

IBM Software Group

Electronic Service Request (ESR)

IBM's electronic problem submission tool

Spring 2006

Rational. software



 business on demand software

Overview

- **ESR Overview**
- **ESR Help**
- **Registration and access for Passport Advantage customers**
- **Caller Self-Nomination**
- **ESR's home page**
- **My Profile for Electronic Service Request**
- **Open a new problem report**
- **Search problem reports**
- **Search problem reports - Reporting**
- **Site technical contact administration**
- **ESR Enhancements – December 2005**



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 then work with the 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.
- 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.
- Attach files to your PMR.

IMPORTANT: The browsers listed below support ESR. In addition, JavaScript must be enabled in the browser and the browser must be set to accept cookies.

- Netscape 7 and above
- Mozilla 1.4 and above
- Internet Explorer 6 and above

Anyone using a lower level version of the browsers has limited functionality. If you are using an earlier or unknown browser/version, after you sign in, you will be taken to a previous version of ESR that will allow you to create and update PMRs, as well as run reports. Updating to a supported browser will allow you to use the latest version of ESR that has many new and enhanced features.



ESR Help

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

Access ESR's on line help 24 hours a day to learn more about ESR and to view the ESR Help Desk e-mail address and phone numbers. These pages can also be accessed from the ESR help link located from the left side of all of ESR's pages.

The screenshot shows the IBM Software support page for Electronic Service Request (ESR) help. The page has a navigation menu on the left with categories like Software, Trials and betas, Support, and Training and certification. The main content area is titled 'Software support' and 'Electronic Service Request (ESR) help'. It includes a breadcrumb trail 'Software > Support > Assistance >', a 'Sign in | Register' button, and a list of links: Overview, How to use ESR, FAQs, Glossary, and Contact us. Below this is a list of topics with expandable arrows, such as 'Accessing ESR', 'Managing My profile for ESR', and 'Opening a new problem report'. A section titled 'Accessing ESR' provides instructions for users, including requirements like having a valid software support contract and being registered with IBM. A right-hand sidebar contains sections for 'My support', 'Related information', 'ESR sign in', 'ESR Customer Service', 'Site tours', and 'Support feedback'. Four yellow callout bubbles are overlaid on the page: one pointing to the 'How to use ESR' link, one pointing to the 'ESR sign in' link, one pointing to the 'Accessing ESR' section, and one pointing to the 'Site tours' link.

Callout 1: Detailed instructions of how to use ESR's features

Callout 2: Log into ESR

Callout 3: Write or call the ESR Help Desk to receive assistance on using ESR

Callout 4: Visit our site tours to be taken through all of ESR's pages and be shown the functions of each

Callout 5: Select a topic to view the information



ESR Registration and Access for Passport Advantage

Before you can access ESR, you must:

1. Have a valid software support contract in place.
2. Have an IBM ID. If you already have one, proceed to the next step. Otherwise, register yourself using the IBM Common Registration Process to obtain your IBM ID. After registering with IBM, give this IBM ID to your PSTC or SSTC. Please use your e-mail address as your IBM ID.
3. The PSTC or SSTC must add you as an Authorized Caller/User in ESR under their contract number. When adding the Authorized Caller/User, only a valid IBM ID (which is to be obtained in Step two above) will be required.
4. After the PSTC or SSTC adds you as an Authorized Caller/User to ESR, you will receive a welcome letter that contains a URL to take you to ESR.
5. Select the URL in the ESR welcome e-mail you received notifying you that you are an Authorized Caller for ESR. If you have already authenticated, you will be taken directly into ESR. If you have not already authenticated, you will be directed to the login page where you will login in using your IBM ID and password.

After you have accessed ESR the first time using the URL in the ESR welcome e-mail, you can access ESR any time using the following steps:

- Go to the IBM Software Support Web site at <http://www.ibm.com/software/support>.
- Click the Submit/track problems tab.
- Click ESR.
- Enter your IBM ID and password; if you have already accessed a secure IBM Web site during your current browser session, you will be taken directly to the ESR home page without being prompted for your IBM ID and password



ESR Access for Passport Advantage

Once you have determined that you have a valid software support contract in place, are registered with IBM and listed as an Authorized Caller/User in ESR, select the URL in the ESR welcome e-mail you received notifying you that you are an Authorized Caller for ESR. If you have already authenticated, you will be taken directly into ESR. If you have not already authenticated, you will be directed to the login page where you will login in using your IBM ID and password.

After you have accessed ESR the first time using the URL in the ESR welcome e-mail, you can access ESR any time using the following steps:

- Go to the IBM Software Support Web site at <http://www.ibm.com/software/support>.
- Click the Submit/track problems tab.
- Click ESR.
- Enter your IBM ID and password; if you have already accessed a secure IBM Web site during your current browser session, you will be taken directly to the ESR home page without being prompted for your IBM ID and password.



Caller Self-Nomination

When you attempt to access ESR but are not entitled, you will be redirected to the “Caller self-nomination” page where you will be able to nominate yourself to be added as an Authorized Caller/User to a customer number. The PSTC is notified via e-mail and can choose to approve or deny the nomination. You will also be able to access this form if you are listed as an Authorized Caller/User on one customer number but want to be added to another. It is linked from the My Profile page. This allows you to be added to a customer number in a more timely manner.

Caller Self-Nomination

To nominate yourself for access to use ESR, please enter the IBM customer number and select the the country name for your support contract. You will be nominated for ESR access to all contracts that match the information provided. Before you can gain access to the support contracts, the Site Technical Contact (STC) for the contracts must approve your request.

If you wish, you may limit the nomination requests to contracts that have a certain company name or STC.

The fields indicated with an asterisk (*) are required to complete this transaction; other fields are optional. If you do not want to provide us with the required information, Please use the Back button on your browser, or close the window or browser session that is displaying this page, to return to the previous page.

* IBM customer number

* Select a country

Company name

STC's first name

STC's last name

STC's e-mail address

[View pending nominations](#)

The IBM customer number and country fields are required.

STC info is not required but helpful in finding the STC

View your pending nominations

ESR's home page – No draft or recent PMRs

After logging into ESR, you will be taken to ESR's Home page. This is what you will see if you do not have any draft or recently submitted PMRs. The left navigator is used throughout ESR and will enable you to move easily through the tool.

The screenshot shows the ESR home page interface. On the left is a vertical navigation menu with the following items: Software support, Electronic Service Request, Open a new problem report, Search problem report, Site technical contact administration, My profile for Electronic Service Request, and Related Links (Passport Advantage Online, ESR help). The main content area is titled "Electronic Service Request" and includes a greeting: "Hello, IBM Customer ('IBM Customer' will be your name)". Below the greeting are three main sections: 1. "Open a new problem report" with a blue circular icon containing a right-pointing arrow. 2. "Find any problem report" with a search bar. 3. "Search problem reports under your customer number" with a search bar and a "Go" button. Three yellow callout bubbles are present: one pointing to the "Open a new problem report" link, one pointing to the search bar under "Find any problem report", and one pointing to the search bar under "Search problem reports under your customer number".

Access ESR help and Passport Advantage Online

Open a new PMR

Search PMRs submitted thru ESR and by phone



ESR's home page – Draft and recent PMRs

Software support >

Electronic Service Request

Hello, ESR Customer

[Open a new problem report](#)

My unfinished report(s)

Short Description	Created	Expires
Draft PMR	Dec 1, 2004	Dec 6, 2004

Work with problem reports submitted online

My reports recently submitted online

Report #	Sev	Short Description	Last Updated	Submitted	Status
23305 514 000	4	Test only disregard	Oct 14, 2004	Exp 28, 2004	Closed
23292 514 000	4	ESR: test - disregard	Aug 22, 2004	Jul 31, 2004	Closed

[All problem reports submitted online](#)

Search problem reports submitted online

Enter Keywords

Find any problem report

Search by report number

Enter a report number

Search problem reports under a customer number

Enter Keywords

Select one of your customer numbers

Open a new PMR

View last 4 PMRs that were submitted thru ESR

Search PMRs submitted thru ESR. This search will return results quicker because it only searches on PMRs submitted thru ESR

View unfinished/draft PMRs that were submitted thru ESR.

The Short Description displays the text you entered into that field. If you did not enter anything, nothing will be displayed.

Search all PMRs submitted thru ESR and by phone by PMR number, keyword or customer number



My profile for Electronic Service Request

To update your name, telephone numbers, e-mail address, e-mail notification preferences, including the language you would like to receive ESR e-mails, select My profile for Electronic Service Request from the left side of any ESR page.

Software support > My profile for Electronic Service Request

The information on this page is optional and will be used only within the problem management system.

First name: ESR
 Last name: Customer
 Telephone: 111-111-1111
 Alternate telephone:
 Pager:
 Email: esrcustomer@ibm.com
 Alternate email:
 Time zone: Universal Time Coordinated (UTC)
 Language: English (United States)

Preferred contact method:

Contract essentials:
 000107907
 Passport Advantage Express
 Request additional contracts

Severity	Notify every update	Notify on closure
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Caller notification preferences:
 Notify on caller change:

Product - Component	Delete
Communications Server - WHIS Internet (Conu) 500 - Comm Server AIX 610	<input type="checkbox"/>

Submit ^ Back ^

Update first and last names, phone numbers, e-mail and preferred contact method

Select the language you want to receive ESR e-mails.
 Note: If you want to view ESR in one of the supported languages, you will need to change your browser settings.

Remove products and components from Primary list

Request to be added to additional contracts

Set Caller/User notification preferences

Press Submit to save your changes



Open a new problem report – select a product/component

After selecting “Open a new problem report” from the left side of any ESR page, you will be taken to page below. You need to select a product, a component then a contract, if applicable, prior to completing your problem report. This page shows what you will see if products and components have been saved to your primary list. If you have not saved at least one product and component, the drop down selection list will say “No products/components/contracts in my primary list”.

The screenshot shows the 'Open a new problem report' page. On the left is a navigation menu with items like 'Software support', 'Service', 'Problem', 'Problem reports', 'Site technical contact administration', 'My profile for Electronic Service Request', 'Related Links', 'Passport Advantage online', and 'ESR help'. The main content area is titled 'Open a new problem report' and includes a 'My primary product/component list' section with explanatory text. Below this are three dropdown menus: 'Select a product:' (set to 'Communications Server'), 'Select a component for that product:' (set to 'WHIS Internet (ConU) 500 - Comm Server AIX 610'), and 'Select a contract:' (set to 'Passport Advantage Express - Passport Advantage Express (7777777/000)'). A 'Go' button is next to the contract dropdown. There is also a 'Search my products' section with a 'Select a Contract (optional)' dropdown, an 'and/or' label, and an 'Enter Keywords' field with another 'Go' button. A 'Contract essentials' sidebar on the right lists '0000107907' and 'Passport Advantage Express'. Three yellow callouts provide additional context: one points to the primary list section, another to the dropdowns, and a third to the search fields.

Create your own primary list of products and components.

If there are no products, components or contracts ...

... you must search for the product you want to report on

View Contract Essentials:
 Contract number
 Title
 Description
 Customer number
 Country
 Primary Site Technical Contact

You can search for a product by a Contract, keywords or both.



Search problem reports

To view, update or run reports on PMRs, select Search problem reports from the left side of any ESR page.

Search PMRs submitted thru ESR

Search all ESR and phone PMRs by PMR number, keyword or customer number



Search problem reports - Reporting

After selecting search criteria from the Search problem reports main page, you are taken to the Search Results page where you can view or update a PMR, as well as run, print, customize and download reports for PMRs created thru ESR and by phone.

The screenshot shows the 'Search Results' page with several callouts:

- Refine search:** Points to the 'Filter list content' section.
- Show your reports submitted thru ESR:** Points to the 'Show all reports for a customer number' option.
- Show reports submitted thru the phone and ESR:** Points to the 'Show open and closed reports' option.
- Download report:** Points to the 'Printable report' link.
- Click on column headings to sort:** Points to the 'Submitted' column header in the table.
- 20 PMRs at a time, click "Next" to view more:** Points to the 'Next >' link above the table.

The 'Filter list content' section includes:

- Show my reports submitted online only
- Show all reports for a customer number (7777777 000)
- Show open and closed reports
- Show open reports only
- Show closed reports only

The table below shows the search results:

Report #	Sev	Submitted ↑	Short Description	Status
23351 514 000	4	Nov 26, 2004		Closed
23350 514 000	3	Nov 25, 2004		Open
23349 514 000	4	Nov 22, 2004	Test Only	Closed
23348 514 000	4	Nov 22, 2004		Open
23346 514 000	1	Nov 19, 2004	Garman test, please	Closed
23347 514 000	4	Nov 19, 2004	Another Japanese Test	Closed
23345 514 000	4	Nov 19, 2004	Japanese Test, Please	Closed



Search problem reports - Reporting

Customize reports by selecting **Customize list further**. View or update a PMR by selecting the PMR number.

ESR - Customize problem list

Use the dropdown menus to assign information items to columns and to add or remove columns

Columns	Information items	Sort on
1	Problem number	Date submitted
2	Severity	
3	Date submitted	<input type="radio"/> Values increase
4	Short description	<input checked="" type="radio"/> Values decrease
5	Status	
6	Contact name	
7	Customer number	
8	Date modified	

Update list Cancel

Terms of use Privacy Close [X]

Search Results

Software support > Search Results

Filter list content

Show my reports submitted online only Show open and closed reports

Show all reports for a customer number

7777777 000

Enter more keywords to refine your search

Customize list further

Start a new search Spreadsheet-friendly format Printable report

To sort by an attribute, click on its column header. Click again to reverse the sort order.

1 - 20 of 59 reports [Next >](#)

Report #	Sev	Submitted ↑	Short Description	Status
23351 5:14 000	4	Nov 26, 2004		Closed
23350 5:14 000	3	Nov 25, 2004		Open
23349 5:14 000	4	Nov 22, 2004	Test On y	Closed
23348 5:14 000	4	Nov 22, 2004		Open
23346 5:14 000	4	Nov 19, 2004	German test, please	Closed
23347 5:14 000	4	Nov 19, 2004	Another Japanese Tes	Closed
23345 5:14 000	4	Nov 19, 2004	Japanese Test, Pleas	Closed

Customize report including number of columns and attributes of columns

To view or update a PMR's Severity or comments, select the PMR.



Site technical contact administration

To add or manage Authorized Callers/Users, the Primary Site Technical Contact (PSTC) or Secondary Site Technical Contact (SSTC) is to select Site technical contact administration from the left side of any ESR page. This link will not be visible if you are not a PSTC or SSTC. The PSTC or SSTC will first be required to enter a contract number before being shown the Authorized Caller's/Users list for their contract.



The link will not be visible if you are not a PSTC or SSTC.



To view, add or edit Authorized Callers/Users, select a Contract then press **Display caller list**.

View contract essentials



Site technical contact administration

After selecting a contract and pressing **Display caller list**, the PSTC or SSTC is taken to the following page where they can see their role, view Authorized Callers/Users by their last name, view a different contract's Authorized Caller/User list, and view contract essentials.

The screenshot shows the 'Site technical contact administration' page. On the left is a navigation menu with items like 'Software support', 'Electronic Service Request', and 'Site technical contact administration'. The main content area includes a 'Hello, ESR Customer' greeting, a 'Select a contract' dropdown menu currently showing 'Passport Advantage Express - Passport Advantage Express', and a 'Display caller list' button. Below this, it states 'Contract title Passport Advantage Express' and 'You are a **Secondary STC** on this contract.' There are links for 'Add new caller' and 'Manage Nominations'. A note explains that a new caller's IBM registration ID is needed and provides a URL. A 'Filter caller list alphabetically' section shows a list of letters 'A B C D E G H J K L M N O P R S T V Y'. Below this is a table with columns for Name, Type, Status, and Details. One entry is visible: 'v3 Test' (Authorized Caller, Active) with a 'View' link. At the bottom, there are 'Submit' and 'Back to top' buttons, and a legend for status terms: Active, Inactive, and Terminated.

Callouts:

- Top Left:** The link will not be visible if you are not a PSTC or SSTC.
- Bottom Left:** Your role
- Bottom Left:** A-Z navigation by last name
- Top Right:** To view a different contract's Authorized Caller/User list, select the contract and then **Display caller list**.
- Bottom Right:** View Contract Essentials: Contract number, Title, Description, Customer number, Country, Primary Site Technical Contact



Site technical contact administration

From this same page, the PSTC or SSTC can add a new Caller/User, update an existing Caller's/User's type and status, and view the Caller's/User's name, phone and e-mail.

The screenshot shows the 'Site technical contact administration' page. The page title is 'Site technical contact administration' and it includes a greeting 'Hello, ESR Customer'. A 'Select a contract' dropdown menu is set to 'Passport Advantage Express - Passport Advantage Express'. A 'Display caller list' button is visible. Below this, the contract title 'Passport Advantage Express' is shown, and the user is identified as a 'Secondary STC'. There are links for 'Add new caller' and 'Manage Nominations'. A note explains that an IBM ID is required for adding new callers. A 'Filter caller list alphabetically' section allows filtering by the first letter of the last name. A table lists callers with columns for Name, Type, Status, and Details. The first entry is 'Test' with Type 'Authorized Caller' and Status 'Active'. A 'View' link is next to it. At the bottom, there are 'Submit' and 'Back to top' buttons, and a legend for status definitions: Active (able to submit), Inactive (cannot submit but can be reactivated), and Terminated (removed from database).

The user's IBM ID is required to add new Callers/Users.

The Manage nominations link will be displayed if you are a PSTC and there is at least one nomination to accept or deny.

PSTCs can update Caller/User Type (Authorized Caller/User or Secondary STC).

View Caller's/User's name, phone number, e-mail

PSTCs and SSTCs can update Caller/User Status.

Definitions of Status.



ESR Enhancements – December 2005

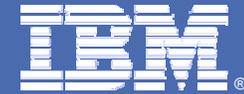
On December 10, 2005, ESR was enhanced to streamline the Site Technical Contact's (STC) administration of IBM Business Partners (BPs). This makes it easier for STCs to authorize BPs to manage PMRs in ESR, and assist them in resolving their software issue. In addition, a new user type has been added.

▪ **Details:**

- ▶ **Business Partner Integration** - The new, streamlined STC administration functionality allows the STCs to:
 - Easily manage BP access to specified contract(s) by using ESR's new BP Administration functionality.
 - Grant a BP access, by location, to create one or unlimited PMRs for specified contract(s).
- ▶ **Look and feel updates** - The ESR web pages have been updated to be consistent with the ibm.com site. The existing features function the same as they did prior to this release.
- ▶ **Authorized Reader** - This new user type allows read-only permission to all PMRs for specified contract(s).

For the complete details, please visit <http://ibm.com/software/support/whatsnew.html>





IBM Software Group

Do you have Questions regarding ESR?

Please visit the ESR Help page:

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

Rational. software



 business on demand software