



IBM Customer ***IBM Content Collector for
Email Service Description***

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1. Description of Services

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

- IBM Content Collector for Email (Content Collector for Email) Install Package¹

This service provides the expert resources to install Content Collector for Email software at your site integrating with IBM FileNet P8 Content Manager (P8 CM) or IBM Content Manager 8 (CM8). It also provides hands-on assistance to address questions and key issues regarding the installation and configuration of the software.

The Delivery Consultant will help guide <IBM Cust> on strategies and procedures that have been employed by other ECM installations. The completed installation also ensures that the software is supportable by IBM Product Support.

The scope of this Install Package is limited to the installation and support of Content Collector for Email² in one (1) environment including the following activities:

- Review requirements and configuration options
- Review <IBM Cust>'s environment
 - P8 CM or CM8
 - Lotus Notes or MS Exchange
- Install Content Collector for Email
 - Content Collector for Email User-exit (CM8 environments only)
 - Content Collector for Email software
 - Content Collector for Email Platform
 - Content Collector for Email Outlook Extension (for Microsoft Outlook Mail environments only)
 - Content Collector for Email OWA Support (Outlook Web Access environments only)
 - Content Collector for Email Lotus Notes Client Template Enablement (Domino Environments only)
- Review Settings within Content Collector for Email Configuration Manager
 - Data-store
 - Connector
 - Metadata & List
 - Task-route
 - Email service
 - Notes Template enablement (Domino Environments Only)
 - Outlook Extensions (Microsoft Outlook Mail Environments Only)

¹ This Package may be used to implement either the IBM Content Collector for Email product or IBM InfoSphere Content Collector for Email product.

² The Content Collector for Email Install Package includes the installation of one (1) Content Collector for Email primary server (node) and one (1) extension server (node). Installation in a clustered environment is considered out of scope for this Install Package. Contact your Software Services Sales Leader (SS SL) for pricing for any additional services.

- Execute Sample Configuration to Test Content Collector for Email Product Functionality
 - Validate retrieval of email from a stub or link
 - Validate manual capture from folder
 - Validate manual capture from Outlook Client extension or Lotus Notes Client
 - Validate restore from email client (optional)
 - Validate search for & view a captured email
 - Validate stub or link creation
 - Validate archiving task route with system-wide retention calculation (optional)
- Perform System Administration Handoff
- Demonstrate the System to the <IBM Cust> Project Team
- Deliver project management and coordination

This Package includes a set of tasks that <IBM Cust> must complete to facilitate product installation and rollout. The duration of each task varies from customer to customer based on their knowledge of the IBM products and the complexity of the anticipated environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel necessary to install and configure the Content Collector for Email software.

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

- Course Code: F060 - IBM Content Collector Prerequisite Skills 2.1

Additionally if P8:

- Course Code: F042 – P8 Platform Administration 4.5

Additionally if CM8:

- Course Code: IM401 - IBM DB2 Content Manager V8 Implementation and Administration

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

The cost for these training courses is not included in this Content Collector for Email 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 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.

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> 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:

- Solution Implementation Manager (SIM) – Project Lead
- Software Services Consultant (Delivery Consultant)
- Field Delivery Consultant (FDC)
- Software Sales Representative (SSR)
- Sales IT Specialist (ITS)

3.2 <IBM Cust> Team Resources

<IBM Cust> will need to identify internal personnel to fill the roles of the <IBM Cust> Project Team. <IBM Cust> is responsible for selecting a Project Lead to share lead responsibilities with the ECM Project Lead.

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

- Project Lead
- IBM FileNet System Administrator
- IBM CM8 Administrator
- Content Collector for Email Administrator
- Document or Records Manager
- System Operations Coordinator
- Client Desktop Coordinator
- LAN Administrator
- Database Administrator
- Document Entry Supervisor
- End-User Manager

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 may necessarily be involved in this install service.

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

Content Collector for Email Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the Content Collector for Email system and will serve as the ongoing administrator. This individual will work closely with the Delivery Consultant during installation and configuration of the Content Collector for Email software.

IBM FileNet System Administrator (1 to 3 people) - This individual will be responsible for the administration functions of P8 CM, Content Collector for Email and IBM Enterprise Records. This individual will also provide proper passwords to allow Delivery Consultants to perform their functions in the course of the installation when access to P8 CM, Content Collector for Email, or IBM Enterprise Records is required. Attendance in the Administration classes is required and should be completed prior to the installation of the Content Collector for Email software. This individual will work closely with the Delivery Consultant during installation and configuration of the Content Collector for Email software.

IBM CM8 System Administrator (1 to 3 people) - This individual will be responsible for the administration functions of CM8, CommonStore, and IBM Records Manager. This individual will also provide proper passwords to allow Delivery Consultants to perform their functions in the course of the installation when access to CM8, CommonStore, or IBM Records Manager is required. Attendance in the Administration classes is required and should be completed prior to the installation of the Content Collector for Email software. This individual will work closely with the Delivery Consultant during installation and configuration of the Content Collector for Email software.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate delivery, <IBM Cust> has the responsibility to provide the following:

- a.) Project 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 or application of appropriate levels of patches to meet ECM's minimum requirements
 - If P8: Installation of CM.
 - If CM8: Installation of CM.
 - The Content Collector for Email server requires a separate computer or partition that runs one of the supported Windows operating systems. This computer or logical machine must be connected by a TCP/IP network to the repository server and to your Lotus Domino or Microsoft Exchange servers.
 - For Microsoft Exchange, this computer must be in the same domain as the Exchange servers.

- For Lotus Domino, this computer requires a Lotus Notes runtime. You can provide this runtime by installing a Lotus Client or a Lotus Domino server.
 - For information about the supported Windows systems, see:
<http://www.ibm.com/support/docview.wss?rs=484&uid=swg27012904#OS1>
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download the Content Collector for Email software, patches, and interim fix packs to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
 - Complete the Environment Prerequisite Checklist.
 - Have attended the required training prior to the installation of any ECM software.
- 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.) Analysis or requirements gathering of business application rules, business application processes, and application security access as they pertain to the installation of Content Collector for Email system.
- d.) Local system administrator(s) trained on the administration of the ECM products installed at <IBM Cust>.
- e.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the Delivery Consultant during the installation, he or she will be responsible for expanding the system post-installation.
- 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 IBM.
- h.) <IBM Cust> will make available all <IBM Cust> personnel required for this project based on the agreed-upon project schedule. Any significant delays caused by <IBM Cust> personnel not being available or project prerequisites not being met may result in schedule delays, which can impact the project sufficiently to require a chargeable PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2 IBM Responsibilities

- a.) Review requirements and configuration options
- b.) Review <IBM Cust>'s environment
- Deliver & Review the Environment Prerequisite Checklist
 - P8 CM or CM8
 - Lotus Notes or MS Exchange
 - Database
- c.) Install Content Collector for Email
- Content Collector for Email User-exit (CM8 environments only)
 - Content Collector for Email software
 - Content Collector for Email Client for Email Platform
 - Content Collector for Email Outlook Extension (for Microsoft Outlook Mail environments only)
 - Content Collector for Email OWA Support (Outlook Web Access environments only)

- Content Collector for Email Lotus Notes Client Template Enablement (Domino Environments only)
- d.) Review Settings within Content Collector for Email Configuration Manager
- Data-store
 - Connector
 - Metadata & List
 - Task-route
 - Email service
 - Notes Template enablement (Domino Environments Only)
 - Outlook Extensions (Microsoft Outlook Mail Environments Only)
- e.) Execute Sample Configuration to Test Content Collector for Email Product Functionality
- Validate retrieval of email from a stub or link
 - Validate manual capture from folder
 - Validate manual capture from Outlook Client extension or Lotus Notes Client
 - Validate restore from email client (optional)
 - Validate search for & view a captured email
 - Validate stub or link creation
 - Validate archiving task route with system-wide retention calculation (optional)
- f.) Perform System Administration Handoff
- Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- g.) Demonstrate the Content Collector for Email System to <IBM Cust> Project Team
- h.) Provide <IBM Cust> a completed Content Collector for Email Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) This Content Collector for Email Install Package does not include the effort to configure customer-specific use-cases or task routes.³
- b.) This Content Collector for Email Install Package is designed for new product installations only and may not be used for:
- Content Collector for Email product upgrades,
 - migration of data from IBM Commonstore or IBM FileNet Email Manager to Content Collector for Email, or migration from non-IBM email systems

³ The effort to assist <IBM Cust> to design and configure custom use-cases or task routes is included in the IBM Content Collector for Email Fast Start Package. Contact your Software Services Sales Leader for pricing for any additional services.

- integration with IBM Classification Module, IBM Enterprise Records, or other ECM components.
- c.) Installation of Content Collector for Email software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- d.) Additional resources and time for the development of “custom applications” are not included in this service.

6.2 Service Limitations

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

The Delivery Consultant may travel to <IBM Cust>'s site for **one (1)** visit for tasks associated in delivering this service. <IBM Cust> will be billed actual travel and living costs.

IBM will invoice <IBM Cust> for travel and living expenses and other reasonable expenses incurred in connection with the Package delivery. Amounts are due upon receipt of invoice and payable within 30 days. <IBM Cust> agrees to pay accordingly, including any late payment fee. <IBM Cust> does not have to pay any amount disputed in good faith while it is being investigated, but <IBM Cust> remains obligated to pay any amount not in dispute.

Additional on-site assistance requested by <IBM Cust> beyond the number of visits indicated above will be billable subject to the execution of a PCR. A visit is four or fewer days at your site by an IBM or IBM subcontract employee. IBM also reserves the right to bill <IBM Cust> for any additional trips that are the direct result of <IBM Cust>'s failure to meet or perform its obligations outlined herein.

7. Project Tasks & Deliverables

The Project Team will perform the following tasks. Deliverables for each task are detailed within the task descriptions.

7.1 Task 1: Kickoff Meeting

The purpose of this meeting is to prepare both the <IBM Cust> team and the ECM team for the Content Collector for Email Install Package. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

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

7.1.2 Define and Review Project Plan

Once selected, the joint <IBM Cust> and IBM Project Team customizes the sample project plan defining mutually agreed-upon dates for delivery (see Sample Project Plan). Each task is assigned a resource and a time window based on the effort required to complete the task. IBM strongly encourages the practice of joint task assignments as an excellent means of training and knowledge transfer for the team members.

7.1.3 Project Status

The SIM will track all issues and document their resolution in an Issues Log. Any issue whose resolution requires a change will be documented in a PCR.

7.2 Task 2: Environment Review

The SIM 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 the *Environment Prerequisite Checklist* that is delivered to <IBM Cust>. Upon completion of <IBM Cust>'s portion of this document, the SIM will schedule the software installation.

ECM recommends reviewing any questions arising from the completion of the *Environment Prerequisite Checklist* during the weekly status calls.

Meeting Agenda:

- P8 CM or CM8

7.3 Task 3: Software Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s Information Technology (IT) staff, will schedule the server software installation. <IBM Cust>'s IT staff must review the release notes included on the software media, which provides the latest information regarding operating system software release levels and patches required for software installation.

A member of <IBM Cust>'s IT staff must have attended the appropriate Administration training prior to this step to facilitate appropriate system configuration choices and ease support transition to <IBM Cust>.

The Delivery Consultant performs the following steps for installation:

- Install Content Collector for Email User-exit (CM8 environments only)
- Install Content Collector for Email software
- Install Content Collector for Email Client for Email Platform
 - Microsoft Exchange
 - Content Collector for Email Outlook Extension
 - Content Collector for Email OWA Support (Outlook Web Access environments only)
 - Lotus Domino
 - Content Collector for Email Lotus Notes Client Template Enablement
 - Enable one standard Notes template
 - Test Domino Web Access (Domino Web Access environments only)

7.4 Task 4: Review Settings within Content Collector for Email Configuration Manager

The Delivery Consultant will review the following with <IBM Cust>'s Content Collector for Email Administrator to prepare for the Sample Configuration.

- Data-store – contains the information about the database server and the Content Collector for Email configuration database
- Connector – lists the email and/or file connections selected during software install process
- Metadata & List – used to create customized metadata properties or lists for use in Task Routes
- Task-route – area used to create Task Routes. Task Routes are a series of tasks to be performed on a document, most commonly to move it from an e-mail server, a file server or some other source to a document repository. A task route can include rules that determine which task in the task route should be performed next.
- General Settings – section used to configure various components within Content Collector for Email.
- Notes Template enablement (Domino Environments Only) – menu list installed in to the Notes client that enables users to perform some Content Collector for Email tasks from within the client (This is an optional install.)
- Outlook Extensions (Microsoft Outlook Mail Environments Only) – menu list installed in to the Outlook client that enables users to perform some Content Collector for Email tasks from with the client (This is an optional install.)

7.5 Task 5: Execute Sample Configuration to Test Product Functionality

The Delivery Consultant along with <IBM Cust>'s Content Collector for Email Administrator will utilize the Content Collector for Email Configuration Manager to configure the out-of-the-box task routes⁴ to execute product functionality testing. This is an opportunity for <IBM Cust> to learn how to configure and maintain the system following this Package.

Each of the tasks listed below test a portion of the interaction between the email server, repository server, and the Content Collector for Email server.

- Validate retrieval of email from a stub or link
- Validate manual capture from folder
- Validate manual capture from Outlook Client extension or Lotus Notes Client (Optional)
- Validate restore from email client (optional)
- Validate search for & view a captured email
- Validate stub or link creation
- Validate archiving task route with system-wide retention calculation (optional)

⁴ Configuration and testing of customer-specific task routes, user acceptance testing, and performance testing is not included in this service.

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

The Delivery Consultant will review the Content Collector for Email product configuration with the <IBM Cust> System Administrator to better prepare <IBM Cust> for further expansion of the system. The Delivery Consultant will reinforce topics covered in the Learning Services courses required for this Install Package.

7.6.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <IBM Cust>'s System Administrator with respect to maintenance of the Content Collector for Email system. These are tasks that should be performed daily and will be specific to <IBM Cust>'s usage of the Content Collector for Email system and its configuration. IBM recommends that the System Administrator develop a schedule of "housekeeping" procedures and tasks to be performed. Topics may include:

- Backup configuration database
- Check Content Collector for Email logs
- Check the temporary working directory for email or files not being processed
- Ensure Content Collector for Email Windows services are running

7.6.3 Review Backup Methodologies

The Delivery Consultant will review possible basic backup strategies with the <IBM Cust> System Administrator. This Install Package does not provide for the Delivery Consultant 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 Delivery 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 and will be able to resolve or report them as necessary.

For integrity issues, IBM requests that <IBM Cust> contact IBM Customer Support by using the IBM toll free Customer Service telephone number 1-800-426-7378 or 1-800-IBM-SERV.

7.7 Task 7: Demonstrate System to <IBM Cust> Project Team

After the initial configuration has been tested, the Delivery Consultant will demonstrate the Content Collector for Email system 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: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> a Install Completion Checklist which constitutes completion of this project. Please refer to the *IBM Content Collector for Email Install Completion Checklist*.

If issues arise after delivery of the Project Completion Checklist, <IBM Cust> should contact IBM Customer Support by using the IBM toll free Customer Service telephone number 1-800-426-7378 or 1-800-IBM-SERV.