



IBM Customer *IBM FileNet Email Manager
Install & Mentor Package
Service Description*

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Table of Contents

1. DESCRIPTION OF SERVICES	1
2. REQUIRED PRODUCT TRAINING	1
3. RESOURCES	2
3.1 ECM TEAM RESOURCES	2
3.2 <IBM CUST> TEAM RESOURCES	2
4. ROLE DEFINITIONS	3
5. RESPONSIBILITIES	3
5.1 <IBM CUST> RESPONSIBILITIES	3
5.2 IBM RESPONSIBILITIES	4
6. ASSUMPTIONS & LIMITATIONS	5
6.1 ASSUMPTIONS	5
6.2 SERVICE LIMITATIONS	5
6.2.1 Travel & Living Expenses	5
7. PROJECT TASKS & DELIVERABLES	5
7.1 TASK 1: KICKOFF MEETING	5
7.1.1 Review Project Services Description	6
7.1.2 Define/Review Project Plan	6
7.1.3 Project Status	6
7.2 TASK 2: PLATFORM/ARCHITECTURE MEETING & REVIEW	6
7.3 TASK 3: SOFTWARE INSTALLATION	6
7.3.1 Email Manager Server Installation	6
7.3.2 Email Manager Client Installation	7
7.4 TASK 4: CONFIGURATION SAMPLES & MENTORING	7
7.4.1 Task Routes	7
7.4.2 Client Workstation Testing	7
7.5 TASK 5: SYSTEM ADMINISTRATION HANDOFF	7
7.5.1 Transfer of Information	7
7.5.2 Routine Maintenance	7
7.5.3 Review Backup Methodologies	7
7.5.4 Problem Reporting	7
7.6 TASK 6: DEMONSTRATE SYSTEM TO <IBM CUST> PROJECT TEAM	8
7.7 TASK 7: PROJECT COMPLETION	8

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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 Email Manager (“EM”) Install and Mentor Package

This service provides the expert resources to install the EM software at your site. It also provides hands-on assistance to address questions, recap key issues, and to confirm 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 ECM Consultants 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 support of EM¹.

- Review current ECM and Email system configurations
- Review Design Requirements
- Install one (1) EM Server
 - Configure up to five (5) sample EM Collectors
 - Configure up to five (5) sample Task Routes
- System Administration Handoff
- Demonstrate the System to the <IBM Cust> Project Team
- Deliver project management and coordination

This Install Package includes a set of tasks that <IBM Cust> must complete to facilitate a successful product base configuration and rollout. The duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the anticipated EM environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel necessary to successfully install and configure the EM software. The success of this project depends on availability of key <IBM Cust> resources to assist in the ECM Consultant’s understanding of the business requirements.

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: F984 – Email Manager 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.

¹ The EM Install & Mentor package includes integration for Microsoft Exchange, GroupWise or Lotus Notes only. Contact your local Lab Services Sales Manager (“LS SM”) for pricing on any additional services.

The cost for this training course is not included in this Service. 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.

While the training defined in this service provides a good foundation for preparing the system to 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> 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 Consultant (“ECM Consultant”)
- Field Delivery Consultant (“FDC”)
- Software Sales Representative (“SSR”)
- Sales IT Specialist (“Sales 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 Project Lead.

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

- Project Lead
- IBM ECM System Administrator
- Email System Administrator
- System Operations Coordinator

- Client Desktop Coordinator
- LAN Administrator
- Database Administrator
- Document/Records Manager
- Document Entry Supervisor

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 installation. Likewise, not all of the individuals will necessarily be involved in this Install.

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

Content Manager (CM) System Administrator (1 to 3 people) - This individual is responsible for the administration functions of the CM system and serves as the on-going administrator. This individual will work with the ECM Consultant during installation and configuration of the Email Manager product.

Email Manager System Administrator or Web Master/Web Designer (1 to 3 people) - This individual will learn the administration functions necessary to oversee the IBM FileNet Email Manager system, and will serve as the on-going administrator. ECM strongly recommends that this individual become familiar with the ECM products by enrolling in ECM classes prior to project initiation. This individual will work closely with the ECM Consultant during installation and configuration of the EM software.

DBA (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow ECM Consultants to perform their functions in the course of the installation when access to the database is required.

Email Administrator (1 person) – This individual will assume responsibility for <IBM Cust>'s email server. This individual will also provide proper passwords for ECM Consultants to perform their functions in the course of the installation when access to the email server is required.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate a successful Implementation, <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 EM software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.

- Provide access, PRIOR to the project kick-off meeting, to all pertinent <IBM Cust> documentation, including written and electronic copies of all development and system standards which may constrain or affect the EM Install and Mentor project.
 - Have attended the required training prior to the installation of any ECM software.
 - Software prerequisites found on the installation CD.
- 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 system administrator(s) trained on the administration of ECM products already installed at <IBM Cust>.
- d.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the ECM Consultant during the installation, he or she will be responsible for expanding the system post-installation.
- e.) Local help desk personnel trained on the ECM products to be installed at <IBM Cust>.
- f.) Product Subscription and Support Agreement in place through IBM.
- g.) Adequate facilities for the ECM Resources; including cubicles, desks, and telephone, hardware, and internet access service.
- 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 a PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2 IBM Responsibilities

- a.) Review current FileNet and Email system configuration
- b.) Install one (1) Email Manager Server
- Configure up to five (5) sample Email Manager Collectors
 - Configure up to five (5) sample Task Routes
- c.) Perform System Administration Handoff
- Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- d.) Demonstrate the EM System to <IBM Cust> Project Team
- e.) Provide <IBM Cust> a completed EM Install & Mentor Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) Installation of the EM software will not be in a clustered environment. A chargeable PCR will be required to perform the installation in a clustered environment.
- b.) The Microsoft Exchange, GroupWise or Lotus Notes email solution has been fully implemented and is operational.
- c.) Linking to customer records within CRM or ERP systems is considered out of scope for this package.
- d.) Additional resources and time for the development of “custom applications” are not included in this Install & Mentor Package.

6.2 Service Limitations

The EM Install & Mentor 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.

Outstanding Product Support cases impacting functionality or operational status of the IBM FileNet Content Engine or IBM FileNet Content Services system will impact the ability to implement EM.

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 ECM Consultant will travel to <IBM Cust>'s site for **one (1)** visit for tasks associated in delivering this implementation 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 Email Manager Install & Mentor Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, scope, and schedules.

7.1.1 Review Project Services Description

The IPM 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 works on the development of a custom project plan that best fits <IBM Cust>'s installation needs (see the 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

The 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 Meeting & Review

The team will review the ECM software purchased, <IBM Cust>'s the technical environment and system architecture, ECM specific network configuration, and <IBM Cust>'s System Diagram.

Meeting Agenda:

- Platform/Architecture Configuration Document
- Email System
- IBM FileNet System (CM or Content Services)
- Database System
- Prerequisites
- Administrator contacts

Scope impacts to technical exercises will be discussed as identified to update resources required for the implementation activities.

7.3 Task 3: Software Installation

The ECM Consultant, with the assistance of <IBM Cust>'s Information Technology staff, 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 successful software installation.

7.3.1 Email Manager Server Installation

The ECM Consultant installs the EM server process to an identified server. The server process will be configured for the IBM FileNet Repository, the Exchange, GroupWise or Lotus Notes Server in use, and the public folders or mailboxes to monitor.

The ECM Consultant will implement Task routes to all email arriving at a test user's inbox to determine if an email should be added to the ECM Repository. Once the system is able to accept objects for storage the ECM

Consultant performs initial testing to validate that the EM system is operational. The Project Team members can use this phase as a learning process to confirm they understand the complete installation and testing process of the EM system.

7.3.2 Email Manager Client Installation

The ECM Consultant will install one EM Client. The EM Microsoft Outlook Add-in will be installed on an Outlook client or the EM Client will be integrated with a Lotus Notes client depending upon the email system in use. This software allows the end-user to select which emails should be added to the ECM Repository, use Client Profiles, and provide metadata at time of capture.

7.4 Task 4: Configuration Samples & Mentoring

7.4.1 Task Routes

The ECM Consultant will configure up to five sample task routes as a means of knowledge transfer and mentoring. The task routes will identify which emails should be captured, in addition to where and how an email and its attachments are added to the IBM FileNet Repository. The task routes will also define what email properties will be mapped to document class attributes, what post-capture email processing to execute, and what security settings should be defined.

7.4.2 Client Workstation Testing

After the system is fully operational, the <IBM Cust> Project Team will assume responsibility for Client testing to confirm client interaction with the EM system is operating as expected.

7.5 Task 5: System Administration Handoff

7.5.1 Transfer of Information

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

7.5.2 Routine Maintenance

Routine maintenance involves reviewing the administrative and monitoring duties of <IBM Cust>'s System Administrator with respect to maintenance of the IBM FileNet Email Manager system. These are tasks that should be performed on an appropriate schedule and will be specific to <IBM Cust>'s usage of the Email Manager system and its configuration. IBM recommends that the System Administrator develop a schedule of "housekeeping" procedures and tasks to be performed including log management, services monitoring, database backups, and configuration.

7.5.3 Review Backup Methodologies

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

7.5.4 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 ECM Consultant 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).

7.6 Task 6: 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.

7.7 Task 7: Project Completion

Upon completion of the Package, the ECM Consultants will deliver to <IBM Cust> a completed Install & Mentoring Checklist which constitutes completion of this project. Please refer to *Email Manager Install & Mentor Checklist*.

If issues arise after completion of the project, <IBM Cust>'s Project Team will attempt to resolve these problems independently or with the assistance of the IBM Product Support Center.