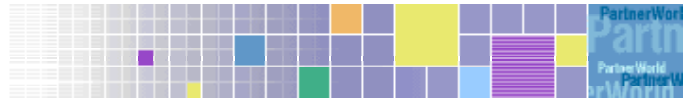


**PartnerWorld**  
for Software



# **PartnerWorld for Software**

## **Users Guide 2002**

Revised May 2, 2002

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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, click on the **Contact us** link at the top right of the PartnerWorld for Software home page located at <http://www.ibm.com/partnerworld/software/>. Note that this links to a different set of contact numbers than the *Contact* link at the bottom of the page, which is the contact information for IBM in general.

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# Getting started with PartnerWorld for Software

## Overview

*PartnerWorld for Software (PWSW)* supports your efforts to create new revenue and market opportunities by leveraging your unique relationship with IBM as a Business Partner. Through best-in-class benefits delivered through PartnerWorld for Software, you will have access to worldwide marketing and enablement support, tiered according to membership level, for capitalizing on e-business solutions. Business Partners with multiple locations will find it simple and straightforward to manage their administrative relationship with us with the online profiling capability.

PartnerWorld for Software provides unparalleled marketing, sales, software, and technical support for you to drive the sale of complete e-business solutions, including those built from IBM's software family of offerings.

## Standards and Conventions

In order to make this User's Guide easy to read, the following conventions will be used throughout the documentation.

- Controls, such as buttons, that require a user click are displayed in **bold**.
- Labels that identify a field are indicated with *italics*.
- Unless otherwise specified, 'click' indicates a left-click with a mouse.
- *PartnerWorld for Software* may be abbreviated as *PWSW*.



*Items of particular importance will be indicated by the 'Note' symbol.*

---



*Tips and suggestions will be indicated by the 'Tip' symbol.*

---

Some words in this document and within PartnerWorld for Software may use the British English spelling variation. These include:

<u>British English</u>	<u>American English</u>
Centre	Center
Authorised	Authorized
Catalogue	Catalog

## System Requirements

The *PartnerWorld for Software* website may be accessed at:

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

The *PartnerWorld for Software* web environment requires the following browsers to be at a base level version of:

- Netscape: Version 4.6 through 4.79 (Netscape 6 is currently not supported ‡)
- Internet Explorer: Version 5.0 through 5.5 (IE6 is currently not supported ‡)



*Be sure that Cookies and JavaScript functionality is enabled on your browser.*

---

‡ PWSW may work in later browser versions, but it has not been thoroughly tested in those environments.

## Welcome to the PartnerWorld for Software Environment



For easy access, it is a good idea to bookmark the PartnerWorld for Software homepage located at <http://www.ibm.com/partnerworld/software>.

There are two general regions available within the PartnerWorld for Software (PWSW) web site. They include the public area available for anyone to explore, and the private area reserved for IBM Business Partner members.

### **The Public Part of PartnerWorld**

When someone first enters the PartnerWorld for Software web site at <http://www.ibm.com/partnerworld/software>, they will initially only have access to the public area of the site. This area includes an overview on the PartnerWorld for Software program, feature comparisons between the three membership levels, access to the Business Partner Directory, PartnerWorld for Developers, and IBM contact information.

### **Business Partner Zone**

The Business Partner Zone is the private area for IBM Business Partner members of any level. The Zone may be entered from the homepage of PartnerWorld for Software, or from the *Business Partner Zone* menu link on the left side of any of the public pages.

When attempting to enter the zone, a password dialog box appears requesting your Registration ID and Password.

Enter Network Password

Please type your user name and password.

Site: www-100.ibm.com

Realm: /

User Name: heffner

Password: \*\*\*\*\*

Save this password in your password list

OK Cancel

Password Dialog Box (Internet Explorer)

Username and Password Required

Enter username for / at www-100.ibm.com:

User Name: heffner

Password: \*\*\*\*\*

OK Cancel

Password Dialog Box (Netscape)

After entering the zone, a list will be displayed of all the locations to which you are a member. Enter the desired location by clicking the appropriate hyperlink. You may later switch locations by clicking the **Switch Location** menu option on the left side, and selecting a different location. If you only belong to one location, you will automatically enter the Zone at that location.



*If you attempt to enter the Business Partner Zone with your Username and Password, but have not yet been authorized to view your company's zone location, you will see the following message:*

***"We are sorry, but according to your Company location profile, you are not entitled to view the information to which you were trying to link. If you feel this is an error, please [contact your Geography's Membership Centre](#) for further information."***

*The solution is to have the Authorized Profile Administrator add you to the Profile of one or more locations.*

---



## The Business Partner Profile

### ***Profile Overview***

The *Business Partner Profile* is used to register and maintain all the company contact information, business description, classification, skills, certifications, and market focus of an IBM Business Partner. Including this information in the company Profile allows the company to be located by potential business partners or customers.



*The user who submits an application automatically becomes the Authorized Profile Administrator. Only the Authorized Profile Administrator or Editor can update the company Profile after it has been approved.*

---

### ***Registering for an IBM Registration ID and Password***

Each employee who will be entering the Business Partner Zone will need to have his own IBM *Registration ID* and *password* in order to gain access to the Zone. Initially, it will be necessary to have this IBM Registration ID and password in order to apply for membership in PartnerWorld for Software. The IBM Registration captures personal data about you and is only used by PWSW for authentication purposes.



*This ID and password may take up to 15 minutes to activate.*

---

When your company's application for membership is approved, you will use the ID and password to gain access to Business Partner Zone, the Web environment exclusively for PartnerWorld for Software Business Partners.

To get your IBM Registration ID and password, go to the IBM Registration web site located at <http://www.ibm.com/registration/selfreg>, and follow the instructions listed.

### ***Creating a Business Partner Profile***

The IBM Business Partner Profile is initially created from the information submitted in the application for PartnerWorld for Software membership. The person who submits this application and thereby creates the company Profile automatically is made an *Authorized Profile Administrator*.



---

Japanese companies that already belong to Japan's PWS do not have to create a new profile. Instead, they should migrate their existing PWS profile to the PartnerWorld for Software system by enabling their profiles. To enable an existing Japanese PWS profile, see the section entitled [Enabling and Migrating a Business Partner Profile \(Japan only\)](#).

---

Use the following steps to apply for PWSW membership and create your profile:

1. Access the *PartnerWorld for Software* homepage at <http://www.ibm.com/partnerworld/software>.
2. Click the **Membership Centre** link from the menu on the left side.
3. Click **Apply for membership** from the expanded menu.
4. If you have not already done so, you will need to apply for an IBM Registration ID and Password by clicking **Register for an IBM Registration ID and password**.
5. Examine the *PartnerWorld Agreement* by performing the following:
  - a. Click **The PartnerWorld Agreement** link.
  - b. Click either of the **please click here** links. This should open a second browser window entitled *IBM PartnerWorld Agreement*.
  - c. Click the **list of countries where a signature is required** link.
  - d. If your country is listed on the table there, you will be required to print out the agreement to be signed and returned to the location indicated by your country's link. If your country is not listed, return to the previous page by clicking **Back** on your browser.
  - e. If you wish to see or print out a copy of the PartnerWorld Agreement, click on the language in which you wish to view the document.
  - f. After reading or printing the agreement, close the second browser window.
  - g. Click the **Back** button of the first browser window.
6. Click the **Steps to apply for membership** link.
7. Click the link in Step 3 labeled **PartnerWorld for Software profile**.
8. Enter your *Registration ID* and *Password* and click the **OK** button.
9. Select whether or not you want the application loaded with brief help text to explain each field in the application. Because loading the help text slows down the speed at which the pages load, the default is for this help to be turned off.
10. Click on the link of the application you wish to submit. The **Application to PartnerWorld for Software and All Initiatives** is the full application, and is the version that must be submitted to apply directly for Advanced or Premier member level. The **Basic Application for PartnerWorld for Software** is a much shorter application that only includes the minimum information needed for approval. See [Basic vs. Full Application](#) for more information on the differences between them. Both versions are also available with slight variations for Japanese companies.
11. Select your preferred date format, and click **Close this Window**. To change this selection, click **Modify Preferences** in the top left menu.

12. Complete each section of the application as instructed. Shaded fields are required. For more information on completing the application, see [Navigating the Business Partner Profile](#).
13. Submit the completed application by clicking **Submit**. Click **Exit** to leave the application without submitting the information.
14. If there are any required fields left blank, or business rules not met, a *Validation Report* or *Business Rules Validation* dialog will appear to indicate what remains to be corrected. Click on the hyperlink of the indicated field to return to that part of the application. When completed, click **Submit** to try again.
15. After the application has been submitted successfully, a confirmation number will be displayed. Record this number for future inquiries regarding your application. The *PartnerWorld for Software Membership Centre* will contact you within ten business days.
16. If applying for multiple locations, repeat Steps 7 - 15 for each location.



*Do not submit more than one application per location. If you feel there was something you wanted to add to your application after you have submitted it, wait until your initial application has been approved, and then update your profile as needed. Double submission can increase the time needed for approval, and can also increase the work needed to reconcile the two profiles.*

---

### Basic vs. Full Application

The *Basic Application* allows users to quickly submit the minimum amount of information needed to process the IBM Business World partnership application for *Member* level status. This includes the company name, contact information, one employee, whether or not to publish this profile in the Business Partner Directory or Customer Directory, a brief business description, and the business type.



*The Basic Application is much quicker and easier to submit, but only allows a company to be approved with a level status of Member. However, it is possible to apply using the Basic Application, and then after being accepted with Member status, update the Business Partner Profile so that your company may be considered for Advanced or Premier level status.*

---

The *Full Application* includes all of the basic information, but allows much more detail to be submitted. Some of the additional sections include:

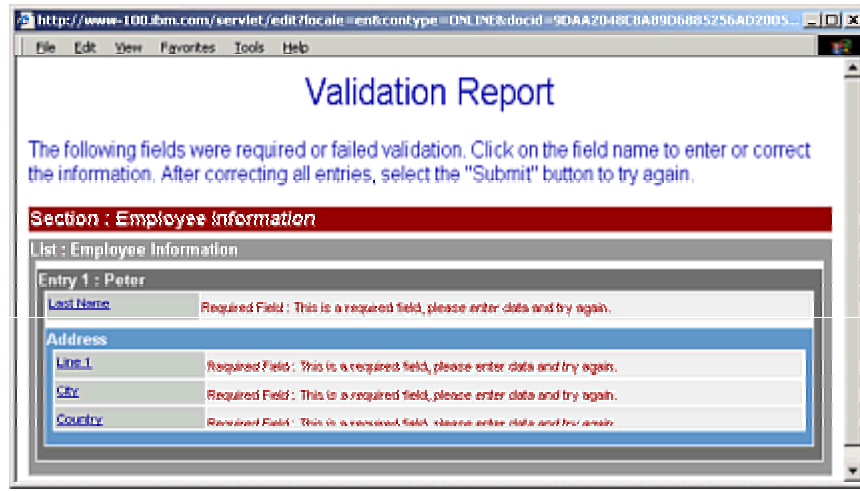
- Physical Address
- Billing Address
- Shipping Address

- Mailing Address
- Multiple Employees
- Employee Roles
- Employee Skills and Certifications
- Hardware and Software Platform
- Industry
- Services and Solutions Provided
- Reference Information

The screenshot shows the IBM PartnerWorld for Software interface. At the top, there is a search bar and navigation links for Home, Products & services, Support & downloads, and My account. The main heading is "PartnerWorld for Software". Below this, the "PWSW Profile System" section asks "How would you like to edit your profile?" with two radio button options: "Without help text loaded. (Req'd for OS/2 users)" and "With help text loaded.". A red instruction states: "Select one of the following: (Application load time estimates are: 'T1 Line' = 1 minute, '56K dialup' = 2 minutes, '28.8K dialup' = 5 minutes.)". Below this are four bullet points with links to application selection options: "Application to PartnerWorld for Software and All Initiatives (Japan only)", "Application to PartnerWorld for Software and All Initiatives", "Basic Application for PartnerWorld for Software (Japan only)", and "Basic Application for PartnerWorld for Software". The left sidebar contains navigation links for PartnerWorld for Software Home, PWSW Profile System (with sub-links for Create New Profile, Update Profile, Enable Profile, and View Pending Changes), Online Help, and Switch Locale. The footer includes links for Privacy, Legal, and Contact.

PWSW Application Selection

## Validation Report



Validation Report

The validation report is generated if required fields are left blank, or some data is out of the valid range. For each field that fails validation, the field name and problem are displayed. Click on the field name hyperlink to go directly to that field in the Profile.

The Business Rules Validation section only appears if some business rule has been violated, such as submitting a Profile without a designated Authorized Profile Administrator. These violations will need to be corrected before the Profile will be accepted. After correcting the violation, click **Submit** to try again.

## Updating a Business Partner Profile

Only the *Authorized Profile Administrator* or *Editor* can create or update the company Profile. The following steps will be necessary to update your profile:

1. Access the *PartnerWorld for Software* homepage at <http://www.ibm.com/partnerworld/software>.
2. Click the **Business Partner Zone** link from the menu on the left side.
3. Enter your Registration ID and Password at the prompt. Click **OK**.
4. If you are listed in more than one location, select the location you wish to update from the list displayed. If you are only associated with one location, you will go directly to the “Welcome” screen for the PWSW Partner Zone.
5. Click the **Update your Business Partner Profile** link listed on the right side under *Quick Links*. Alternatively, select *Profile Administration* from the *Membership Centre* menu option, and click **Update your Business Partner Profile**.
6. Within the instructions to *Update* your Business Partner profile, click the **PartnerWorld for Software Profile System** link.

7. Select whether or not you want the profile loaded with brief help text to explain each field. Because loading the help text slows down the speed at which the pages load, the default is for this help to be turned off.
8. Click the profile to update from the list displayed.
9. Update the profile as needed. For more information on how to use the Profile Editor, see [Navigating the Business Partner Profile](#).
10. When you have made all the changes needed, click **Submit**.
11. If there are any required fields left blank, or business rules not met, a *Validation Report* or *Business Rules Validation* dialog will appear to indicate what remains to be corrected. Click on the hyperlink of the indicated field to return to that part of the application. When completed, click **Submit** to try again.
12. After the profile has been submitted successfully, a confirmation number will be displayed. Record this number for future inquiries regarding the changes made.

### Assigning Employee Access Roles as APA or Profile Editor

Only *Authorized Profile Administrators (APA's)* and *Profile Editors* can update the information contained in a Business Partner Profile. The difference between the two roles is that only the APA can modify an employee's profile *Access Role*, which is what designates an employee as either an APA or Profile Editor.



*Only assign employees that you want to be able to modify the Profile as APA's or Editors.*

*Only the Authorized Profile Administrator (APA) can update the profile Access Role of an employee.*

---

Use the following steps to designate an employee as either an APA or profile Editor.

1. Follow the steps for [Updating a Business Partner Profile](#), opening the location with the employee you wish to have profile access.
2. Click **Employee Information** from the left side menu. For more information on how to use the Profile Editor, see [Navigating the Business Partner Profile](#).
3. Select the desired employee from the *Employee* drop-down list.
4. Scroll down to the *Access Role* section.
5. Ensure that the individual's ID is correctly displayed in the *IBM Registration User ID* field.
6. Select the *Profile Access* desired for this employee. The choices are either **Authorised Profile Administrator (APA)** or **Edit Access**.
7. Click the **Submit** button when all modifications have been made.

## Parts of the Profile Editor

The Profile Editor is segmented into several pages to make it easier to quickly navigate to the desired information. The pages are separated by the types of information contained within them. To go directly to a desired page, click on the selection from the menu.

### *Location Information*

This page of the Profile Editor is used for submitting such information as the company's name, address, contact numbers, and URL. There are optional sections for submitting a billing address, shipping address, and mailing address if they are different from the physical address submitted.

### *Employee Information*

This page of the Profile Editor is used for submitting information regarding employees. This includes the employee's name, title, contact information, skills and certifications, as well as roles within various initiatives and PartnerWorld for Software.



*It is very important to ensure that the Candidate ID's are entered correctly for each employee that will enroll in certification testing. It is this ID that allows IBM to associate the certification earned with the particular employee.*

---

### *General Information*

The *General Information* page includes such information as the company's IBM Customer Number, federal tax ID, the number of locations and employees. It is also where the *Enterprise ID* must be submitted if the location is part of a PWSW Multi-location Enterprise. For more information regarding Enterprise multiple locations, see [Creating an Enterprise Record for Multiple Locations](#).

### *InformixLegacy*

Companies that participate in the InformixLegacy program need to submit their InformixID on this page. All other companies may ignore this section.

### *PartnerWorld for Software Information*

This page is used to submit the *Company Description*, the *Solutions and Services Provided*, and whether or not the company should be published in the Business Partner Directory or the Customer Directory. This is also the page that displays the locations current membership level status, as well as the *Level Summary*, which outlines what requirements are still outstanding in order to advance to higher membership levels.



*Completing the information in this section fully and accurately is very important in order for the profile to be easily located by searches performed within the Business Partner Directory or Customer Directory.*

---



### *Initiatives*

This page is used to select the *Initiatives* in which a company wishes to participate. After joining an initiative, the initiative is listed as a submenu selection under *Initiatives*, allowing it to be accessed directly. See [IBM Sponsored Initiatives](#) for more information.

### *Marketing Information*

This page is used to submit such information as classifying the industry of the company, the software and hardware platforms it employs, the services and solutions it provides, and its market focus.

### *Level Criteria Information*

This page is used to submit customer reference information needed to qualify for the higher levels of membership.

## **Profile Splits**

The more employees that are listed within a profile, the longer it takes for the profile to initially load within a browser. For this reason, IBM has incorporated a method to prevent significant performance degradation.

The method is to automatically split profiles that contain more than seventy-five employees registered with PartnerWorld for Software at one location. The split profile will then have a 'main' profile subset, and 'employee' profile subsets, each with up to twenty-five employees.

The 'main' profile subset contains all the company information as well as any employees that have roles critical to the PWSW relationship, such as the *Authorized Profile Administrator* or the *Business Contact*.

The 'employee' profile subsets contain the employee information for all employees, including everyone that was not included in the 'main' profile subset. These 'employee' profile subsets are listed after the 'main' profile subset with the name of the last employee included in that split. This allows the APA to know in which subset the information of a particular employee resides, then access that employee's information quickly.



*It is important to remember that although they may appear to be multiple profile listings, they really are only one profile separated into several subsets. The employees listed in the 'main' subset will also be listed in the 'employee' subsets as well. They are the same record. Therefore, changes made to the employee information in one subset are replicated throughout the profile.*

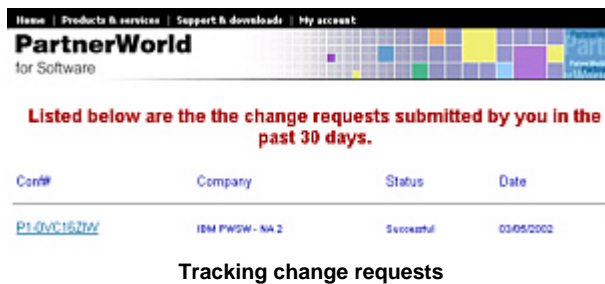
---



## Tracking the Status of Changes Made to the Business Partner Profile

Follow these steps to investigate any changes submitted to a profile within the past 30 days:

1. Access the *PartnerWorld for Software* homepage at <http://www.ibm.com/partnerworld/software>.
2. Click the **Business Partner Zone** link from the menu on the left side.
3. Enter your Registration ID and Password at the prompt. Click **OK**.
4. If you are listed in more than one location, select the location you wish to check from the list displayed. If you are only associated with one location, you will go directly to the “Welcome” screen for the PWSW Partner Zone.
5. Click the **Update your Business Partner Profile** link listed on the right side under *Quick Links*. Alternatively, select *Profile Administration* from the *Membership Centre* menu option, and click **Update your Business Partner Profile**.
6. Within the instructions to *check the status* of your Business Partner profile, click the **PartnerWorld for Software Profile System** link.
7. All the changes made to this profile in the past 30 days are displayed with a Confirmation number, Company, Status, and Date.
8. Click on the **Conf#** of the update you wish to investigate to see the specific changes made.



The screenshot shows the PartnerWorld for Software interface. At the top, there is a navigation bar with links for Home, Products & services, Support & downloads, and My account. Below the navigation bar, the text reads "Listed below are the the change requests submitted by you in the past 30 days." Below this text is a table with the following columns: Conf#, Company, Status, and Date. The table contains one row of data: Conf# P15VC167W, Company IBM PWSW - NA 2, Status Successful, and Date 03/05/2002. Below the table, the text "Tracking change requests" is displayed.

Conf#	Company	Status	Date
<a href="#">P15VC167W</a>	IBM PWSW - NA 2	Successful	03/05/2002

Tracking change requests



If you wish to discuss with the Membership Centre a change submitted, be sure to note the Confirmation number (Conf# ) of the change in question.

## **Creating an Enterprise Record for Multiple Locations**

If you have multiple locations in your organization, each location must register for PartnerWorld for Software individually. However, you can create a master record to identify them as all belonging to the same enterprise. This is called an *Enterprise Record*.

One benefit of having an enterprise record is that it gives IBM a way to view the relationships that exist among all your PWSW location establishments, and the revenue generated throughout your organization.

Another benefit of establishing an Enterprise Record is to allow locations within one geography to aggregate the qualification criteria and benefits for each membership level. This is called the *Enterprise Option*. For example, if an organization had two locations, and one of those locations had five people with certifications, and the other only had one person with a certification, then they both could potentially still become *Advanced* members because of their collective skill set.



*IBM defines the following four geographies: North America (NA), Latin America (LA), Europe, Middle East, and Africa (EMEA), and Asia Pacific (AP).*

---

The Enterprise Record can be created by any employee of an active PartnerWorld for Software location, who initially becomes the Enterprise Authorized Profile Administrator (APA). The APA would then need to coordinate with the location APAs to determine which locations would be part of the enterprise.



*The Enterprise APA may also be assigned as the APA for the individual locations. This may simplify the administration of the enterprise and the individual locations.*

---

## **Creating the Enterprise Record**

The following steps will be necessary to create the Enterprise Record:

1. Access the *PartnerWorld for Software* homepage at <http://www.ibm.com/partnerworld/software>.
2. Click the **Business Partner Zone** link from the menu on the left side.
3. Enter your Registration ID and Password at the prompt. Click **OK**.

4. If you are listed in more than one location, select the location you wish to update from the list displayed. If you are only associated with one location, you will go directly to the “Welcome” screen for the PWSW Partner Zone.
5. Click **Membership Centre** from the navigation menu on the left.
6. Click **Profile Administration** in the expanded menu.
7. Click **The Enterprise Record for Multiple Locations** link.
8. Click **Apply for an Enterprise Record** from the *Document contents* menu. This opens the *Enterprise Record for Multiple Locations* page.
9. Click **apply for an Enterprise Record**.
10. Select whether or not you want the application loaded with brief help text to explain each field in the application. Because loading the help text slows down the speed at which the pages load, the default is for this help to be turned off.
11. Click **Apply to create an Enterprise Record**. Japanese companies should select the version made specifically for them.
12. Fill in the appropriate information to complete the application.
13. In the section for *Authorized Enterprise Administrator*, click the **New** button and enter the IBM Registration ID of the person you want to be the Authorized Enterprise Administrator. You may enter more than one by clicking **New** again.
14. When you have completed the application, click **Submit** to send the application.
15. If there are any required fields left blank, or business rules not met, a *Validation Report* dialog will appear to indicate what remains to be corrected. Click on the hyperlink of the indicated field to return to that part of the application. When completed, click **Submit** to try again.
16. After the profile for the Enterprise record has been submitted successfully, a confirmation number will be displayed. You may record this number for future inquires.

### Associating Location Profiles with the Enterprise Record

After the Enterprise Record has been approved, use the following steps to associate individual locations within the enterprise:

1. Have the Enterprise Record APA follow the steps for [Updating a Business Partner Profile](#), opening the Enterprise Record profile. Make a note of the *Enterprise ID* that has now been assigned to your approved enterprise profile. This approved profile identifier number will be used in the profiles that will be a part of this Enterprise Record.
2. Have each location APA open the profiles of the locations to be included in the Enterprise.
  - a. In the Profile Editor, select the *General Information* section from the menu on the left side.
  - b. Enter the Enterprise ID in the *Enterprise ID* field.
  - c. Click **Submit**.

- d. A confirmation screen appears indicating the confirmation number for the change request. Record this number for future inquiries. Click the **Close This Window** button when finished.
3. Repeat step 2 for each location to be included within the Enterprise.



Processing time for this request will be within approximately four hours.

---

## Designating Locations to Participate in the Enterprise Option

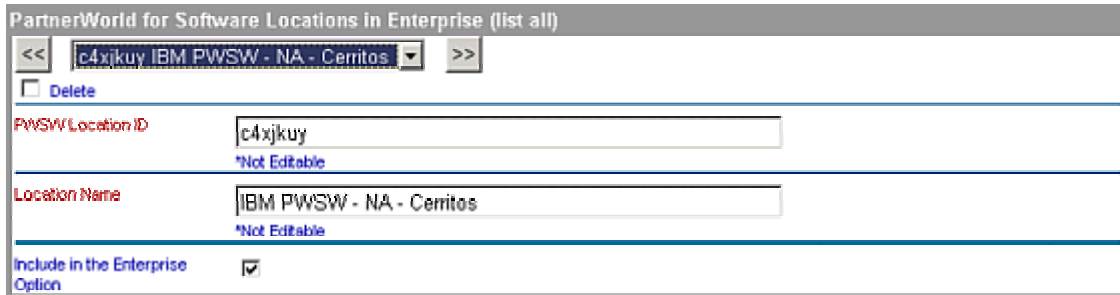
The *Enterprise Option* is available to allow your enterprise to aggregate the qualification criteria for either the *Advanced* or *Premier* membership levels among some or all of the locations that are part of your enterprise.



Within the PWSW Partnerzone, see Enterprise capabilities under the Relationship support menu option for more details regarding the Enterprise Option.

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1. After all the locations to be included have been approved as part of the organization, have the Enterprise APA follow the steps for [Updating a Business Partner Profile](#), opening the Enterprise Record profile.
2. For each location that you wish to include in the aggregation of criteria, select that location from the drop-down list, and enable the option for *Include in the Enterprise Option*.
3. After you have selected all the locations you want to include as part of the Enterprise Option, click the **Submit** button.
4. You may record the confirmation number displayed for any future inquiries regarding this change. Click the **Close This Window** button to close the confirmation screen.



PartnerWorld for Software Locations in Enterprise (list all)		
<<	c4xjkuy IBM PWSW - NA - Cerritos	>>
<input type="checkbox"/> Delete		
PWSW/Location ID	c4xjkuy *Not Editable	
Location Name	IBM PWSW - NA - Cerritos *Not Editable	
Include in the Enterprise Option	<input checked="" type="checkbox"/>	

Adding a location to be part of the Enterprise Option

## Updating an Enterprise Record

The Enterprise APA may update the Enterprise Record the same way he would update the Profile of a particular location. See [Updating a Business Partner Profile](#) for more information.

## Removing Locations from the Enterprise or from the Enterprise Option

The Enterprise APA may remove a location from participating in the Enterprise, or just the Enterprise Option by applying the following steps:

1. Have the Enterprise APA follow the steps for [Updating a Business Partner Profile](#), opening the Enterprise Record.
2. From the Enterprise Record Profile Editor, select the location to be removed.
3. To delete the record from belonging to the Enterprise, enable the *Delete* checkbox. To only remove the location from participating in the Enterprise Option, disable the *Include in the Enterprise Option* checkbox by removing the check mark.
4. Repeat steps 2 and 3 for each location you wish to remove.
5. Click the **Submit** button.
6. Record the confirmation number displayed for any future inquiries regarding this change. Close the confirmation screen by clicking **Close This Window**.

## Enabling and Migrating a Business Partner Profile (Japan only)

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Only Japanese companies with profiles that were created before March 2002 need to enable and migrate their Business Partner Profiles.

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Japan has now integrated the Software Business Partner program members into IBM's PartnerWorld for Software (PWSW) infrastructure to better serve all Business Partners and to provide you with additional and more comprehensive benefits, all within a common framework. This migration to the PartnerWorld systems makes it necessary to perform the one-time action of *enabling* your Business Partner Profile.

The following information supplements instructions that should have reached you by email, along with a sixteen-digit *Temporary Access Code* that the following instructions require you to have. If you did not receive that email memo, please contact your Membership Centre for assistance. Then return to this guide to complete the migration.

In order to enable your Business Partner Profile, you must have your browser configured to read Japanese characters.

1. Access the *PartnerWorld for Software* homepage (Japanese version) at <http://www-100.ibm.com/partnerworld/software/japan/pwswpubj.nsf>.
2. If you have not already done so, you will need to apply for an IBM Registration ID and Password by clicking **Register for an IBM Registration ID and password**.
3. Click the link from the menu on the left that translates as **Membership Centre**.
4. Under the *Membership Centre* menu, click the submenu option that translates as **Migrating to Partnerworld for 2002**.
5. Click on the first hyperlink that translates as **this**.
6. Click on the URL that appears within step 2 on that page.
7. Enter your Registration ID and Password at the prompt. Click **OK**.
8. Click **Enable Profile** from the menu on the left.
9. Enter the *Temporary Access Code* number into the four fields presented.
10. Click **Continue**.
11. **WAIT** for at least twenty minutes. This is to allow the computer servers time to process the enablement, and then replicate the data to the appropriate systems.
12. Click **Update Profile** from the menu on the left.
13. For each location to migrate into the PartnerWorld for Software program, click on the location name from the list displayed.
  - a. Click the **Initiatives** menu option on the left.
  - b. Check the *Apply for PartnerWorld for Software* checkbox. The *PartnerWorld for Software Information* menu option should now appear on the left.

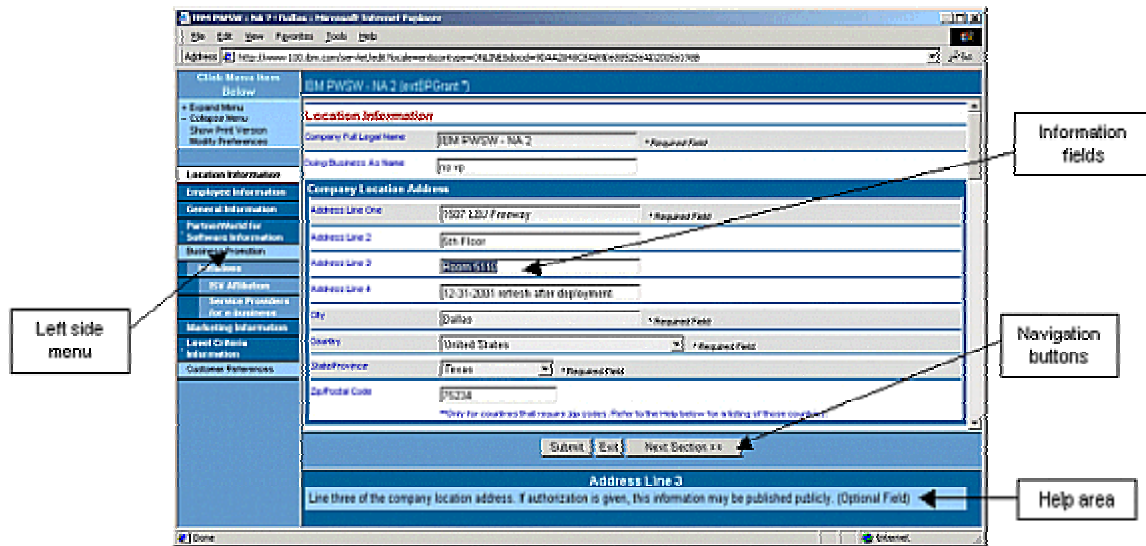
- c. Click the **PartnerWorld for Software Information** menu option.
  - d. Enter the information for the application as instructed. Shaded fields are required. For more information on completing the application, see [Navigating the Business Partner Profile](#).
  - e. Submit the completed application by clicking **Submit**. Click **Exit** to leave the application without submitting the information.
  - f. If there are any required fields left blank, or business rules not met, a *Validation Report* or *Business Rules Validation* dialog will appear to indicate what remains to be corrected. Click on the hyperlink of the indicated field to return to that part of the application. When completed, click **Submit** to try again.
  - g. After the application has been submitted successfully, a confirmation number will be displayed. Record this number for future inquiries regarding your application. The *PartnerWorld for Software Membership Centre* will contact you within ten business days.
14. If applying for multiple locations, repeat Step 13 for each location.

## Navigating the Business Partner Profile

Navigating through the Business Partner Profile is performed the same way in either Netscape Navigator or Internet Explorer. The image below displays all the basic elements of the Profile editor.



If it becomes necessary to resize the frames in the Profile editor, place the cursor over the frame until the double arrow resize icon appears, and then click and drag the frame to resize it.



Business Partner Profile Editor

### Left Side Menu

The left side menu allows you to navigate to various sections of the Profile quickly. Click on the section you wish to visit.

At the top of the left side menu, click on **Expand Menu** or **Collapse Menu** to display or hide subsections in the menu respectively.

Click the **Show Print Version** to display a printer friendly version of all the fields that have been completed in the entire Profile.

Click **Modify Preferences** to display the date format selector. This allows you to set the date format you wish to use throughout the Profile. For example, you may prefer the American date style of *mm/dd/yyyy*, or the European style of *dd/mm/yyyy*. If you decide to leave the date format unchanged, click **Close This Window**.





*By default, the date format used is imported from the browser settings of the person viewing the Profile. This eliminates the need for associates around the world to worry about which format was used to submit the information. The date format is displayed next to each date field to confirm your selected format.*

---

## Help Area

If the Profile is being viewed with text help loaded, this area displays that help. The help area updates the information displayed each time the cursor moves from field to field.

## Navigation Buttons

Clicking the << **Prev. Section** button loads the previous section of the Profile, while the **Next Section** >> button loads the Profile section that follows. These buttons are only displayed when there is a previous or next section in the Profile available.

Click the **Submit** button when all the additions or changes to the Profile have been made. All changes made will be lost if the window is closed without clicking **Submit**.

To exit the Profile without saving any changes, click **Exit**.

## Information Fields

All Profile information is displayed and modified in its corresponding information field. Click in a field to place the cursor there. You may also move forward a field by pressing the **Tab** key. Press **Shift+Tab** together to move back one field.



*Required fields are indicated by being shaded. They will also be explicitly notated as a “**Required Field**”. Attempting to submit a Profile with a required field left blank will generate a Validation Report displaying all the fields that still require data.*

---

## Using Profile Editor Controls

The PartnerWorld for Software Profile Editor uses a variety of form controls to submit and display the profile data. The following describes how to utilize each control.

Text box

Zip/Postal Code

The *text box* control allows the user to type in data directly. The text box looks like a plain rectangle. Place the cursor in the desired text box by clicking within the text box.

Drop-down list

State/Province

A *drop-down list* offers users a selection to choose from. A drop-down list looks like a text box with an inverted triangle button on the right side. Click on the button to display the selections. If the list of selections is long, you may see a scroll bar to navigate up and down the list. Click on the selection desired.



*Drop-down lists are sorted alphabetically. Another way of navigating the list is to type the first few letters of your selection directly into the drop-down list. If necessary, you may also use the up and down arrow keys of the keyboard to navigate up and down the list.*

*For example, if selecting a State/Province within the United States, entering a 'T' would display the state of 'Tennessee'. Pressing the down arrow key would then display the next state alphabetically, which would be 'Texas'.*

Checkbox

Receives Mail for this Location

A *checkbox* is a toggle control that is either on or off, true or false, enabled or disabled, as indicated by a check mark appearing in the small square box. Click on the checkbox to toggle the control on or off. Alternatively, with the checkbox selected, press the keyboard spacebar to activate or deactivate the checkbox.

Radio buttons

Without help text loaded. (Req'd for OS/2 users.)  
 With help text loaded.

*Radio buttons* offer the user a mutually exclusive choice. That is to say, choosing one option will mean that the other options are not chosen. The selection with the dot in the center of the circle is the active selection.

Display lists

\*\*Multi-Select List (press and hold the CTRL key while selecting/deselecting values)

CEO
Director
General Manager
Manager
Managing Director
President
Vice-President

A *display list* control is used to display lists where more than one selection is possible, such as *Company Roles* as depicted above. Click on the desired selection(s). To select more than one choice, hold down the **CTRL** key and click on each desired selection.

Triggers

[Click here to view the roles assigned for each person.](#)

The Profile Editor contains several hyperlink *triggers*, which generate special display pages. These triggers are displayed as bright blue text with an underline. Click on the trigger to create the targeted page.

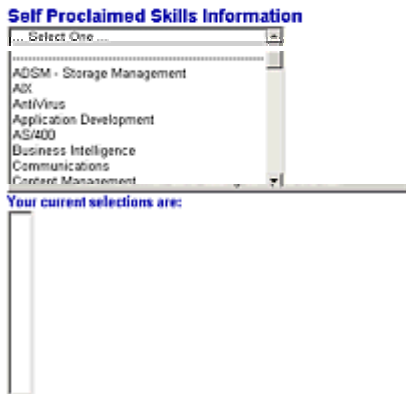
Button controls



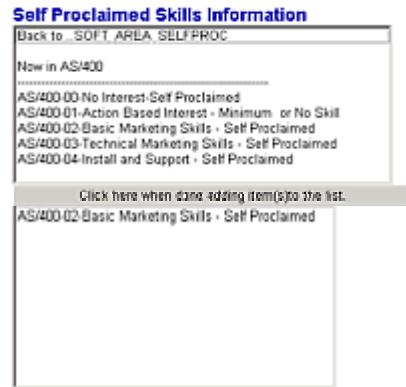
**Buttons** invite a user to activate their associated function by clicking the button control. Buttons often indicate the action they perform by displaying the action as a caption on the button, as shown on the **Add a Candidate ID** button above. Some buttons use symbols, such as the “<<” and “>>” buttons displayed above to indicate actions such as moving backwards or forwards through the list of candidate ID’s.

Hierarchical tree selection list

Some display lists, such as those that display an employee’s *Skills*, require a hierarchical selection of choices. In these cases, the user must first select the category that their selection belongs to before specifying the detailed selection, or multiple selections.



Hierarchical tree with no selections



Hierarchical tree with one selection



The box for the selected choices appears narrow and empty until selections are added.

The following example illustrated in the images above describes the steps for adding skills in the *Self Proclaimed Skills Information* section:

1. Click the button **Click here to add new items to the list.**
2. Click the desired skill category. (This example uses “AS/400”) The top box changes to show the skills within the category currently selected.
3. Click on the specific skill to be added in the top box. The skill selected is added to the list of *Your current selections are* in the bottom box, and you are returned to

the previous menu of categories. Alternatively, you may click *Back to...* to go back to the previous menu of categories without making a selection.

4. Click the button **Click here when done adding item(s) to the list** to accept the current selections, or click another category to add a skill from that category as well. Only one skill per category is allowed.
5. To delete an item from the selection list, select the item and 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 while clicking on each selection. To select multiple consecutive items, hold down the **Shift** key while clicking the first and last item within a group.

#### *View or add new entries*

Some sections are designed to allow you to view existing entry information, or add new entries to a list. To access an existing entry, click the **down arrow** of the drop-down list. You may also click the left or right arrows (<< or >>) to scroll through the list. The information displayed in the fields below correlates with the entry selected.

The following example describes adding a new employee entry to the profile:

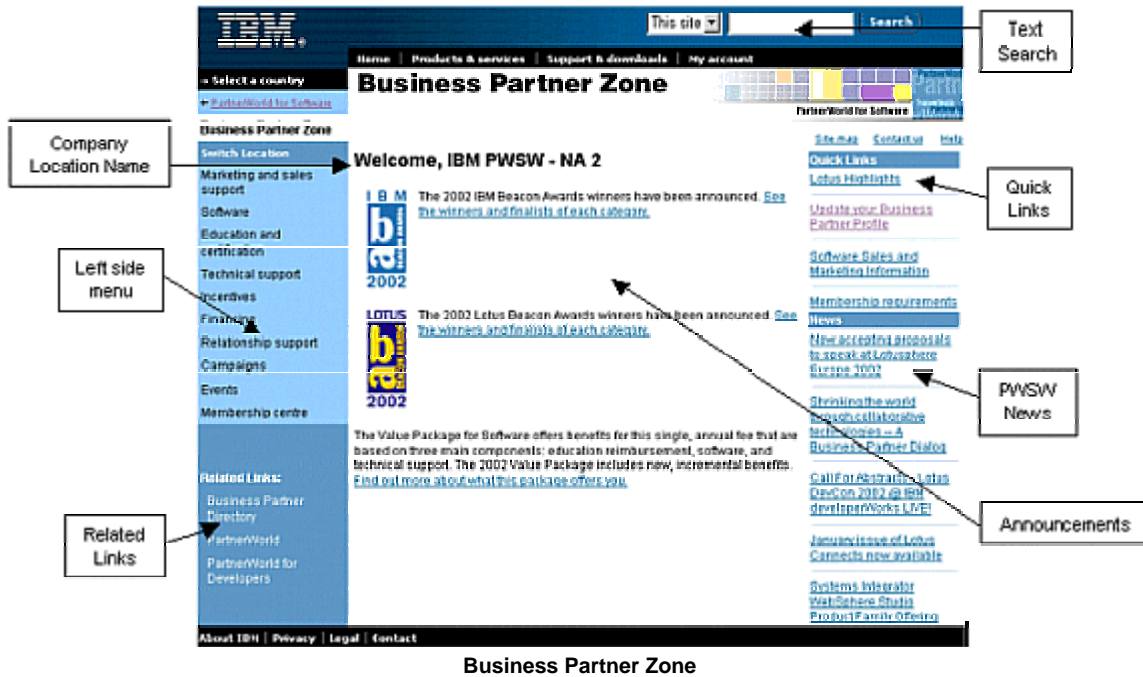
1. Click the button that allows you to add new information. In this case, the **Add an Employee Entry** button.
2. Enter the appropriate information in the fields related to this employee.
3. Repeat steps 1 and 2 for each new entry you wish to add.
4. To delete an entry, select the entry in the drop-down list, and enable the *Delete this entry* checkbox by placing a check mark in it.
5. Click **Submit** when all new entries have been made, and all entries to be deleted marked for deletion.



The screenshot shows a web form titled "Employee Information". It features a dropdown menu with "Heffner Peter" selected, flanked by left and right navigation arrows. To the right is a button labeled "Add an Employee Entry". Below the dropdown is a checkbox labeled "Delete this entry".

Add a New Entry for Employees

## Getting the most from your PWSW Partnership



PartnerWorld for Software was created to help IBM Business Partners leverage their relationship with IBM to maximize their competitive advantage in the marketplace. It does this by providing four main membership benefits:

- **Education** – Includes web-based selling guides and tools, certification roadmaps to prepare you for certification testing, and education reimbursement through the *We Pay Offerings* program.
- **Technical Support** – Includes self-help technical support, downloadable software fixes, FAQ's, sample code, voice Techline, technical mentoring, public and private Q&A, critical implementation support, and solution development and implementation support.
- **Software** – *Demo and evaluation software*, and *Run Your Business Software*.
- **Marketing and Sales Assistance** – Includes the *Signature Sales Resource*, executive assessment, software sales and marketing information, the *Business Partner Directory*, access to the *Business Partner Connections* database, the *Marketing Support Advantage*, public relations support, Sales and Marketing CD-ROM kits, and PWSW trade show booths.



The level of support received in each of these benefits is directly related to the membership level of the partner, and whether or not they have purchased the optional [Value Package for Software](#). Some benefits are only available to Advanced or Premier level business partners, and some are offered only through the Value Package for Software.

## Member, Advanced, and Premier Membership Levels

There are three levels of membership for Business Partners in the IBM PartnerWorld for Software program. Starting from the most basic, they are the *Member* level, *Advanced* level, and *Premier* level. While the benefits increase at Advanced and Premier levels, the requirements needed to qualify for each level also increase.

The Advanced and Premier levels require sponsorship by IBM Sales Management to be accepted. See [Self-Nomination for Sponsorship by IBM Sales Management](#) for details.



For detailed information regarding membership level, criteria for qualification, and a comparison of benefits, visit the Partnerzone Membership Centre. Following the link entitled "2002 Membership basics", you will find links to answer all of these questions. The most complete source for this information can be found there in the "PartnerWorld for Software 2002 Track Guide."

### A Quick Comparison of Benefits Between Membership Levels

The following is a quick side-by-side comparison of the benefits offered at the three membership levels. Items in *italics* indicate that those benefits are only available with the purchase of the Value Package. Benefits are subject to change.

<b>Member</b>	<b>Advanced</b>	<b>Premier</b>
<ul style="list-style-type: none"> <li>▪ IBM Business Partner Title</li> <li>▪ Web-based Signature Sales Resource</li> <li>▪ Executive Assessment</li> <li>▪ Campaign Designer</li> <li>▪ Business Partner Connections</li> <li>▪ Listing in SW Directory</li> <li>▪ Web-based Selling Guides &amp; Tools</li> <li>▪ Web-based Self-help Tech Support</li> <li>▪ IBM Global Financing</li> <li>▪ Membership Centre Hot Line</li> <li>▪ Business Partner Communications</li> <li>▪ <i>We Pay Offerings – \$3K Cap</i></li> <li>▪ <i>TechLine (Pre-sales Tech Support)</i></li> <li>▪ <i>Q&amp;A Forums for Tech Support</i></li> <li>▪ <i>Demo and Evaluation Software</i></li> <li>▪ <i>Run Your Business Software Licenses for Internal Business Use</i></li> <li>▪ <i>Sales and Marketing CD-ROM Kits</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ IBM Business Partner Emblem &amp; Plaque</li> <li>▪ IBM e-business mark</li> <li>▪ Field Sales or Telesales Contact</li> <li>▪ Business &amp; Mktg. Plan Development</li> <li>▪ <i>We Pay Offerings - \$9K Cap</i></li> <li>▪ <i>Technical Mentoring</i></li> <li>▪ <i>Trade Show Booths</i></li> <li>▪ <i>Marketing Support Advantage</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ Sales Mentoring</li> <li>▪ <i>We Pay Offerings - \$50K Cap</i></li> <li>▪ <i>Critical Implementation, Onsite Tech Support</i></li> <li>▪ <i>Private Q&amp;A Tech Support</i></li> <li>▪ <i>Public Relations Support</i></li> </ul>

## Determining Eligibility for Advanced and Premier Membership

Based on your company's Business Partner Profile, your company's eligibility for Advanced or Premier membership may be quickly ascertained, as well as determining which requirements, if any, still need to be met.



*Beginning in 2002, the eligibility requirements have changed significantly from previous years. Please review the 2002 PartnerWorld for Software Track Guide located on the 2002 Membership basic page of the Membership Centre for details.*

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1. Access the *PartnerWorld for Software* homepage at <http://www.ibm.com/partnerworld/software>.
2. Click the **Business Partner Zone** link from the menu on the left side.
3. Enter your Registration ID and Password at the prompt. Click **OK**.
4. If you are listed in more than one location, select the location you wish to update from the list displayed. If you are only associated with one location, you will go directly to the "Welcome" screen for the PWSW Partner Zone.
5. Click the **Update your Business Partner Profile** link listed on the right side under *Quick Links*. Alternatively, select *Profile Administration* from the *Membership Centre* menu option, and click **Update your Business Partner Profile**.
6. Within the instructions to *Update* your Business Partner profile, click the **PartnerWorld for Software Profile System** link.
7. Select whether or not you want the profile loaded with brief help text to explain each field. Because loading the help text slows down the speed at which the pages load, the default is for this help to be turned off.
8. Click the profile to examine from the list displayed.
9. Click the **PartnerWorld for Software Information** menu item on the left side.
10. Click the hyperlink in the *Level Summary* entitled **Click here to view your Benefit Level Summary**.
11. This printer-friendly report displays the requirements that still need to be met in order to qualify for the Advanced or Premier membership levels.

## Self-Nomination for Sponsorship by IBM Sales Management

In order to be accepted as an *Advanced* or *Premier* member, your company must obtain sponsorship by IBM Sales Management. Companies may nominate themselves for sponsorship after they have met all the criteria needed to qualify for the desired membership level. For more information regarding the criteria needed to qualify, refer to the *2002 PartnerWorld for Software Track Guide* located on the *2002 Membership basic* page of the *Membership Centre*.





Before submitting your location for sponsorship, be sure the location Profile has been updated with the latest information, including certifications held, revenue, and customer references. This information is used to determine eligibility for the Advanced and Premier membership levels.

---

1. Access your *Business Partner Zone*.
2. Click on the **Membership Centre** menu item to expand the menu.
3. Click on the **2002 Membership basics** link.
4. Click the link [**Advanced** or **Premier**] **level nomination for sponsorship**.
5. Read the instructions, and click **submit here** if you meet all of the requirements.
6. Record the confirmation number displayed for future inquiries regarding your sponsorship application.

### Checking the Status of Your Nomination

If your company has already been approved for PartnerWorld for Software, but has now nominated itself to upgrade its membership level, you may check the status of your nomination within your Business Partner Profile.

1. Enter the Business Partner Profile by following the steps for [Updating a Business Partner Profile](#).
2. Click on the **PartnerWorld for Software Information** menu option.
3. Scroll to the *2002 Sponsorship* section at the bottom of the window. The status of the nomination is noted in the *Status* field.

### Value Package for Software

The *Value Package for Software* is an optional benefit of IBM PartnerWorld for Software that has been developed to offer Business Partner benefits above and beyond the core, no-cost benefits available to PartnerWorld for Software Business Partners. This package may be purchased as an annual subscription.

The degree to which a Business Partner benefits from the Value Package offerings is determined by their membership level. The Value Packages at the higher membership levels contain progressively more benefits than the packages at the lower levels. See [A Quick Comparison of Benefits Between Membership Levels](#) for a summary listing of Value Package benefits.



## Employee Value Package Roles for Software Ordering

The ability to pay for the Value Package for PWSW, or to order and download software as a benefit of the Value Package, must be specifically assigned to the employee(s) of the location. This may only be accomplished by an *Authorized Profile Administrator* or *Profile Editor*.

1. Follow the steps for [Updating a Business Partner Profile](#), opening the location of the employee profile record to modify.
2. Click **Employee Information** from the left side menu.
3. Select the desired employee from the *Employee* drop-down box.
4. Scroll down to the *Access Role* section.
5. Ensure that the individual's ID is correctly displayed in the *IBM Registration User ID* field.
6. Select the desired *Value Package Role* for the employee.
  - **Purchase Value Package and Order Software CD's** – This option allows the employee to purchase the Value Package, order software CD's, and download software electronically (must have purchased the Value Package to download or order software.)
  - **Software Download** – This option only allows the employee to download software electronically (must have purchased the Value Package to download software.)
7. Click the **Submit** button.
8. Record the confirmation number displayed for future inquiries regarding the changes made to the Profile.

## How to Order the Value Package

After an employee has been assigned the *Purchase Value Package and Order Software CD's* role as described in the preceding section, they may purchase the Value Package for that location.



*Value Packages only apply to the one location from which they were purchased.*

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1. Enter the *Business Partner Zone* for the desired location.
2. Click the **Value Package for Software** link from the *Membership Centre* menu. Note that this option is only available within the zone, and is not listed under *Membership Centre* in the public area of PWSW.
3. Click the **Purchase Value Package for Software for 2002** link.
4. Click the **purchase the Value Package for Software** link. This may take a few moments to load the catalog.
5. Check the *Select* checkbox for *PartnerWorld for Software Value Pack 2002*.

6. Click the **Add to Cart** button.
7. Enter or edit the *Shipping and Billing Address* and *Payment Information* fields if necessary.
8. Click the **Order Direct** button.
9. Click the **Next Step** button after confirming the shipping information.
10. Click the **Next Step** button after confirming the payment information.
11. Click the **Create Order** button.

## **IBM Sponsored Initiatives**

There are several *Initiative* programs offered through PartnerWorld for Software that are designed to offer added incentive for partners to excel. Details regarding the initiatives currently offered may be found in the Business Partner Zone within the *Membership Centre*.

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

Applying for various initiatives is accomplished by updating the location profile. Therefore, only the location's APA or Profile Editor may apply for the initiative.

1. Follow the steps for [Updating a Business Partner Profile](#), opening the location for which you wish to apply for Initiatives.
2. From the menu on the left, click **Initiatives** listed below the *Business Promotion* menu item.
3. From the list of initiatives presented, check the checkbox of the initiative you wish to apply for. Some initiatives require additional confirmation or information to be submitted for approval. Each initiative you add is added below the *Initiatives* menu on the left.
4. Under the *Initiatives* menu option, click on the initiative's name to open the new profile section for that initiative. Fill in the required fields and other pertinent information for the initiative.
5. Click the **Submit** button.
6. Record the confirmation number displayed for future inquiries regarding the changes made to the Profile.

### **The LAEC Initiative**

The *Lotus Authorized Education Center (LAEC)* initiative is for independent software training companies that provide technical and certification-based training on Lotus products. LAECs provide end user and custom training on Lotus products to complement their offerings. Through this initiative, Lotus delivers quality education services to customers throughout the world.

Selection is based on proven excellence in training, available facilities and equipment, instructor expertise, and geographic coverage. LAECs must use networked classroom facilities that meet Lotus' equipment requirements, use Lotus Authorized Courseware for all relevant course offerings, and employ a Certified Lotus Instructor (CLI).

For more information, click the **LAEC Initiative** under the *Membership Centre* menu within the Business Partner Zone.

### **The xSP Prime for Service Providers Initiative**

Whether your company is an Internet Service Provider (ISP), Hosting Provider, or Application Service Provider (ASP), the IBM *xSP Prime for Service Providers* initiative is designed to help various types of service providers deploy advanced applications and enter new markets through access to IBM technology, education, technical support, Joint Marketing Planning, and marketing development funds (MDF).

For more information, click the **xSP Prime for Service Providers initiative** link under the *Membership Centre* menu within the Business Partner Zone.

### **The TCI zSeries MLC Initiative**

The *Top Contributor Initiative (TCI) zSeries Monthly License Charge (MLC)* program allows qualified Business Partner firms to be compensated for pre-installation marketing and sales efforts resulting in IBM software sales. This program was formerly known as IBM and Lotus Sales Assistance Program (ILSAP). In order to participate in this initiative, your organization must first apply for the initiative, and then track each potential customer and sales opportunity for which you wish to be compensated.

#### *Applying for the TCI zSeries MLC Initiative*

Applying for the TCI zSeries MLC initiative is performed by updating the location Business Partner Profile. Therefore, only the location's APA or Profile Editor may apply for the initiative.



*You must be approved for the TCI zSeries MLC initiative before you are eligible for submitting customers and opportunities for compensation. For more details regarding the TCI zSeries MLC program, contact the Membership Center.*

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1. Access the *PartnerWorld for Software* homepage at <http://www.ibm.com/partnerworld/software>.
2. Click the **Business Partner Zone** link from the menu on the left side.
3. Enter your Registration ID and Password at the prompt. Click **OK**.

4. If you are listed in more than one location, select the location for which you wish to apply from the list displayed. If you are only associated with one location, you will go directly to the “Welcome” screen for the PWSW Partner Zone.
5. Click the **Update your Business Partner Profile** link listed on the right side under *Quick Links*. Alternatively, select *Profile Administration* from the *Membership Centre* menu option, and click **Update your Business Partner Profile**.
6. Within the instructions to *Update* your Business Partner profile, click the **PartnerWorld for Software Profile System** link.
7. Select whether or not you want the profile loaded with brief help text to explain each field. Because loading the help text slows down the speed at which the pages load, the default is for this help to be turned off.
8. Click the profile to which you wish to add this initiative from the list displayed.
9. Click **Initiatives** from the menu on the left side.
10. Click the checkbox for **Apply for the TCI zSeries MLC Program**. The *Initiatives* menu option should expand to display the *Sales Assistance Program Information*.
11. Click on the **TCI zSeries MLC Program Information** menu option.
12. Enter the appropriate information down through the *Eligible Product Categories* section.
13. Click the **Submit** button.
14. Record the confirmation number displayed for future inquiries regarding the changes made to the Profile.

#### *Submitting a Customer and Opportunity for Compensation*

After a location has been approved for the TCI zSeries MLC program, you may begin to submit potential customers and opportunities for the program.



*To avoid the inefficient use of the Authorized Profile Administrator's (APA's) time, only submit those prospective customers that are reasonably likely to result in sales. For example, submitting every company when they are first cold-called would probably be an extremely inefficient use of their time and resources.*

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Potential opportunities must be submitted at least fifteen days prior to any request for payment. After an opportunity has been submitted, there is only a 90-day window in which to close the sale to receive credit for the TCI program. You may apply for a one-time 90-day extension, if necessary.

Submitting potential customers and opportunities is accomplished by updating the location Business Partner Profile after the location has been approved for the initiative. Therefore, only APA's and Profile Editor's may submit customers and opportunities for this initiative.

1. Access the *PartnerWorld for Software* homepage at <http://www.ibm.com/partnerworld/software>.
2. Click the **Business Partner Zone** link from the menu on the left side.
3. Enter your Registration ID and Password at the prompt. Click **OK**.
4. If you are listed in more than one location, select the location you wish to update from the list displayed. If you are only associated with one location, you will go directly to the “Welcome” screen for the PWSW Partner Zone.
5. Click the **Update your Business Partner Profile** link listed on the right side under *Quick Links*. Alternatively, select *Profile Administration* from the *Membership Centre* menu option, and click **Update your Business Partner Profile**.
6. Within the instructions to *Update* your Business Partner profile, click the **PartnerWorld for Software Profile System** link.
7. Select whether or not you want the profile loaded with brief help text to explain each field. Because loading the help text slows down the speed at which the pages load, the default is for this help to be turned off.
8. Click the profile to which you wish to submit a potential customer or opportunity from the list displayed.
9. Click the **TCI zSeries MLC Program Information** menu option on the left.
10. Click the **Add Customer** button in the *Customer Information* section.
11. Enter the appropriate information in the *Customer Information* section, including all required fields.
12. With that customer displayed, click the **Add New Opportunity** button in the *Customer Opportunity* section.
13. Enter the appropriate information for the opportunity to be submitted.
14. Click the **Submit** button.
15. Record the confirmation number displayed for future inquiries regarding the changes made to the Profile.

#### *Requesting the One-time 90 Day Extension on an Opportunity*

After an opportunity has been submitted, there is only a 90-day window in which to close the sale to receive credit for the TCI program. You may apply for a one-time 90-day extension, if necessary.

1. Follow the steps for [Updating a Business Partner Profile](#), opening the location of the customer profile record to modify.
2. Click the **TCI zSeries MLC Program Information** menu option.
3. Scroll down to the *Customer Opportunity* section.
4. Check the *Request Extension* checkbox.
5. Click the **Submit** button.

#### *Requesting Payment on a TCI zSeries MLC Program Sale*

After a sale has been completed on an approved opportunity, a request for payment must be made in order to receive compensation through the initiative.



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Potential opportunities must be submitted at least fifteen days prior to any request for payment. After an opportunity has been submitted, there is only a 90-day window in which to close the sale to receive credit for the TCI program. You may [apply for a one-time 90-day extension](#), if necessary. In addition, the request for payment on any sales must be made within four months of the First Date of Charge (FDOC).

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Submitting request for payment on a closed sale is accomplished by updating the location Business Partner Profile. Therefore, only APAs and Profile Editors may request payment through this initiative.

1. Access the *PartnerWorld for Software* homepage at <http://www.ibm.com/partnerworld/software>.
2. Click the **Business Partner Zone** link from the menu on the left side.
3. Enter your Registration ID and Password at the prompt. Click **OK**.
4. If you are listed in more than one location, select the location you wish to update from the list displayed. If you are only associated with one location, you will go directly to the “Welcome” screen for the PWSW Partner Zone.
5. Click the **Update your Business Partner Profile** link listed on the right side under *Quick Links*. Alternatively, select *Profile Administration* from the *Membership Centre* menu option, and click **Update your Business Partner Profile**.
6. Within the instructions to *Update* your Business Partner profile, click the **PartnerWorld for Software Profile System** link.
7. Select whether or not you want the profile loaded with brief help text to explain each field. Because loading the help text slows down the speed at which the pages load, the default is for this help to be turned off.
8. Click the profile to which you wish to submit a potential customer or opportunity from the list displayed.
9. Click the **TCI zSeries MLC Program Information** menu option on the left.
10. Select the appropriate customer from the *Customer Information* drop-down list.
11. Select the appropriate opportunity from the *Customer Opportunity* drop-down list.
12. Enter the appropriate information regarding the sale in the *Payment Request* section.
13. Click the **Submit** button to submit the request.
14. Record the confirmation number displayed for future inquiries regarding the changes made to the Profile.

#### *Profile Splits for Customers and Opportunities*

The more customers and opportunities that are listed within a profile with the TCI zSeries initiative, the longer it takes for the profile to initially load within a browser. For this reason, IBM has incorporated a method to prevent significant performance degradation.



The method is to automatically split profiles that contain more than seventy-five customers or more than seventy-five opportunities into profile subsets. The split profile would then have a 'main' profile subset, and profile subsets for the 'customers' or 'opportunities' registered in the initiative. Each subset would contain no more than twenty-five customers or opportunities.

The profile subsets are listed with the company's location name followed by the prospective customer's business name. For more information, see [Profile Splits](#).

## ***Tips and Suggestions***

One of the best ways to ensure your company gets the most out of their PartnerWorld for Software relationship is to speak with an IBM PWSW representative. They can review your participation within the program, and advise you how best to proceed. To locate the correct contact number for PartnerWorld for Software in your location, click on the **Contact us** link at the top right of the PartnerWorld for Software home page. Note that this links to a different set of contact numbers than the *Contact* link at the bottom of the page, which is the contact information for IBM in general.

The following are a few suggestions for ways to maximize your PWSW relationship:

- Purchase the *Value Package for Software*, and take advantage of the educational reimbursement program. This benefit alone recoups the cost of the package.
- Keep your Business Partner Profile up to date with accurate and complete information. This information determines eligibility for membership levels, and is also used by potential customers and business partners in the *Business Partner Directory*. See [Maximizing your Visibility in the Business Partner Directory](#) and [Finding Strategic Partners in the Business Partner Directory](#) for more information.
- Make an effort to achieve the *Advanced* and *Premier* membership levels. The benefits of PWSW and the Value Package greatly increase with the higher levels.
- Examine whether any of the PartnerWorld *Initiatives* would benefit your company. Initiatives may be found in the Business Partner Zone within the *Membership Centre*.
- If you have multiple locations, create an *Enterprise Record*, and take advantage of the Enterprise Option so that the multiple locations can aggregate the criteria for qualifying for the higher membership levels.
- If you have multiple locations covered by an *Enterprise Record*, consider having the Enterprise APA also be the APA of the individual locations. This may simplify profile administration, as well as establish someone in your organization that is particularly adept at working with the Business Partner Profile editor and PartnerWorld for Software program.
- If you are at the *Advanced* or *Premier* levels, utilize your relationship with your IBM Sales Management Sponsor. They are there to help you succeed, and are the best source for advising you on how to maximize your PWSW relationship.

## Maximizing your Visibility in the Business Partner Directory

The *Business Partner Directory* lists those partners that have opted to include their information for potential customers or strategic partners to find.

The key to increasing your visibility within the PartnerWorld community is to ensure that your Profile has been kept updated accurately and fully. A lookup in the Business Directory can be performed using one or more search criteria. For example, a lookup might be performed for a particular 'Industry', 'Service' provided, or 'Solution' offered. It is therefore vital that the company Profile contains the information that might be searched for by potential strategic partners.



*In order for your company Profile to be visible to potential business partners or customers, ensure that you have selected 'Yes' on the field Publish Information to Other Business Partners, as well as the Publish Information to Customers field.*

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## Finding Strategic Partners in the Business Partner Directory

To locate potential strategic partners within the IBM Business Partner community, access the Business Partner Directory. The directory may be accessed by clicking on the *Business Partner Directory* link located in the *Related Links* section of the menu on the PartnerWorld for Software homepage.

1. Specify the target country to search. If searching within the United States, a specific state may be specified.
2. Specify criteria in one or more search parameters.
3. Click the **Find an IBM Software Partner** button to submit the query.



*Wildcard characters may be used if searching by Company Postal Code or by Company Name. Use the percent character ("%") as a placeholder for multiple characters, and the question mark character "?" as a placeholder for single characters. For example, submitting "75%" in the Company Postal Code field and "C%" in the Company Name field would return all Business Partners with zip codes that began with "75" regardless of what numbers followed, and names beginning with the letter "C".*

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## Frequently Asked Questions (FAQ)

The following are some of the questions most frequently asked by IBM Business Partners, as well as their answers, or at least where to find the answers.

- 1. How do I get started with PartnerWorld for Software (PWSW)?** – This user's guide walks potential business partners through the steps needed to join PWSW. Follow the steps in this guide, beginning with [The Business Partner Profile](#).
- 2. I qualified as a Premier PWSW Business Partner last year. Now I am told that I only qualify with a Member status. What happened?** – Beginning with January 2002, the requirements needed to qualify for *Advanced* and *Premier* membership levels were raised in order to increase the value perceived by potential customers in dealing with those companies that obtained those higher levels. As an added incentive for obtaining the higher levels of membership, the benefits offered at those higher levels have also been greatly increased.

See the *2002 PartnerWorld for Software Track Guide* for detailed information regarding the changes introduced, and the new requirements for qualifying at the higher levels. The *Track Guide* is located online in the *Business Partner Zone* on the *2002 Membership basic* page of the *Membership Centre*.

- 3. If my company has multiple locations, how would I best apply my PWSW benefits throughout my organization?** – Companies that have multiple locations should read [Creating an Enterprise Record for Multiple Locations](#) to get the best value from their PWSW membership.
- 4. Is the Value Package for Software really necessary?** – PartnerWorld for Software highly recommends purchasing the Value Package. Having the package greatly increases the benefits offered to partners above those core benefits available with the basic program. Benefits increase greatly with the higher levels of membership. However, even *Member* level business partners would find that taking advantage of the education reimbursement benefit alone covers the cost of the package. See [Value Package for Software](#) for more information regarding the package and the benefits it offers.
- 5. How do I modify my Business Partner Profile?** – Only an *Authorized Profile Administrator (APA)* or *Profile Editor* may update the information contained within a company's profile. To learn how to assign an employee to be an APA or Profile Editor, see [Assigning Employee Access Roles as APA or Profile Editor](#). To see the steps outlining how to modify the profile, see [Updating a Business Partner Profile](#). To see where in the profile the various fields of information are kept, see [Parts of the Profile Editor](#). To learn how to navigate through the Profile Editor environment, see [Navigating the Business Partner Profile](#).



## Glossary

### A

**Advanced Level** – This is the second tier of IBM’s three tier Business Partner levels. It entitles members to more benefits than those at the *Member Level*, yet not as many as offered at the *Premier Level*. Applicants for advanced status must meet certain requirements in order to be accepted. These requirements include having certain skills and certifications, references, and an IBM Sales Sponsor.

**Authorised Profile Administrator** – [Note: English spelling] This is the person who has been assigned the role of maintaining a company’s Business Partner profile. They are responsible for ensuring that the data contained within the profile is complete and accurate. They document in the profile all the certifications held by the employees, the marketing and industry data, and the contact information for the company.

### B

**Business Partner** – Companies that incorporate IBM solutions in their industry, who have accepted the PartnerWorld agreement, and who have enrolled in one or more PartnerWorld program tracks, such as PartnerWorld for Software.

**Business Partner Directory** – The BPD is an online resource for finding IBM Business Partners. Potential partners may be searched by geographical location, industry, service provided, or solutions offered.

**Business Rules Validation** – This dialog only appears when a profile has been submitted that violates a required business rule, such as mandating that all profiles have an Authorized Profile Administrator.

### C

**Candidate ID** – The Candidate ID is a unique ID issued by a certification testing center. It allows the employees to receive credit for certification exams.

### D

### E

**Enterprise Option** – At the discretion of the Enterprise Profile Administrator, individual locations within a shared enterprise may aggregate their qualifications in order to meet the requirements of becoming an *Advanced* or *Premier* member.

**Enterprise Record** - When an organization has multiple locations that are related to each other, an Enterprise Record may be created to serve as the master record

for the organization as a whole. The individual locations are then considered child records of the enterprise.

## **F**

## **G**

## **H**

**Hyperlink** – Text that reacts when clicked with a mouse. Usually redirects the user to another section of text, another web page, or accesses some file. Often identified by being a different color than the normal text, and underlined.

## **I**

**ILSAP** – The initiative known as IBM and Lotus Sales Assistance Program (ILSAP) has been renamed as the TCI zSeries MLC program. Please see that initiative for more details.

**Initiatives** – Optional programs offered by IBM to provide Business Partners with extra incentives for successful performance. Initiatives include LAEC, xSP Prime for Service Providers, and the TCI zSeries MLC program.

## **J**

## **K**

## **L**

## **M**

**Member Level** – The most basic IBM Business Partner level.

**Membership Centre** – The customer service point of contact for PWSW Business Partners.

## **N**

## **O**

## P

**PartnerWorld** – The worldwide program for IBM Business Partners. Includes the PartnerWorld for Software track as one of its primary forms.

**PartnerWorld for Developers** – A program for IBM Business Partners that are themselves developers.

**PartnerWorld for Software** – A program for IBM Business Partners that utilize or incorporate IBM software solutions within their products and services.

**Premier Level** – This is the highest level Business Partner relationship offered by IBM, and offers the most benefits to its members. Applicants for premier status must meet certain requirements in order to be accepted. These requirements include having certain skills and certifications, references, and an IBM Sales Sponsor.

**Profile** – A Business Partner Profile contains a company's contact information, skills and certifications, industry and solutions provided, and markets targeted. If the company desires, this information may be available on the Business Partner Directory as well as customer directories. This information is also needed by IBM to be certified as an Advanced or Premier Business Partner.

## Q

## R

## S

## T

**Top Contributor Initiative (TCI)** – Initiatives based upon rewarding exceptional sales performance.

## U

## V

**Validation Report** – This report is generated whenever a Profile has been submitted that contains required fields that have been left blank, or data that is not within the valid range for that field. See [Validation Report](#).

**W**

**X**

**Y**

**Z**