



IBM Customer *IBM Content Integrator plus 2
Connectors Install
Service Description*

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1. Description of Services

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

- Install Package for IBM Content Integrator plus 2 Connectors (ICI + 2 Connectors) Install Package

This Install package will facilitate the smooth and rapid deployment of ICI + 2 Connectors to enable federation of two source repositories. The Delivery Consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed at other ECM installations. The actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the ICI solution.

The ICI + 2 Connectors Install Package will provide basic technical planning, installation, testing, and support review for an ICI base installation. The two source repositories must have been previously installed and must be fully operational prior to the initiation of the ICI + 2 Connectors Install Package.

- Review <IBM Cust>'s current environment to understand the document flow, ingestion location, document classes, indices or properties, security, etc.
 - Prepare to implement two Connectors for <IBM Cust>'s selected, supported repositories
 - Supported repositories may be found:
(<http://www-01.ibm.com/support/docview.wss?rs=2169&uid=swg21267053>)
- Implement ICI + 2 Connectors on <IBM Cust>'s one environment.
 - Install IBM Content Integrator (ICI) 8.5 or higher
 - Configure <IBM Cust>'s ICI + 2 Connectors (one library, docbase, or object store per connector)¹
- System Administration Handoff
- Project management and coordination to facilitate a smooth and professional project delivery.

This Install Package includes a set of tasks that <IBM Cust> must complete to facilitate a product installation. The resources outlined in this plan will include both the IBM and <IBM Cust> personnel that are required to install and configure the ICI environment.

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 administration training for the selected repositories.

3. Resources

The <IBM Cust> Installation 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.

¹ The ICI + 2 Connectors Install Package includes the installation of two connectors limited to one library server, docbase, or object store per connector. Installation and configuration of additional connectors in order to connect to additional library servers or object stores are considered additional options. Contact your Lab Services Sales Manager (LS SM) for pricing for any additional services.

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 Manager (SIM) – Project Lead
- Lab Services IT Specialist (Delivery Consultant)
- Software Sales Representative (SSR)
- Sales IT Specialist (ITS)

3.2 <IBM Cust> Resources

<IBM Cust> must 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
- Connector Repository System Administrators (e.g. CM8, CS, Documentum, OpenText, etc.)
- Windows Server Administrator
- System Operations Coordinator
- LAN Administrator

4. Role Definitions

<IBM Cust> must 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 will necessarily be involved in this install.

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

ICI System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the ICI system, and will serve as the on-going administrator. This individual will work closely with the Delivery Consultant during installation and configuration of the IBM software. IBM strongly recommends that this individual become familiar with the ECM products by enrolling in IBM training prior to project initiation.

Repository Administrators (1 to 3 people) - These individuals will assume responsibility for <IBM Cust>'s selected supported repositories. These individuals must understand the content configuration for these repositories as needed by the Delivery Consultant. These individuals will also provide proper passwords for the Delivery Consultant to perform his or her functions in the course of the installation when access to these repositories is required.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate an installation, <IBM Cust> must provide:

a.) Prerequisites

- All prerequisites must be met before IBM can begin the installation of the product.
- Installation of the external Repositories and validation that the software is operating as expected, if necessary.
- All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased ICI software. This includes:
 - Installation of the server environment prerequisites²
 - Installation and/or application of appropriate levels of patches to meet ECM's minimum requirements
 - 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.
- 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/or requirements gathering of business application rules, business application processes, and application security access as they pertain to the configuration of the CM system.

d.) Local system administrator(s) trained on the administration of ECM products installed at <IBM Cust>.

e.) Product Support Agreement in place through IBM.

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.

² Installation of ICI may be on a stand-alone or co-located server. IBM recommends utilizing a stand-alone server in Production or high usage environments.

- 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

IBM will provide the following activities.

- a.) Provide project management and reporting
- b.) Review <IBM Cust>'s Environment
 - Deliver & Review Environment Prerequisite Checklist
- c.) ICI requirements gathering
 - Provide the requirements for the two selected repositories
- d.) Install ICI v8.5 or higher Software
- e.) Configure <IBM Cust>'s ICI
 - Configure First Source Repository Connector (one library, doabase, or object store)
 - Configure Second Source Repository Connector (one library, doabase, or object store)
- f.) Test
- g.) System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- h.) Demonstrate Query ICI + 2 Connectors
- i.) Provide <IBM Cust> a completed ICI + 2 Connectors Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) <IBM Cust>'s external repositories have previously been installed, configured, and validated as operating as expected prior to the initiation of this project (if necessary).
- b.) IBM ICI software has been downloaded to the appropriate servers prior to the resource arriving at <IBM Cust>'s site.
- c.) <IBM Cust> is running the currently supported IBM software releases.
- d.) ICI cannot be installed in a clustered environment.

6.2 Service Limitations

The ICI + 2 Connectors 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 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

7.1 Task 1: Kickoff Meeting

This meeting is to prepare the <IBM Cust> and IMAO Software Services project team for the ICI installation and configuration. 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 Service Description, tasks, 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

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 team will review the software purchased, <IBM Cust>'s the technical environment and system architecture, 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.

Meeting Agenda:

- <IBM Cust>'s System Diagram
 - Network Configuration
 - Both Source Repositories
 - ICI Server, OS, versions, and any other products installed on this server
- ICI Software Installation prerequisites

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: Requirements Gathering

This portion of the Install service will assist <IBM Cust> with identifying the requirements for their ICI configuration. The Delivery Consultant will review the custom properties & security credentials to configure the ICI Connectors selected.

Select two of the supported Connectors listed in the <web site>.

7.4 Task 4: ICI Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s Information Technology staff, 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.

Once there is a defined configuration, the Delivery Consultant will install the ICI software.

7.5 Task 5: Configure ICI

The Delivery Consultant follows the software installation and uses the ICI Administration tool to configure the connectors to the selected repositories.

- Configure the two Source Repository Connectors (one library, doabase, or object store per connector)

7.6 Task 6: Test ICI

Once ICI is configured for the two repositories, the Delivery Consultant and the <IBM Cust> System Administrator will execute a sample test to demonstrate running a query against each repository. The <IBM Cust> Project

Team members can use this phase as a hands-on learning process to ensure they understand the product configuration and testing process of the ICI system.

7.7 Task 7: System Administration Handoff

7.7.1 Transfer of Information

The Delivery Consultant will review the ICI functionality with <IBM Cust>'s system administrator(s).

- Connector Configuration
- Sample Query
- ICI Administration Tool

7.7.2 Routine Maintenance

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

7.7.3 Review Backup Methodologies

The Delivery Consultant will review possible 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.

7.7.4 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 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 product has been tested, the system is demonstrated to the <IBM Cust> Project Team by running a query against each repository. The demonstration is an opportunity to share ideas on how to best to further expand the system post-installation, 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: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> a completed Project Completion Checklist which constitutes completion of this project. Please refer to ICI + 2 Connectors *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 (1-800-429-7378).