

# Business Partner Process for the IBM HW Support Extension Offering (Replacing End of Service for BP Offering)

Effective 8/23/2018 the new IBM HW Support Extension offering should be utilized to quote HW maintenance support extensions after a machine type/model has been withdrawn from service

## Notes regarding the IBM HW Support Extension:

- This offering should be used for all machines withdrawn from service unless they are being added to an existing contract that already has End of Service BP offering on it and if the client already has a signed SOW for the End of Service BP offering. Note this new offering may be used even if the end user has the old offering contracted, but will still require the client to sign the **new** SOW. If using the old End of Service BP offering skip down to that section found on page 5 of this document.
- This offering cannot be renewed via the Existing Discount Renewal (EDR) process.
- Offering may be contracted via a standalone proposal, combined with other ISAT offering(s) or as an add to an existing contract, however, it is suggested that it be added to the same contract where the machine is last on HW maintenance so that any special bid discounts may carry over to the support extension.
- Machines that are on IBM maintenance (regular MA or EOS MA) at the time of EOS withdrawal will be eligible to receive any special bid discounting approved for the regular maintenance if the IBM HW Support Extension is added to the contract it resided on for regular HWMA.
- If the machine was previously supported by the End of Service for BP offering the BP must provide expiring contract number in the COL record in order to verify prior pricing. If this is not provided for machines that were on EOS MA prior reference price may be used.
- End of Service support requests can only be approved for a maximum of up to one (1) year, however, may be approved for a lesser period due to parts or labor constraints. Please do not request coverage greater than one (1) year.
- The new offering “**IBM HW Support Extension**” applies the current reference price from ISAT plus any entitled term, prepay, and price protection as applicable. This is NOT a plug a price offering. This offering when added to an existing contract will also inherit any special bid discounts that were approved and applied to the contract at the category, machine type or machine type/model level provided the **IBM HW Support Extension** is being quoted as a merge to the same contract the HW Maintenance resides upon with said previously approved discounts. It is the BP team's responsibility to check that pricing is what is desired, and if not, or there is question regarding pricing, an End of Service Extension request need be submitted BAU.

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- Although, ISAT will provide a price when adding the IBM HW Support Extension offering to a proposal, an approval from IBM Service Planning **IS REQUIRED** before providing pricing to a customer and in some cases to enable speed to market a 'pre-approval' has been provided for select machines.
- A color-coded spreadsheet or the '**BP HW Support Extension Pre-approval File**' will be provided to Distributors and T1 Business Partners containing a serialized list of machines that have been reviewed by IBM Service Planning and will notate whether a machine has been pre-approved to quote, if it cannot be quoted and extension not available, or if additional Service Planning review and approval is required so a machine can be quoted under the IBM HW Support Extension offering.

## How the BP HW Support Extension Pre-Approval File Works:

- If the machine serial has been pre-approved to quote (not requiring a EOS support extension request submission) it will be in a green status as listed in the **BP HW Support Extension Pre-Approval File**. It is required that the ISAT user **not exceed** the date listed in the "Approved HW Support Extension Stop Date" column of the file as the services end date on the ISAT proposal. Business Partner are enabled to quote a machine that is '**green**' outside of 90 days to end of service date.
- If the machine serial has not been approved to be quoted for an IBM HW Support Extension, it will be in a red status, is not qualified for an EOS extension, and must **NOT** be quoted.
- Machines listed in the yellow category (or machines not listed in the **BP HW Support Extension Pre-Approval File**) require submission of an End of Service Request BAU through Contracts OnLine. Requests for extensions for 'yellow' category machines and/or machines not on the listing should be submitted inside 90 days to end of service date only.
  - § Distributors and T1 Business Partners must submit a completed copy of the current End of Service template (located on PartnerWorld) with all required information, and documentation provided.
  - § If there is question regarding if a machine is presently on an active EOS extension contract, contact your IBM TSS Channel Representative or Guy von der Esch who can cross validate if the machine is presently on contract or not.
- This new offering requires a service start and service stop date be entered and **must** not be left with system defaulted stop dates.

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- IBM is not liable for quotations, omissions, proposals provided, contracts registered that exceed the Approved HW Support Extension Stop Date and/or business partner generated pricing.

## Process Steps

**Step 1.** Determine the approval status of the machine type/serial number

Review the current version of the **BP HW Support Extension Pre-Approval File** provided to your firm by your IBM Business Partner Channel Representative. The date of the current version will be posted on PartnerWorld in the Document Library section where these instructions are housed.

**Step 2.** Quote as appropriate based upon the support option listed for the machine type/model.

- **GREEN:** This machine/serial may be quoted using the IBM HW Support Extension offering through the date listed in the “Approved HW Support Extension Stop Date” column on the **BP HW Support Extension Pre-Approval File**. ISAT user must enter this date in the “Services Effective To” field in ISAT. \*Note\* IBM is not liable for quotations, omissions, proposals provided, contracts registered that exceed the Approved HW Support Extension Stop Date and/or business partner generated pricing.
  - a) ISAT user creates an add to contract from the parent contract where the HW maintenance for the machine is expiring.
  - b) ISAT user adds the IBM HW Support Extension offering, then adds the pre-approved **GREEN** machines by serial number to the offering.
  - c) ISAT user must enter a start and stop date for each serial number. A stop date must be entered in the “Services Effective To” field in ISAT consistent with the date found in the listed in the “Approved HW Support Extension Stop Date” column on the **BP HW Support Extension Pre-Approval File**.
  - d) ISAT user may verify if discounts have carried over from previously approved discounts applied to the contract by comparing price produced to a standalone quote or to previously billed HW maintenance.
  - e) ISAT user prepares documents for release to the end user client including the Statement of Work.
- **RED:** Machine type/serial numbers listed red cannot be supported beyond the withdrawn from service date.
  - a) It may be submitted for vendor pricing consideration, check the IBM End of Service Lifecycle tool to verify.

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IBM End of Service (EOS) Lifecycle Support Tool located on the PartnerWorld Document Library (which can be reached via the “BP Special Bid forms and process documents” link in COL under the “Related Links” section) page to determine the products maintenance withdrawal date and EOS support status:

## **New!** IBM End of Service (EOS) Lifecycle Support Tool



Business Partners should use the IBM EOS Lifecycle Support Tool to view the current EOS lifecycle status of a machine type/model and to identify the IBM EOS maintenance extensions available to end-users. The EOS Lifecycle Support Tool will be updated periodically so it is advised to utilize the most recent version of the tool for questions regarding EOS support options.

### Instructions for Use:

1. Determine the IBM EOS Lifecycle Support Solution for each EOS machine by using the “Find” function on the “IBM Lifecycle Tool” tab.
  2. Follow process steps below based upon the corresponding WHITE, RED, YELLOW, GREEN, BLUE color code from the IBM Lifecycle Tool tab.
  3. It is suggested the Business Partner does not submit EOS extension request until 90 days prior to EOS date.
- b) If the status is also red on the IBM End of Service Lifecycle tool the user may complete a MASVEND form and include all features (billable and non-billable) and submit the request via the MVS Express transaction type in COL.
- c) Submission will follow the documented MVS process found on PartnerWorld and approval will be returned via that process if approved by a vendor.
- **YELLOW:** This machine type/serial number requires additional review by IBM Service Planning to determine if it can be supported. The following steps should also be taken if the machine type/serial number is not listed on the **BP HW Support Extension Pre-Approval File**.
    - a) Submitter to complete the EOS template spreadsheet located on the PartnerWorld Document Library page. The appropriate page may be reached via COL by clicking on “Rel links” to the top of the screen. A new window will open with links, click the “BP Special Bid forms and process documents” link which takes you to the PW “Channel Support, Business Operations and other materials” page. Find the End of Service topic:

## **New!** Required for End of Service (EOS) IBM Machines



This form must be completed and submitted in the COL request for machines in which you require a hardware maintenance EOS quote.

The template has an example tab that shows and explains all the data that is required and how to complete the form. Do not enter data on that tab, use only the “Input Data” tab for data entry. Please paste only by using “Match destination format or “Paste Special” so as not to change formats in the sheet.

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**\*Note\*** as of May 2018 feature codes are no longer required on EOS submissions.

- b) ISAT user creates an add to contract from the parent contract where the HW maintenance for the machine is expiring.
  - c) ISAT user adds the IBM HW Support Extension offering, then adds machines by serial number to the offering.
  - d) Distributor/SP1 submits request via COL using the End of Service Request transaction type and attaches the EOS template and ISAT proposal.
    - i. Select Special Bid Quote and Waiver Requests supplier organization.
    - ii. Select the End of Service transaction type.
    - iii. Complete all COL template fields including the last contract # the machine(s) were on for regular or EOS maintenance.
    - iv. Ensure you have the EOS with MVS path document flow selected or SP EOS with MVS path, if appropriate.
    - v. Attach the fully completed EOS Template and ISAT proposal.
    - vi. Submit the transaction.
  - e) BPSOS team will send to IBM Service Planning for review and enter approved stop date in the “Services Effective To” field in ISAT consistent with the date provided by Service Planning, if approved. If denied, BPSOS will advise Distributor/SP1 of decision and whether Service Planning has okayed submission via MVS.
- **MACHINE/SERIAL NOT FOUND** on the **BP HW Support Extension Pre-Approval File**:
    - a) Follow instructions found above for **YELLOW** machine type/serial numbers.

## **Notes regarding the OLD End of Service for BP Offering:**

- This offering should not be contracted unless it is being added to an existing contract that already has the offering on it and if the client already has a signed SOW for the End of Service BP offering.
- This offering is a Special Bid Plug-a-Price offering and cannot be renewed via the Existing Discount Renewal (EDR) process.
- Offering may be contracted via a standalone proposal, combined with other ISAT offering(s) or as an add to an existing contract.
- Machines that have been off IBM maintenance for 90 days or longer at the time EOS withdrawal will be priced at reference.
- Machines that are on IBM maintenance (regular MA or EOS MA) at the time of EOS withdrawal will be priced with the same average monthly charges as the expiring/prior contract. BP must provide expiring contract number in the COL record in order to verify prior pricing. If this is not

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provided for machines that were on EOS MA prior reference price may be used.

- End of Service support requests can only be approved for a maximum of up to one (1) year, however, may be approved for a lesser period due to parts or labor constraints. Please do not request coverage greater than one (1) year.

**Step 1.** Review the current version of the IBM End of Service (EOS) Lifecycle Support Tool located on the PartnerWorld Document Library (which can be reached via the “BP Special Bid forms and process documents” link in COL under the “Related Links” section) page to determine the products maintenance withdrawal date and EOS support status:

## New! IBM End of Service (EOS) Lifecycle Support Tool



Business Partners should use the IBM EOS Lifecycle Support Tool to view the current EOS lifecycle status of a machine type/model and to identify the IBM EOS maintenance extensions available to end-users. The EOS Lifecycle Support Tool will be updated periodically so it is advised to utilize the most recent version of the tool for questions regarding EOS support options.

**Step 2.** Follow the tool’s instructions based upon the support option listed for the machine type/model.

### Instructions for Use:

1. Determine the IBM EOS Lifecycle Support Solution for each EOS machine by using the “Find” function on the “IBM Lifecycle Tool” tab.
2. Follow process steps below based upon the corresponding WHITE, RED, YELLOW, GREEN, BLUE color code from the IBM Lifecycle Tool tab.
3. It is suggested the Business Partner does not submit EOS extension request until 90 days prior to EOS date.

If machine type/model is in the “Red” category stop and submit a Multiple Vendor Services (MVS) request via that documented process.

If the machine type/model is the “White” category the product cannot be supported by IBM and is considered to be “No Bid”.

If the machine type/model is in the “Blue” category it may be too soon for IBM Service Delivery Planning to make a determination as to IBM’s ability to provide EOS support at the time of withdrawal. Submit the request once the EOS date is within 90 days, following the steps below to submit an End of Service support request.

If the machine type/model is in the “Yellow or Green” “Blue” category continue with steps below to submit an End of Service support request.

**Step 3.** Complete the EOS template spreadsheet located on the PartnerWorld Document Library page. The appropriate page may be reached via COL by clicking on “Rel links” to the top of the screen. A new window will open with links,

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click the “BP Special Bid forms and process documents” link which takes you to the PW “Channel Support, Business Operations and other materials” page. Find the End of Service topic:

## **New!** Required for End of Service (EOS) IBM Machines



This form must be completed and submitted in the COL request for machines in which you require a hardware maintenance EOS quote.

The template has an example tab that shows and explains all the data that is required and how to complete the form. Do not enter data on that tab, use only the “Input Data” tab for data entry. Please paste only by using “Match destination format or “Paste Special” so as not to change formats in the sheet.

**\*Note\*** as of May 2018 feature codes are no longer required on EOS submissions.

**Step 4.** Create an ISAT Proposal with the end user client’s information (CN, etc) and include the “END OF SERVICE FOR BP” offering aligned with the coverage dates being requested. This proposal may be a new standalone proposal or an add to an existing contract. BPSOS will add the EOS pricing to the offering, if approved.

**Step 5.** Submit the request via Contracts Online.

- a) Select Special Bid Quote and Waiver Requests supplier organization.
- b) Select the End of Service transaction type.
- c) Complete all COL template fields including the last contract # the machine(s) were on for regular or EOS maintenance.
- d) Ensure you have the EOS with MVS path document flow selected or SP EOS with MVS path, if appropriate.
- e) Attach the fully completed EOS Template and ISAT proposal.
- f) Submit the transaction.

**Step 6.** The BPSOS team will review the request and if it is complete, send to IBM Service Planning for review and approval, if required.

**Step 7a.** If the machine is pre-approved by Service Planning pricing will be applied and the approval documents will be returned to the submitter via Contracts OnLine.

**Step 7b.** If machine(s) are not on the pre-approved list, BPSOS sends to Service Planning. If approved by Service Planning the BPSOS focal will apply pricing and provide the ISAT proposal and other deliverable documents to the submitter via Contracts OnLine.

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**Step 7c.** If the request is not approved by Service Planning for direct coverage, yet is approved to vend, the BPSOS focal return the COL record to the submitter with comments and the record will be put into “EOS REJECTED, REQUEST MVS?” status. The submitter has the ability to now request Multiple Vendor Support (MVS) approval. Submitter must complete a MASVEND form and submit using this EOS record by selecting “Request MVS Quote” action. The COL request will now follow the usual MVS process.

**Step 7d.** If the request is not approved by Service Planning for direct coverage and it is not recommended to request vendor pricing the request will be returned as rejected – NO BID.

**Step 8.** If the client accepts pricing, BP submits signed contract to COL through the usual Special Bid registration process.