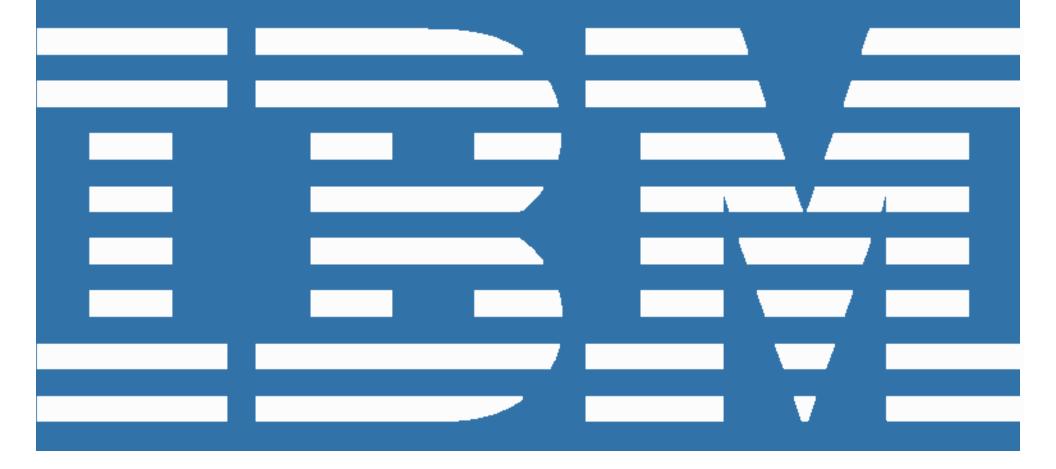# Doing Business With IBM

A guide for StoredIQ customers in North America

Welcome to IBM!

On February 7, 2013, IBM announced completion of the acquisition of StoredIQ. This acquisition advances IBM's efforts to help clients derive value from big data, respond more efficiently to litigation and regulations, and dispose of information in an automated way that has outlived its purpose.

Beginning January 1, 2014, StoredIQ will be conducting business as IBM.

The following "Doing Business with IBM" guide describes changes to expect and actions needed to maximize the benefits of your relationship with IBM. It will also help to ensure a smooth transition to IBM's business systems and processes. Most of your contacts in sales, service delivery and support will remain the same.

As a customer of IBM, you will continue to have access to StoredIQ offerings, now under the IBM brand, as well as the extensive IBM portfolio of software solutions and services offerings, while enjoying the high-quality, responsive service you have come to expect from both StoredIQ and IBM.

We anticipate that you and your organization will experience a smooth transition to IBM over the next several months. During this process, the IBM team and your IBM StoredIQ representatives are available to answer any questions and to address your ongoing software and service needs.

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Please watch for a letter from IBM containing important information and key actions including:

- Your IBM Customer Number
- Your Software Site Number
- Software and services tool and registration
- Software subscription and support

1. Important actions for StoredIQ customers

Create an IBM profile

Your company's Primary Contact will need to create an IBM profile

With an IBM profile, you can view, update or add personal contact details, job title or registration settings.

Create or update your IBM profile here: https://www.ibm.com/account/profile/us

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Create an IBM Registration

Your company's Primary Contact will need to create an IBM Registration

Your IBM Registration ID, also known as an IBM ID, is your single point of access to IBM web applications that use IBM Registration.

You need just one IBM ID and one password to access any IBM Registration based application.

Create or update your IBM Registration here**:** https://www.ibm.com/account/profile/us?page=reg

Please note there may be a delay of up to 15 minutes before you will be able to use your new IBM ID.

Need assistance?

For additional information and guidance on setting up your IBM profile and IBM Registration ID, consult our FAQ page here: https://www.ibm.com/account/profile/us?page=faqhelp

Alternatively, you may contact the Worldwide IBM Registration Helpdesk at the following link: https://www.ibm.com/account/profile/us?page=helpdesk

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2. Accounts Payable and Purchasing

Effective January 1, 2014, StoredIQ accounts payable and purchasing processes will migrate to IBM processes.

Important changes in Accounts Payable and Purchasing

Tax ID Exemption Certificates and Change Requirements	Vendor applicable Tax Identification Number will change. If you are currently exempt from Sales and Use tax, or local VAT, you will need to issue your company's Tax Exemption Certificates to IBM with your first order after January 1, 2014. IBM's tax forms can be found here: http://www-03.ibm.com/procurement/proweb.nsf/contentdocsbytitle/United+States~Tax+forms.
Vendor name	Vendor name will change from StoredIQ to the applicable local/regional IBM operation covering your location (the term "Vendor" below represents the applicable IBM entity).
Vendor remit-to addresses	Vendor remit-to addresses for checks, wire transfers and overnight payments will change for all new business after January 1, 2014. The new details will appear on your invoices issued from IBM after that date.
Vendor standard payment terms	In most countries, Vendor standard payment terms of "due upon receipt" may be applicable. You can find this information on either your invoice or quote.
Currency	In some countries, the currencies used by StoredIQ are different than those used by IBM, thus you may be transacting in a different currency with IBM.
Languages	In some countries, the correspondence you will receive from IBM may be in the local language.

Customer numbers	Effective January 1, 2014, StoredIQ customers will be assigned an IBM Customer Number (ICN). In a few weeks, you will receive your ICN in a welcome letter from IBM. Please note that your ICN will be used with all order-related communications.
Purchase documentation	All purchase documentation, such as invoices, will be sent to the contact(s) listed in the IBM profile associated with your ICN unless specified otherwise in your order
Part numbers and product descriptions	New part numbers and product descriptions for the IBM StoredIQ portfolio will replace the pre-existing StoredIQ product descriptions. These new part numbers and descriptions will appear on quotes and invoices you may receive from IBM.
Document formats	The format of documents (quotes, services statements of work, invoices, etc.) you receive will change in format after January 1, 2014, and they will be issued from an IBM location as appropriate. This may affect the remit-to address, and in certain countries, the transaction currency that you are using today.
PO requirements	If your company requires issuing a purchase order (PO) to facilitate payment for goods or services, IBM may require a new PO. Contact your StoredIQ representative with any questions.
New licensing process	IBM StoredIQ offerings are governed by license agreements which can be found here: http://www-03.ibm.com/software/sla/sladb.nsf/search/. *Note: your legacy contract continues to apply to your existing software until such time as you move to the IBM license agreement*
Migration to new pricing metrics	Coming into IBM, your product entitlements will be moved to IBM systems. At that time, your sales representative will be available to explain your entitlement grant as well as answer any questions about the charge metrics of the offerings.

3. Software Support

StoredIQ Support offerings will continue to be used after January 1, 2014 and supported by the IBM StoredIQ Support team. The IBM StoredIQ Support team will continue to focus on delivering customer satisfaction without compromise.

As we work to integrate StoredIQ and IBM Support, we will offer IBM StoredIQ customers expanded capabilities through the existing IBM Support infrastructure. For the most current information on the IBM StoredIQ Technical Support transition, visit the StoredIQ Technical Support page at http://www-01.ibm.com/software/ecm/storediq/support/ for the latest updates. This site is also an excellent source of information for those new to IBM Support.

IBM does not anticipate changes until late in the 1st half of 2014.

What does not change on January 1, 2014

Support is provided per your existing StoredIQ Support agreements. Continue to contact support toll free at (886) 227-2068 or by sending an email to storediqsupport@us.ibm.com.to open new cases with IBM StoredIQ Support.

As part of the transition into IBM Support, StoredIQ will be contacting you to validate the correct Primary and Site Technical Contacts

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Below are informational highlights to help you understand the definition of those future roles in IBM Customer Support.

Primary Contact	The **Primary Contact** is a specific individual who will manage access to the IBM Download Site for their organization's IBM StoredIQ software contract(s). The Primary Contact approves IBM Download Site access requests from their organization and will receive all download account management and communications. This person will also be the primary contact for annual support renewal invoices for IBM StoredIQ software and services at your organization. Note: If a Primary Contact is not designated, the Site Technical Contact will be used for both roles. Only a **single** Primary Contact can be designated per company in the IBM systems.
Site Technical Contact	The **Site Technical Contact** is a specific individual from the customer's company who will manage access to IBM's Technical Support services and grant the authority to open Technical Support Requests on behalf of their organization. The Site Technical Contact approves IBM Support access requests from their organization's employees and business partners and will receive all IBM Support access instructions and communications. More information regarding IBM Electronic Support can be found at http://www-01.ibm.com/support/electronicsupport/workwithibm.html. Only a **single** Site Technical Contact can be designated per company in the IBM systems. Additional Named Callers can be added to the system by the Site Technical Contact.

IBM Accelerated Value Program

IBM will also make available to IBM StoredIQ clients an enhanced level of support through the IBM Accelerated Value Program (AVP). This program provides pro-active and preventative support through the assignment of specific support staff to assist you with all aspects of operating your IBM StoredIQ software. More information on this program can be found at http://www-01.ibm.com/software/support/acceleratedvalue/index.html.

For information about IBM Support, please refer to the online IBM Support Portal documentation at http://www-01.ibm.com/support/electronicsupport/portal.page.

4. Software Subscription and Support Renewals

StoredIQ Support Renewals will be integrated into the IBM Software Subscription and Support Renewals process in a phased approach. Your Software Subscription and Support Renewal is determined by the date your current StoredIQ Support contract expires.

Renewal dates and actions

Renewal date before January 1, 2014	You should have received a quote from your StoredIQ Renewal representative and you should have proceeded with confirming your renewal by your current renewal date or December 13, 2013, whichever is earlier, to ensure that there are no disruptions in service. Any renewals not confirmed by that date will be re-quoted under IBM's terms and conditions. If you have not yet received a quote, please contact your StoredIQ Renewal representative.
Renewal date between January 1, 2014 and March 31, 2014	If your renewal falls within these dates, you should have received a quote from your StoredIQ Renewal representative with an opportunity to renew early. If you elected not to take advantage of this opportunity by December 13, 2013, the original renewal quote will still be valid until March 31, 2014. However, any orders received after that date will need to be addressed to IBM and will be subject to IBM's terms and conditions. Invoicing, part numbers and payment terms will change to IBM standard conditions and the renewal end date will move out to the last day of the month. If you have not yet received a quote, please contact your StoredIQ Renewal representative
Renewal date after April 1, 2014	Your Software Subscription and Support Renewal quote will be generated from IBM systems and provided to you by your IBM Subscription and Support Renewal representative. This quote will be subject to standard IBM terms and conditions, and the renewal end date will move out to the last day of the month. In the future, Software Subscription and Support Renewals will transition to IBM's Passport Advantage program. At that time, you will receive a notice to renew your StoredIQ Software Subscription and Support Renewal for your IBM StoredIQ products through IBM's Passport Advantage program. Notices will be generated from IBM systems and provided to you by your IBM Software Subscription and Support Renewal representative.

5. Passport Advantage

IBM offers two license acquisition and Software Subscription and Support offerings — Passport Advantage (http://www-01.ibm.com/software/lotus/passportadvantage/aboutpassport.html) and Passport Advantage Express (http://www-01.ibm.com/software/lotus/passportadvantage/aboutexpress.html). Passport Advantage is designed for larger enterprises, while Passport Advantage Express is designed to meet the needs of medium-sized businesses.

Passport Advantage	Passport Advantage is IBM's comprehensive program for software license acquisition, Software Subscription and Support, IBM Appliances and IBM SaaS subscriptions. It is designed for larger enterprises that may have multiple sites. Passport Advantage gives you more opportunities to obtain better pricing for your volume purchases over time and is based on your Relationship Suggested Volume Price (RSVP) level.
Passport Advantage Express	Passport Advantage Express is designed for single-site, smaller enterprise businesses. It combines the full Passport Advantage product list with the simplicity of transaction-based acquisition. Passport Advantage Express does not require a relationship agreement— each transaction is subject to the terms and conditions effective at the time. There are no points and no aggregating— just a single price level. And with each new license acquisition, you get renewable Software Subscription and Support.

After January 1, 2014, IBM StoredIQ products and support will be available under both Passport Advantage and Passport Advantage Express.

6. Professional Services

IBM will now provide StoredIQ Professional Services.

IBM StoredIQ Professional Services will serve as your services partner with the same professional staff we have always deployed.

Changes in Professional Services as of January 1, 2014	IBM will assume any ongoing StoredIQ Professional Services engagements and statements of work (SOW) and will perform as originally contracted. While there will be some process changes regarding the way contracts and SOWs are developed, there are virtually no changes to the overall StoredIQ services business model.
	Customers will engage IBM StoredIQ services to support the IBM StoredIQ portfolio of products. One exception is customers requiring a purchase order between their organization and IBM to facilitate payment for existing StoredIQ services. In that case, the customer must provide their StoredIQ services contact with a new purchase order to IBM, which references the original contract or SOW.

All new services orders will be contracted using standard IBM services agreements, rate structure and SOWs. The IBM services agreements, SOWs, and service order systems may be a separate system from the IBM software licensing contracts and order systems (e.g., Passport Advantage).

7. Privacy Policy

As part of the acquisition, personal information may be transferred from StoredIQ to IBM. IBM's privacy policy may be viewed online at http://www.ibm.com/privacy.