Service Profile Management (SPM) Users Guide

Intentionally Left Blank

Table of Contents

GETTING STARTED

1.0 Overview

The **Service and Support Profile Management System,** or SPM (formerly known as SPDB) manages the IBM Warranty Authorized Business Partner business and Entitlement for PCD support. This includes support for Service Partners, Business Partners, Authorized Service Providers, HelpPack users, Large Accounts and Other Service Providers.

1.1. Software Requirements

- Windows Operating System
- Internet Explorer 6.x and higher

2.0 Signing into SPM

Step 1: Open a web browser session.

Step 2: Enter the SPM URL into the browser **Address:** field.

> ***Note:*** *The URL for SPM is* ***http://www.ibm.com/pc/partner/spm/***
>
> ***Important Note:*** *If you are attempting to access the SPM website using a previously saved bookmark, you may receive an error. This is due to slight change in the SPM R4.2 URL. Please delete your previous bookmark, access the SPM R4.2 application using the URL above, and recreate your bookmark with the new URL.*

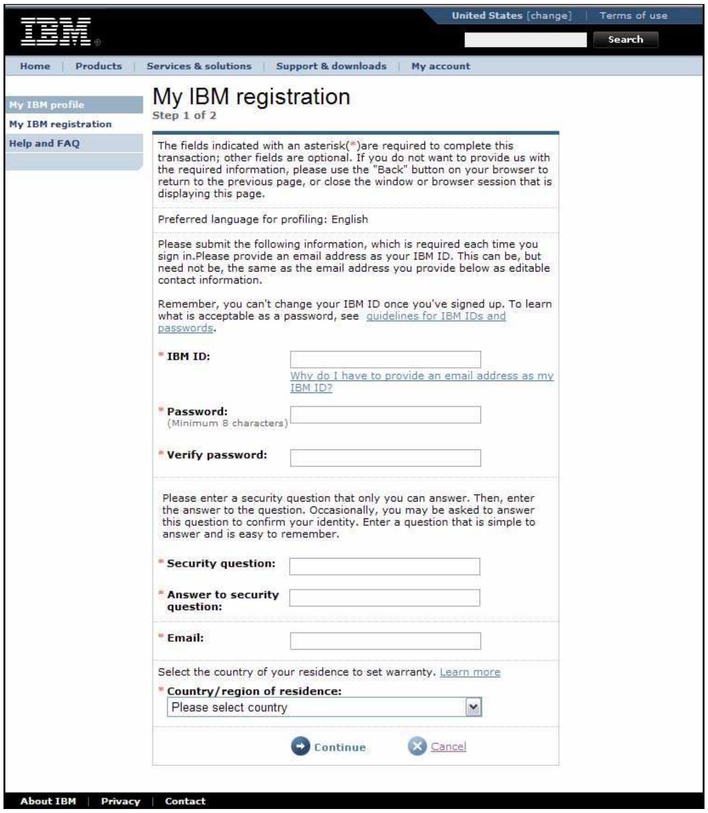
Step 3: Click **Go** or press **Enter**. The **IBM SPM** (Service and Support Profile Management**)** page is displayed:

Step 4: Click The SPM **Sign In** page is displayed:

2.1. IBMRegistration

Step 5: If you have not registered previously, click the **register** link, located on the SPM Sign in page (see screenshot below). If you have already registered, skip to ***Step 11***.

The **My IBM registration** page (Step 1 of 2) is displayed



Step 6: Enter the following required information:

. • **IBM ID:** *Enter your email address here. This will be your IBM ID*

. • **Password:** *Minimum of 8 characters*

. • **Verify Password**

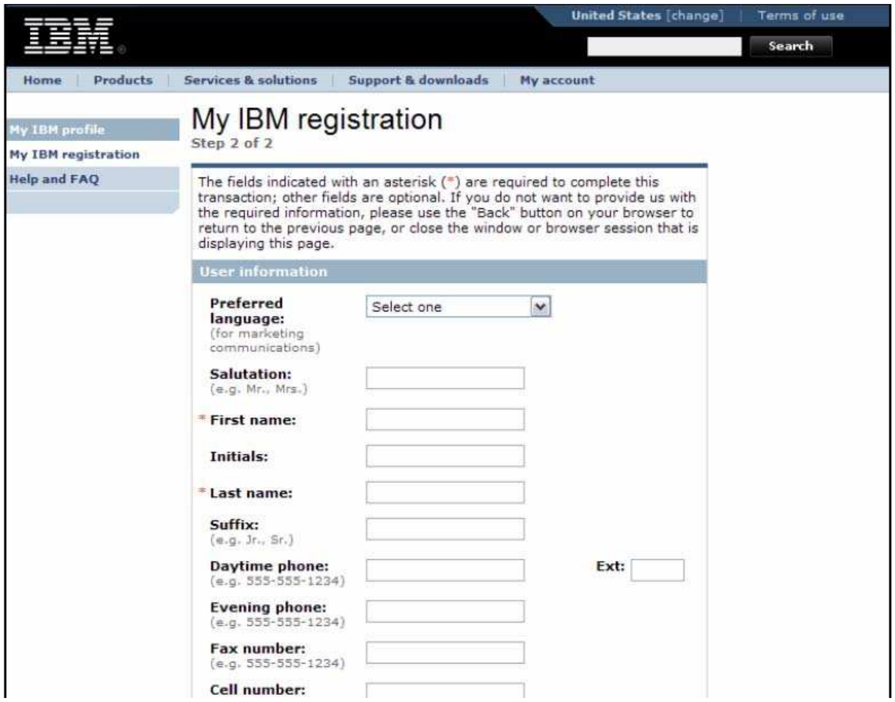
. • **Security Question**

. • **Answer to Security Question**

. • **Email:** *Re-enter your email address here.*

. • **Country / region of residence**

Step 7: Click The **My IBM registration** page (Step 2 of 2) is displayed.



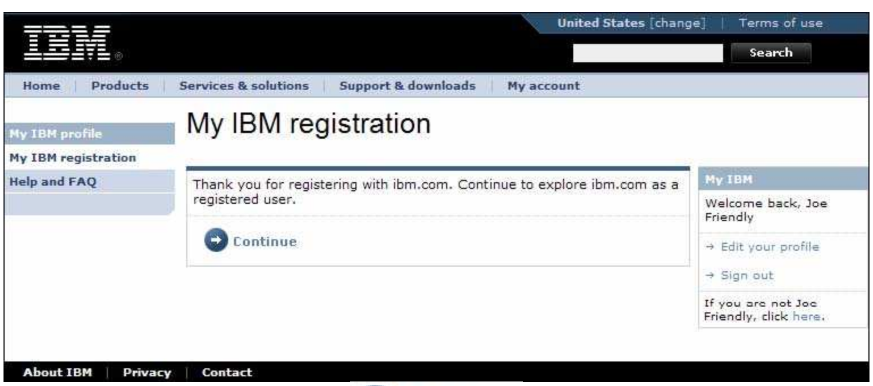
Step 8: Enter the following required information:

- **First name**
- **Last name**

Note: *Other optional fields are available on this page and may be used to provide additional detail to the user profile.*

Step 9: Click 

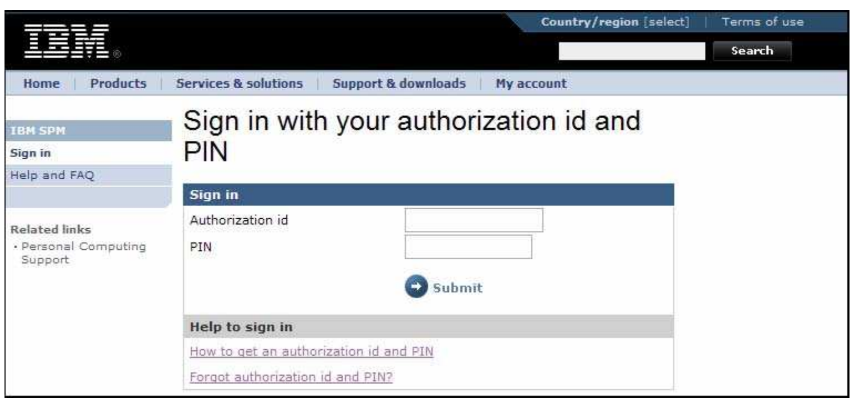
. The **My IBM registration** page is displayed, confirming that IBM registration is complete.



Step 10: Click Continue

The SPM **Sign in** page is displayed:

Step 11: From the SPM Sign in page, enter the **IBM id** and **Password** created during IBM Registration (see Step 6 above). Click Sign in. If this is your first time signing in, The **Authorization Id and PIN** page is displayed.



If you have signed in previously, this page is not displayed. Instead, the IBM SPM page is displayed (see step 13.)

Important Notes:

- *If you have not yet requested an Authorization id and PIN, click on the How to get an authorization id and PIN link and follow the instructions for your geography.*
- *If you have forgotten your authorization id and PIN, click on the Forgot authorization id and PIN? link and follow the instructions for your geography.*

Step 12: Enter your **Authorization id** and **PIN.**

Note: *The entry of Authorization ID and Pin is only performed the first time you log into SPM. However, you may be asked to reference the Authorization ID and Pin at a later date.*

Please keep them in a safe place.

Step 13: Click .

The **IBM SPM** page is displayed.

You are now signed into the SPM site.

3.0 Navigation

SPM uses standard World Wide Web navigation. If you are familiar with the Internet, navigation on the SPM site will be easy to learn.

This chapter discusses standard World Wide Web navigation that is appropriate to the SPM site. It offers a basic understanding of the parts of the screen and how to use them.

At the end of this chapter, you should have a good understanding of how to move around at the SPM site. You will become familiar with:

.• Parts of the screen
a. ○ Internet Explorer
b. ○ SPM site
c. ○Links to sites within SPM
d. ○Links to non-SPM sites
. • SPM Navigation Menu
. • Cursor Functions
. • Lists, buttons, boxes hyperlinks and other SPM objects
. • Search

3.1. Web Browser

Internet Explorer is a common web browser used to access the internet. The screenshot below uses Internet Explorer to demonstrate basic navigation common to most web browsers. Please reference help documentation for your web browser should you have any additional questions regarding its use.

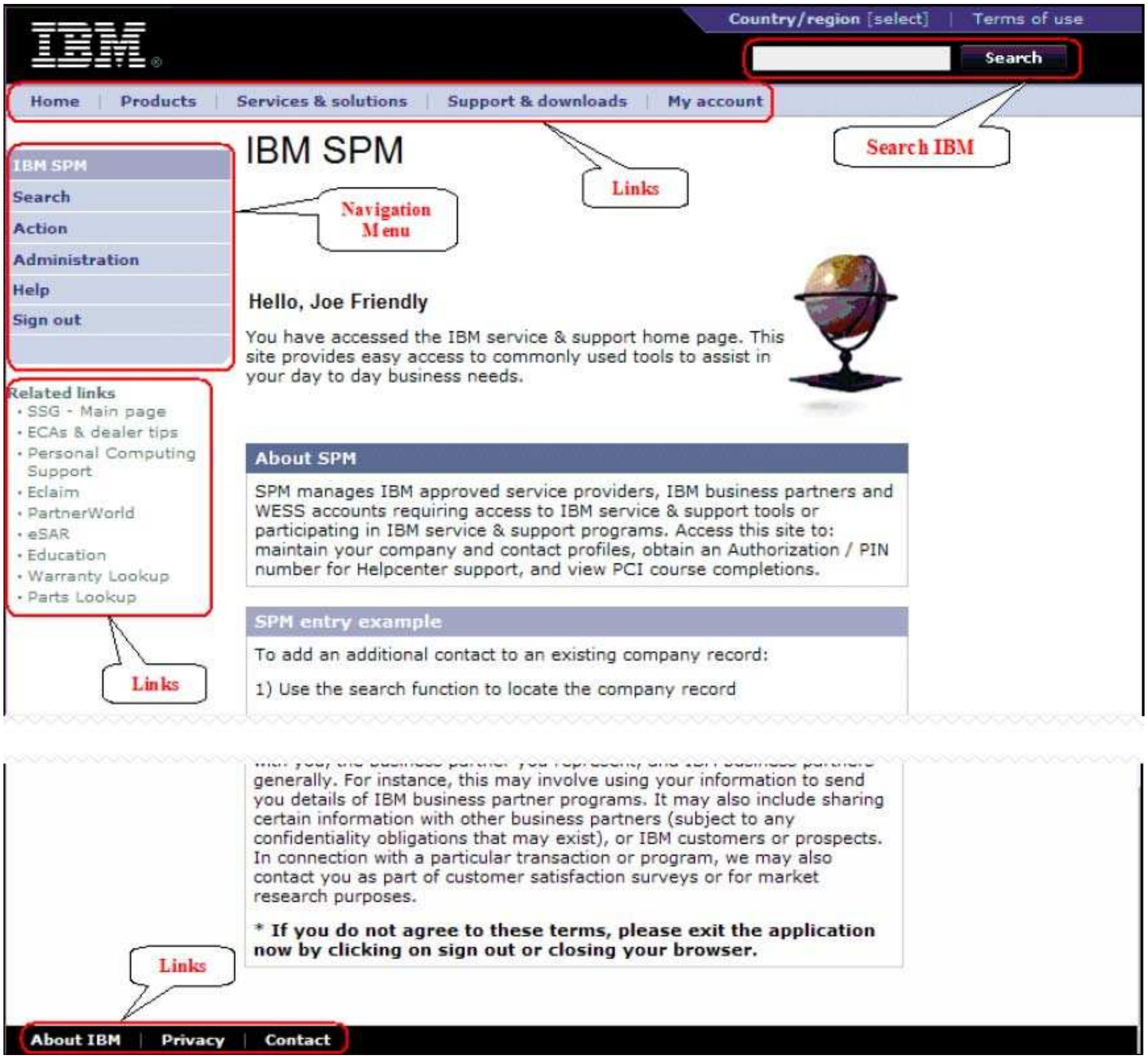
Address Bar: The SPM URL is entered into the Address Bar.

Tool Bar: Internet level commands are found on the Toolbar.

Standard Buttons: Examples of typical Standard buttons are Back, Stop, Home and Search.

3.2. SPMScreen

The following screen represents what is displayed after you have successfully logged into SPM. Various navigational features are pointed out below.



Search IBM: Allows the user to enter search criteria for information across all of IBM.
Important Note: You must use the SEARCH feature from the navigation menu to search for SPM specific data.

Navigation Menu: Allows the user to navigate between functions within the SPM application. *Note: Functions available may vary based on the logged in user's level of access to the SPM application.*

Links: The following links to other IBM websites are accessible from the SPM home page:

- **Home** – Links to the www.ibm.com home page
- **Products** – Links to the IBM products page
- **Services & solutions** – Links to the IBM Services and Solutions page
- **Support & downloads** – Links to the Support & downloads site, from which you can search for downloads, technical support, and access other related links.
- **My account** – Links to the My account site from which you can make online purchases, subscribe to IBM newsletters, view your IBM homepage preferences and link to the education and training site to view your IBM course history.

Related Links:

- **SSG – Main page –** Links to the Service Support Guide used in IBM service and support profile management.
- **ECAs & dealer tips –** Links to a website where you can search for ECAs and dealer tips by Brand, Family, Machine Type, and/or Model.
- **Personal computing support –** Links to the IBM Personal computing support page, where you can browse for various support information by product, such as drivers and downloads, publications, and warranty information.
- **Eclaim –** Links to the Eclaim.com website.
- **PartnerWorld –** Links to the PartnerWorld website.
- **eSAR –** Links to the electronic Solution Assurance Review application.
- **Education –** Links to the IBM PC Institute business partner website.
- **Warranty Lookup –** Links to the IBM warranty status website, where you can enter a valid machine type and serial number to obtain current product warranty status, as well as international warranty information.
- **Parts Lookup –** Links to the IBM Parts lookup website, where you can enter a valid machine type and serial number to obtain a list of parts shipped with the system.

Other Links:

- **Business Partner Support Site -** Links to the Business Partner Support at IBM site.
- **About IBM -** Links to the About IBM site, where you can get company information and the corporate address and phone number for IBM.

- **Privacy -** Links to the Privacy site where you are given IBM's privacy practices on the web.
- **Contact -** Links to the Contact site where you can link to the Technical support directory and customer support contacts sites. Phone numbers for shopping assistance, small businesses, general inquiries, Gold Web Site problem, and TTY services are given. You will also find the mailing and e-mailing addresses for IBM Corporate and links to self-help resources (Frequently asked questions, Support & downloads, and Online shopping help) and a directory of IBM Worldwide contacts.

Note: *The default country selection for all links to other IBM websites referenced from within SPM is United States. Please be sure to change and save your country settings by clicking on the* ***change*** *link located at the top of the SPM Sign in page or www.ibm.com home page (see screenshot below). This will enable quick access to country specific links to other IBM websites from within the SPM website. This will NOT change your country specific settings from within SPM itself.*

3.3. SPMNavigation Menu

Once you have successfully logged into SPM, a list of accessible functions will be presented on the left side of your screen. This is the **SPM Navigation Menu**. You will use the **Navigation Menu** to move from one SPM function to another.

The **Navigation Menu** is divided into the following categories and subcategories:

- **IBM SPM –** This link takes you to the SPM welcome page.
- **Search –** This link takes you to an SPM internal search page. From here, you can search for a company, contact or user by entering specific search criteria.
- **Action –** This link allows you to create a BP, SP, OSP, or WESS companies or contacts, as well as Helppacks. You can also access pending approvals and changes from here.

  a. **Create BP/SP/OSP/WESS Company –** Create new companies using this link.
  b. **Create SP Application –** Send the Service Partner application to a company who wants to become an IBM Service Partner using this link.
  c. **Create contact –** Use this link to create a contact with or without an associated company.
  d. **Create helppack –** Use this link to create a user and add a helppack.
  e. **Pending Approvals –** When new companies or applications are submitted to SPM, approvals are given using this link. Entitlement renewals are also listed.
  f. **Pending changes –** When company or contact changes are made and submitted, they can be viewed and approved using this link. New internal user registrations are also displayed here for approval.

- **Administration –** Links associated to administration of the SPM application are displayed here.

g. **Enterprises –** From this link, companies having several locations can be rolled up into one grouping, or Enterprise, for viewing, notification and access purposes.

h. **Roles –** Roles are the job responsibilities available to a user. The role defines the items displayed on the Navigation Menu, as well as what access the user has within them once signed into the SPM application. From this link, roles can be created, modified, and deleted.

i. **Notifications –** A notification is an automated communication sent to a defined list of users when various activities within SPM have taken place. From this link, notifications can be created, modified, and deleted.

j. **Find users/privileges –** You can search for and display the profile of a user, as well as update and delete the profile from this link.

k. **Brands –** Brands are the major business category of marketable products used within SPM to define the product set for which the service provider is authorized to provide service. From this link, brands can be viewed, added, modified or deleted.

l. **Series/Families/MTs –** From this link, you can view and maintain series, families and machine types (MTs) used in SPM. This structure provide mapping for training entitlement.

m. **Courses –** You can view and maintain courses used within the SPM application from this link.

n. **Certificates –** This link takes you to a list of SPM tracked certifications.

o. **Conditions –** Conditions define and ensure compliance to course and skill prerequisites required by the business partner to become an active Warranty provider and entitled to perform warranty service. Conditions are applied on three levels. 1) Location Activation 2) Service Authorization , 3) Location Authorization. Conditions can be viewed, added, and archived from this link.

p. **Company/Contact types –** This link allows you to view and maintain contact types for each defined company type within SPM. Contact types are classifications for contacts, which are used to define various levels of responsibility within the associated company type. The defined company types within SPM are Authorized Service Partner (SP), Business Partner (BP), Other Service Partner (OSP), and WESS Account (WESS).

q. **Channel types –** Channel types are defined as relationships between a business partner and IBM, identifying the level of entitlement. Channel types can viewed and maintained from this link.

r. **Service types –** Service types identify the relationship between the service provider and IBM, and can be viewed and maintained from this link.

s. **Service program levels –** This link allows you to view and maintain service program levels. The Service program is a multi-tiered program enabling incentives for service providers.

t. **Services –** Services are activities performed by the business partner which fall outside IBM provided brands. A list of these services can be viewed and maintained from this link.

u. **Letters –** This link is used to view and maintain standard letters that can be printed on demand when an SPM activity takes place.

v. **Dealer groups –** Use this link to view and maintain brand authorization levels. (Currently only being used for CPPS in EMEA).

- **Help –** This link allows you to download documentation to assist you in the use of the SPM application.
- **Sign out –** To sign out of the SPM application, click this link. This will return you to the IBM SPM Sign in page.

Note: You may not see all the functions on the Navigation menu displayed here. The functions visible to you once you are logged into SPM are governed by your user privileges.

You can identify your location with the SPM application by looking at the **SPM Navigation Menu.** The active menu item will be displayed in white. Additional sub-functions (if applicable) will be expanded and displayed below the active menu item. On the **Navigation Menu** displayed here, you can see that the user is working within the Search function.

USING THE SPM APPLICATION

4.0 SPM Functions

4.1. Search

The Search hyperlink, found on the SPM Navigation Menu, is used to locate companies, contacts and users within the SPM application.

4.1.1. Find a Company:

Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

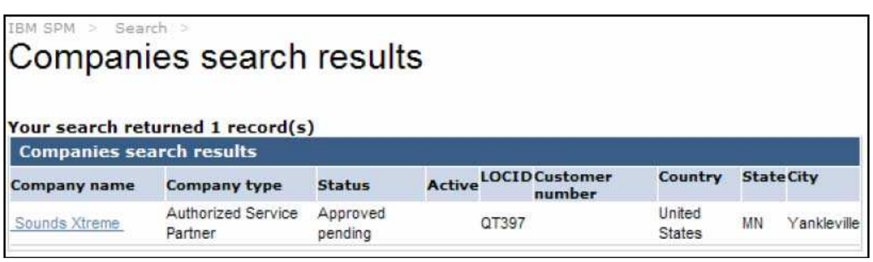
Step 2: Click the **Search** link found on the SPM Navigation Menu.

The **Search** screen, **Find company** tab is displayed.

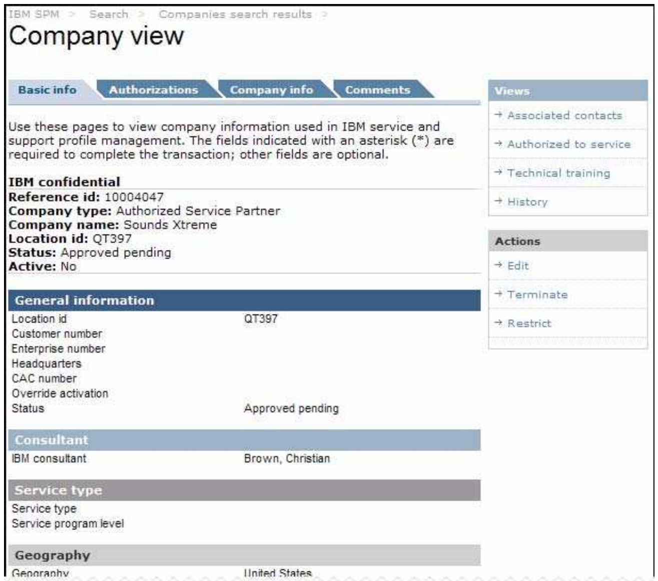
Note: *This is a portion of the page contents.*

Step3: Company name, or Telephone number, in the provided fields. Click 

The **Companies search results** page is displayed.



Step 4: Click on the **Company name** hyperlink to view detailed information. The **Company view** page is displayed.



Note: *This is a portion of the page contents.*

From here, you can perform various tasks, including edit company information, restrict or terminate the company and view associated contacts.

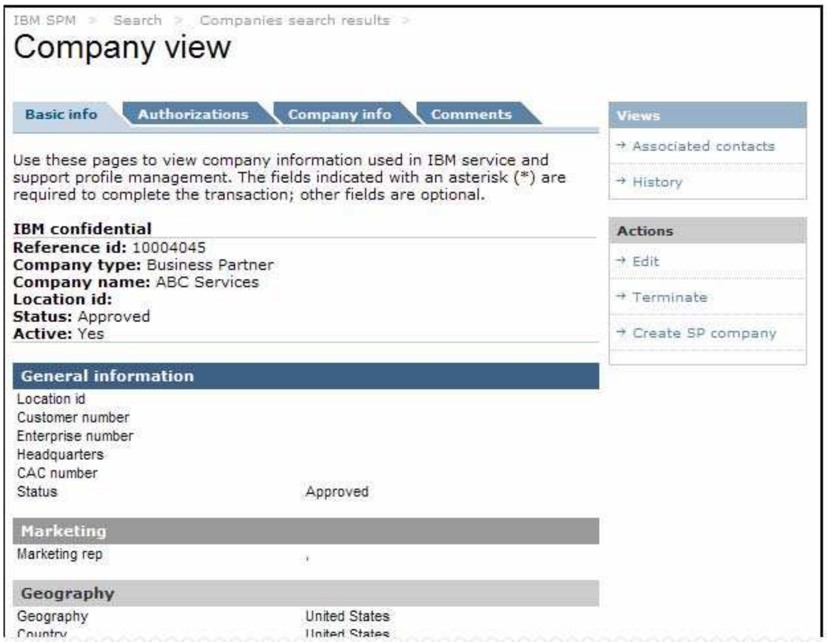
Note: *Your visibility to functions within the Company view will depend on your assigned user privileges.*

4.1.1.1. Business Partner Conversion

When a search has been completed for a BP Company, depending on your user privileges, you may have the option to convert the Business Partner to an SP Company.

Step 5: From the Company view page, click on the Create SP company link located on the right Actions menu.

The **Create company** page is displayed, with the available BP company information populated.



Note: *This is a portion of the page contents.*

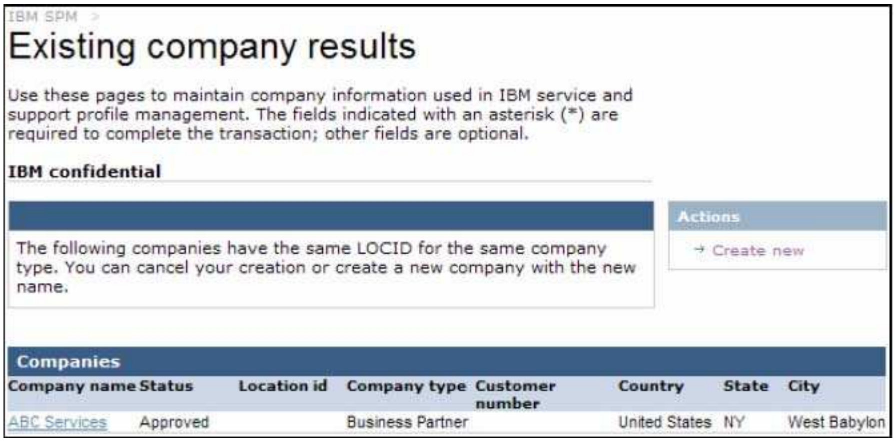
Step 6: Complete all applicable information and enter all required fields for an SP Company.

Note: *See section 4.2.1 Create BP/SP/OSP/WESS Company, beginning with step 5, for more information on SP Company fields.*

Step 7: Click on Update or Submit

Note: *Visibility to* Update *or* Submit *are dependent on your assigned user privileges. Submitted companies are placed in **Pending** status, and require approval by an administrator. See section 4.2.5.1 Company approvals for more information on approving submitted companies. Updated companies are placed in **Approved** status, with no additional action required.*

You may encounter the **Existing company results** page.



Click the **Create new** link from the Actions menu on the right to create the new Service Partner record.

Your company is created, and will be placed in **Approved** or **Pending** status, based on your assigned user privileges. The **IBM SPM** welcome page is displayed.

4.1.2. Find a Contact:

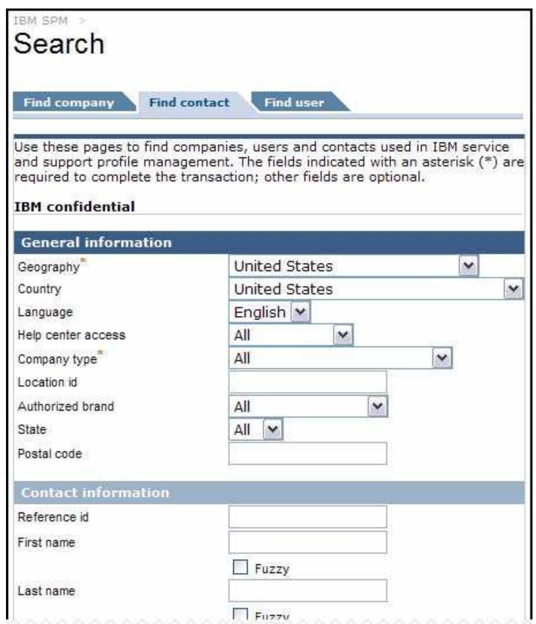
Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

Step 2: Click the **Search** link found on the SPM Navigation Menu.

The **Search** screen, **Find company** tab is displayed.

Note: *This is a portion of the page contents.*

Step 3: Click on the **Find contact** tab.
The **Search** screen, **Find contact** tab is displayed.



Note: *This is a portion of the page contents*

Step 4: From the **Find contact** tab, enter search criteria, such as Company type, Last name, or Email, in the provided fields. Click 

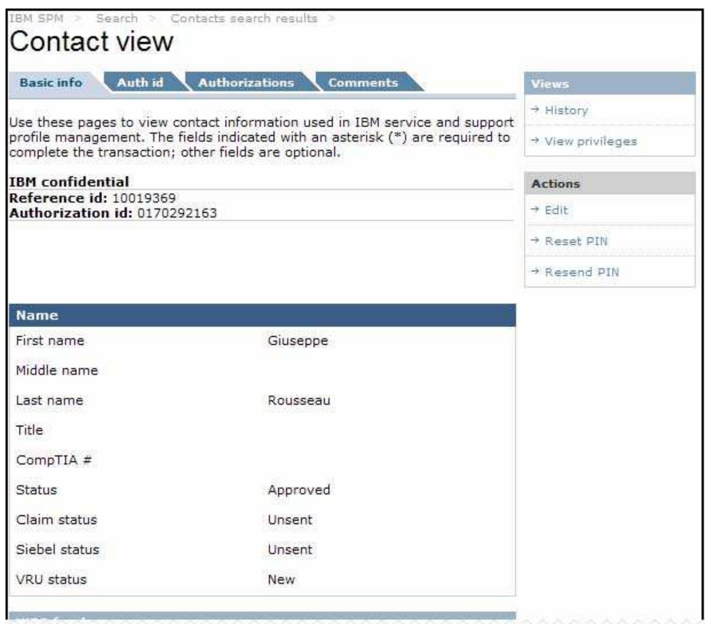
.

The **Contacts search results** page is displayed.

From here, you can choose to archive contact information for both individual or multiple contacts listed.

Note: *Your visibility to archive functions will depend on your assigned user privileges.*

Step 5: Click on the **Last, first, middle** hyperlink to view detailed contact information. The **Contact view** page is displayed.



Note: *This is a portion of the page contents*

From here, you can perform various tasks, including view privileges, edit contact information, and reset or resend pin.

Note: *Your visibility to functions within the contact view will depend on your assigned user privileges*

4.1.3. Find a User:

Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

Step 2: Click the **Search** link found on the SPM Navigation Menu.

The **Search** screen, **Find company** tab is displayed.

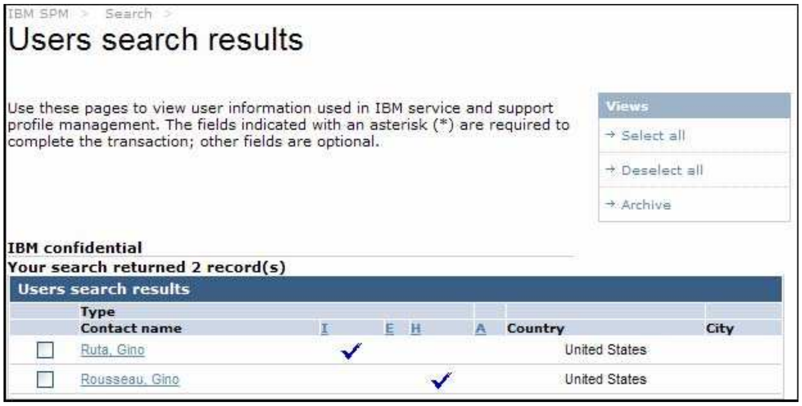
Note: This is a portion of the page contents.

Step 3: Click on the **Find user** tab.

The **Search** screen, **Find user** tab is displayed.

***Note:** This is a portion of the page contents*

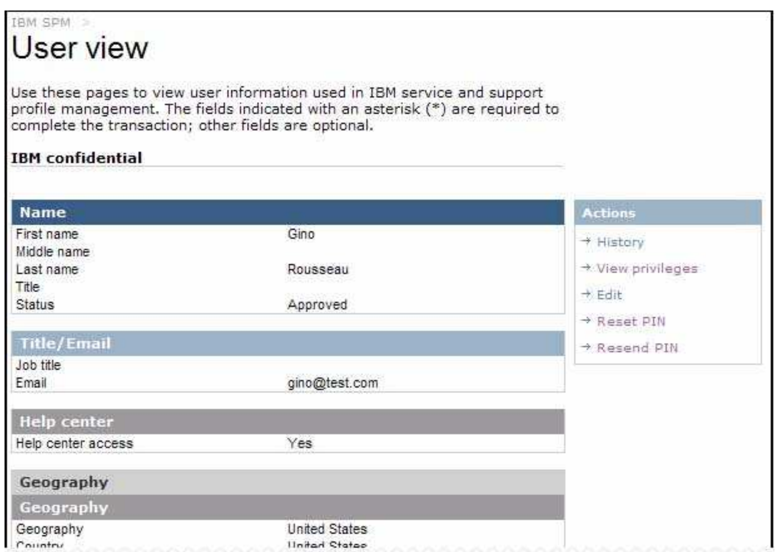
Step 4: From the **Find user** tab, enter search criteria, such as Reference id, First name, or Authorization id, in the provided fields. Click Find user. The **User search results** page is displayed.



From here, you can choose to archive user information for both individual or multiple users listed.

Note: *Your visibility to archive functions will depend on your assigned user privileges.*

Step 5: Click on the **Contact name** hyperlink to view detailed user information. The **User view** page is displayed.



Note: *This is a portion of the page contents*

From here, you can perform various tasks, including view history, view privileges, edit user information, and reset or resend pin.

Note: *Your visibility to functions within the user view will depend on your assigned user privileges*

4.2. Action

4.2.1. Create BP, SP, OSP, or WESS Company

As new relationships are formed between IBM and companies wishing to become IBM's partners, Large Accounts and companies will need to be added to SPM.

SPM manages 4 types of company:

- Business Partners (BP)
- Authorized Service Partners (SP)
- Other Service Partners (OSP)
- Worldwide Enhanced Support Services Accounts (WESS)

Your user privileges within the SPM application will determine if you will have access to this function from the SPM Navigation Menu, as well as what type of company (BP, SP, OSP or WESS) you will be able to create.

Some fields are mandatory when creating a company. Mandatory fields will depend on the company type and the company's geography. All mandatory fields will be noted with a red asterisk (*) for each company type / geography within the SPM application.

A contact can be associated to a company during company creation within SPM, or added at a later time. Contacts should always be associated to one or more companies. Unassociated contacts can be found by running a Brio report.

Based on your user privileges, companies created may require review and approval by an administrator after submission. See section 4.2.5.1 Company Approvals for more information on approving companies.

In this section, you will learn how to add each company type and how to associate contacts to both new and existing companies.

To Create an SPM Company:

Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

Step 2: Click the **Action** link found on the SPM Navigation Menu. The Action sub-categories are listed.

> ***Note:*** *You may not see all Action sub-categories listed. Your visibility to Action sub-categories will depend on your assigned user privileges.*

Step 3: Click **Create BP/SP/OSP/WESS Company** link from the Action sub-category list.

> ***Note:*** *Your visibility to these links will depend on your assigned user privileges.*

> The **Create BP/SP/OSP/WESS Company** page, **Basic Info** tab is displayed (see sample screenshot below).

__Note:__ This is a portion of the page contents.

Step 4: Use the drop down lists in the **Geography** section to select the following:

- **Geography:** Will default to logged in user's geography
- **Country**
- **Language**

Step 5: From the **Basic Info** tab, complete the following sections, as appropriate, for the applicable company type:

(example

Note: *Mandatory fields, by geography, are denoted after the field name using superscript* *EMEA, LA, US*
). They are also marked within the SPM application with a red asterisk (*).

BP Company

General information Section

- Location id AP, CA
- Customer number AP, CA, EMEA
- Enterprise number
- Headquarters
- CAC number CA

Marketing Section

- Marketing rep

Help access Section

- Help center access

SP Company

General information Section

- Location id AP, LA, US
- Customer number AP, EMEA
- Enterprise number
- Headquarters
- CAC number
- Override activation

Consultant Section

- IBM Consultant

Service Type Section

- Service type AP, CA, EMEA, LA, US
- Service program level AP, CA, EMEA, LA, US

Help access Section

- Help center access

OSP Company

General information Section

- Location id AP, LA, US
- Customer number EMEA
- Enterprise number
- Headquarters
- CAC number
- Override activation

Consultant Section

- IBM Consultant

Service type Section

- Service type AP, CA, EMEA, LA, US
- Service program level AP, CA, EMEA, LA, US

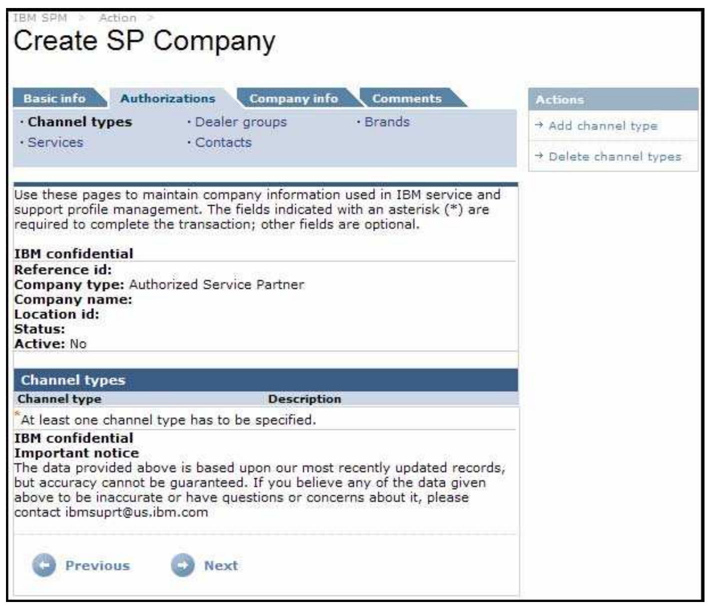
Help access Section
• Help center access

WESS Company

⑩ **General information** Section
. • Customer number
. • Enterprise number
⑩ **Marketing** Section
. • Primary marketing rep
. • Secondary marketing rep
⑩ **Help access** Section
• Help center access
⑩ **Routing (Headquarters use only)** Section
• Case coordinator

Step 6: Click 

The **Create BP/SP/OSP/WESS Company** page, **Authorizations** tab is displayed (see sample screenshot below).

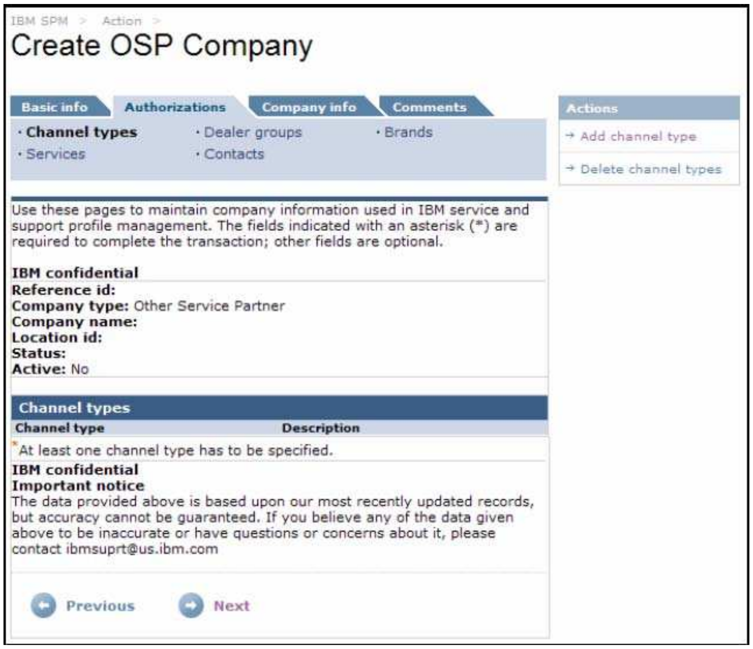


Each section within the Authorizations tab is accessed by clicking on the corresponding link at the top of the Authorizations tab. See sample screenshot below.

Note: *Your visibility to these links will depend on your assigned user privileges*

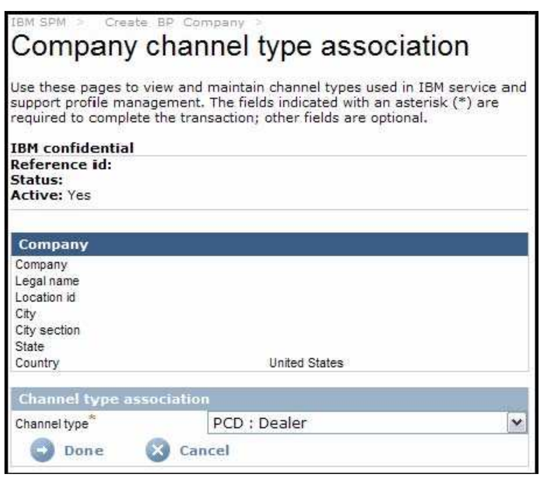
Step 7: From the **Authorizations** tab, click on the **Channel types** link, as appropriate, for the applicable company type.

The **Create BP/SP/OSP/WESS Company** page, **Channel types** link is displayed.



Step 8: From the **Actions** menu on the right, click on the **Add channel type** link.

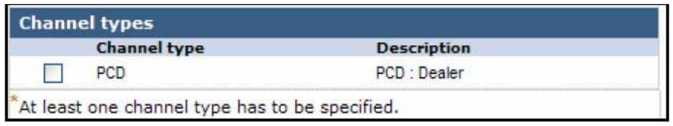
The **Company channel type association** page is displayed.



Paso 9: and click 

.

The selected Channel type will be displayed.

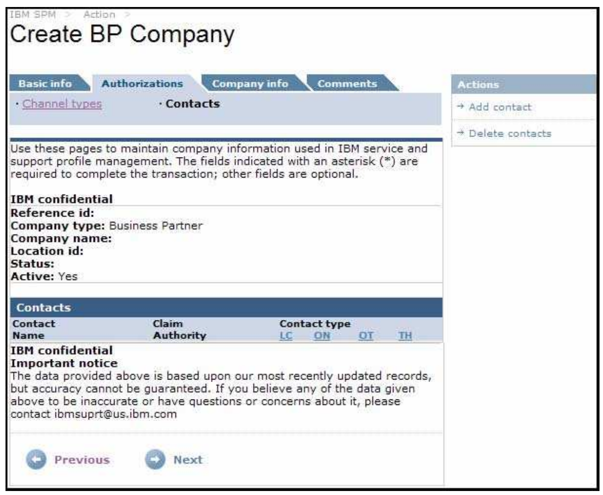


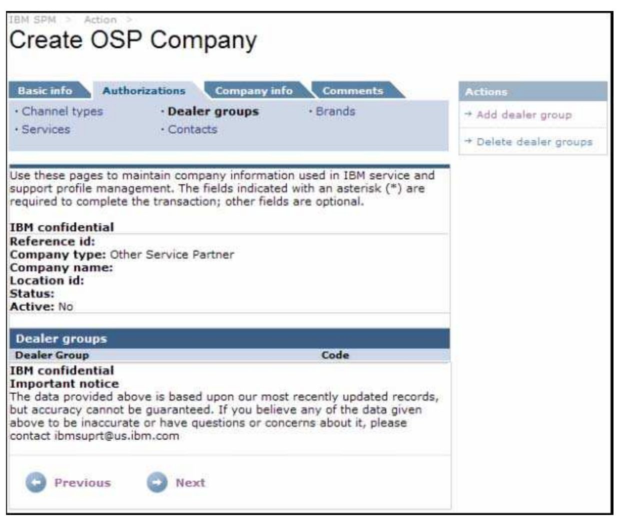
Note: *At least one channel type must be specified.*

Step 10: To add additional channel types, repeat step 9. Otherwise click **Next**

. ❿ For **BP** and **WESS** company types, the **Create BP/WESS Company** page, **Contacts** link displays. Skip to **Step 28**.

. ◴ For **SP** and **OSP** Company types, the **Create SP/OSP Company** page, **Dealer groups** link displays. Continue on to Step 11.





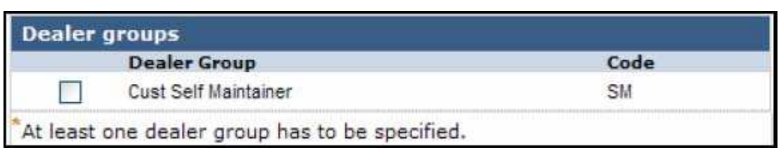
Step 11: From the **Actions** menu on the right, click on the **Add dealer group** link.

Note: *This function is currently only used in EMEA. All other geography users can continue to* ***step 13****.*

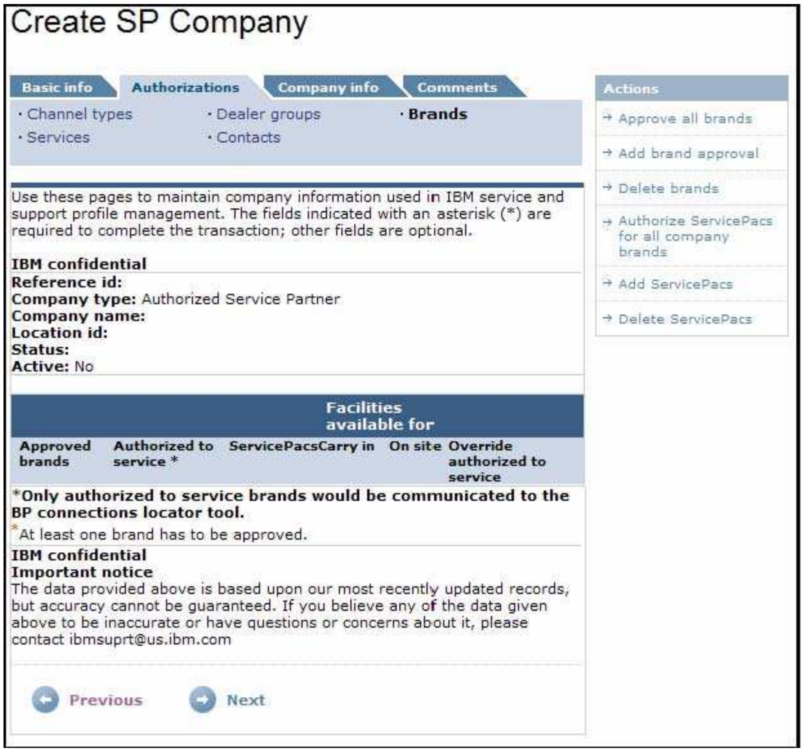
The **Company dealer group association** page is displayed.

Step 12: Select the appropriate Company dealer group association from the **Dealer Group** pick list and click Done.

The selected **Dealer Group** is displayed.



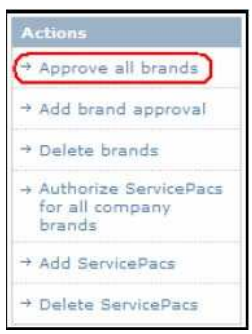
Step 13: To add additional dealer groups, repeat step 12. Otherwise, click Next. The **Create SP/OSP Company** page, **Brands** link is displayed.



From the **Brands** link you can choose to approve all brands, add individual brand approval, delete selected brands, authorize ServicePacs for all company brands, add ServicePacs to a selected brand, or Delete ServicePacs from a selected brand.

Note: *ServicePacs may not be supported for all brands. Therefore you may not be able to add ServicePacs to all brands associated to the company.*

Step 14: To Approve all brands, click the **Approve all brands** link from the **Action** menu on the right.



The **Create SP/OSP Company** page is refreshed, and a list of all approved brands is displayed.

Step 15: To add brand approval for only select brands, click the **Add brand approval** link from the **Action** menu on the right.

The **Company brand edit** page is displayed

Step 16: Select the appropriate Brand association from the **Brand** pick list.

Place a check mark by clicking on the associated box to select **Carry in**, **On site**, **ServicePacs authorization**, or **Service authorization overridden** for the selected brand.

Note: *These options may vary based on the brand selected and your assigned user privileges.*

Step 17: Click .

Step 18: To add additional brands, repeat steps 15 through 17. Otherwise, continue to step 19.

Step 19: To delete a brand, place a check mark next to the corresponding brand name(s) and click on **Delete brands** from the right **Actions** menu.

The **Company brands** delete page is displayed, and the selected brand(s) is listed.

. To cancel the brand deletion, click 

.

select the **Authorize ServicePacs for all company brands** link from the right **Actions** menu.

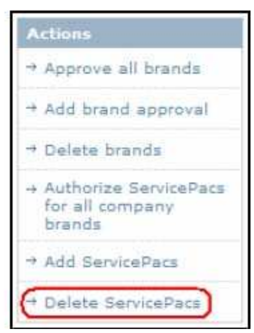
Step 21: To authorize Servicepacs for all brands currently approved for the company, select the **Authorize ServicePacs for all company brands** link from the right **Actions** menu.

The **Create SP/OSP Company** page will refresh and a checkmark will appear in the ServicePacs column for all brands that support ServicePacs.

Step 22: To add ServicePacs for only select brands, place a check mark next to the corresponding brand name(s) and click on **Add ServicePacs** link from the **Action** menu on the right.

The **Create SP/OSP Company** page is refreshed and, if the selected brand supports ServicePacs, a checkmark appears in the ServicePacs column.

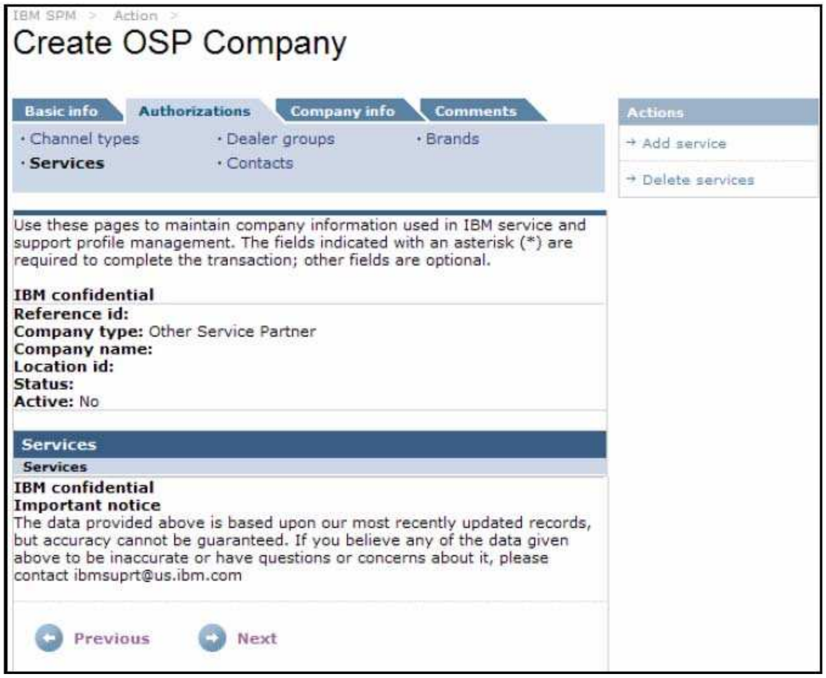
Step 23: To delete a ServicePac, place a check mark next to the corresponding brand name(s) and click on **Delete ServicePacs** from the right **Actions** menu.



The **Create SP/OSP Company** page is refreshed and the checkmark is removed from the ServicePacs column for the selected brand(s).

Step 24: Click Next .

The **Create SP/OSP Company** page, **Services** page displays.

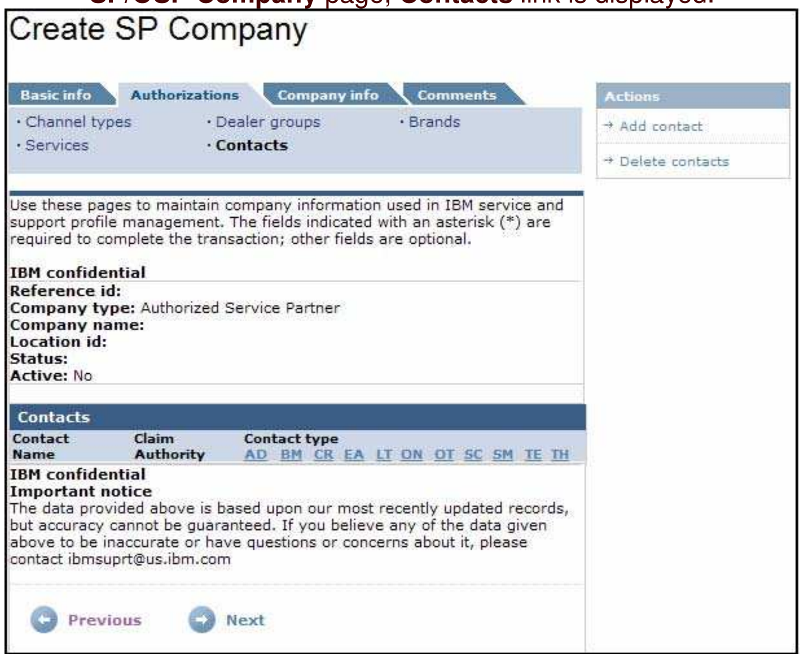


Step 25: From the **Actions** menu on the right, click on the **Add service** link.

The **Company service edit** page is displayed.

The selected **Service** is displayed.

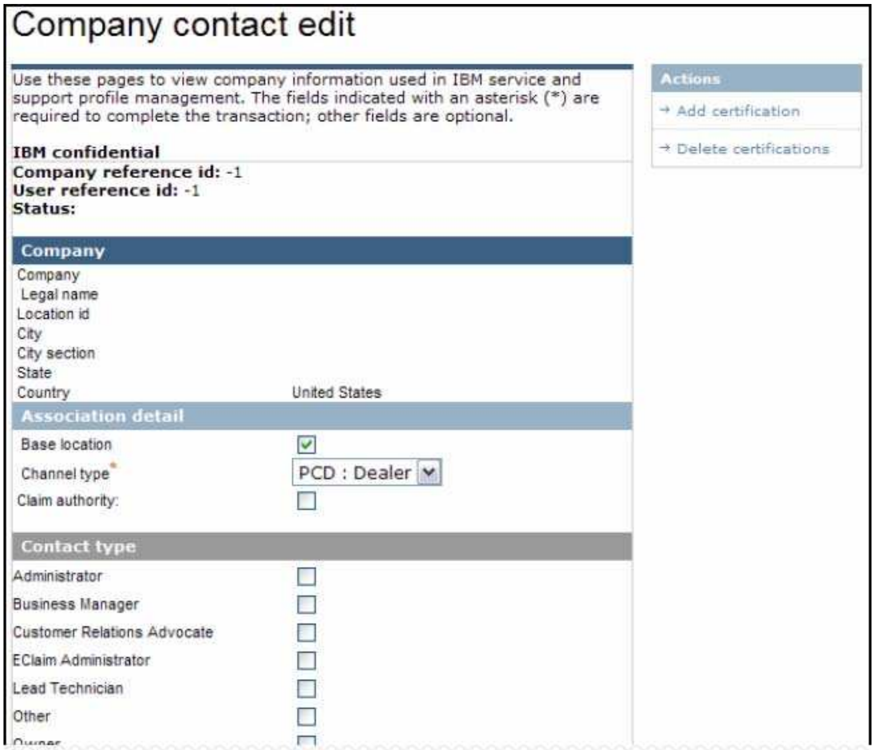
Step 27: To add additional services, repeat step 26. Otherwise, click Next The **Create SP/OSP Company** page, **Contacts** link is displayed.



Step 28: From the **Actions** menu on the right, click on the **Add contact** link.

The **Company contact edit** page is displayed.

Note: *A channel type MUST be added to the company before a contact can be added.*



Note: This is a portion of the page contents.

Step 29: Complete the following sections, as appropriate, for the applicable company type:

Note: *Mandatory fields, by geography, are denoted after the field name using superscript (example: EMEA, LA, US). They are also marked within the SPM application with a red asterisk (*).*

BP Company

Association detail Section

- Base location
- Channel type AP, CA, EMEA, LA, US

Contact Type Section

AP, CA, EMEA, LA, US

- Select at least one of the following:
  - Lead Contact
  - Other
  - Owner
  - Technician

Name Section

- First name AP, CA, EMEA, LA, US
- Middle name
- Last name AP, CA, EMEA, LA, US
- Title
- CompTIA #

WPS feed Section

- Disable feed to claim (checked or unchecked)

Title/Email Section

- Job title
- Email
- Work phone #
- Service manager/Admin email

Help center Section

- Help center access (Yes/No) AP, CA, EMEA, LA, US

Geography Section

- Geography AP, CA, EMEA, LA, US
- Country
- Language AP, CA, EMEA, LA, US

Comments Section

- Comments

SP Company

Association detail Section

- Base location
- Channel type AP, CA, EMEA, LA, US
- Claim authority

Contact Type Section

- Select at least one of the following: AP, CA, EMEA, LA, US
  - Administrator
  - Business Manager
  - Customer Relations Advocate
  - Eclaim Administrator
  - Lead Technician
  - Other
  - Owner
  - Service Contact
  - Service Manager
  - Technician
  - Training Education

Name Section

- First name AP, CA, EMEA, LA, US
- Middle name
- Last name AP, CA, EMEA, LA, US
- Title
- CompTIA #

WPS feed Section

- Disable feed to claim (checked or unchecked) **Title/Email** Section
  - Job title
  - Email
  - Work phone #
  - Service manager/Admin email

Help center Section

- Help center access (Yes/No) AP, CA, EMEA, LA, US

Geography Section

- Geography AP, CA, EMEA, LA, US
- Country

. • Language AP, CA, EMEA, LA, US

Comments Section

• Comments

OSP Company

Association detail Section

. • Base location

. • Channel type AP, CA, EMEA, LA, US

• Claim authority

Contact Type Section

AP, CA, EMEA, LA, US

• Select at least one of the following:

. Administrator
. Customer Relations Advocate
. Eclaim Administrator
. Lead Technician
. Other
. Owner
. Service Contact
. Service Manager
. Technician
Training Education

Name Section

. • First name AP, CA, EMEA, LA, US
. • Middle name
. • Last name AP, CA, EMEA, LA, US
. • Title
. • CompTIA #

WPS feed Section

.• Disable feed to claim (checked or unchecked) **Title/Email** Section

. • Job title
. • Email
. • Work phone #
. • Service manager/Admin email

Help center Section

AP, CA, EMEA, LA, US

.• Help center access (Yes/No)

Geography Section

. • Geography AP, CA, EMEA, LA, US
. • Country
. • Language AP, CA, EMEA, LA, US

Comments Section

• Comments

WESS Company

Association detail Section

. • Base location

. • Channel type AP, CA, EMEA, LA, US

Contact Type Section

• Select at least one of the following: AP, CA, EMEA, LA, US

. Administrator
. Lead Technician
. Other
. Service Contact
. Service Manager
Technician

Name Section

. • First name AP, CA, EMEA, LA, US
. • Middle name
. • Last name AP, CA, EMEA, LA, US
. • Title
. • CompTIA #

WPS feed Section

• Disable feed to claim (checked or unchecked)

Title/Email Section

. • Job title US
. • Email
. • Work phone #
. • Service manager/Admin email

Help center Section

• Help center access (Yes/No) AP, CA, EMEA, LA, US

Geography Section

. • Geography AP, CA, EMEA, LA, US
. • Country
. • Language AP, CA, EMEA, LA, US

Comments Section

• Comments

Step 30: To add certifications to the contact, click on the **Add certification** link from the **Actions** menu on the right.

Note: *Your visibility to the add/delete certifications functions will depend on your assigned user privileges.*

The **Contact certification edit** page is displayed.

Step 31: Complete the following sections, as appropriate, and click Done

Certification Section
- Certification

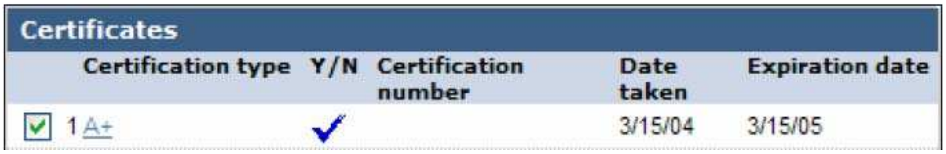
Association detail Section

- Certification number
- Certified
- Date taken: [M/d/yy]
- Expiration date: [M/d/yy]

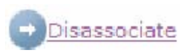
The **Company contact edit** screen is refreshed, and the added certificate is displayed.

Step 32: To add additional certifications, repeat step 31. Otherwise continue to step 36.

Step 33: To delete certifications, place a check mark next to the corresponding certification type(s) and click on **Delete certifications** from the right **Actions** menu.



The **Contact certification association** page is displayed.



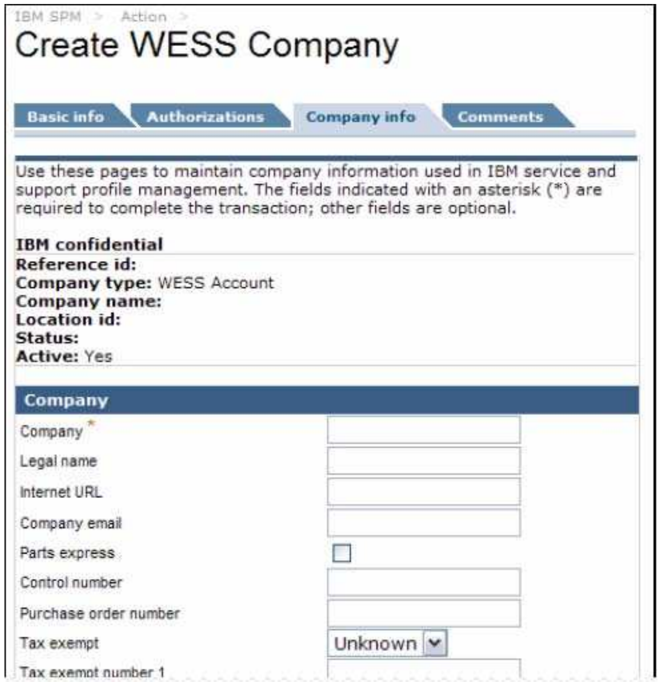
. To cancel the certification deletion, click 

.

The **Company contact edit** page is refreshed, and the certification updates are reflected.

The **Create BP/SP/OSP/WESS Company** page, **Authorizations** tab, **Contacts** link is redisplayed.

The **Create BP/SP/OSP/WESS Company** page, **Company info** tab is displayed.



IBM SPM > Action >

Create WESS Company

Basic info	Authorizations	Company info	Comments

Use these pages to maintain company information used in IBM service and support profile management. The fields indicated with an asterisk (*) are required to complete the transaction; other fields are optional.

IBM confidential
Reference id:
Company type: WESS Account
Company name:
Location id:
Status:
Active: Yes

Company

Company *	
Legal name	
Internet URL	
Company email	
Parts express	☐
Control number	
Purchase order number	
Tax exempt	Unknown
Tax exempt number 1	

Note: *This is a portion of the page contents.*

Step 37: Complete the following sections, as appropriate.

> ***Note:*** *Mandatory fields, by geography and company type, are denoted after the field name using superscript (example: EMEA, LA, US). They are also marked within the SPM application with a red asterisk (*).*

Company Section

- Company *AP, CA, EMEA, LA, US*
- Legal name
- Internet URL
- Company email
- Parts express
- Control number
- Purchase order number
- Tax exempt
- Tax exempt number 1
- Tax exempt number 2
- Decoupled parts

Address Section

- Address 1 *AP, CA, EMEA, LA, US*
- Address 2
- Address 3
- City *AP, CA, EMEA, LA, US*
- City section
- State *AP, CA, EMEA, LA, US*
- Country
- Postal code
  - For SP/OSP company types *CA,LA, US*
  - For WESS company types *AP, CA, US*
- Phone #

- For BP company type *AP*
- For SP/OSP/WESS company types *AP, CA, EMEA, LA, US*

▪ Fax #

Alternate address Section

- Address 1
- Address 2
- Address 3
- City
- City section
- State
- Country
- Postal code
- Phone #
- Fax #

Step 38: Click 

.

The **Create BP/SP/OSP/WESS Company** page, **Comments** tab is displayed.

Step 39: Enter comments and instructions, as appropriate.

Step 40: To save the company without submitting it, click 

This will save the entered company information in draft format. You can later access and update the company information using the **Search** feature, located on the SPM Navigation Menu. See section 4.1 Search for additional information on using this feature.

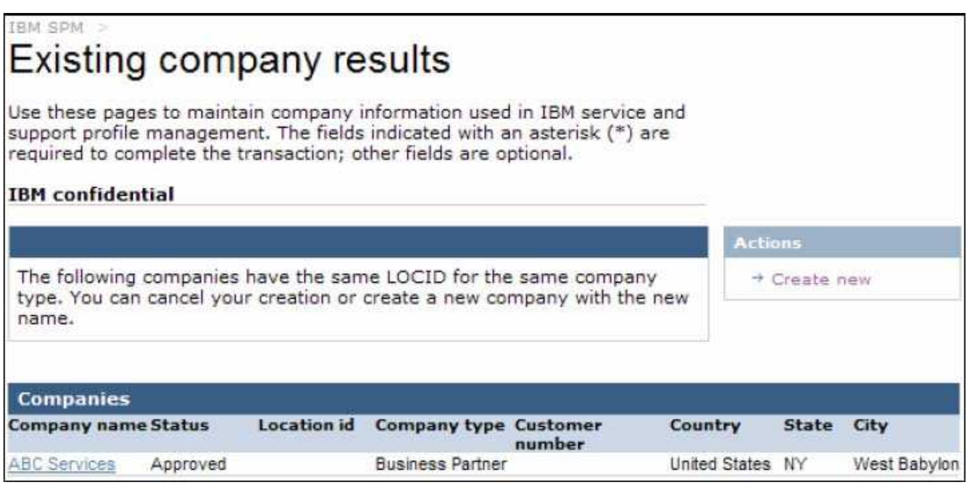
Step 41: To cancel company creation, click Cancel

Note: *All entered data will be lost.*

Step 42: To complete company creation, click on Update or Submit or .

Note: Visibility to Update *or* Submit or are dependent on your assigned user privileges. Submitted companies are placed in **Pending** status, and require approval by an administrator. See section4.2.5.1 Company Approvals for more information on approving submitted companies. Updated companies are placed in Approved status, with no additional action required.

You may encounter the **Existing company results** page if a possible match to the company you are attempting to add is detected.



Click the **Company name** link to view details of the existing company.

If you determine that the company you are creating is a duplicate of the existing company, click 

. All of the company information you have entered will be lost. To continue creation of the company using the data you have entered, click the **Create new** link from the Actions menu on the right.

Your company is created, and will be placed in **Approved** or **Pending** status, based on your assigned user privileges. The **IBM SPM** welcome page is displayed.

4.2.2. Create SP Application

When an IBM Internal Representative receives a request from a company wanting to become an IBM partner, the representative sends an online form to the requester using the **Create SP application** function within SPM. An email is sent from SPM to the address supplied in the application form, which contains a link to SPM and an Authorization ID and PIN. The recipient clicks the link in the email, completes IBM registration, and logs into SPM using the supplied Authorization ID and PIN. An internal user with Approve Application privileges is notified that an application has been submitted. The user approves the request, if appropriate and sends a Welcome letter to the partner.

Notes:

- *This function is currently only being used in Canada and LA.*
- *In EMEA today, a country specific application form is sent to the requestor from the CWO using a source outside of SPM. Once the completed application is returned, the CWO enters the new company information manually into SPM. See section 4.2.1 Create BP, SP, OSP or WESS Company for more information on creating an SP company in SPM. However, use of the Create SP application function will soon be implemented in EMEA. CWOs will receive a communication from their BP Channel owner when it is ok for you to begin using this function.*
- *This function is currently not being used in AP and the US.*

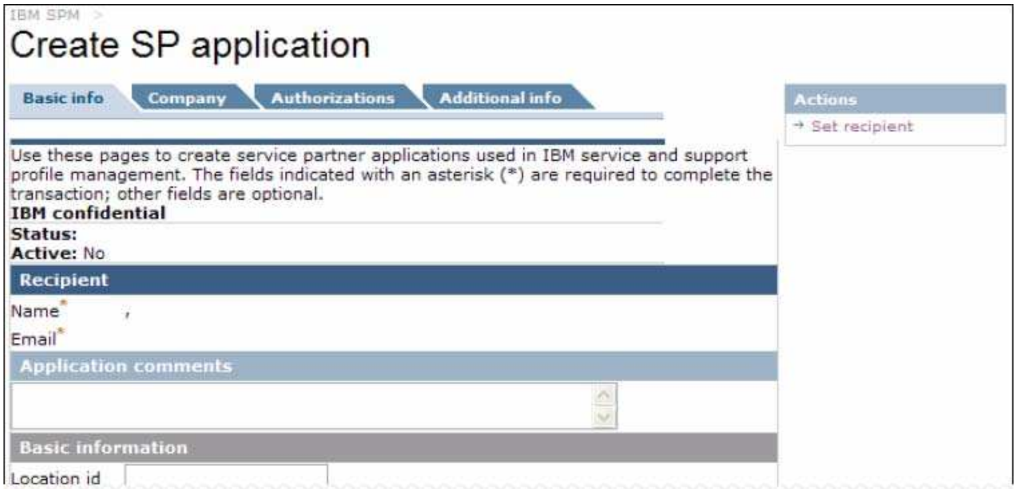
To Create an SPM Application:

Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

Step 2: Click the **Action** link found on the SPM Navigation Menu. The Action subcategories are listed

Step 3: Click **Create SP Application.**

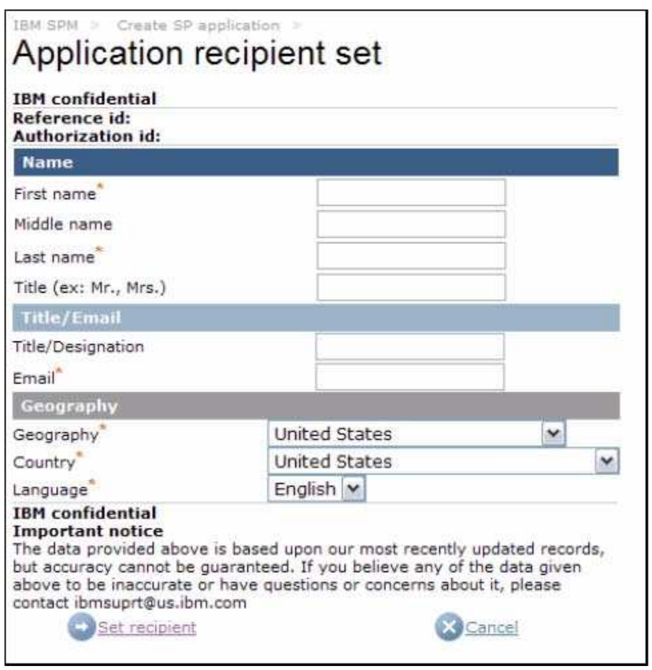
The **Create Service Partner Application** page is displayed:



Note: *This is a portion of the page contents.*

Step 4: From the **Actions** menu on the right, click **Set recipient** to enter information for the person who is to receive the application.

The **Application recipient set** page is displayed.



Step 5: Complete the following sections, as appropriate.

Note: *Required fields are noted with a red asterisk (*).*

Name Section

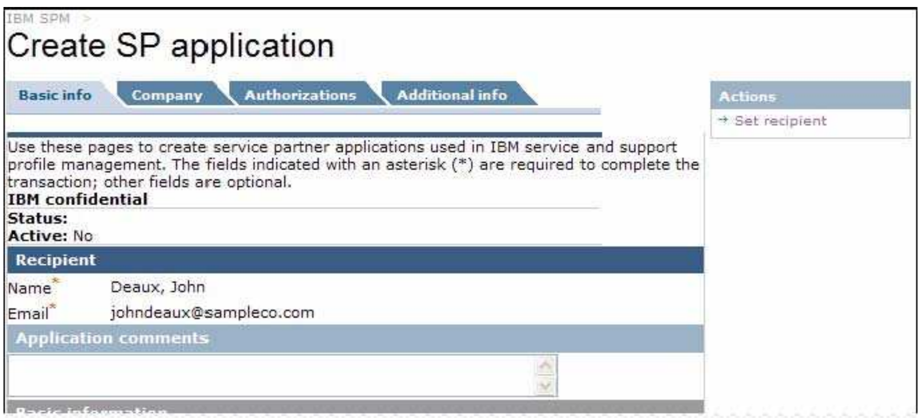
- First name *

• Middle name
• Last name *
• Title

Title/Email Section
• Title/Designation
• Email *

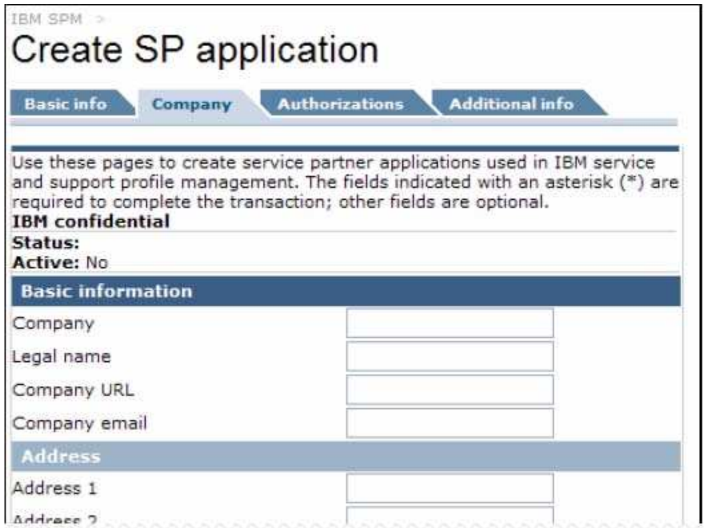
Geography Section
• Geography *
• Country *
• Language *

Step 6: Click Set recipient
The **Create SP application** page redisplays, and the Recipient section is populated.



Note: *This is a portion of the page contents.*

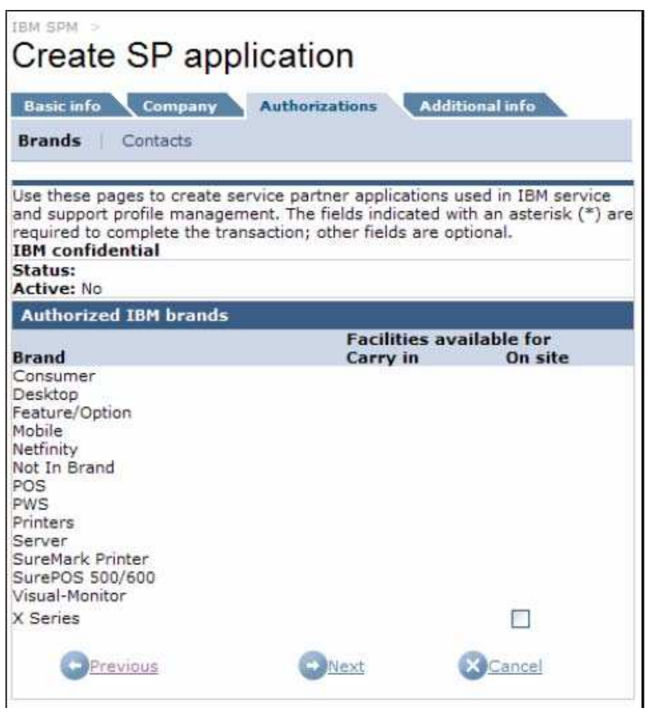
Step 7: Click Next. The **Create SP application** page, **Company** tab is displayed.



Note: *This is a portion of the page contents.*

Complete the **Basic information**, **Address**, and **Alternate address sections**, as appropriate.

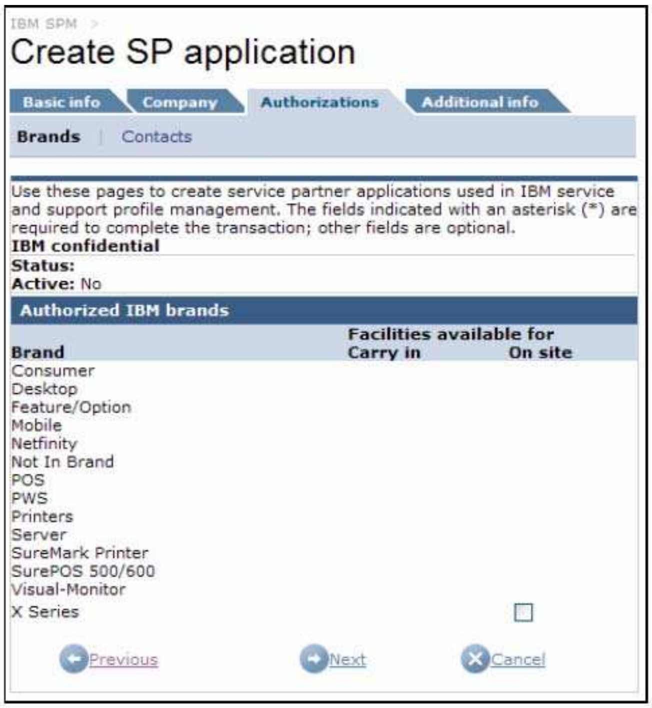
Step 8: Click Next. The **Create SP application** page, **Authorizations** tab is displayed.



Each section within the Authorizations tab is accessed by clicking on the corresponding link at the top of the Authorizations tab. See sample screenshot below.

Step 9: From the **Authorizations** tab, click on the **Brands** link, as appropriate.

The **Create SP application** page, **Brands** link is displayed. (See sample screenshot for United States application below.)



Step 10: Place a check mark in the corresponding Carry in or Onsite box to add a request to be authorized to service these brands and service types to the application, as appropriate.

Note: *A selection box will only be displayed if the brand supports Carry in and/or On site service*

Step 11: Click Next. The **Create SP application** page, **Authorizations** tab, **Contacts** link is displayed.

Step 12: From the **Actions** menu on the right, click on the **Add contact** link, as appropriate.

The **Application company contact edit** page is displayed.

Note: *This is a portion of the page contents.*

Step 13: Complete the following sections, as appropriate, for your geography.
Note: *This is a portion of the page contents.*

Note: *Required fields are noted in with a red asterisk (*).*

Association detail Section

- Base location
- Claim authority

Contact Type Section

Select at least one of the following: *

- Administrator
- Customer Relations Advocate
- Eclaim Administrator
- Lead Technician
- Other
- Owner
- Service Contact
- Service Manager
- Technician
- Training Education

Name Section

- First name *
- Middle name
- Last name *
- Title
- CompTIA #

Title/Email Section

- Job title
- Email
- Work phone #
- Service manager/Admin email

Geography Section

- Geography *
- Country *
- Language *

Comments Section

- Comments

Step 13: To add certifications to the contact, click on the **Add certification** link from the **Actions** menu on the right.

The **Contact certification edit** page is displayed.

Step 14: Complete the following sections, as appropriate, and click Done

Note: *Required fields are noted in with a red asterisk (*).*

Certification Section

- Certification

Association detail Section

- Certification number *
- Certified
- Date taken: [M/d/yy]
- Expiration date: [M/d/yy]

The **Application company contact edit** screen is refreshed, and the added certificate is displayed.

	Certification type	Y/N	Certification number	Date taken	Expiration date
☐	A+	✓	1234567890	3/15/04	

Step 15: To add additional certifications, repeat steps 13 and 14. Otherwise continue to step 16.

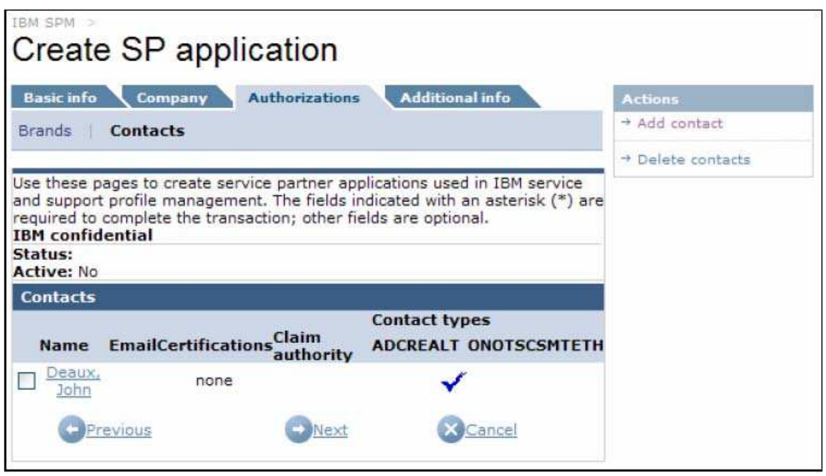
Step 16: To delete certifications, place a check mark next to the corresponding certification type(s) and click on **Delete certifications** from the right **Actions** menu.

	Certification type	Y/N	Certification number	Date taken	Expiration date
☑	A+	✓	1234567890	3/15/04	

The **Contact certification association** page is displayed.

Step 16: To confirm the certification deletion, clic Delete . To cancel the certification deletion, click Cancel . The **Application company contact edit** page is refreshed, and the certification updates are reflected.

Step 17: Clic Done
The **Create SP Application** page is redisplayed, and the contact information is presented.



Step 18: Click Next .

The **Create SP application** page, **Additional info** tab is displayed.

Each section within the Additional info tab is accessed by clicking on the corresponding link at the top of the Additional info tab. See sample screenshot below.

Step 19: From the **Additional info** tab, click on the **Other training** link, as appropriate.

The **Create SP application** page, **Additional info** tab, **Other training info** link is displayed.

Complete the **Other training info** and **Staff distribution** sections, as appropriate.

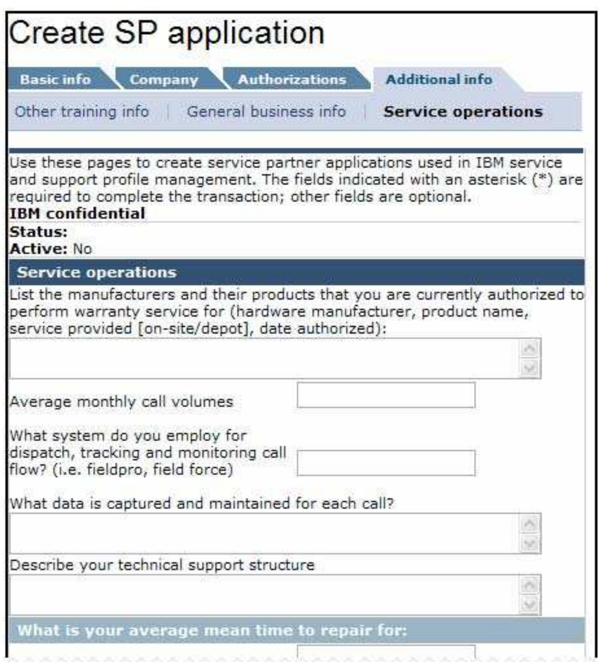
Step 20: Click .

The **Create SP application** page, **Additiona**
link is displayed.

Complete the **General business information section,** as appropriate.
The **Create SP application** page, **Additional info** tab, **Service operations** link is displayed.

Step 21: Click .

The **Create SP application** page, **Additional info** tab
displayed.



Note: *This is a portion of the page contents.*

Complete the **Service operations** section, and answer questions in the **What is your average mean time to repair for:** section, as appropriate.

Step 22: Click 

An email is sent to the recipient providing them with a link to the SPM web site, their authorization ID and PIN, and instructions for accessing the SPM site to complete the application.

Once the recipient has completed and submitted the application, it must be approved by an SPM administrator. See section 4.2.5.3 Application Approvals for more information on this process.

4.2.3. Create Contact

Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

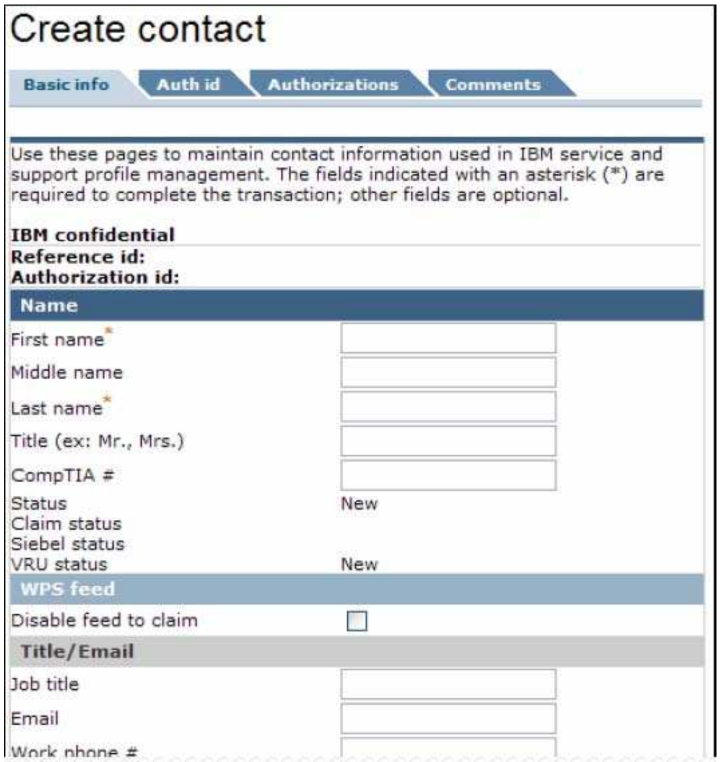
Step 2: Click the **Action** link found on the SPM Navigation Menu. The Action sub-categories are listed.

Note: *You may not see all Action sub-categories listed. Your visibility to Action sub-categories will depend on your assigned user privileges.*

Step 3: Click **Create contact** link from the Action sub-category list.

Note: *Your visibility to this link will depend on your assigned user privileges.*

The **Create contact** page, **Basic info** tab is displayed.



Note: *This is a portion of the page contents.*

Step 4: Complete the following sections, as appropriate.

Note: *Mandatory fields are marked with a red asterisk (*).*

Name Section

- First name *
- Middle name
- Last name *
- Title
- CompTIA #

WPS feed Section

- Disable feed to claim

Title/Email Section

- Job title
- Email
- Work phone #
- Service manager/Admin email

Help center Section

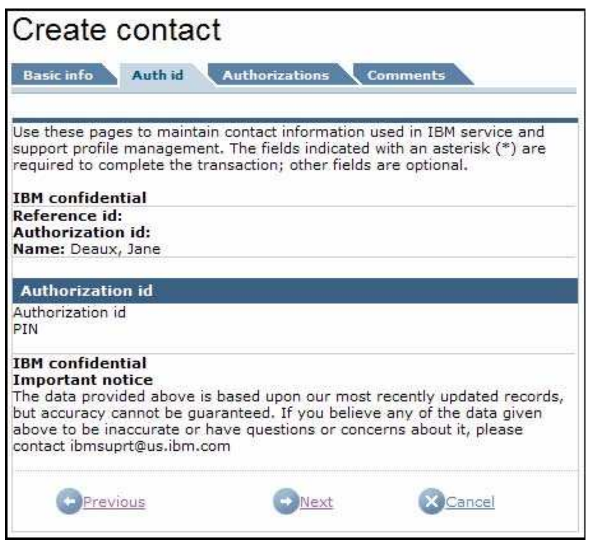
- Help center access (Yes/No) *

Geography Section

- Geography *
- Country
- Language *

Step 5: Click Next

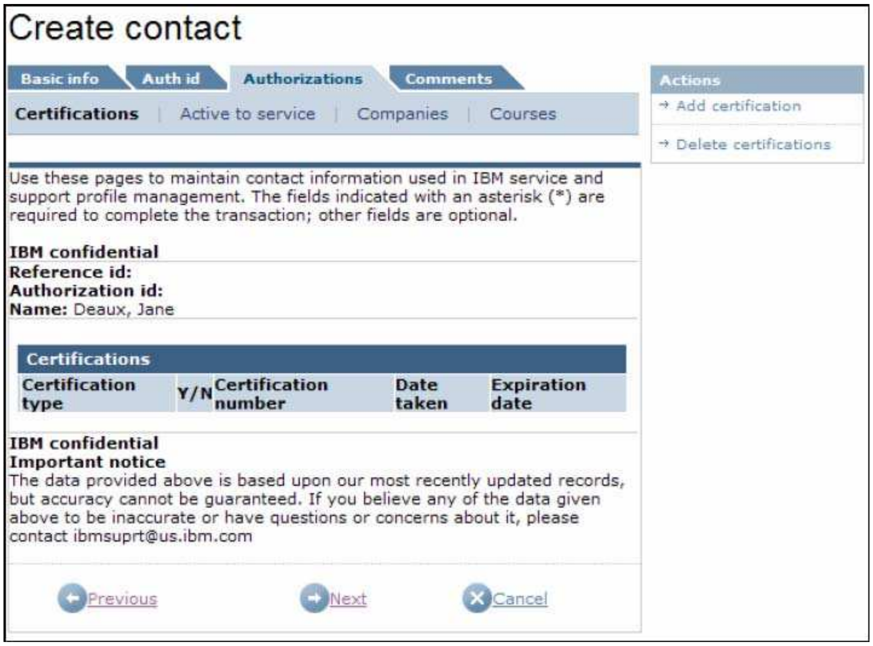
The **Create contact** page**, Auth id** tab is displayed.



Note: *An Authorization id will not be created until the contact creation is complete.*

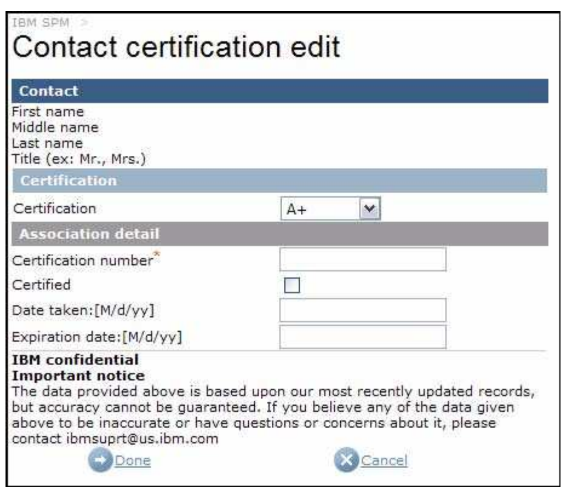
Step 6: Click Next

The **Create contact** page**, Authorizations** tab, **Certifications** link is displayed.



Step 7: To add certifications to the contact, click on the **Add certification** link from the **Actions** menu on the right. Otherwise, skip to step 12.

The **Contact certification edit** page is displayed.



Step 8: Complete the following sections, as appropriate, and click Done

Note: *Required fields are noted in with a red asterisk (*).*

Certification Section

- Certification

Association detail Section

- Certification number
- Certified
- Date taken: [M/d/yy]
- Expiration date: [M/d/yy]

The **Create contact** screen is refreshed, and the added certificate is displayed.

	Certification type	Y/N	Certification number	Date taken	Expiration date
☐	A+	✓	1234567890	3/15/04	

Step 9: To add additional certifications, repeat steps 7 and 8. Otherwise continue to step 10.

Step 10: To delete certifications, place a check mark next to the corresponding certification type(s) and click on **Delete certifications** from the right **Actions** menu.

	Certification type	Y/N	Certification number	Date taken	Expiration date
☑	A+	✓	1234567890	3/15/04	

The **Contact certification association** page is displayed.

Contact certification association

IBM confidential

Name	Number	Certified	Date taken	Expiration date
A+		✓	3/15/04	3/15/05

IBM confidential
Important notice
The data provided above is based upon our most recently updated records, but accuracy cannot be guaranteed. If you believe any of the data given above to be inaccurate or have questions or concerns about it, please contact ibmsuprt@us.ibm.com

Disassociate   Cancel

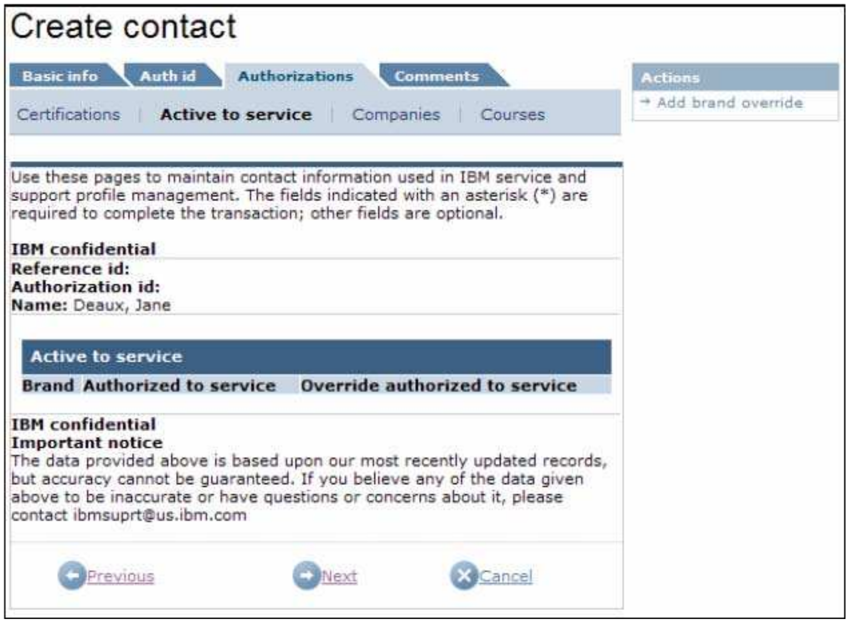
Step11: To confirm Disassociate . To cancel the certification deletion, click Cancel.

The **Create contact** page is refreshed, and the certification updates are reflected.

The **Create contact** page**, Authorizations** tab, **Active to service** link is displayed.

Step 12: Click Next .

The **Create contact** page, **Authorizations** tab, **Active to service** link i displayed.

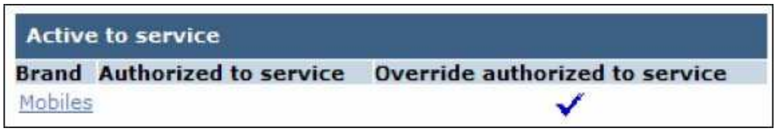


Step 13: To add a brand override to the contact, click on the **Add brand override** link from the **Actions** menu on the right. Otherwise, skip to step 15.

The **Contact brand association** page is displayed.

Step 14: Select the appropriate brand from the **Brand** picklist. Click Done

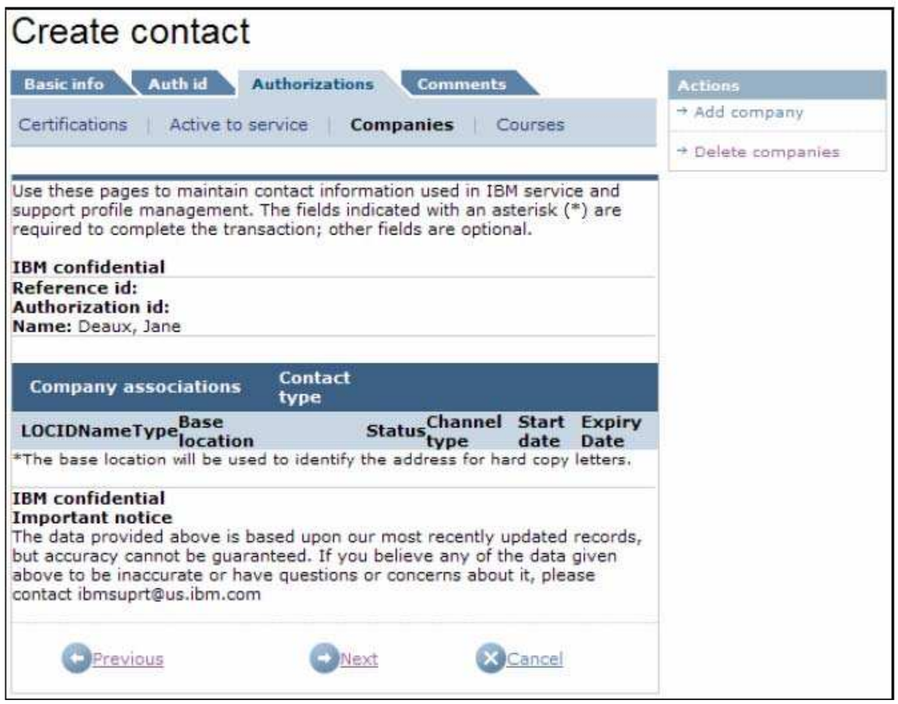
The **Create contact** page**, Authorizations** tab, **Active to service** link is refreshed, and the Active to service section is updated with the brand override information.



The **Create contact** page**, Authorizations** tab, **Companies** link is displayed.

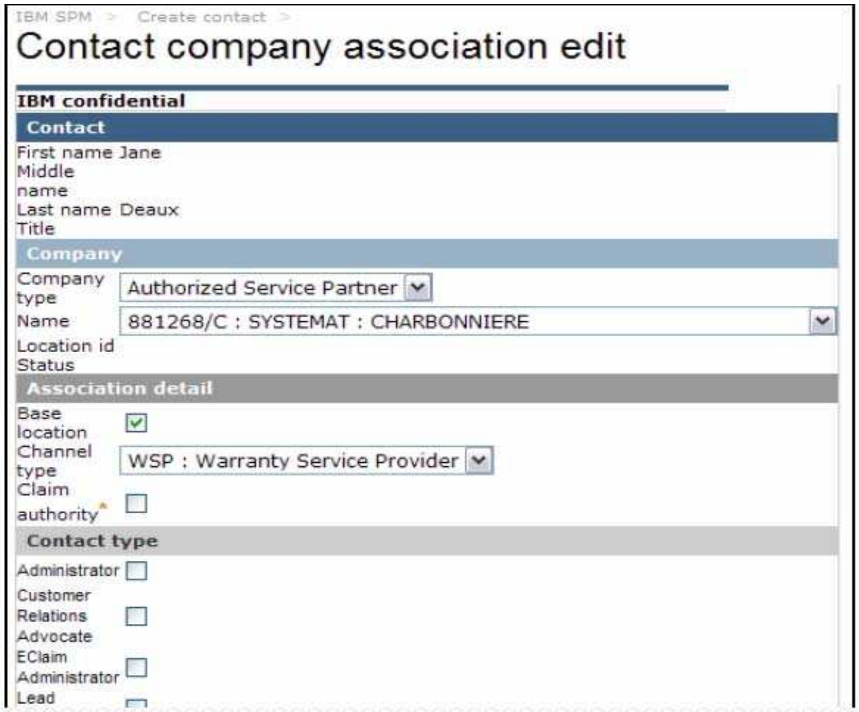
Step 15: Click Next.

The **Create contact** page**, Authorizations** tab, **Companies** link is displayed.



Step 16: To associate the contact to a company, click on the **Add company** link from the **Actions** menu on the right. Otherwise skip to step 22.

The **Contact company association** edit page is displayed.



Note: *This is a portion of the page contents.*

Step 17: From the **Company** section, select the appropriate company type from the **Company** drop down pick list.

Note: *This is a portion of the page contents.*

The screen will refresh, and the Name drop down pick list will be populated with companies associated to the company type selected. **Step 18:** From the **Name** drop down pick list, select the existing company you wish to associate the new contact to. Click Done.

Step 19: Complete the following fields, as appropriate, in the Association detail section.

- Base location
- Channel type
- Claim authority

Step 20: Complete the **Contact type** section, as appropriate, for the company type selected in step 17

Note: *At least one contact type must be selected.*

SP/OSP Company

- Administrator
- Customer Relations Advocate
- Eclaim Administrator
- Lead Technician
- Other
- Owner
- Service Contact
- Service Manager
- Technician
- Training Education

BP Company

- Lead Contact
- Other
- Owner

WESS Company

- Administrator
- Lead Technician
- Other
- Service Contact
- Service Manager
- Technician

Step 21: Click Done

The **Create contact** page**, Authorizations** tab, **Companies** link is refreshed, and the added company association is displayed.

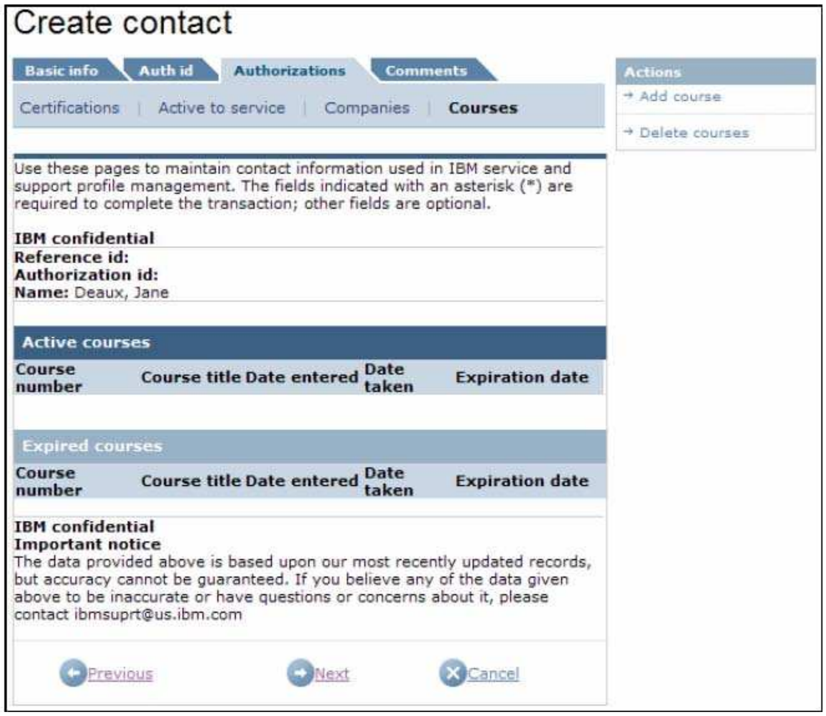
Company associations				Contact type										
LOCID	Name	Type	Base location	ADCR	EAL	TO	NOT	SCS	MT	ETH	Status	Channel type	Start date	Expiry Date
FR02501		SP	✓	✓								WSP	2/26/05	

*The base location will be used to identify the address for hard copy letters.

Step 22: Click Next

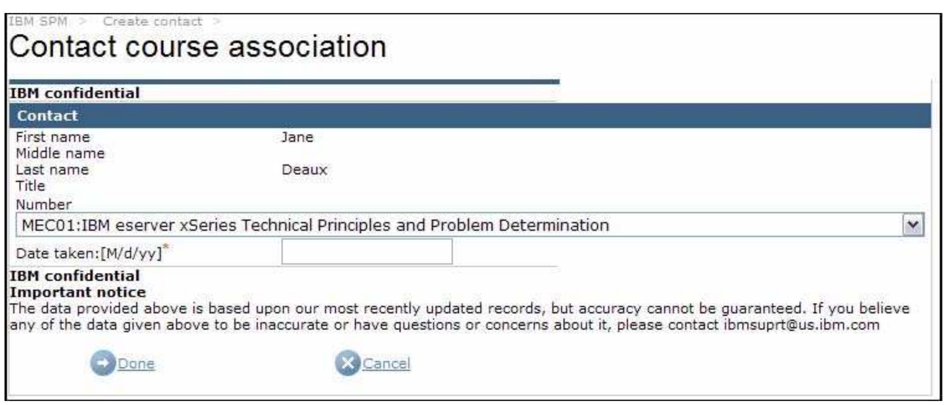
Step 22: Click Next .

The **Create contact** page, **Authorizations** tab, **Courses** link is displayed



Step 23: To add a course to the contact, click on the **Add course** link from the **Actions** menu on the right. Otherwise skip to step 26.

The **Contact course association** page is displayed.



Select the applicable course from the **Number** drop down pick list. Enter the date the course was taken in the **Date taken** field.

Step 24: Click Done

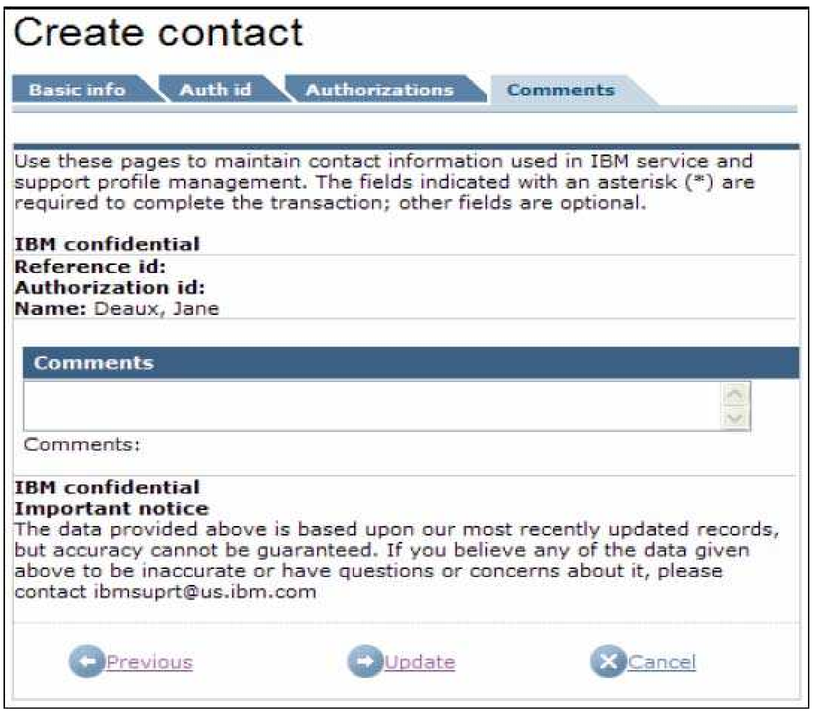
The **Create contact** page**, Authorizations** tab, **Courses** link is refreshed, and the added course information is displayed.

Active courses				
Course number	Course title	Date entered	Date taken	Expiration date
MXW01	PC Basics	2/26/05	6/2/01	

Step 25: To add additional courses, repeat steps 23 and 24. Otherwise continue to step **26.**

Step 26: Click Next .

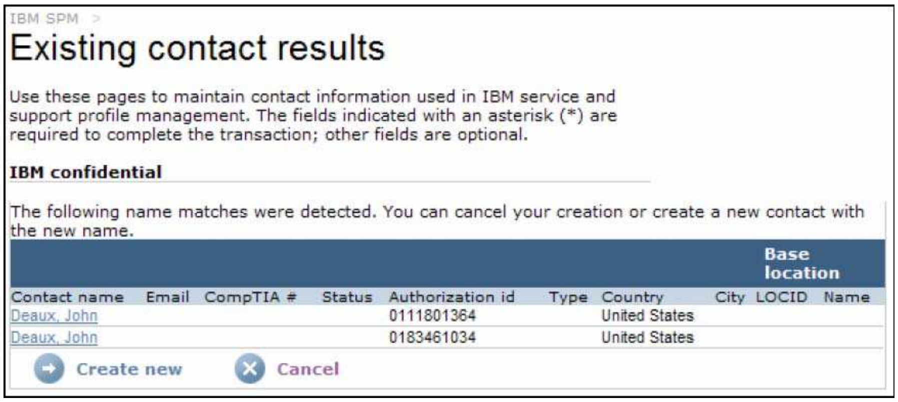
The **Create contact** page**, Comments** tab is displayed.



Enter any comments, as appropriate, in the **Comments** section.

Step 27: To complete contact creation, click on Update

You may encounter the **Existing contact results** page if a possible match to the contact you are attempting to add is detected.

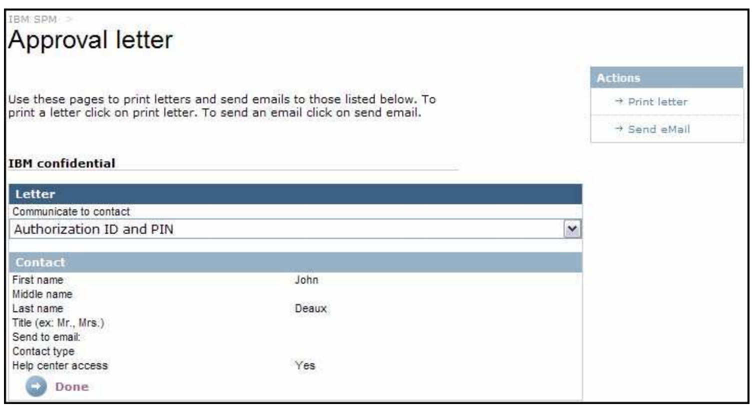


Click the **Contact name** link to view details of the existing company.

If you determine that the contact you are creating is a duplicate of the existing contact, click Cancel. All of the contact information you have entered will be lost.

To continue creation of the contact using the data you have entered, click Create new

The **Approval Letter** page is displayed.



Step 28: From the **Communicate to contact** pick list, select the appropriate letter for the new contact.

Step 29: To print the selected letter, click on the **Print letter** link on the **Actions** menu on the right. Otherwise skip to step 30.

A new browser window will open, and the selected letter will be displayed.

To print the letter, click Print this page . Close the browser window.

Step 30: To email the selected letter, click on the **Send eMail** link on the **Actions** menu on the right. Otherwise, skip to step 31.

Note: *An email address must have been entered during contact creation in order for an email to be sent.*

The **Approval letter email send confirm** page is displayed.

Click Done . The **Approval letter** page is redisplayed.

Step 31: Click Done. Your contact is created, and will be placed in **Approved** or **Pending** status, based on your assigned user privileges. The **IBM SPM** welcome page is displayed.

4.2.4. Create Helppack

Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

Step 2: Click the **Action** link found on the SPM Navigation Menu. The Action subcategories are listed.

Note: *You may not see all Action sub-categories listed. Your visibility to Action subcategories will depend on your assigned user privileges.*

Step 3: Click the **Create helppack** link from the Action sub-category list.

Note: *Your visibility to this link will depend on your assigned user privileges.*

The **Helppack user create** page is displayed.

Note: *This is a portion of the page contents.*

Step 4: Complete the following sections, as appropriate, and click Done

Note: *Required fields are noted in with a red asterisk (*).*

Name Section

- First name *
- Middle name
- Last name *
- Title

Title/Email Section

- Job title
- Email *

Geography Section

- Geography *
- Country *
- Language *

Personal address Section

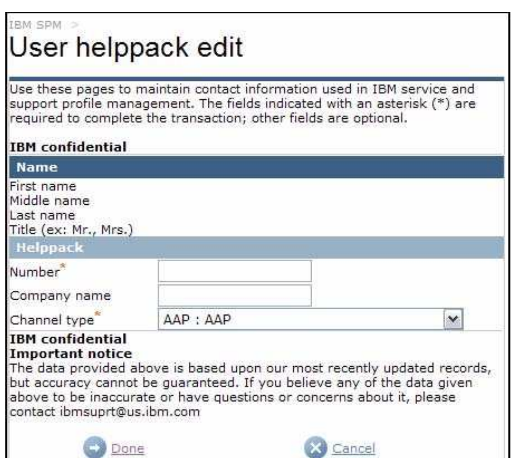
- Address 1 *
- Address 2
- Address 3
- City *
- City section
- State *
- Postal code *
- Personal phone #
- Fax #
- Work phone #
- Mobile phone #

Comments Section

- Comments

Step 5: To add a helppack, click on the **Add helppack** link from the **Actions** menu on the right.

The **User helppack edit** page is displayed.



Step 6: Complete the following fields, as appropriate, and click Done

Note: *Required fields are noted in with a red asterisk (*).*

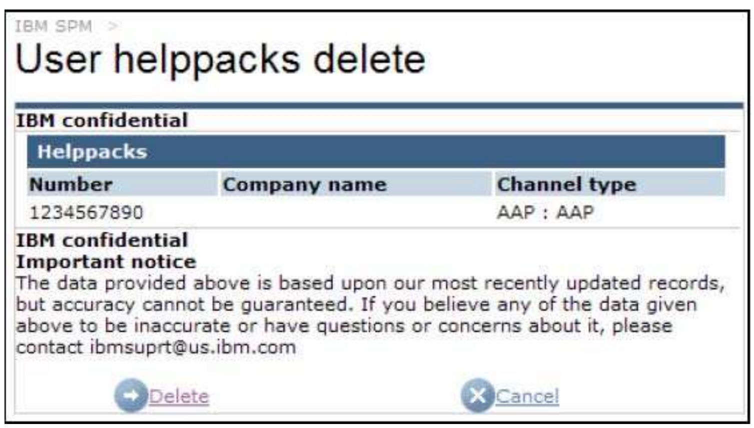
- Number *
- Company name
- Channel type *

The **Helppack user create** screen is refreshed, and the added helppack is displayed.

Step 7: To add additional helppacks, repeat steps 5 and 6. Otherwise continue to step 8

Step 8: To delete a helppack, place a check mark next to the corresponding helppack and click **Delete helppack** from the right **Actions** menu. Otherwise continue to step 12.

The **User helppack delete** page is displayed.



Step 11: hh Delete . To cancel the certification deletion, click Cancel .

The Helppack user create page is refreshed, and the helppack updates are reflected.

Step 12: To complete helppack creation, click on Update.

The helppack is created. The **IBM SPM** welcome page is displayed.

4.2.5. Pending Approvals

Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

Step 2: Click the **Action** link found on the SPM Navigation Menu. The Action subcategories are listed.

Note: *You may not see all Action sub-categories listed. Your visibility to Action sub-categories will depend on your assigned user privileges.*

Step 3: Click **Pending approvals** link from the Action sub-category list.

Note: *Your visibility to this link will depend on your assigned user privileges.*

The **Pending approvals** page is displayed.

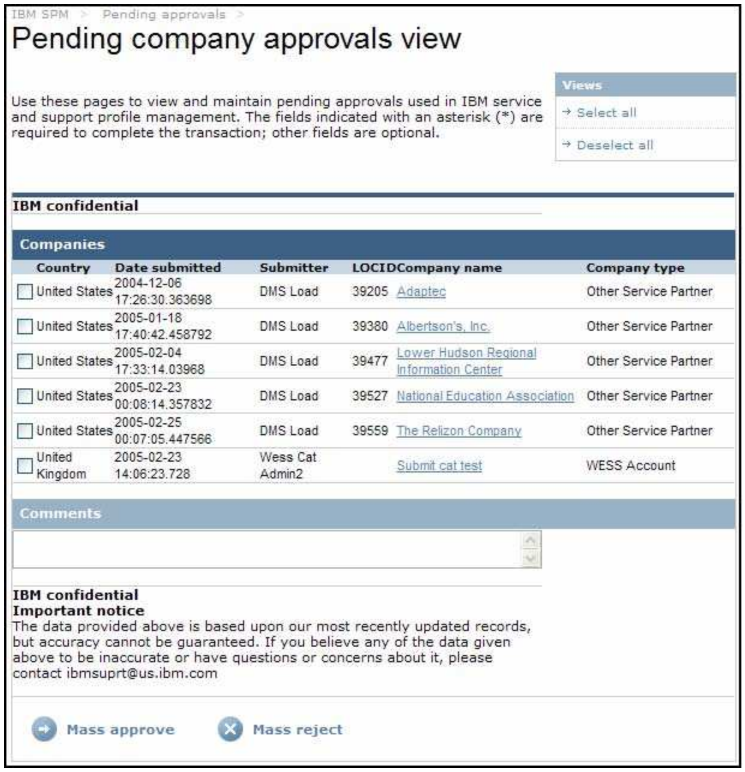
4.2.5.1. Company Approvals

How are Pending Company Approvals created?

Pending Company Approvals are created when a user with **Submit** privileges creates a new company. (See Section 4.2.1 Create BP/SP/OSP/WESS Company for more information on creating a new company.

Step 4: To access pending company approvals, click on the **Company approvals** link. Otherwise skip to step 9.

The **Pending company approvals view** page is displayed.



IBM SPM > Pending approvals >

Pending company approvals view

Use these pages to view and maintain pending approvals used in IBM service and support profile management. The fields indicated with an asterisk (*) are required to complete the transaction; other fields are optional.

Views
→ Select all
→ Deselect all

IBM confidential

Companies

Country	Date submitted	Submitter	LOCID	Company name	Company type
United States	2004-12-06 17:26:30.363698	DMS Load	39205	Adaptec	Other Service Partner
United States	2005-01-18 17:40:42.458792	DMS Load	39380	Albertson's, Inc.	Other Service Partner
United States	2005-02-04 17:33:14.03968	DMS Load	39477	Lower Hudson Regional Information Center	Other Service Partner
United States	2005-02-23 00:08:14.357832	DMS Load	39527	National Education Association	Other Service Partner
United States	2005-02-25 00:07:05.447566	DMS Load	39559	The Relizon Company	Other Service Partner
United Kingdom	2005-02-23 14:06:23.728	Wess Cat Admin2		Submit cat test	WESS Account

Comments

IBM confidential
Important notice
The data provided above is based upon our most recently updated records, but accuracy cannot be guaranteed. If you believe any of the data given above to be inaccurate or have questions or concerns about it, please contact ibmsuprt@us.ibm.com

Mass approve   Mass reject

Step 5: To review an individual company for approval, click on the desired **Company Name** link.

The **Company Approval Request View** page is displayed. To review and approve/reject more than one company at a time, skip to step 7.

IBM SPM > Pending approvals >

Company approval request view

IBM confidential

Reference id: -9993658
Status:
Active: No

General information

Location id	39205
Customer number	0043177
Enterprise number	Adaptec
Headquarters	
CAC number	
Override activation	
Status	Pending

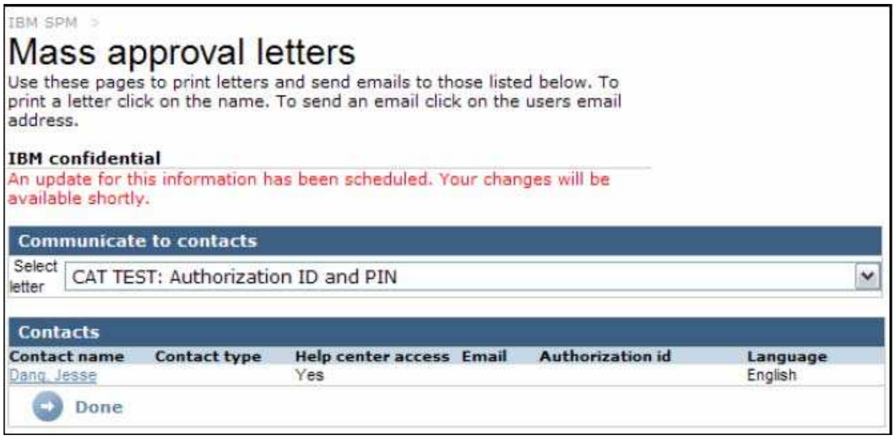
Note: *This is a portion of the page contents.*

Step 6: Review the company information and click Approve or Reject, as appropriate.

If the company is approved, the company status is changed to approved. If no contact is associated to the approved company, the **Pending company approvals view** page is redisplayed, and the approved company is no longer listed.

If a contact is associated to the approved company, the **Mass approval letters** page is displayed.

Select the appropriated letter from **Select setter** field, and click Done. The **Pending company approvals view** page is redisplayed, and the approved company is no longer listed.



If the company was rejected, the company status is changed to rejected.

The **Pending company approvals view** page is redisplayed, and the rejected company is no longer listed.

Step 7: To approve or reject multiple companies at once, click the **Company** check box(s) beside the companies you want to approve or click the **Select all** link from the **Actions** menu on the right to select all companies displayed.

Companies

	Country	Date submitted	Submitter	LOCID	Company name	Company type
☐	United States	2005-01-18 17:40:42.458792	DMS Load	39380	Albertson's, Inc.	Other Service Partner
☑	United States	2005-02-04 17:33:14.03968	DMS Load	39477	Lower Hudson Regional Information Center	Other Service Partner
☐	United States	2005-02-23 00:08:14.357832	DMS Load	39527	National Education Association	Other Service Partner
☑	United States	2005-02-25 00:07:05.447566	DMS Load	39559	The Relizon Company	Other Service Partner
☐	United Kingdom	2005-02-23 14:06:23.728	Wess Cat Admin2		Submit cat test	WESS Account

Step 8: Click Approve or Reject, as appropriate. If a contact is associated to an approved company, the **Mass approval letters** page is displayed. Select the appropriated letter from **Select Letter** field , and click Done .

The **Pending Company Approvals View** page is displayed and the companies approved or rejected are NOT displayed. The company status is changed to approved or rejected, as appropriate.

4.2.5.2. Entitlement Renewals

How are Pending Entitlements created?

Overnight, an agent is run that compares today's date to the company's expiration date. If the expiration date is within 15 days of today's date, the company is placed on the Entitlement Approvals list.

Step 9: To access pending entitlement renewals, click on the **Entitlement renewals** link. Otherwise skip to step 14.

The **Pending entitlement renewals view** page is displayed.

Step 10: To review an individual company for renewal click on the desired **Company name** link. The **Company mass entitlement renewals request** page is displayed. To review renewal and approve/reject more than one company at a time, skip to step 12.

Step 11: Review the company information and click Approve or Reject, as appropriate.

The **Pending entitlement renewals view** page is redisplayed, and the company selected is no longer listed.

Step 12: To review multiple companies at once for renewal, click the **Company** check box(s) beside the companies you want to review or click the **Select all** link from the **Actions** menu on the right to select all companies displayed.

Step 13: Click Mass approve or Mass reject, as appropriate.

The **Pending entitlement renewals view** page is redisplayed, and the companies selected are no longer listed.

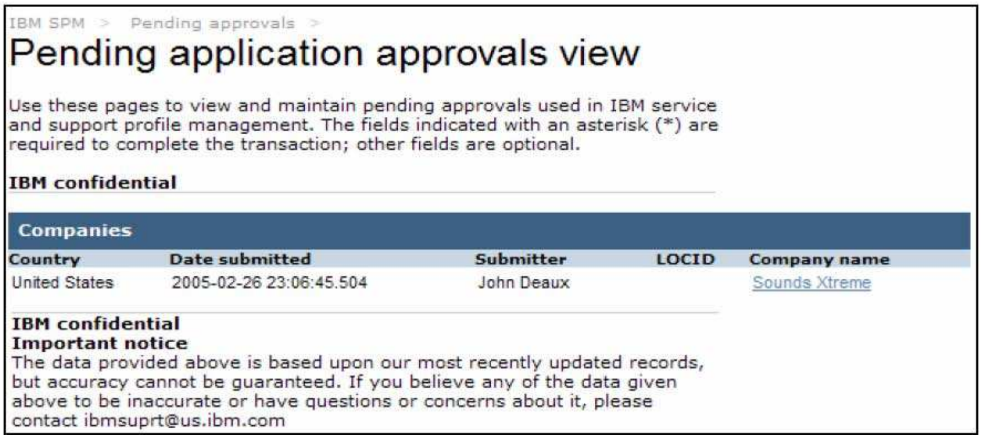
4.2.5.3. Application Approvals

How are Pending SP Applications created?

The SP Application is sent out to the requesting company contact. When the recipient completes and submits the application, the pending record is created. See section 4.2.2 Create SP application for more information on submitting an application.

Step 14: To access pending sp application renewals, click on the **Application approvals** link.

The **Pending application approvals view** page is displayed.


IBM SPM > Pending approvals >

Pending application approvals view

Use these pages to view and maintain pending approvals used in IBM service and support profile management. The fields indicated with an asterisk (*) are required to complete the transaction; other fields are optional.

IBM confidential

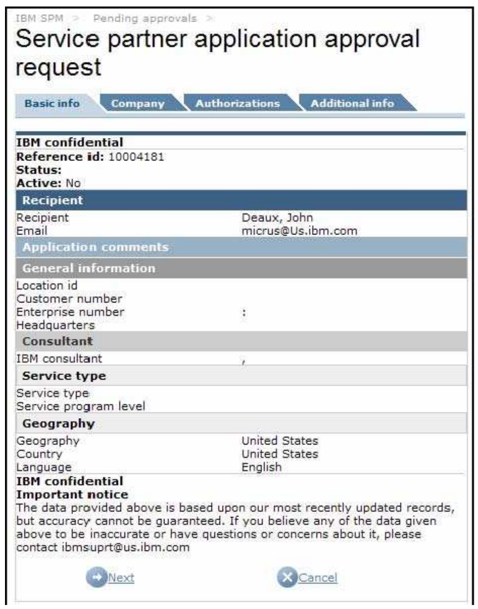
Companies

Country	Date submitted	Submitter	LOCID	Company name
United States	2005-02-26 23:06:45.504	John Deaux		Sounds Xtreme

IBM confidential
Important notice
The data provided above is based upon our most recently updated records, but accuracy cannot be guaranteed. If you believe any of the data given above to be inaccurate or have questions or concerns about it, please contact ibmsuprt@us.ibm.com

Step 15: Click on the desired **Company name** link.

The Service partner application approval request page is displayed.


IBM SPM > Pending approvals >

Service partner application approval request

Basic info | Company | Authorizations | Additional info

IBM confidential
Reference id: 10004181
Status:
Active: No

Recipient

Recipient	Deaux, John
Email	micrus@Us.ibm.com

Application comments

General information

Location id	
Customer number	
Enterprise number	:
Headquarters	

Consultant

IBM consultant	,

Service type

Service type	
Service program level	

Geography

Geography	United States
Country	United States
Language	English

IBM confidential
Important notice
The data provided above is based upon our most recently updated records, but accuracy cannot be guaranteed. If you believe any of the data given above to be inaccurate or have questions or concerns about it, please contact ibmsuprt@us.ibm.com

Next Cancel

Step 16: Review the company information. Navigate through the tabs using the Next button. Once you finish reviewing the application, click Approve or Reject, as appropriate.

If the application is approved, the **Create company** page is displayed, and the information from the application is populated. Complete the SP company creation, following the steps outlined in section 4.2.1 Create BP/SP/OSP/WESS Company of this document.

If the application is rejected, the **Pending application approvals view** is refreshed, and the rejected application is no longer displayed.

4.2.6. Pending Changes

If a company or contact is changed or updated by a user with Submit privileges, an SPM administrator must review and approve or reject the change. In addition, Internal user registrations must also be reviewed and approved.

Step 1: Sign in to the SPM site. See Section 2.0 Signing into SPM for more information.

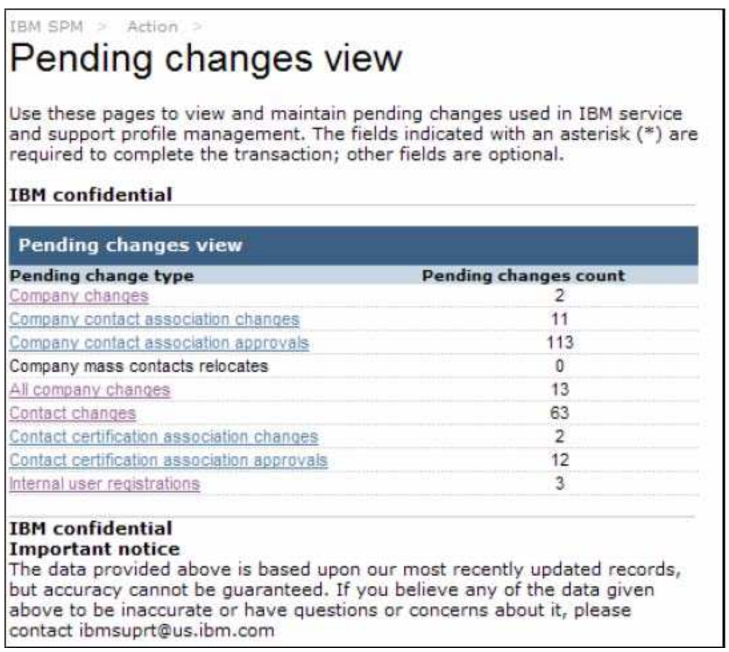
Step 2: Click the **Action** link found on the SPM Navigation Menu. The Action subcategories are listed.

Note: *You may not see all Action sub-categories listed. Your visibility to Action sub-categories will depend on your assigned user privileges.*

Step 3: Click **Pending changes** link from the Action sub-category list.

Note: *Your visibility to this link will depend on your assigned user privileges.*

The **Pending changes view** page is displayed.


IBM SPM > Action >

Pending changes view

Use these pages to view and maintain pending changes used in IBM service and support profile management. The fields indicated with an asterisk (*) are required to complete the transaction; other fields are optional.

IBM confidential

Pending changes view

Pending change type	Pending changes count
Company changes	2
Company contact association changes	11
Company contact association approvals	113
Company mass contacts relocates	0
All company changes	13
Contact changes	63
Contact certification association changes	2
Contact certification association approvals	12
Internal user registrations	3

IBM confidential
Important notice
The data provided above is based upon our most recently updated records, but accuracy cannot be guaranteed. If you believe any of the data given above to be inaccurate or have questions or concerns about it, please contact ibmsuprt@us.ibm.com

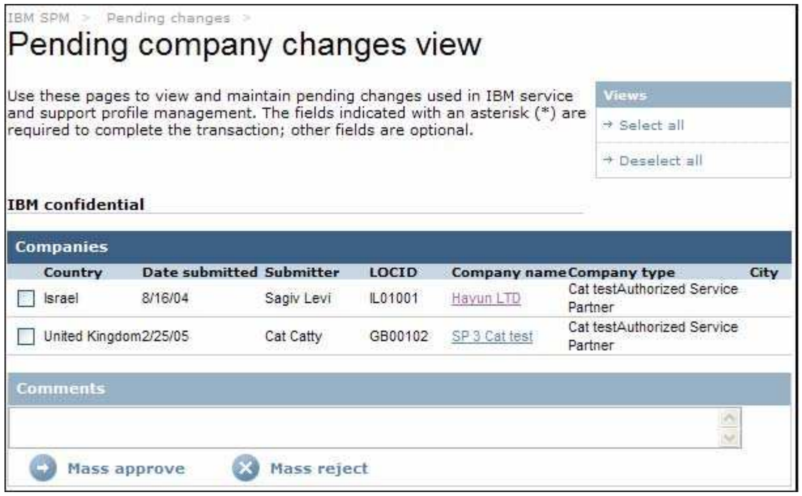
4.2.6.1. Company Changes

How are Pending Company Change Requests created?

Pending Company Change Requests are created when a user with internal **Submit** privileges or an external user with SP or OSP Admin privileges makes a change to a company.

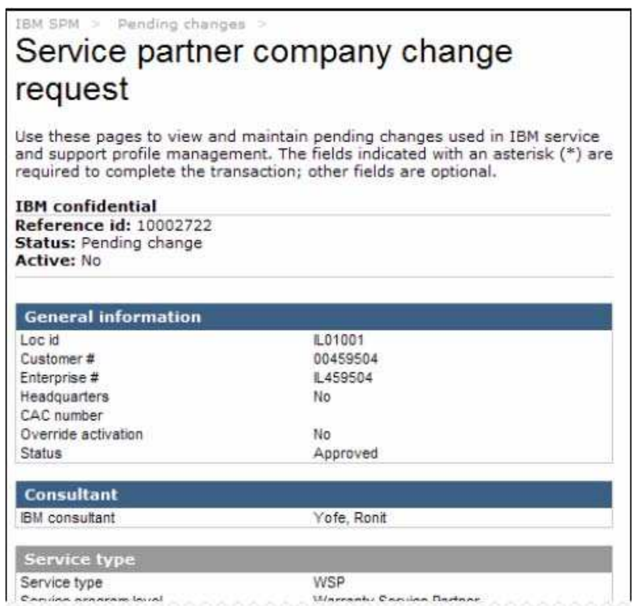
Step 4: To access pending company changes, click on the **Company changes** link. Otherwise skip to step 9.

The **Pending company changes view** screen is displayed.



Step 5: To review changes to an individual company, click on the desired **Company name** link. Otherwise skip to step 7.

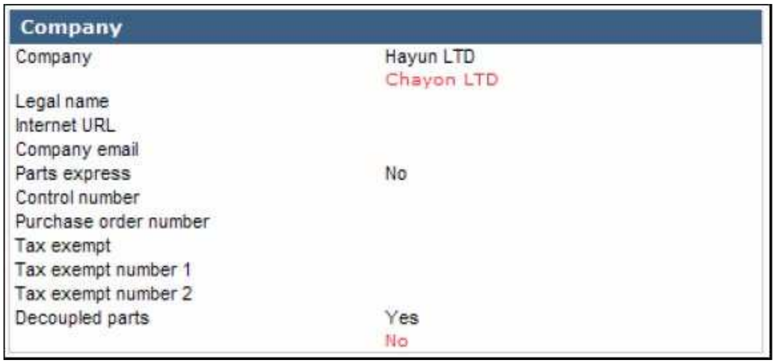
The **BP/SP/OSP/WESS company change request** page is displayed.



Note: *This is a portion of the screen contents.*

Step 6: Review the company's information changes and clic Approve or Reject, as appropriate.

Note*: Changes are noted with* ***red*** *text beneath the original entry within SPM.*



Company	
Company	Hayun LTD Chayon LTD
Legal name	
Internet URL	
Company email	
Parts express	No
Control number	
Purchase order number	
Tax exempt	
Tax exempt number 1	
Tax exempt number 2	
Decoupled parts	Yes No

The **Pending company changes view** page is redisplayed, and the company selected is no longer listed.

Step 7: To review multiple companies at once for change approval, click the **Company** check box(s) beside the companies you want to review or click the **Select all** link from the **Actions** menu on the right to select all companies displayed.

Step 8: Click Mass approve or Mass reject, as appropriate.

The **Pending company changes view** page is redisplayed, and the companies selected are no longer listed.

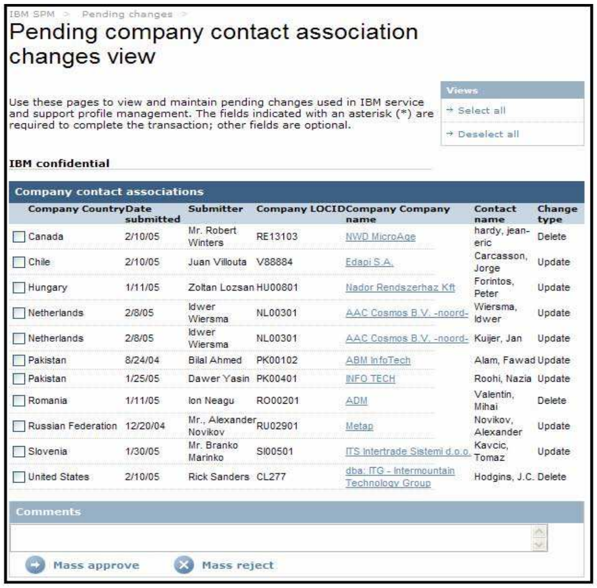
4.2.6.2. Company Contact Association Changes

How are Pending Company Contact Association Requests created?

Pending Company Contact Association Requests are created when a user with internal **Submit** privileges or an external user with SP or OSP Admin privileges makes a change to a company / contact association.

Step 9: To access pending company contact association changes, click on the **Company contact association changes** link. Otherwise skip to step 14.

The **Pending company contact association changes view** screen is displayed.



IBM SPM > Pending changes >

Pending company contact association changes view

Use these pages to view and maintain pending changes used in IBM service and support profile management. The fields indicated with an asterisk (*) are required to complete the transaction; other fields are optional.

Views
→ Select all
→ Deselect all

IBM confidential

Company contact associations

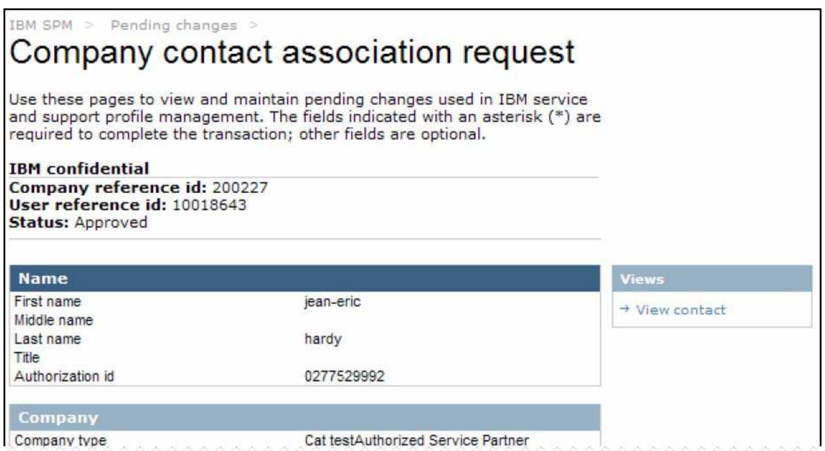
Company Country	Date submitted	Submitter	Company LOCID	Company Company name	Contact name	Change type
Canada	2/10/05	Mr. Robert Winters	RE13103	NWD MicroAge	hardy, jean-eric	Delete
Chile	2/10/05	Juan Villouta	V88884	Edapi S.A.	Carcasson, Jorge	Update
Hungary	1/11/05	Zoltan Lozsan	HU00801	Nador Rendszerhaz Kft	Forintos, Peter	Update
Netherlands	2/8/05	Idwer Wiersma	NL00301	AAC Cosmos B.V. -noord-	Wiersma, Idwer	Update
Netherlands	2/8/05	Idwer Wiersma	NL00301	AAC Cosmos B.V. -noord-	Kuijer, Jan	Update
Pakistan	8/24/04	Bilal Ahmed	PK00102	ABM InfoTech	Alam, Fawad	Update
Pakistan	1/25/05	Dawer Yasin	PK00401	INFO TECH	Roohi, Nazia	Update
Romania	1/11/05	Ion Neagu	RO00201	ADM	Valentin, Mihai	Delete
Russian Federation	12/20/04	Mr., Alexander Novikov	RU02901	Metap	Novikov, Alexander	Update
Slovenia	1/30/05	Mr. Branko Marinko	SI00501	ITS Intertrade Sistemi d.o.o.	Kavcic, Tomaz	Update
United States	2/10/05	Rick Sanders	CL277	dba: ITG - Intermountain Technology Group	Hodgins, J.C.	Delete

Comments

Mass approve Mass reject

Step 10: To review company contact association changes to an individual company, click on the desired **Company name** link. Otherwise skip to step 12.

The **Company contact association request** page is displayed.



IBM SPM > Pending changes >

Company contact association request

Use these pages to view and maintain pending changes used in IBM service and support profile management. The fields indicated with an asterisk (*) are required to complete the transaction; other fields are optional.

IBM confidential
Company reference id: 200227
User reference id: 10018643
Status: Approved

Name

First name	jean-eric
Middle name	
Last name	hardy
Title	
Authorization id	0277529992

Views
→ View contact

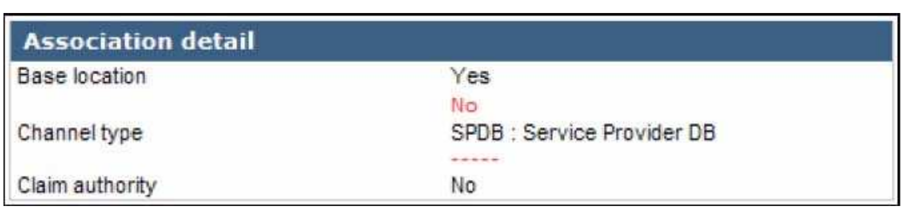
Company

Company type	Cat testAuthorized Service Partner

Note: *This is a portion of the page contents.*

Step 11: Review the association detail changes and clic Approve or Reject, as appropriate.

Note: Changes are noted with **red** text beneath the original entry within SPM. Deletions are reflected with red dashes (---).



Association detail

Base location	Yes No
Channel type	SPDB : Service Provider DB -----
Claim authority	No

The **Pending company contact association changes view** page is redisplayed, and the company selected is no longer listed.

Step 12: To review multiple companies at once for contact association change approval, click the **Company** check box(s) beside the companies you want to review or click the **Select all** link from the **Actions** menu on the right to select all companies displayed.

Step 13: Click Mass approve or Mass reject, as appropriate.

The **Pending company contact association changes view** page is redisplayed, and the companies selected are no longer listed.

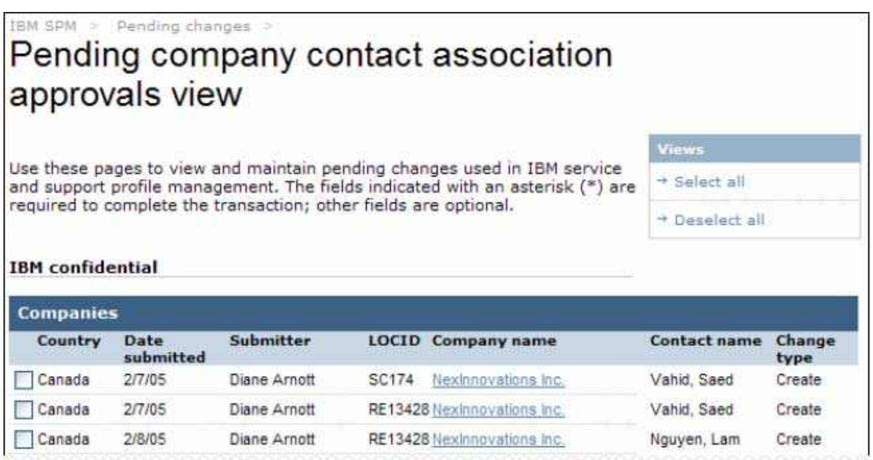
4.2.6.3. Company Contact Association Approvals

How are Pending Company Contact Association Approval Requests created?

Pending Company Contact Association Approval Requests are created when a user with internal **Submit** privileges or an external user with SP or OSP Admin privileges creates a contact association for an existing company.

Step 14: To access pending company contact association approvals, click on the **Company contact association approvals** link. Otherwise skip to step 22.

The **Pending company contact association approvals view** screen is displayed.



Note: *This is a portion of the page contents.*

Step 15: To review company contact association approvals for an individual company, click on the desired **Company name** link. Otherwise skip to step 22.

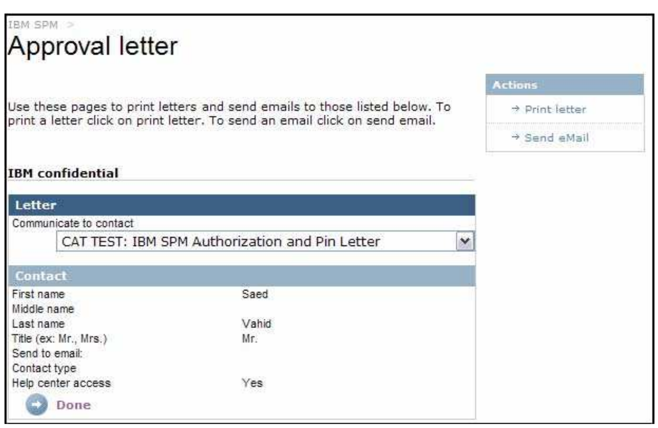
The **Company contact association approvals request** page is displayed.

Note: *This is a portion of the page contents.*

Step 16: Review the information and click Approve or Reject, as appropriate.

If the company contact association is rejected, the **Pending company contact association approvals view** page is redisplayed, and the rejected company is no longer listed. Continue to step 22.

If the company contact association is approved, the **Approval letter** page is displayed. Select the appropriate letter from the **Select letter** field.



Step 17: To print the selected letter, click on the **Print letter** link on the **Actions** menu on the right. Otherwise skip to step 18.

A new browser window will open, and the selected letter will be displayed.

To print the letter, click Print this page. Close the browser window.

Step 18: To email the selected letter, click on the **Send eMail** link on the **Actions** menu on the right. Otherwise, skip to step 19.

Note: *An email address must have been entered during contact creation in order for an email to be sent.*

The **Approval letter email send confirm** page is displayed.

Click Done. The **Approval letter** page is redisplayed.

Step 19: Click Done.
The **Pending company contact association approvals view** page is redisplayed, and the approved company is no longer listed.

Step 20: To review multiple companies at once for contact association approval, click the **Company** check box(s) beside the companies you want to review or click the **Select all** link from the **Actions** menu on the right to select all companies displayed.

Step 21: Click Mass approve or Mass reject, as appropriate.

The **Pending company contact association view** page is redisplayed, and the companies selected are no longer listed.

4.2.6.4. Company Mass Contacts Relocates

How are Pending Company Mass Contact Relocates created?

Pending Company Mass Contact Relocates are created when a user with internal Submit privileges or an external user with SP or OSP Admin privileges moves a contact to or removes a contact from a company / contact association.

Step 22: To access pending company contact association approvals, click the **Company mass contacts relocates** link. Otherwise skip to step 27.

The **Pending mass contacts relocates view** screen is displayed.

Step 23: To review mass contacts relocates for an individual company, click on the desired **Company name** link. Otherwise skip to step 25.

The **Company mass contacts relocates request** page is displayed.

Step 24: Review the contact relocation details and clic Approve or Reject, as appropriate.

The **Pending mass contacts relocates view** page is redisplayed, and the company selected is no longer listed.

Step 25: To review multiple companies at once for mass contacts relocates approval, click the **Company** check box(s) beside the companies you want to review or click the **Select all** link from the **Actions** menu on the right to select all companies displayed.

Step 26: Click Mass approve or Mass reject, as appropriate.

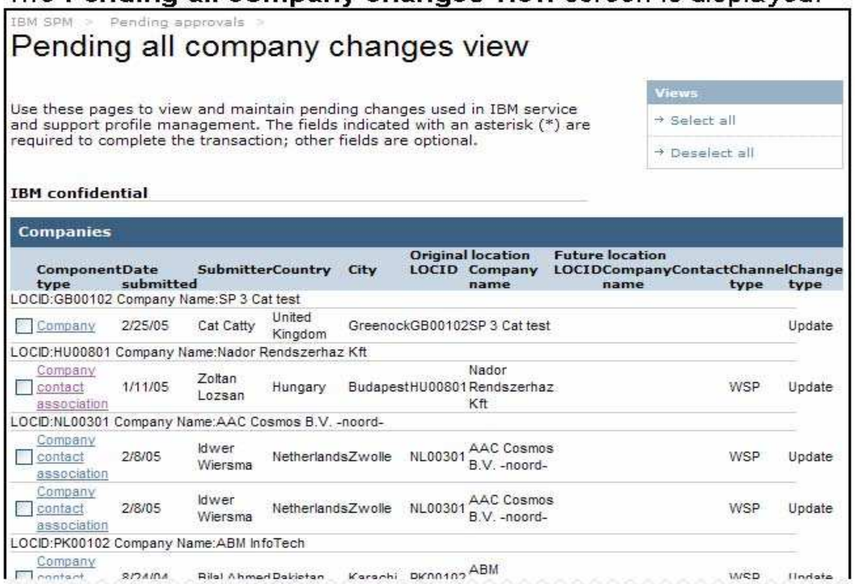
The **Pending mass contacts relocates view** page is redisplayed, and the companies selected are no longer listed.

4.2.6.5. All Company Changes

The **All company changes** link allows you to review all company changes and company contact association changes from one view.

Step 27: To access all company change approvals, click on the **All company changes** link. Otherwise skip to step 32.

The **Pending all company changes view** screen is displayed.



Note: *This is a portion of the page contents.*

Step 28: To review company changes for an individual company, click on the **Company** component type link. Otherwise skip to step 29.

The **BP/SP/OSP/WESS company change request** page is displayed. See section 4.2.6.1 Company Changes for more information on approving or rejecting company changes.

Step 29: To review company contact association changes for an individual company, click on the **Company contact association** component type link. Otherwise skip to step 30.

The **Company contact association** request page is displayed. See section 4.2.6.2 Company Contact Association Changes for more information on approving company contact association changes.

Step 30: To review multiple companies and company contact associations at once for mass approval or rejection, click the **Component type** check box(s) beside the companies you want to review or click the **Select all** link from the **Actions** menu on the right to select all component types displayed.

Step 31: Click Mass approve or Mass reject, as appropriate.

The **Pending all companies change view** page is redisplayed, and the component types selected are no longer listed.

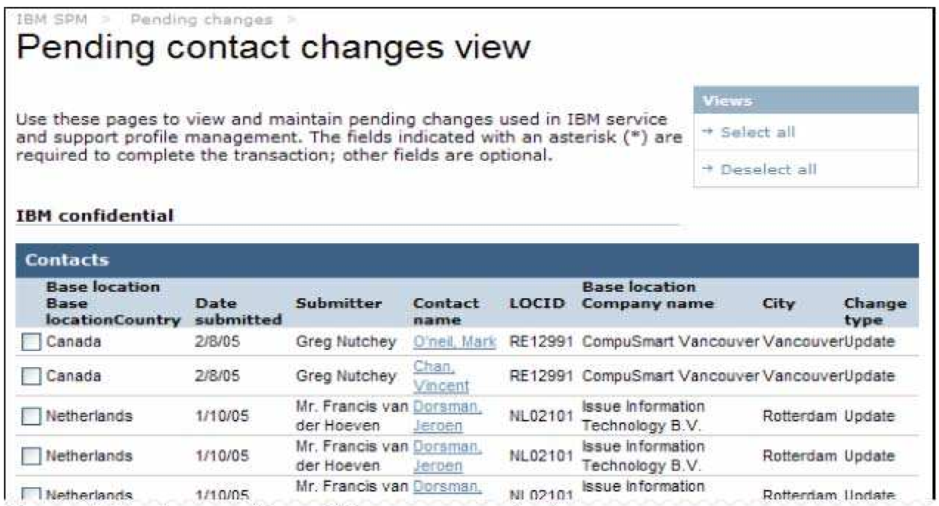
4.2.6.6. Contact Changes

How are Pending Contact Change Requests created?

Pending Contact Change Requests are created when a user with internal **Submit** privileges or an external user with SP or OSP Admin privileges makes a change to a contact (Clicks the **Edit** link beside the contact). These roles include: BP Admin 2, WESS Admin 2, WESS TSAR & WESS Rep, SP & OSP External Admin privileges.

Step 32: To access pending contact change requests, click on the **Contact changes** link. Otherwise skip to step 37.

The **Pending contact changes view** page is displayed.



IBM SPM > Pending changes >

Pending contact changes view

Use these pages to view and maintain pending changes used in IBM service and support profile management. The fields indicated with an asterisk (*) are required to complete the transaction; other fields are optional.

Views
- Select all
- Deselect all

IBM confidential

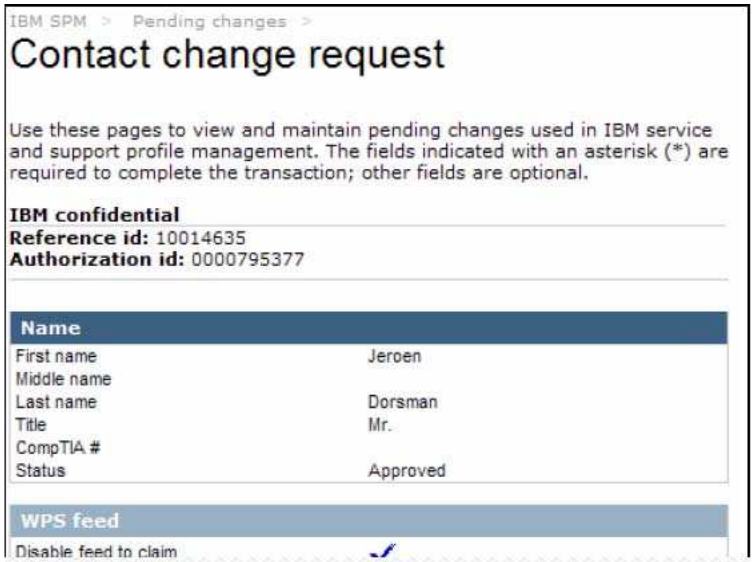
Contacts

Base location Base locationCountry	Date submitted	Submitter	Contact name	LOCID	Base location Company name	City	Change type
Canada	2/8/05	Greg Nutchey	O'neil, Mark	RE12991	CompuSmart Vancouver	Vancouver	Update
Canada	2/8/05	Greg Nutchey	Chan, Vincent	RE12991	CompuSmart Vancouver	Vancouver	Update
Netherlands	1/10/05	Mr. Francis van der Hoeven	Dorsman, Jeroen	NL02101	Issue Information Technology B.V.	Rotterdam	Update
Netherlands	1/10/05	Mr. Francis van der Hoeven	Dorsman, Jeroen	NL02101	Issue Information Technology B.V.	Rotterdam	Update
Netherlands	1/10/05	Mr. Francis van	Dorsman,	NL02101	Issue Information	Rotterdam	Update

***Note:** This is a portion of the page contents.*

Step 33: To review contact changes for an individual contact, click on the desired **Contact name** link. Otherwise skip to step 35.

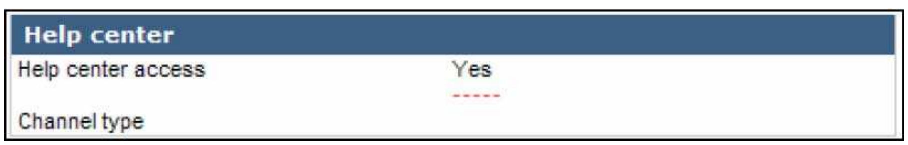
The **Contact change request** page is displayed.



***Note:** This is a portion of the page contents.*

Step 34: Review the contact information and click Approve or Reject, as appropriate.

Note*: Changes are noted with* ***red*** *text beneath the original entry within SPM. Deletions are reflected with red dashes (- - -).*



The **Pending contact changes view** page is redisplayed, and the contact selected is no longer listed.

Step 35: To review multiple contacts at once for contact change approval, click the check box(s) beside the contacts you want to review or click the **Select all** link from the **Actions** menu on the right to select all contacts displayed.

Step 36: Click Mass approve or Mass reject, as appropriate.

The **Pending contact changes view** page is redisplayed, and the contacts selected are no longer listed.

4.2.6.7. Contact Certification Association Changes

How are Pending Contact Certification Association Change Requests created?

Pending Contact Certification Association Change Requests are created when a user with **external** SP or OSP Admin privileges makes a change to an existing contact certification association.

Step 37: To access pending contact certification association changes, click on the **Contact certification association changes** link. Otherwise skip to step 42.

The **Pending contact certification association changes view** screen is displayed.

Step 38: To review contact certification association changes for an individual contact, click on the desired **Contact country** link. Otherwise skip to step 40.

The **Contact certification association request** page is displayed.

Note: *This is a portion of the page contents.*

Step 39: To review the contact certification association details and click Approve or Reject, as appropriate.

Note: *Changes are noted with* ***red*** *text beneath the original entry within SPM. Deletions are reflected with red dashes (- - -).*

Association detail	
Certification number	
Certified	✓
Date taken	2/14/04
	2/14/02
Expiration date	2/14/05

The **Pending company contact association changes view** page is redisplayed, and the company selected is no longer listed.

Step 40: To review multiple changes at once for contact association change approval, click the check box(s) beside the contacts you want to review or click the **Select all** link from the **Actions** menu on the right to select all contacts displayed.

Step 41: Click Mass approve or Mass reject, as appropriate.

The **Pending contact certification association changes view** page is redisplayed, and the contacts selected are no longer listed.

4.2.6.8. Contact Certification Association Approvals

How are Pending Contact Certification Association Approval Requests created?

Pending Contact Certification Association Approval Requests are created when a user with **external** SP or OSP Admin privileges creates a contact certification association.

Step 42: To access pending contact certification association approvals, click on the **Contact certification association approvals** link. Otherwise skip to step 47.

The **Pending contact certification association approvals view** page is displayed.

Step 43: To review contact certification associations for an individual contact, click on the desired **Contact** link. Otherwise skip to step 45.

The **Contact certification association request** page is displayed.

Step 44: To review contact certification associations contact details and click Approve or Reject, as appropriate.

The **Pending company contact certification association approvals view** page is redisplayed, and the contact selected is no longer listed.

Step 45: To review multiple contact certification associations at once, click the check box(s) beside the contacts you want to review or click the **Select all** link from the **Actions** menu on the right to select all contacts displayed.

Step 46: Click Mass approve or Mass reject, as appropriate.

The **Pending contact certification association approvals view** page is redisplayed, and the contacts selected are no longer listed.

4.2.6.9. Internal User Registrations

How are Pending Internal User Registration Requests created?

Pending Internal User Requests are created when an Internal user registers for access to SPM at the Internal User Registration page.

Step 47: To access pending contact certification association changes, click on the **Contact certification association changes** link.

The **Pending internal user registrations view** page is displayed.

IBM SPM > Pending changes >

Pending internal user registrations view

Use these pages to view and maintain pending changes used in IBM service and support profile management. The fields indicated with an asterisk (*) are required to complete the transaction; other fields are optional.

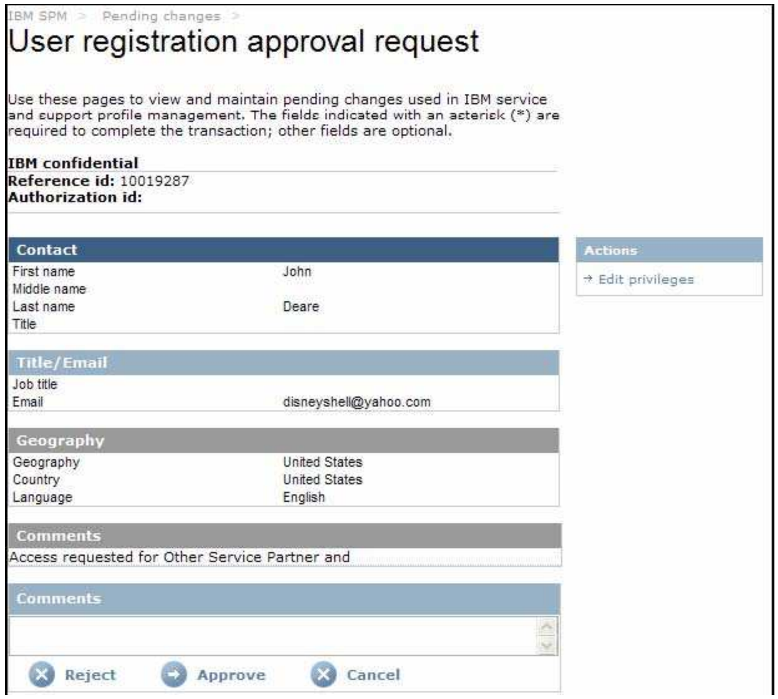
IBM confidential

Registrations

Country	Date submitted	Submitter	Comments
Canada	12/17/04	last, test	Access requested for Authorized Service Partner and
Canada	12/17/04	url, tst	Access requested for
United Kingdom	1/17/05	Koets, Koos	Access requested for Authorized Service Partner and InfoTips
United Kingdom	1/18/05	Warwel, Ralf	Access requested for Authorized Service Partner and InfoTips
United States	1/18/05	Harris, Scott	Access requested for Authorized Service Partner and InfoTips
United States	1/18/05	Russo, Michelle	Access requested for
United States	1/18/05	Deare, John	Access requested for Other Service Partner and
United States	1/18/05	Hood, Robin	Access requested for Authorized Service Partner and
United States	1/18/05	time, Third	Access requested for Authorized Service Partner and
United States	1/18/05	Time, Forth	Access requested for Authorized Service Partner and
United States	1/18/05	Workfurme, Pleeze	Access requested for Authorized Service Partner and
United States	1/19/05	Wurk, Pleeze	Access requested for
United States	1/19/05	user, tst	Access requested for Authorized Service Partner and

Step 48: To review an internal user registration, click on the desired **Country** link.

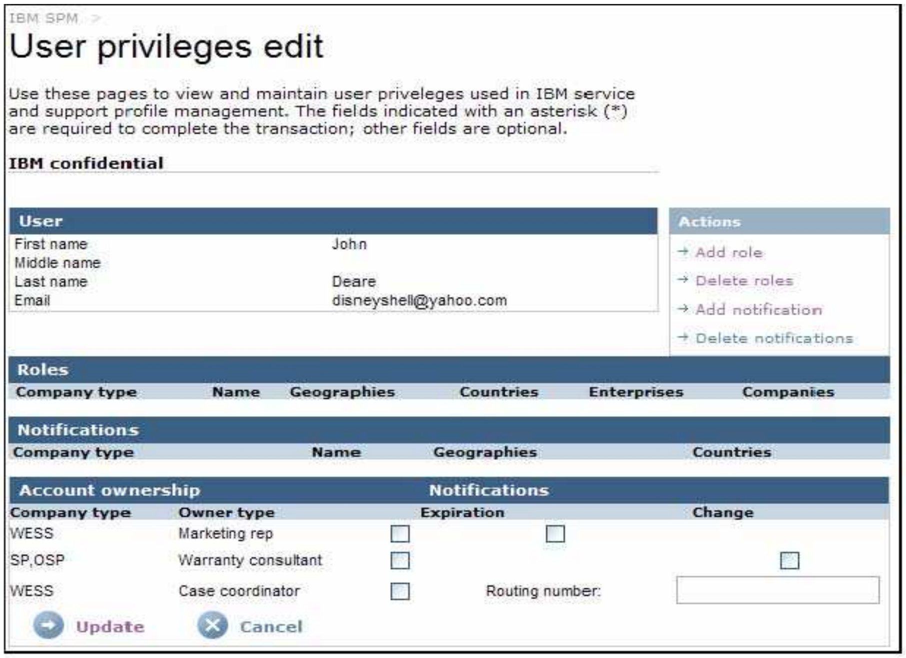
The **User registration approval request** page is displayed.



Step 49: To edit user privileges, click on the **Edit privileges** link from **Actions** menu on the right.

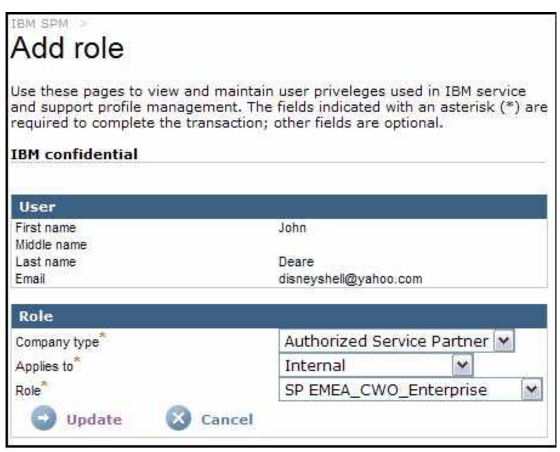
The **User registration approval request** page is displayed.

The **User privileges edit** page is displayed.



Step 51: To add a role to the user, click on the **Add role** link from the **Actions** menu on the right.

The **Add Role** page is displayed.

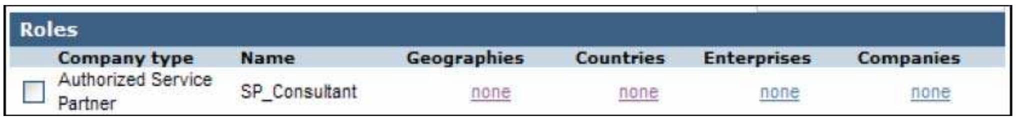


Step 52: Complete the following fields, as appropriate.

. • **Company type**
. • **Applies to**
. • **Role**

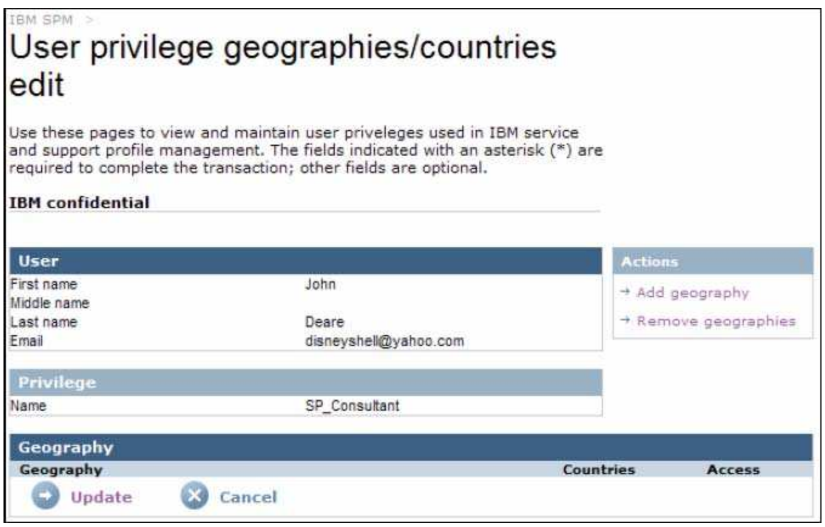
Step 53: Click Update

The **User privileges edit** page redisplays, and the selected role is displayed.

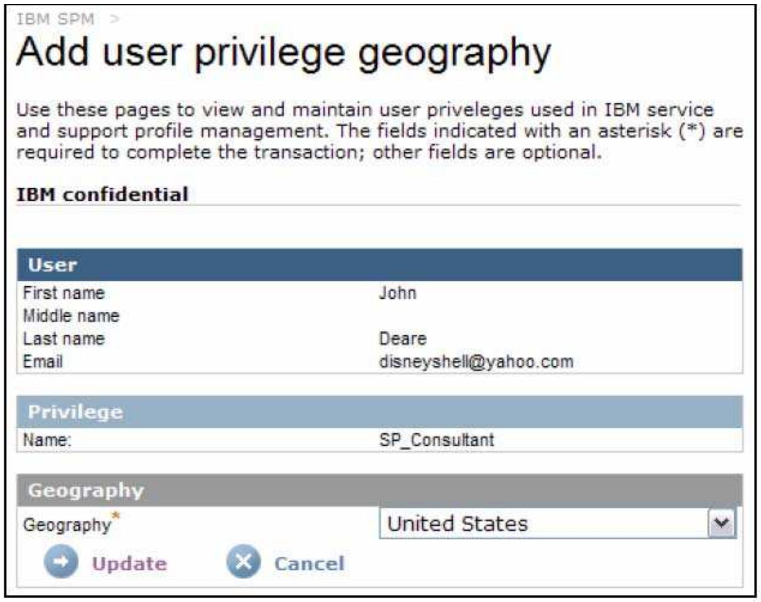


Step 54: Click the **none** link under the Geographies column to associate the appropriate geography(s) to the role.

The **User privilege geographies/countries edit** page is displayed.

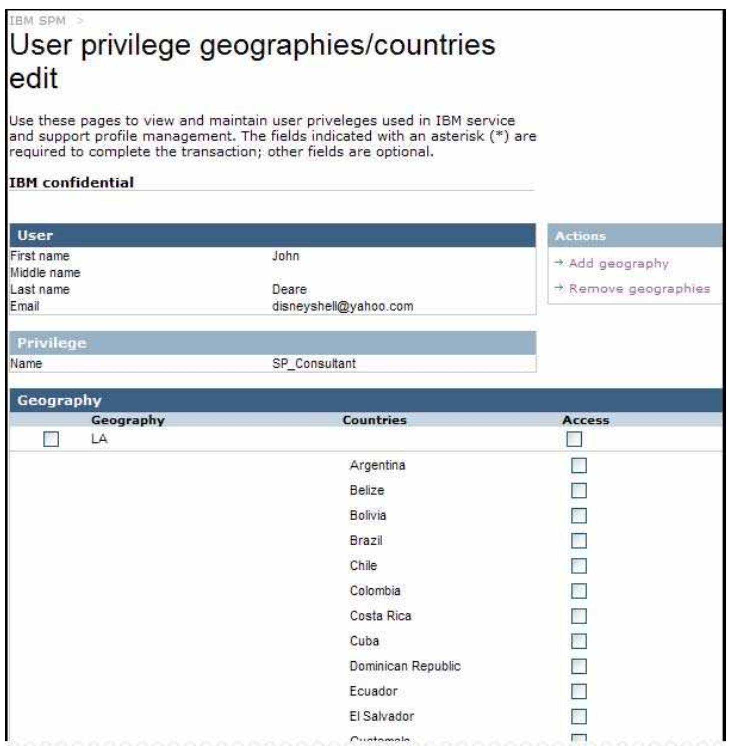


Step 55: Click the **Add geography** link from the **Actions** menu on the right. The **Add user privilege geography** page is displayed.

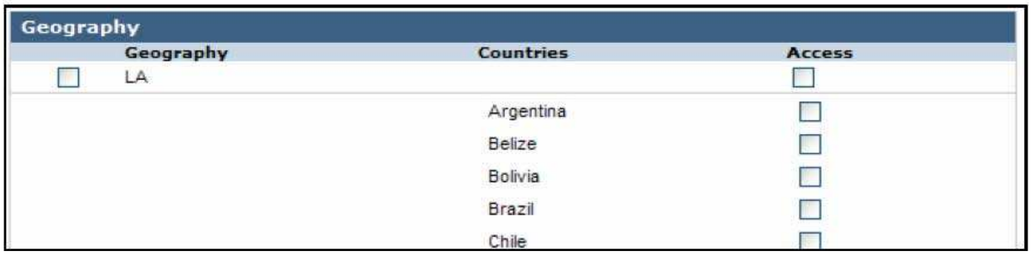


Step 56: Select the applicable geography from the **Geography** pick list. Click **Update**.

The **User privilege geographies/countries edit** page is displayed.



Step 56: Click the first checkbox to select all countries in the geography, or select individual country checkboxes to assign the role to only select countries within the geography.



Step 57: To add additional geographies, repeat steps 55 and 56. Otherwise continue to step 58.

Step 58: Click Update

The **User registration approval request** page is redisplayed.

Step 59: Click Approve or Reject, as appropriate.

If the user registration is rejected, the **Pending company contact association approvals view** page is redisplayed, and the rejected company is no longer listed. Continue to step 22.

If the user registration is approved, the **Approval letter** page is displayed. Select the appropriate letter from the **Select letter** field.

Step 60: To print the selected letter, click on the **Print letter** link on the **Actions** menu on the right. Otherwise skip to step 61.

A new browser window will open, and the selected letter will be displayed.

To print the letter, click Print this page. Close the browser window.

Step 61: To email the selected letter, click on the **Send eMail** link on the **Actions** menu on the right. Otherwise, skip to step 62.

Note: *An email address must have been entered during user creation in order for an email to be sent.*

The **Approval letter email send confirm** page is displayed.

Click Done . The **Approval letter** page is redisplayed.

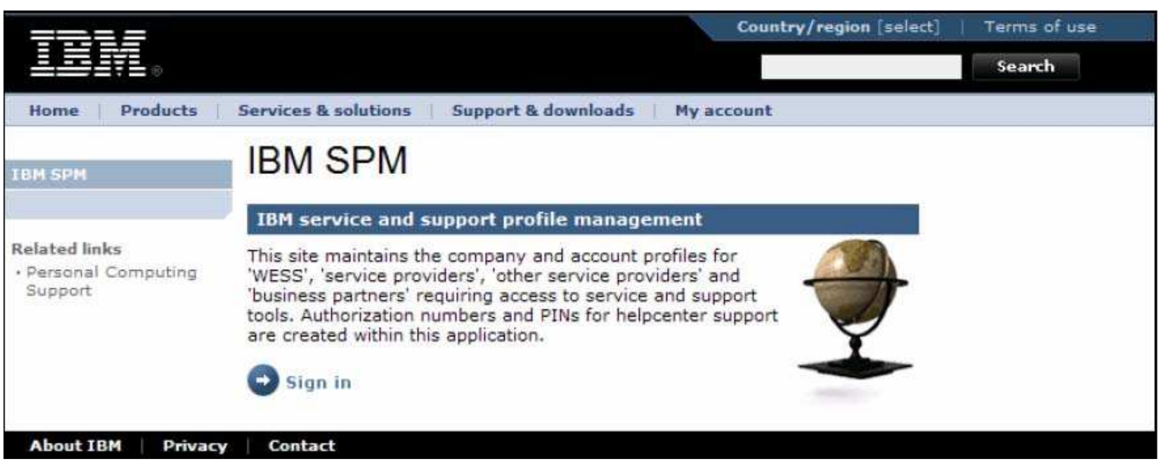
Step 62: Click Done. The **Pending internal user registrations view** page is redisplayed and the approved user is no longer listed.

5.0 Signing out of SPM

When you are ready to leave the SPM site, be sure to Sign out.

Step 1: Click the **Sign out** link, found on the left Navigation Menu.

The **IBM SPM** page is displayed. You are now logged out of the SPM website.



6.0 IMPORTANT NOTE

This is not a complete version of the SPM Users Guide. The full version should be posted on the SPM website in the near future. Until then, please contact your SPM Geography Representative if you have any questions regarding function not covered in this guide