

**VDA**

Working Group Portal Management

**4993**

**Tasks and Responsibilities of Portal Managers**

This recommendation addresses the subject of portal management from the supplier perspective. A clear goal of this recommendation is the correct implementation of customer-specific requirements and thus enhancing the collaboration between customers and their suppliers through customer portals.

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## 1. Introduction

Today, vehicle manufacturers and their suppliers can look back on several years of Internet use in a B2B environment. It is considered one of the most important channels of communication between manufacturers and suppliers in virtually all business processes throughout the entire product life cycle and in different process chains. The first Internet marketplaces and platforms concepts emerged at the end of the nineties by automotive and tier 1 manufacturers. Their use has spread today beyond the confines of end producers and system manufacturers. For this reason, portals of n-tier suppliers and service providers of the industry are no longer a rarity, and the use of portals is now also established in other sectors.

There are objective and subjective limits to the application of standards and standardised interfaces in portal applications. Therefore, individual solutions are increasingly used. In addition, a further challenge is placed by the increasingly complex value chains between business partners. The coordination, organisation and management of customer-specific portals has therefore gained increased significance for suppliers.

From a supplier perspective, the use of customer portals generally goes hand in hand with operational and administrative operations. Operational activities in the daily business are mainly triggered by customer- and supplier-internal processes. These are clearly defined and tracked by the respective department of both partners. The definition of administrative operations presents a special challenge, and currently lacks a clear description. Suppliers here are faced with a variety of activities which do not affect their day-to-day business. Their relevance and the average time spent by suppliers are often unknown. The planning and provision of necessary resources is complicated. In the following, all administrative operations related to the use of customised portals are summarised under the term "portal management".

The increased risks and challenges from the use of customised portals are putting suppliers under increasing pressure to take action. In addition, diverging perceptions and corporate cultures of suppliers can lead to a variety of approaches to avoid negative effects. Due to expanding application areas of customer portals, the need for action has risen steadily in the last years.

The following recommendation was created by global portal providers – mainly vehicle manufacturers – and tier-n suppliers of the automotive industry with more than 10,000 employees, and addresses the subject of 'portal management'. This term has been defined by a description of administrative activities (and the time required by these). A clear goal of this recommendation is the correct implementation of customer-specific requirements and thus enhancing the collaboration between customers and their suppliers through customer portals.

## 2. Definitions

Administrator	To simplify the term, administrator was also used in the case of multiple administrators. An administrator is a person responsible for the management of user accounts and their rights. The tasks and duties of the administrator are defined by the portal operator in the terms of use of the portal.
Portal operator	A portal operator provides an application platform on the Internet or an Extranet for its selected business partners (suppliers, customers) to be able to exchange information with them. A portal operator can also be a commissioned service provider.
Supplier number	Code of a supplier or a supplier site (mostly provided as an index of the supplier number) provided by the customer or an external system (e.g., UPIK, D-U-N-S number)
Portal	An internet technology based communication platform which is characterised by the integration of applications, processes and services.
Portal application	A software solution through which the user accesses a portal. Portal applications can be general or department-specific (sales, logistics, quality, etc.). Within an application, the user can be granted different access permissions.
Customer portal	A portal provided by the customer or its service provider within a business relationship.
Web EDI	Web EDI is a portal application where a partner in an EDI relationship enters or processes data manually.
EDI	Electronic data interchange (EDI) refers to the structured data exchange between business partners using electronic transfer procedures.
Customer	In the context of this recommendation, a customer is understood to be the purchaser of deliveries and services.
Supplier	In the context of this recommendation, a supplier is understood to be the provider of deliveries and services.
Access authorisation	The user is granted permission for an application by the administrator of the respective company (if appropriate, in cooperation with the portal operator). Access permissions are ideally user-related, but in exceptional cases can also be group-related.
Portal management software	A software that supports certain internal processes or areas of portal management on the supplier side. These must be developed appropriately to the processes and organisational structures of the respective supplier.

### 3. Task areas

#### 3.1. Portal management, approval and testing of new portals

As already described in the introduction, suppliers are forced to use numerous customer portals. The number of portals used depends on the number of customers and their portal landscape. The portal management may be organised by the supplier with varying degrees of centralisation; irrespective of this, it must be integrated into the internal processes and organisation of the enterprise. This applies to diverse areas ranging from distribution, logistics and quality, to finance and development. A special task of portal management is to collaborate in the concept and process design for integration of the portal applications in the organisation.

To ensure compliant portal use by suppliers, some companies deploy specially created portal management software, into which the portal administration is often also integrated (user and rights administration, see section 3.4). The portal manager is responsible for the design, deployment, and administration of portal management software.

Suppliers are regularly confronted with new portals, new applications or changes to existing portals or applications. These requirements should be subjected to an approval process at the supplier, in which the respective departments are involved, including the legal and sales departments, depending on the case. In addition, requests should be coordinated across multiple sites to avoid stand-alone solutions at individual sites or subsidiaries. In addition to technical assessment, it is important to consider the legal issues associated with the use of the portals. The audit process for customer portal requests should be well-structured and organised, and test results should be documented. The role of the portal manager here is not only restricted to coordinating the process, but can also include responsibility for the decision, depending on the company.

Once the approval for a portal or application has been granted, the portal manager participates in initializing the portal, a process which may require the clarification of technical aspects, such as the implementation of certificates or other software. In addition, company-specific master data must often be managed. In many cases, new features or modifications are linked to user and rights management. The initialisation of a new customer portal is followed by the internal roll-out of the portal. To make best possible use of the portal applications, application-specific training of users is necessary. To this end, training material in the national language or in English must be provided or training courses organised.

Until a final decision is reached, an average duration of approximately 3 months can be assumed for the audit and approval process of customer portals. The test duration is heavily dependent on the effort required for coordination and number of internal and external interfaces to be integrated.

### 3.2. External & internal networks of experts

In this context, a network refers to the communication and exchange of knowledge and experience between acting persons. Internal and external networks of experts are a special form of internal and inter-company cooperation and form an organisational basis for the conversion of knowledge across organisational boundaries. Expert networks support both internal and external business processes, as well as the transfer of knowledge between stakeholders.

Today, all communication between companies in the supply chain can be mapped through customer portals. Due to the growing complexity of mapped business processes, the efforts associated with portal use are multiplied for the supplier. Expert networks are necessary for an effective use of customer portals (B2B portals) between suppliers, or between suppliers and customers. We therefore recommend establishing and developing appropriate links between customers and suppliers, as well as within the organisation. These information links can help to ensure that there is a similar level of information within the expert networks of the companies involved.

Such internal and external networks are of crucial importance, in particular for the tasks of portal management. Only a well-developed and effective network enables the responsible employees to collect all information and distribute it accordingly within the company or also externally.

#### Expert networks

... may only be used if honesty and integrity towards employees, customers, suppliers, portal operators and competitors is respected with regard to their commercial use.

... may only be used if all the applicable laws and regulations of countries which the network spans are adhered to.

... may not discriminate against or harass anyone.

... may not breach any applicable antitrust law.

#### Internal network of experts

An internal network of experts consist of members of an organisation, who can be in both horizontal and vertical relationship to each other. The existing organisational structure is supplemented or superimposed by such networks. Internal networks have the goal of supporting the functionality of portal management and can be established as described below, depending on the organisational structure.

- **Customer account manager network**

A point of contact for a customer's individual concerns is the corresponding customer account manager. Here all superordinate information provided by the portal can be combined, filtered and appropriately distributed in the organisation. Furthermore, the customer account manager can act as a central decision-maker for overarching customer-specific portal requirements (new portals, applications or portal conditions).

- **Contact partner network departments**

Regardless of customer requirements, an internal contact partner network for the various departments can be established. The aim of the network is to appropriately channel cross-customer requests that are made to the company. General topics and issues (quality, sales, finance, logistics, etc.) can be channelled via such a network to the relevant departments and processed there or forwarded by experts.

- **Key Users network**

In order to ensure consistent operation and implementation of portal and customer-specific processes, the installation of key users for frequently used portals or applications may be necessary. Key Users are employees specially trained for a process or portal application, who can selectively pass on their knowledge to other bodies or assist in any questions.

### **External network of experts**

An external network of experts can be viewed as a form of coordinated cooperation between several companies which are fully independent in legal, economic and formal terms. Such cooperation based on customer portals can have an impact on the whole value chain process. However, the cooperation can also be limited to one or a few functions or applications. The requirements concerning customer portals and associated processes of individual suppliers vary from customer to customer. However, the processes for all suppliers in a customer portal are identical. This cross-portal/cross-customer supplier comparison has the potential to identify best practices and communicate these via external networks to the person responsible for the customer. Through corresponding action by the customer, vulnerabilities in the processes can be identified and eliminated. For this purpose networks to other suppliers, customers, as well as national and international organisations and associations are extremely helpful. It is recommended to organise these activities in a neutral, compliance-oriented environment. At a German level, the Working Group E-12 of the VDA is available; at international level collaborations with Odette, AIAG and JAMA / JAPIA are desirable.



### 3.3. Services & support

Business operations with customers via portals involve multiple requirements of processual, technical or organisational nature. The persons concerned may be faced with a wide variety of customer requirements and a multitude of information.

In addition, portals often provide many services and functions that are not always intuitive and are the source of a wide range of errors. As a result, it often occurs that these services and features are not used as intended.

Sometimes, even the training and support offered by the customer/portal operator does not suffice to ensure proper execution of the operational processes in the portals and implementation of the requirements.

For example, problems can arise if the requirements/regulations are incomprehensible. What's more, in this environment there often are a wide variety of people involved, and extensive documentation must be viewed or consultations with customers and portal operators must be held. It is therefore easy to lose track of the tasks to be performed.

This poses a challenge for all parties involved, as these activities are not part of the daily operational tasks of the users, but are nevertheless essential to perform the services agreed with customers.

A primary approach to address these issues is to pool the expertise and ensure access to an overarching (accessible) base of expert knowledge (self-help). All aspects (internal and external) are taken into account and considered holistically.

All sorts of questions and issues in daily operation with portals therefore need to be systematically collected, processed and possibly coordinated. Own processes and/or systems may be required to organise and manage these. The active involvement of support points in customer/portal operators (where feasible) could possibly bring additional benefits. Help-seekers in turn can focus on their core tasks.

Optimisation potentials for portal operation as well as necessary support requirements can be identified and analysed, and then selectively mirrored to the customer/portal operator, enabling these to take appropriate action. Only in this way can potential synergy effects be largely exploited and duplicate work avoided.

Portals are stand-alone solutions which are not compatible with own systems. Here there are repeated media disruptions which must be prevented by human intervention. Such media disruptions interrupt the process, cause errors and can be arbitrarily complex as well as costly and time consuming. Available resources need to be spared, including by means of automation. The possibility of using already established standards (e.g. EDI) and various web services of customer/portal operators are generally preferable. Alternatively, digital agents can be used for routine activities (VDA recommendation 4981).

### 3.4. User and rights management

A careless user and rights management can quickly become a high security risk (cyber espionage, sabotage) for both portal users and operators, since many portals are accessible worldwide via a simple Internet connection. Careful and conscientious user management is necessary in order to minimise this risk.

Portal operators increasingly transfer administration tasks to user side, most commonly to suppliers.

Depending on the portal structure, the management of users and their rights can be performed at one or several levels; however, the most basic requirements are similar. The duties of the portal management include the following aspects of the user and rights management.

#### 3.4.1. Initial registration, new creation of users

As the result of a business process, a user initially makes a request – or is prompted to do so – to use one or more applications of a portal. For this purpose the user must be registered in the administration interface. Depending on the portal platform, this be done in different ways:

- Self-registration  
The user registers on the platform and applies as a user, possibly also for the applications, and enters specific data (e.g. contact details, rationale, supplier number(s), etc.) into a form or selects predefined values. The administrator is usually automatically notified and can accept this application in full or in part. The user therefore has a profile with certain privileges in the user management of the portal.
- User request from the administrator  
Depending on the requirements, the future user applies to the administrator informally or by using a prescribed form. The administrator accordingly creates a new user in the user management and assigns the required permissions.
- Application by a third party  
A third party (e.g. a portal operator, supervisor) proposes a user and its permissions to the administrator. The administrator accordingly creates a new user in the user management system and assigns the required permissions.

The administrator must consider certain criteria before approving or creating a user. Non-personalised user accounts should be avoided and are excluded in most terms of use, as is the disclosure of passwords to third parties. Portals managed by the owners themselves or by an authorised third parties, carry the risk that not all criteria in the approval process conform to the

requirements of the applying company. As a result, there is the possibility that unauthorised persons acquire access. In these cases it is recommended that the portal management carry out a user comparison at regular intervals, depending on the risk, together with the administrator of the portal platform. In addition, increased audit requirements for access should be agreed with the operator of the platform.

#### 3.4.2. Rights management

A portal platform provides access to at least one and usually several applications of a portal operator. The rights may vary depending on the portal (e.g. supplier number level, application level or privilege level according to different role models, ...).

The administrator must consider certain criteria before assigning rights to a user. These can be recorded in a checklist.

#### 3.4.3. User account management

On the basis of most terms of use, but also for reasons of the company's own data protection, it is the duty of an administrator to check registered users and their permissions in regular intervals. The aim of user verification on a portal is to accordingly adjust access permissions of users who have departed or taken other jobs within the company. The result of the user and rights verification can be the deletion, deactivation or reactivation of a user account.

Many supplier employees have, as described above, multiple user IDs, both per customer as well as cross-customer and cross-portal. According to experience, currently an average of about 5% of supplier employees work on external customer portals. Each user ID has further permissions for various applications in a customer portal. On average, each user ID has access to three such applications. The trend is a steady increase in the number of applications per portal.

### **3.5. Portal data management (master data ...)**

The users of the portals must register both as a person and company (or have themselves registered). Many customers request the collection of master data required for the portal operation (including corporate data/structure, product/service portfolio, certificates and contacts) and their continuous management (limited to changes). These form the basis for smooth, trouble-free handling of business operations through portals.

Incorrect information published on the portals can have adverse effects. As the use of portals often involves entering contractual agreements, this may even result in legal consequences.

A particular challenge is the in-house procurement and consolidation of the required master data as well as its manual transfer to the portals. Here time-consuming coordination with the relevant departments and sites may be required.

When mapping the company/corporate structure of the customer (usually initially by the responsible purchasing organisation), the master data relevant for the portal operation are also entered. Here customer-specific supplier numbers can be assigned or the data from Dun & Bradstreet (DUNS) can be used. Here, the portal management should be integrated to proactively avoid any discrepancies in portal operations.

A specific task of portal management can be the provision of up-to-date, high quality data to customers. Own processes and/or systems may be required to organise and manage these.