



**Rational**® software

# Electronic Service Request (ESR)

## Quick Reference Guide

Spring 2006

### Contents

---

<b>ESR OVERVIEW .....</b>	<b>1</b>
<b>ESR TOOL URL .....</b>	<b>2</b>
<b>BEFORE USING ESR TO SUBMIT/TRACK PROBLEMS .....</b>	<b>2</b>
<b>ENABLING ACCESS TO ESR .....</b>	<b>2</b>
<b>WHO IS THE PSTC? .....</b>	<b>2</b>
<b>HOW TO ADD AN AUTHORIZED CALLER/USER.....</b>	<b>3</b>
<b>PROBLEM TICKET (PMR) ESCALATION PROCEDURE:.....</b>	<b>3</b>
<b>ESR LINKS .....</b>	<b>4</b>
<b>RELATED LINKS .....</b>	<b>4</b>
<b>ESR CONTACT DETAILS.....</b>	<b>4</b>

### ESR Overview

Electronic Service Request (ESR) is IBM's electronic problem submission tool to be used by software customers with an active support contract. Use ESR to create PMRs (Problem Management Records) to report issues you are having while installing or using IBM software. After submitting the PMR, an IBM representative will review it and then work with you to resolve the issues.

With ESR, you can:

- Submit and manage Problem Management Records (PMRs) on demand: 24 hours a day, seven days a week, 365 days a year.
- Attach files to your PMR.
- Describe your software problem and environment in your own words.
- Monitor and update all open PMRs relative to a given IBM customer number regardless of whether the PMRs were opened by phone or by the ESR tool.
- Receive notification via e-mail when an update has been made to your PMR.
- View closed PMRs.
- Create custom reports in spreadsheet format and download them.
- Manage your ESR Authorized Caller/User lists (only available to Primary Site Technical Contacts (PSTCs) and Secondary Site Technical Contacts (SSTCs)).

- Update your ESR profile, including your name, e-mail, phone numbers, time zone, e-mail notification preferences, and the language for the e-mail notification.

**ESR tool URL:**

[https://www.ibm.com/software/support/ecare/support\\_login.jsp](https://www.ibm.com/software/support/ecare/support_login.jsp)

**Before using ESR to submit/track problems**

1. Have a valid software support contract (IBM Customer Number (ICN) is required),
2. Are registered with IBM. (Please use following URL to register - <https://www-111.ibm.com/software/support/ecare/register?action=register> ), and
3. Are listed as an Authorized Caller/User in ESR (See section: Enabling access to ESR).

**Enabling access to ESR**

There are two ways customers can request access to the ESR tool,

1. The customer provides his/her IBM ID to their PSTC.
  - Before using the ESR tool, a customer has to be granted access by his/her PSTC. Once the customer has provided their PSTC with his/her IBM ID, the PSTC can then grant access to that person.
  - Once the PSTC enters the new ESR user's IBM ID as an Authorized Caller/User, a welcome e-mail will be sent to the new user, (and a copy will be sent to the PSTC), that contains instructions on how to access ESR. If you do not receive this e-mail, contact your PSTC to ensure that you were added as an Authorized Caller/User.
  - The new ESR user will be able to submit and track problems once granted access. For details on PSTC see section: "Who is PSTC?"
2. User submits a "Caller Self-Nomination form"
  - The user can log into the ESR tool using IBM ID/password. After logging into the ESR tool, the user can submit or track problems (if granted access in step #1 above). If user has not been granted access to ESR, the user is presented with the "Caller Self-Nomination form", when attempting to submit/track a problem.
  - This form requires the new user to feed in their IBM Customer Number (ICN), among other details. Once the user completes and submits this form, their PSTC receives a request via email. Their company's PSTC may then grant or deny access to this particular user.

**Who is the PSTC?**

- The PSTC (Primary Site Technical Contact) is a contact from a customer's organization and is nominated by the customer company in the Passport Advantage (PPA) contract (See contract document titled "PPA Welcome Letter"). The PSTC is also sent a separate document titled "PA Support Letter" with details on items such as the IBM Customer Number (ICN), Passport Advantage Agreement Number and Site Number, etc.

- When the PPA contract is processed, the contact nominated as a PSTC receives a "Welcome Email" with a unique URL and details about accessing the ESR website. The PSTC uses this email to enable access to ESR tool. Only after the PSTC has enabled access to the ESR tool can he/she grant/manage access for other users in his/her organization. The unique URL in "Welcome Email" is valid for 10 days. The customer should contact ESR Customer Service - <http://www.ibm.com/software/support/help-contactus.html> - if you have a problem using this URL or for any matters regarding access to ESR tool.
- If you are the PSTC and are directed to the Caller Self-Nomination form when trying to submit/track problems, do not fill out the form. Access ESR the first time by using the URL in the ESR "Welcome e-mail".
- For help determining the name of your PSTC, please use the Customer assistance form - <https://www-111.ibm.com/software/servlet/CustAssist?topic=esr> - to contact the IBM ESR help desk for assistance.

### **How to add an Authorized Caller/User**

The PSTC enables access to online technical support in ESR by performing these steps:

- Obtain the user's IBM ID that was created during IBM registration.
- Sign in to ESR using his/her IBM ID and password.
- Click Site technical contact administration link located at the left of the page.
- Select the appropriate contract from the drop down list and then click Display caller list.
- Click Add new caller.
- Enter the caller's IBM ID.
- Select the caller type:
  - Authorized Caller (has the ability to submit/track PMRs)
  - Secondary STC (SSTCs will not see this selection as they cannot add other SSTCs but they can add Authorized Callers/Users and submit/track PMRs)
- Click Add caller

### **Problem ticket (PMR) Escalation procedure:**

After customer submits problem online or via phone if at any point in the service process, customer expectations are not met by IBM, customer may:

- Raise the Severity Level of the problem (ensuring a PMR has actually been raised for the issue) and inform the Support engineer of the sensitivity of this situation.
- If customer expectation not addressed in step #1 call the local support number and ask for a "Duty Manager" available WW 24x7. The Duty Manager will work with technical staff to ensure customer expectations are met and that customer request is being handled appropriately.
- If for some reason the above actions fail to satisfy, and the situation warrants further action, then ask the IBM Account team to raise a Critical Situation.

## **ESR Links**

ESR: Actual tool

[https://www.ibm.com/software/support/ecare/support\\_login.jsp](https://www.ibm.com/software/support/ecare/support_login.jsp)

ESR: Overview

<http://www.ibm.com/software/support/help.html>

ESR: How to use ESR

<http://www.ibm.com/software/support/help-esr.html>

ESR: FAQ

<http://www.ibm.com/software/support/help-faq.html>

ESR: Open a new Problem Management Record with screen shots

[http://www.ibm.com/software/support/viewlet/probsub/ESR\\_Open\\_a\\_new\\_problem\\_report\\_viewlet.swf.html](http://www.ibm.com/software/support/viewlet/probsub/ESR_Open_a_new_problem_report_viewlet.swf.html)

ESR: Manage and search Problem Management Records with screen shots

[http://www.ibm.com/software/support/viewlet/probsub/ESR\\_Search\\_PMRs\\_Run\\_Reports\\_viewlet.swf.html](http://www.ibm.com/software/support/viewlet/probsub/ESR_Search_PMRs_Run_Reports_viewlet.swf.html)

## **Related Links**

IBM Rational Software Support

<http://www.ibm.com/software/rational/support/>

IBM Software Support Handbook Link

<http://techsupport.services.ibm.com/guides/handbook.html>

Before contacting IBM Support

<http://techsupport.services.ibm.com/guides/beforecontacting.html>

IBM Rational Software Support Contact Information:

<http://www.ibm.com/software/rational/support/contact.html>

## **ESR Contact Details**

Email [esrhelppdesk@us.ibm.com](mailto:esrhelppdesk@us.ibm.com)

Web form <https://www-111.ibm.com/software/servlet/CustAssist?topic=esr>

Phone <http://www.ibm.com/software/support/help-contactus.html>