



IBM Customer ***IBM FileNet Content Manager
Fast Start 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 FileNet Content Manager Fast Start (CM) Package

This service is designed to provide a solid foundation for <IBM Cust>'s Enterprise Content Management (ECM) implementation. It provides hands-on assistance with configuring the system to <IBM Cust>'s specific requirements for document storage by addressing questions, recapping key issues covered in formal training classes, and verifying 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 guide <IBM Cust> on proven strategies and procedures that have been employed by other ECM customers.

The scope of this Fast Start Package is limited to the support of CM¹ with the creation of one pre-defined Object Store.

The CM Fast Start Service includes the following activities:

- Review of <IBM Cust>'s environment
- Document analysis and requirements gathering
- Creation of a CM design document
- Configuration of the system based upon the CM design document
- Validation of the system
- System administration review
- Delivery of the final CM design document
- Demonstration of the system to the Project Team
- Up to two site visits
- Project management and coordination to facilitate a professional project delivery

This Fast Start Package includes a set of tasks that <IBM Cust> must complete to facilitate a product 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 CM environment.

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

At the completion of the CM Fast Start Package <IBM Cust>'s system and resources will be ready for maintenance support and for initiating the process to expand the system for <IBM Cust>'s specific business requirements. As part of this Fast Start service, IBM will work with individuals knowledgeable on <IBM Cust> content storage requirements to create the <IBM Cust> specific definition of the system.

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).

¹ The CM Fast Start Package includes the configuration of the CM software on one environment at <IBM Cust>'s site. Installation and configuration of any additional services other than those required as part of this Fast Start service are considered additional options. Please contact your Lab Services Sales Manager (LS SM) for services beyond this scope of this Package.

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: F042 – P8 Platform Administration 4.5

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

The cost for these training courses is not included in this CM Fast Start 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)
- 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 IMAO Software Services Project Lead.

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

- Project Lead
- FileNet P8 System Administrator
- Web Master
- Database Administrator
- Document and/or Records Manager
- 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 IMAO Software Services Project Lead.

IBM FileNet P8 System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the CM system and will serve as the on-going administrator. Attending the P8 Platform Administration class is required and should be completed prior to the installation of the software as well as this Fast Start service. This individual will work closely with the Delivery Consultant during the configuration of the IBM FileNet software.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate delivery, <IBM Cust> is responsible for providing the following:

- a.) Project Prerequisites
 - All prerequisites must be met before IBM can begin the configuration of the product.
 - Successful installation of at least one IBM FileNet P8 Content Manager (Development or Test environment)
 - Local system administrator(s) trained on the administration of the ECM products to be installed at <IBM Cust>, specifically the P8 Platform Administration course.
- 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 rules, business processes, and document and content security access as they pertain to the configuration of the CM system.

- d.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the Delivery Consultant during the Fast Start, he or she will be responsible for completing the following items.
- Expansion of Security Schema
 - Expansion of Users and/or Groups
 - Creation of Additional Object Stores
 - Creation of Additional Custom Properties
- e.) Adequate facilities for the IMAO Software Services resources including: cubicles, desks, and telephone, hardware and Internet access service. IBM recommends reserving a conference room with presentation projector, network access, and a white board or flip chart for the on-site visits.
- f.) Product Subscription and Support Agreement in place through IBM.
- g.) <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.) CM Design Requirements Gathering
- Object Store Architecture
 - Document Type Analysis
 - Security Analysis
 - Users, Groups, Roles Definition
 - Document Classes Definition
 - CM Design Document Development
- b.) Create one Object Store
- c.) Configure CM as defined in the CM Design Document
- Define up to ten initial Users and/or Groups
 - Create up to ten initial Custom Property Templates
 - Create up to ten Choice Lists (optional)
 - Create up to five Document Classes
 - Create up to five Security Policies (optional)
 - Create up to five Storage Areas and/or Storage Policies
 - Create up to five Folders
 - Create up to five Entry Templates
 - Create up to five Search Templates
 - Configure Access Roles and Actions Site Preferences
- d.) Test CM System
- e.) Perform System Administration Handoff

- Transfer of Information
 - Problem Reporting
- f.) Demonstrate the CM System to <IBM Cust> Project Team
- g.) Provide <IBM Cust> a completed CM Fast Start Checklist
- h.) Deliver Final CM Design Document

6. Assumptions & Limitations

6.1 Assumptions

- a.) The Fast Start service does not perform the analysis or design to implement <IBM Cust>'s IBM FileNet software for High Availability (HA) or Disaster Recovery (DR) use.²
- b.) Additional resources and time for the development of "custom applications" are not included in this service.

6.2 Service Limitations

The CM Fast Start 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.

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 up to **two** (2) 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.

² Please contact your LS SM for HA or DR services.

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 CM Fast Start Project. 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 Install Package Service Description, the 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.

7.3 Task 3: Document Analysis Requirements Gathering

ECM systems can be configured in a variety of ways in order to meet the requirements of a given business. An adequate configuration that meets <IBM Cust>'s content management needs begins with valid business assumptions. The Delivery Consultant discusses various business requirements with <IBM Cust> and develops a set of guidelines that the team employs during the implementation. Prior to acceptance by the Project Team, <IBM Cust> reviews these guidelines for accuracy. Should the underlying business requirements change, the configuration may also require changes to reflect the new guidelines.

The Fast Start is specially designed to ask the necessary questions and guide <IBM Cust> through the design and implementation process of a CM system. The Delivery Consultant will perform a document analysis in regards to the customization of the IBM content storage to match the defined needs of the business utilization. Tasks include defining document classes, custom properties, and security configuration. The Delivery Consultant will create a CM Design Document with the information gathered during this analysis³. This document will be used to communicate with <IBM Cust> personnel for additional information and clarification.

³ The ECM Consultant time required for doing the analysis and creating the design document should not exceed four (4) days.

The Delivery Consultant will gather information on <IBM Cust>'s object usage, type, security, etc. The Delivery Consultant will work with <IBM Cust> Project Team to determine the business requirements, business rules, and desired outcome for <IBM Cust>'s CM System. This will define how objects are managed.

7.3.1 Define Document Classes and Properties

At the outset of the project, the Project Team determines the types of content to be managed within the CM System. The Delivery Consultant assists <IBM Cust> in collecting and recording the following information:

- Types of documents and/or objects specific to <IBM Cust>'s business
- Object Stores
- Choice Lists
- Custom Properties
- Document Classes
- Entry and Search Templates
- Security Templates and Policies

7.3.2 Determine Security Strategies and Security Access

The Delivery Consultant discusses the security tools and strategies available to <IBM Cust> so that the CM System Administrator can begin to formulate and implement an evolving security mechanism and procedure.

Areas of discussion include:

- The various security strategies (or methods of implementation) that the system can accommodate and which of these are best suited to <IBM Cust>'s requirements.
- How to organize users into different security and/or access groups.
- Determining the types of functions (system capabilities) that are appropriate for, or required by, users.
- Determining the security types required by the business needs.
- Determining which types of functions should be restricted to different classes of users and/or groups.

7.3.3 Develop CM Design Document

The Delivery Consultant will build a CM Design Document based on the information gathered in the previous tasks. This document describes the configuration settings, users, groups, object stores, document classes, custom properties, security profiles, and all other pertinent data for a complete production system. The Delivery Consultant will provide <IBM Cust> with a copy of the CM Design Document. This document is the guidebook for subsequent software configuration and testing by IBM and <IBM Cust>.

Upon review and agreement of the details within the CM Design Document, the SIM will schedule the configuration of the system.

7.4 Task 4: Configure <IBM Cust>'s System

This phase includes hands-on instruction on defining parameters of the object store.

7.4.1 Initial Security Setup

The Delivery Consultant defines up to ten user and/or group profiles based on the <IBM Cust> -supplied information.

7.4.2 Initial Property & Document Class Setup

The Delivery Consultant will guide the <IBM Cust> team in configuring up to five document classes and up to ten (10) custom properties for the validation of system readiness. Once the initial objects have been placed under CM system control, object method functionality (check-in, checkout, retrieval and printing) is validated. The Project Team members can use this phase as a learning process to verify they understand the database setup, modification, and testing process of the CM system.

7.4.3 Add Folders

The Delivery Consultant will guide the <IBM Cust> team in configuring up to five folders for content storage. Folder configuration includes defining an appropriate folder structure as well as the security to be applied to that structure.

7.4.4 Configure Entry and Search Templates

The Delivery Consultant will guide the <IBM Cust> team in configuring up to five Entry and five Search Templates. These templates will be configured to allow easy usage by <IBM Cust>'s CM users so that content can be both entered and retrieved quickly, easily and accurately.

7.5 Task 5: Test CM System

The Delivery Consultant will guide the <IBM Cust> team in properly testing the objects added in section 7.4 above. This includes adding and searching for content, as well as testing the security configuration by accessing the system as different types of user. This testing will be performed via the Workplace or WorkplaceXT web applications.

7.5.1 Load Sample Objects

Once the Object Store has been configured, <IBM Cust> will supply sample content. This is loaded into the system with the security privilege and properties denoted by <IBM Cust>.

7.5.2 Object Access Validation

Once sample content has been loaded into the system, the Delivery Consultant and the <IBM Cust> System Administrator will execute a set of routine business processes with the samples. The following user functions will be validated:

- Log on and log off
- Add and delete an object
- Modify an object's properties
- Add a folder
- Modify a folder's properties
- Check in and check out a document

- Search for object

7.6 Task 6: Configure Workplace or WorkplaceXT Access Roles and Actions Site Preferences

This phase addresses some of the user interface options of the Workplace or WorkplaceXT web applications. The purpose is to configure some elements of the interface so that only appropriate on-screen controls are available to end users. This is achieved by modifying some out-of-the-box site preferences.

The Delivery Consultant will guide the <IBM Cust> team in configuring the Workplace or WorkplaceXT Access Roles and Actions Site Preferences so that users will be presented only with appropriate controls when using the system. This allows for greater control of the system, and helps prevent improper access to functionality that can lead to problems as the system expands.

7.7 Task 7: System Administration Handoff

7.7.1 Transfer of Information

The Delivery Consultant will review the CM 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 required for this Package. Topics to be reviewed:

- Entering property definitions into the system as part of the configuration
- Entering class definitions data into the system as part of the configuration
- Entering security profile definitions data into the system as part of the configuration
- P8 Platform Documentation

7.7.2 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 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 (1-800-429-7378).

7.8 Task 8: Demonstrate System to <IBM Cust> Project Team

After the initial samples have been tested, IMAO Software Services will demonstrate the CM 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.

7.9 Task 9: Final CM Design Document

Upon completion of the testing and demonstration, the Delivery Consultant will update the CM Design Document with any notes or modifications and deliver a final version. IMAO Software Services recommends storing this document with the Platform and Architecture Configuration delivered by your Field Delivery Consultant during the

installation of the environment. These documents represent a starting point for on-going maintenance and modification of the system.

7.10 Task 10: Project Completion Checklist

Upon demonstration of the product, the Delivery Consultant will deliver to <IBM Cust> a completed Fast Start Checklist which constitutes completion of this project. Please refer to *IBM FileNet Content Manager Fast Start 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).