



IBM Customer ***IBM InfoSphere Optim Install
Service Description***

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1. Description of Services

Information Management (IM) Software Services is pleased to submit this Service Description to IBM Customer (<IBM Cust>). <IBM Cust> has requested the following services from IBM:

- IBM InfoSphere Optim Install Package (Optim Install Package)

This service provides the expert resources to install InfoSphere Optim on a distributed development environment such as Linux, Unix or Windows (LUW) for one system at your site. It also provides hands-on assistance to address questions, recap key issues and to ensure that <IBM Cust>'s systems and resources are ready to begin applying the knowledge gained to <IBM Cust>'s business needs and operational requirements.

The Delivery Consultant will help guide <IBM Cust> with proven strategies and procedures that have been employed by other InfoSphere Optim installations. The completed installation also verifies that the software is supportable by IBM's Support organization.

The scope of the InfoSphere Optim Install Package is limited to the installation of the software and a base configuration in one LUW environment.

The InfoSphere Optim Install Package will:

- Review <IBM Cust>'s environment¹
- Install Optim Workstation on a Windows system
- Install Optim server in one distributed environment (Linux, Unix or Windows)
- Install Open Data Manager
- Validate the installation
- Perform basic Post-installation Product & Personal Options Configuration
 - Optim Workstation
 - Optim Server
 - Optim Open Data Manager
- Create InfoSphere Optim Installation Step by Step guide
- Demonstrate the System to the Project Team
- Deliver project management and coordination to facilitate professional project delivery
- Handoff the system to <IBM Cust>'s System Administrator

This Install Package includes a set of tasks that <IBM Cust> must complete to facilitate 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 Optim environment.

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

At the completion of the InfoSphere Optim 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

¹ Installation of prerequisite products (hardware and software) required for the InfoSphere Optim Product is <IBM Cust>'s responsibility. Please see the **Hardware/Software Requirements for InfoSphere Optim** document at: <http://publib.boulder.ibm.com/infocenter/idm/docv3/index.jsp>

to identify and expand the <IBM Cust> specific definition of the system after the completion of this Optim Install Package.

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 previously completed) the following IBM training to support the InfoSphere Optim installation and configuration. The IBM education required for this installation is as follows:

- Course Code: 3T292 – Implementing Optim Core Technology Workshop for Distributed Systems – Instructor Led Online

The cost for this training course is not included in this InfoSphere Optim Install Package. Please visit <http://www.ibm.com/training> for detailed information regarding course descriptions, class schedules, cost, ordering options, and registration instructions and other relevant IBM web site locations.

An IBM Education expert will contact you to discuss your interest in developing a custom training plan for your organization. This no fee assessment provides you with training recommendations that encompasses your entire team and includes cost saving strategies to help you get the most out of your training budget. Training recommendations are based on your team's roles and experience as well as your software products, training preferences and implementation schedule.

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

3.1 IBM Team Resources

The Optim Project Lead coordinates the appropriate Optim resources as required. The IM Team typically includes the following members:

- Solution Implementation Manager (SIM) – Optim Project Lead
- Information Management Consultant (Delivery Consultant)
- Services Sales Representative (Services Sales)
- Software Sales Representative (SSR)
- Technical Sales Specialist (TSS)

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 SIM Project Lead.

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

- Project Lead
- InfoSphere Optim Administrator
- Database, System, Network and Security Administrator(s)

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 Project. Likewise, not all of the individuals may necessarily be involved in this Install Package.

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

Database, System, Network & Security Administrator - These individual(s) provide on-going database and system administration assistance on the new Optim environment and will provide proper access to the system as necessary for the delivery of this Install Package.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate 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.

- Complete the *Optim Pre-installation Checklist (typicalinstallationchecklist.pdf)* and read the *Optim Configuration Guide (Config.pdf)*
- All hardware, software, and network configurations must meet InfoSphere Optim requirements for system size and performance for the purchased software as defined in the Environment Prerequisite Checklist. This includes:
 - Installation of the operating system
 - Installation and/or application of appropriate levels of patches to meet the InfoSphere Optim minimum requirements
- Download the InfoSphere Optim software from Passport Advantage to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility, including base levels and fixpacks.
- Obtain the appropriate client-specific license from <IBM Cust>'s IBM software account representative

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.) Local database administrator(s) able to fulfill the requests of the IBM installation team, especially when installing against a database other than the DB2 database bundled with InfoSphere Optim..

- d.) After the <IBM Cust> Optim System Administrator has observed the Delivery Consultant during the installation and has attended the proper training, he or she will be responsible for completing the following items.
- Add required Users or Groups
 - Make any required changes to Security
 - Create new data sources
 - Create Optim objects
 - Implementation of the InfoSphere Optim Solution
- e.) Adequate facilities for each Delivery Consultant including:
- cubicle, desk, telephone, and Internet access,
 - remote access (e.g., VPN access),
 - direct access to the keyboard.
- f.) When performing remote work, <IBM Cust> will provide VPN access into <IBM Cust>'s network and remote access to a workstation in the network that:
- can connect to all required servers and
 - is preloaded with all required connectivity tools appropriate to <IBM Cust>'s environment.
- g.) Product Subscription and Support Agreement in place through IBM.
- h.) <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 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.

5.2 IBM Responsibilities

- a.) Review the environment:
- Review the completed *Optim Pre-installation Checklist*
- b.) Install InfoSphere Optim product and the associated client
- c.) Install Open Data Manager
- d.) Perform Post-installation Configuration of the following components:
- InfoSphere Optim Workstation
 - InfoSphere Optim Server
 - InfoSphere Optim Open Data Manager
- e.) Create the InfoSphere Optim Step-by-Step Installation guide
- Installation instructions
 - Step-by-Step Screen Shots
- i.) Perform System Administration Handoff
- j.) Demonstrate Product to the Project Team
- k.) Provide <IBM Cust> a completed Install Package Completion Checklist.

6. Assumptions & Limitations

6.1 Assumptions

- a.) No production installation or implementation will be performed during this service.
- b.) Installation of InfoSphere Optim software will not be in a high-availability (HA) or disaster recovery (DR) environment.
- c.) This service does not include Database performance analysis, testing or tuning.
- d.) This service does not include Application performance analysis, testing or tuning.
- e.) This service does not include tuning outside of the Optim configuration.
- f.) This service does not include rebuilding database indexes and tables.
- g.) This service does not include correcting data issues associated with customer data. Standard data maintenance processes need to be executed as per Product documentation.
- h.) Reporting or report creation against archived data is not included in this engagement.
- i.) Resources and time for the development of “custom configurations” are not included in this service.
- j.) Development and / or testing of <IBM Cust> specific jobs, routines, analysis tasks, or any other standard project work are not included in this service.

6.2 Service Limitations

The InfoSphere Optim Install 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.

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.

6.2.1 Travel & Living Expenses

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

The Delivery Consultant may travel to <IBM Cust>'s site for two (2) visits for tasks associated with delivering this service. The Solution Implementation Manager may travel to <IBM Cust>'s site for one (1) visit for tasks associated with 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. 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 IBM team for the InfoSphere Optim Install Package delivery. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The SIM 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 Project Status

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

7.2 Task 2: Environment Review

This review will encompass the items indicated in the *Optim Pre-installation Checklist* that is delivered to IBM<IBM Cust>. Upon completion of <IBM Cust>'s portion of the document, the SIM will schedule the software installation.

Any questions arising from the completion of the *Optim Pre-installation Checklist* should be reviewed during the weekly status calls.

7.3 Task 3: Software Installation

The SIM, with the assistance of <IBM Cust>'s Information Technology (IT) staff, will schedule the software installation. <IBM Cust>'s IT 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 software installation.

A member of <IBM Cust>'s IT staff must have attended the prerequisite training, as defined in 2. Required Product Training, prior to this step to facilitate appropriate system configuration choices and ease support transition to <IBM Cust>.

7.3.1 Install InfoSphere Optim Product Components

With the assistance of <IBM Cust>'s Optim Administrators, the Delivery Consultant will install the InfoSphere Optim software for one LUW environment on the server and the client and install Open Data Manager.

7.3.2 Verify Installation

The installation is verified when:

- Optim can connect to the Database
- Optim can archive or extract up to 10,000 records as selected by the <IBM Cust>
- Optim can delete the same subset of records for a planned archived solution

7.3.3 Create the Step-by-Step Installation Guide

The Delivery Consultant will create a Step-by-Step guide detailing the components that were installed, the installation options used, the post-installation configuration, and the sanity-checks that were run to confirm appropriate operation. This document also contains a summary of system configuration options (e.g. installation locations, port numbers, and user accounts) and some appendices providing general maintenance and operations guidance for the system. As a whole, the document represents a baseline description of the installed system and a starting point for ongoing maintenance and modification of the system. IBM recommends keeping this document up-to-date for all follow-on InfoSphere Optim activities.

7.4 Task 4: Perform Product and Personal Options Post-Installation Configuration

The post-installation Product and Personal Options configuration will take place for the following product components using the Optim Configuration tools:

- InfoSphere Optim Workstation
- InfoSphere Optim Server
- InfoSphere Optim Open Data Manager

The Step-by-Step Installation Guide is updated with post-installation configuration.

7.5 Task 5: System Administration Hand-off

The Delivery Consultant will review the product with the <IBM Cust> Optim System Administrator to better prepare <IBM Cust> for further expansion of the system.

7.6 Task 6: Demonstrate System to <IBM Cust> Project Team

After the initial samples have been tested, IBM will demonstrate the InfoSphere Optim system to the <IBM Cust> Project Team. The demonstration is an opportunity to share ideas on how to best configure the system post-installation, 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.

7.7 Task 7: 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 *IBM InfoSphere Optim Install Package 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) or opening an electronic Ticket at:

IBM Support URL.