

<b>Support Services</b>
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**Project Support Services for <Customer Name>**

**IBM WebSphere Commerce Suite for Implementation Services for Blueprint Customization**

**See Attachment: Sample Statement of Work for use by IBM Business Partner**

*By signing below, each of us agrees that the complete agreement between us regarding these Project Support Services and/or Deliverables consists of 1) this SOW, and 2) the BUSINESS PARTNER Customer Agreement or BUSINESS PARTNER Agreement for Services, as applicable (or any equivalent agreement signed by both of us) ("Reference Agreement"). If no such executed, written Reference Agreement between us exists, the terms of the current form BUSINESS PARTNER Customer Agreement are hereby incorporated by reference in their entirety, and the term "Reference Agreement" shall refer to such incorporated terms. Once signed, any reproduction of this SOW by reliable means (for example, photocopy or facsimile) is considered an original, unless prohibited by local law.*

Agreed to:

Agreed to:

**<Customer Name>**

**Business Partner**

By: \_\_\_\_\_  
Authorized signature

By: \_\_\_\_\_  
Authorized signature

Name: \_\_\_\_\_  
(type or print)

Name: \_\_\_\_\_  
(type or print)

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Reference Agreement number:

Customer number:

Statement of Work number:

Customer address:

address:

Customer "Bill To" address, if different:

This SOW defines the scope of work to be accomplished by BUSINESS PARTNER under the terms and conditions of the Reference Agreement.

## 1.0 Overview

BUSINESS PARTNER is pleased to respond to request of <Customer Name> for Project Services. BUSINESS PARTNER Consultants will implement the WebSphere Commerce Suite Blueprint Customization offering for <Customer Name>. BUSINESS PARTNER will allow <Customer Name> to launch a fully functional e-commerce web site quickly and affordably.

The WebSphere Commerce Suite Blueprint Customization Offering will be referred to throughout this document as Blueprint.

The Blueprint Asset is a service asset that is designed to function in conjunction with the following IBM products:

- BUSINESS PARTNER Websphere Commerce Suite (Including all the software in that bundle)
- MQ Series
- DB2 Net Search

The Blueprint Asset is also designed to work with the following ISV product:

- Taxware Sales/Use Tax

IBM'S WebSphere Commerce Suite (WCS) is BUSINESS PARTNER's commerce product. It provides the capabilities to create an electronic store, catalog and market products within the store, registering the users entering the store, the use of shopping carts and checkout facility with an interface to the payment software. WCS also provides administrative functions for the store.

MQ Series is an IBM middleware product that provides the base messaging functions for servers and clients. MQ Series assures once only message delivery and it can be used alone or with other members of the family.

DB2 Net Search is a powerful search tool that allows for searching the data using any of the following search methods: full text searching, keyword with Boolean, and wild card.

This SOW addresses the initial implementation of the Blueprint Solution. BUSINESS PARTNER may provide consulting services under a separate SOW to assist <Customer Name> to customize or further extend the functionality beyond the standard solution.

An overview of the Blueprint Solution features and functions is provided in Appendix D.

The securing of the software products is <Customer Name>'s responsibility, and the licensing, cost and support of such products are not within the scope of this SOW.

## 2.0 Project Scope

BUSINESS PARTNER, through the Consultants, will provide <Customer Name> with the following services, which shall be considered "Project Deliverables" for the purposes of this SOW.

The scope of the Blueprint Solution implementation for <Customer Name> includes installation and configuration of the WCS product, MQ Series, and DB2 Net Search products. It also includes the installation of the Blueprint Solution asset that has been customized with your corporate look and feel, populated with your catalog data, and your marketing initiatives.

In order to provide assurance that the solution meets the <Customer Name>'s needs, the first task of the project will be a review and validation of the scope of the solution. This requirement review will consist of a team made up of a Solution Architects, WCS Developers, and representatives from <Customer Name>. This review will include a walk-thru of the entire Blueprint asset, including the design points that allow for integration with your back-end system (via MQ series), and your catalog. In addition, the <Customer Name>'s IT environment is reviewed and a decision made with respect to the final Blueprint development and production environments.

The Blueprint Asset Description is the baseline of the functions that BUSINESS PARTNER is delivering. Any delta between the <Customer Name>'s requirements and Blueprint that is not already described in this SOW will need to be defined and documented via a Change Authorization in accordance with the change procedures outlined in this SOW.

Upon validating agreement of <Customer Name>'s requirements and the ability of the Blueprint Solution to meet those requirements, BUSINESS PARTNER will proceed with the implementation.

The scope of this proposal covers the requirements validation, the testing of the implementation, the installation at <Customer Name>'s site, and the training of personnel on the use of the system. The delivery of the Blueprint Service Asset will be considered complete when <Customer Name>, assisted by BUSINESS PARTNER, performs the System Verification Tests as outlined in Appendix C.

As further clarification of the scope, the following are not included in this SOW:

- Any programming required between your ERP system and MQ in order to get data into the required XML format
- Getting <Customer Name> catalog data in mass load format
- Extensions to the existing WCS schema
- Any modifications to the Blueprint offering site flow
- Any modifications to the look and feel of the JSPs beyond those identified in the JSP template.

Deviations that arise during the proposed project will be managed through the procedure described in Appendix B, "Change Authorizations."

BUSINESS PARTNER also will provide the <Customer Name> with the tangible items (Deliverables) identified below under "Deliverables", which shall be deemed "Materials" for the purposes of the Reference Agreement.

## **Deliverables:**

The following are Project Deliverables will be provided by BUSINESS PARTNER in performance of this SOW:

### **1. Requirements Validation Document**

**Purpose:** The purpose is to document the findings of joint BUSINESS PARTNER / <Customer Name> meetings on requirements.

**Content:** The document will consist of the following:

1. Colors and graphics
2. Data Model for catalog
3. Back-end integration (via MQ Series)
4. Marketing Initiatives
5. Payment Method
6. Search implementation

**Delivery:** BUSINESS PARTNER will deliver one soft copy of the document in MS Word format.

### **2. Bi-Weekly Status Report**

**Purpose:** BUSINESS PARTNER will provide a Bi-Weekly Status Report advising the <Customer Name> Project Manager of the progress and status of the BUSINESS PARTNER activities. The report will outline the BUSINESS PARTNER activities and describe the status of tasks worked on during that period. Significant accomplishments, milestones, and problems (if any) will be identified.

**Content:**

1. Activities performed during the reporting period
2. Activities planned for the next reporting period
3. Project change control summary
4. Problems, concerns, and recommendations
5. Other items of importance

**Delivery:** BUSINESS PARTNER will deliver one soft copy of the document in MS Word format.

### **3. Blueprint Service Asset**

**Purpose:** The software or application code with the <Customer Name>'s customization that makes up the Blueprint Solution.

**Content:**

1. Home page and overall site navigation
2. Registration / Login / Logoff
3. Address book with ability to store multiple shipping locations
4. E-mail Password Reset
5. Product and category display pages
6. Catalog Search
7. Shopping cart
8. Multiple Named Wish Lists
9. Checkout facility with Interface to Payment Manager for payment processing
10. Integration with Taxware for tax calculation
11. E-mail order notification
12. Order Status / History
13. Customized of JSP to replace existing Blueprint graphics and logos with <Customer Name>'s
14. Mass load of catalog data (up to 10,000 products)

15. Marketing initiatives (up to 5)
16. Integration with MQ series via XML for both WCS inbound and WCS outbound messages with your ERP system

**Delivery:** BUSINESS PARTNER will install the Blueprint Service Asset in the <Customer Name>'s production environment.

#### **4. Blueprint System Administrators Document**

**Purpose:** The purpose is to document relevant information about the Blueprint asset.

**Content:** The document will consist of the following:

1. Overall System Architecture Chart
2. Information on starting and stopping the components of Blueprint
3. Information on populating the catalog via mass load
4. Locating Key Log files for Problem Determination
5. Description of Key Configuration Files
6. Application Maintenance Information
7. References to Standard Product Materials

**Delivery:** BUSINESS PARTNER will deliver one soft copy of the document in MS Word format.

## 3.0 Key Assumptions

The Scope of Work and the estimated hours to perform the tasks described in Sections 2 and 4 are based on the following key assumptions.

### **General Technical Assumptions**

- <Customer Name>'s Personnel to be trained to meet the minimum training levels as specified in *Appendix A – Training Requirements*.
  - ✍ The navigation paradigm, design layout and JSP pages of Blueprint will be used as is. Customization will be made only to adapt color changes and replace graphics and logos received from <Customer Name> in the pre-defined way.
  - ✍ <Customer Name> will provide all workstation and server operating system installation and configuration prior to BUSINESS PARTNER installation services.
  - ✍ All code, documentation, deliverables, and training under this SOW will be provided in English. The Blueprint offering will support multiple languages. The <Customer Name> is responsible for translating content into non-English languages.
  - ✍ Administrative functions available to work with Blueprint are those standard functions provided by WCS.
  - ✍ Blueprint uses WCS standard login/authentication process. If the <Customer Name> has its own user registration and login/authentication, this SOW does not cover the merging of Blueprint with that custom authentication. Integration with LDAP or single sign-on is not considered to be part of the Blueprint offering.
  - ✍ Payment for products purchased on the <Customer Name> e-commerce site will be one of the supported Payment Manager methods. Custom cassettes or Non-Payment Manager methods are not covered in this SOW.
  - ✍ This SOW does not include network design, firewall design and the establishment of a link between any existing <Customer Name> web site and the Blueprint offering.

### **General Project Related Assumptions**

- ✍ The price used for the implementation of the <Customer Name> Blueprint is based on BUSINESS PARTNER's estimate of making customization changes to the baseline functions as described in the Blueprint Asset Description. It is assumed that <Customer Name>'s requirements can be fulfilled using Blueprint with no changes to the base code of the offering, other than those described in section 4 of this Statement of Work. BUSINESS PARTNER reserves the right to change the pricing and scope of this Statement of Work if this assumption is not correct.
- ✍ The implementation and integration testing tasks generally will be performed at the BUSINESS PARTNER Toronto Lab. Installation, testing and user training will be done at the <Customer Name>'s designated premises.
- ✍ The <Customer Name> Project Manager will schedule and ensure participation of all <Customer Name> Subject Matter Experts and technical personnel for all required interviews and works sessions.
- ✍ The BUSINESS PARTNER team will not be responsible for the quality of the data in data files or databases.
- ✍ All tasks outlined will be performed over a consecutive time frame unless otherwise agreed upon by the <Customer Name> Project Manager and the BUSINESS PARTNER Project Manager.
- ✍ BUSINESS PARTNER will provide services during normal business hours, 9:00 am to 5:00 p.m. EST Monday through Friday, except holidays.

✍ As required, standard IBM and non-IBM products as needed by the WCS and Blueprint solution, and any fixes to them, will be procured by <Customer Name> under standard IBM or vendor purchase and license terms.

✍ This SOW addresses the initial implementation of the Blueprint Solution. BUSINESS PARTNER may provide consulting services under a separate SOW to assist <Customer Name> to perform activities outside this SOW.

#### ***Hardware and Software Related Assumptions***

✍ The Blueprint Solution will be implemented on a hardware platform supported by the WCS product.

✍ This Statement of Work was priced assuming that the Blueprint Solution is implemented on two environments at the <Customer Name>'s location. The first environment is a single-tier NT development machine. The second environment is a 2-tier production environment that can be any of the supported WCS platforms. Installation and configuration of servers in addition to those described are not considered to be part of this SOW.

✍ The computing environment for testing will be available at least 3 days prior to the start of any activity that requires the environment.

✍ Services for Web Hosting are not included under this SOW.

✍ <Customer Name> has a network, or will provision a network, capable of handling the anticipated workload. The <Customer Name> will assign Network IP addresses for the system components and users.

✍ Performance is influenced by many factors, not all of which are under BUSINESS PARTNER's control (e.g., network loading, host performance, etc.) BUSINESS PARTNER will tune the Blueprint solution for performance, however, BUSINESS PARTNER makes no guarantees, either expressed or implied, concerning the performance to be achieved.

✍ All software supported by WCS will be supported by the Blueprint solution.

✍ The Blueprint Service Asset will be tested using Netscape 4.5, AOL 4.0 and Internet Explorer 4.0, 5.0 on a Windows-based personal computer.

## 4.0 BUSINESS PARTNER's Responsibilities

The general BUSINESS PARTNER project responsibilities for the Installation and customization of the BUSINESS PARTNER Blueprint Service Asset are discussed in this section.

### 4.1 Project Direction

**Description:**

Provide technical direction and control of the BUSINESS PARTNER project personnel and provide a framework for project planning, communications, reporting, procedural, and contractual activity. The BUSINESS PARTNER Project Manager will perform the following tasks:

- Review the contractual responsibilities of both parties with the <Customer Name> Project Manager.
- Maintain project communications through the <Customer Name> Project Manager.
- Measure and evaluate progress against the project plan with the <Customer Name> Project Manager.
- Resolve any deviation from the project plan that may be caused by BUSINESS PARTNER.
- Review project tasks, schedules, and resources and make changes or additions, as appropriate.
- Conduct regularly scheduled project status meetings.
- Prepare bi-weekly Project Status Reports.
- Administer the Project Change Control Procedure with the <Customer Name> Project Manager.
- Coordinate and manage the technical activities of project personnel.

### 4.2 Requirements Validation

**Description:**

The objective of this task is to confirm the fit of Blueprint to <Customer Name>'s requirements and document adjustments. The subtasks are as follows:

- Meet with the appropriate representatives from the <Customer Name> to review and finalize the proposed scope of implementing Blueprint.
- Review <Customer Name>'s catalog requirements and model data using WCS data
- Review <Customer Name>'s catalog search requirements
- Review <Customer Name>'s proposed modifications to the colors, logos and graphics for Blueprint, using the JSP template available as part of the overall Blueprint Asset.
- Review <Customer Name>'s marketing initiatives
- Review <Customer Name>'s Payment Manager method (one of: offline, SET, or cybercash)
- Review and validate that the <Customer Name>'s back-end messaging requirements are met by the standard WCS messages
- Create a Requirements Validation Document describing the customization required and any deltas between the functions currently in Blueprint and <Customer Name>'s requirements and forward it to the <Customer Name> Project Manager for review and signoff.
- Review the document with the <Customer Name> Project Manager. Validate and confirm the scope. This review will be completed before the remaining development tasks will begin.
- Create Project Change Requests for any requirements that are beyond the standard customization of Blueprint.

**Completion:** This task will be complete when the Requirements Validation Document has been reviewed and signed off by both <Customer Name> and BUSINESS PARTNER.



## 4.3 Software Customization/Development

### 4.3.1 Modeling <Customer Name>'s Catalog Data

**Description:**

The objective of this task is to model the <Customer Name>'s data using the existing WCS schema and understand how the various <Customer Name> products and specific items will be presented on the category and product display pages.

**Assumptions:**

1. Reuse of existing fields within the WCS data model is limited to data that meets the specifications imposed by the WCS data model. The data model will be discussed during the requirements review session between BUSINESS PARTNER and <Customer Name>.
2. <Customer Name> will provide data in the defined mass load format.
3. <Customer Name> will provide 20 items with complete mass load information prior to the start of the build cycle.
4. <Customer Name> will provide complete catalog data prior to the start of the integration test cycle.
5. Extensions to the existing WCS data model are not included in the scope of this SOW.

**Completion:** This task will be complete when the agreed upon data requirements are understood and represented by the existing WCS schema. The data model will be captured as part of the Requirements Validation Document.

### 4.3.2 Customize Search Interface to <Customer Name>'s Content

**Description:**

The objective of this task is to customize the Blueprint Interface for searching and retrieving <Customer Name> content. The effort will customize the search and retrieve interfaces to the data model of the <Customer Name> catalog. This activity includes the design, coding, and unit testing of these functional component customizations. The functional components are:

- Search and Retrieve catalog items

**Completion:** This task will be complete when the agreed upon changes for Blueprint Search as documented in the Requirements Validation Document have been implemented.

### 4.3.3 Modify the Blueprint Colors, Graphics and Logos to <Customer Name> Requirements

**Description:**

The objective of this task is to modify the existing colors and replace existing graphics and logos used by the Blueprint Service Asset to conform to <Customer Name>'s Requirements. These requirements will be decided upon by <Customer Name> during the Requirements Review task. The following subtasks will be performed:

- ✍ Make the changes on up to 5 of the Blueprint JSPs and submit to the <Customer Name> Project Manager for signoff. <Customer Name> will sign off within 2 business days
- ✍ Complete the changes for the remaining JSPs
- ✍ Review the first round of changed Blueprint screens with the <Customer Name> Project Manager and reach agreement on additional changes required for the screens.

- ✍ Make any final changes required based on the review with the <Customer Name> Project Manager.
- ✍ Submit final changed screens to the <Customer Name> Project Manager
- ✍ Obtain final signoff of the <Customer Name> Project Manager with 2 business days of submitting the final changes for his review.

**Assumption:** After signoff that the final changes reflect those established in the Requirements Validation Document, <Customer Name> will be responsible for making any additional color changes or graphical changes to the Blueprint JSPs.

**Completion:** This task will be complete when the agreed upon changes for Blueprint colors, graphics and logos as documented in the Validation Document have been implemented.

#### 4.3.4 Load Sample Data for Testing

**Description:**

The objective of this task is to load the 20 sample items, with complete information (e.g. thumbnails, full-size images, short and long descriptions). This sample data will be delivered to BUSINESS PARTNER prior to the pre-installation testing.

**Completion:** This task will be complete when the sample data has been loaded into the development environment.

#### 4.3.5 Implement the Payment Manager Method

**Description:**

The objective of this task is to enable to the Payment Manager payment method that <Customer Name> has chosen.

**Completion:** This task will be complete when the payment method is working as defined in the Requirements Validation Document.

### 4.4 Installation & Configuration

**Description:**

Create two environments at the <Customer Name>'s location. One environment will be a single tier installation used for development and/or testing. The second environment will be the two-tier production environment. In both environments BUSINESS PARTNER consultants will install and configure the necessary software components. A development/test environment at an BUSINESS PARTNER location may be established in addition to the environments created at the <Customer Name>'s location.

The Blueprint environment will contain the following software components:

- Install and configure the WebSphere Commerce Suite package, including:
  - WebSphere Application Server
  - DB2 (if Oracle is to be used, the customer is responsible for installation)
  - HTTP Server (if another web server is to be used, the customer is responsible for installation)
  - WebSphere Commerce Suite
  - Payment Manager
- MQ series
- DB2 Net Search (If DB2 is the WCS Database)

- Test system
- Install Blueprint Service Asset

**Assumption:**The <Customer Name> is responsible for installing the Taxware product and obtaining the necessary integration code from Taxware.

**Completion:** This task will be complete when the above listed software is installed on <Customer Name>'s system.

#### 4.4.1 Load Production Data

**Description:**

The objective of this task is to load the production data into the WCS schema. The catalog will be populated with up to 10,000 items. Note that an item is a fully resolved SKU or part number.

**Assumption:**The <Customer Name> is responsible for providing the production data in WCS mass load format.

**Completion:** This task will be complete when the production data has been loaded into the production environment.

### 4.5 Integration Testing

**Description:**

At the development and test site, perform Integration Testing on the <Customer Name> System. This testing will be based on the Blueprint test cases outlined in Appendix C.

**Completion:** This task will be complete when the integration tests as outlined in Appendix C are completed successfully.

### 4.6 Customer Acceptance Testing Support

**Description:**

At the <Customer Name> facility, assist the <Customer Name> team with the execution of the tests as outlined in Appendix C. This Testing support will be limited to one person on site for a maximum of two weeks (two weeks being 2 separate weeks of five consecutive eight hour work days).

**Completion:** This task shall be considered complete when <Customer Name> has completed these tests to their reasonable satisfaction, or at the end of the two weeks of test support by BUSINESS PARTNER, whichever occurs first.

### 4.7 Documentation Development

**Description:**

The objective of this task is to develop a Blueprint Administrators Document to reflect the operational considerations of the Blueprint software for the <Customer Name> System Administrator. This document is assumed to be no longer than 10 pages.

**Completion:** This task will be complete when the Blueprint System Administrators Document as described in the deliverables section of this SOW is delivered to <Customer Name>.

## 4.8 Customer Training

**Description:**

The objective of this task is to conduct three one-day education sessions at the <Customer Name> facility for <Customer Name> personnel. One day for the Customer Service Representative (CSR), one day for the Business Manager, and one day for the application Administrator.

The CSR training will include training on the CSR functionality that is available via the Commerce Accelerator tool. The Business Manager training will include information on how to update the marketing initiatives and collect information about customer's reaction to those initiatives. The Application Administrator training will take the Administrator through the information in the Blueprint Administrators' Document, educating the administrator on how to start and stop the necessary software processes, examine the application trace information and run cleanup utilities.

The training will be conducted during normal business hours and will not exceed 7 hours per education session.

**Assumption:** Training will be conducted at the <Customer Name> facility.

**Completion:** This task will be complete when BUSINESS PARTNER has conducted the three one-day training sessions with <Customer Name> personnel.

## 5.0 <Customer Name> Responsibilities

The responsibilities listed in this section are to be provided at no charge to BUSINESS PARTNER.

### 5.1 Project Management

Prior to the start of this Phase, the <Customer Name> will designate a person, called the <Customer Name> Project Manager, to whom all BUSINESS PARTNER communications will be addressed and who has the authority to act for <Customer Name> in all aspects of the contract.

***The responsibilities of the <Customer Name> Project Manager include:***

- Overall Project Management
- Serve as the primary interface between the BUSINESS PARTNER project team and <Customer Name>'s management and other personnel involved in this project.
- Review the contractual responsibilities of both parties with the BUSINESS PARTNER Project Manager at the outset of the project.
- Review project progress with the BUSINESS PARTNER Project Manager during the biweekly status meetings.
- Resolve deviations from project plans that may be caused by <Customer Name>.
- With the BUSINESS PARTNER Project Manager, administer Change Authorizations
- Serve as the recipient of all BUSINESS PARTNER Project Team deliverables on behalf of <Customer Name>.
- Obtain and provide information, data, decisions and approvals, within three working days of BUSINESS PARTNER's request, unless <Customer Name> and BUSINESS PARTNER agree to an extended response time.
- Help resolve project issues and escalate issues within the <Customer Name> organization, as necessary.
- Designate, schedule, and make available <Customer Name> personnel as required to meet the project plan.
- Provide access to all necessary administration facilities including but not limited to installation configurations and environmental settings for hardware, network, communications, and any software products that pertain to the work effort specified herein.
- Provide any pertinent <Customer Name> standards and guidelines used to administer and/or configure equipment and software.
- Make commitments for <Customer Name>.

### 5.2 Provide a System Administrator

It is <Customer Name>'s responsibility to designate a Systems Administrator. This person is responsible for the system administration of the WCS and Blueprint software. In addition they are responsible for hardware and software installation, planning and monitoring usage of the system, problem determination as well as day-to-day operations. The training required to fulfill this position is documented in Appendix A.

### 5.3 Provide a Network Administrator

Prior to commencement of service under this Statement of Work, it is the <Customer Name>'s responsibility to designate a Network Administrator. It is imperative that this Network Administrator be extremely knowledgeable and skilled with <Customer Name>'s network topology, router configurations, protocol support, proxy configuration (if any), firewall configurations (if any), and DNS configuration. It is highly likely that some network, or proxy, or router, or firewall modifications will be necessary in order to implement Blueprint.

## 5.4 Assist with Validating Requirements

*<Customer Name> is responsible for.*

- Participating in meetings with BUSINESS PARTNER to validate <Customer Name> requirements and to ensure those are within the scope of Blueprint.
- Jointly with BUSINESS PARTNER validate the scope of the solution.
- Provide <Customer Name>'s catalog requirements
- Provide <Customer Name>'s requirements for searching <Customer Name> catalog content.
- Provide <Customer Name>'s proposed modifications to the colors, logos and graphics for Blueprint
- Provide <Customer Names>'s payment method

Review and approve the Requirements Validation document provided by BUSINESS PARTNER

## 5.5 <Customer Name> Data

- <Customer Name> will provide 20 items with complete product data (including thumbnails and other images) that are representative of <Customer Name>'s content, that will be loaded by BUSINESS PARTNER and used during pre-installation testing of the Blueprint components.
- <Customer Name> will provide production-level data (not more than 10,000 items) prior to the start of integration testing
- <Customer Name> is responsible for the actual content of all data files and is responsible for implementing controls for its access, use, and security.
- <Customer Name> is responsible for backup and recovery of the test and production system.

## 5.6 Required Equipment

<Customer Name> will provide a network and environment infrastructure that is capable of supporting the BUSINESS PARTNER proposed solution. <Customer Name> is responsible for obtaining all software and hardware specified in Appendices C and D. This equipment will be available to BUSINESS PARTNER two weeks after the signing of this Statement of Work. Start of BUSINESS PARTNER's customization and modification to the Blueprint Service Asset is contingent upon this environment's availability.

## 5.7 <Customer Name> Hosting

It is understood that <Customer Name> will provide a hosting site for the Blueprint application, hardware and associated software. <Customer Name> is responsible for the relationship with and management of this hosting facility.

## 5.8 Completion of Customization / Development Tasks

<Customer Name> will provide the following functions:

- Creation and/or modification of graphics or logos in order to conform to the requirements defined in the JSP template.
- Any programming or translation required to get data from the XML MQ format into a format that can be understood by your ERP system. This applies to both inbound and outbound messages to your ERP system.
- Conversion of existing catalog data into the WCS mass load XML format

## **5.9 Completion of Pre-Installation Tasks**

<Customer Name> will ensure that all prerequisite tasks are complete at the <Customer Name> installation site (hosting site) prior to BUSINESS PARTNER's installation and configuration of Blueprint. This will include:

- Required Hardware Installed
- Required Software available
- Training Completed
- Network available

## **5.10 Payment Method Link**

<Customer Name> is responsible for establishing the link between Payment Manager and the accounting financial or banking institution.

## **5.11 <Customer Name> Testing**

<Customer Name> will complete testing of Blueprint per the test cases outlined in Appendix C. <Customer Name> will complete their testing and report any variances to BUSINESS PARTNER for assistance, analysis and resolution if needed. This testing will take place with BUSINESS PARTNER's assistance as described in task 3.7, Customer Testing Support.

## **5.12 Provide Applicable Rights and Licenses**

To be provided by the Business Partners.

## 6.0 Schedule

The Project Deliverables will be provided at <Customer Name> between Aug , XX 2001 and Oct XX, 2001 (End Date), or on other dates mutually agreed to between You and BUSINESS PARTNER.

## 7.0 Charges

BUSINESS PARTNER's charges for this engagement will be \$XXXX plus travel and living expenses and applicable taxes.

Activity	Sr WCS Consultant	Sr. Data Modeling Consultant	WCS Consultant	Jr WCS Consultant	Total Hours
Project Management	160				160
Solution Outline	100	20			120
Macro Design	76	24			100
Micro Design	148	16			164
Build Cycle		40	350	310	700
Deployment			40	24	64
Training			8	24	32
Additional Eng Mgt	40				40
Additional for Risk	120				120
Total	644	100	398	358	1500

## 8.0 Completion Criteria

BUSINESS PARTNER's obligations under this SOW shall end 1) when BUSINESS PARTNER has provided the Project Deliverables, specified above; 2) upon the End Date; or 3) when the <Customer Name> terminates this SOW, whichever event occurs first.

In the event that You elect to terminate this SOW, You agree to give BUSINESS PARTNER three days written notice of Your intentions. In the event of a termination, You agree to pay BUSINESS PARTNER for any Project Deliverables provided and reasonable expenses incurred through the termination date. Should You desire, this project may be extended by mutual agreement of both parties in writing. Upon the conclusion or termination of this project, BUSINESS PARTNER shall not be responsible for updating,



maintaining or supporting any Project Support Services or Deliverables provided under this SOW. BUSINESS PARTNER will not be responsible for project management or for any results achieved. Additional technical support may be provided to You under a separate contract.

## 9.0 General Terms and Conditions

To be provided by the Business Partner.

This offer will expire on Aug XX, 2001.

## Contact Information

**BUSINESS PARTNER Technical Coordinator:**  
Mr Business Partner  
BUSINESS PARTNER Corporation

**<Customer Name> Technical Coordinator:**

Phone:  
Facsimile:

**BUSINESS PARTNER Contracts Coordinator:**

BUSINESS PARTNER Corporation

Phone:  
Facsimile:

## Appendix A – Training Requirements

In order to ensure that <Customer Name> has the prerequisite skills for maintaining this WCS solution, the following minimum knowledge level or training courses are required:

### A.1. Blueprint- Systems Administrator

The <Customer Name> systems administrator must complete the following training or have equivalent practical experience:

- WebSphere Commerce Suite Overview (Course WA01A)
- Systems Administration for WebSphere Commerce Suite (Course WA20A)
- WebSphere Commerce Suite Accelerator (Course WA410)
- WebSphere Application Server V3.5 Administration (CourseAD69A)

For more information about how to register for these IBM-supplied courses, please refer to the following url: <http://www-3.ibm.com/services/learning/us/>. Specific course number can be entered directly into the search field to obtain the relevant course specifics.

The <Customer Name> systems administrator must have a working knowledge of the following systems:

- Target OS for the Blueprint solution (Windows NT, Windows2000, AIX, Sun)
- TCP/IP
- Understanding of relational database
- Networking skills, experience in configuring Web servers.

These training courses are not included as part of this SOW. It is assumed that <Customer Name> will take any required training at their expense.

## Appendix B - Change Authorizations

Changes to Services during this engagement, including addition and deletion of Services, will be submitted in a Change Authorization. The Change Authorization will describe the change, the rationale for the change, and the effect the change will have on the engagement.

The designated Project Manager of the requesting party must authorize the request before submission to the other party. The receiving party may either accept the Change Authorization for implementation or further investigation, or reject it. Before we start our investigation, we will inform <Customer Name> of any additional charges to investigate a Change Authorization that <Customer Name> authorizes. If

## Appendix C - Blueprint Test Cases

This appendix provides Blueprint's system test cases. The test cases have been designed to cover both normal and exception paths for all Blueprint features, and real-life test scenarios across modules and functions.

### Registration - Test Cases

1. Verify that a user can access the conditions and policies on the home page
  2. Verify that a new user can access the Register page
  3. Verify that a new user can register
  4. Verify that a user cannot successfully register when information in a required field is missing
  5. Verify that a user cannot successfully register when the value in the "Verify Password" field does not match the value in the "Password" field
  6. Verify that a user cannot successfully register when the user name entered is already in use
  7. Verify that a user cannot successfully register if non-alphanumeric characters have been entered in the user name field
  8. Verify that a user cannot successfully register if non-alphanumeric characters have been entered in the password field
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### Password Reset - Test Cases

1. Verify that a user can successfully obtain a new password via email
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### Login/Logoff - Test Cases

2. Verify that a user can successfully log into her account
  3. Verify that a user can obtain her forgotten user name and/or password by using the "Forgot Username/Password?" option
  4. Verify that the system does not allow a user to log in if she enters an incorrect user name and/or password
  5. Verify that a user can not return to a book-marked page without logging in (if "Save Login Info" is not checked)
  6. Verify that a user can logoff successfully.
  7. Verify that once logged off, a user cannot access the account information.
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### Search - Test Cases

1. Verify that a user can successfully search and retrieve items by entering keyword
  2. Verify that a user can successfully search and retrieve items by entering a fuzzy search (e.g. spelling error in keyword description)
  3. Verify that a user can successfully search and retrieve items by entering a partial work search (e.g. lap for laptop)
  4. Verify that an unsuccessful search (no such keyword) returns an appropriate error message.
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### Catalog - Test Cases

1. Verify that product categories are displayed.

2. Verify that product sub-categories are displayed.
  3. Verify that items are displayed.
  4. Verify that a discount can be created.
  5. Verify that the correct discount is applied to the price of the item.
  6. Verify that a marketing initiative can be created and displayed on the catalog pages.
  7. Verify the campaigns are displayed correctly and that the item can be navigated to and added to shopping cart.
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## **Wish List - Test Cases**

8. Verify that items can be added to a wish list from the item display page
  9. Verify that guest members cannot create wish lists.
  10. Verify that a user can name a wish list.
  11. Verify that a user can have multiple named wishlists.
  12. Verify that a user can navigate to a wish list from the My Account home page.
  13. Verify that items in a wish list can be copied to a shopping cart.
  14. Verify that items can be removed from the wish list
  15. Verify that wish lists are persistent across sessions. Logout and return and view wish list.
  16. Verify that a wish list can be emailed.
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## **Shopping Cart - Test Cases**

1. Verify that a user can view her shopping cart.
2. Verify that a user can remove items from the shopping cart.
3. Verify that a user can update the quantity field in the shopping cart.
4. Verify that the user can initiate the checkout process from the shopping cart.

## **My Account - Test Cases**

1. Verify that all the navigation works from the my account home page (order status, wish list, etc.)
2. Verify that a buyer can modify her personal information (update street, change password, update demographics). Logout of the site and return to verify changes are reflected.
3. Verify that all mandatory information must be provided when updating personal information
4. Verify that the e-mail address must be unique for each account.
5. Verify that a guest member cannot access any 'my account'.

## **Order Status - Test Cases**

1. Verify that order status can be navigated to from the navigation bars (top & bottom) and from the My Account home page.
2. Verify that the order status is displayed correctly
3. Verify that the multiple orders can be displayed. Selecting an order number will launch an order detail page.
4. Verify that a user can display an order in all of the following order status: Pending, Shipped, Complete.
5. Verify that both a guest and a registered user can obtain order status.
6. Verify that order status email is sent upon receipt of your order.

## **Checkout - Test Cases**

1. Verify that a user can checkout from the shopping cart
2. Verify that the Select Billing Address page is presented and that all the billing addresses the user are presented

3. Verify that the user can add a billing address from the Select Billing Address page
4. Verify that the Select Shipping Address page is presented and that a user can choose to enter a different shipping address for each item in the shopping cart
5. Verify that the Select Shipping Method page is presented and that the user can select 1 of the 3 methods.
6. Verify that the Order Summary page is presented with the correct order calculation. The total reflects the items selected, the shipping charges and the tax calculation for the order.
7. Verify that the user can enter a credit card and submit the order.
8. Verify that an invalid credit card or expiry date returns an error message and that the order is not processed.

### **Quick Checkout - Test Cases**

1. Verify that a user can create a quick checkout profile
2. Verify that that a user can use quick checkout from the shopping cart page. User should go directly to the Order Summary
3. Verify that error messages are displayed if credit card information is incomplete or incorrect.

### **General - Test Cases**

1. Verify that all URL links are correct from the home page are correct (e.g., Home, Contact Us, Help, Privacy Policy)
2. Verify that error messages are displayed correctly
3. Verify that colors and other "look and feel" items are correct and consistent.

## **Appendix D - Blueprint Features**

### **Campaign Support**

Blueprint is setup to support campaigns, and there are several predefined E-Marketing spots located in the store, namely on the Store Home Page, and category display pages. A default campaign is set up in the Commerce Accelerator. The campaign just needs to be published to be active. Since Blueprint is already set up for campaigns, creating your own marketing scenario is easy to do.

### **Discount Support**

Blueprint is setup to support discounting. There is a sample discount that can be created by following tutorial steps in the Blueprint Perform Guide. This is a sample discount, but it can get you started on the road to creating more complex discounts for your customers.

### **Quick Checkout**

Blueprint's registration process allows the shopper to set up an express checkout template, which consists of default shipping and billing information, as well as default credit card information. When the shopper is browsing, they can choose to go right to the Order Completion screen using their default information. This allows for a quick and easy shopping experience.

### **Email Notification**

Blueprint provides the templates that can be used to send email to customers after a completed order. Given that a valid email address is provided during registration, an email will be sent to shoppers who have just submitted their orders.

### **Order Status**

Blueprint allows registered shoppers to check their order status at any time. Once registered, the Order Status links will provide the user with a list of all their orders and their associated states. The user may click on any order to view the Order Details, such as tax and shipping charges, product information, etc.

### **Net Search Integration**

Net Search is an IBM product which can be integrated with the Blueprint service offering. It is provided in Blueprint for demo purposes. To fully utilize Net Search's functionality additional implementation work may be required.

### **Registration Updates**

The Blueprint store makes some minor modifications to the registration process. The changes allow customers to provide some additional information and demographics, which can be used in various marketing campaigns for creating recommendations. Customers can also update information at any point in their session.

### **Item Level Shipping**

Blueprint provides the capability for an order to have multiple shipping addresses. The shopper can specify different shipping addresses for the various items in his/her shopping cart. Normally, all the items in an order are shipped to the same address, but in this case, they are shipped to separate locations. The items remain under the same order number for tracking purposes.

### **Multiple Wish List**

The Blueprint store implements the wish list concept, which allows registered users to create a wish list that contains items that they would like to buy or receive, but they are not in the shopping cart or in an order. Blueprint also takes this concept one step further by allowing the user to maintain multiple wish lists, perhaps a different list for different occasions, or for different people. Blueprint also provides the

functionality for emailing your wish list to one or more of your friends and family. The email contains a link to the wish list, so that the email recipients can view the wish list and perhaps buy the items for the user in question. Indirectly, this also generates more user volume on your store, and could result in more orders and/or registered users.

### **Password Reset**

A shopper needs to have the ability to reset their password if it is forgotten. Blueprint has implemented a page off of the logon page to accomplish this function. In order to reset the password, the customer needs to have specified a challenge question and answer during the registration process. The challenge question and answer are displayed to the shopper when they are attempting to reset. A correct answer will result in the password being sent to the shopper via email.

### **Item Display**

The Blueprint store will contain Product Display pages and Item Display pages. The Product Display page contains a product image, and drop down lists for attributes. You can select the attributes that you want, and then click add to shopping cart, or add to the wish list. The shopping cart and wish list contains a link that you can use to modify the product you have added. This link will go to an Item Display, which shows the selected attributes for verification purposes.

### **Logoff**

This feature allows a user to sign out of the current session. A new session is created, and the user is then treated as a guest shopper. This feature allows the user to possibly change to a different user id without closing the browser, and it is useful for security reasons.

### **Check Order Status as Guest Shopper**

Guest shoppers may place orders without registering, as per a feature of WCS. Even though they are not registered users, they may wish to still be able to check their order status, to see if the order has been shipped, cancelled, etc. Upon completion of a guest order, the guest shopper is assigned a password, which they may use in combination with the order number, to retrieve their order status at a later date. This feature will be available from the Order Status link of the store.

### **Multiple Language Support**

The WCS store supports multiple languages, and the shopper may switch languages at any time using the drop down menu. Switching languages will take the user back to the Store Home Page. Only the supported languages are displayed in the drop down, and the associated properties files must be translated in order for the full effect to be achieved. At this time, the store will function with both languages, but will only display one currency to the user. Depending on the language that the user is shopping in, the currency format will change. The date format of the store will always be yyyy-mm-dd, regardless of the language being used.

### **Integration with MQ Series**

MQ messages can be created for the various function of the WCS store, such as Order Confirmation, Change of Status, Registration, etc. Inbound and Outbound messages are supported, as per the MQ configuration guide. Some default messages are provided, and the user may create their own.

The MQ Series Adapter supports inbound messages that accomplish the following functions:

1. Create a customer registration
2. Update a customer registration
3. Update the status of an order
4. Update the inventory for a product



5. Update the price of a product

The MQ Series Adapter supports an outbound message that accomplishes the following function:

1. Place a WCS Order

### **Integration with Taxware**

Taxware is third party software which calculates sales tax based on different regions of the world. Using the Taxware software will eliminate the need to set up complex tax rules in your store, because the calculations are handled by Taxware software.

WCS interacts with Taxware via the *Tax Integration Interface* and *Taxware Integration Feature*. There are two points within the shopping flow where the Tax Integration Interface is invoked: the OrderPrepare and OrderProcess commands. The former is invoked when a customer adds one or more items into the shopping cart and views the shopping cart page; the latter is invoked when customers submits the items for purchase. (See Taxware Integration Interface Kit Administration Guide for task commands that are used by Integration Interface.) Whenever the Integration Interface is invoked, Taxware calculates the correct amount of tax, and stores the results in the Orders and OrderItems tables. The results are used on the Order Summary page which displays the calculated tax rates.

Taxware Integration Feature is an interface that is used to receive tax-related data from the Tax Integration Interface and convert it to a format recognizable by the Taxware application. In short, the Integration Feature does the actual conversion and sends it to the Integration Interface. WCS interacts with the Integration Interface to store/display the correct tax rates.