



IBM Customer *IBM FileNet Content Services
Install Package
Service Description*

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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 FileNet Content Services (“CS”) Install Package

This service provides the expert resources to install the CS software at <IBM Cust>’s site. It also provides hands-on assistance to address any 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 Field Delivery Consultant (“FDC”) will help guide <IBM Cust> on proven strategies and procedures that have been employed at other successful ECM installations. The completed installation also verifies that the software is supportable by IBM’s Product Support organization.

The scope of this Install Package is limited to the installation and base configuration of CS¹.

This Install 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 CS 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 CS software.

At the completion of the CS 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 ECM 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.

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. The IBM education required for this installation is as follows:

- Course Code: F265 – CS System Administration

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 CS Install 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 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.

¹ The CS Install Package includes 1 (one) Content Services server and 1 (one) IDM Web Services server. Installation and configuration of any additional services other than those required as part of the installation of the CS are considered additional options.

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> Installation 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 (“Sales ITS”)

3.2 <IBM Cust> 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
- FileNet System Administrator
- Web Master/Web Designer
- System Operations Coordinator
- Client Desktop Coordinator
- LAN Administrator
- Database Administrator
- Document/Records Manager
- Document Entry Supervisor
- End-User Manager

3.3 Non-IBM ECM Consultant Resources Required

A “non-IBM ECM Consultant” resource will be responsible for conducting the document analysis, system planning, and analysis for <IBM Cust>’s CS application. This resource would also be responsible for developing a System Design Document that reflects the results of these analysis tasks.

In some cases the “non-IBM ECM Consultant” may be an individual who is on <IBM Cust>’s staff and has been assigned this responsibility for this Installation. IBM strongly recommends that this resource be someone who is an IBM FileNet Certified Professional (“FCP”) Administrator.

4. Role Definitions

<IBM Cust> will need to identify internal personnel to fill the roles as listed in Section 2, 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 Installation.

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

FileNet System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the CS system, and will serve as the on-going administrator. This individual will work closely with the FDC during installation and 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 the FDC to perform his/her 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 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.
- 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/application of appropriate levels of patches to meet ECM’s minimum requirements
- Perform a network check (verify server connectivity to network, addressing, correct protocol).
- Download the CS software to the appropriate servers prior to the resource arriving at <IBM Cust>’s facility.

b.) Download the CS software to prior to the resource arriving at <IBM Cust>’s site 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 implementation of the CS system. The outcome of this process is a System Design Document.
- d.) After the <IBM Cust> System Administrator has observed the FDC during the installation, he or she will be responsible for completing the following items.
 - Expansion of Security Schema
 - Expansion of Users/Groups
 - Creation of Additional Custom Properties
- e.) Local help desk personnel trained on the ECM client products to be installed at <IBM Cust>.
- f.) Adequate facilities for the ECM Resources; including cubicles, desks, and telephone, hardware, and internet access service.
- g.) Product Subscription and Support Agreement in place through ECM.
- h.) <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 the <IBM Cust>-supplied System Design Document
- b.) Software Installation
 - Install Content Services Software
 - Install IBM FileNet Web Services
 - Install IBM FileNet Web based Administration Tool
 - Install IBM FileNet Desktop and IBM FileNet Toolkit (one workstation), if purchased
- c.) Configure Content Services Software
 - Create an initial user/group profile (one)
 - Create an initial custom property (one)
 - Create an initial document class (one)
- d.) Test Content Services System
 - Search
 - Check in/out
 - Display
- e.) Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting

- f.) Demonstrate the Content Services System to <IBM Cust> Project Team
- g.) Deliver P8 Platform/Architecture Configuration Document
- h.) Provide <IBM Cust> a completed Content Services Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) Installation of the CS software will not be in a clustered environment. A chargeable PCR will be required to perform the installation in a clustered environment.
- b.) Additional resources and time for the development of “custom applications” are not included in this Installation.

6.2 Service Limitations

The CS 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.

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 FDC will travel to <IBM Cust>’s site for **one (1)** visit for tasks associated in delivering this package service.

Additional onsite assistance requested by <IBM Cust> beyond the amount specified in the above paragraph 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 CS Installation 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

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 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 Platform/Architecture Configuration Document that was delivered to <IBM Cust> during the kickoff meeting. Upon successful completion of <IBM Cust> portion of the document, the IPM will schedule the software installation at least two (2) weeks into the future.

At this time, the ECM Install Team will also review the <IBM Cust> or Partner-supplied System Design Document with the <IBM Cust> Project Team with regard to overall CS system design.

7.3 Task 3: Software Installation

The FDC, with the assistance of <IBM Cust>'s Information Technology staff, 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.

7.3.1 CS Installation

The FDC installs the CS software. The FDC configures the system, the initial users, and object data structures. Once the system is able to accept objects for storage the FDC performs initial testing to validate that the CS system is operational. The Project Team members can use this phase as a learning process to confirm they understand the installation and testing process of the CS system.

7.3.2 Web Services Installation

The FDC installs the IDM Web Services software and configures the system. Initial testing is performed to confirm that all systems are operational.

7.3.3 Web Based Administration Tool Installation

The FDC will install the Web based Administration Tool.

7.3.4 Client Software Installation

The FDC installs the IDM Desktop software (if purchased) on one <IBM Cust> client workstation. This installation and test of the client software validates the target workstation and confirms that <IBM Cust> can communicate with the appropriate CS System via the LAN. Upon successful installation of the initial workstation, <IBM Cust>'s

PC Coordinator assumes responsibility for installing the remaining clients and testing the LAN/WAN connectivity of the client software.

7.4 Task 4: <IBM Cust>'s System

7.4.1 Initial Security Setup

The FDC defines one user/group profile based upon <IBM Cust>-supplied information.

7.4.2 Initial Custom Property & Document Class Setup

The FDC will install and test one document class and one property for the validation of system readiness. Once the initial objects have been placed under CS system control, object method functionality (check-in, checkout, retrieval and printing) is validated.

The Project Team members can use this phase as a hands-on learning process to confirm they understand the database setup, modification, and testing process of the CS system.

7.4.3 Load Sample Objects

Once the CS system has been configured, <IBM Cust> will supply several sample objects. These are loaded into the system, with the security privilege and properties denoted by <IBM Cust>.

7.4.4 Test CS System

Once sample documents are loaded into the system, the FDC and the <IBM Cust> System Administrator will execute a set of routine business processes with the samples. Examples include:

- New document creation
- Document revision with new version
- Document access changes
- Document search, copy, view and print functions

7.5 Task 5: Client Workstation Testing

After the system is fully operational, the <IBM Cust> Project Team will assume responsibility for Client Workstation testing to confirm client interaction with the CS system is operating as expected for out-of-box functionality.

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

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

- Entering document class definitions data into the system as part of the configuration.
- Entering document property definitions into the system as part of the configuration.
- Entering security profile definitions data into the system as part of the configuration.

7.6.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <IBM Cust>'s System Administrator with respect to maintenance of the CS system. These are tasks that should be performed daily and will be specific to <IBM Cust>'s usage of the CS 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 Content Services system backup preparation
- Checking the event log
- Checking Content Services system administration log
- Checking the amount of free space on all shelves

7.6.3 Review Backup Methodologies

The FDC will review possible backup strategies with the <IBM Cust> System Administrator. This Install Package does not provide for the FDC 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 FDC 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 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: Platform/Architecture Configuration Document

As <IBM Cust> tests the system, the FDC will provide <IBM Cust> with the completed Platform/Architecture Configuration Document, which includes the <IBM Cust>-supplied data as well as the installed IBM FileNet software versions and patches. This document represents a starting point for on-going maintenance and modification of the system.

<IBM Cust> should include this document with the final System Design Document.

7.9 Task 9: Project Completion

Upon demonstration of the product the FDC will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *Content Services Install 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.