



IBM Software

Vision2011

The Premier Event for Financial Management

See Beyond

WELCOME TO IBM



Key Dates



May 1 (Transfer of Business)

Clarity Support Business as Usual

- ☎ Call us toll free at 877-410-5070
- ✉ Email support request
- 🔑 Login to customer care

Clarity Training New Registration Process

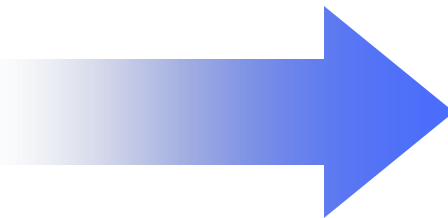
www.ibm.com/training

Clarity S&S (Renewals)

IBM Processes & Systems

<http://www.claritysystems.com/us/Services/Pages/CustomerSupport.aspx>

August 31



Support Moves to IBM



IBM Terminology



IBM Customer Number (ICN)

Subscription & Support (S&S)

Proof of Entitlement (POE)

IBM Part Numbers

Primary Contact

**Site Technical Contact or
Primary Technical Contact**



IBM Contacts



Primary Contact (e.g., System Administrator)

- Receives physical delivery and manages access to the IBM software download site
- Approves IBM Download Site access requests from other company employees
- Receives all account management and download instruction communications
- Receives support maintenance renewal quotes and invoices

Site Technical Contact (STC) aka (**Primary Technical Contact**)

- Manages access to IBM Technical Support services, including assisted support
- Approves IBM Technical Support site access requests from other company employees
- Receives all IBM Technical Support access instructions and communications





Transfer of Business Letter & DBWI

- Sent to Primary Contact in early April
- Now available for download

http://www.claritysystems.com/us/resources/Pages/Customers_DBWI.aspx

Doing Business with IBM **A Guide for Clarity Systems Customers - Worldwide**



On October 21, 2010, IBM completed the acquisition of Clarity Systems, a leader in automating the disclosure management lifecycle and creation of filings (XBRL) and high-value documents. This document includes important information about the integration of Clarity Systems into IBM on May 1, 2011.

Since your organization has purchased products, licensed software solutions, contracted services or has a customer support agreement with Clarity Systems, we would like to provide information that will guide you in conducting business with IBM. Although some processes are changing, most of your contacts in sales, service delivery, support and education remain the same.



Automated Emails



Proof of Entitlement Email

Welcome to IBM Email

**Welcome to IBM's
Electronic SR System Email**

**Welcome to
Software & Services Tool Email**





Proof of Entitlement Email

Email subject line	What's in it	Why it's important	What you should do with it
IBM Software Proof of Entitlement Notification	<ul style="list-style-type: none">- Provides your IBM Customer Numbers (ICN)- Sent to Primary Business Contacts and Primary Technical Contacts- Includes a .pdf attachment	The .pdf attachment includes your new IBM Customer Number assigned to each Clarity entitlement. ICNs will be required for future access to support as well as product downloads, etc.	<ul style="list-style-type: none">• Open the .pdf and make a record of the product and the ICN associated with it.





Welcome to IBM Email

Welcome to IBM	Welcome to IBM notification	This email includes your software site number and IBM Customer Number (ICN)	File your software site number, ICN and software agreement number for future reference
	Sent to Primary Business Contacts		Follow the links and instructions in the email to set up your access to the Software and Services tool (used for product downloads)

Welcome to IBM's Electronic SR System Email

Welcome to IBM's Electronic Service Request System	Automatic email from the IBM on-line service request management tool, called the ESR, or Electronic Service Request system Includes personalized url	It provides the information you need to prepare for the service request management transition that is planned for later this year .	Follow the links and instructions in the e-mail Set up your contacts Share your ICN with these contacts to prepare for the service request management transition planned for later this year . Note: Do NOT use the ESR as your service request management tool at this time. Clarity Systems Support Requests should still be logged (using your existing Clarity customer number): on-line via Clarity Customer Care Portal or by phone using the same Clarity Support phone number (1-877-410-5070).
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Welcome to Software & Services Tool Email

IBM Welcomes you to Software and services tool	Automatic email generated when your Clarity product entitlement(s) is loaded into IBM systems	You will need to follow the instructions in the email to gain access to the IBM product download website.	Follow the links and instructions in the e-mail
	Sent to Primary Technical Contacts		Watch your mail for the hard copy Welcome letter containing your IBM temporary pass code
	Includes personalized url		You will then have full access to the Software and Services Tool (read more on this tool)
			All existing IBM Clarity software customers as well as partners providing support services should continue to use the IBM Clarity Support website to access entitled current product downloads and back-level releases.



Getting Started on IBM.com



<http://www.ibm.com/clarity-systems/support/>

Business Analytics

Products

Industry Solutions

Events

Library

Related links

- Business Analytics and Optimization
- Cognos
- SPSS
- Clarity Systems
- OpenPages
- Coremetrics
- iLog
- Information Management
- Smarter Planet

Clarity Systems Customer Center

Your starting point for the offerings and resources you need to optimize business performance.

Software Support

Training

Support resources for Clarity customers as we transition to IBM Support.

- [Clarity Systems, an IBM Company](#)
- [Customer Support for Clarity Systems](#)
- [Doing Business with IBM](#)

Contact Clarity Systems Customer Support

- Call 877-410-5070
- [Email Clarity Systems support](#)
- [Log into Clarity Systems customer care](#)

Events

Vision Conference 2011

May 15th to 18th, 2011 - Dallas, Texas

The premier conference dedicated to excellence in financial governance and performance management.

- [More information](#)

Contact Business Analytics Customer Support

Support contact information for your Business Analytics products.

- [Clarity Systems](#)
- [Cognos](#)
- [OpenPages](#)
- [SPSS](#)





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IBM Clarity Systems Support



Business as Usual



Email:

support@claritysystems.com

Call:

1-877-410-5070

Login in to customer care:

<http://www.claritysystems.com/us/Services/Pages/CustomerSupport.aspx>





Create Your IBM Web ID NOW!

Step 1:

Start registration process through
<https://www.ibm.com/account/profile>

Step 2:

Enter your IBM ID, password and security fields

– We recommend:

Using your existing Clarity log-in email address as your IBM ID, as this will help to avoid future issues with product downloads

Note: You will be prompted to associate your IBM Customer Number (ICN) to your IBM ID once you start using the Service Request Tool

Step 3:

Save IBM ID information





IBM Software

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IBM Clarity Systems Support Maintenance





What's Different?

- Renewals between IBM and customer organization
- Clarity renewals were handled from Toronto location by Finance Team....now....
- >> Clarity renewals will be handled at regional level by regional IBM Software Group renewal teams
- >> Every customer will have a renewal sales representative assigned to their account
- Clarity customers will now receive a quote 60 – 90 days prior to renewal date; followed up by contact from the renewal rep
- IBM requires firm order before invoice is generated
- Co-termed to end of month




INVOICE

 Invoice Number: IN-09439
 Invoice Date: 02/17/11
 Page: 1

Bill To:
 Clarity Customer
 Address ABC

Ship To:
 Clarity Customer
 Address ABC

Ship Via Electronic Download
Due Date 03/19/11
Terms Net 30 days

Customer ID Clarity Customer #
Job No.
P.O. Number

Description	Quantity	Unit	Unit Price	Total Price
Annual Maintenance Renewal				
03/31/2011-03/30/2012				
Reference Original Invoice IN 0000	1	Each	27,000.00	27,000.00
Amount Subject To Tax				27,000.00
Sales Tax Breakdown:			Subtotal:	27,000.00
	Pennsylvania - Pht	2,160.00	Total Sales Tax:	2,160.00
			TOTAL (USD):	29,160.00

 Wire funds to:
 Clarity USA
 TD Bank, New York Branch
 31 West 52nd Street New York, NY 10019-6101
 Bank Transif#: 026003243
 Bank account #: 03248122953

 Direct any inquiries to the attention of:
 Para Pedro
 (415) 250-5500 ext 298
 ppadro@ca.ibm.com

 The check should be made payable to:
 Clarity USA Inc
 #8125 - 234 Hudson Avenue
 Albany, NY 12210

Clarity Invoices:

- No quote
- Invoice sent out ~30 days prior to renewal date
- Single line with single price referencing Original Invoice or previous year's Maintenance Renewal invoice
- Includes Renewal Period



IBM

- BILL TO** The address where the invoice will be sent to
- SHIP TO** Where the product was shipped to
- IBM#** Look for your company's new ICN (IBM Customer Number). Use this number for service inquiries
- DOCUMENT NO.** Use this number for billing inquiries
- DOCUMENT DATE** Date invoice is created
- PO** Customer P0
- PAYMENT TERMS** When your payment is due
- QUANTITY SHIPPED** Number of items shipped
- PART NUMBER** Note: not on Cognos invoice
- DESCRIPTION** Description of items purchased
- UNIT PRICE** Cost per unit
- AMOUNT** Total amount for that item
- MAIL CHECK OR MONEY ORDER PAYMENT TO** Where you should send your payment
- REMIT ELECTRONIC WIRE TRANSFER TO** Remittance instructions for electronic or Wire transfers

International Business Machines Corporation

Ship To / IBM #: 7941608 / 3100135

2 MICHELLE VESSEY
Ameriprise Financial Services Inc.
2800 Ameriprise Financial Center
MINNEAPOLIS, MN 55474
UNITED STATES

Bill To **1** #: 7941608 / 3100135

MICHELLE VESSEY
Ameriprise Financial Services Inc.
2800 Ameriprise Financial Center
MINNEAPOLIS, MN 55474
UNITED STATES

Invoice



4 Document No:
5 Document Date:
6 I.O. No:
7 Payment Terms: late payment may apply

91657459
09-Apr-2008
DG1014037 REBIL
Net Due Upon Rece

IBM Contact:
Phone:
INCO Terms:
Shipping Date:
Ship Via:
Sales Order No:

IBM Accounts Rece
877-426-6006
FOB Shipping Point
09-Apr-2008
Airborne
52370406

Item	Quantity Shipped	Part Number	Description	Unit Price
10	45,000	E03EYLL	IBM FILENET CONTENT MANAGER ELA EMPLOYEE ANNUAL SW S&S RNWL Start date: 01-Jul-2007 End date: 30-Jun-2008	10.12
40	10	E03BCLL	IBM FileNet Bus Process Manager FileNet Expansion Named User Annual SW Subscription & Support Renewal Start date: 01-Jul-2007 End date: 30-Jun-2008	31.00
70	20	E03GNLL	IBM FILENET RECORDS MANAGER EXP CONC USER ANNUAL SW S&S RNWL Start date: 01-Jul-2007 End date: 30-Jun-2008	82.00
100	2	E03DKLL	IBM FILENET CAPTURE PROF-LOW VOL DEVICE ANNUAL SW S&S RNWL Start date: 01-Jul-2007 End date: 30-Jun-2008	236.00

Sold-To-Party / IBM #: 7941608 / 3100135
Ameriprise Financial Services Inc.

Mail check or money order payment to:
IBM Corporation
PO BOX 643600
PITTSBURGH, PA 15264-3600

Remit electronic wire transfer to:
IBM Corporation c/o PNC Bank
500 First Avenue
Pittsburgh, PA 15219
Bank Contact: Donna Haber
ABA No.: 043000096
Account #: 1017305737
Swift Code: PNCCUS33

International Business Machines Corporation, PO Box 643600, Pittsburgh, PA 15264-3600

IBM Quotes & Invoices:

- Customer now receives quote 60 - 90 days prior to renewal date
- Breaks renewal down to product license (part numbers) level with associated prices
- Includes New IBM Customer Number (ICN) and renewal period
- Firm order will be required prior to issuance of invoice
- Renewals done by regional renewal sales teams





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IBM Clarity Systems Training





What You Need to Know About Customer Education

As of May 1, 2011:

- IBM Clarity Systems training, certification, course search and registration have moved to IBM systems and processes
- To register for an IBM Clarity Systems course in the IBM online registration system you will need your new IBM Customer Number (ICN)
- Clarity Systems courses will continue to be delivered by Clarity Systems authorized instructors and consultants
- Prepaid training will be honored by IBM until its expiration date





Course Search & Registration

Search Tips

- Start at www.ibm.com/training
- Choose “Training Worldwide” or “Browse for Training by Country”
- Select your country in the drop-down list
- Select “Business Analytics” in the search results
- On the Business Analytics page, select “Clarity”

The screenshot shows the IBM Training website interface. On the left, a navigation menu is visible with the following items: Training, Training worldwide, IBM Education Pack, Certification, and Conferences & events. The 'Training worldwide' item is circled in purple. Below the menu is a 'Related links' section with a list of links including IBM Systems Training, IBM Systems Technical University Series, IBM Systems Lab Services, IBM Software Services, IBM Software Training, IBM Business Partners, and IBM Publications.

The main content area is titled 'IBM Training' and includes the subtitle 'Classroom, e-learning and technical conferences'. Below this is a section for 'Training worldwide' with the tagline 'Enabling the adoption of IBM technology' and an image of a globe on a stand between two laptops.

Below the main content, there are three sections: 'Why IBM?' which states that IBM offers a comprehensive portfolio of technical training and education services; 'What we offer' which is divided into two columns. The left column is titled 'Training Worldwide' and contains three items: 'Training search - global' (circled in purple), 'Browse for training by country' (circled in purple), and 'Save money on training'. The right column is titled 'Training in the United States' and lists various training options like onsite training, software training, systems training, and a training finder tool.





- Training
- Course catalog
- Courses A - Z
- Courses by location
- Certification
- e-Learning
- Training search
- Training worldwide
- Conferences & events

Training > Course catalog >

Business Analytics training

Topics Certification Special offers, news and more

View the recommended order of our classes with training paths:
[Clarity](#), [Cognos](#), [OpenPages](#), [SPSS](#)

Choose a Business Analytics training category to view available courses, certification information, training paths, offers, and more.

- Clarity
- Cognos
- OpenPages
- SPSS

Quality instructors, materials, and hands-on labs: [Learn why customers keep coming back to IBM for training](#)

We can bring Business Analytics training to you: [Onsite training](#)

Featured Items

- IBM Education I
- Prepaid discount
- Team Training
- Build skills with complimentary your team!
- New and updated courses
- Subscribe to R



- Training
- Course catalog
- Courses A - Z
- Courses by location
- Certification
- e-Learning
- Training search
- Training worldwide
- Conferences & events

Training > Course catalog >

Clarity

View the recommended order of our classes: [Training paths](#)

Select a topic area below to see the associated courses.

- Clarity
- Financial Statement Reporting (FSR)

We can bring Clarity training to you: [Onsite training](#)

- Related links**
- IBM Business Partners
 - IBM Software Services
 - IBM Software Training
 - IBM STG Lab Services
 - IBM Systems Technical University Series
 - IBM Systems Training



Clarity Training Paths & Curriculum Fact Sheets



Training Paths show you the recommended sequence of courses to take to achieve specific competencies or certification preparation

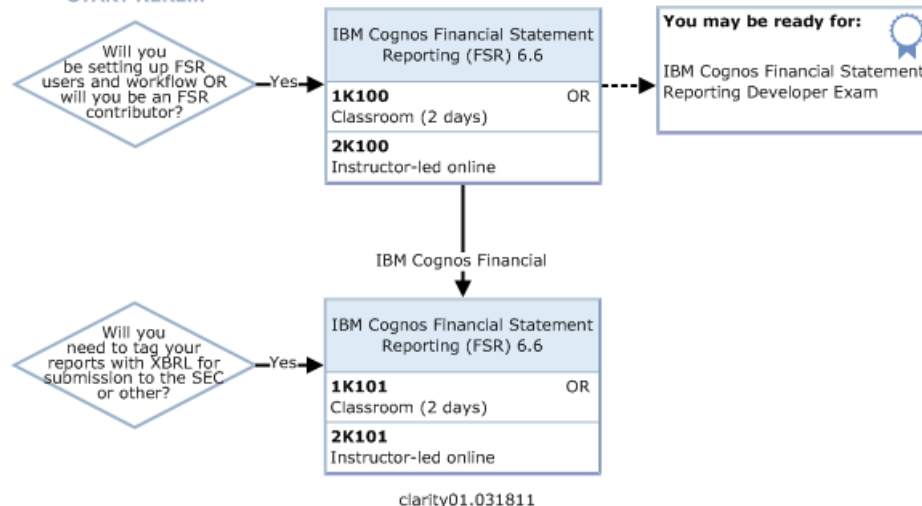
IBM Training > Clarity Training Paths and Curriculum Fact Sheets >

IBM Cognos Financial Statement Reporting (FSR) 6.6 – Administrator

Use this training path to see the courses you need to take to achieve this skill or certification. Click on the course boxes to access a course description, view its schedule, and enroll.

PDF version (26KB)

START HERE...





Coming Soon – IBM Cognos FSR Certification Exam



- Certification Benefits
 - Validation of market-relevant knowledge and skills
 - Peer recognition
 - Increased value to employers
 - Increased marketability

**IBM Certified
Developer - Cognos
Financial Statement
Reporting (COG-706)
available May 18**

www.ibm.com/certify





IBM Education Pack

A discount purchase program that gives your organization access to the top-notch classroom training, technical conferences and e-learning offerings that IBM is renowned for – at a very competitive price.

Reach your strategic skill-building goals while saving money

Make your move with the IBM Education Pack



- **Flexible** – Open an account for as little as \$1,000, add to it in \$100 increments, and train anybody in your company
- **Smart** – Lock in training dollars at up to 10% off now and train when you need it
- **Convenient** – Sign up for training online, any time. Simply log into your account and submit a voucher for the training.
- **Comprehensive** – Select from hundreds of training choices in multiple formats





If you remember 3 things, remember these

1. Business as usual for Clarity Support until August 31, 2011
2. There will be communications directed to the Primary Contact and Site Technical Contact – make sure they know that and you know who these people are
3. Renewals (S&S) and Training have some changes as of May 1, 2011
 - S&S: Quotes now & regional renewal reps
 - Training: Registration now via www.ibm.com/training or IBM phone numbers





Write These Down!

Clarity Customer Center

www.ibm.com/clarity-systems/support/

Questions? Email

Clarity.Renewals@ca.ibm.com

