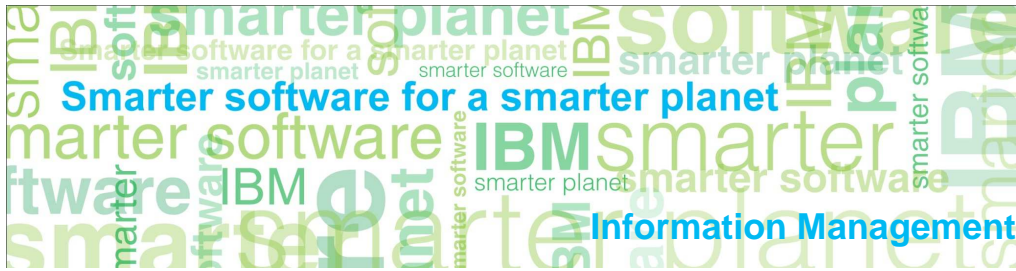


IBM Initiate - Changes to Customer Support



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This presentation is intended to describe some of the changes to terms and methodology of software support, as Initiate fully integrates with IBM over the coming months. The presentation is of most interest to existing Initiate customers, both the Exchange and the Master Data Management product ranges.

Comparison table: Support changes

INITIATE	IBM INITIATE
ATSC (Authorized Technical Support Contacts) Primary, Technical, User	PSTC/SSTC (Primary and Secondary Site Technical Contacts), Authorized Users, Authorized Readers
Customer Service Center website	IBM Support Portal
Information centers (browser-based documentation)	(unchanged)
Online Case Management tool	Online SR (Service Request) tool
Case Solutions and Knowledge Base	Technotes and KCS (knowledge-centered support) system
Customer Forums	IBM developerWorks
Support Case	SR (Service Request), PMR (Problem Management Report)
Defect or Feature Request	APAR (Authorized Program Analysis Report)
Support cases entered by way of web interface only 24x7 on call for Premium customers only	PMRs can be submitted by way of web, or by calling IBM support to submit PMR on your behalf (24x7 for all customers)
"Basic" and "Premium" support plans	One support plan and SLA for all customers
Legacy documentation in PDF form, new releases have web-enabled docs	Web-enabled docs for all documentation, new and legacy
Contact Customer Service to receive patches and software releases	"Fix Central" – complete online patch and release download area, available 24x7

This slide displays a table showing some of the differences. Many things are conceptually the same in the IBM world, they just have a different name. For example, Initiate used the term ATSC, or Authorized Technical Support Contact, to describe customer representatives with access to the Initiate support website. At IBM, these individuals are known as Primary and Secondary Site Technical Contacts. IBM Initiate also allows a virtually unlimited number of representatives to sign up for web IDs on the IBM Support Portal, versus the contractually-limited number of ATSC accounts available previously. However, we do strongly encourage customers to designate a small number of knowledgeable contacts to interface with our Support team. We will have more on that later.

Support website names will change from the Initiate Customer Service Center to the IBM Support Portal. Support Cases are known as PMRs (or Problem Management Requests). Defects and Feature Requests are known as APARs (or Authorized Program Analysis Reports), and the action of requesting assistance is known as a Service Request, or SR. Thus, you will login to the IBM Support Portal and use the SR Tool to submit a PMR, which may or may not become an APAR.

The Support Portal is available 24x7 and IBM has several different telephone support teams which allow you to contact an IBM representative for assistance with just about anything from the Support Portal to licensing and entitlement questions. Furthermore, you will now be able to call a support hotline at any time in an emergency situation. For example, if you do not have access to the internet at your location or you have a problem with the website such as forgotten your password. The representative will validate your IBM Customer Number, clarify the product you are calling for support on (we refer to these as Components) and finally submit a PMR on your behalf at an appropriate severity level. A technical representative will then contact you to commence the support process.

IBM uses the same Support Plan for all distributed platform customers which is described on the next slide. This replaces the Initiate Basic and Premium support plans, and uses a four-level severity scale instead of five.

Starting from version 8.1, Initiate software documentation has been contained in online information centers which allow you to search through all documents in one go, rather than PDF by PDF. IBM's documentation framework uses exactly the same technology, so there will be no changes here.

Finally, IBM has a standard online location known as Fix Central from which customers can securely download patches and pre 9.5 software versions. New releases will be available through the Passport Advantage site.

General FAQs (1 of 2)

Q: How do we submit a support case?

A: The new Support Portal allows the submission of a Service Request, similar to before. Help Desk numbers are at <http://www.ibm.com/planetwide>.

Q: Who can submit SRs?

A: You may now have an *unlimited* number of authorized representatives from your site who can either submit SRs or else be restricted to viewing existing SRs only.

Q: What are the IBM Support SLAs?

A: The Distributed Platform Response Objectives are: Severity 1 (critical) = 2 hour response, Severities 2 (significant impact), 3 (some impact) and 4 (minimal impact) = 2 *business* hours.

This slide contains some questions which you may have as an IBM Initiate customer.

Submission of a support case is by way of a web tool, the same as before. You can create an IBM web ID at any time, and then login to www.ibm.com/support and use the Service Request tool to submit an SR. Alternatively, you can call an IBM Helpdesk in your country to have an SR submitted on your behalf. More information can be found at www.ibm.com/planetwide.

Once registered and approved, SRs can be submitted by Primary and Secondary Site Technical Contacts, of which there is typically one of each at a customer's site. Technical Contacts and Authorized Users may submit SRs as well. There is also an "Authorized Reader" permission level. These accounts are able to view PMRs and receive notifications of updates, but may not submit or modify them online.

IBM's Support SLAs are based on a 4-level severity scale. Severity 1 represents critical issues and is responded to within 2 hours, 24x7, seven days a week. Severities 2, 3 and 4 are responded to within 2 business hours.

General FAQs (2 of 2)

Q: Can we still get a representative on the telephone for emergencies?

A: IBM Representatives are available 24x7 to assist with the submission of Service Requests or for help with any aspect of your support agreement or the online portal.

Q: Am I able to download software and patches from IBM?

A: Yes, Fix Central and your Passport Advantage agreement allows 24x7 access to releases.

Q: What is developerWorks?

A: developerWorks is a web-based professional network and technical resource for millions of developers, IT professionals, and students worldwide, available 24x7.

You have the option to call IBM Support rather than enter an SR. While the IBM representatives who answer the phones will not be able to assist you with actual technical support on your Initiate product, they will take down your details. They then coordinate the submission of a PMR and a technical support representative will call you back within the appropriate SLA timeframe.

You can download software and patches from IBM's Fix Central website at any time. Access to code is based upon your software entitlement license.

developerWorks is a comprehensive online resource which allows developers, IT professionals and students to collaborate. We are sure that you will find developerWorks invaluable as you discover more about IBM's software and hardware potential.

Exchange customers: FAQs

Q: Will we still be able to speak to a support representative on the phone?

A: Yes. Representatives are available 24x7 to submit a Service Request on your behalf. Provision of support by way of the telephone is possibly only after the submission of a SR.

Q: What is the difference between Primary Locations and Subscribers (for example a doctor's office)?

A: Representatives from Primary Locations will have access to the online SR tool. Subscriber locations are still eligible for proactive contact from IBM but will be unable to submit SRs online unless granted permission by an administrative user from their primary site.

Q: Will the Dashboard and other technologies remain the same?

A: At this time we have no plans to retire or change any Exchange infrastructure.

Q: Will support staff processes remain the same (proactive assistance etc)?

A: Exchange support will remain the same. We will continue proactively monitoring the system and contacting customers as necessary, in addition to troubleshooting on-demand customer issues.

This slide displays some questions that you may have if you are a customer with a license for IBM Initiate Exchange, our wide-area integration platform for creating health information exchanges.

While IBM operates a helpdesk that will assist you in the submission of a PMR, we do not provide technical support over the telephone during this initial contact. However, after a PMR is received you will be contacted by a technical support representative from the correct division within IBM, by way of telephone or email, as troubleshooting commences.

Primary Locations (for example, labs and hospitals) will have access to the IBM Support Portal, and will have the capability to submit and view Service Requests online. Subscriber locations (for example, physicians' practices) will instead need to contact their Primary Location site for assistance. IBM will, however, provide proactive support in critical situations since we are responsible for monitoring the throughput of messages from a primary location, through our datacenter and on to the subscriber endpoint.

We do not plan to make any significant changes to the Exchange Dashboard at this time. If you currently have access to this portal you should not notice anything different graphically or operationally.

All proactive and reactive Exchange support will remain the same. We will continue monitoring our system and advising you proactively of issues, and continue to accept and handle submitted Service Requests from Primary Sites.

Master Data Service: FAQs

Q: Will remote access to our site remain the same?

A: IBM have strict policies regarding access of protected customer information. Initiate is in the process of integrating the existing practices into the IBM framework and will have more information for customers on this topic at a later date.

Q: Are the SLAs and “case severities” still the same?

A: No. There are now four severity levels and different target response times. These are detailed in the IBM Support Handbook which is available from the Support Portal website.

Q: Will we still be able to send and receive software and support case documentation by way of Secure FTP?

A: Software and patches will be made available online. There is an “Exchanging Information with IBM Technical Support” area of our Support Portal which contains further info on sending and receiving files to/from IBM. Try to de-identify data first.

This slide displays some questions which our Master Data Management customers may have.

We are working on our remote access policies and infrastructure. Over the coming months, Initiate's staff will be moving to IBM corporate locations. Customers with whom Initiate has a site-to-site VPN have already received initial communications from Initiate and Initiate will get back in touch with them once Initiate has a clearer picture of what is necessary configuration-wise at the new premises. WebVPNs, Cisco and other VPN client access will be unchanged. There should not be any major issues with this infrastructure changeover.

Support SLAs at IBM differ from the legacy Initiate setup. You will have four severities to choose from. Each severity has a target response time of two hours. Severity 1s will always receive 24x7, 7-days-a-week support, while the other three rankings target responses within business hours only.

IBM makes all software and patches securely available online. There are also guidelines available for customers who want to securely exchange protected data with IBM. These guidelines can be found on the Support Portal by clicking the link "Exchanging Information With IBM Technical Support". De-identification of secure information before transmission is always suggested and appreciated.

IBM Support Portal and Handbook

Handbook: <http://www.ibm.com/support> -> **Software Support Handbook**

- Comprehensive information about IBM support offerings
 - Licensing (Passport Advantage)
 - Severity levels and response objectives
 - Processes for contacting support
 - Escalation procedures
 - Pointers to helpful information on IBM site
 - Service requests
 - Support life cycle – how support requests are handled

IBM Support Portal: <http://www.ibm.com/supportportal>

- Self-Service
 - Service Request Tool
 - User administration – Tech contacts, authorized users, authorized callers
 - Downloads (patches and software releases)
- Assistance
 - In-country telephone staff
 - Service Request Helpdesk
 - Training: Video Tours, IBM Education Assistant, YouTube
(<http://www.youtube.com/user/IBMelectronicssupport>)

IBM provides support in many different ways to our customers. The Support Handbook can be downloaded from <http://www.ibm.com/support> by clicking on the Software Support Handbook link. It provides a wealth of information about the support offerings that IBM has available and attempts to demystify terms and processes. It is also very user-friendly and easy to read.

The IBM Support Portal provides powerful features that make it fast and easy to find the exact information or tool you need, and contains links to many systems that can be used for self-help or to request assistance. You can also connect with the Support Portal experts and resources on Facebook, Twitter and even YouTube.

Quick Start Guide (the old support site should be used for production issues until you receive further communication from us)

- Setting yourself up on Support Portal
 - PSTCs and SSTCs: Sign up for your IBM Web ID online
 - Special signup URL will be in the "entitlement" email you received from IBM
 - Or, call IBM's administrative hotline on **877-426-6006**, M-F 8am-8pm E.T.
- To add new users to your account
 - New user goes to <http://www.ibm.com/account> and creates an IBM Web ID
 - They login to the Support Portal at <http://www.ibm.com/support>
 - They select "Service Request" in the menu on the left of their screen
 - They "request" access to your company's account by including your ICN (IBM Customer Number) in the request
 - You receive an automated email and authorize them as a user, caller or tech contact
 - Administrators can terminate access for anyone at any time
 - Authorized Callers can view but not submit SRs. Authorized Users can submit and view. PSTCs, SSTCs and Tech Contacts can work with SRs and perform online user administration
- To submit Service Request (support case/ticket)
 - Login to Support Portal: <http://www.ibm.com/support>
 - Click "Service Requests" on left of screen
 - Create new, respond to existing, and search for SRs by way of this interface
- Other features of Support Portal
 - Download software, search knowledge base, browse documentation, more

This slide displays a guide to get you up and running. While all the functionality described in the preceding slides is present, you should not use the IBM Support Portal just yet. We are planning to send more information as the time for cutover draws closer, so continue to use the older Initiate support site at <https://support.initiatesystems.com> and use these instructions just to have an early look around at the IBM site.

Primary and Secondary Site Technical Contacts at customer sites will receive an email with a URL that will enable administrative rights upon the creation of a new IBM Web ID. If you have any problems with this signup process, contact the administrative hotline at 877-426-6006 or by going to www.ibm.com/planetwide.

User administration is very straightforward and is accessed from the Support Portal by way of a link on the left side of the screen. Here is where you authorize additional users or terminate access for existing users if applicable. The different permission levels were explained in an earlier slide but for a refresher you should download the IBM Software Support Handbook. The brief process is that a user creates a Web ID, then requests permission to "join" a customer grouping by using the IBM Customer Number or ICN. You must supply the ICN to them separately. Automated emails are sent and once you confirm the request, they are immediately set up and able to access "your area" of the site.

Submitting a Service Request is very simple. Users with appropriate access select "Service Requests" after logging into the Support Portal. Choose a product line (Hardware or Software) and then choose the option to open a new Service Request. A form to fill out is presented, and when the SR has been submitted, IBM support will receive and act on the new PMR.

Consult the Software Support Handbook to learn about the various other features available on the Support Portal.

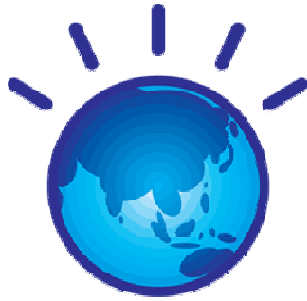
- Historically you received world-class customer support from Initiate. The people who delivered that service are now part of IBM, with their skills and knowledge retained.
- Resources only IBM can make available, allow our service to be improved upon.
- Central support concept for ALL IBM products, both hardware and software – no longer need to deal with multiple companies
- **Continue to use** <https://support.initiatesystems.com> **until the official switchover**
- More news in the upcoming weeks.. start bookmarking and stay tuned!

As you have seen, there will be many improvements to Initiate's customer support, both in terms of process and infrastructure.

Resources only IBM can make available allow that service to be improved upon. IBM's support philosophy is that customers should be helped at all times with critical problems and therefore Initiate customers are now routinely offered 24x7 support for Priority 1 incidents. We also believe you will see improvements in responsive cross-platform customer support, IBM software technical support for all your designated IT staff, remote Technical Support (RTS), and online electronic support functions you can use when you want, where you want. These are features that remain a critical element of your software maintenance.

If you have received an entitlement email from IBM with instructions on how to create your own web ID, you are ready to log into IBM's Support Portal. Spend some time familiarizing yourself with the layout and features. But once again, remember that until you receive an official announcement from IBM Initiate that our old support website has been retired, you must continue to use <https://support.initiatesystems.com> for your production support needs.

We will have more news for you as we draw closer to our full cutover date. Stay tuned!



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intelligent,
• People want it, We can do it.

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