



IBM Customer ***IBM OmniFind Discovery
Edition Install & Fast Start
Package
Service Description***

January 2, 2009



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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 OmniFind Discovery Edition (“OmniFind”) Install & Fast Start Package

This service provides the expert resources to install the OmniFind 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 by other successful ECM installations. The completed installation also confirms that the software is supportable by IBM’s Support organization.

The scope of this Install & Fast Start Package is limited to the installation and support of OmniFind Discovery Edition¹.

This OmniFind Install & Fast Start Service will provide:

- Review of <IBM Cust>’s platform/architecture environment
- Document Analysis and Requirements Gathering for the creation of a Content Source Configuration Document
- Installation of the following:
 - One (1) OmniFind Discovery Edition
 - One (1) Management Console
 - One (1) XML Layout and one of the following
 - One (1) Default ASP.NET Layout or
 - One (1) Default JSP Layout
- Configure
 - One (1) OmniFind Project
 - One (1) Collection
 - Up to three (3) Content Sources
- Index Content²
- Validation of the Configuration
- Demonstrate User Interface
- Demonstrate the System to the Project Team
- Project management and coordination to facilitate a successful and professional project delivery

¹ This service includes the installation of (1) OmniFind Discovery Edition on one server, (2) one Management Console, (3) one XML Layout, and (4) one Default ASP.Net Layout or one Default JSP Layout. Installation and configuration of any additional services other than those defined as part of this Install & Fast Start service are considered additional options. Contact your Lab Services Sales Manager (“LS SM”) for any additional options.

² The ECM Consultant will select a subset of content which contains up to 100 documents of no more than 10 MG each in order for indexing to complete to use for testing purposes.

This Install & Fast Start 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 OmniFind 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 OmniFind software.

At the completion of the OmniFind Install & Fast Start 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 and expand the <IBM Cust> specific definition of the system after the completion of this project. Additional definition services beyond what is documented in this Service Description are outside the scope of deliverables of this Install & Fast Start Package³.

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. IBM education required for this installation is as follows:

- Course Code: IR300 - OmniFind Discovery Edition for Business Users
- Course Code: IR200 - OmniFind Discovery Edition: System Administrator

*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 OmniFind Discovery Edition Install & Fast Start 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 Services to configure additional site and user specific preferences can be provide in a Statement of Work. Contact your LS SM for options.

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”) –Project Lead
- Lab Services IT Specialist (“ECM Consultant”)
- Field Delivery Consultant (“FDC”)
- Software Sales Representative (“SSR”)
- Sales IT Specialist (“ECM 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 roles:

- Project Lead
- IBM OmniFind System Administrator
- User Interface Designer/Developer
- Infrastructure Specialist
- Business Lead Requirements Owner
- Database 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 installation. Likewise, not all of the individuals may necessarily be involved in this install service.

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

IBM FileNet System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the OmniFind system and will serve as the on-going administrator. Attending the System Administrator class is required and should be completed prior to the installation of the software. This individual will work closely with the ECM Consultant during installation and basic configuration of the IBM FileNet software.

DBA (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow ECM Consultants to perform their functions in the course of the installation when access to the database is required.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

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

- a.) Project Prerequisites
 - All prerequisites must be met before IBM can begin the installation of the product.
 - All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software. This includes:
 - Installation of the operating system
 - Installation of the customer-supplied database
 - Installation of the Web Application Server (i.e. IIS must be installed if using for ASP.Net –or- Apache Tomcat or Websphere must be installed for JSP).
 - Installation/application of appropriate levels of patches to meet IBM OmniFind's minimum requirements
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download the IBM FileNet OmniFind Discovery Edition software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
 - Have attended the required training prior to the installation of any ECM software.
- 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 installation of the OmniFind system. The outcome of this process is a System Design Document.
- d.) Local system administrator(s) trained on the administration of the ECM products previously installed.
- e.) After the <IBM Cust> OmniFind 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 completing the following items.
 - Creating additional OmniFind Projects
 - Defining and Indexing additional Collections & Content Sources
- f.) Local help desk personnel trained on the ECM client products to be installed at <IBM Cust>.
- g.) Adequate facilities for the ECM resources; including cubicles, desks, and telephone, hardware and Internet access service.
- h.) Product Subscription and Support Agreement in place through IBM.
- i.) <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 PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2 IBM Responsibilities

- a.) Review <IBM Cust>'s OmniFind Architecture
- b.) Configuration Requirements Gathering
 - Review of OmniFind Functionality
 - Define one (1) OmniFind Project which consists of:
 - One (1) collection
 - Up to three (3) content sources
 - Content Source Configuration Document
- c.) Install
 - OmniFind Discovery Edition on one (1) server
 - One (1) Management Console
 - One (1) XML Layout and one of the following:
 - One (1) ASP.NET Layout or
 - One (1) JSP Layout
- d.) Configure
 - One (1) OmniFind Project based upon the Content Source Configuration Document
 - One (1) collection
 - Up to three (3) content sources
- e.) Index Content⁴
- f.) Test & Validate Installation & Configuration
 - Test User Interface
- g.) Perform OmniFind Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- h.) Demonstrate Product to the Project Team
- i.) Provide <IBM Cust> a completed OmniFind Install & Fast Start Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) This OmniFind implementation is designated for English language use only.⁵

⁴ The ECM Consultant will select a subset of content which contains up to 100 documents of no more than 10 MG each in order for indexing to complete to use for testing purposes.

⁵ Services to configure other languages can be done through a Statement of Work. Contact your LS SM for options.

- b.) Installation of OmniFind Discovery Edition Install & Fast Start software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- c.) Additional resources and time for the development of “custom applications” are not included in this service.

6.2 Service Limitations

The OmniFind Discovery Edition Install & Fast Start Package does not include repairs, corrections or troubleshooting of performance degradation, data corruption, errors and faults that are discovered during the 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 up to two (2) visits for tasks associated in delivering this package service.

Additional onsite assistance requested by <IBM Cust> beyond the amount specified in the above paragraphs 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 OmniFind Discovery Edition Install & Fast Start 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 installation tasks, and roles and responsibilities with <IBM Cust>'s Project Team.

7.1.2 Define/Review Project Plan

Once selected, the Project Team customizes the sample project plan that best fits <IBM Cust>'s installation needs (see 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

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

7.3 Task 3: Document Analysis & Requirements Gathering

OmniFind can be configured in a variety of ways in order to meet the requirements of a given business. An adequate configuration that meets <IBM Cust>'s needs begins with valid business assumptions. The ECM Consultant discusses various business requirements with <IBM Cust> and develops a set of assumptions that the team employs during the launch activities. Prior to acceptance by the Project Team, <IBM Cust> reviews these assumptions for accuracy. Should these business assumptions change, the configuration may require changes, as well, to reflect the new assumptions.

The Install & Fast Start package is specially designed to ask the necessary questions and guide <IBM Cust> through the design and implementation process of an OmniFind system. The ECM Consultant will perform a data analysis in regards to the configuration of the OmniFind system to match the defined needs of the business utilization. Tasks include defining an OmniFind Project, collections, and content sources, and indexing identified data. The ECM Consultant will create a Content Source Configuration Document with the information gathered during this analysis⁶. This document will be used to communicate with <IBM Cust> personnel for additional information and clarification.

7.4 Task 4: Software Installation

The ECM Consultant, with the assistance of <IBM Cust>'s OmniFind System Administrator, schedules the server 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 Administrator training prior to this step. This assures appropriate system configuration choices and eases support transition to <IBM Cust>.

7.4.1 OmniFind Installation

Along with <IBM Cust>'s OmniFind System Administrator, the ECM Consultant installs the OmniFind software selecting a basic or custom installation based upon <IBM Cust>'s needs including either an ASP.NET or JSP Layout.

⁶ The ECM Consultant time required for performing the analysis and creating the Content Source Configuration Document should not exceed one (1) day.

7.5 Task 5: Configuration

7.5.1 Create OmniFind Project

Using the Management Console the ECM Consultant along with <IBM Cust>'s OmniFind System Administrator will create the initial OmniFind Project defining:

- Project Name/Description
- Project Language
- Rendering Technology
- Front-end Server

7.5.2 Define Collection

The collection consists of one or more content sources which have the same settings (features/metadata). The ECM Consultant and <IBM Cust>'s OmniFind System Administrator will define one (1) template and one (1) default layout. Specify:

- Collection name/description
- Template (non-Web content sources only)
- Default layout
- Usage (Web or non-Web content sources)

7.5.3 Configure Content Sources

The ECM Consultant and <IBM Cust>'s OmniFind System Administrator will review the Content Source options and select three (3) to configure for this Project. Content Sources other than those listed below are considered additional options and outside the scope of the Install & Fast Start service⁷.

Web Content Sources

Using the "spider" software the project team will find pieces of content to populate rows in the internal database. The spider will crawl through the entire Web site, following links and populating the internal database with the content from selected web site.

Specify:

- Start URL
- Accept/reject rules
- Settings
- Login Rules

Database Content Sources

Using the Management Console, configure the system to acquire content from a supported Database sources:

- ODBC
- Microsoft SQL

⁷ Services to configure additional content sources can be provided in a Statement of Work. Contact your LS SM for options.

- Oracle
- IBM DB2

Specify:

- Name of table
- Name of field
- Joining conditions

Filesystem Content Sources

Using the Management Console, configure the system to acquire content from a supported Filesystem source:

Specify:

- Start Location
- Settings
- Login Rules

7.5.4 Index Content

Once the content sources are configured, you must now build the content index using the Management Console.

The ECM Consultant will select a subset of content which contains up to 100 documents of no more than 10 MG each. This selection will allow indexing to complete in a timely manner in order to begin testing the system and to provide knowledge transfer.

7.5.5 Test

Upon completion of the configuration the ECM Consultant will perform initial testing to validate that the system is operational. The Project Team members can use this phase as a learning process to confirm they understand the complete installation and testing process of the OmniFind system.

Test the initial configuration validating:

- User Interface
- Query Interpretation
- Response Retrieval
- Response Presentation

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

The ECM Consultant will review the product with the <IBM Cust> OmniFind 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 required for this Install & Fast Start Package. Topics to be reviewed:

- Content Acquisition & Indexing
- Metadata Tuning
- Query Development
- Scoring & Content Retrieval

- User Interface

7.6.2 Routine Maintenance

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

- Checking system services
- Monitoring system usage
- Initiating system backup preparation
- Reviewing Insight Reports
- Scheduling Admin Process
- Securing the Installation

7.6.3 Review Backup Methodologies

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

7.6.4 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> System Administrator will learn to determine the nature of problems that arise and 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).

7.7 Task 7: 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.

7.8 Task 8: Project Completion

Upon demonstration of the product, the ECM Consultants will deliver to <IBM Cust> a completed Install & Fast Start Checklist which constitutes completion of this project. Please refer to *IBM OmniFind Discovery Edition Install & Fast Start 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.