IBM

IBM Customer

IBM Content Manager for Multiplatforms Install Package Service Description

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Information Management software

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1. Description of Services

IBM Enterprise Content Management ("ECM") is pleased to submit this Service Description to IBM Customer ("<IBM Cust>"). <IBM Cust> has requested the following services from IBM:

> ➢ IBM Content Manager for Multiplatforms ("CMMP") Install Package

This service provides the expert resources to install the CMMP software at your site. It also provides hands-on assistance to address questions, recap key issues covered in formal training classes, and to confirm that <IBM Cust>'s systems and resources are ready to begin applying the knowledge gained in class to <IBM Cust>'s business needs and operational requirements. The ECM consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed at other successful ECM installs. The completed install also verifies that the software is supportable by IBM's Support organization.

The scope of this Install Package is limited to the install and base configuration of CMMP[1].

This CMMP Installation Service will provide:

- Review of <IBM Cust>'s platform/architecture environment
- Install the following components:
    - One (1) Websphere Application Server & IBM HTTP Server
    - One (1) DB2 Universal Database & Administrator Client (optional)
    - One (1) Information Integrator for Content ("II4C")
    - One (1) Limited Content Manager Environment
    - One (1) CM Windows Client (thick Client)
    - One (1) CM Windows Admin Client
    - One (1) eClient or WEBi Client install
- Configure Sample Environment for Testing
- Demonstrate the System to the Project Team
- Project management and coordination to facilitate a successful and professional project delivery

This Install Package includes a set of tasks that <IBM Cust> must complete to facilitate a successful product installation and rollout. The actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the anticipated CMMP environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel that are required to successfully install and configure the CMMP software.

At the completion of the Install Package, <IBM Cust>'s system and resources will be ready for maintenance support and for initiating the process to configure the system for <IBM Cust>'s specific business requirements. This installation assumes individuals knowledgeable on IBM products will be performing the tasks to identify the

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[1] This service is limited to the installation or configuration of one Content Manager for MultiPlatforms environment consisting of one (1) Library Server and one (1) Resource Manager Server. Installation and configuration of any additional services other than those required as part of the installation of CMMP are considered additional options. Contact your local Lab Services Sales Manager ("LS SM") for pricing on any additional install services.

<IBM Cust> specific definition of the system after the completion of this project. These definition services are outside the scope of deliverables of this Install Package[2].

Any change in the scope of work defined in this Services Description requested by <IBM Cust> may result in additional costs and must be documented in a Project Change Request ("PCR").

2.   Required Product Training

As part of the delivery, <IBM Cust> is required to have at least one person successfully complete (or have successfully completed) the following IBM training. The IBM education required for this installation is as follows:

- Course Code: IM401 - IBM DB2 Content Manager V8 Implementation and Administration

Please note that IBM may offer an equivalent Instructor Led Online ("ILO") or self paced eLab course.   Any of these courses will satisfy this installation package training requirement.

The cost for these training courses is not included in this CMMP Package. Please refer to the IBM Learning Services Web site for detailed information regarding class cost, schedules, course descriptions, ordering options, registration instructions and relevant IBM Web site locations.

While the training defined in this service provides a good foundation for administering the system in a pre-production status, <IBM Cust> should not consider this the total set of training that their resources will need to manage their production system. The ECM Education Team can assist <IBM Cust> in obtaining a recommended training plan specific to <IBM Cust>'s requirements.

For individual training recommendations, please reference the ECM Training Paths.

For training recommendations for your entire organization, please request an Enterprise Training Plan or contact the ECM Education Team at ecmeduna@us.ibm.com or 800-455-7468.

IBM Learning Services Web Site:
        www.ibm.com/software/data/content-management/training.html

In the interests of quality education, IBM reserves the right to update training courses at any time.

3.   Resources

The <IBM Cust> Project Team will consist of the resources from the ECM Account Team, the <IBM Cust> technical staff and, when applicable, an IBM Business Partner. Examples of Project Team members are listed below.

3.1   ECM Team Resources

The ECM Project Lead coordinates the appropriate ECM resources as required.

The ECM Team typically includes the following members:

- Implementation Project Manager ("IPM") – typical IBM Project Lead
- Lab Services IT Specialist ("ECM Consultant")

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[2] Services to configure all site and user specific preferences can be accommodated by using CMMP Launch services. Contact your LS SM for options.

- Field Delivery Consultant ("FDC")

- Software Sales Representative ("SSR")

- Sales IT Specialist ("Sales ITS")

3.2 <IBM Cust> Team Resources

<IBM Cust> will need to identify internal personnel to fill the roles of the <IBM Cust> Project Team. <IBM Cust> is responsible for selecting a Project Lead to share lead responsibilities with the ECM Project Lead.

Depending upon, the project the <IBM Cust> Project Team may include any of the following members:

- Project Lead

- IBM CMMP System Administrator

- Windows/Unix Administrator (as necessary)

- Websphere Administrator

- LDAP Server Administrator

- Infrastructure Coordinator

- LAN Administrator

- DBA Administrator

4.   Role Definitions

<IBM Cust> will need to identify internal personnel to fill the roles as listed in Section 3, Resources. The following outlines the general roles for each of these individuals. Please note that additional resources may be required at various phases of the install. Likewise, not all of the individuals will necessarily be involved in this Install & Launch.

Project Lead - This individual will represent <IBM Cust> resources and provide project coordination in conjunction with the IBM Project Lead.

CMMP System Administrator or Web Master/Web Designer (1 to 3 people) - This individual will learn the administration functions necessary to oversee CMMP and will serve as the on-going administrator. Attending the designated training for this package is required and must be completed prior to the installation of the software. This individual will work closely with the ECM Consultants during installation and configuration of the IBM server and clients.

Websphere Administrator (1 to 2 people) – This individual will work closely with the ECM Consultants during the execution of the Websphere Application Server & HTTP Server installation for CMMP. These resources will provide technical insight into the current <IBM Cust> environment, as required, for the installation phase.

DBA (1 to 2 people) - This individual will work closely with the ECM Consultants during the execution of the database Server installation for CMMP. These resources will provide technical insight into the current <IBM Cust> environment, as required, for the installation phase.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate a successful Installation, <IBM Cust> has the responsibility to provide the following:

a.) Prerequisites

- All prerequisites must be met before IBM can begin the installation of the product.

- Hardware, software, and network configurations that meet ECM requirements for system size and performance for the purchased software. This includes:
  - Installation of the operating systems
  - Installation of a supported version of Oracle (if not using DB2) & client for CMMP
  - Installation of a supported LDAP solution for CMMP
  - Installation of a supported web browser for CMMP eClient
  - Installation/application of appropriate levels of patches to meet ECM's minimum requirements

- All prerequisite hardware and software have been installed onto <IBM Cust>'s designated server(s).

- Network check (verify server connectivity to network, addressing, correct protocol).

- Have attended the required prior to the installation of any ECM software as part of this implementation service.

- Downloaded the latest version of CMMP to <IBM Cust>'s environment.

b.) A Project Lead with sufficient authority to:
  - Represent <IBM Cust>'s interests
  - Serve as the focal point for all decisions and communications
  - Coordinate activities assigned to <IBM Cust> resources
  - Sign project-related documents

c.) Analysis/requirements gathering of business application rules, business application processes, and application security access as they pertain to the implementation of Content Manager for MultiPlatforms.

d.) Local system administrator(s) trained on the administration of ECM products to be installed, IBM Content Manager 8.

e.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the ECM Consultant during the installation, he or she will be responsible for expanding the CMMP configuration such as:

- Data types

- Item Types

- Users

- Security

f.) Product Subscription and Support Agreement in place through IBM.

g.) Adequate facilities for the ECM Consultants; including cubicles, desks, and telephone, hardware and Internet access service, and remote access (e.g. VPN).

h.) <IBM Cust> will make available all <IBM Cust> personnel required for this project in a timely manner. Any significant delays caused by <IBM Cust> personnel not being available or project prerequisites not

being met may result in schedule delays, which can impact the project sufficiently to require a Project Change Request addressing additional or extended IBM personnel requirements and additional costs. Specifically, AD & Exchange Resources.

5.2   IBM Responsibilities

a.) Review <IBM Cust>'s CMMP Architecture

b.) Provide CMMP Install Questionnaire

c.) Install

- One (1) Websphere Application Server & IBM HTTP Server

- One (1) DB2 Universal Database & Administrator Client

- One (1) Information Integrator for Content (II4C)

- One Limited Content Manager Environment

   - one (1) Library Server

   - one (1) Resource Manager Server

- One (1) CM Windows Client (thick Client)

- One (1) CM Windows Admin Client

- One (1) eClient or WEBi Client install

d.) Configure CMMP for Sample Environment

- One (1) sample item type

- Five (5) sample attributes

- Three (3) sample user group definitions

- One (1) sample workflow of Content Manager Document Routing (up to five steps)

e.) Test environment

f.) Perform System Administration Handoff

- Transfer of Information

- Routine Maintenance

- Backup Methodology

- Problem Reporting

g.) Demonstrate Product to the Project Team

h.) Provide <IBM Cust> a completed CMMP Installation Checklist

6.   Assumptions & Limitations

6.1   Assumptions

a.) The Installation and implementation of Tivoli Storage Manager is not included in the scope of this Install Package service.

b.) CMMP business-specific configuration is outside the scope of this Install Package.[3]

c.) A limited number of documents (10 documents) will be loaded into the system for testing purposes only.

d.) Installation of <IBM Cust>'s CMMP software will not be in a clustered environment. A chargeable PCR will be required to perform the installation in a clustered environment.

e.) Additional resources and time for the development of "custom applications" are not included in this Install Package.

6.2 Service Limitations

The CMMP Install Package does not include repairs, corrections or troubleshooting of performance degradation, data corruption, errors and faults that are discovered during the installation process due to hardware failures, or non-qualified hardware or operating systems. Repairs, corrections or troubleshooting of such errors and faults will be <IBM Cust>'s responsibility; any IBM involvement will be charged on a Time and Materials (T&M) basis.

ECM resources will be provided Monday through Friday from 8:00 a.m. to 5:00 p.m., excluding holidays and vacation time. Specific details regarding schedules will be mutually agreed-upon prior to the project start-date.

6.2.1 Travel & Living Expenses

This service includes domestic travel and living expenses incurred by ECM resources traveling to <IBM Cust>'s site in order to fulfill IBM's tasks and responsibilities pertinent to delivering this Install Package.

The IPM will initiate the project with a kickoff conference call. Any additional status meetings required will be held via conference calls as well. The ECM Consultant will travel to <IBM Cust>'s site for **one (1)** visit for tasks associated in delivering this implementation service.

Additional onsite assistance requested by <IBM Cust> beyond the amount specified in the above paragraph may be billable subject to the execution of a PCR. IBM also reserves the right to bill <IBM Cust> for any additional trips that are the direct result of <IBM Cust>'s failure to meet or perform its obligations outlined herein.

7. Project Tasks & Deliverables

The Project Team will perform the following tasks. Deliverables for each task are detailed within the task descriptions.

7.1 Task 1: Kickoff Meeting

The purpose of this meeting is to prepare both the <IBM Cust> team and the ECM team for the CMMP Install Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The ECM Project Lead will review the Install Package Service Description, the install tasks, and roles and responsibilities with <IBM Cust>'s Project Team.

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[3] Services to configure all site and user specific preferences can be accommodated by using CMMP Launch services. Contact your LS SM for options.

7.1.2 Define/Review Project Plan

Once selected, the project team develops a project plan that best fits <IBM Cust>'s installation needs (see the sample Project Plan). The plan is designed to complete the installation in the shortest possible timeframe. Each task is assigned a resource and a time window based on the effort required to complete the task. IBM strongly encourages the practice of joint task assignments as an excellent means of training and knowledge transfer for the team members.

7.1.3 Project Status

IPM will track all issues and document their resolution in an Issues Log. Any issue whose resolution requires a change will be documented in a PCR.

7.2 Task 2: Platform Architecture/Configuration Document & Review

The IBM IPM & Consultant will review the ECM software purchased, <IBM Cust>'s server configuration (hardware, operating system and site specific software), ECM specific network configuration, and <IBM Cust>'s System Diagram. This review will encompass the items indicated in the prerequisite document that was delivered to <IBM Cust> prior or during the kickoff meeting. Upon successful completion of <IBM Cust> portion of this document, the IPM will schedule the software installation at least two (2) weeks into the future.

7.3 Task 3: Software Installation

The ECM Consultant, with the assistance of <IBM Cust>'s CMMP System Administrator, schedules the software installation. <IBM Cust>'s Information Technology staff must review the release notes included on the software media, which provides the latest information regarding operating system software release levels and patches required for a successful software installation.

A member of <IBM Cust>'s IT staff must have attended the required training prior to this step. This assures appropriate system configuration choices and eases support transition to <IBM Cust>.

7.3.1 Install Websphere Application Server & IBM HTTP Server

WebSphere Application Server will be installed and configured to host two applications:,

- The Content Manager Resource Manager application (icmrm) and

- either the eClient Web application or WEBi.

7.3.2 Install DB2 Universal Database and Admin Client

DB2 UDB will be installed and configured to host two Content Manager databases, Content Manager Library Server database and Content Manager Resource Manager database.

7.3.3 Install Information Integrator for Content ("II4C")

Information Integrator for Content (II4C) will be installed and configured to connect to Content Manager v8 and provide Java libraries for implementation of either the Content Manager eClient or WEBi

7.3.4 Install Limited Content Manager Environment

The Content Manager Library Server is a database application composed of stored procedures. The Content Manager Resource Manager manages object storage and is composed of a Web Application and RM database.

7.3.5 Configure for Sample Environment

Upon completion of the installation, the ECM Consultant along with <IBM Cust>'s System Administrator will configure Content Manager using Content Manager Administration Interface for a sample environment implementing:

- One (1) sample item type

- Five (5) sample attribute

- Three (3) sample user group definitions

- One (1) sample workflow of Content Manager Document Routing (up to five steps)

7.3.6 Test

Once configured, testing will ensue to validate that the system is operational. The Project Team members can use this phase as a learning process to ensure they understand the complete installation and testing process of the CMMP system.

7.4 Task 4: System Administration Handoff

7.4.1 Transfer of Information

The ECM Consultant will review the product with the <IBM Cust> System Administrator to better prepare <IBM Cust> for further expansion of the system. The ECM Consultant will reinforce topics covered in the Learning Services courses as required in this Install Package. Topics to be reviewed:

- Start/stop and Management Content Manager infrastructure services
    - DB2 services
    - WebSphere Application and IBM HTTP Server Server
- Start/stop and Management of Content Manager system services
    - Content Manager Resource Manager
    - Content Manager eClient or WEBi

7.4.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <IBM Cust>'s System Administrator with respect to maintenance of the system. These are tasks that should be performed daily and will be specific to <IBM Cust>'s usage of the system and its configuration. IBM recommends that the System Administrator develop a schedule of "housekeeping" procedures and tasks to be performed. Some examples include:

- Backup/restore
- Review documentation and point available best practice for system maintenance
- DB2 maintenance

7.4.3 Review Backup Methodologies

The ECM Consultant will review possible backup strategies with the <IBM Cust> System Administrator. This Install Package does <u>not</u> provide for the ECM Consultant to analyze <IBM Cust>'s backup objectives nor does it develop the plan to meet those objectives

7.4.4 Problem Reporting

Before calling IBM Customer Support, full documentation of the problem at hand always expedites resolution and helps maintain internal system up-time records. The ECM Consultant will review troubleshooting and problem reporting procedures and provide a trouble report template to <IBM Cust>. Over time the <IBM Cust> CMMP System Administrator will learn to determine the nature of problems that arise will be able to resolve or report them as necessary.

For integrity issues, IBM requests that <IBM Cust> contact IBM Customer Support by using the IBM toll free Customer Service telephone number (1-800-429-7378).

7.5 Task 5: Demonstrate System to <IBM Cust> Project Team

After the initial samples have been tested, the system is demonstrated to the <IBM Cust> Project Team. The demonstration is an opportunity to share ideas on how to best configure the system, gather immediate feedback on issues that may have been overlooked, and solicit suggestions for system improvements. Other uses for the system are often identified in such meetings, giving impetus for follow-on projects. Such as:

- Import document
- Search document
- Retrieve and launch/view a document
- Create folder
- Export a document
- Execute simple workflow

7.6 Task 6: Project Completion

Upon demonstration of the product the ECM Consultant will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *Content Manager for MultiPlatforms Install Checklist*.

If issues arise after completion of the project, <IBM Cust> Project Team will attempt to resolve these problems independently or with the assistance of the IBM Product Support Center.