

IBM SPM

Service Manager / SPM Administrator

Manual



IBM SPM

INDEX

Service Manager /Administration – Location Profile Manual

Editing Your Company Information – Change Request...	Pg. 1
Company's Authorized to Service View...	Pg. 5
View Company's Technical Training...	Pg. 6
View Associated Contacts...	Pg. 7
Edit Company Contacts...	Pg. 8
Change Contact's Certifications...	Pg.13
Change the Contact's Privileges...	Pg.15
Resend a Contact's PIN...	Pg.17

SERVICE MANAGER /ADMINISTRATION – LOCATION PROFILE MANUAL

A. THE COMPANY LOCATION PROFILE UPDATE

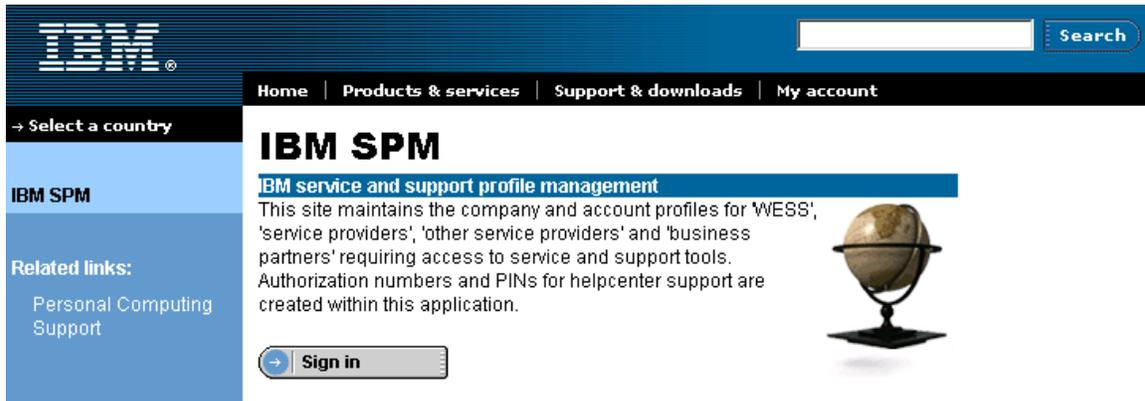
NOTE:

The links you see will depend on your **User Privileges**. You may not see every link shown in this manual.

1. Editing Your Company Information via Change Request

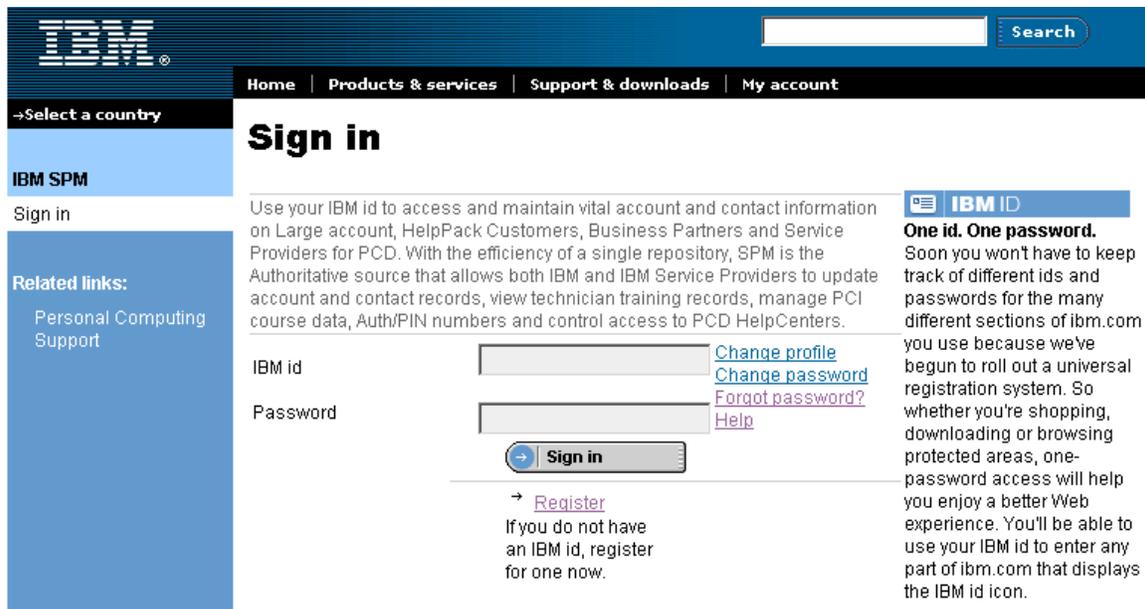
Step 1: Access the **SPM** website. (first-time user's refer to Registration Sign-In Manual for assistance)

Step 2: Click the **Sign in** link or the **IBM SPM** link. The SPM Sign in page is displayed.



The screenshot shows the IBM SPM website. At the top is the IBM logo and a search bar. Below the logo is a navigation menu with links for Home, Products & services, Support & downloads, and My account. A sidebar on the left contains a 'Select a country' dropdown and a list of related links including 'Personal Computing Support'. The main content area features the heading 'IBM SPM' and a sub-heading 'IBM service and support profile management'. Below this is a paragraph describing the site's purpose and a 'Sign in' button. To the right of the text is a small image of a globe on a stand.

Step 3: Log into the application with your own created IBM id and Password.



The screenshot shows the IBM SPM Sign in page. It features the same navigation and sidebar as the previous page. The main heading is 'Sign in'. Below the heading is a paragraph explaining the use of IBM id. To the right of this paragraph is a section titled 'IBM ID' with the text 'One id. One password.' and a detailed explanation of the registration system. Below the text are two input fields for 'IBM id' and 'Password', followed by a 'Sign in' button. Below the button is a link to 'Register' with a note: 'If you do not have an IBM id, register for one now.' To the right of the input fields are links for 'Change profile', 'Change password', 'Forgot password?', and 'Help'.

Sign-in Issues please Contact the Help Desk at 1-888-426-4409.

The user is logged into the main **Welcome** page.

The screenshot shows the IBM website's main navigation bar with the IBM logo, a search box, and links for Home, Products & services, Support & downloads, and My account. Below the navigation bar is a 'Select a country' dropdown menu. The main content area features a large 'Welcome' heading and a personalized greeting: 'Hello, Canada Administrator'. To the right of the greeting is a small image of a globe. Below the greeting is a paragraph of text: 'You have accessed the IBM service & support home page. This site provides easy access to commonly used tools to assist in your day to day business needs.' To the left of the main content is a vertical sidebar with a 'Welcome' section containing links for IBM SPM, Help, SSG, ECAs & dealer tips, and Sign out. Below this is a 'Related links:' section with links for Personal Computing Support, Eclaim, PartnerWorld, eSAR, Education, Warranty Lookup, and Parts Lookup. The main content area also contains several informational links: 'IBM service and support profile management' (SPM), 'Personal computing support', 'Prism updates', 'Service support guide (SSG)', and 'ECAs & dealer tips'. At the bottom of the main content area is a blue bar with the text 'Information for business partners'.

Step 4: Click the **IBM Service and Support Profile Management** link or the **IBM SPM** link.

The **Company Location id View** page is displayed. (Available to Authorized Users Only)

The screenshot shows the 'Company Location id View' page. The top navigation bar is identical to the previous screenshot. Below the navigation bar is a 'Select a country' dropdown menu. The main content area features a large 'Locations' heading. Below the heading is a blue bar with the text 'IBM service and support profile management'. Below this bar is a section titled 'Enterprise' with a blue bar. Below the 'Enterprise' section is a table with the following data:

Location id	Company name	City	State
033010	MICRO-P	MADRID	Madrid
033010	MICRO-b	BARCELONA	Barcelona
033010	MICRO-b	VALENCIA	Valencia
033010	APEN	Schelle	Antwerpen

At the bottom of the page is a footer with links for About IBM, Privacy, Legal, and Contact.

Step 5: Select the location you want to edit or view by clicking the **Location ID** link.

The **Company Profile** page is displayed.

Company profile

Reference id:300378

+ Company

[Authorized to service](#)
[Technical training](#)
[View associated contacts](#)
[Change request](#)

Basic		Service type	
Loc id:		Service type:	FORCCR
Customer #:		Service program level:	
Enterprise #:			
Headquarters:	No	Geography	
CRC Number:		Geography:	Europe, Middle East and Asia
		Country:	Spain
		Language:	English

Consultant	
IBM consultant:	Almudena
IBM consultant email:	

Approved brands	Authorized to service	Facilities for	
		Carry in	On site
Options		✓	✓
PWS		✓	✓
Server		✓	✓
Notebooks		✓	✓
Mobiles		✓	✓
Visuals		✓	✓

Top

Company		Internet URL	
Company:	MICRO	Company email:	
Legal name:			

Address		Alternate address	
Address 1:	RAFEL	Address 1:	
Address 2:		Address 2:	
Address 3:		Address 3:	
City:	MADRID	City:	
City section:		City section:	Madrid
State:	Madrid	State:	Spain
Country:	Spain	Country:	Spain
Postal code:	28010	Postal code:	
Phone #:	9349159	Phone #:	
Fax #:		Fax #:	

Local | Contact

Step 6: Click the **Change Request** link to edit or change company profile information.

Company profile

Reference id:300378

+ Company

[Authorized to service](#)
[Technical training](#)
[View associated contacts](#)
[Change request](#)

Basic		Service type	
Loc id:	033040M	Service type:	FORCCR

The **Company Profile Edit** page is displayed in edit mode.

Company profile edit

Cancel
 Submit

Company

Brands

Basic		Service type	
LocId:	0222	Service type:	ICRCCR
Customer #:	320	Service program level:	
Enterprise #:			
Headquarters:	No		
CWC number:			

Geography	
Geography:	Europe, Middle East and Asia
Country:	Spain
Language:	Spanish

Consultant	
IBM consultants:	Almudena
IBM consultant email:	

Top

Company	
Company:	MICRO
Legal name:	
Internet URL:	
Company email:	

Address		Alternate address	
Address 1:	RAFAEL CALVO, 7	Address 1:	
Address 2:		Address 2:	
Address 3:		Address 3:	
City:	MADRID	City:	
City section:		City section:	
State:	Madrid	State:	Madrid
Country:	Spain	Country:	Spain
Postal code:	28010	Postal code:	
Phone #:	+3491594	Phone #:	+
Fax #:		Fax #:	

Top

Approved brands	Facilities for	
	Carry in	On site
Options	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
pws	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Server	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Net/ata	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobiles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vituals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Legal
Contact

Step 7: Make the required changes to the company and click **Submit**.

The Change Request has been submitted for approval.

NOTE:

The changes made will not be displayed until your Service Consultant approves them. Please allow 3 business days and/or 72 hours.

2. View the Company's Authorized to Service

To view the brands the company is authorized to service:

Step 1: Click the **Authorize to Service** link.



The **Company Authorized to Service** page is displayed.

Company authorized to service

[Done](#)

Company	
Company:	MICRO
Legal name:	
LOCID:	0330
City:	BARCELONA
City section:	
State:	Barcelona
Country:	Spain

Contacts listed below have met training requirements to be authorized to service specific brands. Contacts will be available for claim processing based on contact type stipulation within their location's geography.

Brand	Contact name	Count
Netvisio	Ramon S. Fariol	3
	Gomez, Miquel	
	Riera Madriest, Francisco	
None		0

NOTE:

You may also view the contact information by clicking the [Contact Name](#) link.

Step 2: Click the **Done** link to return to the **Company Profile** page.

3. View the External Company's Technical Training

To view the Technical Training of the company's contacts:

Step 1: Click the **Technical Training** link.



The **Company Technical Training** page is displayed.

Company technician training

The screenshot displays the 'Company technician training' page. At the top right is a 'Done' button. Below it, company details are shown: Company: MICRO, City: BARCELONA, State: Barcelona, Country: Spain. A table lists training courses with their respective contact names and counts.

Course	Contact name	Count
RDCE2 - IBM Desktop Systems Service Training	Ruiz Medinol Sanz Molina Gonzalez Gonzalez	4
RDTE2 - IBM NetVista Service Training	Domate Medina Ruiz Sanz Molina Sanz Rafael	5
RDCE3 - IBM Mobile Systems Service Training	Ruiz Medinol Sanz Molina Gonzalez	4
XR401 - Servicing IBM x-Series Servers Part 1	Ruiz Medinol Gonzalez Hector Gonzalez Sergio	4
XR402 - Servicing IBM x-Series Servers Part 2	Masot Rosa Medina Hector Ruiz Medinol	2
None - none	Fernandez Santolana Vicente Castellano Javier Calvo Cesar Grau Joan Mondue	6

Legal | Contact

Company Technical Training page

NOTE:

You can also view the contact information by clicking the **Contact Name** link.

Step 2: Click the **Done** link to return to the **Company Profile**.

4. A. View Associated Contacts

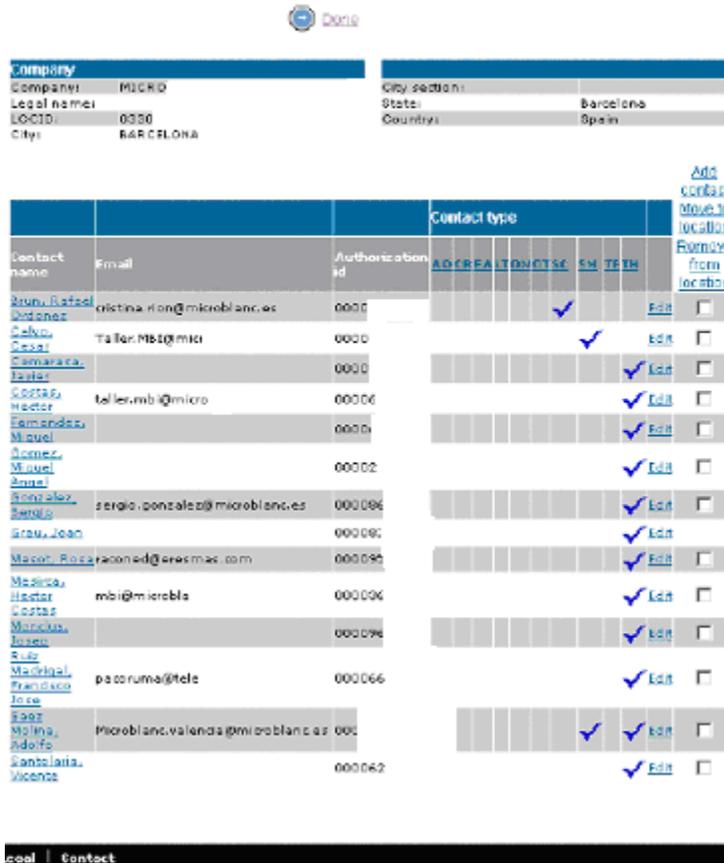
To view the contacts associated to the company:

Step 1: Click the **View Associated Contacts** link.



The Existing Company Contacts View page is displayed.

External existing company contacts view



Existing Company Contacts View page.

Step 2: Click **Done** to return to the **Company Profile** page.

4. B. Edit Your Company Contacts

You can change the contact information by clicking the **Edit** link or by clicking the **Change Contact name Information** link. The information available for change is different, depending on which link you select.

Change Contact name Information link allows you to change the Name, Title, Comp TIA #, Job Title, Email Address, Work Phone Number, Service Manager / Administrator's Email Address, Help Center Access Flag, Geography, Country, and Language.

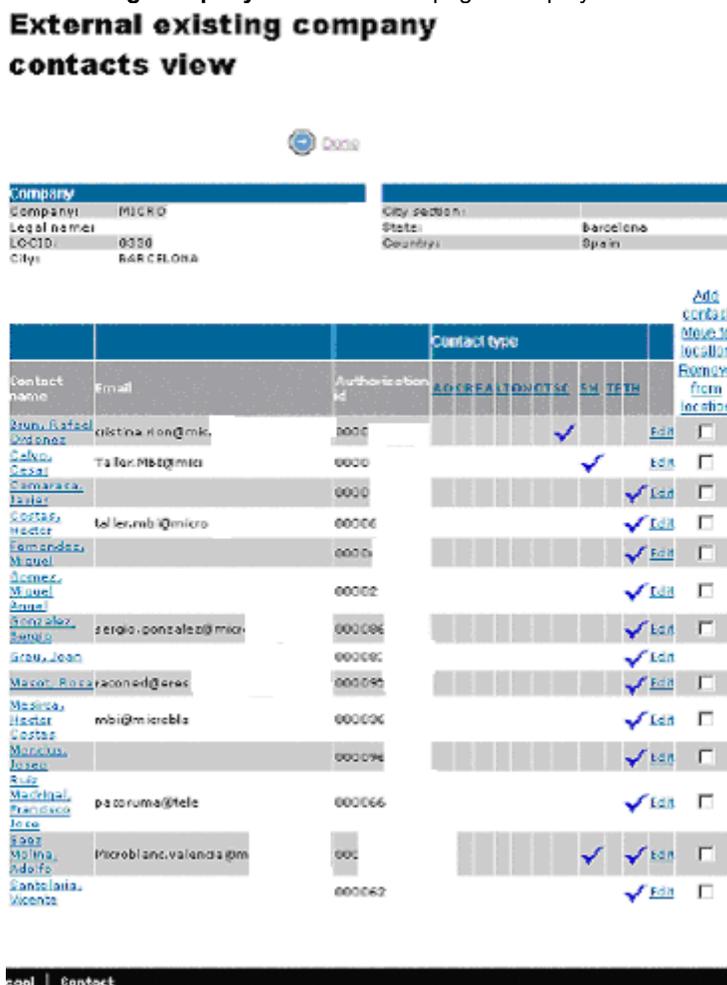
Edit link allows you to change the contact's Association Detail / Base Location Flag and the Contact Type.

a. Change Contact Information Link

Step 1: Click the View Associated Contacts link.



The External Existing Company Contacts View page is displayed.



Existing Company Contacts View page

Step 3: Click the **Change Contact Information** link to change the contact's information:



The **External Contact Edit** page is displayed:

External contact edit

Name: Rafael Brun
Authorization id: 0000

[Cancel](#) [Submit](#)

Name		Title/Email	
* First name	Rafael	Job title	
Middle name	Dad	Email	crisina_@micro
* Last name	Bru	Work phone #	
Title (opt. Mr., Mrs.)		Service manager/Admin email	Microt_@micro
CompTIA #		Help center	
		* Help center access	Yes
		Geography	
		* Geography	Europe, Middle East and Asia
		* Country	Spain
		* Language	Spanish

Legal | Contact

Step 4: Make your changes and click the **Submit** link to submit your changes, or **Cancel** to cancel the changes made. From this page, you can change:

- Name
- Title
- Comp TIA #
- Job Title
- Email Address
- Work Phone Number
- Service Manager / Administrator's Email Address
- Help Center Access Flag
- Geography, Country, and Language

Your changes have been submitted and are pending approval. You are returned to the **External Contact View**.

NOTE:

Your contact change request has been submitted and is pending approval for your Service Consultant. Please allow 3 business days and/or 72 hours.

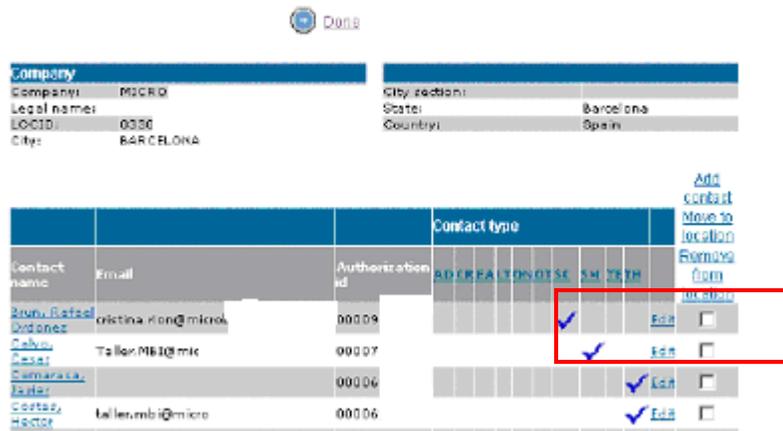
b. Edit Link

Step 1: Click the **View Associated Contacts** link.



Step 2: Click the **Edit** link beside the contact you want to view.

External existing company contacts view



External Existing Company Contacts View page

The Contact Name, Title, and Company Location ID is displayed.



The **External Contact Company Association** page is displayed:

The Contact information that can be edited:

Association Detail / Base Location Flag (mailing address)

Contact Type

	Contact type									
Contact name	AD	CR	EA	LT	ON	OT	SC	SM	TE	TH

Contact type		
* Administrator	<input type="checkbox"/>	ie. Accounts Payable
* Customer Relations Advocate	<input type="checkbox"/>	
* EClaim Administrator	<input type="checkbox"/>	ie. eClaim Administrator
* Lead Technician	<input type="checkbox"/>	
* Other	<input type="checkbox"/>	ie. all others - sales, purchasing etc.
* Owner	<input type="checkbox"/>	
* Service Contact	<input type="checkbox"/>	ie. Contact person who receives all notifications
* Service Manager	<input checked="" type="checkbox"/>	ie. SM for each Loc. id
* Technician	<input type="checkbox"/>	
* Training Education	<input type="checkbox"/>	

* At least one contact type has to be specified

**** Note: please have one "Service Contact" in your organization to receive all communications.

Step 3: Make the changes to the contact and click the **Submit** link when you are finished. The changes are submitted, pending approval.

NOTE:

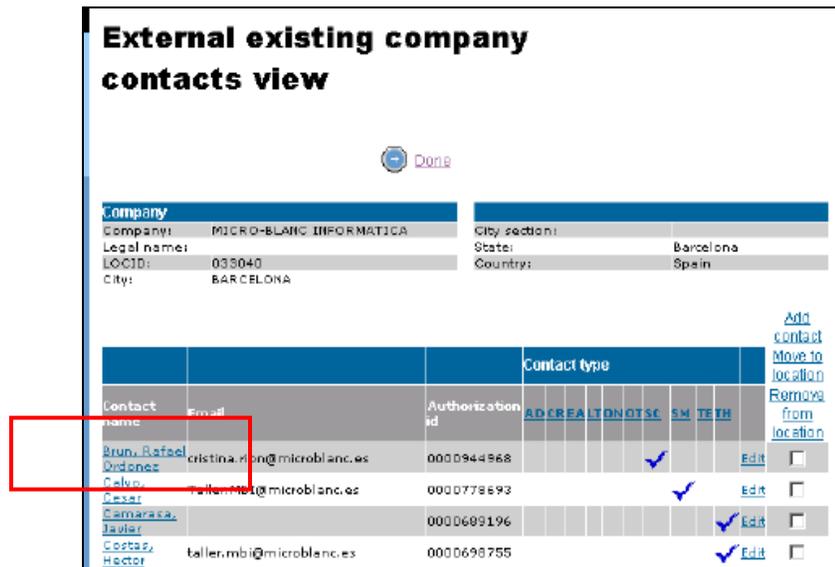
Your contact change request has been submitted and is pending approval for your Service Consultant. Please allow 3 business days and/or 72 hours.

5. Change the External Contact's Certifications

Step 1: Click the **View Associated Contacts** link.



The **External Existing Company Contacts View** page is displayed.



External Existing Company Contacts View page

Step 2: Click the **Contact Name** link for the contact you want to view.

Step 3: Scroll down to the **Certification** section of the page.

Step 4: You can either ADD or DELETE Certifications:

To ADD a Certificate:

1. Click the **Add Certification** link. The **External Contact Certification Association Edit** page is displayed
2. Complete the Certification information:
 - a. Click the **Certification** drop down list to select a certification
 - b. Enter the **Certification number**, **Date Taken (M/D/YY)** and **Expiration Date (M/D/YY)** if appropriate
3. Click **Submit**.

You are returned to the **Contact View** page.

To DELETE a Certificate:

1. Click the **Delete** checkbox beside the Certification you want to delete
2. Click the **Delete** link found at the top of the column. The **Contact Certification Association** page is displayed.
3. Click the **Delete** link.
4. Click the **Disassociate** link.

Step 5: Click **Update** or **Submit**.

NOTE:

The links you see will depend on your **User Privileges**. You may not find the **Disassociate** link. Changes made are submitted and pending approval.

NOTE:

A **Notifier** will be sent to your **Service Consultant** as a change request. Please allow 3 business days and or 72 hours.

6. Change the Contact's Privileges

Step 1: Click the **View Associated Contacts** link.



The **External Existing Company Contacts View** page is displayed.

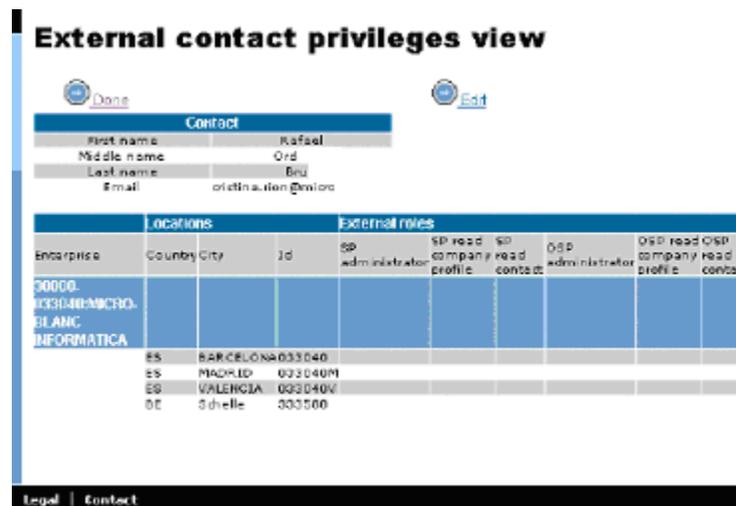
External existing company contacts view



External Existing Company Contacts View page

Step 2: Click the **Contact Name** link for the contact you want to view.

Step 3: Click the **View Privileges** link. The **External Contact Privileges View** page is displayed:



Contact Privileges View page

Step 4: Click the **Edit** link.

The **Contact Privileges Edit** page is displayed. Click **Update** when you finish your changes.

External contact privileges edit

Contact			
First name	Thierry		
Middle name			
Last name	Bou		
Email	TBO		

Enterprise	Locations			External roles					
	Country	City	Id	SP administrator	SP read company profile	SP read contact	OSP administrator	OSP read company profile	OSP read contact
0000-033040:MICRO-BLANC INFORMATICA									
	ES	BARCELONA	033	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	ES	MADRID	033	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	ES	VALENCIA	033	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	BE	Schelle	333	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

Step 5: Click **Done** to return to the **External Existing Company Contacts View** page.

Step 6: Click **Done** to return to the **Company Profile** page.

NOTE:

External Administrators can only give access to **Locations** to which they themselves have access. Therefore, if an administrator does not have access to an entire Enterprise, they cannot give access to the entire enterprise.

7. Resend a Contact's PIN

Step 1: Click the **View Associated Contacts** link.



The **External Existing Company Contacts View** page is displayed.

External existing company contacts view

[Data](#)

Company		City/region	
Company:	MICRO-BLANC	City/region:	
Legal name:		State:	Barcelona
LOCID:	033	Country:	Spain
City:	BARCELONA		

Contact name	Email	Authorization id	Contact type				Add contact	Move to location	Remove from location
			ADDRESS	PHONE	SM	TEXT			
Bruno Rafael Ordóñez	bruno.ordonez@micro	00009			✓		Edit	<input type="checkbox"/>	
Ceballos	TallerMB@micro	00007				✓	Edit	<input type="checkbox"/>	
Comarasa		00006					✓ Edit	<input type="checkbox"/>	
Cortés							✓ Edit	<input type="checkbox"/>	
Hector	hallermb@micro	00006					✓ Edit	<input type="checkbox"/>	

External Existing Company Contacts View page

Step 2: Click the **Contact Name** link for the contact you want to view.

The External Contact View page is displayed

External contact view

Reference id: 312187

Authorization id: 0000944968

↓ Authorization id

↓ Certificate

↓ Active to service

↓ Companies

↓ Course info

[Change contact information](#)

[View pdf pages](#)

Contact information

Name		Title/Email	
First name	Rafael	Job title	
Middle name	Ord	Email	crzbn.razon@micr
Last name	Brun	Work phone #	
Title		Service manager/Admin	MicroBlanc.valend
COMPETENCE		em.aid	Twitter:RafB@micr

Help center	
Help center access	

Geography	
Geography	Europe, Middle East
Country	Spain
Language	

Authorizations id

Authorization id	00009
PIN	****

[Resend](#)

*Available in english only

Top ↑

[Add certification](#)

Certification type	VN	Certification number
--------------------	----	----------------------

Top ↑

Brand	Active to service
Network Pkt	✓
Netlists	✓
Consumer	✓
PC Server	✓
Desktop	✓
Feature/Option	✓
Virtual/Monitor	✓
Netlinker / PC Server	✓
CDT	✓
Consumer DT	✓
Options by IBM	✓
Netlinker Servers	✓
ThinkPad - Dismantle	✓
POS	✓
DRT	✓
Monitor / Display	✓
Mobile	✓

Top ↑

Company associations		Contact type					Add						
BPEID	Company name	City/State location*	AD	FE	AL	DN	OT	SC	SH	TE	TR	discontinue	
000010	MICROSOFT		✓								✓	add	<input type="checkbox"/>

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

Top ↑

Active courses				
Course number	Course title	Date taken	Expiration date	
1 none RD102	IBM Netlists Service Training	6/19/02		

Expired courses				
Course number	Course title	Date taken	Expiration date	
1 none YR000	IBM Warranty Authorization	10/24/02		
2 none RE101	IBM eServer xSeries Entry Systems - Effective Problem Determination and Resolution	6/19/02		
3 none RE120	IBM eServer xSeries Advanced Systems Problem Determination	6/19/02		

[Home](#) | [Contact](#)

Step 3: Scroll down to the **Authorization ID** section of the page and click the **Resend** * link.

External contact view

Reference id: 312107
Authorization id: 000

↓ Authorization id ↓ Certification
↓ Active to service ↓ Companies
↓ Course info

[Change contact information](#) [View publications](#)

Contact information		Title/Email	
Name		Job title	
First name	Rafael	Email	crisnavalon@micro
Middle name	Ord	Work phone #	
Last name	Bon	Service manager/Admin	Microblanc.valencia@micro
Title		email	Taller.MB1@micro
COMPTRIA #			

Help center
Help center access

Geography
Geography: Europe, Middle East and Asia
Country: Spain
Language:

Authorization id	
Authorization id	000094
PIN	****

[Resend*](#)

*Available in english only

The **Resend PIN** page is displayed.

Resend PIN

[Resend](#) [Resend](#)

Authorization id	
Authorization id	000094
PIN	****

Step 4: Click the **Resend** link to send the PIN to the Email address listed for the contact. The **Contacts View** page is displayed.

NOTE:

An email message with the confidential required information is sent to designate.