



IBM Customer ***IBM Content Collector for
Email Install & Mentor Package
Service Description***

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Table of Contents

- 1. DESCRIPTION OF SERVICES 1
- 2. REQUIRED PRODUCT TRAINING 2
- 3. RESOURCES 3
 - 3.1 ECM TEAM RESOURCES 3
 - 3.2 <IBM CUST> TEAM RESOURCES 3
- 4. ROLE DEFINITIONS 3
- 5. RESPONSIBILITIES 4
 - 5.1 <IBM CUST> RESPONSIBILITIES 4
 - 5.2 IBM RESPONSIBILITIES 5
- 6. ASSUMPTIONS & LIMITATIONS 6
 - 6.1 ASSUMPTIONS 6
 - 6.2 SERVICE LIMITATIONS 6
 - 6.2.1 Travel & Living Expenses 6
- 7. PROJECT TASKS & DELIVERABLES 7
 - 7.1 TASK 1: KICKOFF MEETING 7
 - 7.1.1 Review Project Services Description 7
 - 7.1.2 Define/Review Project Plan 7
 - 7.1.3 Project Status 7
 - 7.2 TASK 2: PLATFORM/ARCHITECTURE CONFIGURATION DOCUMENT & REVIEW 7
 - 7.3 TASK 3: SOFTWARE INSTALLATION 8
 - 7.4 TASK 4: ICC CONFIGURATION REVIEW 8
 - 7.5 TASK 5: SAMPLE CONFIGURATION FOR MENTORING 8
 - 7.6 TASK 6: TEST 9
 - 7.7 TASK 7: SYSTEM ADMINISTRATION HANDOFF 9
 - 7.7.1 Transfer of Information 9
 - 7.7.2 Routine Maintenance 9
 - 7.7.3 Review Backup Methodologies 9
 - 7.7.4 Problem Reporting 9
 - 7.8 TASK 8: DEMONSTRATE SYSTEM TO <IBM CUST> PROJECT TEAM 10
 - 7.9 TASK 9: PROJECT COMPLETION 10

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1. Description of Services

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

- IBM Content Collector for Email Install & Mentor Package (“ICC for Email”)

This service provides the expert resources to install ICC for Email software at your site integrating with IBM FileNet P8 Content Manager (“P8 CM”) or IBM Content Manager 8 (“CM8”). It also provides hands-on assistance and mentoring to address questions and key issues regarding the installation and configuration of the software.

The ECM Consultant will help guide <IBM Cust> on strategies and procedures that have been employed by other successful ECM installations. The completed installation also ensures that the software is supportable by IBM Product Support.

The scope of this Install Package is limited to the installation and support of ICC for Email¹ in one (1) environment including the following activities:

- Review requirements and configuration options
- Review <IBM Cust>’s platform/architecture environment
 - P8 CM or CM8
 - Lotus Notes or MS Exchange
- Install ICC for Email
 - ICC User-exit (CM8 environments only)
 - ICC for Email software
 - ICC Client for Email Platform
 - ICC Outlook Extension (for Microsoft Outlook Mail environments only)
 - ICC OWA Support (Outlook Web Access environments only)
 - ICC Lotus Notes Client Template Enablement (Domino Environments only)
- ICC Configuration Review
 - Data-store
 - Connector
 - Metadata & List
 - Task-route
 - Email service
 - Notes Template enablement
 - Outlook Extensions
- Configure Sample Configuration for Mentoring
 - Configure up to five (5) sample Task Routes
 - Include Interactive collector in task route definition
 - Include archiving task route with no immediate stubbing

¹ The ICC for Email includes the installation of one (1) ICC primary server and one (1) secondary server.

- Include one (1) life cycle sub task route
- System Administration Handoff
- Demonstrate the System to the <IBM Cust> Project Team
- Deliver project management and coordination

This Package includes a set of tasks that <IBM Cust> must complete to facilitate a successful product installation and rollout. The duration of each task varies from customer to customer based on their knowledge of the IBM products and the complexity of the anticipated environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel necessary to successfully install and configure the ICC for Email software.

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 successfully complete (or have successfully completed) the following IBM training. The IBM education required for this installation is as follows:

If P8:

- Course Code: F002 – P8 Platform Administration

If CM8:

- Course Code: IM401 - IBM DB2 Content Manager V8 Implementation and Administration

Please note that IBM may offer an equivalent Instructor Led Online (“ILO”) or self paced eLab course. Any of these courses will satisfy this installation package training requirement.

The cost for these training courses is not included in this ICC for Email Install & Mentor 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 ECM Account Team, the <IBM Cust> technical staff and, when applicable, an IBM Business Partner. Examples of Project Team members are listed below.

3.1 ECM Team Resources

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

- Implementation Project Manager (“IPM”) – Project Lead
- Lab Services Consultant (“ECM Consultant”)
- Field Delivery Consultant (“FDC”)
- Software Sales Representative (“SSR”)
- Sales IT Specialist (“Sales ITS”)

3.2 <IBM Cust> Team Resources

<IBM Cust> will need to identify internal personnel to fill the roles of the <IBM Cust> Project Team. <IBM Cust> is responsible for selecting a Project Lead to share lead responsibilities with the ECM Project Lead.

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

- Project Lead
- IBM FileNet System Administrator
- IBM CM8 Administrator
- IBM ICC Administrator
- Document/Records Manager
- System Operations Coordinator
- Client Desktop Coordinator
- LAN Administrator
- Database Administrator
- 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 ECM Project Lead.

ICC for Email Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the ICC for Email system and will serve as the on-going administrator. This individual will work closely with the ECM Consultant during installation and configuration of the ICC for Email software.

IBM FileNet System Administrator (1 to 3 people) - This individual will be responsible for the administration functions of P8 CM and IBM FileNet Email Manager (“EM”), and Records Manager (“RM”). This individual will also provide proper passwords to allow ECM Consultants to perform their functions in the course of the installation when access to P8 CM, EM, or RM is required. Attendance in the Administration classes is required and should be completed prior to the installation of the ICC for Email software. This individual will work closely with the ECM Consultant during installation and configuration of the ICC for Email software.

IBM CM8 System Administrator (1 to 3 people) - This individual will be responsible for the administration functions of CM8, CommonStore, and RM. This individual will also provide proper passwords to allow ECM Consultants to perform their functions in the course of the installation when access to CM8, CommonStore, or RM is required. Attendance in the Administration classes is required and should be completed prior to the installation of the ICC for Email software. This individual will work closely with the ECM Consultant during installation and configuration of the ICC for Email software.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

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

- a.) Project Prerequisites
 - All prerequisites must be met before IBM can begin the installation of the product.
 - All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software. This includes:
 - Installation of the operating system
 - Installation of the customer-supplied database
 - Installation/application of appropriate levels of patches to meet ECM’s minimum requirements
 - If P8: Installation of CM.
 - If CM8: Installation of CM.
 - The ICC server requires a separate computer or partition that runs one of the supported Windows operating systems. This computer or logical machine must be connected by a TCP/IP network to the repository server and to your Lotus Domino or Microsoft Exchange servers.
 - For Microsoft Exchange, this computer must be in the same domain as the Exchange servers.
 - For Lotus Domino, this computer requires a Lotus Notes runtime. You can provide this runtime by installing a Lotus Client or a Lotus Domino server.
 - For information about the supported Windows systems, see: <http://www.ibm.com/support/docview.wss?rs=484&uid=swg27012904#OS1>
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download the ICC for Email software to the appropriate servers prior to the resource arriving at <IBM Cust>’s facility.
 - Have attended the required training prior to the installation of any ECM software.
- 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/requirements gathering of business application rules, business application processes, and application security access as they pertain to the installation of ICC for Email system.
- d.) Local system administrator(s) trained on the administration of the ECM products installed at <IBM Cust>.
- e.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the ECM Consultant during the installation, he or she will be responsible for expanding the system post-installation.
- f.) Adequate facilities for the ECM resources; including cubicles, desks, and telephone, hardware and Internet access service.
- g.) Product Subscription and Support Agreement in place through IBM.
- h.) <IBM Cust> will make available all <IBM Cust> personnel required for this project in a timely manner. 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 PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2 IBM Responsibilities

- Review requirements and configuration options
- Review <IBM Cust>'s platform/architecture environment
 - P8 CM or CM8
 - Lotus Notes or MS Exchange
- Install ICC for Email
 - ICC User-exit (CM8 environments only)
 - ICC for Email software
 - ICC Client for Email Platform
 - ICC Outlook Extension (for Microsoft Outlook Mail environments only)
 - ICC OWA Support (Outlook Web Access environments only)
 - ICC Lotus Notes Client Template Enablement (Domino Environments only)
- ICC Configuration Review
 - Data-store
 - Connector
 - Metadata & List
 - Task-route
 - Email service
 - Notes Template enablement
 - Outlook Extensions
- Configure Sample Configuration for Mentoring
 - Configure up to five (5) sample Task Routes

- Include Interactive collector in task route definition
 - Include archiving task route with no immediate stubbing
 - Include one (1) life cycle sub task route
- i.) Test ICC for Email System
 - i. Ensure email is captured to repository per configured sample task routes
 - ii. Ensure Email Client is functioning
 - 1. Capture from client successfully
 - 2. Search from Client successfully
 - 3. Offline Repository functionality is working
 - 4. Email Stubbing from client Successful
 - j.) Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
 - k.) Demonstrate the ICC for Email System to <IBM Cust> Project Team
 - l.) Provide <IBM Cust> a completed ICC for Email Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) The ICC for Email Install & Mentor Package does not include integration with the IBM Classification Module.
- b.) Installation of ICC for Email software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- c.) Additional resources and time for the development of “custom applications” are not included in this service.

6.2 Service Limitations

The ICC for Email does not include repairs, corrections or troubleshooting of performance degradation, data corruption, errors and faults that are discovered during the process due to hardware failures, or non-qualified hardware or operating systems. Repairs, corrections or troubleshooting of such errors and faults will be <IBM Cust>’s responsibility; any IBM involvement will be charged on a Time and Materials (“T&M”) basis.

ECM 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 service includes domestic travel and living expenses incurred by ECM resources traveling to <IBM Cust>’s site in order to fulfill IBM’s tasks and responsibilities pertinent to delivering this Install Package.

The IPM will initiate the project with a kickoff conference call. Any additional status meetings required will be held via conference calls as well. The ECM Consultant will travel to <IBM Cust>'s site for **one (1)** visit (up to three (3) days) for tasks associated in delivering this package service.

Additional onsite assistance requested by <IBM Cust> beyond the amount specified in the above paragraphs may be billable subject to the execution of a PCR. IBM also reserves the right to bill <IBM Cust> for any additional trips that are the direct result of <IBM Cust>'s failure to meet or perform its obligations outlined herein.

7. Project Tasks & Deliverables

The Project Team will perform the following tasks. Deliverables for each task are detailed within the task descriptions.

7.1 Task 1: Kickoff Meeting

The purpose of this meeting is to prepare both the <IBM Cust> team and the ECM team for the ICC for Email Service. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The IPM will review the Package Service Description, the installation tasks, and roles and responsibilities with <IBM Cust>'s Project Team.

7.1.2 Define/Review Project Plan

Once selected, the Project Team customizes the sample project plan that best fits <IBM Cust>'s installation needs (see Sample Project Plan). The plan is designed to complete the installation in the shortest possible timeframe. 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 IPM 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: Platform/Architecture Configuration Document & Review

The IPM 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. This review will encompass the items indicated in the Platform/Architecture Configuration Document that was delivered to <IBM Cust> during the kickoff meeting.

- P8 CM or CM8
- Appendix A – ICC for Email Pre-Install Worksheet

Upon successful completion of the Prerequisite Fail Safe Meeting, the IPM will schedule the software installation at least two (2) weeks into the future.

7.3 Task 3: Software Installation

The ECM Consultant, with the assistance of <IBM Cust>'s Information Technology ("IT") staff, will schedule the server software installation. <IBM Cust>'s IT 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 successful software installation.

A member of <IBM Cust>'s IT staff must have attended the appropriate Administration training prior to this step to facilitate appropriate system configuration choices and ease support transition to <IBM Cust>.

The ECM Consultant performs the following steps to ensure a successful installation:

- Install ICC User-exit (CM8 environments only)
- Install ICC for Email software
- Install ICC Client for Email Platform
 - Microsoft Exchange
 - ICC Outlook Extension
 - ICC OWA Support (Outlook Web Access environments only)
 - Lotus Domino
 - ICC Lotus Notes Client Template Enablement
 - Enable one standard Notes template
 - Test Domino Web Access (Domnio Web Access environments only)

7.4 Task 4: ICC Configuration Review

The ECM Consultant will review the following with <IBM Cust>'s ICC for Email Administrator to prepare for the Sample Configuration and Mentoring.

- Data-store
- Connector
- Metadata & List
- Task-route
- Email service

7.5 Task 5: Sample Configuration for Mentoring

The ECM Consultant along with <IBM Cust>'s ICC for Email Administrator will utilize the ICC Configuration Manager to illustrate a typical sample configuration as a means of knowledge transfer and mentoring. This is an opportunity for <IBM Cust> to learn how to configure and maintain the system going forward.

The ECM Consultant along with <IBM Cust>'s ICC for Email Administrator will review or performing the following as necessary for the sample configuration.

- Configure up to five (5) sample Task Routes
- Include Interactive collector in task route definition
- Include archiving task route with no immediate stubbing

- Include one (1) life cycle sub task route

7.6 Task 6: Test

After the ICC product has been configured, the ECM Consultant and <IBM Cust> Project Team members perform functional testing. This will verify that all components have been correctly configured and are operating as expected.

- Ensure email is captured to repository per configured sample task routes
- Ensure Email Client is functioning
 1. Capture from client successfully
 2. Search from Client successfully
 3. Offline Repository functionality is working
 4. Email Stubbing from client Successful

7.7 Task 7: System Administration Handoff

7.7.1 Transfer of Information

The ECM Consultant will review the ICC for Email product configuration with the <IBM Cust> System Administrator to better prepare <IBM Cust> for further expansion of the system. The ECM Consultant will reinforce topics covered in the Learning Services courses required for this Install Package.

7.7.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <IBM Cust>'s System Administrator with respect to maintenance of the ICC for Email system. These are tasks that should be performed daily and will be specific to <IBM Cust>'s usage of the ICC for Email system 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 ECM Consultant will review possible backup strategies with the <IBM Cust> System Administrator. This Install Package does not provide for the ECM 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 ECM 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 configuration has been tested, the ECM Consultant will demonstrate the ICC for Email 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: Project Completion

Upon demonstration of the product the ECM Consultant will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to the *ICC for Email Install & Mentor Checklist*.

If issues arise after completion of the project, <IBM Cust>'s Project Team will attempt to resolve these problems independently or with the assistance of the IBM Product Support Center.