IBM Customer

IBM WebSphere Application Server for ECM Install 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 Cust>). <IBM Cust> has requested the following services from IBM:

> ➢ IBM WebSphere Application Server for ECM (WAS for ECM) Install Package

NOTE: The WAS for ECM Package can only be sold in conjunction with an ECM Software Services - delivered IBM FileNet Content Manager Install Package, IBM Content Manager Enterprise Edition Install Package, IBM Content Manager OnDemand for Multiplatforms Install Package, or their corresponding Secondary Install Services.[1]

This service provides the expert resources to install the WebSphere Application Server software at your site to support an IBM FileNet P8 Content Manager (P8 CM), IBM Content Manager Enterprise Edition (CM8), or IBM Content Manager OnDemand for Multiplatforms environment that does not include any WebSphere "Farms" or "Clusters". 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 installation and configuration of the limited use "Base" WebSphere Application Server software as indicated in your ECM software license agreement[2].

This WAS for ECM Install Package will provide:

- Review <IBM Cust>'s environment

- Install one (1) instance of WebSphere Application Server

- Install IBM HTTP Server software (for CM8 only)

- Project management and coordination to facilitate a professional project delivery

This Install Package includes a set of tasks that <IBM Cust> must complete to facilitate a product installation and rollout.

The resources required for this project will include both the IBM and <IBM Cust> personnel that are required to install and configure the WebSphere Application Server software for an ECM implementation.

At the completion of the Install Package, <IBM Cust>'s system and resources will be ready for maintenance support.

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

- Course Code: WA170 – IBM WebSphere Application Server V7 Administration on AIX

    or

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[1] Contact your Software Services Sales Leader (SS SL) for assistance in verifying all required services installation needs.
[2] This Install Package includes the installation of one instance of "base" IBM WebShere Application Server software.   A Network Deployment of WebSphere Application Server is not included in this Install Package. Installation and configuration of any additional services or servers other than those required as part of the Install Package are considered additional options. Contact your Software Services Sales Leader (SS SL) for pricing for any additional services.

- Course Code: WA370 – IBM WebSphere Application Server V7 Administration on Windows or Linux

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

The cost for training courses is not included in this WebSphere for ECM Software Services 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.

The ECM Software Services 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 WebSphere Training Paths or ECM Training Paths.

For training recommendations for your entire organization, please request an Enterprise Training Plan or contact the ECMSoftware Services 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 Software Services 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 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:

- Solution Implementation Manager (SIM) – typical IBM Project Lead
- Software Services IT 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 ECM Software Services Project Lead.

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

- Project Lead
- WebSphere Administrator
- Operating System Administrator

- LDAP Administrator

- Infrastructure Coordinator

- LAN 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.

Websphere Administrator (1 to 2 people) – This individual will work closely with the Delivery Consultants during the execution of the Websphere Application Server & HTTP Server (CM8 only) installation for ECM. These resources will provide technical insight into the current <IBM Cust> environment, as required, for the installation phase.

Operating System Administrator (1 to 2 people) - This individual will work closely with the Delivery Consultants during the execution of the WAS server installation providing the appropriate passwords, files systems, and other details as needed.

LDAP Administrator (1 to 2 people) - This individual will work closely with the Delivery Consultants during the execution of the WAS server installation providing the appropriate passwords, user and group creations, and other details as needed.

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 WebSphere for ECM requirements for system size and performance for the purchased software. This includes:
  - Installation of the operating system[3]
  - Installation and/or application of appropriate levels of patches to meet WebSphere's minimum requirements
- All prerequisite hardware and software have been installed onto <IBM Cust>'s designated server.
- Network check (verify server connectivity to network, addressing, correct protocol, open ports).
- Ensure ports are open for WAS operation
- Download WebSphere Application Server included in the ECM-bundled software to <IBM Cust>'s environment.

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[3] ECM product minimum requirements may be higher than WAS minimum requirements. IBM will need <IBM Cust> to implement the minimum requirements for the ECM product to be installed.

- Complete the Environmental Prerequisite Checklist

- 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

b.) Local system administrator(s) trained on the administration of WebSphere products to be installed to support the ECM installation.

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

d.) Adequate facilities for the Delivery Consultants including:

- cubicles, desk, telephone, and Internet access

- dedicated access to the keyboard,

- remote access (e.g. VPN access)

e.) 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 pre-loaded with all required connectivity tools appropriate to <IBM Cust>'s environment.

f.) <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 <IBM Cust>'s ECM Environment

- Deliver & Review *Environment Prerequisite Checklist*

b.) Install

- One (1) instance of WebSphere Application Server

- One (1) IBM HTTP Server (CM8 only)

c.) Test environment

d.) Perform System Administration Handoff

- Transfer of Information

- Basic Backup Methodology

- Routine Maintenance

- Problem Reporting

e.) Provide <IBM Cust> a completed WebSphere Application Server Installation Checklist

6.   Assumptions & Limitations

6.1   Assumptions

a.) Installation of <IBM Cust>'s WebSphere software will not be in a WebSphere "Cluster", "Farm" or WebSphere Network Deployment controlled environment.

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

c.) Deployment of applications and the configuration of administrative or user security is not included in this Install Package.

d.) The Delivery Consultant will have direct access to the workstation key board to perform the installation and will not be working through an intermediary.

e.) Installation and configuration for WebSphere and IBM HTTP server (CM8 only) is considered complete when the administrative consoles can be accessed and the WebSphere Snoop applet can be executed.

6.2   Service Limitations

The WebSphere for ECM 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 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.

6.2.1 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 SIM 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 will travel to <IBM Cust>'s site for **one (1)** visit for tasks associated with delivering this Install Package.

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 purpose of this meeting is to prepare both the <IBM Cust> team and the ECM Software Services team for the WebSphere for ECM Install 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 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

SIM 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 IBM SIM & Consultant will review the WebSphere 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.

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

7.3 Task 3: Software Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s 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 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 Software

The Delivery Consultant will install and configure the following to host an ECM application:

- One instance of WebSphere Application Server

- IBM HTTP Server (CM8 only)

7.3.2 Test

Once installed and configured, the Delivery Consultant will navigate to multiple pages within the WebSphere administrative Console application and load the WebSphere Snoop applet to verify that the server is operational. Additional testing will occur as the P8 or CM8 platform is installed and tested.

7.4   Task 4: System Administration Handoff

7.4.1 Transfer of Information

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

- Start and stop WebSphere infrastructure services

  - Start and Stop WebSphere server

  - Start and Stop IBM HTTP Server (CM8 only)

  - Access the WebSphere Administration Console

  - Review critical log file locations

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:

- Review documentation and best practices for system maintenance

7.4.3 Basic Backup Methodology

The Delivery Consultant will review basic backup strategies with the <IBM Cust> System Administrator. This Install Package does <u>not</u> provide for the Delivery 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 Delivery Consultant will review troubleshooting and problem reporting procedures and provide a trouble report template to <IBM Cust>. Over time the <IBM Cust> WebSphere 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.

7.5 Task 5: 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 the *IBM WebSphere Application Server for ECM 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.