IBM

IBM Customer

IBM OnDemand for Multiplatforms Install Package Service Description

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1. Description of Services

Information Management Analytics & Optimization (IMAO) is pleased to submit this Service Description to IBM Customer (<IBM Cust>). <IBM Cust> has requested the following services from IBM:

> ➢ IBM OnDemand for Multiplatforms (CMOD) Install Package

This service provides the expert resources to install the CMOD software at your site. It also provides hands-on assistance to address questions, recap key issues covered in formal training classes, and to verify 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 Delivery Consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed by other Enterprise Content Management (ECM) installations. The completed installation also ensures that the software is supportable by IBM's Support organization.

The scope of this Install Package is limited to the installation and support of CMOD[1].

This CMOD Install Service will provide:

- Review <IBM Cust>'s environment

- Install the following components:

    - One DB2 Universal Database & Administrator Client

    - One Limited Content Manager OnDemand Environment

    - Install Websphere Application Server

    - Install ODWEK

    - Install WEBi client

- Create up to three Basic Sample Applications

- Configure Sample Environment for Testing

- System Administration Handoff

- Demonstrate the System to the Project Team

- Project management and coordination to facilitate a professional project delivery

This Install Package includes a set of tasks that <IBM Cust> must complete to facilitate a 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 CMOD environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel that are required to install and configure the CMOD 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

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[1] This service is limited to the installation or configuration of one Content Manager OnDemand for MultiPlatforms environment consisting of one (1) combined CMOD Server. Installation and configuration of Tivoli Storage Manager (TSM) is not included in this effort. Installation and configuration of any additional services other than those required as part of the installation of CMOD are considered additional options.   Contact your Lab Services Sales Manager (LS SM) for any additional options.

<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 Package[2].

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

- Course Code: IM170 – IBM DB2 Content Manager OnDemand System 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 CMOD 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 IMAO 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 IMAO Software Services Team Resources

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

- Solution Implementation Project Manager (SIM) – Project Lead
- Lab Services IT Specialist (Delivery Consultant)

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[2] Services to configure all site and user specific preferences can be accommodated on a Time & Materials. Contact your Lab Services Sales Manager for pricing.

- Field Delivery Consultant (FDC)
- Software Sales Representative (SSR)
- Software 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 IMAO Software Services Project Lead.

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

- Project Lead
- IBM CMOD System Administrator
- Windows and/or Unix Administrator (as necessary)
- Infrastructure Coordinator
- LAN Administrator
- Database Administrator

3.3 <IBM Cust> System Design Resource

<IBM Cust> will need to provide a System Design resource to conduct requirements analysis and system planning for <IBM Cust>'s OnDemand application. This resource will also be responsible for developing a System Design Document that reflects the results of these analysis tasks.

The System Design Resource can be an IMAO Software Services resource, an IBM Partner resource, or an individual who is on <IBM Cust>'s staff with strong ECM design and administration knowledge. The effort for this resource is not included in this package and must be engaged separately.

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 IMAO Software Services Project Lead.

IBM CMOD System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the OnDemand system and will serve as the on-going administrator. Attending the IBM DB2 Content Manager OnDemand V8 Implementation and Administration class is required and should be completed prior to the installation of the software. This individual will work closely with the Delivery Consultant during installation and configuration of the CMOD software.

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

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 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 a supported operating system
  - ➢ Installation of a supported database (if not using DB2) & client for CMOD
  - ➢ Installation and application of appropriate levels of patches to meet ECM's minimum requirements
- All prerequisite hardware and software has been installed onto <IBM Cust>'s designated ECM servers.
- Complete the installation of a supported database (if not using DB2) & client for CMOD and provide a database administrator for any database configuration efforts.
- Have attended the required training prior to the installation of any ECM software.
- Perform a network check (verify server connectivity to network, addressing, correct protocol).
- Download the IBM CMOD software prior to the resource arriving at <IBM Cust>'s facility.
- Complete the *Environment Prerequisite Checklist*.

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 and requirements gathering of business application rules, business application processes, and application security access as they pertain to the implementation of CMOD.

d.) Local system administrator(s) trained on the administration of ECM products to be installed, IBM Content Manager OnDemand 8.

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 CMOD configuration post-installation.

f.) Product Subscription and Support Agreement in place through IBM.

g.) Adequate facilities for the Delivery Consultants; including cubicles, desks, and telephone, hardware and Internet access service.

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 Environment

- Deliver & Review *Environment Prerequisite Checklist*

b.) Provide CMOD Installation Questionnaire

c.) Install

- One DB2 Universal Database & Administrator Client
- One Limited Content Manager OnDemand Environment
- Install Websphere Application Server
- Install ODWEK
- Install WEBi client

d.) Configure up to three Basic Sample Configurations

- A basic sample application will not require modification to the input data, e.g. line data

e.) Configure CMOD for Sample Environment using the three sample applications

f.) Test environment

g.) Perform System Administration Handoff

- Transfer of Information
- Routine Maintenance
- Backup Methodology
- Problem Reporting

h.) Demonstrate Product to the Project Team

i.) Provide <IBM Cust> a completed CMOD Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

a.) Installation of CMOD software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.

b.) The CMOD Install service does not include the effort to install and configure Tivoli Storage Manager.[3]

c.) Additional resources and time for the development of "custom applications" are not included in this service.

6.2 Service Limitations

The CMOD 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.

IMAO 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.

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[3] Contact your LS SM for services to install TSM.

6.2.1 Travel & Living Expenses

This Package does **not** include domestic travel and living expenses incurred by IMAO Software Services 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 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 on-site assistance requested by <IBM Cust> beyond the number of visits indicated above will 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 IMAO Software Services team for the CMOD Install Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The IMAO Software Services 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 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 IBM SIM & 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 *Environment Prerequisite Checklist* that was delivered to the <IBM Cust>. Upon completion of <IBM Cust> portion of this document, the SIM will then schedule the software installation.

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

7.3   Task 3: Software Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s CMOD 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 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>.

7.3.1   CMOD Installation

The Delivery Consultant will:

- Install Websphere Application Server
- Install DB2 Universal Database & Administrator Client
- Install Limited Content Manager OnDemand Environment
- Install ODWEK
- Install WEBi client

7.3.2   Create 3 Basic Sample Applications

Using a line data report, the Delivery Consultant along with the <IBM Cust>'s CMOD System Administrator will create three line data applications with a maximum of three (3) index values.

7.3.3   Configure & Test

Once configured, testing will ensue to validate that the system is operational. The Project Team members can use this phase as a learning process to ensure they understand the complete installation and testing process of the CMOD system.

7.4   Task 4: System Administration Handoff

7.4.1   Transfer of Information

The Delivery Consultant will review the product 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 as required in this Install Package.

7.4.2   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.

7.4.3 Review Backup Methodologies

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

7.4.4 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> CMOD 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).

7.5 Task 5: Demonstrate System to <IBM Cust> Project Team

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

7.6 Task 6: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *OnDemand for MultiPlatforms 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 (1-800-429-7378).