IBM

IBM Customer *ECM Services for Lotus Quickr Install & Mentor Package Service Description*

January 1, 2011

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1. Description of Services

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 ECM Services for Lotus Quickr Install & Mentor Package

This service provides the expert resources to install the ECM Services for Lotus Quickr software at your site. This implementation will utilize either IBM FileNet Content Manager (P8 CM) or IBM Content Manager (CM8) as the content storage repository. 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 Delivery Consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed at other ECM installations. The completed install also verifies that the software is supportable by IBM's Support organization.

The scope of this Install & Mentor package is limited to the install and base configuration of ECM Services for Lotus Quickr[1].

This ECM Services for Lotus Quickr Installation Service will include the following activities:

- Review <IBM Cust>'s environment and confirmation of prerequisites
  - P8 CM or CM8[2] environment
  - Review where to deploy ECM Services for Lotus Quickr
  - WebSphere Application Server (instance 1) – to host ECM Quickr Services for Lotus Quickr
  - IBM Lotus Quickr 8.1.1 or 8.5
  - Existence of Lotus Quickr Connectors
- Review the Data Model
  - Review content management environment (P8 CM or CM8)
  - Review customer business requirements for ECM Services for Lotus Quickr
    - Document type mapping
    - Libraries
- Install the following components:
  - One ECM Services for Lotus Quickr
- Configuration:
  - Configure WebSphere shared Library (P8 only)
  - Configure LDAP Mapping (optional for CM8)
  - Configure ECM Services for Lotus Quickr for Linking and Document Type mapping (up to five Item Types and/or Document Classes)
  - Configure Quickr Web UI for Content Search (optional, if text search is configured on P8 CM or CM8)

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[1] This service is limited to the installation of the ECM Services for Lotus Quickr for one FileNet P8 Content Manager environment or one IBM Content Manager V8.4[1] FP1A environment. Installation and configuration of P8, CM V8.4, or Lotus Quickr or any additional services other than those required as part of the installation of ECM Services for Lotus Quickr are considered additional options. Contact your local Software Services Sales Leader for pricing on any additional install services.
[2] P8 CM 4.5 or CM8.4x must be installed, configured, and fully operational prior to the initiation of this Install & Mentor package.

- – Create up to three Libraries

- Verify Installation & Configuration Mentoring

    - – Load up to twenty documents from the desktop via Quickr Connectors and Quickr Web UI into the system for testing purposes.

    - – Link up to five existing documents in the P8 CM or CM8 repository into J2EE repository from Quickr Web UI.

    - – Configure one Library or Folder in P8 CM or CM8 to display in Quickr Web UI via Enterprise and/or Library Viewer

- System Administration Handoff

- Demonstrate the product to the project team

- Project management and coordination to facilitate a professional project delivery

This package includes a set of tasks that <IBM Cust> must complete to facilitate a 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 ECM Services for Lotus Quickr environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel that are required to install and configure the ECM Services for Lotus Quickr 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 <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[3].

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 complete (or have completed) the following IBM training. IBM education required for this installation is as follows:

If P8 CM:

- Course Code: F1420 – IBM FileNet P8 Platform Administration

If CM8:

- Course Code: IM52 - Content Manager Implementation and Administration

IBM may offer an equivalent Instructor Led Online (ILO) or Self Paced Virtual Course (SPVC). Any of these courses will satisfy this installation package training requirement.

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

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[3] Services to configure all site and user specific preferences can be accommodated by using a Statement of Work on a time-and-materials basis. Contact your Software Services Sales Leader for options.

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

3.1 ECM Software Services Team Resources

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

The IBM Team typically includes the following members:

- Project Manager (PM) – Project Lead
- IT Consulting Specialist (Delivery Consultant)
- Software Sales Representative (SSR)
- Sales IT Specialist (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 IBM Project Lead.

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

- Project Lead
- ECM Services for Lotus Quickr System Administrator
- IBM FileNet P8 CM or CM8 System Administrator
- IBM Lotus Quickr Administrator
- Windows and/or Unix Administrator (as necessary)
- Lotus Administrator
- 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 & Mentor package.

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

ECM Services for Lotus Quickr System Administrator or Web Master and/or Web Designer (1 to 3 people) - This individual will learn the administration functions necessary to oversee ECM Services for Lotus Quickr and will serve as the on-going administrator.

WebSphere Administrator (1 to 2 people) – This individual will work closely with the Delivery Consultants during the execution of the WebSphere Application Server & configuration for ECM Services for Lotus Quickr. This individual will provide technical insight into the current <IBM Cust> WebSphere environment and must be fully available when the Delivery Consultant is at <IBM Cust>'s site.

P8 CM or CM8 System Administrator (1 to 3 people) - This individual will be responsible for the administration functions and content management configuration schema of ECM Content Manager. This individual will also provide proper passwords to allow Delivery Consultants to perform their functions in the course of the installation when access to Content Manager is required. Attendance in the Administration classes is required and should be completed prior to the installation of the ECM Services for Lotus Quickr software. This individual will work closely with the Delivery Consultant during installation and configuration of the ECM Services for Lotus Quickr software and must be fully available when the Delivery Consultant is at <IBM Cust>'s site.

Lotus Quickr Administrator (1 to 3 people) - This individual will be responsible for the administration functions and the content configuration schema of the Lotus Quickr installation. This individual will also provide proper passwords to allow Delivery Consultants to perform their functions in the course of the ECM Services for Lotus Quickr installation when access to Lotus Quickr is required.

5.   Responsibilities

5.1   <IBM Cust> Responsibilities

In order to facilitate 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 IBM requirements for system size and performance for the purchased software. This includes:
    - Installation of a supported versions of:
        - P8 CM or CM8 environment
        - WebSphere Application Server (instance 1) – to host ECM Quickr Services for Lotus Quickr

- IBM Lotus Quickr 8.1.1 or 8.5

- Existence of Lotus Quickr Connectors

- All prerequisite hardware and software has been installed onto <IBM Cust>'s designated IBM servers

– To configure LDAP mapping between Quickr Web UI and P8 CM or CM8[4], ECM Services for Lotus Quickr and IBM Lotus Quickr (Portal Server) must use the same LDAP Server.

– Perform a network check (verify server connectivity to network, addressing, correct protocol).

– Complete the Environment Prerequisite Checklist

– Installation and application of appropriate levels of patches to meet ECM's minimum requirements

– Complete backup of Quickr & P8 CM or CM8 environments prior to initiating the installation.

b.) <IBM Cust> acknowledges that:

   i. Latest version of ECM Services for Lotus Quickr has been downloaded to the <IBM Cust>'s environment.

   ii. <IBM Cust> should have attended the training required in this Install & Mentor package prior to the installation of any ECM software as part of this implementation service.

   iii. Installation of <IBM Cust>'s ECM Services for Lotus Quickr software will not be in a -available manner (clustering and/or farming). A chargeable PCR will be required to perform the installation in a highly-available configuration.

   iv. Additional resources and time for the development of "custom applications" are not included in this Install & Mentor package.

c.) 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

d.) Analysis and requirements gathering of business rules, business processes, and security access as they pertain to the implementation of ECM Services for Lotus Quickr. <IBM Cust> must understand and be able to communicate your Lotus Quickr and Content Manager configuration schemas[5].

e.) Local system administrator(s) trained on the administration of P8 CM or CM8.

f.) After the <IBM Cust> ECM Services for Lotus Quickr System Administrator has observed the Delivery Consultant during the installation and configuration, he or she will be responsible for expanding the ECM Services for Lotus Quickr configuration.

g.) Product Support Agreement in place through IBM.

h.) Adequate facilities for the Delivery Consultants; including cubicles, desks, and telephone, hardware and Internet access service, and remote access (e.g. VPN). ECM Software Services recommends reserving a conference room and presentation projector for the week of the on-site visit.

i.) <IBM Cust> will make available all <IBM Cust> personnel required for this project based on the agreed-upon project schedule. Any significant delays caused by <IBM Cust> personnel not being available or

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[4] LDAP mapping between Quickr Web UI and P8 CM or CM8 is also known as Single Sign-On (SSO) between Quickr Web UI and P8 CM or CM8.
[5] This install service does not include the effort to perform the analysis and design to configure <IBM Cust>'s Lotus Quickr or Content Manager solutions. Those solutions must already be defined and implemented.

project prerequisites not being met may result in schedule delays, which can impact the project sufficiently to require a chargeable PCR addressing additional or extended IBM personnel requirements and additional costs. Specifically, AD & Exchange Resources.

5.2 IBM Responsibilities

The IBM responsibilities for this package include:

a.) Review <IBM Cust>'s ECM Services for Lotus Quickr Environment

- Deliver & Review *Environment Prerequisite Checklist*
- P8 CM or CM8
- Review where to deploy ECM Services for Lotus Quickr[6]
- WebSphere Application Server (instance 1) – to host ECM Quickr Services for Lotus Quickr
- IBM Lotus Quickr 8.1.1 or 8.5
- Existence of Lotus Quickr Connectors

b.) Review the Data Model

- Review Content Manager Environment
- Review customer business ECM Services for Lotus Quickr requirements
  - Document Type Mapping
  - Libraries

c.) Install

- One Content Manager Services for Lotus Quickr

d.) Configure

- WebSphere Shared Library (P8 only)
- LDAP Mapping (optional for CM8)
- IBM Lotus Quickr for Linking & Document Type mapping (up to five Item Types and/or Document Classes)
- Quickr Web UI for Content Search (optional, if content search is configured on P8 CM or CM8)
- Create up to three Libraries (CM8) or three (3) Document Classes (P8 CM)

e.) Verify the Installation and Configuration Mentoring

- Add & Browse Content via
  - Microsoft Office (Word, Excel, PowerPoint, Outlook)
  - Windows Explorer
  - Lotus Symphony, Notes, Sametime
- Publish link documents from Quickr
- Search documents from Quickr
- Load up to twenty documents from the desktop via Quickr Connectors and Quickr Web UI into the system for testing purposes.

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[6] IBM highly recommends deploying ECM Quickr Services on its own instance of the Websphere Application Server.

- Link up to five existing documents in the P8 CM or CM8 repository into J2EE repository from Quickr Web UI.

- Configure one Library or Folder in P8 CM or CM8 to display in Quickr Web UI via Enterprise and/or Library Viewer

f.) Perform System Administration Handoff

- Transfer of Information

- Routine Maintenance

- Backup Methodologies

- Problem Reporting

g.) Demonstrate the product to the project team

h.) Provide <IBM Cust> a completed ECM Services for Lotus Quickr Install Checklist

6. Limitations

6.1 Service Limitations

The ECM Services for Lotus Quickr 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.

IBM 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.

6.1.1 Travel & Living Expenses

This package does **not** include travel and living expenses incurred by IBM resources traveling to <IBM Cust>'s site in order to fulfill IBM's tasks and responsibilities pertinent to delivering this service.

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

IBM will invoice <IBM Cust> for travel and living expenses and other reasonable expenses incurred in connection with the package delivery. Amounts are due upon receipt of invoice and payable within 30 days. <IBM Cust> agrees to pay accordingly, including any late payment fee. <IBM Cust> does not have to pay any amount disputed in good faith while it is being investigated, but <IBM Cust> remains obligated to pay any amount not in dispute.

Additional on-site assistance requested by <IBM Cust> beyond the number of visits indicated above will be billable subject to the execution of a PCR. A visit is four or fewer days at your site by an IBM or IBM subcontract employee. 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 PM will initiate the project with a kickoff conference call. Any additional status meetings required will be held via conference calls as well.

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

7.1.1 Review Project Services Description

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

7.1.2 Define and Review Project Plan

Once selected, the joint <IBM Cust> and IBM Project Team customizes the sample project plan defining mutually agreed-upon dates for delivery (see Sample Project Plan). 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

PM 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: Environment Review

The ECM Software Services PM and 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 *Environment Prerequisite Checklist* that was delivered to <IBM Cust>. Upon completion of <IBM Cust>'s portion of this document, the SIM will schedule the software installation at least two weeks into the future.

- Review where to deploy ECM Services for Lotus Quickr
- LDAP Mapping

ECM Software Services recommends reviewing any questions arising from the completion of the *Environment Prerequisite Checklist* during the weekly status calls.

7.3 Task 3: Review the Data Model

The Delivery Consultant with the assistance of <IBM Cust>'s ECM Services for Lotus Quickr & Content Manager (P8 CM or CM8) System Administrators will review the Content Management storage solution in order to prepare for the ECM Services for Lotus Quickr installation. This effort includes:

- Review Content Manager configuration

o   Object Stores (P8 only)

- Understand customer business problem to

    o   Setup document type mapping during publishing

    o   Create libraries with appropriate security

7.4   Task 4: Software Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s ECM Services for Lotus Quickr 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 software installation.

The Delivery Consultant will install ECM Services for Lotus Quickr to publish documents to a P8 CM or CM8 system.

7.5   Task 5: Configuration Mentoring for a Sample Environment

Upon completion of the installation, the Delivery Consultant will configure and/or enable:

- WebSphere shared Library (P8 only)

- Single Sign-On (optional)

- Content Manager & Libraries

- ECM Services for Lotus Quickr for Linking & Document Type mapping (up to five Item Types and/or Document Classes)

- Quickr Web UI for Content Search (optional, if content search is configured on P8 CM or CM8)

- Create up to three Libraries

7.6   Task 6: Verify Installation

Once configured, verification and testing will ensue to validate that the system is operational. Verification & testing may include the following:

a.) Add & Browse Content via

- Microsoft Office (Word, Excel, PowerPoint, Outlook)

- Windows Explorer

- Lotus Symphony, Notes, Sametime

b.) Publish link documents from Quickr

c.) Search documents from Quickr

d.) Load up to twenty documents from the desktop via Quickr Connectors and Quickr Web UI into the system for testing purposes.

e.) Link up to five existing documents in the P8 CM or CM8 repository into J2EE repository from Quickr Web UI.

f.) Configure one Library or Folder in P8 CM or CM8 to display in Quickr Web UI via Enterprise and/or Library Viewer

7.7 Task 7: System Administration Handoff

7.7.1 Transfer of Information

The Delivery Consultant will review the product with the <IBM Cust> System Administrator to help prepare <IBM Cust> for further expansion of the system. The Delivery Consultant will reinforce topics covered in the Learning Services courses as required in this Install & Mentor package.

7.7.2 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, such as:

- Review resource limits
- Follow standard Content Manager backup policies

7.7.3 Review Backup Methodologies

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

- Follow standard WAS backup policies

7.7.4 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 Delivery Consultant will review troubleshooting and problem reporting procedures and provide a trouble report template to <IBM Cust>. Over time the <IBM Cust> ECM Services for Lotus Quickr 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 1-800-426-7378 or 1-800-IBM-SERV.

7.8 Task 8: 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.

7.9 Task 9: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *ECM Services for Lotus Quickr for IBM Content Manager or FileNet P8 Content Manager Install Completion Checklist*.

If issues arise after delivery of the Project Completion Checklist, <IBM Cust> should contact IBM Customer Support by using the IBM toll free Customer Service telephone number 1-800-426-7378 or 1-800-IBM-SERV.