



***IBM Customer*** ***IBM FileNet Magnetic Storage  
and Retrieval Migration  
Mentoring Package  
Service Description***

January 1, 2011



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## 1. Description of Services

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

- IBM FileNet Magnetic Storage and Retrieval Migration Mentoring (MSAR Migration Mentoring) Package

**NOTE: The MSAR Migration Mentoring Package can only be sold to follow a previously ECM-delivered MSAR Install Package.**

This service will provide <IBM Cust>'s system administrator with the skills and knowledge necessary to manage the migration of primary optical media to MSAR on their production system.

The Delivery Consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed by other ECM Software Services deliveries. The actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the MSAR solution.

The MSAR Migration Mentoring Package will include the following activities:

- Review <IBM Cust>'s migration requirements<sup>1</sup>
- Review of MSAR functionality with <IBM Cust>'s system administrator(s).
- Create optical migration jobs for one set of optical platters (either primary or tranlog)
- Delivery migration mentoring for <IBM Cust>'s system administrator(s) regarding "best practices" (how to execute optical migration jobs, job management, and reconciliation).
- System Administration Handoff
- Demonstrate migration results to the project team
- Project management and coordination to facilitate a smooth and professional project delivery.

The scope of this MSAR Migration Mentoring Package is limited to support of IBM FileNet Image Services (IS).

This package includes a set of tasks that <IBM Cust> must complete to facilitate a migration. The resources outlined in this plan will include both the IBM and <IBM Cust> personnel that are required to manage the MSAR migration effort.

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

- Course Code: F4580 – IS System Administration

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<sup>1</sup> Installation of prerequisite products (hardware and software) required for the MSAR Platform is <IBM Cust>'s responsibility. Please see the **Hardware/Software Requirements for FileNet Products** document found on <http://www-01.ibm.com/software/sw-atoz/indexF.html>.

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 this training course is not included in this MSAR Migration Mentoring 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](mailto:ecmeduna@us.ibm.com) or 800-455-7468.

IBM Learning Services web site:

[www.ibm.com/software/data/content-management/training.html](http://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 Software Services 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 Software Services Team Resources

The ECM Software Services Project Lead coordinates the appropriate ECM Software Services resources as required. The ECM Software Services Team typically includes the following members:

- Project Manager (PM) – Project Lead
- IT Consulting Specialist (Delivery Consultant)
- 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 Software Services Project Lead.

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

- Project Lead
- FileNet System Administrator
- System Operations 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 migration. Likewise, not all of the individuals may necessarily be involved in this Migration service.

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

FileNet System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the MSAR Migration and will serve as the on-going administrator. This individual will work closely with the Delivery Consultant during analysis and configuration of the migration.

## 5. Responsibilities

### 5.1 <IBM Cust> Responsibilities

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

- a.) Project Prerequisites
  - All prerequisites must be met before IBM can begin the configuration of the product.
  - The most recent version of IS (4.1.x) is installed and properly configured for MSAR. Improperly installed or incomplete system configuration may necessitate a PCR to this project if <IBM Cust> desires IBM to correct system deficiencies.
  - MSAR implemented using the MSAR Install Package.
  - All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software. This includes:
    - Installation and/or application of appropriate levels of patches to meet ECM's minimum requirements
  - MSAR Install has been executed via ECM-delivered MSAR Install Package.
  - Ensure <IBM Cust> is running the currently supported IS software release. IS version 4.1.x must already be installed, configured, and fully operational prior to the commencement of the MSAR Migration Mentoring Services.<sup>2</sup>
  - Perform a network check (verify server connectivity to network, addressing, correct protocol).
  - All prerequisite hardware and software has been installed onto <IBM Cust>'s designated ECM servers.
  - Have attended the required training prior to the installation of any ECM software.
- b.) <IBM Cust> acknowledges that:
  - i. Additional resources and time for the development of "custom applications" are not included in this service.
- c.) 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

<sup>2</sup> This service is outside the scope of the MSAR Migration Mentoring Package. IBM can perform the IS Install for <IBM Cust>. <IBM Cust> will need to purchase the appropriate IS Install package.

- Sign project-related documents
- d.) At least one member of the <IBM Cust> Project Team, to be trained in the migration process, must have prior IS System Administrator training and experience.
- e.) Local help desk personnel trained on the FileNet client products to be installed at <IBM Cust>.
- f.) Adequate facilities for each Delivery Consultant including:
  - cubicle, desk, telephone, and Internet access,
  - remote access (e.g. VPN access),
  - direct access to the keyboard.
- g.) When performing remote work, <IBM Cust> will provide VPN access into <IBM Cust>'s network and remote access to a workstation in the network that:
  - can connect to all required servers and
  - is pre-loaded with all required connectivity tools appropriate to <IBM Cust>'s environment.
- h.) Product Subscription and Support Agreement in place through IBM.
- i.) <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

The IBM responsibilities for this package include:

- a.) Provide project management and reporting
- b.) Conduct a migration analysis, develop a migration strategy for moving ECM documents to the new MSAR surfaces, and document the migration strategy
- c.) Provide a MSAR Migration document
- d.) Create <IBM Cust> optical migration jobs for one (1) set of optical platters (either primary or tranlog)
- e.) Mentor <IBM Cust> IBM FileNet System Administrator on how to execute optical migration jobs, job management, and reconciliation
- f.) Perform System Administration Handoff
  - Transfer of Information
  - Problem Reporting
- g.) Demonstrate the migration results to the project team
- h.) Provide <IBM Cust> a completed MSAR Migration Mentoring Checklist

## 6. Limitations

### 6.1 Service Limitations

The MSAR Migration Mentoring 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 Software Services 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.

### 6.1.1 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 will travel to <IBM Cust>'s site for **one** (1) visit for tasks associated with 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 onsite 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 Software Services team for the MSAR Migration Mentoring Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

#### 7.1.1 Review Project Services Description

The ECM Software Services Project Lead will review the Service Description, the tasks, 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. The duration of the MSAR Mentoring Migration is dependent on the number of documents and the availability of <IBM Cust>'s System Administrator to perform the services.

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

### 7.1.3 Project Status

The PM 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: Migration Analysis

This portion of the migration mentoring service will assist <IBM Cust> with identifying the requirements for their MSAR migration configuration. IBM will evaluate <IBM Cust>'s document migration requirements with regards to priority and magnetic disk space. The output of the requirements gathering will be a design document (MSAR Migration Document) recommending <IBM Cust>'s MSAR Migration Strategy.

## 7.3 Task 3: Optical Migration Mentoring

The Delivery Consultant will configure the copy jobs, migrate the first platter, and mentor <IBM Cust> personnel to perform the remainder of the migration.

The Delivery Consultant will provide technical support for the migration process to the first platter, and to analyze all copy job procedures, including a review of the Copy Logs, with <IBM Cust>'s System Administrator.

The Delivery Consultant will validate the initial migration by retrieving 35 random documents from the migrated platter. Retrieval of the documents will constitute project completion.

Migration mentoring includes the following:

- Copy job set-up
- Copy one platter
- Migration procedures and user documentation for Migration Tools
- Mentoring
- Initial migration and image retrieval testing
- Ten hours of post-training telephone support<sup>3</sup>

IBM will provide ten hours of technical phone support. This support will be accrued in thirty (30) minute minimum increments (maximum total of 20 calls). If <IBM Cust> requires additional technical support, IBM will issue a PCR, and charge for support bi-weekly as incurred, at standard technical support rates.

## 7.4 Task 4: System Administration Handoff

### 7.4.1 Transfer of Information

The Delivery Consultant will review the MSAR Migration Mentoring activities as well as MSAR functionality with <IBM Cust> System Administrator.

### 7.4.2 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

<sup>3</sup> Additional telephone support may be purchased. Please contact your Software Services Sales Leader for options.



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.

## 7.5 Task 5: Demonstrate Migration Results to <IBM Cust> Project Team

After the initial samples have been tested, the system is demonstrated to the <IBM Cust> Project Team. The demonstration is an opportunity to share ideas on how to best configure the system, gather immediate feedback on issues that may have been overlooked, and solicit suggestions for system improvements. Other uses for the system are often identified in such meetings, giving impetus for follow-on projects.

## 7.6 Task 6: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> a completed Migration Mentoring Checklist which constitutes completion of this project. Please refer to *MSAR Migration Mentoring Project 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.