IBM

IBM Customer

IBM FileNet Content Federated Services for Image Services Install Package Service Description

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1. Description of Services

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

> ➢ IBM FileNet Content Federated Services for Image Services ("CFS-IS") Install Package

This service will facilitate the smooth and rapid deployment of Content Federated Service ("CFS") to enable IBM FileNet Image Services ("IS") to be used as a fixed content store for Content Manager ("CM") systems.

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

The scope of this CFS-IS Install Package is limited to base configuration of the CFS.

The CFS-IS Install Package will provide basic technical planning, installation, testing, and support review for a CFS-IS base installation.

- Review <IBM Cust>'s current environment (IS/CM) to understand the document flow, ingestion location, document classes, indices/properties, security, etc.)

- The creation of a CFS-IS Design Document that will be used as a "road map" for implementing CFS-IS for <IBM Cust>.

- Implementation of CFS-IS on <IBM Cust>'s production system[1].

    - Installation of CFS-IS software.[2]
    - Configuration of <IBM Cust>'s CFS-IS as detailed in the CFS-IS Design Document.

- Review CFS-IS functionality with <IBM Cust>'s system administrator(s).

- Mentor <IBM Cust>'s system administrator(s) on migration "best practices" (how to execute metadata migration jobs, job management, and reconciliation).

- System Administration Handoff

- Demonstration of the CFS-IS system to the Project Team

- Project management and coordination to facilitate a smooth and professional project delivery.

This Install Package includes a set of tasks that <IBM Cust> must complete to facilitate a 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 CFS-IS environment.

The resources outlined in this plan will include both the IBM and <IBM Cust> personnel that are required to successfully install and configure the CFS-IS 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 Product Change Request ("PCR").

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[1] These services include CFS-IS installation for 1 (one) Image Manager environment and 1 (one) Content Manager environment. Installation and configuration of any additional environments are considered additional options. Contact your local Lab Services Sales Manager ("LS SM") for pricing on any additional install services.
[2] Installation of the CFS–IS software requires Image Services version 4.0 SP3 or higher, Image Services Toolkit version 4.0 SP3 or higher, Remote Admin Console workstation 4.0.30 or higher, P8 Application Engine version 3.5 or higher, and P8 Content Engine version 3.5 or higher. An upgrade from previous versions of any of these to a current version is outside of the scope of this package.

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: F458 – IS System 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 CFS-IS 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 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

- ECM 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

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.

FileNet System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the CFS software and will serve as the on-going administrator. Attending the Administration classes are required and should be completed prior to the installation of the software. This individual will work closely with the ECM Consultant during installation and configuration of the 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 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
- Perform a network check (verify server connectivity to network, addressing, correct protocol).
- Download the CFS-IS 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 CFS.

d.) Local system administrator(s) trained on the administration of the ECM products.

e.) After the <IBM Cust> System Administrator has observed the ECM Consultant during the installation, he or she will be responsible for expanding the system.

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 PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2   IBM Responsibilities

a.) Provide project management and reporting

b.) CFS–IS requirements gathering

c.) Provide a CFS-IS Design Document

- Document up to ten (10) Document Classes
- Document up to twelve (12) Indexes

d.) Install CFS-IS on <IBM Cust>'s production system and test one (1) mapping

e.) Configure <IBM Cust>'s CFS-IS

- Map up to ten (10) Document Classes
- Map up to twelve (12) Indexes

f.) Mentor <IBM Cust>'s System Administrator on how to execute the migration effort (export jobs), job management, and reconciliation

g.) System Administration Handoff

- Transfer of Information
- Routine Maintenance

- Problem Reporting

h.) Demonstrate the CFS-IS system to the <IBM Cust> Project Team

i.) Provide <IBM Cust> a completed CFS-IS Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

a.) <IBM Cust> is running the currently supported ECM software releases. The following products must already be installed, configured, and fully operational prior to the commencement of the CFS-IS Implementation Services[3].

- Image Services version 4.0 SP3 or higher

- Image Services Toolkit version 4.0 SP3 or higher

- Remote Admin Console workstation 4.0.30 or higher

- P8 Application Engine version 3.5 or higher

- P8 Content Engine version 3.5 or higher

b.) Installation of CFS-IS 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 CFS-IS 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 IPM will initiate the project with a kickoff conference call. Any additional status meetings required will be held via conference calls as well. The FDC and the ECM Consultant will each travel to <IBM Cust>'s site for **one (1)** visit 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.

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[3] Performing upgrades to these systems to meet the required prerequisites is outside the scope of the CFS-IS Install Package. ECM can perform these upgrades for <IBM Cust> using the appropriate IBM FileNet Install services.

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 CFS-IS 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: 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. Upon successful completion of <IBM Cust>'s portion of the document, the IPM will schedule the software installation at least two (2) weeks into the future.

7.3 Task 3: Requirements Gathering

This portion of the install service will assist <IBM Cust> with identifying the requirements for their CFS-IS configuration. The ECM Consultant will evaluate <IBM Cust>'s document storage requirements with regards to document ingestion, document retrieval, document class mapping, property mapping, and security. The output of the requirements gathering will be a design document (CFS-IS Design Document) documenting <IBM Cust>'s CFS–IS configuration.

7.4 Task 4: CFS–IS Design Document

The output of IBM's requirements gathering is a CFS-IS Design Document. The CFS-IS Design Document will contain the following information:

- Document Class Mappings (up to ten) (10)
- Index/Property Mappings (up to twelve) (12)

- Security Definitions (if needed)
- Catalog Export Process Definitions

7.5   Task 5: Installation and Configuration

Once there is a defined configuration, the FDC will install the CSF-IS software and perform one test mapping to validate that the product is working as expected.

The ECM Consultant will follow the software installation and configure <IBM Cust>'s CFS-IS as detailed in the CFS–IS Design Document.

- Map up to ten (10) Document Classes
- Map up to twelve (12) Indexes

7.6   Task 6: Migration Mentoring

The ECM Consultant will configure export jobs and migrate a selection of data ((up to ten thousand (10,000) documents for no more than four (4) document classes)), while training <IBM Cust> personnel to perform the remainder of the migration.

The ECM Consultant will provide technical support for the migration process and to analyze all export job procedures, including a review of the logs, with <IBM Cust>'s System Administrator.

The ECM Consultant will validate the success of the initial migration by retrieving twenty-five (25) random documents from the migrated selection. Successful retrieval of the documents will constitute project completion.

Migration training includes the following:

- Export job set-up
- Migrate a selection of data with full training
- Migration procedures and user documentation for Migration Tools
- Initial migration and image retrieval testing

7.7   Task 7: System Administration Handoff

7.7.1   Transfer of Information

The ECM Consultant will review the CFS-IS configuration and CFS-IS functionality with <IBM Cust>'s system administrator(s).

7.7.2   Routine Maintenance

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

7.7.3   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 FDC 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 samples have been tested, IBM ECM will demonstrate CFS-IS 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 completion of the Package, the ECM Consultants will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *Content Federated Services for Image Services 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.