supplier Contact information, and a letter composer which supports wild-card keyword substitution, SCT can send a personalized email to any number of selected Supplier Contacts for any number of selected Councils.

Application: ESI Procurement Contribution Tool (PCT)

Overview: ESI PCT is a web-based tool intended to collect and consolidate all the non-GPCA Cost Contribution (Cost Reductions and other Cost Benefits) driven by the Services and General Procurement organization.
It is a used to identify, register and track Savings opportunities between IBM and its partners. This application is available for internal (w3) users only.

- It allows the collection of actual and projected Cost Reductions and Cost Benefits against our commitment to CHQ.
- The intended users include buyers having to input local Cost Reductions / Benefits, Procurement management assessing integrity of inputs as well as progress toward goals, and Procurement staff analyzing inputs.

Application: ESI SPEX

Overview: SPEX or Supplier Part number EXchange is a workflow process to inform suppliers about changes made in IBM electronic components. Adds, deletions and modifications done daily by engineers in the eXplore application, is captured at night by a scheduled agent, which then send the data to ESI via ftp to be processed. A process and background enabling tool used by IBM Component Procurement Engineering to communicate the definition of both newly created IBM P/N's and changes to existing IBM P/N's to suppliers. Our suppliers are required to use the ESI system to review and approve new P/N drawings or EC's to existing P/N drawings.

How SPEX works

Step1: It reads the councils files, massage the data and updates a DB2 server. This is done by a java program that during the process also generates 2 output files in a csv format (csv = comma separated values).

Step2: Based on an E-mail mapping table in DB2, sends an E-mail to every registered user (by council, by supplier) with the two csv files generated in Step1 attached: first one contains all dataset while the second one contains adds/changes (if any). The E-mail also contains a link to the ESI Portal on the web

Step3: It runs on ESI Portal on the web and registers the supplier confirmation when he/she receives the E-mail and selects the link.

Step4: SPEX reads information (acknowledgements) from ESI Portal and generates statistical reports for the SPEX coordinators, showing who acknowledged on time (Green status) and who did late or even do not at all (Red status).

Application: ESI GDSS (WOI)

Overview: ESI GDSS integrates with PeS database in order to support a front end to search, present, view and optionally download digitally signed and/or stored invoices in XML format.

ESI Security

Overview: ESI's has a multi-layered security process where each group has its own tower and incorporates its own approval cycle and control level.

Approval cycle
- New user requests are routed through an approval cycle so that unauthorized users will not be granted access.
- The registration process goes through a specific approval cycle for each council
- ESI relies on Supply Portal to obtain the approval of the company coordinator to add or change a user's access privileges
- The authentication is done via Web Identity and it is maintained via Public Group Manager (PGM)
- The approval cycle can be customized for each council's needs

Access control
ESI has many levels of security to ensure that each company's data can only be viewed by authorized users.

Access control levels

Group/Council level:
One council or user group cannot see another council's data unless the council coordinator specifically approves this type of access.

Supplier/CM level:
One supplier cannot view another supplier's data based on strict security using a unique 10-digit supplier number.

Editor / Author / Reader level:
Each user is assigned different access levels based on what is approved by the company coordinator. Editors have all Author capabilities, plus they can edit other users' documents within the council. Authors can create documents, view documents, and edit only documents that they have created. Readers can only read documents within their council or company.
Document level ACL Council non-restricted: Document can be seen by all IBM users in the council and all supplier users.

Council restricted: Document can be seen by IBM council users authorized to see confidential documents and all supplier users who can see confidential documents.

Council-Person restricted: Document can be seen by IBM council users authorized to see confidential documents and all users selected in the 'Person list' field.

Person level:
Document can be seen only by users selected in the 'Person list' field.

Registration section:

1. **IBM and Lenovo user**
2. **Suppliers**

To gain access to ESI follow through the steps below.

1. Suppliers get a valid IBM Registration (Web Identity) ID. IBMers can login with intranet ID and password
2. Register to the required ESI Commodity council.
3. The request will go through the approval cycle.
4. Access the ESI Application.

Get a valid IBM Registration (Web Identity) ID for suppliers.

IBM registration is a generic IBM wide authentication directory that you need to register before you can access ESI. If you already have IR ID, skip the steps below:

ESI supplier registration information

Obtaining Access to ESI

1: Registration – Obtain ID and password

To get started, open the URL: Suppliers –

http://portal-external.mybluemix.net/
Step1: Registration –Obtaining ID and password

Click on Create an IBMid

Log in to IBM

IBMid   **Forgot IBMid?**

☐ Remember me ⓘ

Continue

Don't have an account? Create an IBMid

Need help? Contact the IBMid help desk

**Step2: Registration –Obtaining ID
and password (Continued)**

Enter the mail id and all the details then click on next button. You will receive a 7digit code
to your mail id

1. Account information

E-mail ⓘ
Your email address will become your IBMid, which you'll use to log into IBM.com.

bsowjanya.ragothaman@gmail.com   ✓

We'll send you a 7 digit code that you'll use to verify your email in step 2.

First name   Last name

Baby Sowjanya   R

Password

●●●●●●●●●●●| 👁̸

– 8 characters minimum   – One uppercase character
– One lowercase character   – One number

Country or region of residence

India

Enter the verification code in step2 then click on create account button

2. Verify email

We emailed a 7 digit code to
bsowjanya.ragothaman@gmail.com

This code will expire in 30 minutes.

Verification token

A verification code is required in order to create an account.

Didn't receive the email? Check your spam filter for an
email from ibmacct@iam.ibm.com.

Resend code

IBM may use my contact data to keep me informed of products,
services and offerings:

☑ by email

You can withdraw your marketing consent at any time by sending an
email to netsupp@us.ibm.com. Also you may unsubscribe from
receiving marketing emails by clicking the unsubscribe link in each
such email.

Verification token

9075243

Didn't receive the email? Check your spam filter for an email from ibmacct@iam.ibm.com.

Resend code

IBM may use my contact data to keep me informed of products, services and offerings:

☑ by email

You can withdraw your marketing consent at any time by sending an email to netsupp@us.ibm.com. Also you may unsubscribe from receiving marketing emails by clicking the unsubscribe link in each such email.

More information on our processing can be found in the IBM Privacy Statement. By submitting this form, I acknowledge that I have read and understand the IBM Privacy Statement.

I accept the product Terms and Conditions of this registration form.

Create account

A popup appears click on proceed

Why IBM needs your data	∨
How your data was obtained	∨
How IBM uses your data	∨
How IBM protects your data	∨
How long we keep your data	∨
Your rights	∨

I acknowledge that I understand how IBM is using my Basic Personal Data and I am at least 16 years of age.

This document was last updated on 2018-06-04

Cancel   Proceed

•You will be a registered user to ESI application.

•Open browser and login to the below link using the mail id and password that you have entered during registration
Link-http://portal-external.mybluemix.net/

Requesting access to ESI for suppliers

GO TO http://portal-external.mybluemix.net/

Sign in to IBM

Enter IBMid   Forgot your IBMid?

esitest1@ibm.com   ✕

☐ Remember me ⓘ

Enter the registered IBM ID and click on continue

Continue

New? Create an IBMid.

Sign in to IBM

IBMid: **esitest1@ibm.com**

Password   Forgot your password?

••••••••

Enter the password and click on Sign in

Sign in

Use a different IBMid or email

Click on Enroll button and I Accept
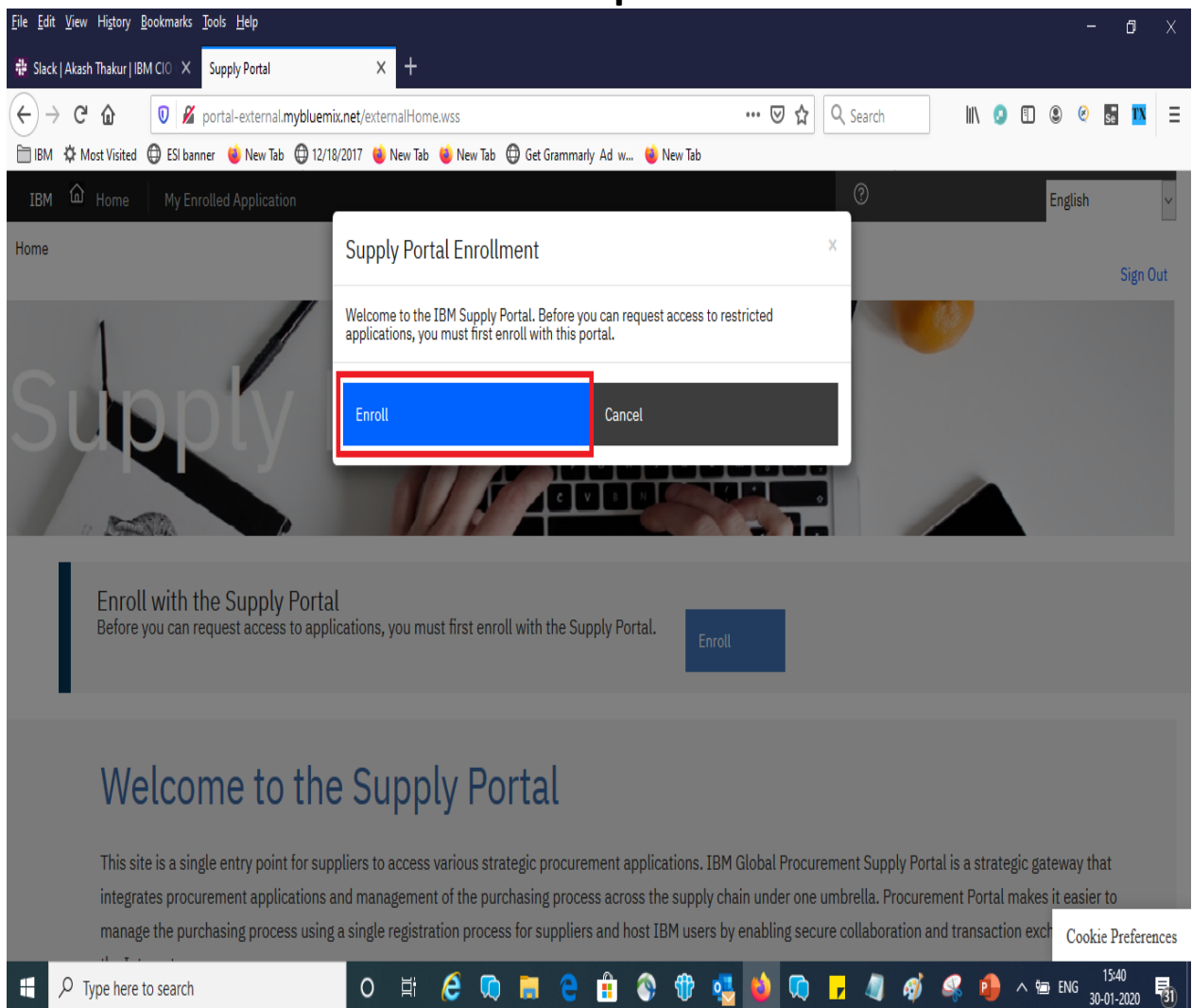
Supply Portal Terms

The Portal provides You with access to web-based features and e-procurement applications which support the electronic exchange of information through a single interface in a shared space environment over the Internet in a secure password protected environment. However, IBM does not guarantee uninterrupted, error-free, or secure access to the Portal. You are responsible for the control and distribution of any Portal User ID"s and passwords to end users. You will maintain security procedures to prevent unauthorized use of the Portal and any applications and features accessed through the Portal. It is Your responsibility to immediately request discontinuation of a User ID upon Your knowledge or belief that such User ID and/or password is or may be subject to a breach of confidentiality.

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IBM may immediately terminate your access to the Portal or associated applications and features with or without cause. These terms are governed by the laws of the state of New York.

You can proceed into the Portal by acknowledging your acceptance of these terms by clicking "I Accept" below.

| I ACCEPT | I DO NOT ACCEPT |

Enter the company name and click on GO button

My Menu - Enroll New User

To enroll a new user in the portal, complete the fields and click the Go button.

* Company Name:	ESI Test Co.	Go
* First name :	Baby Sowjanya	
Middle name :		
* Last name :	R	
* Email Address :	bsowjanya.ragothaman@gmail.co	

Select the application name from the drop down

* Company Name: ESI Test Co. Go

* First name : Baby Sowjanya

Middle name :

* Last name : R

* Email Address : bsowjanya.ragothaman@gmail.con

* Application : Select One ∧ (Select to proceed)

ESI
ESI - Packaging Application
ESI All
ESI Commodity
ESI Commodity-IBM web users

Contact   Privacy

Select the sub application as per your requirement

* First name :   Baby Sowjanya

Middle name :

* Last name :   R

* Email Address :   bsowjanya.ragothaman@gmail.co|

* Application :   ESI Commodity   ⌄   (Select to proceed)

* Select sub-application: Select One   ⌃   (Select to proceed)

| |
| Select One |
| ACCESSIBILITY |
| AOP |
| Business_Partner_RMA |
| CESAL |
| Cables-Connectors |
| Charlotte Supply-chain COC |

Contact   Privacy

FILL ALL THE MANDATORY FIELDS

* Select sub-application: OSC ∨   (Select to proceed)

* Desired Portal Role   Select One ∨   ⓘ

Job title :

Department :

Office phone# :

Pager# :

Office Fax# :

Street address :

Address line 2 :

SELECT THE ACCESS LEVEL AND SUB COMMODITY AS PER YOUR REQUIREMENT

* Country :

India ⌄

* Language preferences :

English ⌄

Access Level

Author ⌄ ⓘ

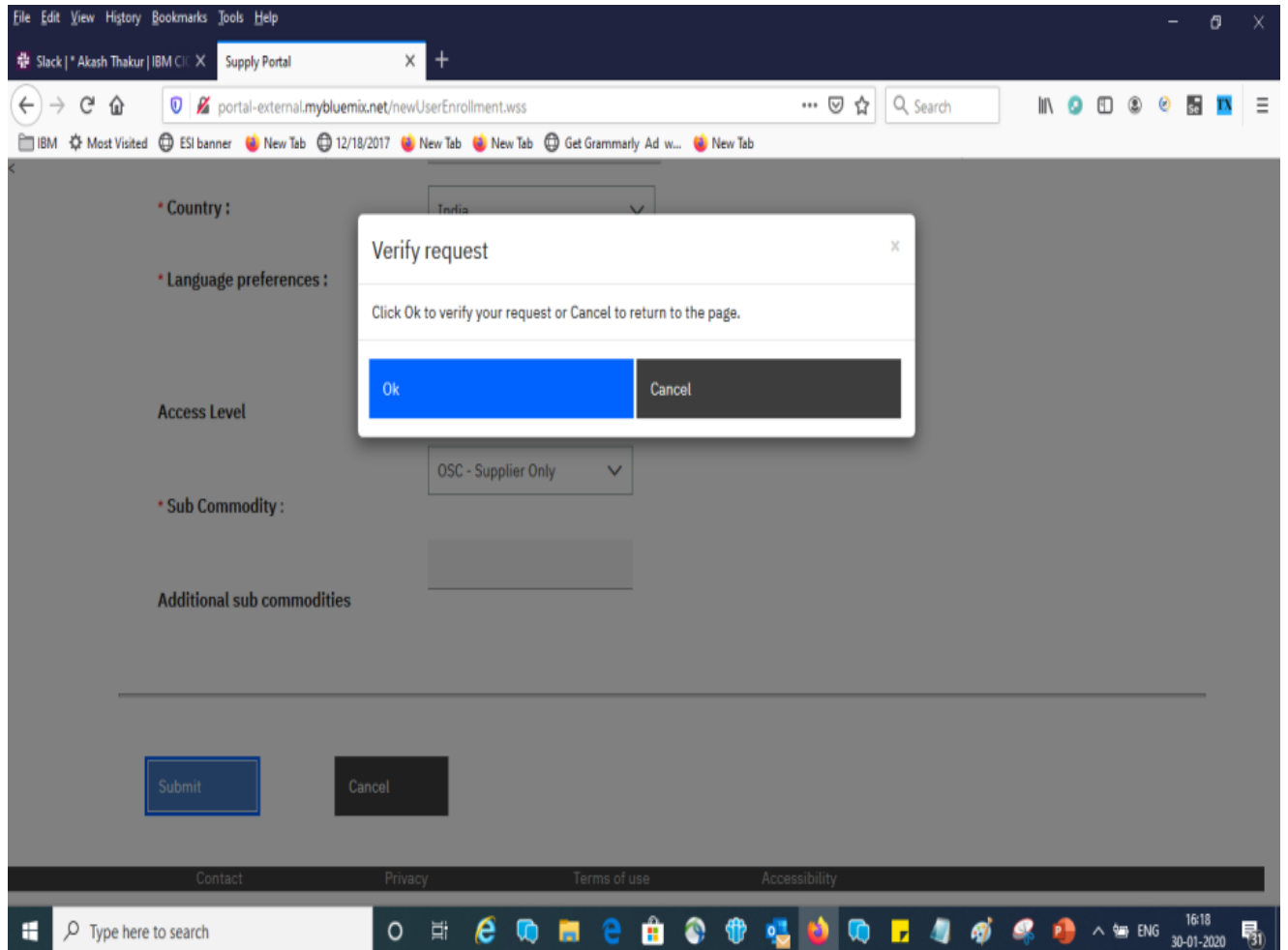* Sub Commodity :

OSC - Supplier Only ⌄

Additional sub commodities

Submit   Cancel

Click on ok button to confirm

Request will be successfully created. Please make a note of request number.

My Menu - Enroll New User

To enroll a new user in the portal, complete the fields and click the Go button.

✅ Request ID **243967** created successfully for your request.

* Company Name:	ESI Test Co.	Go
* First name :	Baby Sowjanya	
Middle name :		
* Last name :	R	
* Email Address :	bsowjanya.ragothaman@gmail.co	

Steps to submit the request to ESI for IBMERS

1. Go to the link https://portal-internal.w3ibm.mybluemix.net/portal/
2. Login with your ibm intranet Id and password.
3. Click on Enroll
4. Enter the company number 9000000001.
5. Then give your intranet Id
6. Click on GO wait until the page gets loaded.
7. For Application, select the ESI Commodity application IBM web users and sub application as per your requirement.
8. For desired portal role, select the Host Regular User role
9. Select the company type as customer and select requested access level and replication ID as NDB001. Click on submit.
10. Review your information and submit the request. If you want to edit any information you can go back and edit.

9. **The request will go through the approval cycle.**

Once your request is submitted it will be reviewed by the ESI Administrator. If the request is rejected, you will be sent an automatic E-mail with the reason the request was rejected. If your request is approved, it will automatically be forwarded to the company coordinator for their approval. After that the request will go to the ESI Administrator for their final approval and you will receive a Welcome E-mail.

10. **Access the ESI Application.**

Upon approval, to access the ESI Commodity application:
Go to Supply Portal and Enter your IR user id / password to get to your customized Portal page. Click on enroll and Select ESI Commodity-IBM Web users under the "Application" section. Refer to the Process tab of this material to find more information about a specific council / commodity.

Process section:

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