

# PartnerWorld for Software Profile User's Guide

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Comments and questions should be addressed to [bpms@us.ibm.com](mailto:bpms@us.ibm.com) or to the Membership Centre serving your geography. For the contact information see *Contact Us* at the PartnerWorld for Software homepage, <http://www.ibm.com/partnerworld/software/>

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# Introduction to the PartnerWorld for Software Profile Editor

## *Overview*

The new easy-to-use online profiling capability will enable those Business Partners with multiple locations to enjoy simpler, more straightforward management of their relationships with IBM. At each company location, you may have a local administrator that maintains your location profile or you may opt to have one global administrator to maintain all location profiles. Establishing a Location Profile is required as part of the Application process to join PartnerWorld for Software. The Location Profile can be updated, and we urge you to keep your profile information up-to-date.

This User Guide will provide you step-by-step procedures for applying to the program and maintaining your profile.

## *How to Use this User's Guide*

The PartnerWorld for Software Profile User's Guide is organized into five major sections.

- w Introduction** - This section provides an overview of the PartnerWorld for Software Profile Users Guide and how to make the best use of the Profile Editor.
- w Getting Started** - In this section, you will find information about how to access the PartnerWorld for Software website, and how to register for an ID and password.
- w Applying to Partnerworld for Software** - This section provides information on how to join the program by creating an application.
- w How to use the Profile Editor to Enter Information** - This section provides information on the various types of data formats included and how to use them. This will help in creating the initial application to the program, as well as future updates to your profile.
- w Current Partners of the Partnerworld for Software Program** - Information is provided about how to access your existing profile, update it, join initiatives, take advantage of the Premier Enterprise Option, add new locations as PartnerWorld for Software Business Partner locations, and collect multiple locations into a single Enterprise Record.

## Getting Started

### *How to Register for an ID and Password*

Before accessing the PartnerWorld for Software Profile Editor, you will need to register. Once you have registered, you can then use your user ID and password to access the Profile Editor. (*Note: Those who are responsible for updating the company's profile using the Profile Editor will need to go through this process, register for their own user ID and password, and will need to include the ID in the company's Business Partner profile.*)

To access the IBM self-registration Web site, complete the following steps:

1. Access your Web browser.
2. In the Address or Location bar, enter the following Internet address and press **Enter**:

<http://www.ibm.com/partnerworld/software>

This will take you to the PartnerWorld for Software homepage.

3. From the PartnerWorld for Software homepage, select the option to “[Apply for membership](#)”. The link to the “[IBM Registration ID and password](#)” page appears under Step1.
4. At the IBM self-registration page, select the option to register for the first time and then follow the instructions that are provided.

After you have registered at the IBM self-registration site, you can return to it to change your personal information, change your password, or to request a new password. The registration site is the central location for individual user information, to be used throughout IBM Web sites. Registering will also allow you to have access to IBM products and services, and any of the IBM Web applications that display the IBM registration icon. You may therefore want to bookmark this web location with your browser.

*Note: The IBM self-registration site personal data (e.g. Name) is not shared with other systems. The id and password information is used for authentication; and none of the data is transferred to your Partnerworld for Software profile.*

Using your new ID and password, return to the PartnerWorld for Software homepage. When prompted, enter the ID and password to access the information and functions for Business Partners.

## Applying to PartnerWorld for Software

### *How to Join PartnerWorld for Software Business Partner Program*

Follow these steps to apply for membership in the PartnerWorld for Software program:

1. Start your web browser.
2. In the Address or Location bar, enter the following Internet address (also known as URL or Universal Resource Locator) and press **Enter**:

<http://www.ibm.com/partnerworld/software>

This takes you to the PartnerWorld for Software homepage. It is a good idea to bookmark this web location for future reference.

3. From the PartnerWorld for Software homepage, select the option to apply for membership. Follow the instructions using the links that are provided.
4. You should, if you have not already done so, follow the step under applying for membership which sets up an IBM Registration ID. Refer to the *How to Register for an ID and Password* section in this user guide for more information.
5. After you have an IBM Registration ID and password and have read the PartnerWorld Agreement, select the link to create a “[PartnerWorld for Software profile](#)”. You will be asked to indicate your acceptance of the agreement during the application process later.
6. You will be prompted for your IBM Registration ID and password. Enter your ID and password and then click **OK** to continue. The Profile Management System homepage appears.
7. On the left side of the Profile Management System homepage, you are presented with an option to change your language preference. Click the **Switch Language To** option to expand this section. To change the language of the text (i.e., instructions, helps, prompts, etc.) presented, click on one of the language choices. When another language has been chosen, the word *current* is displayed next to your choice.



*Note: The language choices listed are those in which the instructions, helps, and prompts may have been translated for the Profile Editor. If your language preference is not represented, contact the Membership Centre for your geography to request the language of your choice.*

8. You are presented the Profile Editor homepage, with the left-hand navigator function preselected to “Create New Profile”, the two applications for Partnerworld for Software displayed on the right, and

the Help option at the top. The two options for Help determine whether the application will be loaded into your browser with built-in contextual help for each field and navigation link. Because the amount of information to describe all the fields of a full application can be considerable, the default selection is “NO help text”. Select the type of help you would like.

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How would you like to edit your profile?

Online, with NO help text loaded. (Req'd for OS/2 users.)

Online, with help text loaded.

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9. Select one of the following links in the right-hand side of the screen in order to open an application:

The **Basic Application** link allows you join PartnerWorld for Software, and enter the minimum necessary information about your location (for example, company location address) and the administrator of the profile.

Select the **Application to PartnerWorld for Software and All Initiatives** link to access the full application.

10. When you have finished entering the profile information, click the **Submit** button to submit your new profile and save the information.
11. A confirmation screen appears. This screen provides you with a confirmation number regarding your application. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.
12. After you have completed your profile and have submitted it for processing, PartnerWorld for Software Membership Centre will contact you within ten business days. To check the status of your application, select the option to view pending changes from the navigator on the left side of the screen.

## How to Use the Profile Editor

### General Navigation and User Setup

The following is an example of the way that the Profile Editor displays an application (an empty profile) or a location profile during update:

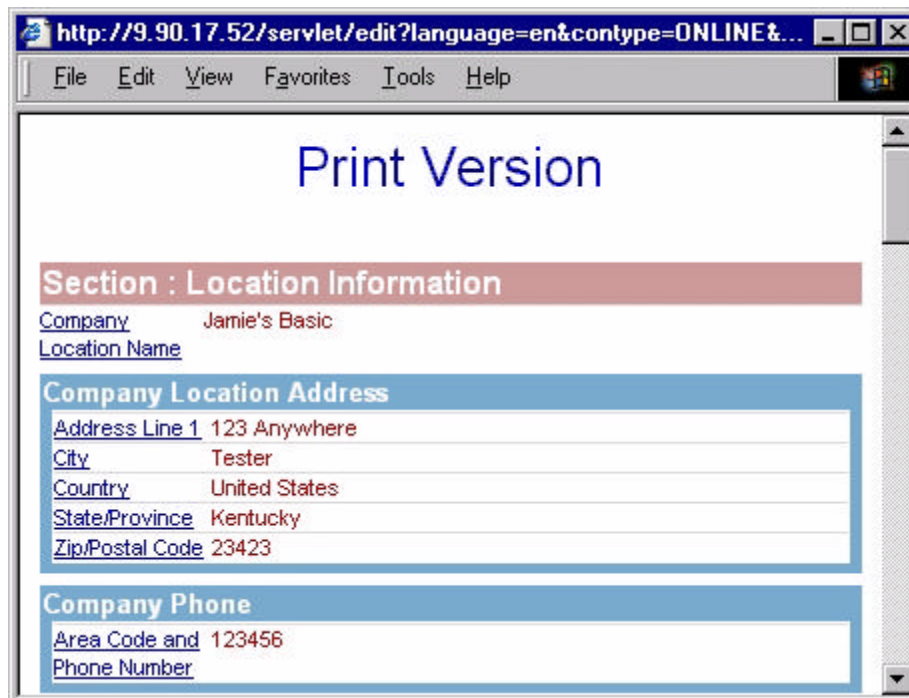
The screenshot shows a web application interface titled '(Full Application)'. On the left is a vertical navigation menu with the following items: 'Click Menu Item Below' (with sub-items: '+ Expand Menu', '- Collapse Menu', '? View Detailed Help', 'Show Print Version', 'Modify Preferences'), 'Location Information', 'Employee Information', 'General Information', 'Initiatives', 'Marketing Information', 'Level Criteria Information', 'Customer Reference', and 'Revenue'. The main content area is titled 'Location Information' and contains a checkbox for 'Click here to read and accept the agreement to join PartnerWorld for Software'. Below this are input fields for 'Company Location Name' (marked as a required field), 'Doing Business As Name', and 'Company Location Address' (with 'Address Line 1' as a sub-field). At the bottom of the main area are buttons for 'Submit', 'Exit', and 'Next Section >>'. A section titled 'Doing Business As Name' contains explanatory text: 'This location's Doing Business As (DBA) name. For example, this could be the location's abbreviated name like IBM.'

1. From the Menu navigation bar, select the **Expand Menu** or **Collapse Menu** option to expand and collapse the information. An example of the Menu navigation bar is show to the right:
2. You can navigate by doing one of the following:
  - w From the Menu navigation bar, select a specific section that you wish to display by clicking on one of the sections from the list. The Profile Editor displays the first field of that section.
  - w Click the << **Prev. Section** or **Next Section** >> button to access each section of the Profile Editor.

This screenshot shows a vertical navigation menu with the following items: 'Click Menu Item Below' (with sub-items: '+ Expand Menu', '- Collapse Menu', '? View Detailed Help', 'Show Print Version', 'Modify Preferences'), 'Location Information', 'Employee Information', 'General Information', 'PartnerWorld for Software Information', 'Value Package', 'Promote Business', 'Initiatives', 'Marketing Information', 'Level Criteria Information', 'Customer Reference', and 'Revenue'.



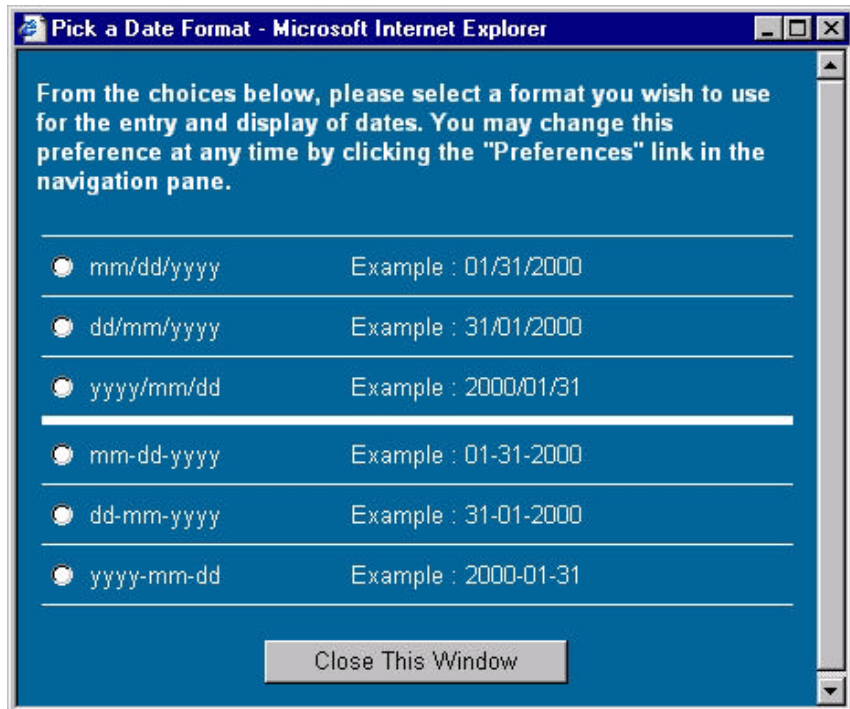
- w While in a section of the profile, the right-hand portion of the screen can be scrolled to reveal all of the information in that section. Tab to the field or use the scroll bar to bring the desired field into view.
3. The Show Print Version link accesses the Print Version view, which displays all the fields within the Profile Editor that contain data. To access this option, select the **Show Print Version** link from the Menu navigation bar. The Print Version view appears. The following is an example of the Print Version view:



From this view, you can print a copy of the profile. The Show Print Version view also allows you to edit the fields by clicking on the link to access that field within the Profile Editor.

- { Type **Ctrl+P** or choose **Print** from the File menu to print the profile information.
- { To close this window, click the **X** button located on the left side of the screen or select **File** > **Close** from the menu selection.

4. The Modify Preferences option allows you to choose a date format. To access this option, select the **Modify Preferences** link from the Menu navigation bar. The Pick a Date Format dialog box appears. An example of the Modify Preferences dialog is shown at the right. Click the format for dates that you prefer when working with the profile data. When you do, the selection window will close, you will see all dates that are contained in the profile in the format you selected, and you will be required to use the format for dates that you have selected, whenever you enter dates in the profile. To close this dialog box without making a selection, click **Close This Window** button.



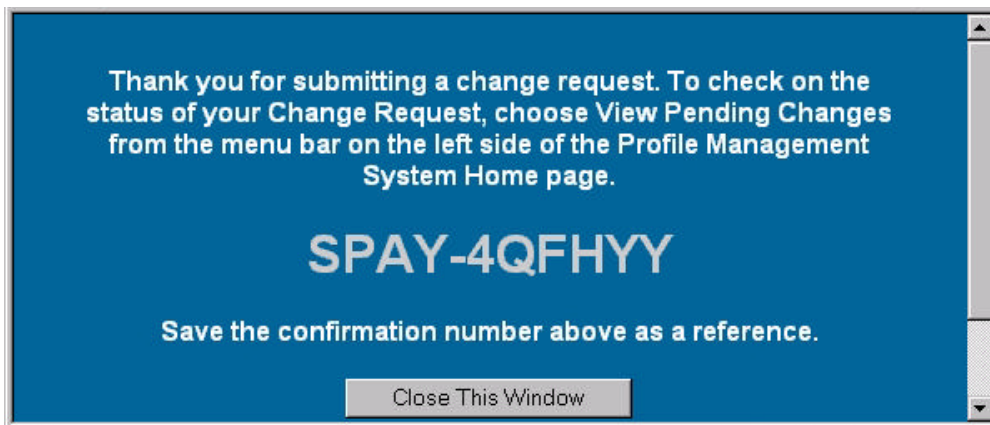
5. The Help Pane provides a description for each field, if the “With help” option to create or update the profile was chosen. The help is “contextual,” meaning that it changes as the cursor changes locations in the profile. In the example below, the cursor is placed on the “Doing Business As Name” field, as seen in the example at the top of Page 8.



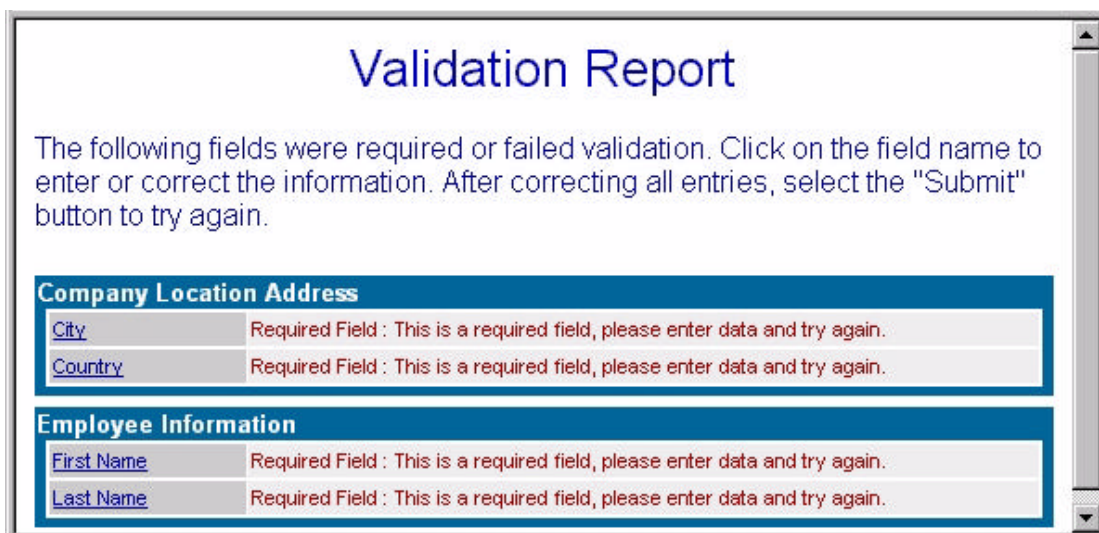
6. After you have finished entering the profile information, click the **Submit** button to submit your profile and to save the Information.

This screen changes to provide you with a confirmation number regarding your request. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window**

button.



7. If you pressed the **Submit** button but had not entered all required information in the fields that were indicated as *Required Fields*, or if a field failed validation, the Validation Report screen displays prompting you to enter the required information or correct the Information.



If you received a Validation Report, the changes you have made have *not* been submitted. Complete the following steps:

- a. From the Validation Report screen, click on the link to access that field within the Profile Editor. The field name is the link. You will be directly linked to the field in the profile referenced by the Validation report. Make the correction.
- b. Return to the Validation Report and follow the next link. Repeat this process until you have make the necessary corrections.

- c. After the correct information has been entered for the fields that have failed validation and information has been entered for all required fields, select the **Submit** button again to submit the profile and save the information.
  - d. The Validation Report, which is in its own browser window, can be closed by clicking the “X” at the top-right of the window.
9. If you do *not* want to submit the changes you have made, you may exit the Profile Editor without saving the information by clicking the **Exit** button, instead of the **Submit** button.

## How to Update Different Types of Data Formats

This section of the Profile Users Guide shows the types of information fields found in the profile and how to manipulate data in those fields. The Profile Editor uses the following data formats for editing the information:

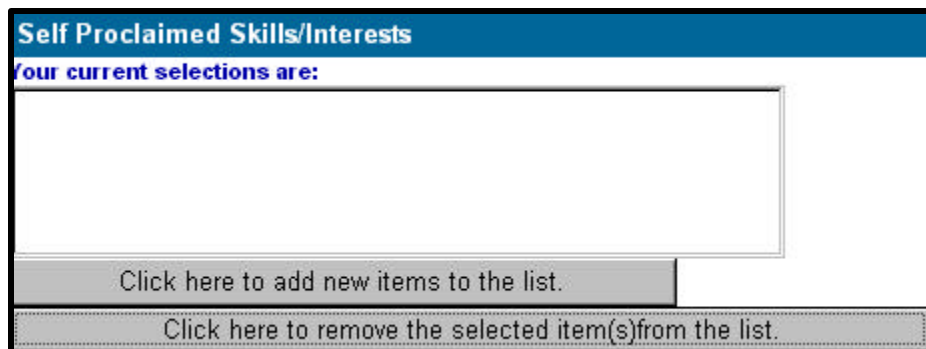
- w **Fill in the blank** - Place the cursor in the box to fill in the information.
- w **Selection list** - Click the **down** arrow and then select the appropriate value. The following is an example of a selection list:



- w **Multiple selections** - Complete the following steps:
  1. Highlight the appropriate values from the list presented. The following is an example of a multiple selection list box:



2. To add additional selections from the multiple selection list, hold down the **CTRL** key while clicking on an item or to remove a selection, click on that item while holding down the **CTRL** key. A group of items that are next to each other can be selected by holding down the **Shift** key while selecting the first item in the group and then selecting the last one in the group.
- w **Multiple lists in a hierarchical tree selection list** - This type of selection list allows you to add multiple lists. The following is an example of the hierarchical tree selection list:

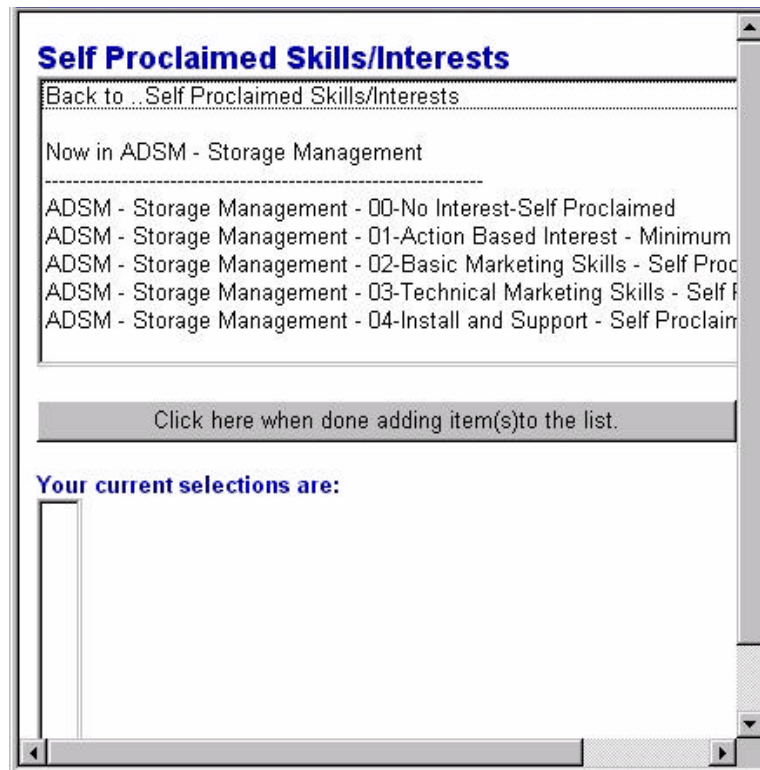


Complete the following steps:

1. Select the **Click here to add new items to the list** button to display the selection list. The following is an example of a hierarchical tree selection list:

The screenshot shows a web form titled "Self Proclaimed Skills/Interests". At the top, there is a dropdown menu with the text "... Select One ...". Below the dropdown is a list of skills and interests: ADSM - Storage Management, AIX, AntiVirus, Application Development, Content Management, Data Management, DataJoiner, and DataPropagator. To the right of this list is a vertical scrollbar. Below the list is a button with the text "Click here when done adding item(s) to the list.". Below the button, the text "Your current selections are:" is displayed, followed by an empty rectangular box for displaying the selected items.

2. Select from the list to display the next selection list. The following is an example of the selection list that displays:



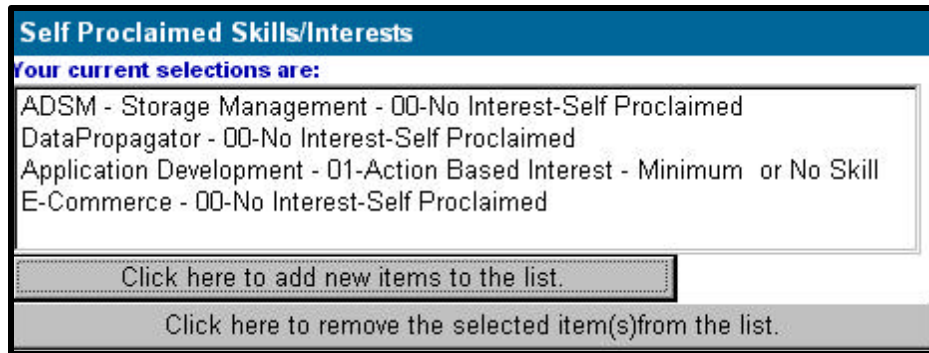
3. You are then prompted to choose the items in this section. Select the next level from the selection list. Each time that you make a selection, this item is listed in the **Your current selections are** box.

***Note:** For sections that allow you to add multiple selections, hold down the **CTRL** key while clicking on an item or to remove a selection, click on that item while holding down the **CTRL** key. Each item that you select is then added to your current selection list.*

4. Continue adding items to the list. To keep track of where you are in the selection list, refer to the **Now In . . .** Information. To return back to a previous list, select the **Back to . . .** selection located at the top of the screen.
5. Once you have finished adding items to the list, click the **Click here when done adding item(s) to the list** button to close the hierarchical tree selection list. Your selections are now listed in the **Your current selections are** box. The following is an example of the



current selection list:



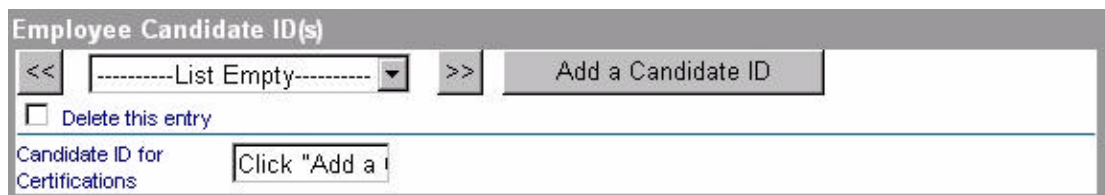
6. To delete an item from the selection list, select that item and then click the **Click here to remove the selected item(s) from the list** button. To select more than one item, hold down the **CTRL** key and then click each item you want to select or click on that item while holding down the **CTRL** key to remove a selection. To select a group of items that are next to each other, hold down the **Shift** key while selecting the first item and then select the last one in the group.

**w Optional selections** - Do the following:

1. When the optional box is checked, this indicates that you wish to enter information for this section of the profile. If the optional box is not selected and you attempt to enter data into any of the fields for that section, an error message displays prompting you that the optional box must be selected.
2. Click **OK** to continue, then check the box and continue to enter the information.

**w Add a new entry section** - Complete the following steps:

1. To access an existing entry, click the **down** arrow and select from the list. You can also click on the **left/right** arrow (<< and >>) to scroll through the list. Once you have reached the end of the list, a dialog box appears letting you know that there are no more entries in that direction. Click **OK** to continue. The information about the selected entry will appear in the fields below the selection. The following is an example of a multiple entry section:



2. Click the button that allows you to add new information. If you attempt to insert data into one of the fields for that section before selecting this button, an error message displays prompting you to click on the button that allows you to add a new entry. Click **OK** to



continue and then select the new entry button to enter the values again. To delete an entry, check the box that allows you to delete an entry. The selected entry will be deleted when the request is submitted

## Current PartnerWorld for Software Partners

Now that you have been approved for membership in the PartnerWorld for Software Program, refer to this part of the users guide to find out how to get the most out of the Profile Editor to manage your relationships.

### *Updating Your Profile*

After your application has been approved, and your profile has been created, you can select the option to update your new profile, as long as you have been given the role, or authority, of making edits. See the *Employee Access Roles* section below for more information. To update a profile, follow these steps:

1. Start your web browser.
2. In the Address or Location bar, enter the following Internet address (also known as URL or Universal Resource Locator) and press **Enter**:

<http://www.ibm.com/partnerworld/software>

This takes you to the PartnerWorld for Software homepage.

3. In the left-hand navigation panel, select the “Business Partner Zone” link.
4. You will be prompted for your IBM Registration ID and password. Enter your ID and password and then click **OK** to continue.

*Note: If you are presented with a list of locations, it is because you are listed in those locations as an employee. Select the location for which you want to operate during this session by clicking on it. If you are not presented with a list of locations, you will instead go to the next step immediately.*

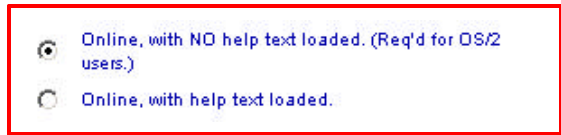
5. You will be presented with the “Welcome” screen, or homepage for the PWSW Partner Zone. It is the homepage of all the information that is entitled only to active Partnerworld for Software Business Partners.

*Note: You may choose to bookmark this page, as it will be the “homepage” for future web activities, now that you are a Business Partner.*

6. In the left-hand navigation panel, click on the “Membership Centre” link, and then to the “Profile Administration” link that appears under that.

7. You will be presented in the right-hand viewing area the options that are appropriate for your location, based on your location's level in Partnerworld for Software, etc. Click on the "Update your Business Partner Profile" link. If necessary, review the instructions provided. When you are ready, click on the appropriate link to **update** your profile.

8. The two options for Help determine whether the application will be loaded into your browser with built-in contextual help for each field and navigation link. Because the amount of information to describe all the fields of a full application can be considerable, the default selection is "NO help text". Select the type of help you would like.



9. Select your profile from the list by clicking on it. All those locations for which you are authorised to update the profile will be listed. Clicking on the profile will load the profile into your browser for update.

10. When you have finished updating the profile information, click the **Submit** button to submit the changes and save the information.

## *How to View the Status of Changes You have Submitted*

1. Start your web browser.
2. In the Address or Location bar, enter the following Internet address (also known as URL or Universal Resource Locator) and press **Enter**:

<http://www.ibm.com/partnerworld/software>

This takes you to the PartnerWorld for Software homepage.

3. In the left-hand navigation panel, select the “Business Partner Zone” link.
4. You will be prompted for your IBM Registration ID and password. Enter your ID and password and then click **OK** to continue.  
*Note: If you are presented with a list of locations, it is because you are listed in those locations as an employee. Select the location for which you want to operate during this session by clicking on it. If you are not presented with a list of locations, you will instead go to the next step immediately.*
5. You will be presented with the “Welcome” screen, or homepage for the PWSW Partner Zone. It is the homepage of all the information that is entitled only to active Partnerworld for Software Business Partners. *Note: You may choose to bookmark this page, as it will be the “homepage” for future web activities, now that you are a Business Partner.*
6. In the left-hand navigation panel click on the “Membership Centre” link, and then to the “Profile Administration” link that appears under that.
7. You will be presented in the right-hand viewing area the options that are appropriate for your location, based on your location’s level in Partnerworld for Software, etc. Click on the “Update your Business Partner Profile” link. If necessary, review the instructions provided. When you are ready, click on the appropriate link to **check the status** of your changes.
8. The next page provides a list of the change request(s) that have been submitted in the last thirty days. The Status column will indicate the status of your request. To review the changes made, select a change request by clicking on it.
9. Select the **Exit** button to close the change request being viewed.

## ***How to Create Additional Locations for the PartnerWorld for Software Program***

1. Start your web browser.
2. In the Address or Location bar, enter the following Internet address (also known as URL or Universal Resource Locator) and press **Enter** or select the bookmark you have previously saved:

<http://www.ibm.com/partnerworld/software>

This takes you to the PartnerWorld for Software homepage.

3. In the left-hand navigation panel, select the “Business Partner Zone” link.
4. You will be prompted for your IBM Registration ID and password. Enter your ID and password and then click **OK** to continue.

***Note:** If you are presented with a list of locations, it is because you are listed in those locations as an employee. Select the location for which you want to operate during this session by clicking on it. If you are not presented with a list of locations, you will instead go to the next step immediately.*

5. You will be presented with the “Welcome” screen, or homepage for the PWSW Partner Zone. It is the homepage of all the information that is entitled only to active Partnerworld for Software Business Partners.

***Note:** You may choose to bookmark this page, as it will be the “homepage” for future web activities for you, now that you are a Business Partner.*

6. In the left-hand navigation panel click on the “Membership Centre” link, and then to the “Profile Administration” link that appears under that.
7. You will be presented in the center viewing area with the options that are appropriate for your location, based on your location’s level in Partnerworld for Software, etc.
8. Click on “Create New Profile” link.
9. Select one of the following links:
  - w The **Basic Application** link allows you join PartnerWorld for Software, and enter information about your location (for example, company location address) and the administrator of the profile.
  - w Select the **Application to PartnerWorld for Software and All Initiatives** link to access the full application.
10. When you have finished entering the profile information, click the **Submit** button to submit your new profile and save the information.

11. A confirmation screen appears. This screen provides you with a confirmation number regarding your application. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.

After you have completed your profile and have submitted it for processing, PartnerWorld for Software Membership Centre will contact you within ten business days. To check the status of your application, select the option to view pending changes from the navigator on the left side of the screen. (*Note: Processing time for the request will be approximately four hours during normal business hours for the geographic locale of your Membership Centre.*)

## ***How to Apply for Initiatives as a PartnerWorld for Software Business Partner***

Applying for various initiatives as a Software Business Partner is accomplished by *updating* the profile. To apply for an initiative, follow the directions for *Updating Your Profile* to open the profile for update.

1. From the left Menu navigation bar, select the **Initiative** link to open that portion of the profile in the right portion of the screen. Each initiative that has not already been selected will be represented by a check-box. *Note: You must apply to PartnerWorld for Software before you can select the Initiative link.*
2. If you wish to accept an initiative relationship (i.e., Lotus, Lotus Authorized Education Centers, Service Providers for e-business, IBM Firm Certification for e-business, or Sales Assistance Program), select the check box to apply to that initiative. From the Initiatives section, do the following:
  - a. Select **Apply to Lotus** to join the Lotus Initiative. If you want incremental Lotus benefits at the Advanced and Premier level in PartnerWorld for Software, you must meet the Lotus Initiative criteria. Complete information on the Lotus Initiative can be found at [www.ibm.com/partnerworld/software](http://www.ibm.com/partnerworld/software) => Membership Centre => Lotus Initiative.
    - w Participation in the Lotus initiative at the Member level within PartnerWorld for Software requires you to complete the required fields shown, along with the required PartnerWorld for Software fields found elsewhere in this profile form.
    - w Participation in the Lotus initiative at the Advanced level within PartnerWorld for Software requires one Certified Lotus Professional at your location. The candidate id for the Certified Lotus Professional must be included in your PartnerWorld for Software profile. The Candidate ID field can be found in the Employee Information section.
    - w Participation in the Lotus initiative at the Premier level within PartnerWorld for Software requires three Certified Lotus Professionals, one e-business Sales certification, three Lotus customer references, and Lotus sales/influence targets per location. The candidate ids for the Certified Lotus Professionals and e-business Sales certification, along with the Lotus customer references and Lotus sales/influence reports must be included in this profile. The candidate id field can be found in the Employee Information section, and the customer references and sales/influence fields can be found in the Level Criteria section.

*Note: Guidance regarding the sales/influence requirement at the Premier level in PartnerWorld for Software will come from your country support team.*

Participation in the Lotus Initiative requires you to complete the fields in that section, along with the required PartnerWorld for Software fields found elsewhere in the profile. To fill in the information for the Lotus Initiative click on the **Lotus** section in the left navigator that now appears. This will open that section of the profile.

- b. Select **Apply to the Lotus Authorized Education Centers (LAEC)** to join the Lotus Authorized Education Centers Initiative. Additional information regarding the LAEC initiative can be

found at [www.ibm.com/software](http://www.ibm.com/software) => Membership Centre => Cross-PartnerWorld Initiatives.

Participation in the Lotus Authorized Education Centers Initiative requires you to complete the fields in that section, along with the required PartnerWorld for Software fields found elsewhere in the profile. To fill in the information for the Lotus Authorized Education Centers Initiative click on the **LAEC** section in the left navigator that now appears. This will open that section of the profile.

- c. Select **Apply to the Service Providers for e-business** to join the Service Providers for e-business Initiative.

- ✎ PartnerWorld for Software Member level for Service Providers for e-business requires a Commercially Available Service via Net.

- ✎ PartnerWorld for Software Advanced level for Service Providers for e-business requires 1 Certification or qualification for IBM e-business Mark and one customer reference with 1 IBM element. (Refer to the appropriate section of the Partnerworld for Software Track Guide.)

Participation in the Service Providers for e-business Initiative requires you to complete the fields in that section, along with the required PartnerWorld for Software fields found elsewhere in the profile. To fill in the information for the Service Providers for e-business Initiative click on the **Service Providers for e-business** section in the left navigator that now appears. This will open that section of the profile.

- d. Select **Apply to the IBM Firm Certification for e-business** to join the IBM Firm Certification for e-business Initiative. A confirmation dialog box appears:



To read the addendum, select the **Click here to read the e-business firm certification** link. Once have read and accepted the terms of the addendum, select Yes to close the confirmation dialog.

Participation in the IBM Firm Certification for e-business Initiative requires you to complete the fields in that section, along with the required PartnerWorld for Software fields found elsewhere in



the profile. To fill in the information for the IBM Firm Certification for e-business Initiative click on the **IBM Firm Certification for e-business** section in the left navigator that now appears. This will open that section of the profile.

- e. Select **Apply to the Sales Assistance Program** to join the Sales Assistance Program Initiative. Participation in the Sales Assistance Program Initiative requires you to complete the fields in that section, along with the required PartnerWorld for Software fields found elsewhere in the profile. To fill in the information for the Sales Assistance Program Initiative click on the **Sales Assistance Program** section in the left navigator that now appears. This will open that section of the profile.

After you have entered information in all of the required fields, click the **Submit** button. Your request is then reviewed by the Membership Centre. Processing time for the request will be approximately four hours.

## ***Employee Access Roles for Profile Update***

The ability to update the location profile must be specifically assigned to the employee(s) of the location as follows. From the left Menu navigation bar, select the Employee Information link.

1. Follow the steps for *Updating Your Profile*, and open the appropriate location profile for update. Note that in order to make changes to an employee's role for profile update, the user performing these steps must be already designated the role of "Authorized Profile Administrator":
2. If the employee you want to designate is already entered into the profile, select that employee by clicking the **down** arrow and selecting from the list. You can also click on the **left/right** arrow (<< and >>) to scroll through the list until the employee's name appears.
3. On the right side of the browser screen, scroll down the information for the selected employee to the section shown here:
4. Make sure that the IBM Registration ID for this individual is correctly entered in the "IBM Registration User ID" blank.
5. Select the profile update role for this individual by selecting one of the two values for "Profile Access". The two options are explained as follows:

- { **Authorised Profile Administrator (APA):** An employee with this role can update all information in the profile *and* can grant other individuals the same role. That is, only those with this role can make a selection in this field.
- { **Edit Access:** An employee with this role can update all information in the profile *except for* this field. That is, such an employee cannot grant or modify the authority of another user to update the profile.

The screenshot shows a form titled "Access Role" with a blue header. It contains three input fields:

- IBM Registration User ID:** A text box containing the value "abc123".
- Profile Access:** A dropdown menu currently showing "-Select One".
- Value Package Role(s):** A dropdown menu with a list of options: "-Select One", "Authorised Profile Administrator(APA)", and "Edit Access". The "Authorised Profile Administrator(APA)" option is highlighted.

6. When you have finished updating the profile information, click the **Submit** button to submit the changes and save the information.
7. After the change has been approved, the employee(s) you have designated for **Authorised Profile Administrator** and **Editor** roles will be able to access this profile using the steps in the *Updating Your Profile* section.

## ***How to Employ the Premier Enterprise Option***

The Premier Enterprise Option allows you to pool your Premier level qualification criteria across multiple, designated locations within a single geography (EMEA, NA, LA, or AP). By applying to create an Enterprise Profile and adding these multiple, designated locations to it you will distribute your earned benefits across the designated locations, making them all Premier level, assuming the aggregation of criteria meets the minimums for the option.

***Note:** The administrator of the Premier Enterprise Option profile and the administrator for each location will need to agree on which profiles will be part of the Premier Enterprise Option, as both will make appropriate entries in their respective profiles*

Before accessing this option, you must have a valid IBM Registration User ID (refer to the *How to Register for an ID and Password* section).

### **Applying to Create a Premier Enterprise**

The application for the Premier Enterprise Option can be created only by an employee of a location which is already at the Premier level. This guarantees that one of the criteria of the option is initially met -- that is, that there must be at least one location, as part of the Premier Enterprise Option, that is already Premier. To create a Premier Enterprise Option Profile, complete the following steps:

1. Start your web browser.
2. In the Address or Location bar, enter the following Internet address (also known as URL or Universal Resource Locator) and press **Enter** or select the bookmark you have previously saved:

<http://www.ibm.com/partnerworld/software>

This takes you to the PartnerWorld for Software homepage.

3. In the left-hand navigation panel, select the “Business Partner Zone” link.
4. You will be prompted for your IBM Registration ID and password. Enter your ID and password and then click **OK** to continue.

***Note:** If you are presented with a list of locations, it is because you are listed in those locations as an employee. Select the location for which you want to operate during this session by clicking on it. If you are not presented with a list of locations, you will instead go to the next step immediately.*

5. You will be presented with the “Welcome” screen, or homepage for the PWSW Partner Zone. It is the homepage of all the information that is entitled only to active Partnerworld for Software Business Partners.

*Note: You may choose to bookmark this page, as it will be the “homepage” for future web activities for you, now that you are a Business Partner.*

6. In the left-hand navigation panel click on the “Membership Centre” link, and then to the “Profile Administration” link that appears under that.
7. You will be presented in the main viewing area with the options that are appropriate for your location, based on your location’s level in Partnerworld for Software, etc. Click on the “Premier Enterprise Option” link and the following links in order to read the information that explains the option and the benefits of it.
8. Click on “Apply for Premier Enterprise Option”.
9. The Profile Editor page appears. The following is an example of the Premier Enterprise Option Profile Editor:

The screenshot shows a web form titled "(New Application)". On the left, a blue sidebar contains the text "Click Menu Item Below". The main form area has a blue header with the title "(New Application)". Below the header, there are several input fields: "Premier Enterprise Number" (with a value of "null"), "Premier Enterprise Name" (a required field), and an "Approver" section. The "Approver" section includes a list box with "-----List Empty-----", "Add an Entry" and "Delete this entry" buttons, and an "IBM Reg ID" field with the placeholder text "Click 'Add an Entry'". At the bottom of the form, there are "Submit" and "Exit" buttons. A blue box at the very bottom is titled "Premier Enterprise Number" and contains the text "The enterprise identification number."

10. At the **Premier Enterprise Name** field, enter the name that you have chosen for the Enterprise Profile.
11. Press the **Add an Entry** button in order to enter the **IBM Registration ID** of yourself or the employee that you want to be the Authorised Administrator of this profile. Then enter the ID in the blank provided. You may add additional IBM Registration Ids by repeating this operation. Whoever you enter into this profile is the user who will be able to perform the steps below under *Accepting Locations into the Enterprise Profile*.
12. When you have finished entering the information, click **Submit** to apply to create an Enterprise.

13. A confirmation screen appears. This screen provides you with a confirmation number regarding your request. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.
14. To check the status of your request later, select the option to view your change request(s) status from the navigator on the left side of the screen. (*Note:* Processing time for the request will be approximately four hours.)

The following steps are performed by the Premier Enterprise Option profile administrator, in conjunction with the authorised profile administrator(s) for the designated locations.

### **Updating the Location Profiles With the Premier Enterprise Option Identifier**

After the Premier Enterprise Option profile has been approved, follow these steps to update the designated location profiles with the Premier Enterprise Option identifier:

1. As the administrator of the Premier Enterprise Option Profile follow the steps for *Updating Your Profile*, and open the Premier Enterprise Option profile. A Premier Enterprise Number has now been assigned to your approved profile. This approved profile identifier number will be used in the profiles that will be part of this Premier Enterprise.
2. Copy or write down the Premier Enterprise Number and then close the Premier Enterprise Profile Editor.
3. As the administrator of one of the designated Location Profiles follow the steps for *Updating Your Profile* and open that profile for update. .
4. From the Profile Editor page, select **PartnerWorld for Software** from the left-hand navigator, to access that section of the profile. The following is an example of the PartnerWorld for Software section of the Profile Editor:

Location ID	bsxzw0k
Benefit Level	
Status	
Start Date	
Version Number of the Electronic Agreement	<input type="text"/>
Enterprise ID	<input type="text"/>

5. At the **Enterprise ID** field, enter the Premier Enterprise Number information that you copied from the Premier Enterprise Profile.
6. Click **Submit**.

7. A confirmation screen appears. This screen provides you with a confirmation number regarding your request. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.
8. To check the status of your request, select the option to view your change request(s) status from the navigator on the left side of the screen. (*Note: Processing time for the request will be approximately four hours.*)
9. Repeat steps 4 and following to include the other locations that will be a part of the Premier Enterprise.

### **Accepting Locations into the Premier Enterprise Profile**

As the administrator of the Premier Enterprise Profile, follow these steps to accept the locations into the enterprise profile:

1. After the requests have been approved for all locations, follow the steps for *Updating Your Profile*, and open the Enterprise Profile for update.
2. From the Enterprise Profile Editor page, check the box that allows you to approve the participants of the Premier Enterprise. The following is an example of this section of the Premier Enterprise Profile Editor:

The screenshot displays two identical sections for participant approval. Each section is titled 'Participants' and contains the following information:

- Profile ID:** ahrfqrc (top) and ajmpz6p (bottom)
- Title:** John Keells Computer Services (Pvt) Ltd (top) and Netcom (bottom)
- Approved Participants:** A checkbox labeled 'Approve the participant' is present in both sections.

3. After you have approved all the participants you want to be part of the Premier Enterprise, click the **Submit** button.
4. A confirmation screen appears. This screen provides you with a confirmation number regarding your request. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.

5. To check the status of your request, select the option to view your change request(s) status from the navigator on the left side of the screen. (*Note: Processing time for the request will be approximately four hours.*)
6. The system will now determine if the “pooled” qualifications meet the criteria for the Premier Enterprise Option. If so, the system will automatically make the appropriate updates to the designated locations, causing their benefit level to be Premier. Nothing additional is required for the benefit to accrue.

*Note: You may choose to bookmark this page, as it will be the “homepage” for future web activities for you, now that you are a Business Partner.*

7. In the left-hand navigation panel click on the “Membership Centre” link, and then to the “Profile Administration” link that appears under that.
8. You will be presented in the main viewing area with the options that are appropriate for your location, based on your location’s level in Partnerworld for Software, etc. Click on the “Creating an Enterprise Record for your multiple locations” link. When you are ready, click on the “Apply for an Enterprise Record” link.
9. Click on “Apply for Premier Enterprise Option”.

## ***How to Designate Locations as part of a Single Enterprise***

The Enterprise Record provides a way to reflect your company's organization across multiple company locations, each of which is represented by its own Location Profile. By applying to create an Enterprise Record and adding all of your locations to it you will provide a means by which IBM can understand the contributions that your organization makes as a whole.

***Note:** Unlike the "Premier Enterprise Option" there is no sharing of benefit levels or the need for both the administrator of the Enterprise Record and the administrator for each location to agree on which profiles will be part of the Enterprise Record.*

Before performing these steps, you must have a valid IBM Registration User ID (refer to the *How to Register for an ID and Password* section). The Enterprise Record can be created by any employee of an active PartnerWorld for Software Program location. To create an Enterprise Record, complete the following steps:

1. Start your web browser.
2. In the Address or Location bar, enter the following Internet address (also known as URL or Universal Resource Locator) and press **Enter** or select the bookmark you have previously saved:

<http://www.ibm.com/partnerworld/software/>

This takes you to the Partnerworld for Software homepage.

3. In the left-hand navigation panel select the "Business Partner Zone" link.
4. You will be prompted for your IBM Registration ID and password. Enter your ID and password and press **OK** to continue.

***Note:** If you are presented with a list of locations, it is because you are listed in those locations as an employee. Select the location for which you want to operate during this session by clicking on it. If you are not presented with a list of locations, you will instead go to the next step immediately.*

5. You will be presented with the "Welcome" screen, or homepage for the PWSW Partner Zone. It is the homepage of all the information that is entitled only to active Partnerworld for Software Business Partners.

***Note:** You may choose to bookmark this page, as it will be the "homepage" for future web activities for you, now that you are a Business Partner.*

6. In the left-hand navigation panel click on the "Membership Centre" link, and then to the "Profile Administration" link that appears under that.



7. You will be presented in the main viewing area with the options that are appropriate for your location, based on your location’s level in Partnerworld for Software, etc. Click on the “Creating an Enterprise Record for your multiple locations” link
8. Click on “Apply for an Enterprise Record”.
9. The Profile Editor page appears, a portion of which is pictured below.

(new \*)

PWSW ID

Enterprise Name  \* Required Field

Enterprise Contact

Title

**Enterprise Contact Address**

Line One  \* Required Field

Line Two

Line Three

Line Four

City  \* Required Field

Country  \* Required Field

State  \* Required Field

Postal Code

\*\*Only for countries that require zip codes. Refer to the Help below for a listing of those countries.

Enterprise Contact Phone

Enterprise e-mail

10. At the **Enterprise Name** field, enter the name of the Enterprise. Continue entering information for each field. Refer to the Help Pane for a field description, if you have set your option for editing “with help”. For more information about setting the “help” option or about the Profile Editor, refer to the *How to Use the Profile Editor* section.
11. At the **Partnerworld for Software Locations in Enterprise** field, click on “New” and enter the Profile Identifier (PWSW ID) of the designated location. Repeat this step for all locations.

12. At the **Authorised Enterprise** Administrator field, click on “New” and enter the **IBM Registration ID** of yourself or the employee that you want to be the Authorised Administrator of this profile. Then enter the ID in the blank provided. You may add additional IBM Registration Ids by repeating this operation. Whoever you enter into this profile is the user who will be able to perform the steps below under *Accepting Locations into the Enterprise Profile*.
13. When you have finished entering the information, click **Submit** to apply to create an Enterprise Record.
14. A confirmation screen appears. This screen provides you with a confirmation number regarding your request. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.
15. To check the status of your request later, select the option to view your change request(s) status from the navigator on the left side of the screen. (*Note: Processing time for the request will be approximately four hours.*)