

# IBM Algorithmics Support

## Client Experience Webinars





## Welcome to IBM &

Thank you for attending this Client Experience Webinar

- **Your presenter:** Axular Bilbao Presa  
Business Analytics Client Care Support
  
- **To download the Client Experience Webinar slides:**  
<http://www-01.ibm.com/software/analytics/algorithmics/customercenter/webinar.html>

## Agenda:

- ICN and Site number defined
- Importance of the 6 designated Contacts within your organization and their roles defined
- IBM ID / IBM WebID
- IBM Passport Advantage - Software Download & Media Access
- IBM Support Portal (Customizing your support experience, searching the Knowledge Base and Signing up for Product Notifications)
- How to contact IBM Algorithmics Support - Service Request Tool (gaining access, opening a Service Request, search for previously opened Service Requests and managing User access)

## What is an ICN and Site Number?

### 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 6 designated Contacts within your organization  
&  
Their roles defined  
  
(How to request changes)**

# Understanding the importance of the 6 designated Contacts

## 6 Contact roles explained...continued...

Each Site Number contains your agreements' six contacts. Each of the designated IBM Contacts within your company have a specific role.

The 2 Primary contacts manage user access to online services

### ▪ **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 Passport Advantage on behalf of your company (Software download).
- Responsible for updating the 6 designated Contacts

### ▪ **Primary Site Technical Contact (aka Site Technical Contact)**

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

### ▪ **Payer / Billing Contact**

- Invoices

<http://www-01.ibm.com/support/docview.wss?uid=swg21389775#2>

# Understanding the importance of the 6 designated Contacts

## 6 Contact roles explained...continued...

- **Administration / proof of entitlement Contact**
  - Requesting / authorizing account changes
  - Software Maintenance Renewal notices (unless Software Maintenance Renewal Contact is designated),
  - Software upgrade availability notifications
  - Proof of Entitlement
  
- **Software S&S\* media shipping**
  - Receives any physically shipped media
  
- **Software S&S\* renewal**
  - Responsible for securing with Software Maintenance Renewals

\*S&S Subscription and Support

<http://www-01.ibm.com/support/docview.wss?uid=swg21389775#2>

# Understanding the importance of the 6 designated Contacts

## 6 Contact roles explained...continued...

- The 6 designated Contacts within your company may be reviewed and updated:
  - **Online**  
by navigating to Passport Advantage and selecting Account Management -> Contact Update (see slide number 21)
  - **By phone or Email**
    - Navigate to: <https://www.ibm.com/software/howtobuy/softwareandservices>
    - Select the “Need Assistance” link for a Global Listing of phone numbers and email addresses.
    - Contact the IBM eCustomer Care Team



## **What is an IBM ID aka IBM Web ID?**

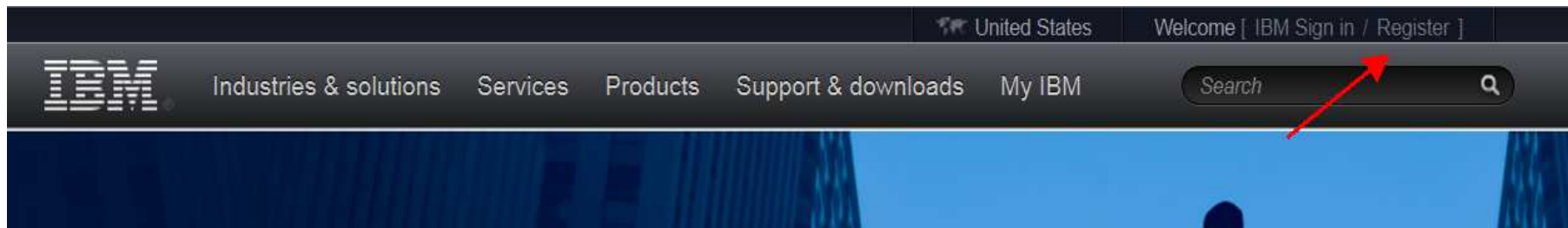
**\* How to Register on IBM.com**

## Your IBM ID / IBM WebID

### Why register on IBM.com?

An IBM ID or 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 for an IBM ID or WebID. A register link is found on most pages that require a login, however you can just go to [www.ibm.com](http://www.ibm.com) and select Register at the top right of our homepage.



## **IBM Passport Advantage Online (aka Software & Services Online)**

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

- \* Self Nomination
- \* How to Download Algorithmics software
- \* Managing Access
- \* Review and Update your 6 Contacts
- \* Patches on FixCentral

# Software Download & Media Access

## Self Nomination

- First time Login to the Passport Advantage web site with your IBM ID

Software > How to buy > Passport advantage >

## IBM Passport Advantage

Passport Advantage Online

Program overview | Passport Advantage Online

For customers | For Business Partners

Passport Advantage Online offers customers a secure Web experience, allowing them to manage their Passport Advantage accounts online.

[→ Customer sign in](#) ←

### Features and Benefits

Passport Advantage Online enables you to:

[www.ibm.com/software/passportadvantage](http://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 MUST first be associated (and approved) to their respective Site Numbers. If they are not then ALL user requests CANNOT be approved.

Software >

### Self-nomination

---

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.

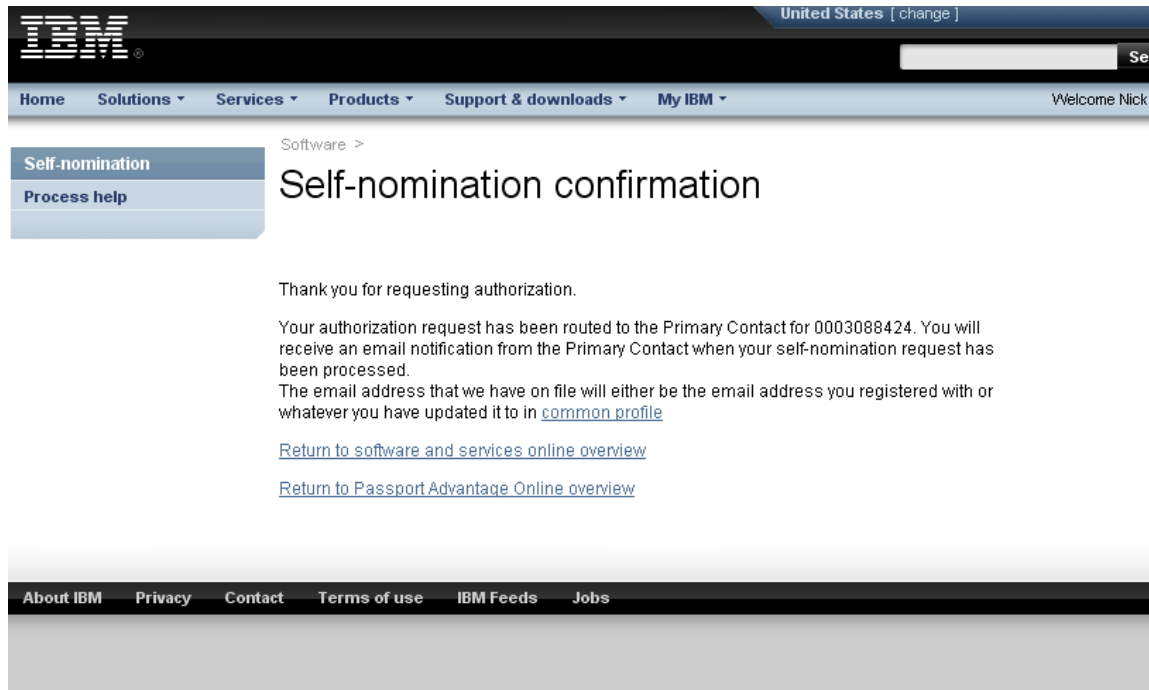
Yes  No ←

---

# Software Download & Media Access

## Self Nomination

A Confirmation Page will appear stating your request will be sent to the designated Primary Contact 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 [call](#) to expedite



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

# Software Download & Media Access

## 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'

Software >

### Software and services online

Access to downloads and account information

For tips to minimize your software download time, see [Download Tips](#) under the News Tab.

#### Software and service offerings

If you need products & services for zSeries visit [ShopzSeries](#)

Navigation help News

- **Software download & media access**  
Download software updates and order software media.
- **Account management**  
Manage contacts, add, change or delete user password and view contract details.
- **Reporting**  
View reports about downloaded software, media order history, entitled software, migration history, purchase history, and active renewal quotes .
- **Reference**  
View reference library, news history, and FAQs
- **Entitlements**  
View Proof of Entitlement certificates, view entitlement allocations, update entitled allocations and view entitlement inventory and deployments.
- **Need assistance**  
View eCustomer Care contact information.

**Related links**

- Terms & conditions
- IBM software support
- Online technical support
- ShopzSeries
- Distributed software online
- Software quote and order
- Value Unit Calculator

# 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.

I agree   I do not agree

Continue

Cancel



# Software Download & Media Access

## Accessing Current Releases

- Select 'Download Finder'

Software > Software and services online > Software download & media access >

## Find downloads & media

Software Download | Media Access

Overview | **Download finder** | Set my preferences

### Overview

#### Software Downloads

Software Downloads provide you on demand access to software product updates for which you have

→ **Download finder** ←

→ Set my preferences

#### eNotifications

eNotification service informs you via e-mail when product upgrades are available for download. To sub preferences and you will be notified when new product upgrades are available. All authorized users of service. You may unsubscribe at any time.

**Software and services online**

- Software download & media access
- Reporting
- Entitlements
- Account management
- Reference
- Need assistance

**Related links**

- Terms & conditions
- IBM software support
- Online technical support
- ShopzSeries
- Distributed software online

# Software Download & Media Access

## Accessing Current Releases

- Select 'View all my downloads' or use the 'Find By' options to display Entitled Software
- Expand the 'Business Analytics' Brand to display your Entitled Software

Software > Software and services online > Software download & media access >

### Find downloads & media

Absa Bank Limited

Software Download | Media Access

Overview | Download finder | Set my preferences

[Download step by step](#) | [Find by description or part number](#) | [View my preferred downloads](#) | [Find by categories](#) | [View all my downloads](#)

Expand and select the files you'd like to download, agree to the terms below, and click "Download now".

+ = Expand      - = Collapse

[View by A-Z](#) | [View by brand](#)

#### All my entitled downloads - by brand

- Business Analytics

+ IBM Algorithmics Credit Manager Foundation Reporting Library Add-On V5.1 Multiplatform English eAssembly (CRK5PEN)

# Software Download & Media Access

## 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.

[View by A-Z](#) | [View by brand](#)

---

All my entitled downloads - by brand

- Business Analytics
  - + IBM Algorithmics Credit Manager Foundation Reporting Library Add-On V5.1 Multiplatform English eAssembly (CRK5PEN)
    - Size 4 files (964mb)
    - Date posted 05-Oct-2012
  - IBM Algorithmics Credit Manager V5.1 Multiplatform English eAssembly(CRK5NEN)
    - Size 4 files (1758mb)
    - Date posted 05-Oct-2012
- IBM Algo Credit Manager Base V5.1 Multiplatform English(CIBL2EN) - [View details](#)
  - Size 849mb
  - Date posted 05-Oct-2012
  - [License agreement](#)
  - [Download estimate](#)
- IBM Algo Credit Manager Quick Start Notes V5.1 Linux English(CIBL4EN) - [View details](#)
  - Size 1mb
  - Date posted 05-Oct-2012
  - [License agreement](#)
  - [Download estimate](#)
- IBM Rational Enterprise Deployment V1.6 Windows Multilingual(CIA7BML) - [View details](#)
  - Size 444mb
  - Date posted 13-Sep-2012
  - [License agreement](#)
  - [Download estimate](#)
- IBM Rational Enterprise Deployment V1.6 Linux x86-64 Multilingual(CIAF0ML) - [View details](#)
  - Size 464mb
  - Date posted 13-Sep-2012
  - [License agreement](#)
  - [Download estimate](#)

# Software Download & Media Access

## Accessing Current Releases

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

---

### Review downloading specifics & click "Download now"

Download method: Download Director (recommended) [Update](#)

Download location: US Site [Update](#)

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By clicking the "I agree" button, you agree that (1) you have had the opportunity to read and understand the multi-product package terms, if any, and (2) the terms of the license agreement(s) govern this transaction. If you do not agree with the agreement(s), you will be unable to download the software.

I agree

I do not agree

---

# 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.
- Select Contact Update to review or update the 6 designated Contacts within your company

## 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.

**Software and services online**

- Software download & media access
- Reporting
- Entitlements
- Account management
- Reference
- Need assistance


Software >

### Software and services online

Access to downloads and account information

For tips to minimize your software download time, see [Download Tips](#) under the News Tab.

**Software and service offerings**



If you need products & services for zSeries visit [ShopzSeries](#)

**Navigation help**

<p><a href="#">→ Software download &amp; media access</a> Download software updates and order software media.</p> <p><a href="#">→ Reporting</a> View reports about downloaded software, media order history, entitled software, migration history, purchase history, and active renewal quotes</p> <p><a href="#">→ Entitlements</a> View Proof of Entitlement certificates, view entitlement allocations, update entitled allocations and view entitlement inventory and deployments.</p>	<p><a href="#">→ Account management</a> Manage contacts, add, change or delete user access, change password and view contract details.</p> <p><a href="#">→ Reference</a> View reference library, news history, and FAQs.</p> <p><a href="#">→ Need assistance</a> View eCustomer Care contact information.</p>
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- Related links**
- Terms & conditions
  - IBM software support
  - Online technical support
  - ShopzSeries
  - Distributed software online
  - Software quote and order
  - Value Unit Calculator

# Software Download & Media Access

## 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

**NOTE:** Access to Fix Central (Algo Fixes and Patches) is enabled to those IBM IDs that have been correctly associated to either a Customer Number or Site Number with active S&S.

← IBM Support Portal

**Fix Central**

- Fix Central
- Inventory upload
- Supported products
- Enhancements
- Help
- Feedback

→ Go to Fix Central mobile

**Notice**

⚠ There is a planned maintenance outage on Wed, 20 Nov. 2013 from 5:00 p.m. to Thur, 21 Nov. 2:00 a.m. Central Time (CT). Fix Central may be unavailable during this time.

Fix Central provides fixes and updates for your system's software, hardware, and operating system.

For additional information, click on the following link.

📄 Getting started with Fix Central

Select product Find product

Select the product below.

When using the keyboard to navigate the page, use the **Alt** and **down arrow** keys to navigate the selection lists.

Product Group

Algorithmics

Select from Algorithmics

Select one

- Select one
- Algo Audit and Compliance
- Algo Capital Modeling
- Algo Collateral
- Algo Credit Administrator
- Algo Credit Limits
- Algo Credit Manager
- Algo Financial Modeler
- Algo Integrated Risk Reporting Platform
- Algo One
- Algo OpVar
- Algo Portfolio Business Review

or IBM machines that are under warranty or de for operating systems or other software plicable software warranty or IBM software Code updates, samples, fixes or other

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

**How to contact IBM Algorithmics Support**  
**IBM Support Portal**

**Customizing the site, searching the Knowledge Base  
and signing up for ‘Notifications’**



# Support Portal

Customizing your online Experience  
[www.ibm.com/software/analytics/support/](http://www.ibm.com/software/analytics/support/)  
Algorithmics content coming soon

IBM Software > Business Analytics > Client Center >

## Business Analytics Client Center

Find information and support for your products

Select your product family to get started!

- SPSS
- Cognos
- OpenPages
- Clarity
- Algorithmics
- Varicent

---

<b>Top support resources</b> <ul style="list-style-type: none"><li>→ IBM Support Portal </li><li>→ Online Service Requests</li><li>→ Knowledge base and documentation</li><li>→ Troubleshooting</li><li>→ Support Community for your product</li></ul>	<b>Downloads</b> <ul style="list-style-type: none"><li>→ Fix Central</li><li>→ Business Analytics Trials and Demos</li><li>→ Download Purchased Software</li><li>→ Business Analytics Evaluation Software</li></ul>	<b>Contact us</b> <ul style="list-style-type: none"><li>→ IBM Support - online</li><li>→ IBM Support - telephone</li><li>→ Sales Representatives</li><li>→ Business Analytics Training</li><li>→ Contracts and Orders</li><li>→ Feedback</li></ul>
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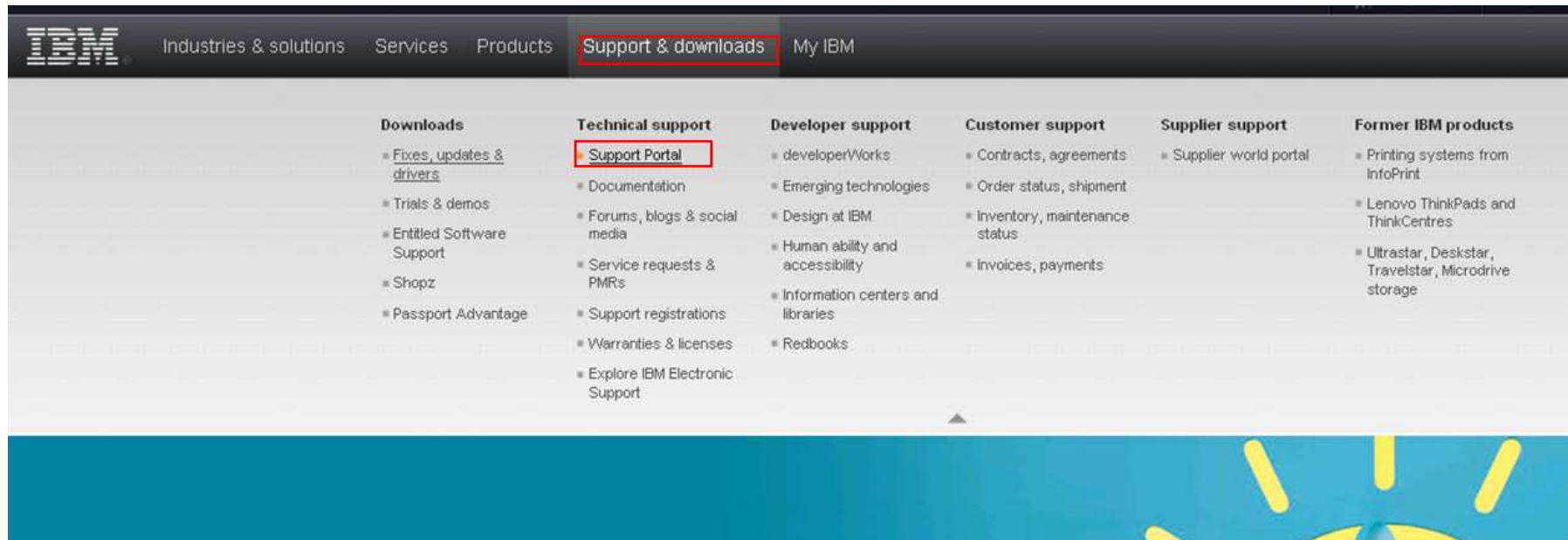
<b>IBM Business Analytics Training</b> Choose from a variety of training options ranging from instructor-led to self-paced options to suit your needs and budget.	<b>Get Involved</b> Share your story and experience with other customers and analytics communities	<b>IBM Support Portal</b> Centralized website for access to all online technical support content and tools.
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Or just navigate there from the ibm.com homepage

[www.ibm.com](http://www.ibm.com)

-> Support & Downloads

-> Support Portal (Technical Support)



## NEW! Simplified Support Portal Interface – Customize your experience

[www.ibm.com/support](http://www.ibm.com/support) or [support.ibm.com](http://support.ibm.com)

### Support Portal

Product lookup:  ▼

[Share your list of recently viewed products](#)

- Browse for a product
- My products

### Search support and downloads

Search:

[Tips](#)

### My support programs

[Sign In](#) to access your support programs.

### Common support links

- [Sign in](#)
- [Service requests & PMRs](#)
- [ESC+ for hardware and firmware service requests](#)
- [Security bulletins](#)
- [Support registrations](#)
- [Go to IBM Support mobile](#)
- [Directory of worldwide contacts](#)
- [Site assistance](#)
- [Feedback](#)
- [Electronic Support forum](#)
- [Current site availability](#)

# Support Portal Interface

Select a product to display product specific information

The screenshot displays the Support Portal interface. At the top, the title "Support Portal" is visible. Below it, a "Product lookup:" field contains the text "Algo". To the right of this field is a "Browse for a product" button. A dropdown menu is open, showing "Matches within recently viewed products" with one item: "Algo Capital Modeling not applicable". Below this, "Matches within all products" lists several items, with "Algo One" selected. To the left of the main content, there are sections for "Search support" and "My support page" with a "Sign In" link. A modal window titled "Algo One" is open, allowing selection of a product version (4.5.x, 4.5.4, 4.5.0, 4.4.x, 4.4.0, 4.3.0, 4.2.0, 4.1.0, 4.0.0, or not applicable) and an optional operating system (AlX, Red Hat Enterprise Linux (RHEL) Client, (RHEL) Server, (RHEL) Workstation, (RHEL), or Slnara). A "Go" button is at the bottom of the modal. Below the modal, a list of links is provided: "Support registrations", "Go to IBM Support mobile", "Directory of worldwide contacts", "Site assistance", "Feedback", "Electronic Support forum", and "Current site availability".

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

## Algo One

**Product lookup:**    
[Share your list of recently viewed products](#) [Browse for a product](#) [My products](#)

---

**Search support and downloads**

Search:   [Tips](#)

Search only Algo One

---

### Downloads

→ Downloads (fixes & PTFs)

### Product support content

- Product documentation (manuals)
- Plan and install documentation
- Flashes and alerts
- Troubleshooting documentation
- All product support content

### Tools and resources

- Open a new service request - sign in
- Product support lifecycle
- Product tools and utilities
- ✖ Subscribe to support notifications
- 📖 IBM Support Portal Adviser
- 🗣️ Forums, blogs and social media

### Featured links [\(view all\)](#)

- Algorithmics Customer Center
- RSS feeds of support content
- Request e-mail updates
- Support Offerings
- Why renew your Support?

### Common support links

- 🔑 Sign in

# Search the Support Knowledgebase & Refine results

Support Portal >

## Algo One

**Product lookup:**      
 *Share your list of recently viewed products*

---

**Search support and downloads**

Search:   [Tips](#)

Search only Algo One

---

**Downloads**  
→ [Downloads \(fixes & PTFs\)](#)

---

**Tools and resources**

---

**Product support content**

- [Product documentation \(manuals\)](#)
- [Plan and install documentation](#)
- [Flashes and alerts](#)
- [Troubleshooting documentation](#)
- [All product support content](#)

---

**Featured links** ([view all](#))

---

**Refine search**

**Task**

- Install
- Plan
- Troubleshoot
- Unspecified
- Use

---

**Current Selections**  
- Viewing All

---

**Content Type**

- Authorised program analysis report
- Documentation index
- Driver
- Educational program
- Fix readme
- Preventative service planning
- Product administering information
- Product configuration information

---

**Current Selections**  
- Viewing All

---

**Subject**

.....

# Customized Support Portal view (Algo One)

## Subscribing to and managing Support Notifications

Support Portal >

### Algo One

Product lookup:

#### Search support and downloads

Search:   [Tips](#)  
 Search only Algo One

#### Downloads

→ Downloads (fixes & PTFs)

#### Product support content

- Product documentation (manuals)
- Plan and install documentation
- Flashes and alerts
- Troubleshooting documentation
- All product support content

#### Tools and resources

- Open a new service request - sign in
- Product support lifecycle
- Product tools and utilities
- Subscribe to support notifications**
- 
- 

#### Featured links [\(view all\)](#)

- Algorithmics Customer Center
- RSS feeds of support content
- Request e-mail updates
- Support Offerings
- Why renew your Support?

#### Search support and downloads

Search:   [Tips](#)  
 Search only Algo One

#### Downloads

→ Downloads (fixes & PTFs)

#### Product support content

- Product documentation (manuals)
- Plan and install documentation
- Flashes and alerts
- Troubleshooting documentation
- All product support content

#### Tools and resources

- Open a new service request
- Product support lifecycle
- Product tools and utilities
- Manage your support notifications**
- 
- 

#### Featured links [\(view all\)](#)

- Algorithmics Customer Center
- RSS feeds of support content
- Request e-mail updates
- Support Offerings
- Why renew your Support?

# Managing Support Notifications:

## Customize products, content and frequency of communication from IBM

← Return to IBM Support Portal

IBM Support Portal

Subscriptions

Help

Feedback

Related links

- Lenovo support
- InfoPrint support

### My notifications

for IBM technical support

My subscriptions **Subscribe** My defaults Help

Select your product **Search for your product**

Create a subscription by searching for a product.

Search all words:  
Algo

**Search**

#### Search results

Select a link below to create a subscription. Note: The header links will allow you to subscribe to multiple products at the same time. The individual product links will create a subscription for that product only.

**Information Management**

- [Algo Audit and Compliance](#)
- [Algo Capital Modeling](#)
- [Algo Collateral](#)

#### Notify me by

- Email
  - Daily email  Weekly email
  - Plain text email  Html email
- Delivery to this folder
- Delivery via syndication feed (RSS,Atom)  
[What is this?](#)

#### Document types \*

Select/deselect all

- Flashes
- News
- Downloads and drivers
- Fixes
  - Recommended
  - High-Impact / Pervasive (HIPER)
  - Security Vulnerability (Sec/Int)
- 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

- 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 such as:

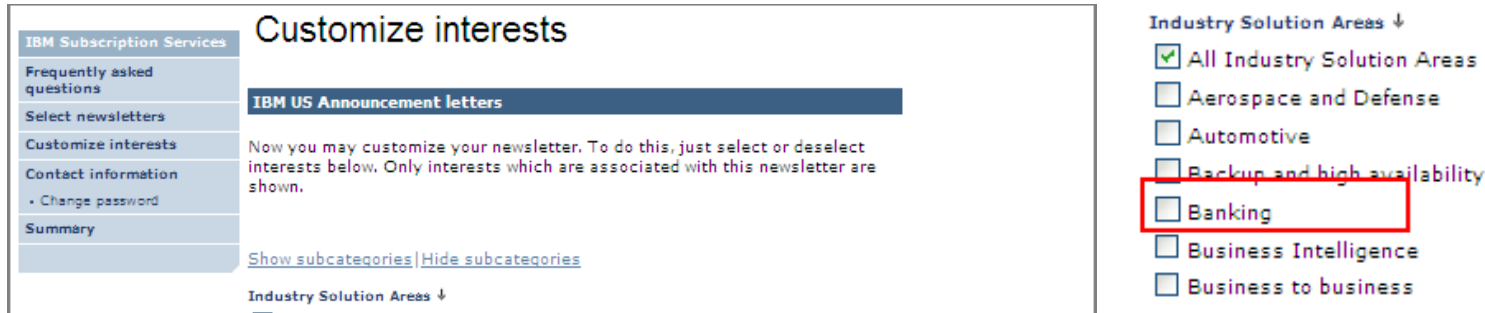
- **IBM Training News**

Get late-breaking news on technical training offerings that are important to you! This e-newsletter is delivered monthly and will be tailored according to the interest areas you select in the below subscription form. Learn about new and updated courses, e-learning, no-travel training options, books, certification testing, conferences, training services, special offers and more. It's customized to save you time, reduce clutter, and provide the information you need to build your skills quickly.

- **IBM Electronic Support News**

Subscribe to IBM Electronic Support News and stay up-to-date with IBM's portfolio of online tools, tips, and resources to keep your systems, software, and applications running smoothly.

- Customize your interest by selecting your Industry Solution Areas (for example Banking)



The screenshot shows the 'Customize interests' page for 'IBM US Announcement letters'. On the right, under 'Industry Solution Areas', the following options are listed:

- All Industry Solution Areas
- Aerospace and Defense
- Automotive
- Backup and high availability
- Banking**
- Business Intelligence
- Business to business

- 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

### How to contact IBM Algorithmics Support

#### The Service Request Tool

**\*Creating Service Requests (SR) online and by phone.**

- **Requesting access and site functionality**

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

## How do I contact IBM Algorithmics Support? -> Open a Service Request

### **You have two avenues to open a Service Request and contact IBM Algorithmics Support:**

1. Open a Service request online - The Service Request Tool **(Recommended)**
  - Allows you to maintain a user profile which simplifies and shortens the service request creation process
  - Shorter communication path to the experts (No intermediaries)
  - Real time support request management – view updates made by IBM and get immediate notifications
  - Reporting capabilities – SR has comprehensive reporting capabilities. Sort and filter your report to your liking and even download it to a spreadsheet to allow further customization
  
2. Call your Local Support Centre and a Call Receive Agent will open a Service Request on your behalf
  - Navigate to [www.ibm.com/planetwide](http://www.ibm.com/planetwide)
  - Select your country and dial your local support number

# IBM Service Request Tool - How to request access

## SR Assistance Page

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

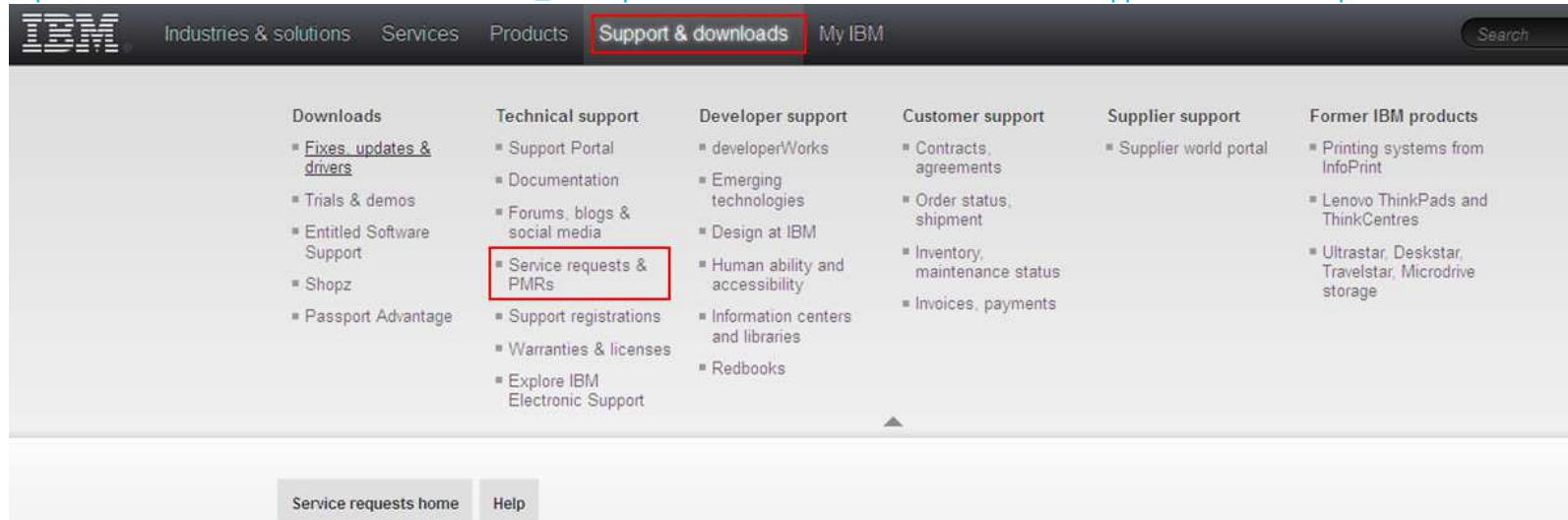
### Summary on how to get access to the SR Tool

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

# IBM Service Request Tool - Requesting Access

\* Register and/or Sign In

[https://www.ibm.com/xsrAuth/authenticate?ok\\_url=https%3A%2F%2Fwww-946.ibm.com%2Fsupport%2Fservicerequest%2FHome.action](https://www.ibm.com/xsrAuth/authenticate?ok_url=https%3A%2F%2Fwww-946.ibm.com%2Fsupport%2Fservicerequest%2FHome.action)



[Service requests home](#) [Help](#)

## Service requests & PMRs

### Sign in with your IBM ID

If you don't have an IBM ID, [register now](#).

IBM Employees: [Sign in with your intranet ID](#).

**IBM ID:**

**Password:**

[Forgot IBM ID?](#) [Forgot password?](#) | [Change password](#)

#### Hardware support

ESC+ for online hardware and firmware service requests

#### Software support

The IBM Service Request (SR) a (formerly called Problem Management) tool allows you to report and track software issues.

You can use SR to report problem

[Sign in](#)



# IBM Service Request Tool - Requesting access

## Self Nomination to a new or additional ICN

IBM Industries & solutions Services Products Support & downloads My IBM

Service requests home New service request Search My profile My messages Help

### Service requests home

Manage support registrations

- ➔ Support registrations
- ➔ User administration
- ➔ Partner administration

Hardware support

#### IBM Service Request news

12 Nov 2013

### Support registrations

Access to IBM software support services such as IBM Support portal, Fix Central and IBM Service Request require that you register. You may register with your IBM customer number or machine type and serial number. Please select an option below to begin the registration process.

- By customer
- By machine type and serial number

Please enter your customer information below. If you dont know this information, your organizations contracting or purchasing office may be able to help you.

IBM customer number\*

Country/region \*

Select one

If you do not see your country/region in the list, please contact [IBM country/regional support](#) to determine which country/region you should choose.  
[Get Adobe® Reader®](#)

Justification

Request additional access



# IBM Service Request Tool

## 3 levels of access

- **IBM Service Request User Access Levels:**

There are three access levels for the Service Request application. The following table contains general guidelines for the access levels in SR. All SR functions not listed in the table are the same regardless of access level.

Function	Basic	Full	Admin/STC
Create a service request	X	X	X
Update a service request that I create	X	X	X
Update a service request that my coworkers create		X	X
Associate other people with service requests that I create		X	X
Search for closed and archived service requests		X	X
Add and manage user access to SR for others in my company			X
Approve user access requests			X

# IBM Service Request Tool - User Administration

## Manage access to the SR Tool

[← Return to Service Request](#)

Support registrations

**User administration**

Partner administration

Help

## User administration

Update Add Copy Auto approval New requests

To limit your pending relationship request to one agreement, select the radio button for that agreement.

You have relationship requests for the following agreements:

### Search criteria

▼ Search criteria

Show users across all my agreements

Show users only on  
(Press the Ctrl o  
517700 8 1 1

▶ Additional filter criteria

Show or update list below

➤ Add a user to your agreements

A | B | C | D | E | G | H | J | K | L | M | N | P | R | S | T | V | W | # | All



# IBM Service Request Tool: User Administration

## Update existing user

**Show users only on selected agreements**

(Press the Ctrl or command key while selecting to choose multiple agreements)

- ▶ **Additional filter criteria**

Show or update list below

A | B | C | D | E | G | H | J | K | L | M | N | P | R | S | T | V | W | # | All

---

**Users by name**

---

Lisa Anderson user.email@domain.net Add to a new agreement

nnnnn [United States]    **Status:** Active   
**Access level:** Full (Current)

Update user relationships

# IBM Service Request Tool - User Administration

Add a new user

## Add an authorized user relationship

Update Add Copy Auto approval New requests

### New user for this agreement

IBM ID:\* user.email@domain.net

Access level:\* Full (Current) ↑ ↓ Demote

Link authorized user with all agreements  
 Link authorized user with selected agreements

(Press the Ctrl or command key while selecting to choose)

nnnnnn! [United States] nnnnnn

### New user for this agreement

Please note the following items before continuing:

Registration ID.

### New user for this agreement

The user has been added to the support agreement.

IBM ID:\* email.user@domain.net

Access level:\* Full (Current) ↑ ↓

Add user

# IBM Service Request Tool: User Administration

## Assign an Auto approval Email domain

[← Return to Service Request](#)

Support registrations

**User administration**

Partner administration

Help

## User administration

Update Add Copy Auto approval New requests

Manage a list of email domains that will be auto approved for basic and full access. You may also specify a list of email addresses to be exempted from basic and full access auto approval.

Auto approve email domain (9)

Email addresses not be auto approved (0)

[Add approved email domain](#)

Manage a list of email domains that will be auto approved for basic a also specify a list of email addresses to be exempted from basic and

### Add approved email domain

#### Add email domains for auto approval

Enter a domain name\*

Access level\*  
Basic

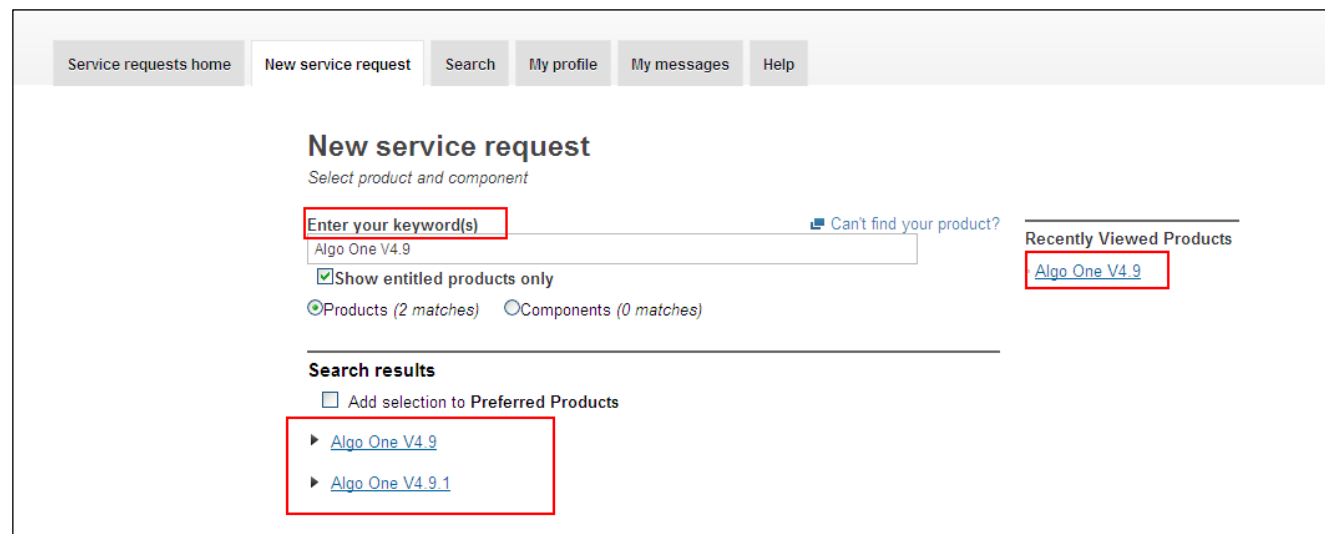
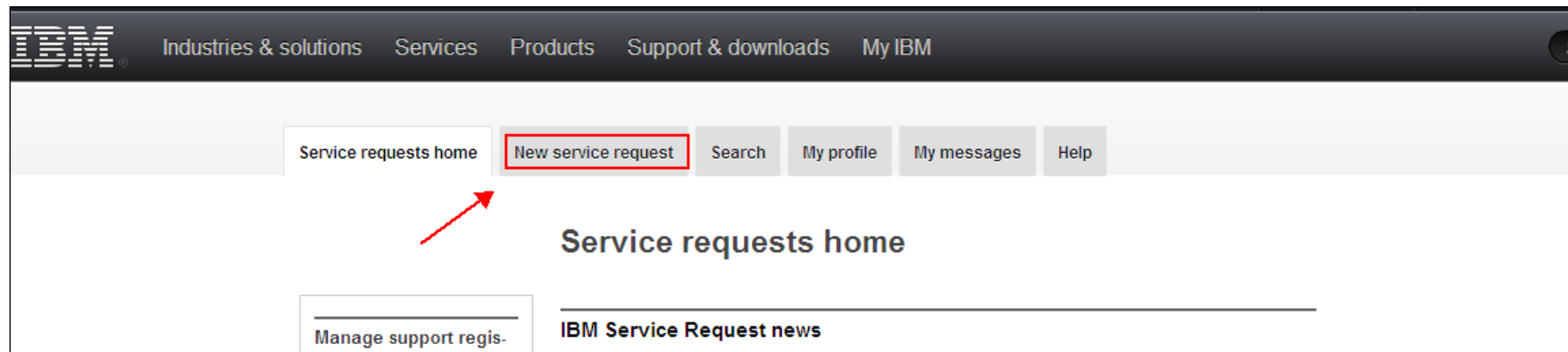
IBM customer number\*

Add email domain

# IBM Service Request Tool

Open a new Service Request to get help

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





# IBM Service Request Tool

## Problem Description, updating interested users

Service requests home | **New service request** | Search | My profile | My messages | Help

### New service request

Complete problem description

Status *Not saved*

#### Product

← Algo One V4.9

#### Component

← Algo One 4.9.0

#### Agreement

#### Interested users

- AXULAR BILBAO PRESA

Update interested users

#### Business partners

No business partners are associated with this service request.

Associate business partners

#### 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](#).

#### Problem information

Title \*

(256 character limit)

#### Problem description \*

(12 KB limit. Use file attachments to include more data, such as diagnostic files or [IBM Support Assistant](#) collector files.)

# IBM Service Request Tool

## Severity, Business Impact, upload attachments

### Service request qualifiers

Severity\*  1  2  3  4 [Severity levels](#)

How is this problem impacting your business?\* [What is business impact?](#)

(256 character limit)

System is down

Request type\* [Help](#)  
 Software Defect Support  
 Software Usage Support

Please select your operating system which will ensure the proper routing of your service request

Operating system\*

### Additional information

Customer tracking ID  [Help](#)  
(20 character limit)

### Attach additional files

Select file to attach  No file selected.  
(2 GB limit per file)

Files in queue *None*

# IBM Service Request Tool

## Preferred contact method, summary

# IBM Service Request Tool

## Confirmation Page, assignment Service Request number

**Service requests home**

New service request

Search

My profile

My messages

Help

## New service request

*Service request submitted*

### Success!



Your service request number is [38808 514 000](#).

Customer support will call you at phone number: [REDACTED]

[← Return to the IBM Service Request home page](#)



# IBM Service Request Tool

## Search for, review and run reports on Service Request

The screenshot displays the search interface of the IBM Service Request Tool. At the top, there is a navigation bar with links for 'Service requests home', 'New service request', 'Search', 'My profile', 'My messages', and 'Help'. The main section is titled 'Search' and contains several filter options:

- Filter list content:**
  - Search my service requests submitted online only
  - Search all service requests
    - Include archived service requests  
Note: Searching the archive will take longer to return results. Please be patient.
- IBM Customer number:** A dropdown menu currently showing 'All'.
- Enter keywords to refine your search:** A text input field.
- Service request number:** Two input fields.
- Show service requests up to today's date
- Show service requests by date range [Help](#)

A detailed view of the search filters is shown in a separate window on the right:

- Show service requests by date range [Help](#)
- Created within range
- Updated within range
- Closed within range  
Note: this option is valid only when you have selected the Show closed service requests option below.
- From**  **To**  M/d/yyyy format
- Filter service requests by criteria below**  
Completed fields will be used as additional filter criteria; blank fields will not be used.
- Show open service requests
- Show closed service requests
- Component ID:**
- Severity:**  All  1  2  3  4
- Search** button

# IBM Service Request Tool

## Update your personal profile

Contact Notification Display Preferred products Saved searches DA

The fields indicated with 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.

The information you provide will be used to validate your entitlement and communicate with you about your service requests.

---

**My profile**

First name\*

Last name\*

Email address\*

Contact Notification Display Preferred products Saved searches DAC

The fields indicated with 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.

The information you provide will be used to validate your entitlement and communicate with you about your service requests.

---

**My language**

Please indicate the language in which you wish to receive notifications and e-mails. (Note: application web pages are always displayed in the closest supported language you have specified in your browser's language settings.)

Language  ▼

I am also willing to work in English

By checking the box above, you are indicating that you are willing to get responses to service requests in English, if that support is available in your country or region.

---

**For service request changes**

Please indicate whether you want to be notified when your service requests at each severity level are updated or closed.

Severity	Notify on update	Notify on closure
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

---

For changes in my user status

# Thank you

for your time  
for having attended this Client Experience Webinar

- Q&A
- Any questions after this call?
  - > Please open a Service Request

If you are unable to open a Service Request online or by phone, please contact the BA Client Care Team at: [clientcare@ca.ibm.com](mailto:clientcare@ca.ibm.com)

## Quick Link resources:

- Passport Advantage (eCustomer Care) Global listing

[https://www.ibm.com/software/howtobuy/passportadvantage/paocustomer/docs/en\\_US/ecare.html](https://www.ibm.com/software/howtobuy/passportadvantage/paocustomer/docs/en_US/ecare.html)

- IBM Electronic Support help page

[www.ibm.com/support/electronicssupport/overview.html](http://www.ibm.com/support/electronicssupport/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](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](http://www-947.ibm.com/support/entry/portal/scheduled_tech_exchanges)