

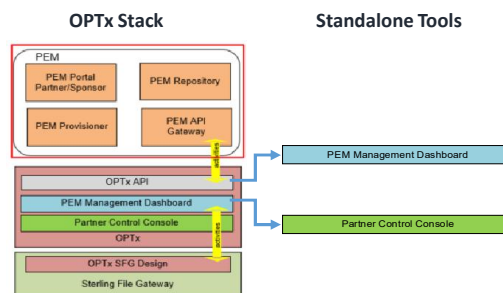
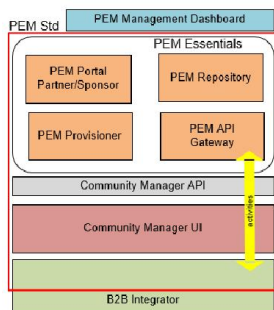


<p>PMD PEM Management Dashboard</p>	<p>Manage and Monitor IBM PEM Campaigns</p>
	<p>2023</p>
	

<p>What is PMD</p>
<p>PEM Management Dashboard (PMD) is a management and visibility tool that:</p> <ul style="list-style-type: none"><li>• Simplifies partner management - spend less time administering your partners in PEM</li><li>• Improves observability - track and report on partner activities across campaigns</li><li>• Extends partner metadata - store the kind of data you want, without limit</li></ul>


## PMD with PEM STD

- PMD was originally part of the ComResource SFG framework (OPTx)
- PMD was spun off to be its own add-on to Partner Engagement Manager
- Another product that came from OPTx is Partner Control Console to help manage Client Migrations



- PMD sits on top of PEM to provide campaign management and monitoring
- Uses REST API's between PEM and PMD
- Synchronize PEM Activities with PMD
- Send status updates from PEM Activities to PMD
- Automates Partner Setup and Registration
- Provides additional Reporting and Activity Monitoring



## Dashboard

- Parameter driven charts providing high-level overview
- External queries you can customize for your specific engagement

### Default Dashboards

PEM Partners per Activity Status (Chart Param = Activity X, Y or ALL)  
 # partners not started  
 # partners in progress  
 # partners completed

PEM Partners per Campaign Status (Chart Param = Onboarding Campaign, Migration Campaign)  
 # partners in Data Collection  
 # partners in Testing  
 # partners in Promoting  
 # partners in Completed

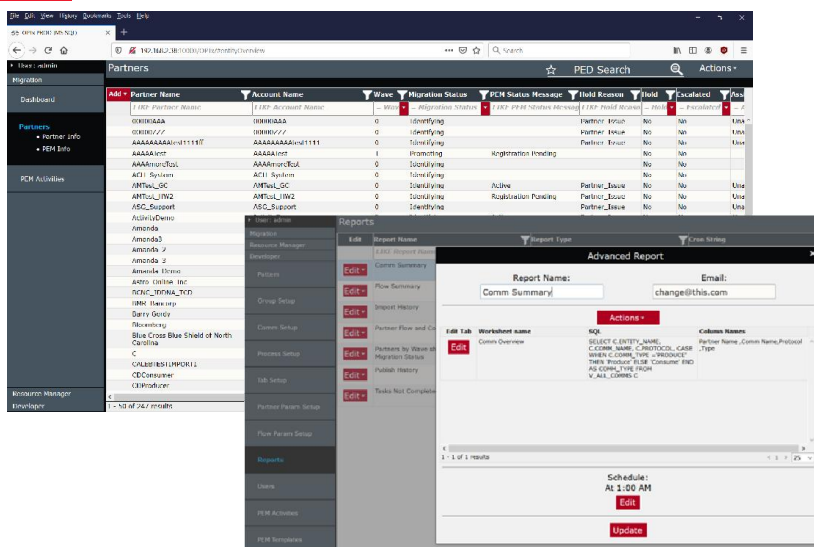
PEM Partners per Registration Status  
 # partners per registration status (Not Published, Registration Pending, Approved, Rejected, Inactive)

PEM Partners per Campaign Sponsor Admin (Chart Param = Onboarding Campaign, Migration Campaign)  
 # partners per sponsor admin



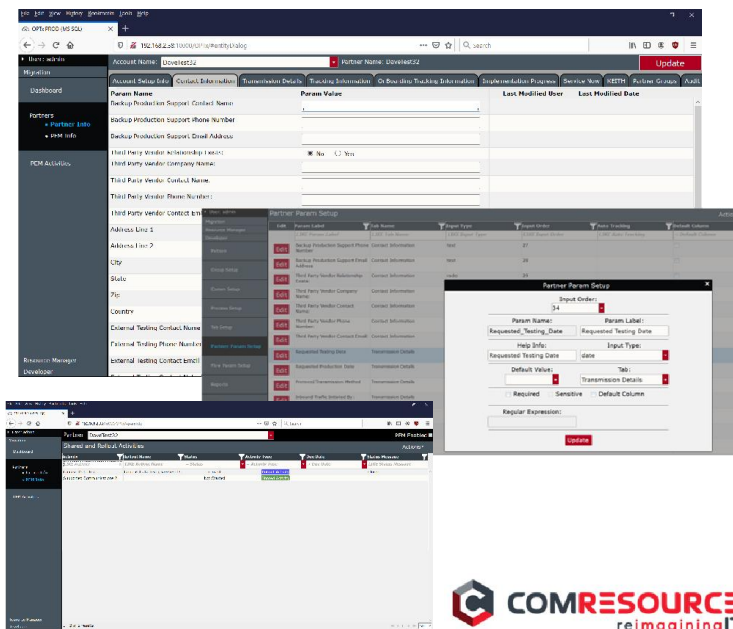
## Partners

- Customizable grid of Partners which can be filtered, sorted, and arranged
- Create different views as default or for different users
- Report from grid view to be run immediately or schedule and email
- Bulk load Partners into grid by using XML import or RESTAPI



## Partner Info

- Keep as much meta-data as desired and use for managing and reporting
- Create custom tabs and fields for tracking and reporting
- Manage PEM Campaigns and track activities
- Restrict publishing until all required data entered
- For each Partner, view their PEM Activities and the status (i.e. Not Started, In Progress, Completed)
- Rollout or Share new Activities to a Partner (does not get sent until Partner is published)



## PEM Activity Monitor

- View Activity Status for All Partners
- Filter and sort grid view
- Report on filtered grid
- Portal and Provisioner Activity status in one view

Partner Name	User Name	Activity/Template Name	Rollout Name	Status	Activity Type	Due Date	Status Message
ActivityDemo	ActivityDemo	Activity Status Test	Activity Status Test	Started	Rollout Activity		Started
RandyPEM	RandyPEM	Context Data Test	Context Data Test	Not Started	Rollout Activity		Not Started
ADVMTest	ADVMTest	Context Data Test	Context Data Test 2.0	Not Started	Rollout Activity		Not Started
Dev10SC12	Dev10SC12	Context Data Test	Context Data Test	Not Started	Rollout Activity		Not Started
Dev10SC12	Dev10SC12	Context Data Test	Context Data Test	Completed	Rollout Activity		Closed
RandyPEM	RandyPEM	Context Data Test	Context Data Test	Not Started	Rollout Activity		Not Started
RCTest5	RCTest5	Context Data Test	Context Data Test	Not Started	Rollout Activity		Closed
ACTest7	ACTest7	Context Data Test	Context Data Test	Closed	Rollout Activity		Closed
AAAAAAAAAAAA11111	AAAAAAAAAAAA11111	Context Data Test	Context Data Test	Not Published	Rollout Activity	8/23/2018	
AAAAAAAAAAAA11111	AAAAAAAAAAAA11111	Context Data Test	Context Data Test	Not Published	Rollout Activity	9/7/2018	
AAAAA1000	AAAAA1000	Context Data Test	Context Data Test	Not Started	Rollout Activity		Not Started
AAAAAAAAAAAA11111	AAAAAAAAAAAA11111	Context Data Test	Context Data Test	Not Published	Rollout Activity	10/5/2018	
AAAAA1000	AAAAA1000	Context Data Test	Context Data Test	Not Published	Rollout Activity	9/27/2018	
OTest_Sect_1	OTest_Sect_1	Context Data Test	Context Data Test	Not Published	Rollout Activity		
AM1000_PV2	AM1000_PV2	Credential Communication 2	Credential Communication 2	Not Started	Rollout Activity		Not Started
AM1000_CC	AM1000_CC	Credential Communication 2	Credential Communication 2	Not Started	Rollout Activity		Not Started
Amenda3	Amenda3	Credential Communication 3	Credential Communication 3	Completed	Rollout Activity		Completed



## Tasks

- View Tasks you created from Audit tab on individual Partners
- Calendar Due Dates can be viewed to help manage time
- Tasks can be marked as completed and can be emailed or downloaded to a calendar

Title	Account Name	Partner Name	Due Date	Completed	Assigned User
TEST	COMRESOURCE_INC	COMRESOURCE	10/18/2018	<input type="checkbox"/>	admin
Test	AAAAA1000	AAAAA1000	2/21/2019	<input type="checkbox"/>	admin
test	00000777	00000777	3/29/2019	<input type="checkbox"/>	admin
test	AAAAA1000	AAAAA1000	7/18/2019	<input type="checkbox"/>	admin
test	COMRESOURCE_Demo	COMRESOURCE_Demo	9/29/2019	<input type="checkbox"/>	admin
test	TEST_PAK1 (NR_ILS1_12)	TEST_PAK1	1/15/2020	<input type="checkbox"/>	admin
test	COMRESOURCE_Demo	COMRESOURCE_Demo	7/7/2020	<input type="checkbox"/>	admin
test	COMRESOURCE_Demo	COMRESOURCE_Demo	6/18/2020	<input type="checkbox"/>	admin
test	COMRESOURCE_Demo	COMRESOURCE_Demo	5/4/2020	<input type="checkbox"/>	admin
test	Amenda3	Amenda3	9/8/2020	<input type="checkbox"/>	admin



## PEM Publish

- Publish new Partner to trigger automated PEM creation and registration
- Publish Partner to trigger automated rollout of Activities
- View Publish history for auditing
- Export and Import for deploying from QA to Prod or for Bulk Loading Partners

The screenshot shows the 'PEM Publish' interface with two main tables:

Partner Name	Account Name	Last Modified User	Last Modified Date
AAAAAAAc1111F	AAAAAAAc1111F	admin	09/03/2020 14:06:23
AAAAAAAc1111F	AAAAAAAc1111F	admin	02/24/2020 11:11:32
AAAAAAAc1111F	AAAAAAAc1111F	admin	09/03/2020 14:06:28
AAAAAAAc1111F	AAAAAAAc1111F	admin	03/23/2020 14:06:33
AAAAAAAc1111F	AAAAAAAc1111F	admin	09/03/2020 11:18:28
AAAAAAAc1111F	AAAAAAAc1111F	admin	09/03/2020 11:26:26

Partner Name	Publish Reason(s)	Last Modified User	Published Date
AAAAAAAc1111F	using	admin	08/17/2018 10:11:20
AAAAAAAc1111F	test 2	admin	08/08/2018 11:46:40
AAAAAAAc1111F	John Test	admin	08/08/2018 11:38:16
AAAAAAAc1111F	test 2	admin	07/31/2018 11:48:52
AAAAAAAc1111F	test 2	admin	07/31/2018 11:07:23
AAAAAAAc1111F	test	admin	07/31/2018 11:46:01



## Developer Capabilities

- Synchronize Activities from cloud or local PEM instance
- Enable or Disable Activities to be used by PMD
- Developer access to create Groups and Users to limit access
- Create Tabs and Fields for tracking meta-data
- Report on saved grid views or create custom queries

The screenshot shows the 'Activities' interface with a table of activities:

Activity Name	Activity Type	Help Info	Unabled
Test Activity Name	Test Activity	Test activity details	<input type="checkbox"/>
Context Data Test	Context Data Test	Context data test	<input type="checkbox"/>
Credential Communication 2	Credential Communication 2	Credential Sharing	<input type="checkbox"/>
Credential Communication 3	Credential Communication 3	Credential Communication 3	<input type="checkbox"/>
HW1 Approver 2	HW1 Approver 2	HW1 Approver 2	<input type="checkbox"/>
HW2	HW2	Hello World	<input type="checkbox"/>
HW2 clone	HW2 clone	Hello World 2 clone	<input type="checkbox"/>
HW J4071MPC03C	HW J4071MPC03C	Hello World 2	<input type="checkbox"/>
Hello World Demo	Hello World Demo	Hello World Demo	<input type="checkbox"/>
OSU SHF 2017 2018	OSU SHF 2017 2018	Hello World	<input type="checkbox"/>
Reverse Activity 1	Reverse Activity 1	Reverse Activity 1	<input type="checkbox"/>
Reverse Activity 2	Reverse Activity 2	Reverse Activity 2	<input type="checkbox"/>
Reverse Activity 3	Reverse Activity 3	Reverse Activity 3	<input type="checkbox"/>
Reverse Activity 4	Reverse Activity 4	Reverse Activity 4	<input type="checkbox"/>
Reverse Activity 5	Reverse Activity 5	Reverse Activity 5	<input type="checkbox"/>
Reverse Activity 6	Reverse Activity 6	Reverse Activity 6	<input type="checkbox"/>
Reverse Activity 7	Reverse Activity 7	Reverse Activity 7	<input type="checkbox"/>
Reverse Activity 8	Reverse Activity 8	Reverse Activity 8	<input type="checkbox"/>
Reverse Activity 9	Reverse Activity 9	Reverse Activity 9	<input type="checkbox"/>
Reverse Activity 10	Reverse Activity 10	Reverse Activity 10	<input type="checkbox"/>
Reverse Activity 11	Reverse Activity 11	Reverse Activity 11	<input type="checkbox"/>
Reverse Activity 12	Reverse Activity 12	Reverse Activity 12	<input type="checkbox"/>
Reverse Activity 13	Reverse Activity 13	Reverse Activity 13	<input type="checkbox"/>
Reverse Activity 14	Reverse Activity 14	Reverse Activity 14	<input type="checkbox"/>
Reverse Activity 15	Reverse Activity 15	Reverse Activity 15	<input type="checkbox"/>
Reverse Activity 16	Reverse Activity 16	Reverse Activity 16	<input type="checkbox"/>
Reverse Activity 17	Reverse Activity 17	Reverse Activity 17	<input type="checkbox"/>
Reverse Activity 18	Reverse Activity 18	Reverse Activity 18	<input type="checkbox"/>
Reverse Activity 19	Reverse Activity 19	Reverse Activity 19	<input type="checkbox"/>
Reverse Activity 20	Reverse Activity 20	Reverse Activity 20	<input type="checkbox"/>



## PMD Benefit Summary

- Simplifies PEM partner onboarding and management
- Provides additional visibility and granularity into partner activity status
- Allows for customization of user experience
- Built in bulk load for existing not just new partners
- Provides customizable, on-demand, scheduled reporting and status of campaigns
- Tracking of resource tasks with notifications and to-do list



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