



IBM Customer ***IBM CommonStore for
Exchange Install Package
Service Description***

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1. Description of Services

IBM Enterprise Content Management (“IBM ECM”) is pleased to submit this Service Description to IBM Customer (“<IBM Cust>”). <IBM Cust> has requested the following services from IBM ECM:

- IBM CommonStore for Exchange (“CSX”) Install Package

This service provides the expert resources to install the CSX software at your 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 IBM ECM consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed at other successful IBM installations. The completed installation also verifies that the software is supportable by IBM's Support organization.

The scope of this Install Package is limited to the installation and support of CSX¹.

This CSX Install Service will provide:

- Review of <IBM Cust>'s platform/architecture environment
 - Provide/review CSX Pre-Installation Questionnaire
 - Review standard test plan
 - Review standard rollout plan (Optional)²
- Install one (1) CommonStore server:
 - Install II4C (CM only)
 - Configure one (1) backend Archive³
 - Configure one (1) archive process (archpro)
 - Configure one (1) archive process service (Windows only)
 - Install one (1) CSX System Manager
 - Install one (1) CSX Search Server⁴ (CM8 Archive only, Optional)
 - Discuss search support : full-text vs. attribute
 - Discuss search tools : CSX Search Server vs. eMail Search (eMS)
- Extend Active Directory schema and install CSX Forms/Public Folders
- Create up to two (2) CSX Tasks
 - Automated Crawling/Archival

¹ This service is limited to the installation or configuration of (1.) CSX on one server, (2.) CSX Search Server, (3.) CSX Task, (4.) CSX System Manager, (5.) Outlook Web Access Support (Optional), and (6.) Client Components on two (2) workstations (Optional). Installation and configuration of any additional services other than those required as part of the installation of the CSX are considered additional options. Contact your Lab Services Sales Manager (LS SM) for pricing on any additional install services.

² The effort to create a custom rollout solution or assistance with a custom rollout is not included in this Package service. Contact your LSSM to outline the services necessary for this additional effort.

³ Select one of the following for the backend Archive: IBM Content Manager, IBM Content Manager OnDemand, or IBM Tivoli Storage Manager. Configuration for more than one Archive is considered out of scope for this service. Installation of an Archive solution is not within the scope of this Package service. Contact your Lab Services Sales Manager for options.

⁴ The CSX Search Server is a component of CSX. CSX Search Server is a different solution from eMail Search (eMS). Installation of eMS is not within the scope of this Install Package.

- Interactive Archival
- Install one (1) instance of CSX Outlook Web Access components (Optional)
 - Discuss CSX OWA Exchange Server authentication support : Basic/NTLM vs. FBA
- Install CSX Client components for two (2) Windows workstations (Optional)
 - Discuss end-user functionality (Interactive Archival, Searching/Retrieval)
- Execute the standard test plan
- Demonstrate the System to the Project Team
- Project management and coordination to facilitate a successful and professional project delivery

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 CSX 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 CSX software.

At the completion of the 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 IBM 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 Package⁵.

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 Change Order.

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. IBM education required for this installation is as follows:

- Course Code: IM830 - CommonStore v8.3 for Exchange Server

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 IBM Sales Team can assist <IBM Cust> in obtaining a recommended training plan specific to <IBM Cust>'s requirements.

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

⁵ Services to configure all site and user specific preferences are considered out of scope for this Install Package. Contact your Lab Services Sales Manager (LS SM) for pricing on this effort.

3. Resources

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

3.1 IBM ECM Team Resources

The IBM Project Lead coordinates the appropriate IBM resources as required.

The IBM Team typically includes the following members:

- IBM ECM Implementation Project Manager (“IPM”) – Project Lead
- Lab Services IT Specialist (“IBM ECM Consultant”)
- Technical Consultant (“TC”)
- IBM ECM Sales Specialist
- IBM ECM Sales IT Specialist (“ECM 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 IBM Project Lead.

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

- Project Lead
- IBM CSX System Administrator
- Active Directory Administrator
- Exchange 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.

Technical Project Installation Resource (1 to 2 people) - This individual will work closely with the IBM ECM Consultants during installation and configuration of the CSX components. The resources will provide technical insight into the current <IBM Cust> information systems, as required, for the installation phase. IBM strongly recommends that this individual become familiar with the IBM products by enrolling in IBM training prior to project initiation.

IBM CSX System Administrator or Web Master/Web Designer (1 to 3 people) - This individual will learn the administration functions necessary to oversee CSX and will serve as the on-going administrator. Attending the designated training for this package is required and must be completed prior to the installation of the software. This individual will work closely with the IBM ECM Consultants during installation and configuration of the IBM CSX software.

Active Directory Administrator (1 to 2 people) – This individual will work closely with the IBM ECM Consultants during the execution of the Active Directory scripts for CSX. These resources will provide technical insight into the current <IBM Cust> Active Directory environment, as required, for the installation phase.

Exchange Administrator (1 to 2 people) – This individual will work closely with the IBM ECM Consultants during the configuration of Exchange for CSX. These resources will provide technical insight into the current <IBM Cust> Exchange system, as required, for the installation phase.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate a successful installation, <IBM Cust> has the responsibility to provide the following:

- a.) Project Prerequisites
 - All prerequisites must be met before IBM ECM can begin the configuration of the product.
 - Hardware, software, and network configurations that meet IBM requirements for system size and performance for the purchased software. This includes:
 - Installation of the operating systems
 - Installation of the Microsoft Outlook Client.
 - Creation of a CSX Windows ID that has administrator rights to the CSX server and editor access to the Outlook mailboxes & Exchange folders it will work against.
 - If Forms Based Authentication (FBA) is being used on the frontend Exchange server, then <IBM Cust> is responsible for deploying a second Non-FBA frontend Exchange server to support CSX OWA.
 - Installation/application of appropriate levels of patches to meet IBM's minimum requirements
- 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.) Installation of one Archive System (Tivoli Storage Manager, IBM Content Manager 8, or IBM Content Manager OnDemand (CMOD)) and validation that the system is operating as expected.⁶
- d.) Installation of most recent version of the Microsoft Exchange Server within an Active Directory Environment (see Installation Manual for supported versions) and validation that the system is operating as expected.
- e.) Exchange or Active Directory Administrator is responsible to execute the following scripts. An appendix document included within the CSX Install Package Module will explain the detail of these scripts.
 - CsxImportSchema.vbs

⁶ Installation of Tivoli Storage Manager, IBM Content Manager 8, or IBM Content Manager OnDemand is not included in this Service and is considered an additional option. Please contact your Lab Services Account Manager for details.

- CsxImportEmptyDirectory.vbs
 - CSXActiveDirectoryExtensionVerification.vbs
- f.) Analysis/requirements gathering of business application rules, business application processes, and application security access as they pertain to the implementation of CSX. The outcome of this process is a System Configuration Document.
- g.) Local system administrator(s) trained on the administration of IBM products already installed (Tivoli Storage Manager, IBM Content Manager 8, or IBM Content Manager OnDemand) as well as to be installed at <IBM Cust> (CommonStore).
- h.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the IBM ECM Consultant during the installation, he or she will be responsible for completing the following items.
- Creating additional Policies or Content Manager Attributes
- i.) Product Support Agreement in place through IBM ECM to provide for on-going maintenance post-installation.
- j.) Adequate facilities for the IBM ECM resources; including cubicles, desks, and telephone, hardware and Internet access service.
- k.) <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 Project Change Request ("PCR") addressing additional or extended IBM personnel requirements and additional costs. Specifically, AD & Exchange Resources.

5.2 IBM ECM Responsibilities

- Review <IBM Cust>'s CSX Architecture
 - Provide/Review CSX Pre-Installation Questionnaire
 - Review standard test plan⁷
 - Review standard rollout plan (Optional)⁸
- Install one (1) CSX server
 - Install I14C (CM only)
 - Configure one (1) archive process (archpro)
 - Configure one (1) of backend archive from the following list :
 - IBM Content Manager
 - IBM Content Manager OnDemand
 - IBM Tivoli Storage Manager
 - Configure one (1) archive process service (Windows only)
 - Install one (1) CSX System Manager
 - Install one (1) CSX Search Server (CM8 Archive only, Optional)
 - Discuss search support : full-text vs. attribute

⁷ The effort to define and create a custom test plan is out of scope for this Package service. Please contact your LSSM to help scope this additional service if a custom test plan is desired.

⁸ The effort to define and create a custom rollout plan is out of scope for this Package service. Please contact your LSSM to help scope this additional service if a custom rollout plan is desired.

- Discuss search tools : CSX Search Server vs. eMail Search (eMS)
- Extend Active Directory schema and install CSX Forms/Public Folders
- Create up to two (2) CSX Tasks
 - Automated Crawling/Archival
 - Interactive Archival
- Install one (1) instance of CSX Outlook Web Access components (Optional)
 - Discuss CSX OWA Exchange Server authentication support : Basic/NTLM vs. FBA
- Install CSX Client components for two (2) Windows workstations (Optional)
 - Discuss end-user functionality (Interactive Archival, Searching/Retrieval)
- Execute the standard test plan
- Demonstrate Product to the Project Team
- Perform System Administration Handoff
 - Knowledge Transfer
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- Provide <IBM Cust> a completed CSX Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) <IBM Cust> should have attended the training required in this CSX package prior to the installation of any IBM ECM software.
- b.) <IBM Cust> will perform a Network check (verify server connectivity to network, addressing, correct protocol).
- c.) All prerequisite hardware and software has been installed onto <IBM Cust>'s designated IBM servers.
- d.) Latest version of the IBM CommonStore for Exchange has been downloaded to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
- e.) <IBM Cust> must have the selected Archive System (Tivoli Storage Manager, IBM Content Manager 8, or IBM Content Manager OnDemand) installed, tested and working as expected prior to the installation of the CSX software.
- f.) <IBM Cust> will deploy a second Non-Forms Based Authentication frontend Exchange server to support CSX OWA, if Forms Based Authentication (FBA) is being used on the frontend Exchange server
- g.) Installation of <IBM Cust>'s CSX software will not be in a clustered environment. A chargeable Change Order will be required to perform the installation in a clustered environment.
- h.) Additional resources and time for the development of "custom applications" are not included in this Install.

6.2 Service Limitations

The CSX Installation 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.

IBM 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 IBM 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 IBM ECM Consultant will travel to <IBM Cust>'s site for **one** 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 IBM team for the CSX Install Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The IBM 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 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 ECM strongly encourages the practice of joint task assignments as an excellent means of training and knowledge transfer for the team members.

Upon <IBM Cust>'s signed acceptance of the project service description, the starting date to begin the CSX Install Package for <IBM Cust> will be scheduled and confirmed by the IBM ECM and <IBM Cust> Project Leads.

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 Document & Review

The IBM PM & Consultant will review the IBM software purchased, <IBM Cust>'s server configuration (hardware, operating system and site specific software), IBM specific network configuration, and <IBM Cust>'s System Diagram. This review will encompass the items indicated in the CSX Pre-Installation Questionnaire.

IBM provides a standard test plan and standard rollout plan for Commonstore. The IBM Consultant will review both of these documents with <IBM Cust> CSX System Administrator.⁹

7.3 Task 3: Archive Storage Configuration

Before installing the CSX software, the IBM ECM Consultant along with <IBM Cust>'s CSX System Administrator will configure the connection to one of the following existing Repositories:

Content Manager 8

- Create a Content Manager archive user ID
- Create attributes
- Create item types

Content Manager OnDemand

- Create a CMOD user for CommonStore
- Create a CMOD application group
- Create a CMOD application
- Configure the connection to a remote OnDemand server

Tivoli Storage Manager

- Register a TSM Node for CommonStore
- Create a TSM management class
- Activate the STANDARD policy set

7.4 Task 4: Software Installation

The IBM ECM Consultant, with the assistance of <IBM Cust>'s CSX 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 a successful 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>.

⁹ The effort to define and create custom test and rollout plans is out of scope for this Install Package. Please contact your LSSM to help scope this additional service if a custom test or rollout plan is desired.

7.4.1 Install CSX Server

Along with <IBM Cust>'s CSX System Administrator, the IBM ECM Consultant installs the CSX Server software components.

This requires a CSX Windows ID that has administrator rights to the CSX server and editor access to the Outlook mailboxes & Exchange folders it will work against.

The CSX System Manager is a Microsoft Management Console (MMC) that provides a graphical user interface for the CSX System Administrator. Using the CSX System Manager, the IBM ECM Consultant and <IBM Cust>'s CSX System Administrator install and configure the instances of the CSX Task.

Installation of the CSX Search Server is available when using a Content Manager 8.x Archive only. The text-search function allows you to search for text (words, phrases, character strings) in the content of archived messages. This component will allow you to create a search index for email content. The key to the Search Server installation is understanding the need for full text searching versus attribute searching based upon your current and future content. The IBM Consultant will review your searching needs and install the CSX Search Server based upon the decisions <IBM Cust> makes during this process.

The IBM ECM Consultant will assist with the additional configuration required for Content Manager 8 if necessary.

7.4.2 Extend Active Directory Schema And Install CSX Forms/Public Folders

The IBM ECM Consultant will **assist** the <IBM Cust>'s CSX System Administrator in extending the <IBM Cust> Active Directory schema, which is required to enable storage of the CommonStore configuration data. As described in section 5.1(e) of this document, the IBM ECM Consultant will not perform actual script execution.

The IBM ECM Consultant will **assist** the <IBM Cust>'s CSX System Administrator to install/register the CSX form templates in the Exchange organizational forms library and create public folders. These steps are required for CSX Client Components to function properly. As with the schema extension scripts, the IBM ECM Consultant will not actually perform these installation steps.

7.4.3 Create CSX Tasks

The CSX Task is the interface between the Exchange server and the CommonStore server. It processes all archiving and retrieval jobs, including those that are triggered by automatic functions. The IBM ECM Consultant and <IBM Cust>'s CSX System Administrator will configure up to two (2) CSLD tasks.

If automated crawling/archival desired, the IBM ECM Consultant and <IBM Cust>'s CSX System Administrator will implement one (1) archival policy and an appropriate schedule (i.e. daily, weekly, monthly, etc) for the task crawler.

Creation of these tasks will reinforce formal training previously attended by the <IBM Cust>'s CSX System Administrator, ensuring that he or she will be able to expand/modify CSX task configuration to meet future needs.

7.4.4 Install CSX Outlook Web Access Components (Optional)

The CSX Outlook Web Access Script Extensions integrate CommonStore buttons into the Outlook Web Access interface. The IBM ECM Consultant and <IBM Cust>'s CSX System Administrator will review the authentication type being used on the Exchange Server, then install and enable the Outlook Web Access Script Extensions.

7.4.5 Install CSX Client Components (Optional)

The CSX Client Components installation adds buttons to the Outlook user interface which trigger Interactive Archival, Searching, and Retrieval. The actions make use of a CSX runtime API which is also added to the workstation during installation. The the CSX Client Components will be installed on up to two (2) workstations.

7.5 Task 5: Execute the Standard Test Plan

Once configured, testing will ensue to validate that the system is operational. The team will complete the standard test plan, as reviewed earlier, to validate product functionality. The Project Team members can use this phase as a learning process to ensure they understand the complete installation and testing process of the CSX system.

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. Such as:

- Archiving and stubbing of email with and without Attachments
- Retrieve email into the Exchange Server
- End-user functionality (Interactive Archival, Searching/Retrieval) (Optional)
- Viewing email using a Web Browser

7.7 Task 7: System Administration Handoff

7.7.1 Knowledge Transfer

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

- Configuration of archival process (archpro)
- Preparation of Active Directory and Exchange Server
- Configuration of CSX Task
- CSX performance tuning

7.7.2 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:

- Checking system services
- Monitoring system usage
- Backup configuration files

- Prune trace and log Files

7.7.3 Review Backup Methodologies

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

7.7.4 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 IBM ECM Consultant will review troubleshooting and problem reporting procedures and provide a trouble report template to <IBM Cust>. Over time the <IBM Cust> CSX 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).

7.8 Task 7: Project Completion

Upon demonstration of the product the IBM ECM consultant will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *CommonStore for Exchange 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.