



IBM Customer ***IBM CommonStore for Lotus
Domino Install 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 4
- 6. ASSUMPTIONS & LIMITATIONS 5
 - 6.1 ASSUMPTIONS 5
 - 6.2 SERVICE LIMITATIONS 6
 - 6.2.1 Travel & Living Expenses 6
- 7. PROJECT TASKS & DELIVERABLES 6
 - 7.1 TASK 1: KICKOFF MEETING 6
 - 7.1.1 Review Project Services Description 6
 - 7.1.2 Define/Review Project Plan 6
 - 7.1.3 Project Status 7
 - 7.2 TASK 2: PLATFORM/ARCHITECTURE CONFIGURATION DOCUMENT & REVIEW 7
 - 7.3 TASK 3: ARCHIVE STORAGE CONFIGURATION 7
 - 7.4 TASK 4: SOFTWARE INSTALLATION 7
 - 7.4.1 Install CSLD Server 8
 - 7.4.2 Install CSLD Configuration and Jobs Notes Databases 8
 - 7.4.3 Create CSLD Tasks 8
 - 7.4.4 Install Sample Notes Mail Template (Optional) 8
 - 7.5 TASK 5: EXECUTE THE STANDARD TEST PLAN 8
 - 7.6 TASK 6: SYSTEM ADMINISTRATION HANDOFF 8
 - 7.6.1 Transfer of Information 8
 - 7.6.2 Routine Maintenance 9
 - 7.6.3 Review Backup Methodologies 9
 - 7.6.4 Problem Reporting 9
 - 7.7 TASK 7: DEMONSTRATE SYSTEM TO <IBM CUST> PROJECT TEAM 9
 - 7.8 TASK 8: 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 CommonStore for Lotus Domino (“CSLD”) Install Package

This service provides the expert resources to install the CSLD software at your site. It also provides hands-on assistance to address any 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 Consultant will help guide <IBM Cust> on proven strategies and procedures that have been employed by other successful ECM installations. The completed installation also ensures that the software is supportable by IBM's Support organization.

The scope of this Install Package is limited to the installation and support of CSLD¹.

This CSLD Install Service will provide:

- Review of <IBM Cust>'s platform/architecture environment
 - Provide/review CSLD Pre-Installation Questionnaire
 - Review standard test plan
 - Review standard rollout plan (Optional)²
- Install one (1) CommonStore server
 - Install I14C (CM only)
 - Configure one (1) backend archive³
 - Configure one (1) archive process (archpro)
 - Configure one (1) archive process service (Windows only)
- Install one (1) CSLD Configuration and one (1) CSLD Jobs Notes database
- Create up to three (3) CSLD Tasks
 - Automated Crawling/Archival
 - Interactive Archival
 - Searching/Retrieval
- Install sample CSLD Notes mail template for two (2) Notes clients (Optional)
 - Discuss end-user functionality (Interactive Archival, Searching/Retrieval)

¹ This service is limited to the installation of one (1) CSLD server and the Client Components on two (2) workstations (optional). Installation and configuration of any additional services other than those required as part of the installation of the CSLD are considered additional options. Pricing for any additional services will be as published in the current IBM price book or may be accommodated using a Statement of Work. Contact your Lab Services Sales Manager (“LS SM”) for options.

² The effort to create a custom rollout solution or assistance with a custom rollout is not included in this Package service. Contact your LS SM to outline the services necessary for this additional effort.

³ Select one of the following for the backend Archive: IBM Content Manager, IBM Content Manager OnDemand, or IBM Tivoli Storage Manager. Configuration for more than one Archive is considered out of scope for this service. Installation of an Archive solution is not within the scope of this Package service. Contact your LS SM for options.

- Execute the standard test plan
- System Administration Handoff
- Demonstrate the System to the <IBM Cust> Project Team
- Deliver project management and coordination

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 anticipated CSLD environment.

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

At the completion of the Install 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 ECM 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 Package.

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: IM820 - IBM DB2 CommonStore v8.3 for Lotus Domino

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 CSLD 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
- 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 CSLD System Administrator
- Lotus Domino Administrator
- Infrastructure Coordinator
- LAN 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.

IBM CSLD System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the CSLD system and will serve as the on-going administrator. Attending the IBM DB2 CommonStore v8.3 for Lotus Domino class is 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 CSLD software.

Lotus Domino Administrator (1 to 2 people) – This individual will work closely with the ECM Consultants during the configuration of Lotus Domino for CSX. These resources will provide technical insight into the current <IBM Cust> Domino system, as required, for the installation phase.

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/application of appropriate levels of patches to meet ECM's minimum requirements
 - Creation of a CSLD Windows ID that has administrator rights to the CSLD server.
 - Creation of a CSLD Notes ID that will have editor access to all mail/journal databases it will work against.
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download the CSLD 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 the CSLD system. The outcome of this process is a System Design Document.
- 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 for expanding 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 resources; including cubicles, desks, and telephone, hardware and Internet access service.
- 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

- Review <IBM Cust>'s CSLD Architecture

- Provide/Review CSLD Pre-Installation Questionnaire
- Review standard test plan⁴
- Review standard rollout plan (Optional)⁵
- Install one (1) CSLD server
 - Install II4C (CM only)
 - Configure one (1) archive process (archpro)
 - Configure one (1) of backend archive from the following list :
 - IBM Content Manager
 - IBM Content Manager OnDemand
 - IBM Tivoli Storage Manager
 - Configure one (1) archive process service (Windows only)
- Install one (1) CSLD Configuration and one (1) CSLD Jobs Notes database
- Configure up to three (3) CSLD Tasks
 - Automated Crawling/Archival
 - Interactive Archival
 - Searching/Retrieval
- Install the sample CSLD Notes mail template for two (2) Notes clients (Optional)
 - Discuss end-user functionality (Interactive Archival, Searching/Retrieval)
- Execute the standard test plan
- Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- Demonstrate the CSLD System to <IBM Cust> Project Team
- Provide <IBM Cust> a completed CSLD Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) Domino Servers & Notes clients already installed and working.
- b.) <IBM Cust> must have the selected Archive System (Tivoli Storage Manager, IBM Content Manager 8, or IBM Content Manager OnDemand) installed, tested and working as expected prior to the installation of the CSX software.

⁴ The effort to define and create a custom test plan is out of scope for this Package service. Please contact your LS SM to help scope this additional service if a custom test plan is desired.

⁵ The effort to define and create a custom rollout plan is out of scope for this Package service. Please contact your LS SM to help scope this additional service if a custom rollout plan is desired.

- c.) Installation of CSLD software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- d.) Additional resources and time for the development of “custom applications” are not included in this service.

6.2 Service Limitations

The CSLD 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 ECM Consultant will 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.

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 CSLD Install Project. 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 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 Project team 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 CSLD Pre-Installation Questionnaire.

ECM provides a standard test plan and standard rollout plan for CommonStore. The ECM Consultant will review both of these documents with <IBM Cust> CSLD System Administrator.⁶

7.3 Task 3: Archive Storage Configuration

Before installing the CSLD software, the ECM Consultant along with <IBM Cust>'s CSLD System Administrator will configure a backend Archive.

Content Manager 8

- Create a CM archive user ID
- Create attributes
- Create item types

Content Manager OnDemand

- Create a CMOD user for CommonStore
- Create a CMOD application group
- Create a CMOD application
- Configure the connection to a remote OnDemand server

Tivoli Storage Manager

- Register a TSM Node for CommonStore
- Create a TSM management class
- Activate the STANDARD policy set

7.4 Task 4: Software Installation

The ECM Consultant, with the assistance of <IBM Cust>'s CSLD System Administrator, 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.

A member of <IBM Cust>'s IT staff must have attended the required formal training prior to this step. This assures appropriate system configuration choices and eases support transition to <IBM Cust>.

⁶ The effort to define and create custom test and rollout plans is out of scope for this Install Package. Please contact your LS SM to help scope this additional service if a custom test or rollout plan is desired.

7.4.1 Install CSLD Server

Along with <IBM Cust>'s System Administrator, the ECM Consultant installs the CSLD Server software components.

This installation requires a CSLD Windows ID that has administration rights to the CSLD server, and a CSLD Notes ID that will have editor access to all Notes mail/journal databases it will work against.

The ECM Consultant will assist with the additional configuration required for Content Manager 8 if necessary.

7.4.2 Install CSLD Configuration and Jobs Notes Databases

The ECM Consultant, <IBM Cust>'s System Administrator, and <IBM Cust>'s Notes Administrator will review the deployment of the Lotus Notes databases required by CSLD. Once the details have been reviewed and agreed upon, the databases will be deployed to a Domino server specified by the customer.

7.4.3 Create CSLD Tasks

The CSLD Task is the interface between the Lotus Domino server and the CommonStore server. It processes all archiving, retrieval, and query jobs, including those that are triggered by automatic functions. The ECM Consultant and <IBM Cust>'s CSLD System Administrator will configure up to three (3) CSLD tasks.

If automated crawling/archival desired, the ECM Consultant and <IBM Cust>'s CSLD System Administrator will implement one (1) archival policy and an appropriate schedule (i.e. daily, weekly, monthly, etc) for the task crawler.

Creation of these tasks will reinforce formal training previously attended by the <IBM Cust>'s CSLD System Administrator, ensuring that he or she will be able to expand/modify CSLD task configuration to meet future needs.

7.4.4 Install Sample Notes Mail Template (Optional)

The ECM Consultant will discuss the end-user functionality gained by deploying CommonStore features (i.e. Interactive Archival, Searching/Retrieval) to Notes clients. Additional topics will include full-text indexing dependencies, and how these features will affect the number of tasks to be created. Based upon the outcome of this discussion, the team will determine if a sample Notes mail template including the CommonStore features should be deployed and implemented for two (2) Notes clients.

7.5 Task 5: Execute the Standard Test Plan

Once configured, testing will ensue to validate that the system is operational. The team will complete the standard test plan, as reviewed earlier, to validate product functionality. The <IBM Cust> Project Team members can use this phase as a learning process to ensure they understand the complete installation and testing process of the CSLD system.

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

The ECM Consultant will review the product 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 as required in this Install Package. Topics to be reviewed:

- Configuration of archival process (archpro)
- Configuration of CSLD configuration database
- Configuration of CSLD task
- CSLD performance tuning

7.6.2 Routine Maintenance

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

- Checking system services
- Monitoring system usage
- Backup configuration files
- Prune trace and log files

7.6.3 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.

7.6.4 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> CSLD 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).

7.7 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. Such as:

- Archiving and stubbing of email with and without Attachments
- Retrieve email into the Lotus Domino Server
- End-user functionality (Interactive Archival, Searching/Retrieval) (Optional)
- Viewing email using a Web Browser

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 *CommonStore for Lotus Domino Install 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.