How To Open Case

Opening a Case

Instructional Video How to Open Case

Follow these steps to open an IBM Support case. Before you begin, you have your system's serial number and its associated account number. Depending on your product, a serial number may or may not be required.

Note: In most situations, users with individual accounts cannot open cases.

1. On the Support site page header (callout 1, below) click **Cases, then** Open a Case. You can also click the **Open a Case** tile (callout 2) or click **Open a Case** in the top-right corner of any Support site page (callout 3).
   Note: To open a case in a new browser window or tab, right-click **Open a Case** (callout 3), and then pick the option for opening the page in a new window or tab, depending on your browser.

   The header is visible regardless of where you are in the Support site.

   Additionally, you can click **Manage Support Account > Product Resources** from the header, and then click **Open a Case** for your product in the My Products area.

2. Complete and confirm the form data in each section on the Open a Case page. Pay special attention to the following fields.
   Note: The fields on the Open a Case page may change depending on your situation.
3. In the *General* section:
   a. Select the **Type of support** you need. If you need help with a product manufactured by IBM, select **Product Support**. For all other cases, select **Other contracted support services**, and then click **OK** in the notification.
   b. Enter a **Case title**, to describe your case. The maximum length of the case title is 255 characters.
4. In the *Product Information* section:
   a. Select or search for your **Product Manufacturer**. This field automatically displays the manufacturer of product for the last case you opened, or you can choose from a list a list of the manufacturers you selected recently.
   b. In **Product**, enter either the product name or its machine type or model number.
      Note: The model number alone is not enough information to find the product. You must use the product name or machine type in addition to model number.
   c. If you do not see the product, select **I don't see my serial number or client asset identifier. I will enter it manually**, then enter the correct number or identifier, and then complete **Machine type** and **Machine model**. If you selected IBM as the product manufacturer, the serial number must be exactly 7 characters long.

      Note: Machine type and Machine model display only when opening hardware cases
   d. If applicable, select the **Service Type** needed for this case. The following types are available but may vary based on your product and contracts:
      - *Defect/BreakFix*: Help for situations when your product is not functioning correctly.
      - *Installation*: Issues related to the installation or decommissioning of products.
      - *Preventive Maintenance*: These cases include cleaning, machine inspections, and consumable part replacement. These are intended to extend the stability or lifespan of product or prevent failures by applying patches, code upgrades, or other solutions.
      - *Q&A*: General product questions.
      - *Health & Safety Check*: These cases verify the health & safety of the product or its operating environment.
      - *Move/Add/Change*: Relocating, upgrading and changing products, as well as software license transfers or modifications.
      - *Account Support*: Support services related to an account, but not typically to a specific product.
5. In the *Severity and Account Information* section:
   a. Select a **Severity**. Level 1 issues have a critical impact on your production environment. IBM works with you 24 hours, 7 days a week to resolve your problem, provided you have a technical resource available to work during those hours.
   b. Enter or search for your **Account**, or select it from the menu.
6. In the *Case Description* section, describe your problem in the **Description** field as clearly and completely as you can. Watson analyzes what you type and offers tips to enhance your description. If a solution is available, it displays alongside your description.

7. In the *Attachments and Team Members* section:
   a. If you have diagnostic files or screen captures, click Upload, then drag them into or search for them in the IBM File Uploader, and then click Upload**.**
   b. Enter an optional **Client Reference Number** for your case. This field allows you to track your case through your company's internal monitoring systems.
   c. Enter or confirm the **Case Contact Number**.
   d. To add team members to the case, search for them in the Add Team Members field. You can add team members to the case whether or not they are associated with your accounts. The people you add will be able to edit and comment on the case, and will only have access to the cases you add them to. For more information about adding team members, refer to Adding Team Members To New and Existing Cases .
   e. Select **Save your case as a template for later use**, and then enter a title for your new template to save this case's information and create cases more quickly in the future. For more information, refer to Working with Case Templates.
8. Click **Submit Case**. The Case Details page displays. This page includes your case number, which you will need for further contact with Support about this issue.

Opening Cases Through Support Chat

You can also open a case through support offered in a Watson chat. Click Chat with Support from any page in the Support site. In the chat window, send the keywords Open a case. After you confirm that you want to open a case, Watson brings you to the Open a case page and copies the transcript from your chat into the case description. Follow the previous steps to open the case.