

# Doing Business With IBM

A guide for StoredIQ OEM/ASL partners in North America



## *Welcome to IBM!*

On February 7, 2013, IBM announced completion of the acquisition of StoredIQ. The acquisition advances IBM's efforts to help clients derive value from big data, respond more efficiently to litigation and regulations, and dispose of information in an automated way that has outlived its purpose. Beginning January 1, 2014, StoredIQ will be conducting business as IBM.

The following "Doing Business with IBM" guide describes changes to expect and actions needed to maximize the benefits of your relationship with IBM. It will also help to ensure a smooth transition to IBM's business systems and processes. Most of your contacts in sales, service delivery and support will remain the same.

We anticipate that you and your organization will experience a smooth transition to IBM over the next several months. During this process, the IBM team and your IBM StoredIQ representatives are available to answer any questions and to address your ongoing software and service needs.

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## 1. Important actions for StoredIQ partners

### ***Create an IBM profile***

***Your company's Primary Contact will need to create an IBM profile***

With an IBM profile, you can view, update or add personal contact details, job title or registration settings.

Create or update your IBM profile here: <https://www.ibm.com/account/profile/us>

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### ***Create an IBM Registration***

***Your company's Primary Contact will need to create an IBM Registration***

Your IBM Registration ID, also known as an IBM ID, is your single point of access to IBM web applications that use IBM Registration.

You need just one IBM ID and one password to access any IBM Registration based application.

Create or update your IBM Registration here: <https://www.ibm.com/account/profile/us?page=reg>

*Please note there may be a delay of up to 15 minutes before you will be able to use your new IBM ID.*

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### ***Need assistance?***

For additional information and guidance on setting up your IBM profile and IBM Registration ID, consult our FAQ page here: <https://www.ibm.com/account/profile/us?page=faqhelp>

Alternatively, you may contact the Worldwide IBM Registration Helpdesk at the following link: <https://www.ibm.com/account/profile/us?page=helpdesk>

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## 2. Accounts Payable and Purchasing

Effective January 1, 2014, StoredIQ accounts payable and purchasing processes will migrate to IBM.

### *Important changes in Accounts Payable and Purchasing*

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#### **Tax ID Exemption Certificates and Change Requirements**

Vendor applicable Tax Identification Number will change.

If you are currently exempt from Sales and Use tax, or local VAT, you will need to issue your company's Tax Exemption Certificates to IBM with your first order after January 1, 2014. IBM's tax forms can be found here: <http://www-03.ibm.com/procurement/proweb.nsf/contentdocsbytitle/United+States~Tax+forms>.

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#### **Vendor name**

Vendor name will change from StoredIQ to the applicable local/regional IBM operation covering your location (the term "Vendor" below represents the applicable IBM entity).

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#### **Vendor remit-to addresses**

Vendor remit-to addresses for checks, wire transfers and overnight payments will change for all new business after January 1, 2014.

The new details will appear on your invoices issued from IBM after that date.

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#### **Vendor standard payment terms**

In most countries, Vendor standard payment terms of "due upon receipt" may be applicable. You can find this information on either your invoice or quote.

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#### **Currency**

In some countries, the currencies used by StoredIQ are different than those used by IBM, thus you may be transacting in a different currency with IBM.

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#### **Languages**

In some countries, the correspondence you will receive from IBM may be in the local language.

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**Customer numbers**

Effective January 1, 2014, StoredIQ customers will be assigned an IBM Customer Number (ICN). You will receive your IBM Customer Number in January, 2014. See section 7 (“Additional Information”) for more information.

Please note that your ICN will be used with all order-related communications

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**Purchase documentation**

All purchase documentation, such as invoices, will be sent to the contact(s) listed in the IBM profile associated with your ICN unless specified otherwise in your order

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**Part numbers and product descriptions**

New part numbers and product descriptions for the IBM StoredIQ portfolio will replace the pre-existing StoredIQ product descriptions.

These new part numbers and descriptions will appear on quotes and invoices you may receive from IBM. See section 7 (“Additional Information”) for more information.

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**Document formats**

The format of documents (quotes, services statements of work, invoices, etc.) you receive will change in format after January 1, 2014, and they will be issued from an IBM location as appropriate. This may affect the remit-to address, and in certain countries, the transaction currency that you are using today.

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**PO requirements**

If your company requires issuing a purchase order (PO) to facilitate payment for goods or services, IBM may require a new PO. Contact your StoredIQ representative with any questions.

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**New licensing process**

IBM StoredIQ offerings are governed by license agreements which can be found here: <http://www-03.ibm.com/software/sla/sladb.nsf/search/>.

*Note: your legacy contract continues to apply to your existing software until such time as you move to the IBM license agreement*

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**Migration to new pricing metrics**

Coming into IBM, your product entitlements will be moved to IBM systems. At that time, your sales representative will be available to explain your entitlement grant as well as answer any questions about the charge metrics of the offerings.

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## 3. Software Support

Note: This section is for those entitled to StoredIQ support.

StoredIQ Support offerings will continue to be used after January 1, 2014 and supported by the IBM StoredIQ Support team. The IBM StoredIQ Support team will continue to focus on delivering customer satisfaction without compromise.

As we work to integrate StoredIQ and IBM Support, we will offer IBM StoredIQ customers expanded capabilities through the existing IBM Support infrastructure. For the most current information on the IBM StoredIQ Technical Support transition, visit the StoredIQ Technical Support page at <http://www-01.ibm.com/software/ecm/storediq/support/> for the latest updates. This site is also an excellent source of information for those new to IBM Support.

IBM does not anticipate changes until late in the 1<sup>st</sup> half of 2014.

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### What does not change on January 1, 2014

Support is provided per your existing StoredIQ Support agreements. Continue to contact support through the existing channels (call toll free at (886) 227-2068 or send an email to [storediqsupport@us.ibm.com](mailto:storediqsupport@us.ibm.com)). Continue to use your official customer name

*Note: Please visit the following page for updates to this support:*  
<http://www-01.ibm.com/software/ecm/storediq/support/>

As part of the transition into IBM Support, StoredIQ will be contacting you to validate the correct Primary and Site Technical Contacts

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*Below are informational highlights to help you understand the definition of those future roles in IBM Customer Support.*

## **Primary Contact**

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The **Primary Contact** is a specific individual who will manage access to the IBM Download Site for their organization's IBM StoredIQ software contract(s). The Primary Contact approves IBM Download Site access requests from their organization and will receive all download account management and communications. This person will also be the primary contact for annual support renewal invoices for IBM StoredIQ software and services at your organization.

Additionally (if you are entitled to support), the Primary Contact will manage access to IBM's Technical Support services and grant the authority to open Technical Support Requests on behalf of their organization. The Site Technical Contact approves IBM Support access requests from their organization's employees and business partners and will receive all IBM Support access instructions and communications. More information regarding IBM Electronic Support can be found at <http://www-01.ibm.com/support/electronicssupport/workwithibm.html>

Only a **single** Primary Contact can be designated per company in the IBM systems.

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## **4. Software Subscription and Support Renewals**

StoredIQ Software Subscription and Renewals will be integrated into the IBM Software Subscription and Support Renewals process through submission of royalty reports. Your Software Subscription and Support Renewal should be submitted on your usual submission schedule. A reporting template will be provided to you.

## 5. Privacy Policy

As part of the acquisition, personal information may be transferred from StoredIQ to IBM. IBM's privacy policy may be viewed online at <http://www.ibm.com/privacy>.

## 6. Royalty Report Attachment

**Royalty Reports** should be sent to a new address:

North America: Fax: 845-491-2779 or electronically to: [ibmoemsw@us.ibm.com](mailto:ibmoemsw@us.ibm.com)

**Note:** You will receive the new royalty report template, with new part numbers to use, in early January 2014. See section 7 (“Additional Information”) for more information.

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### Report Format

IBM will provide a standard royalty report for use in royalty reporting. The report may be altered from time to time, and will be available from your Partner Manager (PM).

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### Frequency

Effective January 1, 2014, OEM and ASL partners will be required to submit a royalty report to IBM once per month (or as per contract). Reports should be sent three days prior to the last working day of the month.

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### Invoicing

With the Transfer of Business to IBM as of January 1, 2014, the process for invoicing will change. IBM will be sending an invoice in the mail (post) to your billing address. This is the address that we verified with you in the last two months and the one that is written in your contract. IBM will not be sending invoices via email so please ensure you put in place the necessary controls to receive and pay the invoices promptly.

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## **Completing a Royalty Report**

For each tab:

Ensure your Company information is fully completed at the top of each tab including the relevant IBM Customer Number (ICN) and related Site Number which is provided to you within the document. Enter the corresponding royalty report period month and year for 'Royalties for the month of:' (e.g. May, 2014)

Contact your local partner manager with any questions.

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## **IBM Parts**

Effective January 1, 2014, IBM will have created new part numbers that you will need to use. All orders must be submitted using an IBM part number (not StoredIQ part names and numbers). These part numbers, along with an appropriate description of each part, can be found in the product list that will be attached to the royalty report template in an email that you will receive.

In the past, if you have been accustomed to StoredIQ part names and numbers, these have now changed as StoredIQ has completed the integration into IBM. You must be careful to know which IBM part replaces the past StoredIQ part. Instructions on how to use the IBM parts within your royalty report will be given when you receive the royalty report template. See section 7 ("Additional Information") for more information.

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## **Submission Address**

Royalty reports should be submitted in Microsoft Excel format, or in the format provided to you by IBM, and emailed to the following email address:

North America: [ibmoemsw@us.ibm.com](mailto:ibmoemsw@us.ibm.com)

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## Remit Addresses

Once StoredIQ transfers business into IBM, your contracts will be managed by IBM. Please ensure you update all your records to indicate the correct remit to address for payments to IBM.

**Please remit all check or money order payments referencing your ICN and Site Number to:**

PNC BANK  
PO Box 643600  
LOCKBOX IBM # 643600  
500 FIRST AVENUE  
PITTSBURGH, PA 15219

**Please remit any electronic wire transfers to:**

IBM Corporation c/o PNC Bank  
500 First Avenue  
Pittsburgh, PA 15219  
800-762-4224

Acct #: 1017305737  
ABA Routing #: 043000096  
Tax ID #: 13-0871985  
SWIFT CODE: PNCCUS33

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## Credit

For each IBM business partner transacting directly with IBM (Tier 1 relationship), credit assessment is one component of the order management process. While in the majority of cases the credit assessment is a function of publically available data, absent this, it is likely that financial statements will be requested with which to evaluate credit worthiness. Such a request would typically be for the prior two year's audited income statement and balance sheet.

It is possible – although rare – that transacting directly with IBM could be done only on a cash basis (payment at time of order) or with inclusion of a bank guarantee.

Purchase credit is granted commensurate with expected, near term revenue generation and is influenced by historical revenue, payment history, and your company's size and financial strength. Also, payment terms called out in your StoredIQ contract will be honored by IBM as long as the contact is active.

Finally, using the sales forecast, the credit assessment can take place well before submission of the actual software order. Your IBM partner representative will manage this process inside of IBM.

In addition to purchase credit, IBM Global Finance offers other programs that may be applicable, such as credit lines and end user financing. If interested, the next step would be to alert your IBM partner representative.

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## ***7. Additional Information***

Please note that important additional information will be communicated to you in January, 2014. This information is vital, as it give you the ability to submit royalty reports. This information will include:

- Your IBM Customer Number
- Site Number
- The IBM royalty reporting spreadsheet
- Instructions on how to use the IBM royalty reporting spreadsheet
- The new IBM part numbers that you will need to use for the royalty reporting spreadsheet

This information will be sent electronically to your Primary Contact of record.