IBM

IBM Customer   **IBM FileNet Integral SDS Migration Mentoring Package Service Description**

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1. Description of Services

Enterprise Content Management (ECM) Software Services is pleased to submit this Service Description to IBM Customer (IBM Customer). IBM Customer has requested the following services from IBM:

> ➤ IBM FileNet Integral Single Document Storage (Integral SDS) Migration Mentoring Package for one of the following:
>   - IBM N-series
>   - IBM DR550
>   - Network Appliance SnapLock
>   - Sun 530 NAS series of storage devices
>   - Hitachi Content Archive Platform (HACP)
>   - EMC Centera

NOTE: The Integral SDS Migration Mentoring Package can only be sold to follow the ECM Software Services-delivered Integral SDS Install Package.

This service will provide IBM Customer's system administrator with the skills and knowledge necessary to manage the migration of optical media or MSAR to a protected storage device on their production system.

The Delivery Consultants will help guide IBM Customer on proven strategies and procedures that have been employed by other ECM Software Services deliveries. The actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the protected storage solution. Actual time line to complete the migration effort depends upon IBM Customer's optical hardware, system administrator's execution of the migration jobs, IS server and network environment, total number of documents to migrate, etc.

The scope of this package is limited to the Migration Mentoring for IBM FileNet Integral SDS[1].

This package includes a set of tasks that IBM Customer must complete to facilitate a migration mentoring.

The resources required for this project will include both the IBM and IBM Customer personnel that are required to migrate documents from Optical or MSAR storage to the selected protected storage device.

The Integral SDS Migration Mentoring Services will include the following activities:

- Review IBM Customer's requirements to migrate documents from Optical or MSAR to protected storage. [2]

- Perform migration analysis and develop a migration strategy for moving IBM Customer's documents to the new protected storage device.

- Mentor IBM Customer's system administrator(s) on migration "best practices" (how to execute, manage, and reconcile the migration effort).

- System Administration Handoff

- Demonstrate migration results to the project team

- Update the Integral SDS Operations Guide to include the Migration Procedures

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[1] The Integral SDS Migration Mentoring must follow the IBM FileNet Integral SDS Install Package in support of the protected storage devices listed above. This Migration Mentoring package does not include the installation of the Integral SDS software or upgrade of IBM FileNet Image Services (IS) 4.1 Service Packs. Installation or upgrades are considered out of scope.
[2] Installation of prerequisite products (hardware and software) required for the SDS Platform is IBM Customer's responsibility. Please see the *IBM FileNet Image Services, Image Services Resource Adapter, and Print Hardware and Software Requirements* document found on http://www-01.ibm.com/support/docview.wss?rs=3284&context=SSNVUD&uid=swg27010558.

- Project management and coordination to facilitate a smooth and professional project delivery.

Any change in the scope of work defined in this Services Description requested by IBM Customer 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 Customer is required to have at least one person complete the following IBM training. The IBM education required for this installation is as follows:

- F458G: – IBM FileNet Image Services (IS) System 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 Integral SDS Migration Mentoring 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.

While the training defined in this service provides a good foundation for administering the system in a pre-production status, IBM Customer 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 Customer in obtaining a recommended training plan specific to IBM Customer'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 Customer Project Team will consist of the resources from the ECM Software Services Account Team, the IBM Customer technical staff and, when applicable, an IBM Business Partner. Examples of Project Team members are listed below.

3.1 ECM Software Services Team Resources

The ECM Software Services Project Lead coordinates the appropriate ECM Software Services resources as required. The ECM Software Services 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 Customer Team Resources

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

Depending upon, the project the IBM Customer Project Team may include any of the following roles:

- Project Lead
- FileNet System Administrator
- System Operations Coordinator
- Protected Storage Device Administrator

4. Role Definitions

IBM Customer 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 project. Likewise, not all of the individuals may necessarily be involved in this service.

Project Lead - This individual will represent IBM Customer resources and provide project coordination in conjunction with the ECM Software Services Project Lead.

FileNet System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the FileNet system and will serve as the on going administrator. Attending the IS System Administration class is required and should be completed prior to the initiation of this service. This individual will work closely with the Delivery Consultant during migration and configuration of the Integral SDS server and clients.

5. Responsibilities

5.1 IBM Customer Responsibilities

In order to facilitate a delivery, IBM Customer has the responsibility to provide the following:

a. Project Prerequisites
   - All prerequisites must be met before IBM can begin the Migration Mentoring.
   - Completion of the ECM Software Services-delivered Integral SDS Install Package.
   - At least, the most recent version of IS 4.1.1 or higher is installed and properly configured. Improperly installed or incomplete system configuration may necessitate a chargeable PCR to this project if IBM Customer desires IBM to correct system deficiencies. [3]
   - Integral SDS and IBM Customer's protected storage device is already installed and working as expected.
   - Perform a network check (verify server connectivity to network, addressing, correct protocol).
   - All prerequisite hardware and software has been installed onto IBM Customer's designated ECM servers.
   - Have attended the required training prior to the installation of any ECM software.

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[3] This service is outside the scope of the Integral SDS Migration Mentoring Package. IBM can perform the IS Install for IBM Customer. IBM Customer will need to purchase the appropriate IS Install package.

b. IBM Customer acknowledges that:

    i. The effort to configure a "Cache Only" IS system (decommissioning an OSAR or MSAR) is not included in this Migration Mentoring package.

    ii. Integral SDS software has been implemented previously with the IBM FileNet Integral SDS Install Package and is working as designed.

    iii. Configuration of Integral SDS will not be in a highly-available manner (clustering and/or farming). A chargeable PCR may be required to perform the configuration in a highly-available configuration.

    iv. Additional resources and time for the development of "custom applications" are not included in this service.

c. A Project Lead with sufficient authority to:

- Represent IBM Customer's interests
- Serve as the focal point for all decisions and communications
- Coordinate activities assigned to IBM Customer resources
- Sign project-related documents

d. Local system administrator(s) trained on the administration of the IBM FileNet products previously installed.

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 Customer will provide VPN access into IBM Customer's network and remote access to a workstation in the network that:

- can connect to all required servers and
- is pre-loaded with all required connectivity tools appropriate to IBM Customer's environment.

g. Product Subscription and Support Agreement in place through IBM.

h. IBM Customer will make available all IBM Customer personnel required for this project based on the agreed-upon project schedule. Any significant delays caused by IBM Customer 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

The IBM responsibilities for this package include:

a. Provide project management and reporting.

b. Conduct a migration analysis, develop a migration strategy for moving IBM Customer's documents to the new protected storage device and document the migration strategy.

c. Create the migration process.

d. Mentor IBM Customer's System Administrator on how to execute, manage and reconcile the migration effort.

e. System Administration Handoff

- Transfer of Information

- Problem Reporting

    f.   Demonstrate the migration results to the project team.

    g.   Deliver updated Integral SDS Operations Guide to include the Migration Mentoring Procedures.

    h.   Provide IBM Customer a completed Integral SDS Migration Mentoring Checklist.

6. Limitations

6.1 Service Limitations

The Integral SDS Migration 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 Customer's responsibility; any IBM involvement will be charged on a Time-and-Materials (T&M) basis.

ECM Software Services 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 domestic travel and living expenses incurred by ECM Software Services resources traveling to IBM Customer's site in order to fulfill IBM's tasks and responsibilities pertinent to delivering this service.

The Delivery Consultant may travel to IBM Customer's site for **one** (1) visit for tasks associated with delivering this service. IBM Customer will be billed actual travel and living costs.

IBM will invoice IBM Customer 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 Customer agrees to pay accordingly, including any late payment fee. IBM Customer does not have to pay any amount disputed in good faith while it is being investigated, but IBM Customer remains obligated to pay any amount not in dispute.

Additional onsite assistance requested by IBM Customer 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 Customer for any additional trips that are the direct result of IBM Customer'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 Customer team and the IBM ECM Software Services team for the Integral SDS Project. Topics of discussion will include IBM Customer's requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The ECM Software Services Project Lead will review the Migration Mentoring package Service Description, the tasks, and roles and responsibilities with IBM Customer's Project Team.

7.1.2 Define and Review Project Schedule

Once selected, the joint IBM Customer and IBM Project Team customizes the sample project plan defining mutually agreed-upon dates for delivery (see Sample Project Plan). The plan is designed to complete the migration and mentoring in the shortest possible time frame. 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. The duration of the Integral SDS Migration is dependent on the number of documents and the availability of IBM Customer's System Administrator to perform the services.

The starting date to begin the Integral SDS Migration Mentoring for IBM Customer will be scheduled with the IBM ECM Software Services Install and/or Upgrade Team and the Delivery Consultants based upon the Support Team and resource availability.

7.1.3 Project Status

The 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: Migration Review

This portion of the service will assist IBM Customer with identifying the requirements for their Integral SDS Migration Mentoring. The Delivery Consultant will conduct a migration analysis and develop a migration strategy for moving IBM Customer's documents to the new protected storage device. The migration strategy will be documented in the updated Integral SDS Operations Guide.

7.3 Task 3: Document Migration Training

The Delivery Consultant will configure the archive jobs and migrate up to 10,000 documents while training IBM Customer personnel to perform the remainder of the migration.

The Delivery Consultant will provide technical support for the migration process and to analyze all archive job procedures, including a review of the Migration Logs, with IBM Customer's System Administrator.

The Delivery Consultant will validate the initial migration by retrieving 35 random documents from the migrated documents verifying the Integral SDS location information. The Delivery Consultant will also retrieve 10 documents from the protected storage device. Retrieval of the documents will constitute project completion.

Migration training includes the following:

- Archive procedure design
- Archive 10,000 documents with full training
- Migration procedures and user documentation for Migration Procedures
- Training
- Initial migration and image retrieval testing

- Ten hours of post-training telephone support[4] - This support will be accrued in sixty (60) minute minimum increments (maximum total of 10 calls). If IBM Customer requires additional technical support, IBM will issue a PCR and charge for support bi-weekly as incurred, at standard Lab Services technical support rates.

7.4 Task 4: System Administration Handoff

7.4.1 Transfer of Information

The Delivery Consultant will review the Integral SDS Migration and Procedures functionality with IBM Customer's system administrator(s).

7.4.2 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 Customer. Over time the IBM Customer 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 Customer contact IBM Customer Support by using the IBM toll free Customer Service telephone number 1-800-426-7378 or 1-800-IBM-SERV.

7.5 Task 5: Demonstrate Migration Results to IBM Customer Project Team

After the initial samples have been tested, the system is demonstrated to the IBM Customer 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.

7.6 Task 6: Integral SDS Operations Guide

The output of IBM's requirements gathering is an update to the Integral SDS Operations Guide to include the following information:

- Migration procedures
- User Documentation for Migration Procedures

7.7 Task 7: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to IBM Customer a completed Migration Mentoring Checklist which constitutes completion of this project. Please refer to *IBM FileNet Integral SDS Migration Mentoring Project Completion Checklist.*

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

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[4] Additional telephone support may be purchased. Please contact your Software Sales Service Leader for options.