



IBM Customer ***Content Manager OnDemand
for z/OS Install Package
Service Description***

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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:

- Content Manager OnDemand for z/OS (“CMOD for z/OS”) Install Package

This service provides the expert resources to install the CMOD for z/OS software at your site. It also provides hands-on assistance to address questions, recap key issues covered in formal training classes, and to ensure that <IBM Cust>’s systems and resources are ready to begin applying the knowledge gained in class to <IBM Cust>’s business needs and operational requirements. The ECM Consultants will help guide <IBM Cust> on proven strategies and procedures that have been utilized by other successful ECM installations. The completed installation also ensures that the software is supportable by IBM’s Support organization.

The scope of this Installation Package is limited to the assistance with the installation of CMOD for z/OS in a single test or development environment¹.

This CMOD Installation Service will provide:

- Review of <IBM Cust>’s platform/architecture environment
- On-Site Technical Planning
- Environment Preparation
- Subsystem Enablement
- Application Analysis
- Installation to include:
 - Install Server Function
 - Create & Configure HFS Files
 - Configure System Initialization
 - Perform Base Functional Testing
- Install one (1) OnDemand for z/OS Client (3270 or GUI)
- Application Setup and Verification
- Demonstrate the System to the Project Team
- System Handoff
- Project management and coordination to facilitate a successful and professional project delivery

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

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

¹ This service is limited to the installation and configuration of (1) CMOD library server, (1) CMOD object server, (1) OnDemand CMOD GUI client (or 3270 client). Installation and configuration of any additional services other than those required as part of the installation of the CMOD are considered additional options. Pricing for any additional services will be as published in the current IBM price book or addresses through a Statement of Work. Contact your Lab Services Sales Manager (“LS LM”) for options.

At the completion of the Installation Package, <IBM Cust>'s system and resources will be ready for maintenance support and for initiating the process to configure the system for <IBM Cust>'s specific business requirements. This installation assumes individuals knowledgeable on IBM products will be performing the tasks to identify the <IBM Cust> specific definition of the system after the completion of this project. These definition services are outside the scope of deliverables of this Install Package².

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:

- Course Code: IM110 - Introduction to IBM DB2 Content Manager OnDemand (4.5 days)

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 CMOD for z/OS Install Package. Please refer to the [IBM Learning Services Web site](#) for detailed information regarding class cost, schedules, course descriptions, ordering options, registration instructions and relevant IBM Web site locations.

While the training defined in this service provides a good foundation for administering the system in a pre-production status, <IBM Cust> should not consider this the total set of training that their resources will need to manage their production system. The ECM Education Team can assist <IBM Cust> in obtaining a recommended training plan specific to <IBM Cust>'s requirements.

For individual training recommendations, please reference the [ECM Training Paths](#).

For training recommendations for your entire organization, please request an [Enterprise Training Plan](#) or contact the ECM Education Team at ecmeduna@us.ibm.com or 800-455-7468.

IBM Learning Services Web Site:

www.ibm.com/software/data/content-management/training.html

In the interests of quality education, IBM reserves the right to update training courses at any time.

3. Resources

The <IBM Cust> Project Team will consist of the resources from the 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

² Services to configure all site and user specific preferences can be accommodated by through a Statement of Work. Contact your LS SM for options.

- Lab Services IT Specialist (“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
- OD/zOS Report Administrator
- OD/zOS System Administrator
- zOS System Programmer
- z/OS DFSMS System Administrator
- Unix System Services Administrator
- DB2 System Programmer
- DB2 Database Administrator
- Network (TCP/IP) System Programmer
- Security Administrator

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.

CMOD for z/OS System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the CMOD for z/OS system and will serve as the on-going administrator. Attending the CMOD class is required and should be completed prior to the installation of the software. This individual will work closely with the ECM Consultants during installation and configuration of the CMOD for z/OS 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
 - All prerequisite hardware and software has been installed onto <IBM Cust>'s designated ECM servers.
 - Have attended the required training prior to the installation of any ECM software.
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download the software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
- 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 the CMOD for z/OS system.
- d.) Local system administrator(s) trained on the administration of the ECM products to be 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 to expand the system post-installation.
- f.) Local help desk personnel trained on the ECM client products to be installed at <IBM Cust>.
- g.) Adequate facilities for the ECM Consultants; including cubicles, desks, and telephone, hardware and Internet access service. For the on-site Technical Planning session <IBM Cust> will provide:
 - a meeting room sized to accommodate ECM Consultants and <IBM Cust> staff,
 - a PC projector,
 - a flip chart or white board, and
 - general assistance to support this on site meeting.
- h.) Product Subscription and Support Agreement in place through IBM.
- i.) <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 PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2 IBM Responsibilities

- a.) Project Management
 - Responsibilities here
- b.) Review <IBM Cust>'s CMOD Architecture & Prerequisites
- c.) On-Site Technical Planning
 - Detailed Project Plan

- Prerequisite Validation
- d.) Environment Preparation
 - Configuration Assistance for:
 - CICS
 - DB2
 - SMS/OAM
 - TCP/IP
 - USS
- e.) Subsystem Enablement
 - Configure & Initialize Storage Hierarchy
- f.) Application Analysis for 3 Reports
- g.) Installation
 - Install Server Function
 - Create & Configure HFS Files
 - Configure System Initialization
 - Create & Initialize Database
 - Perform Base Functional Test
- h.) Install one (1) OnDemand for z/OS Client (3270 or GUI)
- i.) Application Setup & Verification
- j.) Perform System Handoff
 - OnDemand Report Administration Overview
 - System Administration Transition
 - SMS/OAM Transition
 - T3 Client Transition
 - Problem Reporting
- k.) Demonstrate Product to the Project Team
- l.) Provide <IBM Cust> a completed CMOD for z/OS Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) Implementation of the CMOD for z/OS and OD/zOS Version 7 software will be delivered in a single test environment on your system.
- b.) Installation of CMOD for z/OS 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 CMOD for z/OS Install Package does not include repairs, corrections or troubleshooting of performance degradation, data corruption, errors and faults that are discovered during the process due to hardware failures, or non-qualified hardware or operating systems. Repairs, corrections or troubleshooting of such errors and faults will be <IBM Cust>'s responsibility; any IBM involvement will be charged on a Time and Materials ("T&M") basis.

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 IBM PM will initiate the project with a kickoff conference call. Any additional status meetings required will be held via conference calls as well. The ECM Consultants will travel to <IBM Cust>'s site for up to **four** (4) visits (up to five individual team member trips) for tasks associated in delivering this Install 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 CMOD for z/OS Install Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

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

7.1.2 Define/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: On-Site Technical Planning Session

The IPM and ECM Consultants will review the IBM software purchased, <IBM Cust>'s server configuration (hardware, operating system and site specific software), IBM specific network configuration, and <IBM Cust>'s System Diagram. This review will encompass the items indicated in the prerequisite document that was delivered to the <IBM Cust> prior or during the Kickoff Conference Call.

Agenda:

- OD/zOZ Project Management
- Environment Preparation
- Subsystem Customization
- CMOD Server Software Installation
- System Administration

7.3 Task 3: Environment Preparation

The ECM Consultants along with <IBM Cust>'s appropriate administrators will enable the subsystems and interfaces required by OnDemand. The prerequisite software products must be installed and operational. Activities to include:

- Verify availability of proper levels of prerequisite z/OS or OD/zOS server software
- Enable subsystem interfaces for:
 - a. DFSMS
 - b. OAM
 - c. USS
 - d. TCP/IP

7.4 Task 4: Subsystem Enablement

The purpose of this task is to customize host based software required by the OnDemand service offering. The task addresses the customization of OnDemand sample files, OAM, SMS, and DB2 to meet <IBM Cust>'s unique requirements as defined in your SMS Storage Hierarchy Design analysis. To support your subsystem customization effort, sub-tasks are:

- Customize OAM/SMS
 - Define optical/tape configuration
 - Define OAM DB2 data structures
 - Define SMS resources
 - Create SMS constructs
 - Customize DB2
 - Analyze storage requirements
- Define Databases to include:
 - OAM storage groups

- OAM administrative database
- Optical configuration database
- Verify AFP Conversion and Indexing Facility (“ACIF”) if application indexing with ACIF is a requirement

7.5 Task 5: Application Analysis for 3 Reports

The ECM Consultant will assist your personnel in performing a limited requirements review to develop OnDemand and subsystem enablement plans. This review will be limited to gathering the necessary information to plan for the use of up to three (3) <IBM Cust> applications (a report or print stream), in the OnDemand environment. Activities will include:

Assist in the analysis of production application characteristics

- Types of print data streams to be supported
- Frequency of production
- Volume
- Access and retention
- Reproduction
- Capture alternatives

Assist in the analysis of <IBM Cust> SMS Storage Hierarchy Design

- Storage groups
- SMS constructs
- Collection name standards

Assist in the analysis of <IBM Cust> OnDemand Application Usage

- Logical organization of the data streams
- Retrieval constraints

The outcome of this effort will be:

- SMS Storage Hierarchy Design Worksheet
- OnDemand Application Usage and Storage Sizing Summary Worksheet

7.6 Task 6: Base Product Installation

The purpose of this task is to complete the required steps to install the OD for z/OS software and properly configure the related sub-systems to support that installation. Sub-tasks include:

- Install Library & Object Server Function
- Create & Configure HFS Files
- Configure System Initialization
- Create & Initialize Database
- Perform Base Functional Test

7.7 Task 7: Install OnDemand for z/OS Client (3270 or GUI)

The OnDemand Client Software runs on the end-user workstations and interfaces to the host Content Manager OnDemand for z/OS and OD/zOS Version 7 system. The ECM Consultant along with <IBM Cust>'s System Administrator will install the OnDemand Client on up to three (3) workstations, located at the same address. Activities to include:

- Verify availability of the Proper Levels of Prerequisite Workstation Software
- Install OnDemand Client PC Software including one copy of the administrative interface
- Perform installation verification procedure test ("IVP")

7.8 Task 8: Application Setup & Verification

The purpose of this task is to assist with implementation of up to three (3) application(s) (identified/designed during the "Applications Analysis" task), in the OnDemand environment, including:

- Define the entries for the application, application groups, and folders
- Define the Indexing requirements
- Define Retention requirements
- Define Storage requirements
- Asses changes to Production JCL
- Determine Capture Alternatives
 - Define data loading in application job stream
 - Automate data loading

7.8.1 Verify Environment

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

7.9 Task 9: System Handoff

7.9.1 OnDemand Report Administration Overview

- Review of Report Administration in <IBM Cust>'s environment
- Review Advanced tips and techniques for complex reports

7.9.2 System Administration Transition

The ECM Consultant will perform an overview of the OnDemand Administration/Utilities/Exits as well as of ODF and ODWEK Administration.

- Review of Program Products
- OnDemand High-Level Architecture
 - OnDemand HFS Overview
 - System Installation and Configuration

- Database and System Tables
- Data Loading
- OnDemand V7 Exits and Utilities
- Overview of OnDemand Distribution Facility
- Overview of OnDemand WEB Enablement Kit
- Best Practices
 - Performance Tuning
- System Administrator Requirements

7.9.3 Production Migration Planning

- Facilitate a meeting/discussion to plan production migration
- Provide tips and techniques for OnDemand production migration

7.9.4 SMS/OAM Transition

The ECM Consultant will deliver an overview of how Content Manager interfaces with Object Access Method (“OAM”). How OAM manages the data archived in OnDemand.

- Understanding Storage Management System (“SMS”) and OAM components required for OnDemand
 - Collection Name
 - Object Name
 - Storage Group
 - Storage Class
 - Management Class
- Understanding the Object Storage Management Component (“OSMC”) requirements
 - Object Backup
 - Object Transition
 - Object Expiration
- OAM Recovery
 - Single Object
 - Tape or Optical volume
 - Database
 - Collection Name
- OAM DB2 Databases
 - OAM Object Database
 - OAM Optical Configuration Database
 - Object Administration Database

7.9.5 T3 Client Transition

The ECM Consultant will provide tips and techniques for use of the OnDemand client.

7.9.6 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> CMOD System Administrator will learn to determine the nature of problems that arise will be able to resolve or report them as necessary.

For integrity issues, IBM requests that <IBM Cust> contact IBM Customer Support by using the IBM toll free Customer Service telephone number (1-800-429-7378).

7.10 Task 10: Demonstrate System to <IBM Cust> Project Team

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

7.11 Task 11: Project Completion

Upon demonstration of the product, the ECM Consultants will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *Content Manager OnDemand for z/OS Install Checklist*.

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