



IBM Customer *IBM FileNet Business Process
Framework Install and Mentor
Package Service Description*

January 2, 2009



Table of Contents

- 1. DESCRIPTION OF SERVICES 1**
- 2. REQUIRED PRODUCT TRAINING 1**
- 3. RESOURCES 2**
 - 3.1 ECM TEAM RESOURCES 2
 - 3.2 <IBM CUST> TEAM RESOURCES 2
- 4. ROLE DEFINITIONS 3**
- 5. RESPONSIBILITIES 3**
 - 5.1 <IBM CUST> RESPONSIBILITIES 3
 - 5.2 IBM RESPONSIBILITIES 4
- 6. ASSUMPTIONS & LIMITATIONS 4**
 - 6.1 ASSUMPTIONS 4
 - 6.2 SERVICE LIMITATIONS 5
 - 6.2.1 Travel & Living Expenses 5
- 7. PROJECT TASKS & DELIVERABLES 5**
 - 7.1 TASK 1: KICKOFF MEETING 5
 - 7.1.1 Review Project Services Description 5
 - 7.1.2 Define/Review Project Plan 5
 - 7.1.3 Project Status 6
 - 7.2 TASK 2: PLATFORM/ARCHITECTURE CONFIGURATION DOCUMENT & REVIEW 6
 - 7.3 TASK 3: BPF INSTALLATION 6
 - 7.3.1 Software Installation 6
 - 7.3.2 System Functionality Test 6
 - 7.4 TASK 4: BPF TRAINING 6
 - 7.5 TASK 5: BPF APPLICATION DEVELOPMENT MENTORING 6
 - 7.6 TASK 6: SYSTEM ADMINISTRATION HANDOFF 7
 - 7.6.1 Transfer of Information 7
 - 7.6.2 Routine Maintenance 7
 - 7.6.3 Problem Reporting 7
 - 7.7 TASK 7: DEMONSTRATE SYSTEM TO <IBM CUST> PROJECT TEAM 7
 - 7.8 TASK 8: PROJECT COMPLETION 7

Proprietary Notice

This document contains confidential information of IBM®, which is provided for the sole purpose of permitting the recipient to evaluate the Service Description submitted herewith. In consideration of receipt of this document the recipient agrees to maintain such information in confidence and to not reproduce or otherwise disclose this information to any person outside the group directly responsible for evaluation of its contents. Any proposed design and approach presented in this Service Description is proprietary information and may not be used on other projects without written approval from the IBM Enterprise Content Management organization.

© Copyright IBM Corporation, 2009. All Rights Reserved.

1. Description of Services

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

- IBM ECM Business Process Framework (“BPF”) Install & Mentor Package

This service provides the expert resources to install the BPF software. This provides hands-on assistance to address questions, to recap key issues, and to confirm that <IBM Cust>’s systems and resources are ready to begin applying <IBM Cust>’s business needs and operational requirements.

The ECM Consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed by other successful ECM installations. The completed installation also verifies that the software is supportable by IBM’s Product Support organization.

This BPF Install & Mentor Package provides <IBM Cust> with the core interface to BPF and includes the following for one (1) environment:

- Preinstall review of the following
 - Hardware
 - Software
 - Database
 - Network
 - Web
- Install BPF on one (1) environment
- Test functionality
- Demonstrate Product
- Mentor <IBM Cust> on BPF Application Development
- Deliver project management and coordination

BPF is a delivery approach that utilizes consistent, reusable code and tools, enabling <IBM Cust>’s development team to create custom applications. This Install & Mentor Package includes overall project management, system information gathering, installation, testing, and training tasks necessary for the BPF. The duration of each task may vary based on <IBM Cust>’s configuration and complexity of environment. For a successful installation, <IBM Cust> is expected to provide resources in a timely manner, to assist in the completion of these tasks.

The success of this project depends on availability of key <IBM Cust> resources to assist in IBM’s understanding of the business requirements.

Changes in the scope of work defined in this Services Description may result in additional costs to 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: F002 – P8 Platform Administration
- Course Code: F898 - IBM FileNet BPF Foundation

- Course Code: F899 - IBM FileNet BPF Developer

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 BPF Install & Mentoring Package. Please refer to the [IBM Learning Services Web site](#) for detailed information regarding class cost, schedules, course descriptions, ordering options, registration instructions and other 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 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
- FileNet System Administrator
- Web Master/Web Designer
- System Operations Coordinator

- Client Desktop Coordinator
- LAN Administrator
- Database Administrator
- Document/Records Manager
- Document Entry Supervisor
- End-User Manager
- End-User Specialist
- Application Developer
- Workflow Consultant

4. Role Definitions

<IBM Cust> must identify resources to fill the roles as listed in Section 3, Resources. The following outlines roles for each of these individuals. Additional resources may be required at various phases of the installation. Not all of the individuals will 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.

FileNet System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the BPF system, and will serve as the on-going administrator. Attending the required classes and should be completed prior to the Mentoring phase of this project. This individual will work closely with the ECM Consultant during the configuration of the BPF software.

DBA (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow ECM Consultants to perform their functions in the course of the installation when access to the database is required.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate a successful project, <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
 - BPF prerequisites found on the installation media
 - All prerequisite hardware and software has been installed onto <IBM Cust> designated ECM servers
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download BPF software to the appropriate servers prior to the resource arriving at <IBM Cust>'s site.
 - Have attended the required training prior to the Mentoring phase of this project.

- b.) A Project Lead with sufficient authority to
 - Represent <IBM Cust>'s interests
 - Serve as the focal point for all decisions and communications
 - Coordinate activities assigned to <IBM Cust> resources
 - Sign project-related documents
- c.) Analysis and requirements for business application rules, processes, and security as they pertain to the installation of BPF.
- d.) <IBM Cust>'s Resource(s) attendance of the required ECM Training Courses, BPF Foundation and BPF Developer, prior to the BPF Application Development Mentoring.
- e.) Local system administrator(s) trained on the administration of ECM products previously installed.
- f.) Product Subscription and Support Agreement in place through IBM.
- g.) Adequate facilities for the ECM resources; including cubicles, desks, and telephone, hardware and Internet access service.
- h.) <IBM Cust> will make available all <IBM Cust> resources required for this project in a timely manner. Significant delays caused by <IBM Cust> resources not being available or project prerequisites not being met may result in schedule delays and additional costs. These situations will be documented in a PCR.

5.2 IBM Responsibilities

- a.) Preinstall review:
 - Hardware
 - Software
 - Database
 - Network
 - Web
- b.) Install BPF on one (1) environment
- c.) Test BPF functionality
- d.) Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Problem Reporting
- e.) Demonstrate the Product
- f.) Mentor <IBM Cust> on BPF Application Development
- g.) Deliver the BPF Install & Mentor Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) Installation of the BPF software will not be in a clustered environment. A chargeable PCR will be required to perform the installation in a clustered environment.
- b.) Additional resources and time to develop “custom applications” are not included in this Install.

6.2 Service Limitations

The BPF Install & Mentor 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 non-qualified hardware, or non-qualified operating systems. Any IBM involvement will be charged on a Time and Materials ("T&M") basis and documented in a PCR.

Installation of IBM FileNet Content Manager ("CM") or IBM FileNet Business Process Manager ("BPM") is not included within the scope of this Install.

IBM 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 does not include travel and living expenses. Related travel and living expenses for ECM resources will be charged in addition to the fixed price for services and <IBM Cust> will be billed separately as travel and living expenses are incurred.

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 up to **two (2)** visits for tasks associated in delivering this package service.

Additional onsite assistance requested by <IBM Cust> beyond the scope defined in this Install will be billable and documented in a Project Change Request (PCR). IBM 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

This meeting is to prepare the <IBM Cust> team and ECM project team for the BPF Install & Mentor. 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 & Mentor Service Description, tasks, 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

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 Platform/Architecture Configuration Document that was delivered to <IBM Cust> during the kickoff meeting. Upon successful completion of <IBM Cust> portion of the document, the IPM will schedule the software installation at least two (2) weeks into the future.

7.3 Task 3: BPF Installation

7.3.1 Software Installation

The ECM Consultant, with the assistance of <IBM Cust>'s Information Technology staff, schedules the software installation. <IBM Cust>'s Information Technology staff must review the release notes included on the software media, which provides the latest information regarding operating system software release levels and patches required for a successful software installation.

The installation is a step-by-step process which must be completed in order.

- Data Storage Setup
- Web Deployment
- Workflow Setup
 - Queue Setup
 - BPF Operations Setup
 - Process Map Setup
- Metastore Configuration
- General Configuration & Verification

7.3.2 System Functionality Test

After BPF has been installed and configured, the ECM and <IBM Cust> Project Team members perform functional testing of the implemented processing functions to confirm that all components have been correctly configured and are operating as expected.

7.4 Task 4: BPF Training

This Install Package requires attendance of <IBM Cust> in the BPF Foundation and BPF Developer courses prior to initiating Task 5: BPF Application Development Mentoring.

7.5 Task 5: BPF Application Development Mentoring

BPF Mentoring provides the onsite assistance needed to put the BPF tools and training knowledge gained into practice. The ECM Consultant will work with your project personnel with a best practice approach to begin the design and development of your BPF application. The mentoring provided is at the direction of your project

manager and focuses on the areas you need the most help with. Typically this includes getting started in these key areas:

- Provide guidance on business process design and how to translate business requirements into BPM and BPF configurations.
- Advise developer personnel on how best to write functional code extensions to BPF.
- Provide recommendations on managing multiple deployment environments

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

The ECM Consultant reviews the BPF product installation with the <IBM Cust> System Administrator to prepare <IBM Cust> for expansion of the system. The ECM Consultant will reinforce topics covered during the installation.

7.6.2 Routine Maintenance

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

7.6.3 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 will be able to resolve or report them as necessary.

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

7.7 Task 7: 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.

7.8 Task 8: 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 *IBM FileNet BPF Install & Mentor 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.