

Support Client Experience A successful transition to IBM





Your Presenters:

- Robyn Hall Business Analytics Client Care Support representative
- Jay Fischer Business Analytics Client Care Support representative
- Dave Stewart Business Analytics Knowledge Management Lead

Also on the call we have:

- Steven Savaglio Global Manager for the BA Client Care Team
- Nick Anderson Americas Team Lead for the BA Client Care Team
- Vincent Ngan Business Analytics Software Engineer
- Rob Priffer Your Integration Lead



Agenda for today's session:

- ICN and Site Numbers defined
- Importance of Contacts / Roles defined
- IBM Web ID
- Software Download & Media Access
- The Support Portal (Customizing your experience, searching the Knowledge Base and Signing up for Product Notifications)
- Online Service Request Tool (gaining access, logging your request, search for previously logged PMRs and managing User access



What's an ICN and Site Number, and why are they important?

All IBM agreements include an IBM Customer Number (ICN) and Site Number. These numbers correspond to your agreement and are used to access many services included in your agreement.

- ICN will be used to access Support
- Site Number is used to access online content, including:
 - Software downloads
 - Transaction and Proof of Entitlement documentation
- ICN is an identifier of your organization
- Site Number is an identifier of a site within an organization
- A single ICN can have a single or many Site Numbers



Importance of the Primary Contacts

&

Roles defined

* How to request changes to this list



Understanding the importance of your Primary Contact list 6 Primary roles explained

Each Site Number contains your agreements' six contacts

Two contacts manage user access to online services

Administration / proof of entitlement Contact

- Requesting / authorizing account changes
- Software Maintenance Renewal notices (unless Software Maintenance Renewal Contact is designated),
- Software upgrade availability notifications
- Proofs of Entitlement

Payer / Billing Contact

Invoices

Primary Contact

- Individual entering into contractual relationship with IBM
- Responsible for IBM Software and Services On-line Tool (Passport Advantage)
- Responsible for managing user access to this tool on behalf of your company.



Understanding the importance of your Primary Contact list 6 Primary roles explained...continued...

Site Technical / STC (aka Primary Site Technical Contact / PSTC)

- Responsible for overall support compliance
- Obtains support and manages user access to the online Service Request (SR) tool

Software S&S media shipping

Receives any physically shipped media

Software S&S renewal

Responsible for securing with Software Maintenance Renewals.



Understanding the importance of your Primary Contact list 6 Primary roles explained...continued...

- Want to confirm who we have listed or make changes to these Primary roles?
- Call or Send an email to your local eCustomer Care Team.
- Navigate to: https://www.ibm.com/software/howtobuy/softwareandservices and select the "Need Assistance" link for a Global Listing of phone numbers and email addresses.



IBM Web ID * How to Register



Your IBM WebID: Why I need one

An IBM WebID is the driving credential to log into our online support services on ibm.com. Some sites request you just login while others request a one time "self nomination" against your ICN or Site Number.

In order to utilize these online services you must Register a WebID. A register link is found on most pages that require a login, however you can just go to www.ibm.com and select Register at the top right of our homepage.





Software Download & Media Access via the

Passport Advantage web site

https://www-112.ibm.com/software/howtobuy/softwareandservices

- * Self Nomination
- * Downloading Software
- * Managing Access
- * Patches on FixCentral



Software Download & Media Access Self Nomination

First time Login to the Passport Advantage web site with your WebID



www.ibm.com/software/passportadvantage



Software Download & Media Access Self Nomination

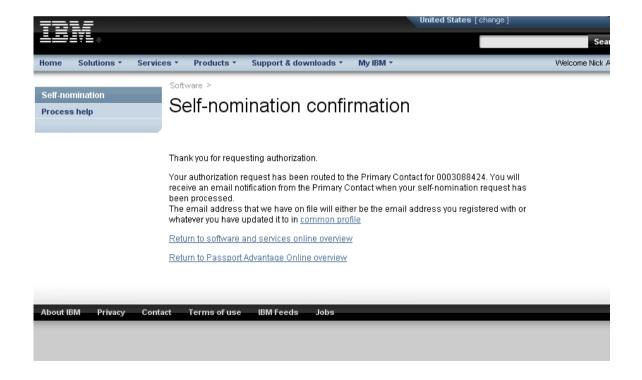
- Add your Site Number and choose the appropriate Yes / No Radio Button and select Submit
- If prompted for a Temporary Passcode (your Primary contact would have received it in your Welcome Letter)
- In order for our automated email feature to be initiated (which notifies the Passport Advantage Primary Contact that someone is requesting access) the PA Primary <u>MUST</u> first be associated (and approved) to their respective contractual numbers. If they are not then ALL user requests CANNOT be approved.

The fields indicated with an asterisk (*) are required to complete this transaction; other fields are optional. To request authorization, please complete and submit the self-nomination request below so that we may route your request for processing. Customer information Site number* I believe I am the Primary Contact for this Site. * Select Yes if you are the contact for all IBM business communications regarding this site number. As the primary contact you are responsible for managing access for all users to this online tool. There can only be one primary contact for each site number. Select No if you need access to this online tool but are not the primary contact. There can be unlimited users for each site number. Yes No Cancel



Software Download & Media Access Self Nomination

A Confirmation Page will appear stating your request will be sent to the PA Primary for verification and approval. If you selected YES that you are the Primary then your request will be sent to the eCustomer Care Team for validation. You will receive an email from them once it has been processed. Or you may <u>call</u> to expedite



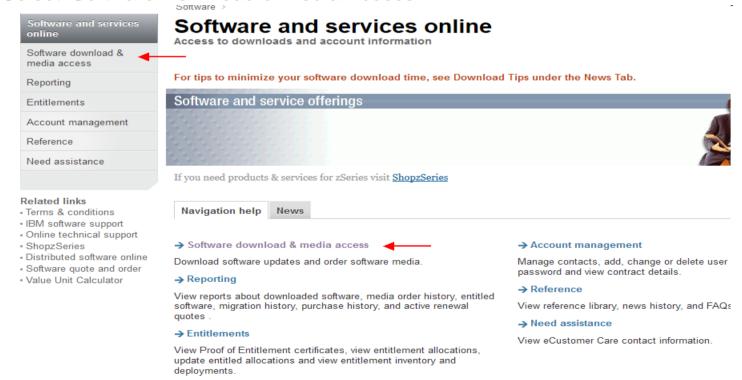
https://www-112.ibm.com/software/howtobuy/softwareandservices



Accessing Current Releases

Once your Self Nomination has been approved you will now be able to access your Entitled Software.

- Log into the Passport Advantage Site and you will land on the 'Software and Services Online' home page.
- Select 'Software Download & Media Access'





Accessing Current Releases

Select 'I Agree' to Terms

By clicking on the "I agree" button below, you agree that:

"You obtain Eligible Products (including, but not limited to, software licenses, software subscription updates, or new releases) subject to the terms of the agreement under which you acquired the software product(s), including, but not limited to, any applicable amendments to the agreement and related transaction documents.

"Any other use of the software program(s) is prohibited.

If you select "I do not agree" below, you will be unable to complete the transaction you have requested.

O I agree Continue

Cancel



Accessing Current Releases

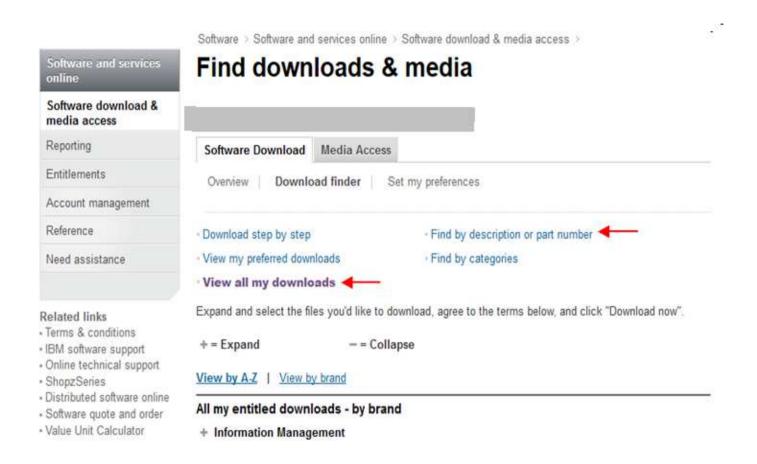
Select 'Download Finder'





Accessing Current Releases

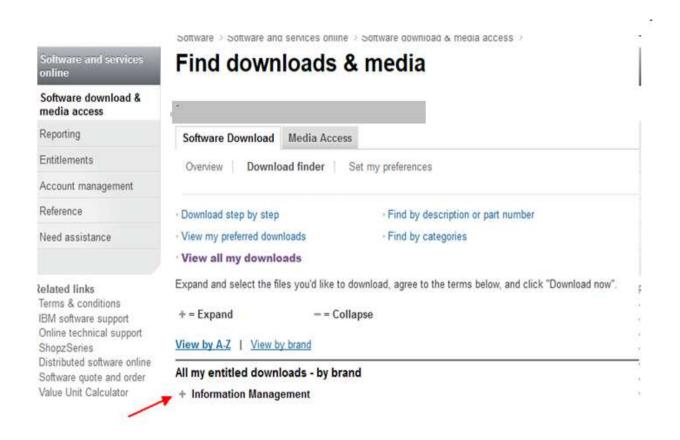
Select 'View all my downloads' or use the 'Find By' options to display Entitled Software





Accessing Current Releases

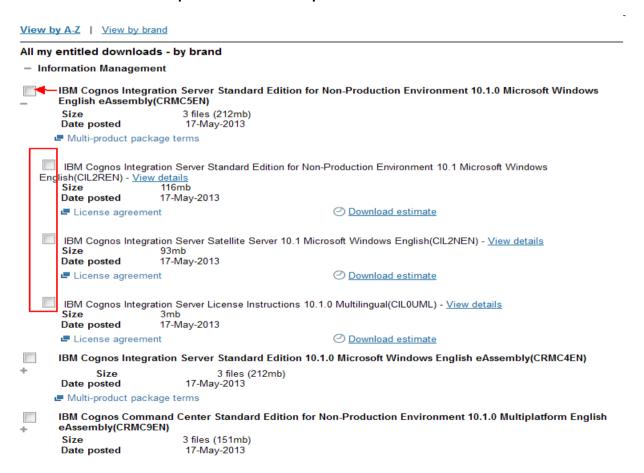
Expand the 'Information Management' Brand to display your Entitled Software





Accessing Current Releases

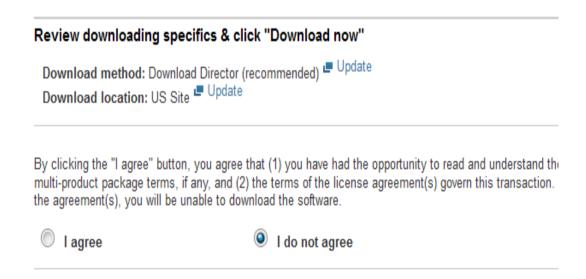
Scroll down to locate your desired product, check the box to the left of the product or expand the suite to download a particular component.





Accessing Current Releases

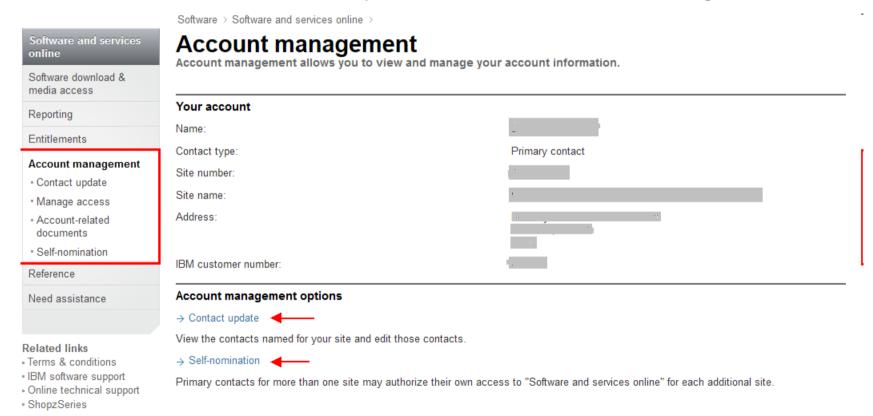
Scroll to the bottom of the page and agree to additional terms >> Select Download Now!





Contact Management

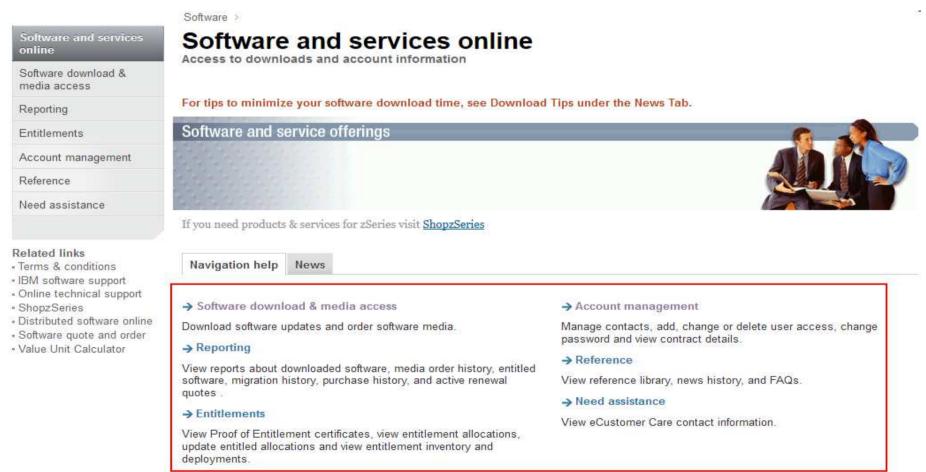
- The Primary Contact has the administration capabilities to add / remove and alter access levels to the Passport Advantage site. These functions are only available after the Primary has self nominated to a site number and has been approved by the eCustomer Care Team.
- Once access has been established you can now use the Account Management functions.





Additional Passport Advantage Functions

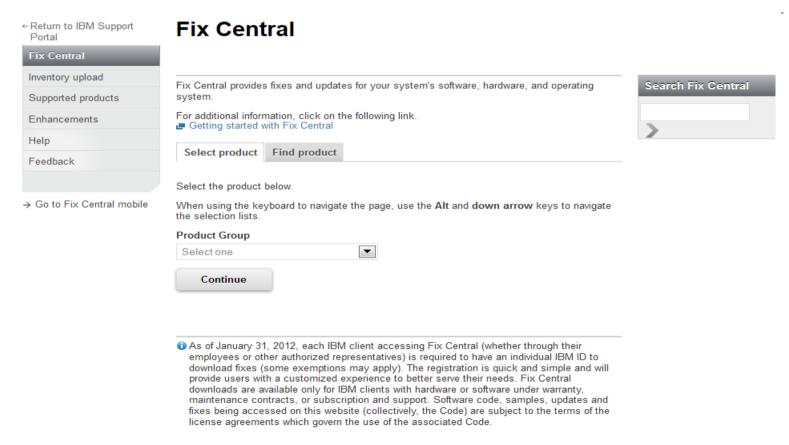
You will notice after logging into the Passport Advantage site that there are a number of other functions available such as; Retrieving Proof of Entitlement certificates and Reporting tools that are available.





Accessing Current Releases vs. Fix Packs

Current Releases will always be posted on the Passport Advantage site while all Fix Packs and Patches (for your current installation) will be hosted on our Fix Central website



http://www-933.ibm.com/support/fixcentral/



Support Portal

Customizing the site, searching the Knowledge Base and signing up for 'Notifications'



Support Portal: Customizing your online Experience (Demo and direct link) www.ibm.com/software/analytics/support/

Business Analytics Support

Finding Answers

Downloads

Support Programs

Contacting Support

Getting support for your Business Analytics products

We created the IBM Support Portal to make your life easier.

Whether you use Business Analytics products from the IBM Cognos, IBM SPSS, IBM Clarity or IBM OpenPages families, you can configure the IBM Support Portal to provide just the information you need.

Within this microsite, we provide some guidance on

- · finding answers
- · downloading software, fixes and product documentation
- · choosing your support programs
- · contacting support.

We also offer a number of videos to help you get the most out of the IBM Support Portal. Watch more IBM support videos.



View an instructional video on how Business Analytics customers can benefit from the IBM Support Portal.





How to do everything on IBM.com

 Watch this video to learn how to do common support tasks on IBM.com



IBM Support on YouTube

→ Watch helpful IBM Support videos and tutorials on YouTube



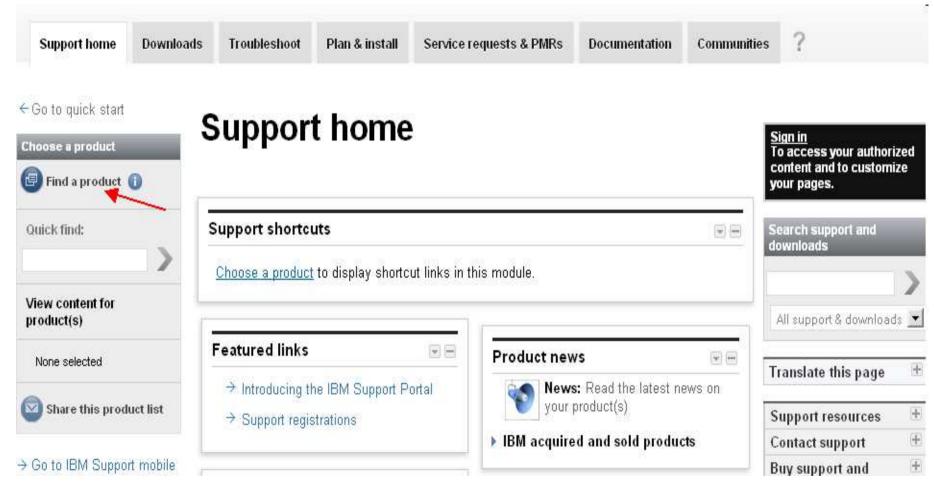
Support Portal

→ Visit the IBM.com Technical Support Portal



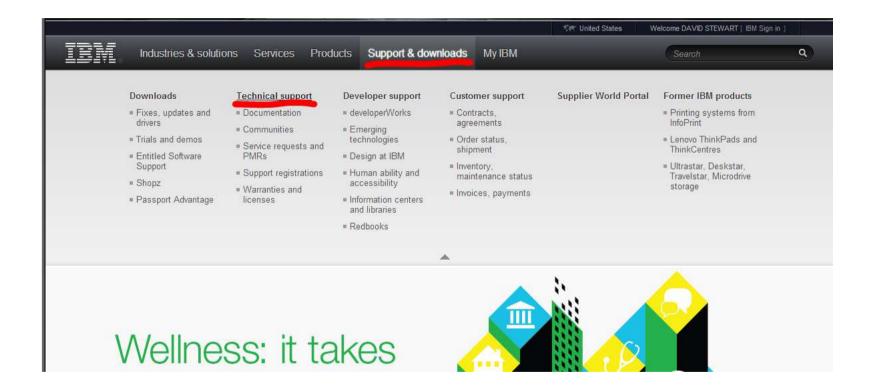
Support Portal home

www.ibm.com/support support.ibm.com



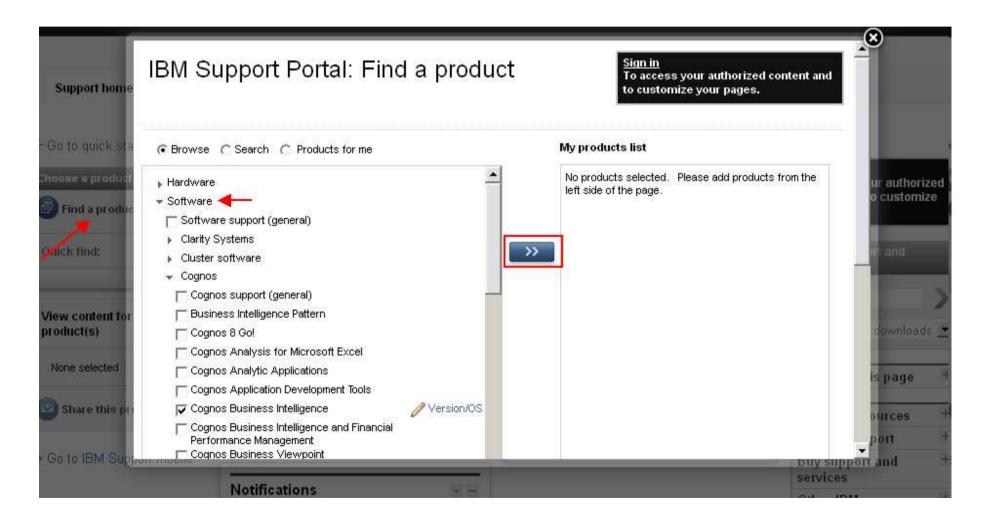


Or just navigate there from the ibm.com homepage



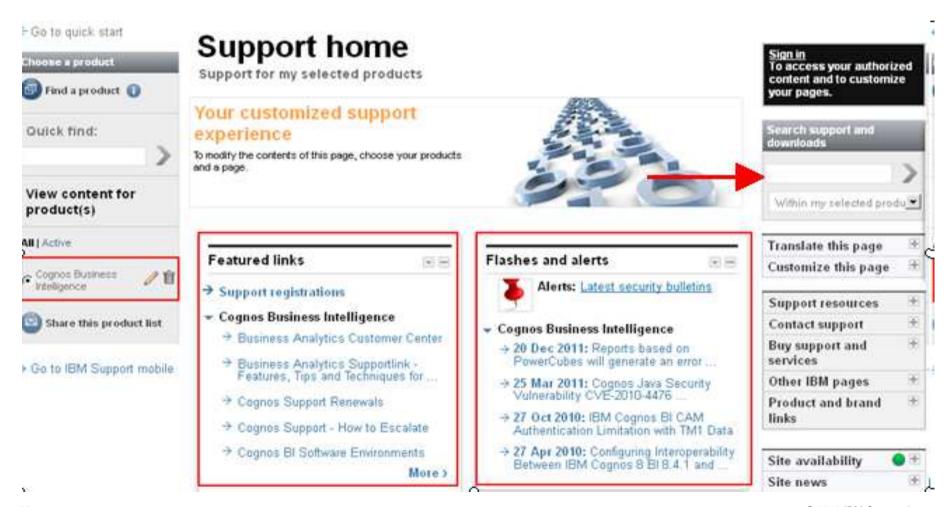


Support Portal: add products you are interested in to maximize its functionality



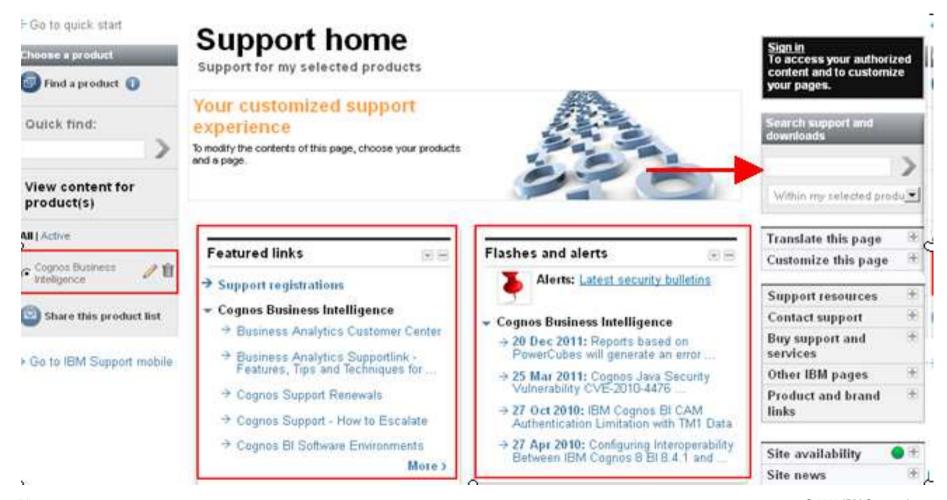


Now that products are loaded, you can now use the Knowledge Base more effectively and all featured content reflects the products selected.



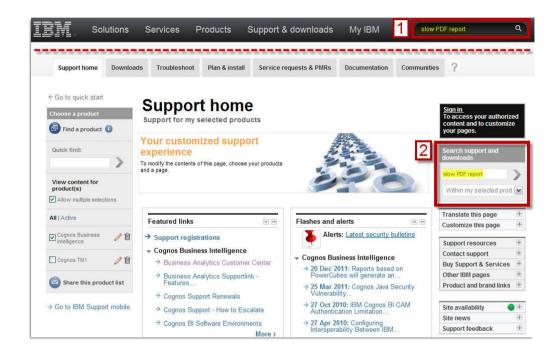


Content that is pushed into each of the portlets is based on the product(s) configured and enabled at any one time in Support Portal. A search executed within SP has only those same product(s) in scope, so users will never see irrelevant results.





The scope of the search being limited to only the product(s) of interest is one of the biggest advantages of searching within Support Portal as opposed to the ibm.com masthead search, or Google etc.



As a result, the scope of any search is all of IBM and its 4,000 products and millions of related pages.

Support Portal searches are

appears on most ibm.com pages.

The masthead search (#1)

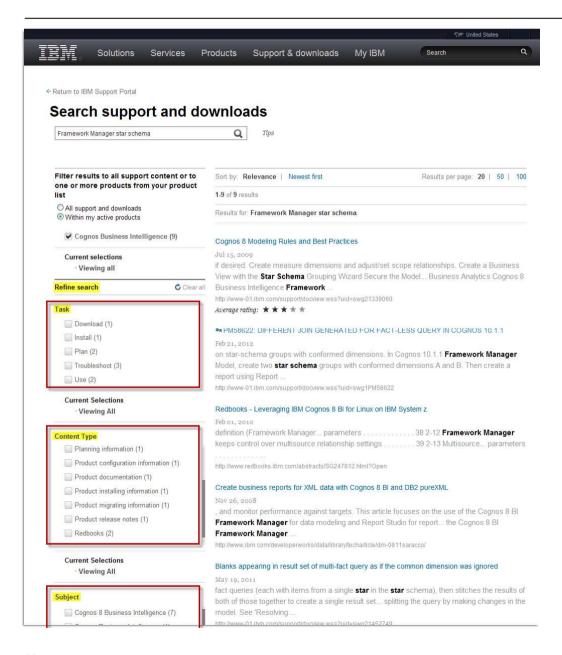
Support Portal searches are limited in scope to the product(s) that are configured and enabled (or checked).

An external search with Google etc. has no scope boundaries and will return MANY results.

ibm Cognos slow PDF report X Search

About 72,300 results (0.22 seconds) Advanced search





When using the IBM Support Portal to search for product knowledge, you have the ability to either refine your search query, or filter the results based on:

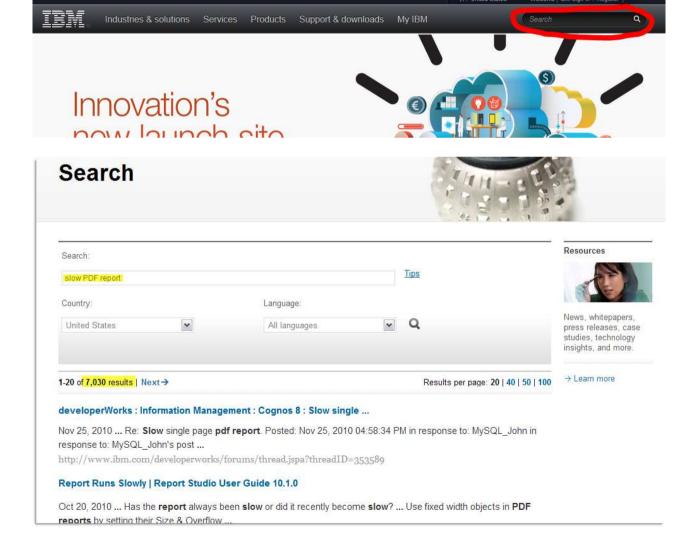
- Product
- functional Task
- Content Type
- related products (Subject)

For the first time ever, you are able to focus a search on multiple products (assuming they have been added to your Support Portal product list).

This could be very helpful when troubleshooting, for example, an issue that spans Series 7 and Cognos Business Intelligence, or an issue involving both Cognos BI and DB2 or Websphere even.

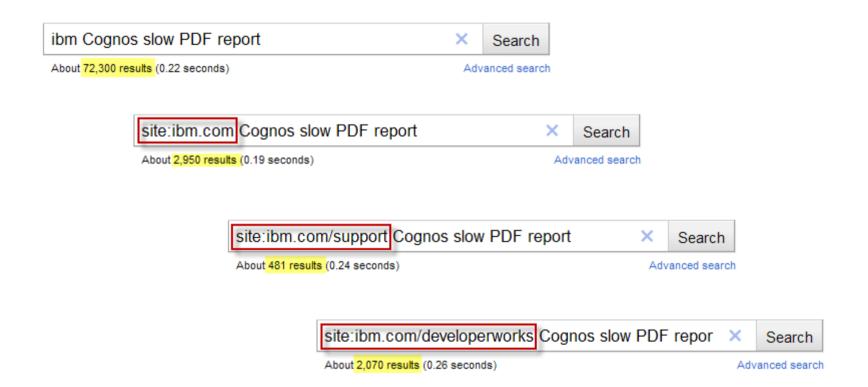


The masthead search has all of IBM as its scope which means that searching with generic keywords is far less effective than searching on error codes or exact strings/messages.





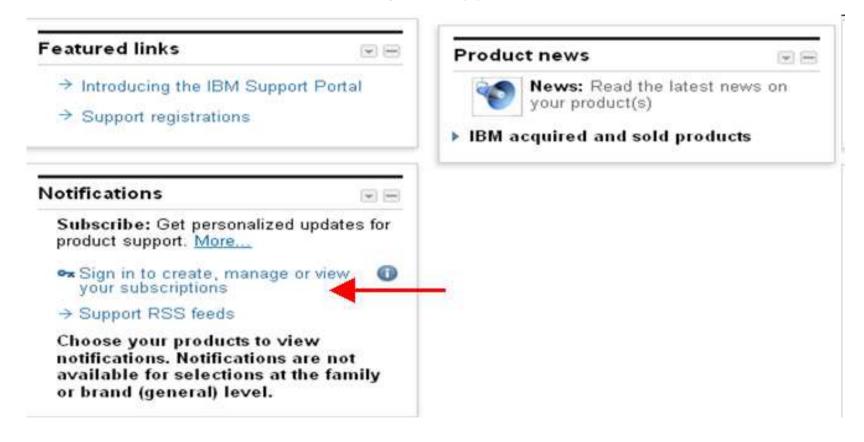
For those who insist on using Google, a **site filter** is highly recommended in limiting the otherwise unlimited scope in effect





Notifications: Staying current with product updates and information by Registering for Notifications!!

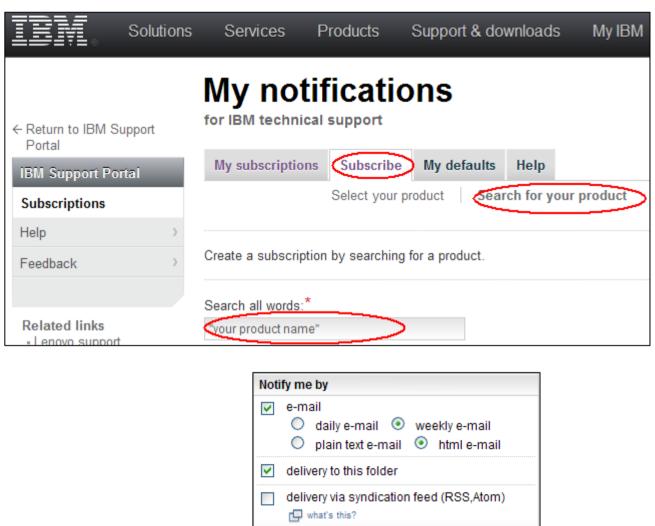
* From the main body of Support Portal





Notifications:

Customize products, content and frequency of communication from IBM



Doc	ument types *
Sel	ect/deselect all
V	Flashes
~	News
~	Downloads and drivers
▽	Fixes Recommended High-Impact / Pervasive (HIPER) Security Vulnerability (Sec/Int)
V	Troubleshooting Technotes(Troubleshooting) Technotes(FAQs) APARs (Authorized Program Analysis Reports) Fix readmes Preventative Service Planning PTF (Program Temporary Fix) cover letter
~	Product information and publications
~	Webcasts



IBM Subscription Services - eNewsletters

- Given the amount of unsolicited email you may be receiving, we don't want to add to that deluge and risk important information being missed, or worse being blocked by your spam filters
- IBM does not send out individually addressed notifications about new releases or older releases reaching end of service.
- The previous slide describes how you can stay informed about support related information we encourage all customers to also register for IBM Subscription Services to receive eNewsletters related to their specific interests (for example: notifications about new releases or older releases reaching end of service)
- Register your WebID here https://www-148.ibm.com/bin/subscriptions/welcome.cgi
- Sign Up here https://www-148.ibm.com/bin/subscriptions/welcome.cgi



Online Support Services

The online Service Request Tool

*Creating Support Requests online and by phone.

Requesting access and site functionality

https://www.ibm.com/support/servicerequest/Home.action?Ink=msdTS-srap-usen



For Your Information

Your previously logged incidents with Star Analytics Support will not be available for your access. IBM will keep a repository of closed incidents but we are not able to make those available online. Only "open" incidents as of June 17, 2013 will be seen via the online Service Request Tool.



How do I create a Support Request?

You have two avenues for Support at IBM

- 1. Create a request via the Online Service Request Tool

 Take ownership of the PMR process and provide the problem information we need to solve
 your issue faster!!
- Call your Local Support Centre and a Call Receive Agent will log the case on your behalf.
 Your Local Support Centre can be determined by navigating to www.ibm.com/planetwide
 For North America that number is 1-800-426-7378



Requesting Access to SR Tool

SR Assistance Page

https://www.ibm.com/support/servicerequest/help/srHelp.action

* SIMPLIFIED *

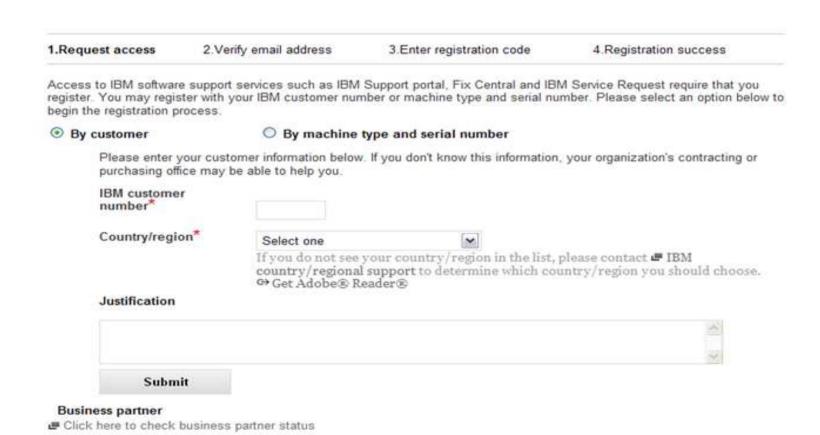
- Registering with SR
- Access SR at http://www.ibm.com/support/servicerequest/
- Enter your IBM login ID and password. If you do not have a login ID, click the "Register Now" link located just above the login box to create your login/password.
- Step 1 Request access Enter your IBM customer number, select the country/region, and click Submit
- Step 2 Verify email address Click the Send verification email button. This will send you an email with a registration code.
- Step 3 Enter the registration code that was sent to you into the Registration code field and click Submit.
- Step 4 Registration success Click Return back to my agreements to see the status of your access request



Requesting Access to SR Tool

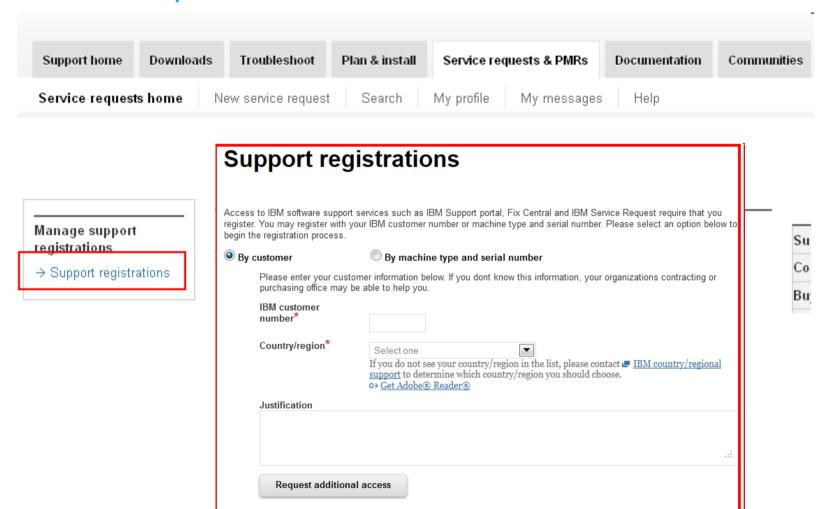
* Not Registered Sign In

https://www.ibm.com/xsrAuth/authenticate?ok_url=https%3A%2F%2Fwww-946.ibm.com%2Fsupport%2Fservicerequest%2FHome.action





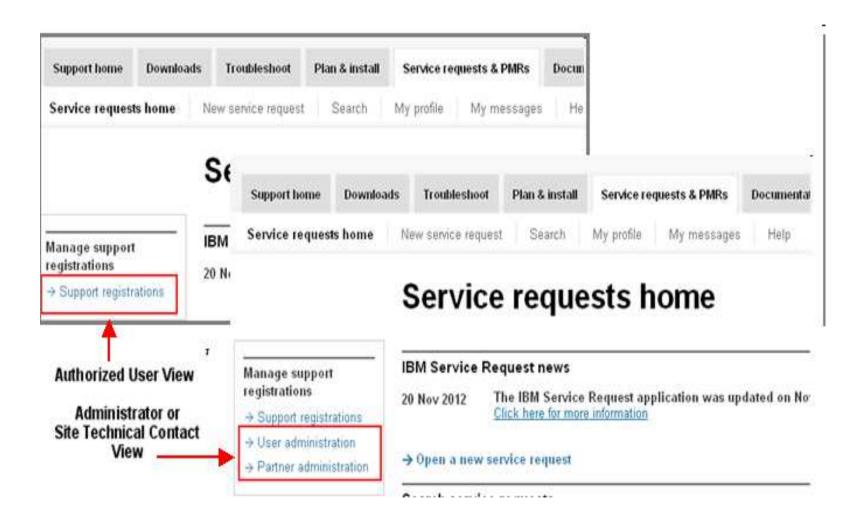
Service Request: Self Nomination to an additional ICN





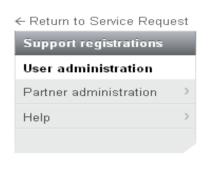
Service Request:

Authorized User vs Site Technical Contact view





Service Request: User Administration

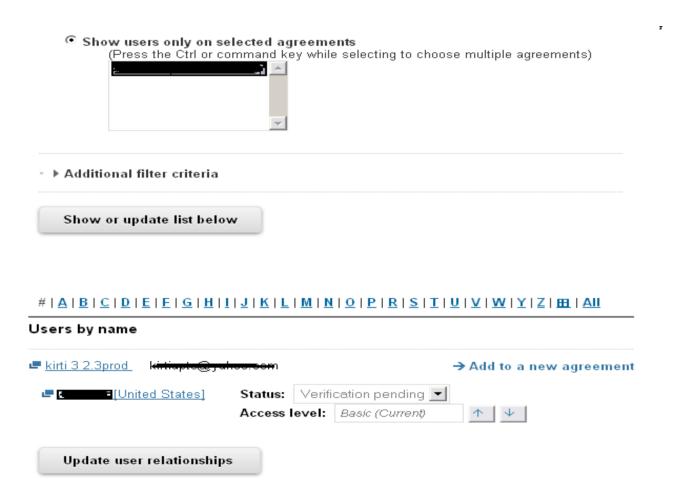


User administration





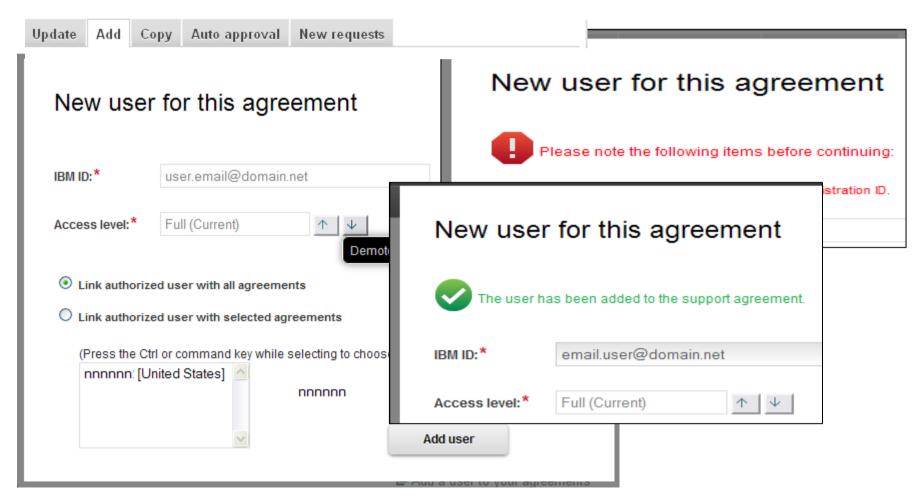
User Administration: Update existing user





User Administration: Add a new user

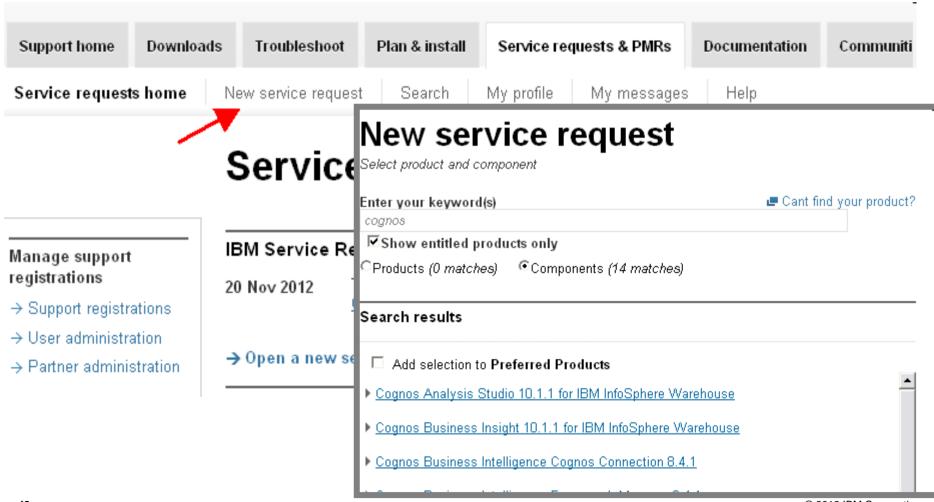
Add an authorized user relationship.





Service Request Submission

https://www.ibm.com/support/servicerequest/help/srHelp.action





Service Request: Problem Description

New service request

Complete problem description

Support Assistant collector files.)

Problem description

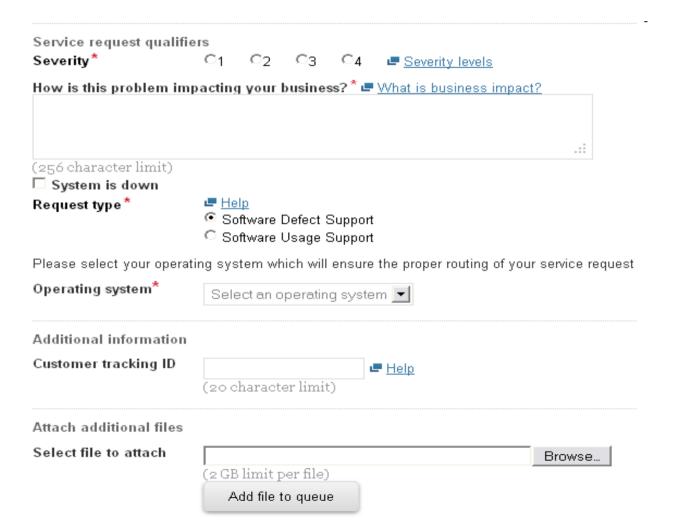
Please complete the problem description information below. The fields indicated by an asterisk (*) are required to complete this transaction; other fields are optional. If you do not want to provide us with the required information, please use the "Back" button on your browser to return to the previous page, or close the window or browser session that is displaying this page.

Before providing problem information and/or diagnostic attachments, please read and understand Exchanging diagnostic data with IBM.

roblem information		
tle *		
	(256 character limit)	
roblem description*		

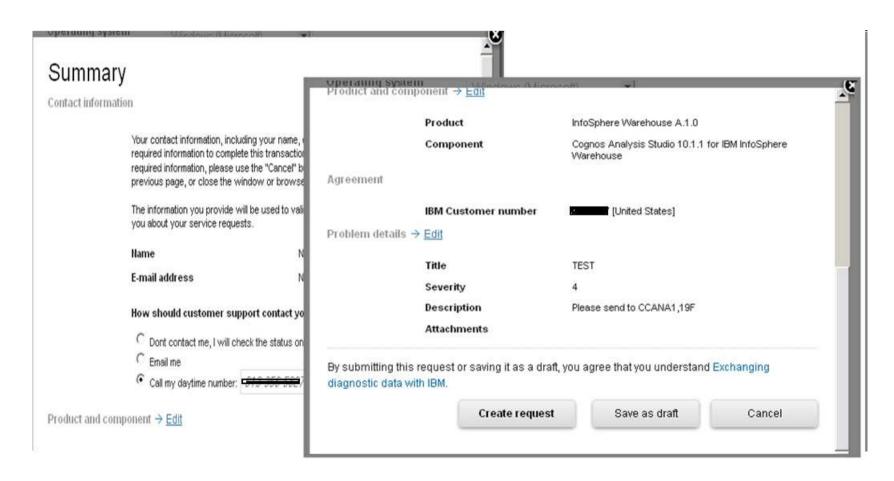


Service Request: Severity, Business Impact, Files



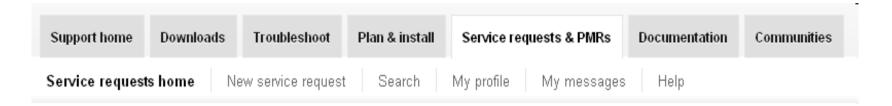


Service Request: Summary, Submission Verification, ID Assigned





Service Request: Confirmation Page



New service request

Service request submitted

Success!



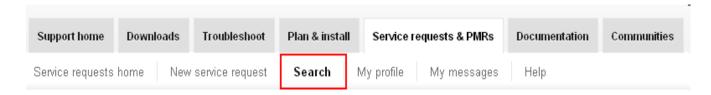
Your service request number is 38808 514 000.

Customer support will call you at phone number: 613-356-5827-.

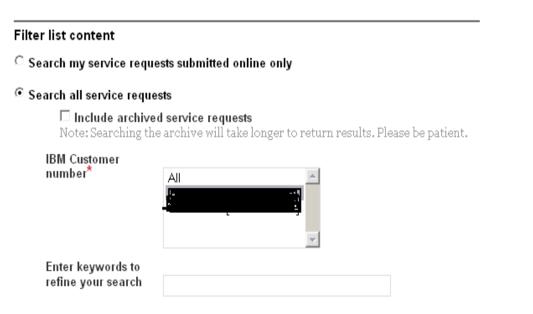
← Return to the IBM Service Request home page



Service Request: Search and view



Search





Service Request: Search and view

•	number Select country
• Show service red	quests up to todays date
C Show service red	quests by date range 🗷 <u>Help</u>
© Created within rate O Updated within rate Closed within rate Note: this option is coption below.	ange
From	To M/d/yyyy format
	ests by criteria below be used as additional filter criteria; blank fields will not be used.
✓ Show open servi	ice requests
E Show open servi	1
Show closed servi	
_	



Questions?

■ If you would like a copy of today's Client Experience Webinar please email the BA Client Care Team including the Subject Line: "Star Analytics Client Experience Webinar" and would be happy to send you a copy.

clientcare@ca.ibm.com

Should you have any questions or are not receiving a response through other avenues, just know you can contact us at any time and someone will contact you during local business hours.



Quick Link resources:

Star Analytics Customer Center

www.ibm.com/software/analytics/staranalytics/customercenter/support.html

Passport Advantage (eCustomer Care) Global listing

https://www.ibm.com/software/howtobuy/passportadvantage/paocustomer/docs/en_US/ecare.html

■ IBM Electronic Support help page

www.ibm.com/support/electronicsupport/overview.html

IBM Business Analytics Twitter

https://twitter.com/basupp

IBM Business Analytics Support Blog

https://www.ibm.com/connections/blogs/basupportlink/?lang=en_us

Online Service Request Tool helpdesk

ftp://public.dhe.ibm.com/software/websphere/techexchange/SRToolOverview.pdf

 Support Technical Exchanges (series of Open Mic conference calls and webcasts where technical experts share their knowledge and answer your questions on specific technical topics)

http://www-947.ibm.com/support/entry/portal/scheduled_tech_exchanges