

Workflow Connect

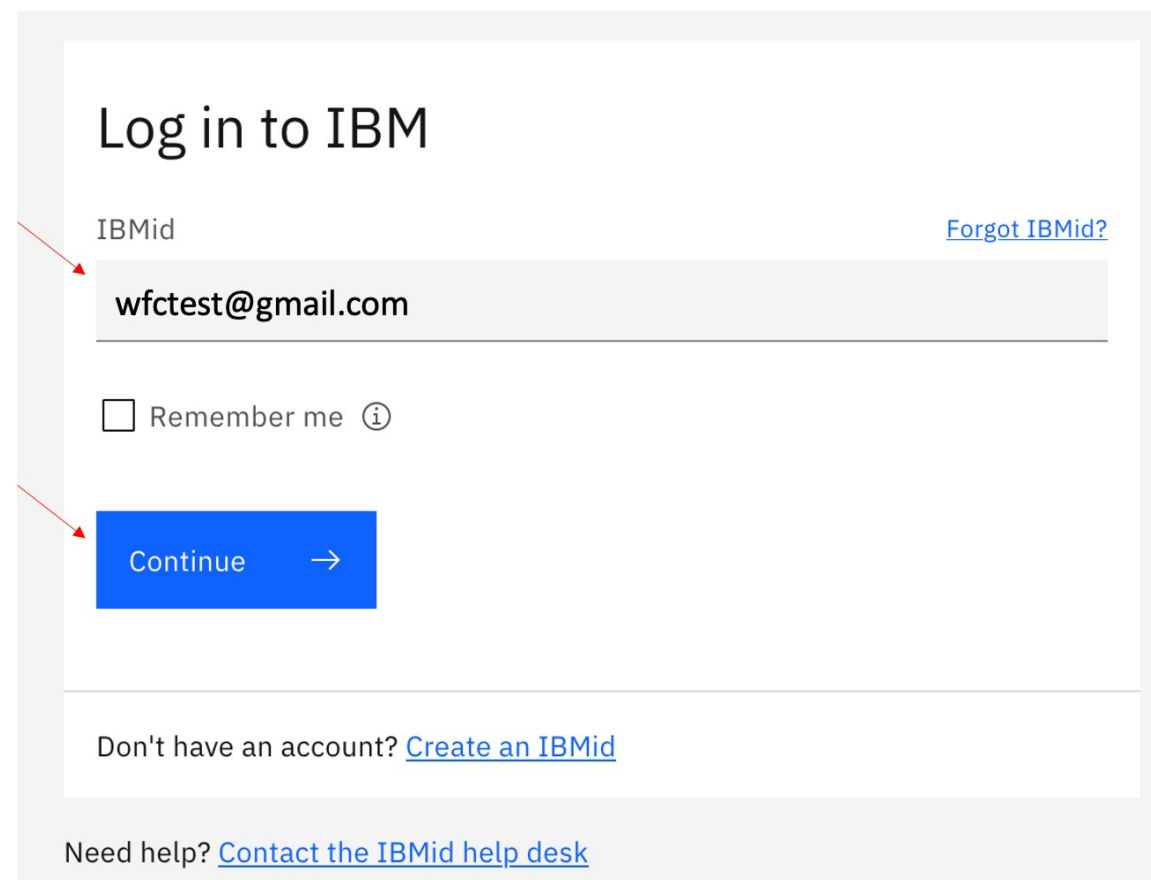
Maintenance and Annuity Services

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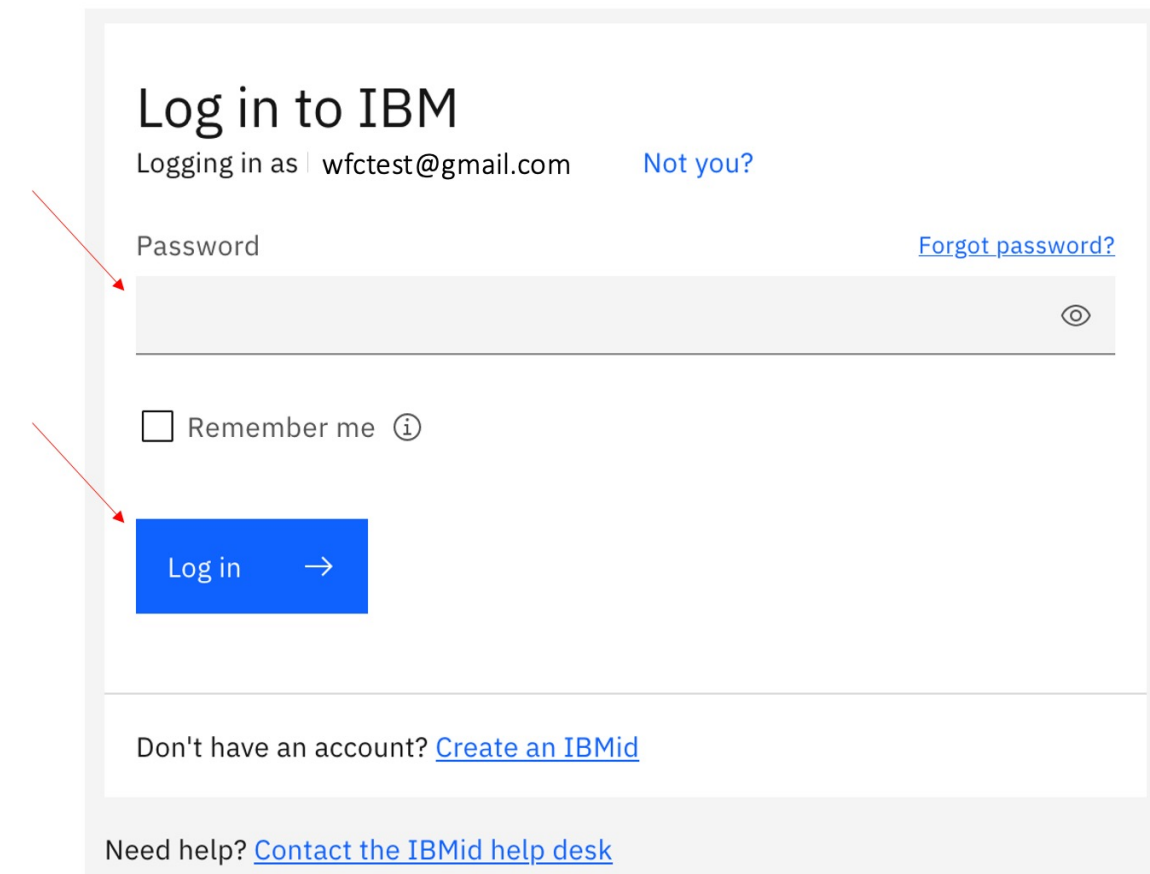
How to request access

1. Please access URL:
<https://www.ibm.com/support/operations/contracts/workflowconnect/login/customer>, you will be directed to IBM login page.
2. Fill out IBMid field with your IBMid and click on *Continue* button.



The screenshot shows the 'Log in to IBM' page. The 'IBMid' field is highlighted with a red arrow and contains the text 'wfctest@gmail.com'. Below it is a 'Remember me' checkbox. A blue 'Continue' button with a right arrow is also highlighted with a red arrow. At the bottom, there are links for 'Create an IBMid' and 'Contact the IBMid help desk'.

3. Insert your password and click on *Log in* button



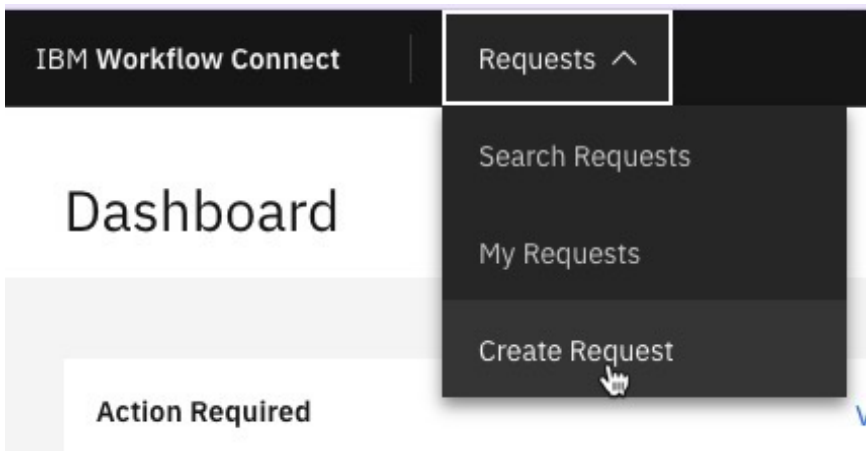
The screenshot shows the 'Log in to IBM' page. The 'Password' field is highlighted with a red arrow. Below it is a 'Remember me' checkbox. A blue 'Log in' button with a right arrow is also highlighted with a red arrow. At the bottom, there are links for 'Create an IBMid' and 'Contact the IBMid help desk'.

You will be automatically registered in Workflow Connect and re-directed to the **Dashboard** to start using the tool.

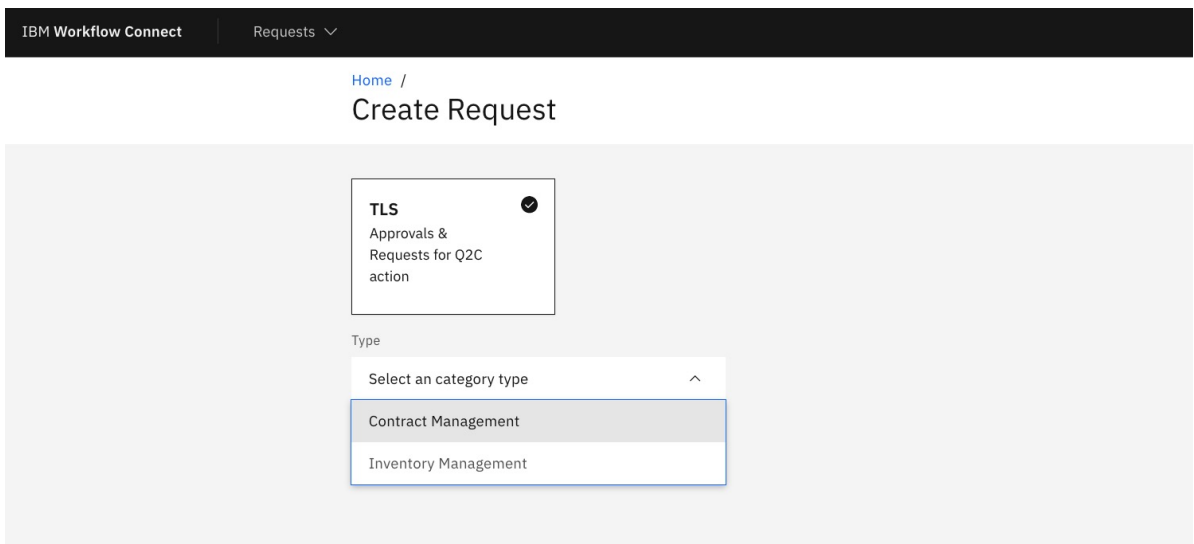
How to create a request (1/3)

On the Dashboard you will find your submitted requests

- 1. Click on ‘Requests’, ‘Create Request’ to raise a new request.

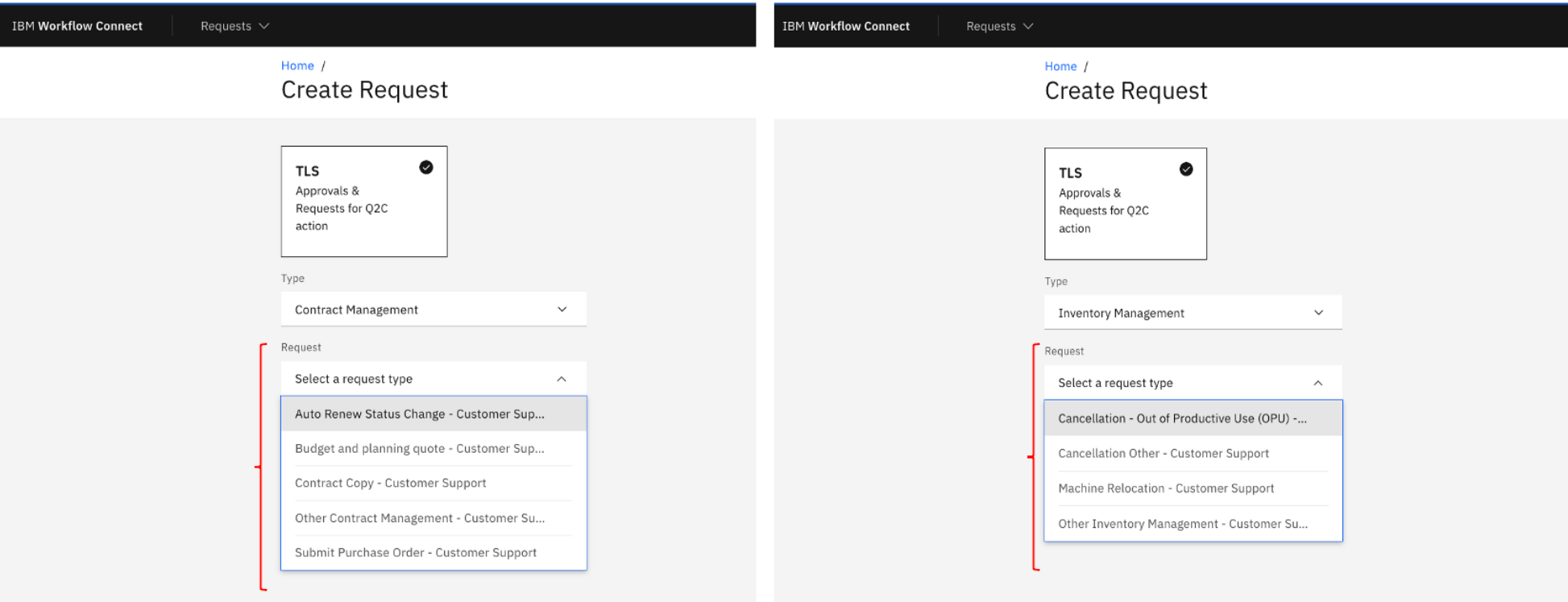


- 2. On Create Request page, click on the ‘Type’ dropdown.



Available categories: Inventory Management and Contract Management

- 3. After selecting either **Contract Management** or **Inventory Management** – you will find different request types to choose:



- 4. Select the corresponding request type and click on *Next*

Overview of request types:

Category Type	Request Type	Request Type Description
Inventory Management	Cancellation Out of Productive use (OPU) - Customer Support	Request discontinuance from a hardware maintenance contract, software services contract or both
Inventory Management	Cancellation Other - Customer Support	Request discontinuance from a hardware maintenance contract, software services contract or both where inventory is not taken out of productive use
Inventory Management	Machine Relocation - Customer Support	Moves machines from one customer location to another
Inventory Management	Other Inventory Management - Customer Support	Any other type of inventory change request
Contract Management	Auto Renew Status Change - Customer Support	Change contract auto-renew status and attach a purchase order (PO) if applicable
Contract Management	Budget and planning quote - Customer Support	Request a budget & planning (B&P) quote for an existing contract
Contract Management	Contract Copy - Customer Support	Request a copy of an IBM Customer Agreement (ICA), Client relationship agreement (CRA), Maintenance Services Agreement (MSA), bor a Statement of Work (SOW) for a specific offering
Contract Management	Submit PO - Customer Support	Submit a new purchase order, a replacement purchase order, or amend an existing purchase order
Contract Management	Other Contract Management - Customer Support	Contract request not covered by the previous contract options

How to create a request (2/3)

IBM Workflow Connect

Requests

[Home](#) / Create Request

TLS

Approvals & Requests for Q2C action

Type

Inventory Management

Request

Cancellation - Out of Productive Use (OPU)...

Next

5. Fill out the required information.
- Note: all fields are required, if not stated otherwise

IBM Workflow Connect

Requests

Request Number

Search requests...

[Home](#) / Cancellation - Out of Productive Use (OPU) - Customer Support (Inventory Management)

General Section

Description

My awesome request

Valid Through Date

05/27/2023

How the request will be called

Client Company Name

Customer Number

Country

Please select an option

Federal

Yes

No

Customer Support

Yes

Channel

Direct

6. Each template has different data fields.

For **Inventory Management** requests, on *Machine list input method* section, choose one of the two available options:

- Manual Input** if it is only a single machine, please provide the information requested in each field.
Note: all fields are required
- Import file**, you can either use the template or use any other file you have. If you use the *Inventory template*, download and open it, ensure you choose the corresponding tab, fill out and upload by clicking on *Add File* button and then *Upload file*.

Machine List Input Method

Input Method

Import File

Manual Input

Import File

Maintenance Contract Number

Inventory detail template

Machine List (Accepted file formats: xls, xlsx, xlsxm)

Add file

Click on the hyperlink to download the file.

How to create a request (3/3)

Machine List Input Method

Input Method

☐ Import File ☒ Manual Input

Manual Input

Reason for Cancellation

Please select an option

Type

Model

Serial

Type of Service

Please select an option

Maintenance Contract Number

Effective Date

mm/dd/yyyy

Note: Only one request type can be selected and submitted at a time.

7. Comments and additional files can be added on the *Additional Information* section.

To initiate a new request, follow all the previous steps.

Additional Information

Additional Comments (optional)

Please indicate business reason or additional comments

Additional Files (optional)

Add file

Cancel

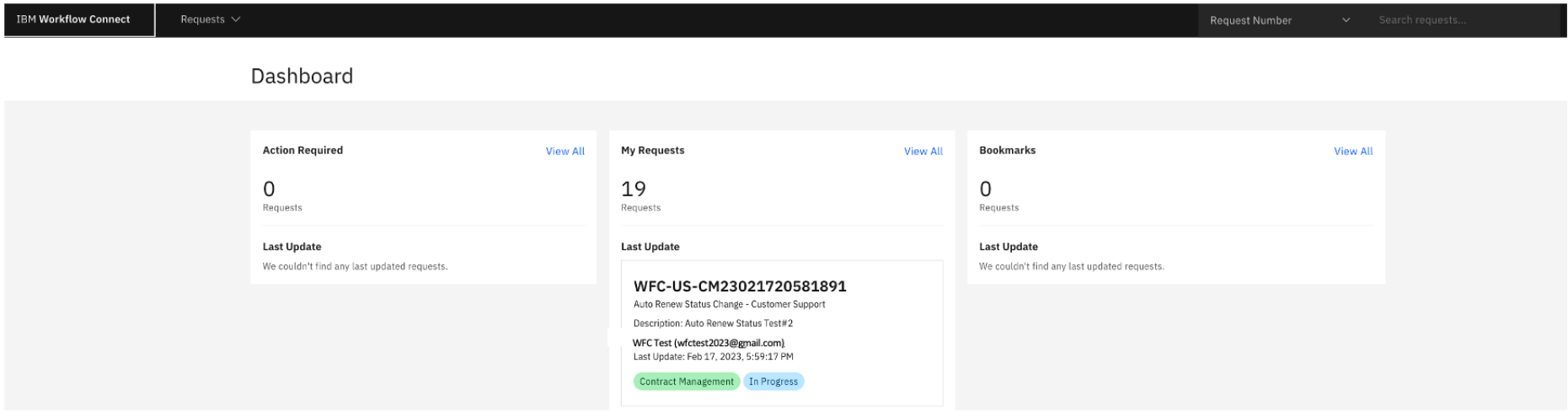
Submit

8. Click on *Submit* to send the request.

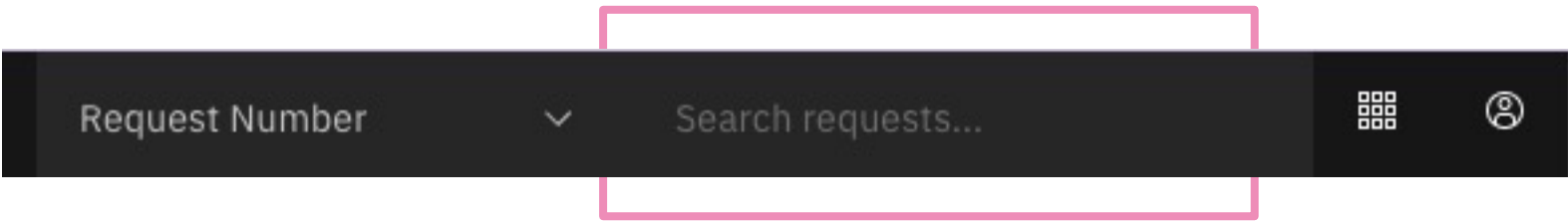
How to search a request

There are the following options:

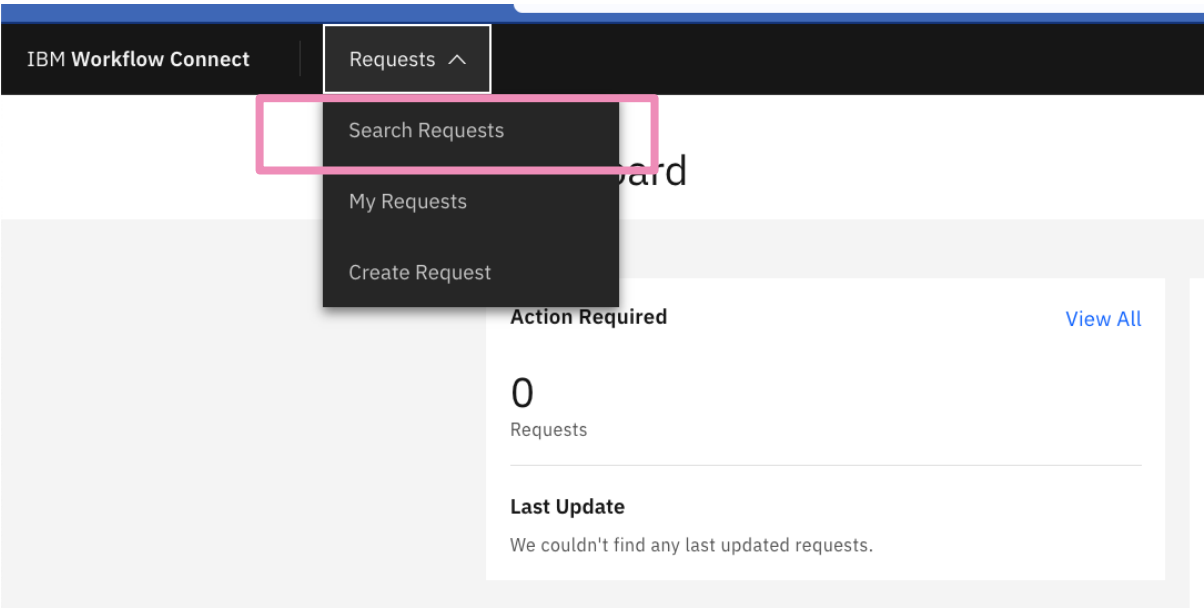
1. Dashboard is showing the last 3 updated requests. Click on the *card* to open.



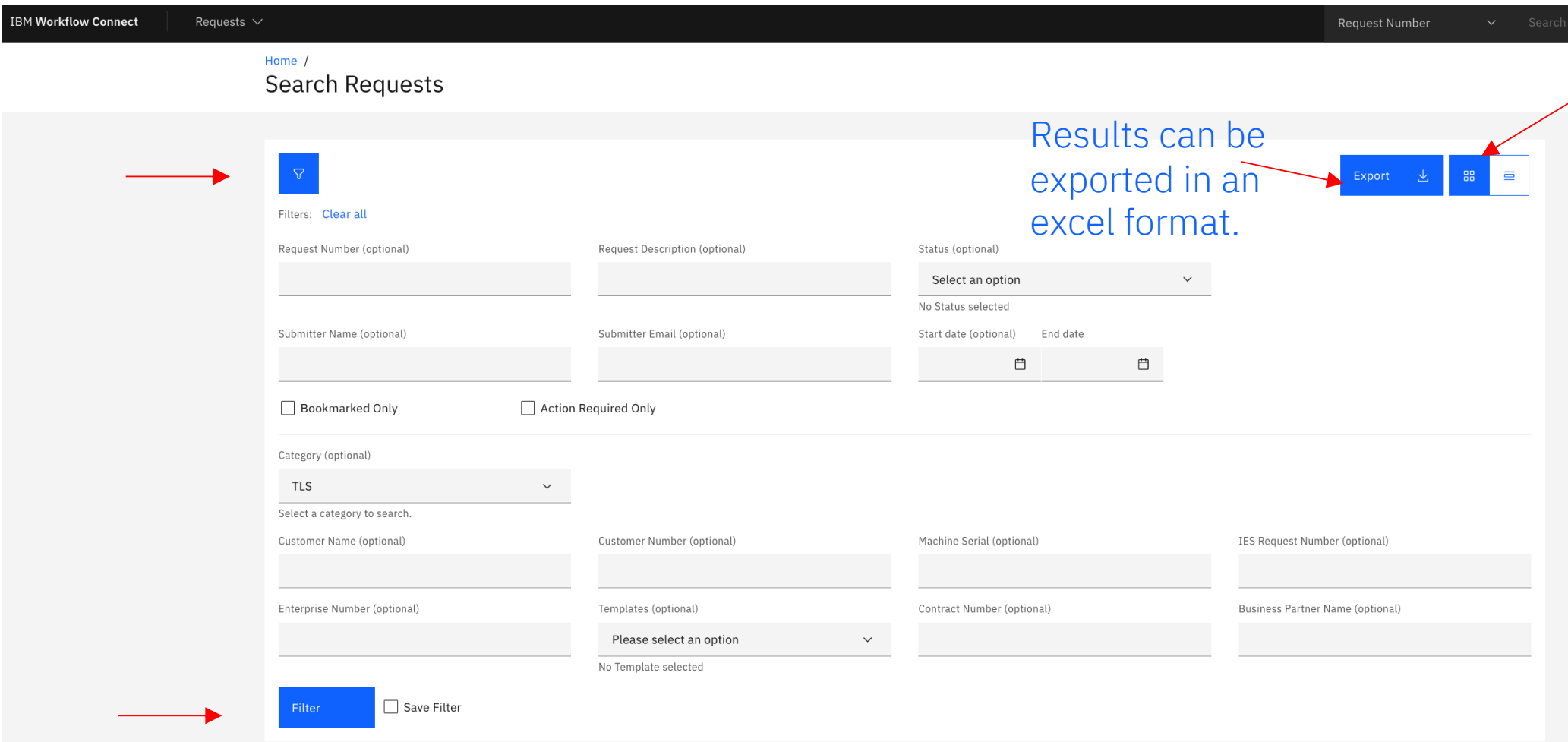
2. Searching by request number on the Request Number search on the top menu and clicking Enter.



3. Under 'Requests' choose Search Requests, which will show all requests.



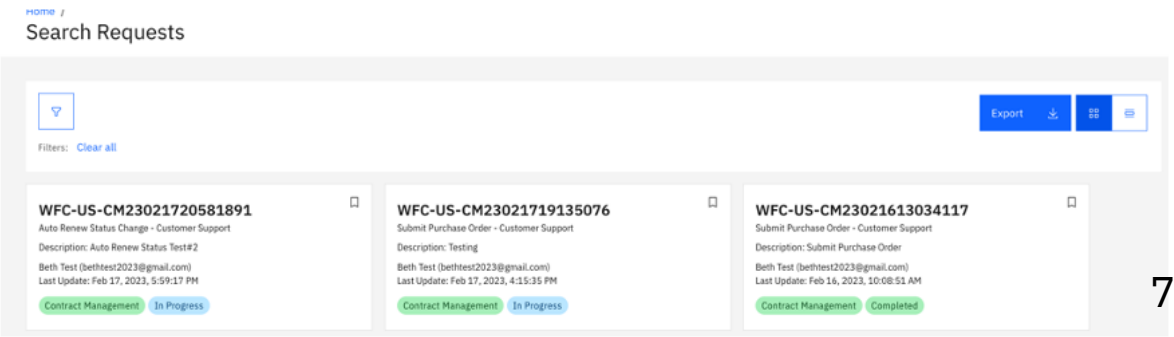
Click on the *Filter* icon to find other search options.



Results can be visualized in grid or list format.

Click on *Filter* to start the search

Status	Event	Type	Number	IES Request Number	Template	Description
In Progress	Assigned	Contract Management	WFC-US-CM23021720581891	GTUS2302172313145-1	Auto Renew Status Change - Customer Support	Auto Renew Status Test#2
In Progress	Assigned	Contract Management	WFC-US-CM23021719135076	GTUS2302172313124-1	Submit Purchase Order - Customer Support	Testing
Completed	Complete	Contract Management	WFC-US-CM23021613034117	GTUS2302162312909-1	Submit Purchase Order - Customer Support	Submit Purchase Order



How to check the progress of a request

Statuses are:

- **In Progress:** request has been submitted for IBM representative to manage it.
- **Completed:** request has been completed and closed by IBM.
- **Cancelled:** request has been cancelled by IBM.

An email notification will be sent once your request has been completed or cancelled, with a link to the transaction.

To check the details of the progress of your request, please click the *Transactional Steps* tab of the request.

[Home](#) / WFC-US-CM23021720581891

In Progress

Creation Date:
Feb 17, 2023, 5:58:17 PM

Template:
Auto Renew Status Change - Customer Support

Submitter:
wfctest@gmail.com

Last Event:
Assigned

Request

Comments 0

Transactional Steps

Transactional Steps

All time history about the transaction

Date	User	Description	Details	Comments
Feb 17, 2023, 5:59:33 PM	engage_support_api	Request Assignee		wfc@ibm.com
Feb 17, 2023, 5:59:21 PM	engage_support_api	Request Assigned in Engage Support	CSR Assigned	
Feb 17, 2023, 5:58:31 PM	wfc_automation	Request Accepted		
Feb 17, 2023, 5:58:30 PM	wfctest@gmail.com	Request Submitted		
Feb 17, 2023, 5:58:29 PM	wfctest@gmail.com	Request initiated in Engage Support	ES Request ID: GTSUS2302172313145-1	
Feb 17, 2023, 5:58:22 PM	wfctest@gmail.com	Request Created		Testing

