Integrated Customer Management System (ICMS) Service and Support Guide

Version 1.0

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IBM

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Document History

Version 1.0 updated on March 17. 2000 is the initial publication of ICMS Service and Support Guide.
This document is available on the ICMS Product Service and Support web site at
http://www2.clearlake.ibm.com/icms/ .   To ensure you have the latest changes, you should check the
level of the guide as it exists on the ICMS web site.

Objectives of this Guide

The Integrated Customer Management System (ICMS) Product Service and Support organization created this guide with the following objectives:

- Provide an overview of the service and support available to you.
- Help you to effectively utilize ICMS Service and Support processes to get the service you need.

We believe that having your business is both a privilege and a responsibility. We hope to maintain that business by providing you with solutions to your information technology problems. We are committed to:

- Satisfying your service requirements
- Providing a clear, consistent and comprehensive structure to meet your software support needs
- Continuously improving our service and support processes

ICMS Product Service and Support

ICMS Product Support - An Overview

We want to ensure that we can deliver the technical assistance required to meet your expectations regarding ICMS product support. Our goal is to satisfy you each time you need to call on us for support. Through support structure, we can provide:

- Timely responses to your ICMS related inquiries
- Answers to your ICMS usage questions
- Resolutions to your ICMS software or documentation problems

The following sections describe the ICMS Support options that are available to Customers in 2000. Current ICMS Customers may have support agreements with slightly different terms and conditions. We honor all contracts currently in effect and will provide support for the ICMS product as documented in your maintenance agreement.

Base Support

Support for ICMS is provided remotely by a regional ICMS Service Center. On-site support is not part of IBM's base support, although it is available on a fee basis. Base support includes problem support for ICMS software and documentation via facsimile (fax), mail, telephone (voice), and electronic access.

ICMS base support is contracted on an annual basis under the terms and conditions specified in the IBM customer contract/agreement, Attachment for Support, and Addendum for Support. Support is available until the end of service life date for a specific ICMS version or release or until such time it is withdrawn by IBM as specified in your Addendum for Support.

A support line is provided to give you the ability to contact IBM and ask ICMS installation and usage related questions as well as make defect inquiries. The support line is available Monday through Friday, from 8 a.m. to 5 p.m. in your time zone, with the exception of IBM holidays. You can contact ICMS through the toll-free telephone number specified in your Addendum for Support agreement.

8x5 Support

Base support includes:
- Two designated callers (your technical representatives) per location
- Reasonable amount of technical assistance:
  - ➢ Usage (how-to) and installation questions
  - ➢ Product compatibility and inter operability questions
  - ➢ Interpretation of product documentation
  - ➢ Diagnostic information review to help isolate the cause of a problem
  - ➢ ICMS database searches for known problems and fixes
  - ➢ Planning information for ICMS software fixes

- ICMS defect support
- On-line program corrections if necessary
- Access to ICMS technical bulletins, hints, tips, and frequently asked questions
- Access to escalation management

Optional Support

Expanded support options are available at an additional annual support charge.

24 x 7 Support

24x7 Support extends support availability for telephone technical assistance to 24 hours a day, 7 days a week, excluding IBM holidays. You may designate up to four additional persons (two per shift) to act as technical representatives. The scope of services is the same as for base 8x5 support.

Software Subscription

Subscription service is sometimes called "upgrade protection". This offering provides ICMS program updates as they become available and you request them. A program update is a new ICMS version or release that is announced during your annual support period. Although in recent years there has been a new ICMS version or release annually, there is no guarantee that program updates will be announced during your support period.

Custom Modifications Support

Support for custom modifications to ICMS is available through the ICMS Service and Support organization. This support is contracted separately from the base product support (8x5 or 24x7) via a special bid. The custom modification support covers:
- Defect support for custom code at the last resynchronization level
- Resynchronization of custom code to base product PTF packages twice per year, scheduled to accommodate your business needs
- Technical assistance at the level provided for the ICMS base product under your annual support contract terms

IBM Responsibilities

Support for the ICMS product line is provided directly through IBM. We warrant that Support will be provided using reasonable care and skill and according to the description contained in your Addendum for Support. We will strive to provide prompt, courteous service. We will always receive your approval before accessing your system. If your problem or issue is not within the scope of ICMS Service and Support responsibility, we will try to refer you to someone within IBM who can help.

Customer Responsibilities

It is your responsibility to purchase Support services for ICMS. When you contract for ICMS Support, you agree to provide sufficient, free, dial-in access to your system for the fulfillment of our obligations. You also agree to appoint a specified number of technical representatives who are knowledgeable about ICMS function and operation and can perform as the your internal problem managers and as interfaces to the ICMS Service and Support teams.

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You are responsible for maintaining software library structures and change control procedures as agreed with your ICMS Service team. You must verify fixes and resynchronized code deliveries in a test environment prior to use in your production environment. For code corrections delivered to resolve a problem reported by you, you are expected to notify your ICMS Service Center upon acceptance of the fix. You are responsible to keep the maintenance level of your ICMS production system current.

Additionally, if you purchase Support for custom modifications, you agree to provide to IBM:
- Current copies of the source code and documentation for the modifications.
- Descriptions of the customer system environment in which the modified code is executed.
- Sample test data bases to assist in the analysis of suspected problems and the testing of custom code corrections.

ICMS Product Service and Support

ICMS Support Services Delivery

The ICMS Service and Support organization is a global team headed by a worldwide ICMS Service and Support Manager. Teams perform Level 2 Service and/or Level 3 Support for the ICMS product line. Our organization is driven by and measured by ICMS customer satisfaction.
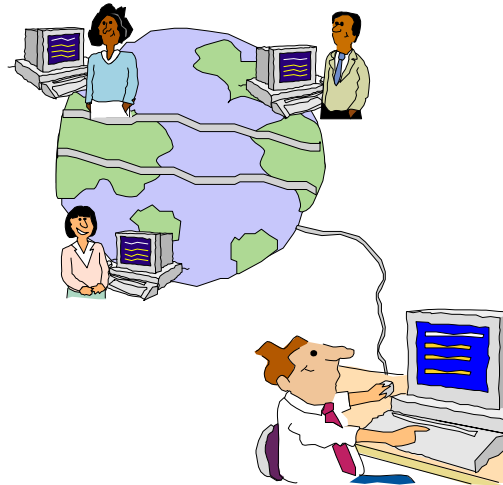
Level 1 Call Centers

The call center is the initial point of contact for ICMS service. A call center service representative checks customer entitlement to support, collects contact and product information, records the problem description, and routes your call to the appropriate service specialist.

Level 1 service is provided differently depending on your location. In some countries, such as Japan and the Philippines, local IBM teams provide Level 1 support for ICMS customers. In many countries, such as Iceland and the United States, customers call a Level 2 Service Center directly. Some customers have an on-site Level 1 team. Your initial point of contact for ICMS Service is specified in your Support Addendum or maintenance agreement.

Level 2 Service Centers

Response and resolution centers are located in each geography to manage queries from our Customers on ICMS installation, usage, operation, documentation, databases, and defects. The Level 2 teams handle the communications with our ICMS Customers' technical representatives.

Level 2 teams are located in:
- Americas: Vancouver, Canada
- Europe, Middle East, and Africa: La Gaude, France
- Asia Pacific: New Zealand

Level 3 Support Centers

Technical support teams own the correction of software defects and are co-located with the ICMS product development labs. The Level 3 teams investigate suspected software errors, make code changes, verify the fixes, package and ship software updates to the Level 2 centers for distribution to Customers.

Level 3 teams are located in New Zealand and Vancouver, Canada.

ICMS Product Service and Support

Support Tools

RETAIN
All Customer problems are documented and tracked using the Remote Technical Assistance
Information Network or RETAIN, a worldwide IBM problem management tool proven through years
of use by customers around the world. RETAIN provides automatic work flow management,
consistent measurements and reports, and drives standard global support processes.

Customers with ICMS Support contracts, may obtain access to RETAIN data through the IBMLink
ServiceLink offerings. ServiceLink applications provide the capability to view and update your PMR
and APAR data via the Internet or the IBM Global Network, Dial access. You must be a registered
IBMLink user. Some ServiceLink applications are fee offerings.
Country-specific information on IBMLink is available from your local IBM Marketing office or at
http://www.ibmlink.ibm.com/.

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Contacting IBM for ICMS Support

In order to understand and resolve your service request in an expedient way, it is important that you have the following information ready when calling:

- Your customer number, your Support ID (SID), your PIN number
- The phone number where you can be reached
- A feeling for the business impact or severity of the problem you are reporting. User the following table as a guide:

Problem Severity Definition

Severity	Description
1-Critical	The customer cannot use a function/program which has a critical impact on the business operation with no practical workaround.
2 - Major	The customer can use the function/program but the business operation is severely restricted
3 - Moderate	The customer can use the function/program. However, there are some restrictions of the functions that can be used. These restrictions do not have a critical impact on business operations.
4 - Minor	Problems that do not cause a malfunction. Minor details, incorrect or poor presentation, spelling or grammatical errors.

Reporting a Software Problem

If you are reporting a problem with ICMS software, prior to contacting IBM you should:

➢ Define the problem as specifically as you can.

Our ICMS service and support analysts want to be sure that they provide you with the correct answer or solution. The better they understand your specific problem scenario, the better they are able to provide the right solution.

➢ Being able to answer the following questions will help us in our efforts in resolving your software problem:

- What level of ICMS software were you running when the problem occurred?
- Has the problem happened before, or is this an isolated incident?
- What steps led to the failure?
- What ICMS menu path was used and what is the ICMS database name?
- Have any changes been made to the system (hardware or software)?
- Were any messages or other diagnostic information produced? If yes, what were they? (It is often helpful to have a printout or the message number(s) of any messages received when you place the call to ICMS Support.)

➢ Gather relevant diagnostic information if possible.

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It is often necessary that our software support specialists analyze specific diagnostic information (i.e., storage dumps, traces, messages, etc.) in order to resolve your problem. Gathering this information is often the most critical step in resolving the problem. If you are unsure about what documentation is required, you can always contact ICMS Service & Support for assistance in gathering the needed diagnostic information.

Asking a Technical Question

If you are contacting IBM with a technical question about ICMS, prior to calling, you should:
- Determine the release level of ICMS that your questions relates to.
- Define your question in specific terms.

Other Important Information

When speaking with an ICMS service representative, you should also mention the following items if they apply to your situation:
- You are under business deadline pressure.
- Your availability (i.e., when you will be able to work with ICMS Service & Support).
- You can be reached at more than one phone number.
- You can designate a knowledgeable alternate contact with whom we can speak.
- You have other open problems (PMRs) regarding this service request.
- You have researched this situation prior to calling IBM.

Responsiveness Goals

When you call ICMS Service and Support, you may be connected to a service analyst during your initial call to IBM. However, when you call cannot be routed live to a service specialist, our goal is to call you back within 2 business hours during prime shift. Prime shift is defined by the prevailing business hours in your time zone, Monday through Friday, except IBM holidays. Off shift is defined as all other hours. For customers with 24x7 service agreements, our goal is to respond within 4 hours if the request is received before 8 AM or after 5 PM local time. These response goals apply to all problems, all severity levels.

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How Your Call is Handled

When you call IBM for ICMS support, your call is taken by a service representative in an ICMS service center. The representative will ask you some basic questions and create a unique problem management record (PMR) in our on-line RETAIN database. Please note the PMR number and use it in any future calls to the service center in reference to this same problem. Once the representative has enough information to direct your request, he/she will route your call live to a response team or queue your call for callback by a service analyst. In either case, the next person you speak with will be an ICMS specialist.

At the team level your call is researched, resolved or escalated as appropriate. While working with you on the problem, IBM may need to access information on your system relative to the failure or may need to recreate the problem to get additional information. Should the problem be configuration related, it is possible you may need to recreate the problem to get that required information.

While working with you on the problem, our technical analysts may request that you send problem information or test cases or that they be able to view it with you electronically. To accomplish this, you may be offered several options, depending on the impact and complexity of the problem.
- Review the problem data on-line by setting up a remote session.
- Mail the requested problem information to the address provided.
- Send the problem information via the Internet or e-mail.

Actions, analysis, and activities related to the resolution of your problem are recorded in the PMR. The status, history, and duration of the PMR is tracked. The RETAIN system provides traceability and accountability for the handling of your service request. We will notify as soon as we have an answer to your question or a resolution to your problem.
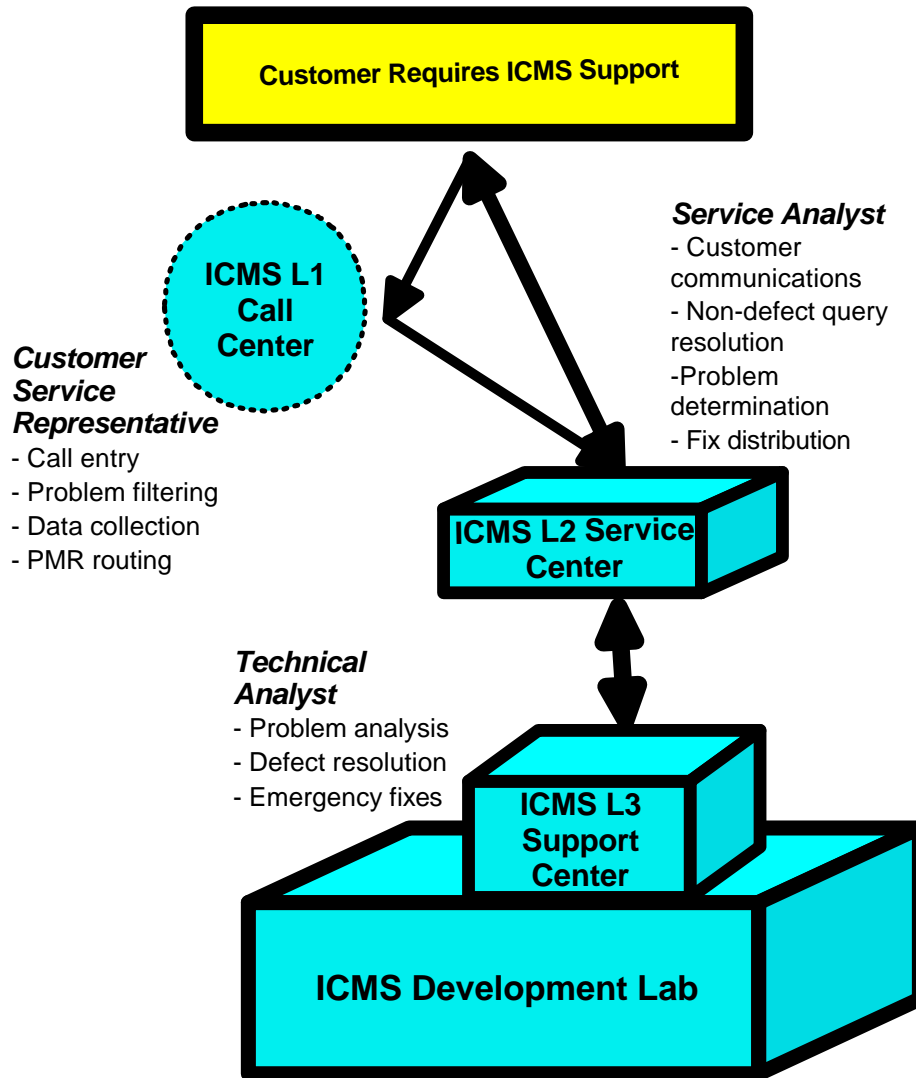
If it is determined that your request for service is a result of an ICMS software defect that has not been reported before, we will create an Authorized Program Analysis Report (APAR) to track the resolution of the defect. For low impacting problems where you don't need an immediate, permanent fix, we may defer the fix to a future release. For impacting problems, the appropriate Level 3 team is engaged and will work to resolve the situation. Because of the complexities of the problem, the environment, or the software, APARs may take several weeks to debug and to write, test, package, and distribute the fix. For high impact problems, the resolution team will make every effort to develop a workaround that you can use until the defect has been resolved. If necessary, IBM can provide on-line programming services to correct an urgent problem.

We will notify you when a fix to your problem is available. Once you have received a program fix, we will follow up with you to confirm resolution of the problem. When you have verified the fix, please contact the ICMS call center so that the PMR may be placed in a resolved status. If for some reason the problem is not resolved or you are dissatisfied with the solution, your PMR will remain open while

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IBM continues to work on the problem. The PMR will not be closed until the problem is resolved to
your satisfaction.

Call Flow

The illustration below shows how your call for technical support flows through our ICMS Service and
Support structure using the response center-resolution team concept.

Customer Requires ICMS Support

ICMS L1 Call Center

Service Analyst
- Customer communications
- Non-defect query resolution
-Problem determination
- Fix distribution

Customer Service Representative
- Call entry
- Problem filtering
- Data collection
- PMR routing

ICMS L2 Service Center

Technical Analyst
- Problem analysis
- Defect resolution
- Emergency fixes

ICMS L3 Support Center

ICMS Development Lab

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Fix Distribution

Fixes or PTFs (Programming Temporary Fix) are distributed to your company by the Level 2 Service Center in your region. A PTF for a high impact problem (for example, a Severity 1 or 2 problem) may be transmitted electronically to you as soon as it is ready. If necessary in an extremely urgent or emergency situation, IBM can provide on-line programming services while dialed into our customer's system.

Deliveries of groups of fixes for a given ICMS release are called PTF Paks. The delivery mechanism may be either electronic or via tape or CD. The schedule for PTF Paks varies by ICMS release level, but generally PTF Paks are shipped 3-4 times per year. Documentation shipped with the PTF Pak provides installation instructions, describes the defect corrections, identifies database updates, and lists new and changed objects. PTF Pak schedules and documentation is available by release level on the ICMS Product Service and Support web site.

If you have a Support agreement for custom modifications, you will receive two deliveries per year of the custom code resynchronized to a selected base ICMS PTF Pak level. The timing of the resync deliveries is adjustable and is arranged with your Level 2 Service center. PTFs for high impact custom code defects are provided to you at the last resynchronization level on an as-needed basis between "resync" delivery cycles.

Escalation Procedures

At any point in our service process if your expectations are not being met by the ICMS Service and Support organization, you may call our attention to the problem by speaking with the ICMS Service Manager at the Level 2 center. The Service Manager's contact data is available under Contacts on the ICMS Service and Support web page or from the Service Representative answering the Support line at the ICMS call center. The Service Manager will work with our staff to ensure your request is being handled appropriately.

If after speaking with the Level 2 Service Manager you are still dissatisfied with the ICMS service provided for your problem, please contact the Worldwide ICMS Service and Support Manager whose contact data is available under Contacts on the Support web page or from the ICMS customer service representative.

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Preventing Problems

IBM recommends the installation of ICMS maintenance releases, called PTF Paks, to proactively avoid problems caused by software "bugs" already known and corrected. PTF Packs are provided under the basic support service available through a Support agreement. PTF Paks are delivered periodically, usually about every quarter, but the frequency varies by ICMS software level.

A schedule of PTF Pak shipments for active ICMS releases is available on the ICMS Service and Support web site under the specific software release level.

ICMS Product Service and Support Web Site

Access the ICMS Service and Support web site at http://www2.clearlake.ibm.com/icms/.

The web site contains useful information related to the ICMS product line and ICMS Support such as:
- ICMS technical bulletins,
- FAQs (frequently asked questions and answers),
- Alerts (important and urgent information about situations or errors that might affect your telecom business)
- PTF Pak schedules and documentation.

The site also contains documents on Support policies and procedures and links to related sites. Please visit the site frequently to take advantage of self-help opportunities and to view the latest ICMS Support news.