

***<IBM Customer>***

## **Section 1**

# **Business Analytics Software IBM Cognos BI v10 Quick Start Package Service Description**

***<Date>***



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## 1. Description of Services

IBM Business Analytics (BA) is pleased to submit this Service Description to <IBM Cust> also referred to as “customer” or “you” or “your”. <IBM Cust> has requested the following services from IBM:

⇒ IBM Cognos BI v10 Quick Start Package (Package)

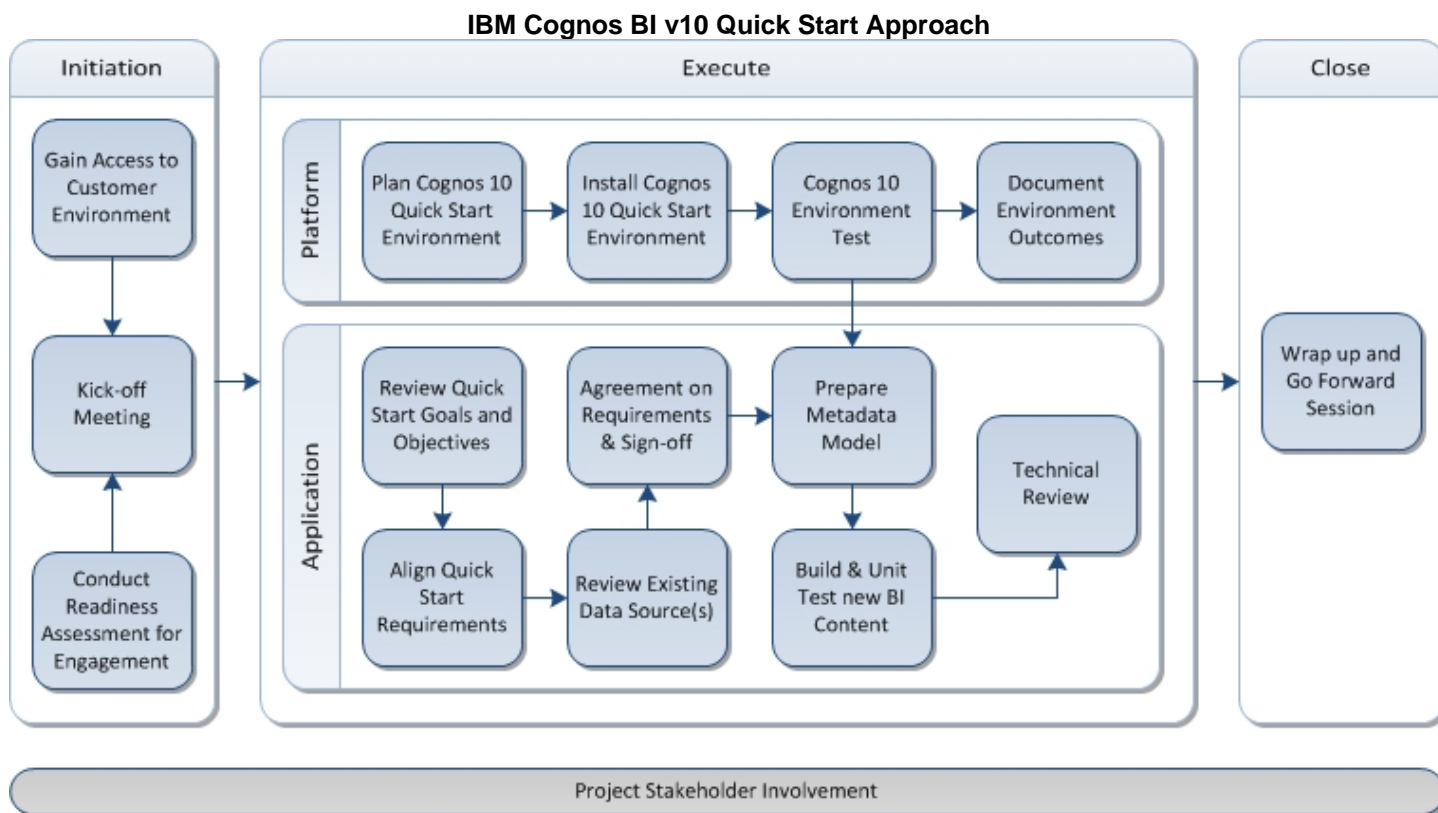
This Package provides experienced resources with the knowledge of IBM Cognos 10 capabilities to install and configure the IBM Cognos BI v10 product as a foundation for further exploration of IBM Cognos 10 capabilities, which will help you uncover new opportunities of how to leverage your Cognos investment throughout your organization.

- For this Package, IBM will provide a Field Delivery Consultant (FDC) and Technical Solutions Architect (TSA) who are experts at designing and creating IBM Cognos BI v10 solutions, in addition to other personnel as required.

The scope of this Package includes the following services:

- Installation and configuration of one (1) IBM Cognos BI v10 “Quick Start Development Environment” (Quick Start Environment)
- Design and development of one (1) IBM Cognos Framework Manager model
- Design and development of one (1) IBM Cognos Business Insight dashboard
- Design and development of one (1) IBM Cognos Active report with MHT output
- Design and development of one (1) IBM Cognos Business Insight Advanced report with an external data source

The following diagram depicts the work flow of IBM’s responsibilities for this Package:



The resources required for this project will include both IBM and <IBM Cust> personnel in order to successfully coordinate meetings, define requirements, and provide feedback. Throughout the process, collaboration is expected across both teams to ensure that the project needs are met in a timely manner.

At the completion of the Package, <IBM Cust> will have an installed and configured Quick Start Environment with ready to use IBM Cognos BI v10 Content deployed as a starting point for exploring new IBM Cognos 10 Features. The Quick Start Environment does not reflect comprehensive application requirements, represent an end state production configuration, or address sizing or performance. The intent is to help quickly begin <IBM Cust>'s IBM Cognos BI v10 initiatives.

Any change in the scope of work defined in this Service Description requested by <IBM Cust> may result in additional costs and must be documented in a Project Change Request (PCR).

## 2. Product Training

<IBM Cust> should have one or more individuals successfully complete the following IBM training prior to engagement. The material covered will give the customer's personnel exposure to the features and will provide a good foundation for them to build upon during the project delivery. The IBM education recommended for this engagement is as follows:

IBM recommends the following classes for experienced Business Analytics Technical resources: and the commensurate certifications and What's New training.

- Course Code: B5110 or J2110 – [IBM Cognos What's New \(V10.1\)](#)
- Cognos Certifications: [Business Analytics Certification](#)

IBM recommends the following foundation courses for new project members:.

- Course Code : B5152 or O5152 or J2152 - [IBM Cognos Framework Manager: Design Metadata Models \(V10.1\)](#)
- Course Code : B5155 - [IBM Cognos BI Administration \(V10.1\)](#)
- Course Code : B5158 or O5158 or J2158 - [IBM Cognos Report Studio: Author Professional Reports Fundamentals \(V10.1\)](#)
- Course Code : B5159 or O5158 or J2159 - [IBM Cognos Report Studio: Author Professional Reports Advanced \(V10.1\)](#)
- **OR** Course Code: B5160 or O5158 or J2158 - IBM Cognos Report Studio: Author Professional Reports (V10.1)
- Course Code : B5181 - [IBM Cognos Business Insight Advanced: Author Self-Service Reports \(V10.1\)](#)
- Course Code : B5192 - [IBM Cognos Report Studio: Author Active Reports \(V10.1\)](#)

IBM may offer an equivalent Instructor Led Online (ILO) or self paced Virtual Classroom (SPVC) course which will also satisfy the training recommendations for this Package.

The cost for these training courses is not included in this 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. <http://www-01.ibm.com/software/data/education/cognos.html>

For individual training recommendations, please reference the Business Analytics Training Paths. <http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=page&c=W113304M84371I29>

For training recommendations for your entire organization, please contact the IBM Business Analytics Education Team via the IBM Learning Web Site. <http://www-01.ibm.com/software/data/education/cognos.html>

In the interest of quality education, IBM reserves the right to update training courses at any time.

## 3. Resources

The Package Project Team will consist of resources from the IBM Business Analytics Team, the <IBM Cust> business and technical staff and, when applicable, an IBM Business Partner. Examples of Project Team members are listed below.

### 3.1 IBM Business Analytics Team Resources

The IBM BA Solution Implementation Manager coordinates the appropriate BA resources as required and will have overall responsibility for the IBM BA resources and deliverables. The IBM BA Project Team typically includes the following members, where where multiple roles may be filled by one person:

- Solution Implementation Manager (SIM) – Project Lead
- Brand Solution Representative (BSR)
- Business Analytics Solution Specialist (BAS)
- Business Analytics Education Seller (BAES)
- Technical Solution Architect (TSA)
- Field Delivery Consultant (FDC)

### 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 an internal Project Lead to share lead responsibilities with the SIM.

Depending upon the project the <IBM Cust> Project Team may include any of the following roles or groups. In some cases, one person might fill several of the listed roles. (Note: Given the short timeline and rapid nature of this offering the below resources may be required to participate in a full time capacity. It is the responsibility of <IBM Cust> to ensure appropriate resource availability for all work streams.)

- Project Lead
- Technical Lead
- Subject Matter Expert
- Cognos System Administrator
- Web Master/Web Administrator
- Systems Engineer (Unix, Wintel, Linux)
- Network Administrator
- Corporate Security Administrator
- Application Server / Middleware Team
- Desktop Administrator
- Database Administrator
- Source Data Modeler

## 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 or specialized roles may be required at various phases of the service execution. Likewise, not all of the individuals may necessarily be involved in this Package.

Project Lead - This individual will represent customer resources and provide project coordination in conjunction with the SIM.

Technical Lead – This individual acts as an interface between the technical developers and the business users. The Technical Lead often works with the subject matter expert in translating requirements into technical terms. Whereas the subject matter expert often writes the functional business requirements, the technical lead often writes the technical requirements.

Subject Matter Expert - This individual will represent <IBM Cust> in defining business requirements, work with the FDC in designing BI Content, participate in meetings to provide business knowledge about data, processes and requirements, and approve BI Content Design.

Cognos System Administrator – This individual will be the system administrator of the new Quick Start Environment once the Package has been delivered and the customer assumes responsibility for managing the Quick Start Environment.r.

Web Master / Administrator– This individual will be responsible for providing guidance on <IBM Cust> web server and web/portal standards. In addition, this resource will validate design considerations and assumptions made by the project team on how the various IBM Cognos components will integrate into the existing web server infrastructure.

Systems Engineer (Unix, Wintel, Linux) – This individual will be responsible for working with the IBM team in identifying all system software requirements as well as assuring that the IBM Cognos BI v10 Quick Start architecture conforms to internal <IBM Cust> OS standards and protocols.

Network Administrator – This individual will assume responsibility for <IBM Cust>'s network infrastructure.

Corporate Security Administrator – This individual will be responsible for working with the IBM team to identify all security requirements. All integration points between the IBM Cognos BI v10 application software and <IBM Cust>'s enterprise security infrastructure will be owned by this individual.

Application Server / Middleware Team – This team often provides technical knowledge and completes some of the installation prerequisites. Access to this team can be very important during the product installation tasks.

Desktop Administrator – This individual will work with the IBM team to identify and validate all end-user workstation components. In the case of areas where the IBM Cognos BI v10 Quick Start architecture is dependant upon specific versions of workstation software, such as MS Office, this individual will validate the standard requirements and ensure version conformance between customer corporate guidelines and the IBM Cognos version requirements.

Database Administrator - This individual will work with the IBM team to create and/or establish connectivity to the Cognos Content Store, Cognos Audit Store and corporate source data, create user ids, set passwords, grant access and privileges to the required databases.

Source Data Modeler - This individual will work with the IBM team and <IBM Cust>'s Subject Matter Expert in identifying the source data to meet the business requirements, provide data models and resolve any data related issues.

## 5. Responsibilities

### 5.1 <IBM Cust> Responsibilities

<IBM Cust> will make available all <IBM Cust> personnel required for this project in a timely manner. Any significant delays caused by the <IBM Cust> personnel not being available or by project prerequisites not being met may result in schedule delays which can impact the project sufficiently to require a PCR to address additional or extended IBM personnel requirements and additional costs.

In order to facilitate a successful delivery, <IBM Cust> must provide the following:

#### a. Project Prerequisites

All prerequisites must be met before IBM can begin the execution of this Package.

1. Complete and return the following prerequisite questionnaires to IBM two (2) weeks prior to the engagement initiation:
  - i) Cognos BI v10 Installation Readiness Assessment
  - ii) Cognos BI v10 Quick Start Readiness Assessment
  - iii) Cognos BI v10 Content Requirements Document – Section A

- (1) Ensure business use case(s) are documented are documented in the Cognos BI v10 Content Requirements Document – Section A.
2. Provide documentation for all data models for the source data.
3. Ensure all necessary hardware has been procured and is ready for IBM Cognos BI v10 Software installation.
4. Ensure necessary third party software (database clients, drivers, etc.) have been installed on the Cognos BI v10 servers.
5. Download IBM Cognos BI v10 and supporting components and/or patches.
6. Provide IBM resources with access to the customer network at the beginning of engagement.
7. Provide, to IBM, the IDs, passwords, and permissions defined for the existing data sources that will be used.
8. Have an external data file for the External Data feature created and available.
9. If necessary, ensure the share drive for external data is created and accessible.
10. Obtain documentation for corporate standards, such as corporate colors and fonts.
11. Ensure screen shots or templates of existing Cognos report layouts are made available.
12. Provide any logos added to the content.
13. Identify a a Project Lead with sufficient authority to:
  - i) Represent<IBM Cust>'s interests.
  - ii) Serve as the focal point for all decisions and communications.
  - iii) Coordinate activities assigned to <IBM Cust> resources.
  - iv) Sign project-related documents.
- b. <IBM Cust> acknowledges that:
  1. Customer has some exposure to new features of IBM Cognos v10.
  2. Data sources are clean, correct and structured appropriately for reporting and analysis.
  3. Customer resources are readily available to engage and participate in engagement activities.
  4. Data sources are actively supported by IBM Cognos v10.
  5. IBM Cognos BI v10 Content delivered will be in accordance with the Cognos BI v10 Content Requirements Document.
  6. One (1) unit test case per constructed object will be defined, documented and reconciled by the customer. A Cognos BI v10 Unit Test Case Template will be provided by IBM.
- c. IBM may be required to engage offsite and / or remote resources to complete the tasks.
- d. All required IBM software subscriptions and agreements are in place and active.
- e. Provide adequate facilities for the IBM resources; including cubicles, desks, telephone, hardware and Internet access service, as required.
- f. <IBM Cust> will make available all required resources for this project in a timely manner. Any significant delays caused by <IBM Cust> resources not being available or project prerequisites not being met may result in schedule delays.

## 5.2 IBM Responsibilities

IBM's responsibilities are limited by the Package scope, which includes establishing a Quick Start Environment, and developing IBM Cognos BI v10 content in that environment with <IBM Cust>'s data as defined in the Cognos BI v10 Content Requirements Document.

In order to complete this Package, IBM is responsible for completing the following activities:

IBM will provide resources to:

- a. Conduct a Readiness Assessment
  1. Perform a Readiness Assessment to include completion of the following to ensure engagement readiness:
    - i) Cognos BI v10 Installation Readiness Assessment

- ii) Cognos BI v10 Quick Start Readiness Assessment
  - iii) Cognos BI v10 Content Requirements Document – Section A
- b. Conduct a Kick Off Meeting
- c. Establish the Quick Start Environment
  - 1. Plan, Install, Configure, Tune and Function Test **one** (1) Quick Start Environment
  - 2. Deliver the completed **Cognos BI v10 Installation Document**
- d. Review and refine Cognos BI v10 Quick Start application requirements:
  - 1. Review the Package goals and objectives
  - 2. Analyze the Package requirements
  - 3. Review the existing data sources
  - 4. Review the Cognos BI v10 Content Requirements Document
  - 5. Gain agreement with sign-off on the Cognos BI v10 Content Requirements Document
  - 6. Provide customer with the Cognos BI v10 Unit Test Case Template to complete
- e. Design and prepare the IBM Cognos Framework Manager or IBM Cognos Transformer metadata model
- f. Design and Build the IBM Cognos BI Content and Unit Test
  - 1. Perform one (1) unit test per new features content item created
- g. Perform a final Technical Review
- h. Conduct a Project Delivery Closure Meeting and provide a Cognos BI v10 Quick Start Closure Document and Education Recommendations Document
- i. Project Completion

## 6. Limitations

### 6.1 Service Limitations

The Package does not: (1) include logical/physical architecture, (2) represent a production or test environment end state configuration, (3) address sizing or capacity planning, troubleshooting or testing of performance, or repairs to existing IBM Cognos infrastructures. Any IBM involvement for such activities will be charged on a Time-and-Materials (T&M) basis under a separate Statement of Work. The Package is subject to the following limitations:

- a. The scope of this Package is limited to the following application development activities:
  - 1. Design and development of one (1) IBM Cognos Framework Manager model with one (1) fact, three (3) measures, and nine (9) dimensions.
  - 2. Design and development of one (1) IBM Cognos Business Insight dashboard with three (3) widgets and two (2) prompts.
  - 3. Design and development of one (1) IBM Cognos Active Report MHT output with three (3) data containers and 3 controls.
  - 4. Design and development of one (1) IBM Cognos Business Insight Advanced Report with an External Data Source (supported formats only).
- b. An IBM Cognos Transformer model created in lieu of an IBM Cognos Framework Manager (FM) model is limited to five (5) dimensions, three (3) levels deep, five (5) measures, no security, and a single fact data source.
- c. Development efforts are limited to supported product capabilities and functionality.
- d. Data sources are limited to the existing customer data sources only.
- e. Transactional application data sources, such as an ERP source application, are excluded.
- f. Content testing is limited to one (1) unit test only where the unit test case is provided, documented, and reconciled by the customer.
- g. Servicing up to two (2) servers with a single instance of the following as applicable: IBM Cognos BI Server, IBM Cognos PowerPlay Studio, IBM Cognos Transformer.
- h. Servicing up to two (2) Workstations with a single instance of the IBM Cognos Framework Manager, if applicable.



- i. The installed servers must have a minimum of 2GB of RAM per processor core, and a minimum of 10GB of available disk to support IBM Cognos Temp. These recommendations are in addition to any operating system vendor recommended minimums needed to support the selected operating system.
- j. IBM Cognos 10 Supported Operating Systems excluding Z-OS and Z-Linux.
- k. Any changes to the Service Limitations described herein will result in additional costs and must be documented in a PCR.
- l. Additional Package exclusions are defined in Appendix A of this document.

Unless otherwise discussed, IBM resources will be provided Monday through Friday from 8:00 a.m. to 5:00 p.m. local time, excluding holidays and vacation time. Specific details regarding schedules will be mutually agreed upon prior to the project start-date.

## 6.2 Travel & Living Expenses

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

While the travel dates and times of the IBM BA Team are negotiable, it is recommended that the FDC be onsite for at least the kick off meeting and the first week of delivery to establish effective communication between the teams. It is intended that status meetings and collaborative work sessions will be held via conference calls and web sessions, as needed, so that any off site resources can participate.

IBM will invoice <IBM Cust> for travel and living expenses and other reasonable expenses incurred in connection with the Service 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.

## 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: Cognos Readiness Assessment for Engagement

The purpose of the Cognos BI v10 Installation Readiness Assessment, Cognos BI v10 Quick Start Readiness Assessment, and the Cognos BI v10 Content Requirements Document is to ensure that <IBM Cust> has completed all of the prerequisites in a timely fashion for the successful start of the project.

### 7.2 Task 2: Kickoff Meeting

The purpose of this meeting is to prepare both the <IBM Cust> team and the IBM team for the IBM Cognos BI v10 Quick Start Project. Topics of discussion will include review of the scope, prerequisites, schedule, roles and responsibilities, project documentation to be used for various tasks. IBM will assist <IBM Cust> in completing the project contact list, work plan & meeting schedule, roles and responsibilities and engagement documents where applicable.

The agenda includes:

- Introductions
- Review Roles and Responsibilities
- Logistics (Building Access, Computers & Network Access, etc.)
- Review Objectives and Priorities
- Key Assumptions and Constraints
- Review of Service Description
- Review Engagement Deliverables
- Establish Meeting Schedules and Define/Review the IBM Cognos BI v10 Quick Start Package Project Plan

- Establish Project Status Reporting Schedule and Distribution List
- Review the Project Status Report
- Q&A

## 7.2.1 Review of the Service Description

The SIM will review the Service Description, the tasks, and the roles and responsibilities with <IBM Cust>'s Project Team.

## 7.2.2 Review the Engagement Deliverables

This Package contains the core set of documents and deliverables used during the course of the project. The IBM and <IBM Cust> team will work together to complete these documents as necessary throughout this project. It contains the following documents:

### Project Initiation Documents

- a. **Cognos BI v10 Quick Start Readiness Assessment** – This document will be used to confirm the project prerequisites are completed by the customer to mitigate risks prior to starting the engagement. The customer is required to complete this document prior to scheduling resources and confirming a start date for the engagement. A failure to complete the items contained in this document will likely result in a false start to the project and may incur additional costs and/or delays.
- b. **Cognos BI v10 Content Requirements Document** - This document includes documentation of the customer's specific business use cases, business rules and technical requirements to facilitate the rapid design and development. This document will include the business functional requirements necessary to design the solution as well as the technical requirements necessary to build the solution.

### Project Delivery Documents

- a. **Cognos BI v10 Quick Start Package Project Plan** – This plan represents the necessary milestones and tasks for completing this Package. At the beginning of the project, the team will customize the plan to align with the customer's specific objectives. Strict adherence to this plan is intended to ensure success of the project within the time frame of this Package.
- b. **Cognos BI v10 Unit Test Case Template**– This document will be provided to the customer to complete. Once completed, this document will be used as the criteria by which the FDC and the customer deem that the development efforts meet the business requirements previously agreed upon. This document will include such items as prompt values to select and the outcome values that one would expect to see.
- c. **Project Status Report** – This report will be completed by the FDC and used to communicate the status of the delivery with the customer. The status report will contain information such as the project status, open issues, open change requests, and any risks associated with the project delivery.

### Project Closure Documents

- a. ***Cognos BI v10 Installation Document*** – This document contains the final installation information. The customer can refer to this document to view the configuration of their specific installation.
- b. ***Cognos BI v10 Quick Start Closure Document*** – This document will be completed by the IBM Project team to review the value that was created through the development of this Package. It will highlight the features that were selected, the activities that occurred, and the completed outcomes. In addition, this document will contain customer specific go forward recommendations to ensure ongoing success.
- c. ***Education Recommendations Document*** – This document includes a reference of available education options and programs as well as a tailored training recommendation specific to your solution.

- d. Completion Checklist - Upon delivery of the Package deliverable(s) the customer will be provided a Completion Checklist. This **Cognos BI v10 Quick Start Package Completion Checklist** confirms that all IBM Business Analytics responsibilities have been completed.

### 7.2.3 Review and Refine the Cognos BI v10 Quick Start Package Project Plan

The IBM Project Team and <IBM Cust> team will work to customize the sample IBM Cognos BI v10 Quick Start Package Project Plan that best fits <IBM Cust>'s schedule and regional meeting needs. The plan is designed to successfully complete the Package 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 sharing for the team members.

### 7.2.4 Review the Cognos BI v10 Quick Start Environment Installation Readiness

IBM will review the customer-completed Cognos BI v10 Installation Readiness Assessment to ensure that <IBM Cust> is prepared to move forward with the environment installation tasks.

The Cognos BI v10 Installation Readiness Assessment is essentially a hardware and software environment enablement document. It helps to ensure that known roadblocks are removed prior to the start of the installation engagement. A failure to complete the steps contained in this document will likely cause a false start to the project and may result in additional costs and / or delays.

### 7.2.5 Review Cognos BI v10 Content Requirements

The objective of this task is to ensure that <IBM Cust> understands the content to be developed in detail and prepared to move forward with the application development tasks.

## 7.3 Task 3: Establish the Quick Start Environment and Tests

The TSA will install, configure, tune and test:

- a. Up to two (2) servers with a single instance of the following as applicable: IBM Cognos BI Server, IBM Cognos PowerPlay Studio, IBM Cognos Transformer
- b. Up to two (2) Workstations with a single instance of the IBM Cognos Framework Manager.

### 7.3.1 Plan Quick Start Environment

This planning task is an opportunity for collaboration between the TSA and <IBM Cust>'s technical resources in order to review prerequisites and plan the actual IBM Cognos BI v10 product installations.

The TSA and <IBM Cust>'s technical resources will complete the Cognos BI v10 Installation / Architecture Questionnaire. This questionnaire is designed to enable the installation decision process for hardware topography and to collect information regarding the necessary integration points between IBM Cognos BI components and the supporting architecture. Discussion topics may include hardware configuration, Content Store locations and Security connections.

### 7.3.2 Install Quick Start Environment

Installation of the Quick Start Environment consists of:

- a. Conformance Check - The conformance check is designed to help verify that the IBM Cognos BI products are installed into a hardware / software environment that conforms to supportability standards.
- b. System Health and Readiness Check - Reaffirms that the hardware and software environment is ready for installation.

- c. **Installation** – Up to a maximum of two (2) servers and one (1) instance of Applicable IBM Cognos 10 Software Components (IBM Cognos BI Server, IBM Cognos PowerPlayTransformer, IBM Cognos Framework Manager). Installation is performed and data is collected for completion of the installation documentation.

### 7.3.3 Configure Quick Start Environment

Configuration of the Quick Start Environment consists of the following tasks:

- a. **Configure IBM Cognos 10 BI Server** – Configuration of the IBM Cognos BI products for proper function and interoperability through the Cognos Configuration user interfaced.
- b. **Configure Audit Store Connection** (*Optional*) – Configuration and testing of the connection to the Audit Store Database if applicable.
- c. **Import Audit Reports** (*Optional*) – Import of the BI Audit report package.
- d. **Configure Security Connection** – Configure basic authentication connection for the IBM Cognos BI environment.
- e. **Configure Notifications (SMTP Connection)** (*Optional*) – Set the SMPT Mail server connection for notification services.
- f. **Configure IBM Cognos PowerPlay Transformer** (*If Applicable*) – Configure the IBM Cognos PowerPlay Transformer if applicable. Applicability depends on use and installation location.
- g. **Perform Custom Tuning** – Tune the IBM Cognos BI Server environment to proven practice standards as appropriate for hardware and usage.

### 7.3.4 Execute Environment Tests in the Quick Start Environment

Environment tests are performed to ensure that the installation has been completed and that components function and interoperate as expected.

Function tests include:

- a. Test IBM Cognos Connection Studios
- b. Configure and Test <IBM Cust>'s Data Source Connectivity
- c. Test General Administration Functions
- d. Test IBM Cognos Framework Manager Connection

### 7.3.5 Document the Installation and Configuration of the Quick Start Environment

IBM will complete, review and deliver **Cognos BI v10 Installation Document** with <IBM Cust>'s Project Lead. Delivery of this installation document finalizes the IBM Cognos BI v10 Quick Start Installation.

## 7.4 Task 4: Prepare Application Work Stream

We will review the Cognos BI v10 Content Requirements for this Package. The SIM or FDC will work with <IBM Cust> to review, refine, and finalize the agreed upon Cognos BI v10 Content.

### 7.4.1 Analyze Quick Start Requirements

The project team will analyze the business use cases and requirements as defined in the Cognos BI v10 Content Requirements Document in order to properly design the new features content to be delivered to <IBM Cust>.

- a. Conduct collaborative sessions to review the business use cases and requirements.
- b. Refine the requirements to ensure successful delivery of this Package.

### 7.4.2 Review Existing Data Sources

The FDC will review the existing data source with <IBM Cust>'s Source Data Modeler to ensure availability of structural and fact data to meet the business requirements.

- a. Review any data source topologies or diagrams that the customer can provide.
- b. Conduct collaborative sessions to understand the existing data structure.
- c. Resolve any gaps that exist and ensure that all data necessary is available.

### 7.4.3 Complete Requirements Gathering

The FDC may interview and gather information from the identified business and technical experts to ensure requirements in the Cognos BI v10 Content Requirements Document are understood.

### 7.4.4 Gain Agreement on Requirements and Sign-Off

Together, the IBM and <IBM Cust> project team will formalize their agreement of the IBM Cognos BI v10 Quick Start requirements. These requirements will be documented with signatures from both parties. Once this step is completed, the development efforts will commence. The tasks are:

- a. Finalize the agreed upon requirements and revise the Cognos BI v10 Content Requirements Document as needed.
- b. Gain sign-off and deliver the Cognos BI v10 Content Requirements Document to all parties.
- c. Customer completes the Cognos BI v10 Unit Test Case Template and provides this to the FDC.

## 7.5 Task 5: Execute

### 7.5.1 Design and Prepare Metadata

The FDC will design and build the IBM Cognos Framework Manager model and / or IBM Cognos Transformer cube and publish the necessary packages to begin building the BI Content. This is often an iterative process where necessary changes to the metadata modeling are realized during the content creation task.

This task will require collaboration between the FDC and the <IBM Cust> Source Data Modeler. The <IBM Cust> Source Data Modeler must be readily available to assist and answer questions. Activities include:

- a. Design the metadata (using IBM Cognos Framework Manager and / or IBM Cognos Transformer).
- b. Test modeled data to ensure documented business rules are properly respected.
- c. Build and publish the metadata and / or cube.

### 7.5.2 Design and Build BI Content and Unit Test

During this task, the FDC will design and build the required content in the new Quick Start Environment. This will be a rapid and iterative process that will require quick turnaround from <IBM Cust>'s resources to answer questions and unit test the content. Full time cooperation and resource availability is critical to meeting the project deadlines for this task.

Unit testing will also occur against the specific content that is built for <IBM Cust>. Prior to this task, <IBM Cust> will have provided one (1) documented unit test case per chosen content to the FDC. The purpose of the unit test is to quickly determine if the content created meets the technical and business requirements as previously agreed.

<IBM Cust> will be responsible for promptly performing the unit test and quickly providing feedback to the FDC.

### 7.5.3 Technical Review

After the IBM Cognos BI v10 Content is built and deployed, a final technical review will be completed by the project team. This is where the <IBM Cust> Project Lead and the FDC review the content that was created to ensure compliance with the agreed upon requirements.

## 7.6 Task 6: Project Closure

### 7.6.1 Complete Project Closure Documentation

The **Cognos BI v10 Quick Start Closure Document** will be prepared jointly by the IBM BA Team and <IBM Cust>'s Project Lead. This document provides for a formal understanding of what has been accomplished and outlines next steps in realizing the potential of IBM Cognos 10. It is not a legally binding document or contract.

### 7.6.2 Complete Education Recommendations Document

The **Education Recommendations Document** will be prepared by the BAES Team and reviewed with <IBM Cust>. This document serves as a reference of available education options and programs, including a tailored training recommendation specific to your education needs.

### 7.6.3 Conduct Project Closure Meeting

This meeting will conclude the engagement and deliverables for this project. The SIM or FDC and BAES will review the **Cognos BI v10 Quick Start Closure Document** and **Education Recommendations Document** with <IBM Cust> to provide for a formal understanding of what has been accomplished, observations, findings, recommendations and the 'Go-Forward Plan' to serve as a reference to realize the potential of IBM Cognos 10.

### 7.6.4 Project Completion

The Package will be considered complete when IBM delivers the **Cognos BI v10 Quick Start Closure Document** and the **IBM Cognos BI v10 Quick Start Package Completion Checklist** to the <IBM Cust>'s Project /Engagement Sponsor or delegate for review.

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.

## Appendix A: Quick Start Service Exclusions

The following table contains exclusions of this Package which may be purchased with a PCR or separate Statement of Work.

Category	Item
BI content using these as Data Sources	<ul style="list-style-type: none"> <li>• IBM Cognos Enterprise Planning</li> <li>• IBM Cognos Finance</li> <li>• IBM Cognos Controller</li> <li>• IBM Cognos TM1</li> <li>• IBM DB2 Cubing Services</li> <li>• SAP/BW</li> </ul>
Installing or configuring any of these IBM Cognos Products or features	<ul style="list-style-type: none"> <li>• IBM Cognos Business Viewpoint</li> <li>• IBM Content Analytics</li> <li>• IBM Cognos Metric Studio</li> <li>• IBM Cognos Metric Designer</li> <li>• IBM Cognos Mashup Service</li> <li>• IBM Cognos Data Manager</li> <li>• IBM Cognos SDK</li> <li>• IBM Cognos Statistics</li> <li>• IBM Cognos Real-time Monitoring</li> <li>• IBM Cognos Mobile</li> <li>• IBM Cognos Collaboration</li> <li>• IBM Cognos TM1</li> <li>• IBM Cognos Enterprise Planning</li> <li>• IBM Cognos Controller</li> <li>• IBM Cognos Analytic Applications</li> <li>• IBM SPSS</li> </ul>
Quick Start Environment Configuration for these products or features	<ul style="list-style-type: none"> <li>• Oracle/Essbase</li> <li>• Sybase</li> <li>• SAP/BW</li> <li>• Oracle Weblogic Application server</li> <li>• SAP NetWeaver</li> <li>• Use of Custom Security Providers / Trusted Security Providers</li> <li>• Single Sign On / CA Siteminder / Strong Encryption Providers</li> <li>• Portal Customizations</li> <li>• Project Repositories</li> <li>• 3rd Party Metadata sources for Framework Manager</li> <li>• Lineage or Glossary Providers</li> <li>• Custom fonts</li> <li>• Embedded Image File Locations</li> </ul>
General Exclusions	<ul style="list-style-type: none"> <li>• Architecture Planning and Design Services</li> <li>• Use of Java Scripting / HTML Coding</li> <li>• Use of Hard Coded External References</li> <li>• Use of XML Report Customer Templates</li> <li>• Use of Custom SQL within Framework Manager model or reports</li> <li>• IBM Cognos PowerPlay Transformer Models Security</li> <li>• IBM Cognos 10 Dimensionally Modeled Relational (DMR)</li> <li>• Business Rules and Calculations outside of the agreed upon scope</li> <li>• Any Data Cleansing or Extraction-Transformation-Load (ETL) of data</li> <li>• Performance, Load or Scale Testing</li> <li>• Creating or modification of any Scripts</li> <li>• Skinning of Cognos Connection, Cognos Viewer, or Studios</li> <li>• Installations on zLinux or zOS</li> <li>• Installations of IBM Smart Analytics System (ISAS)</li> </ul>