IBM Customer

IBM FileNet Web Site Manager Install Package Service Description

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1. Description of Services

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

➢ IBM FileNet Web Site Manager ("WSM") Install Package

This service provides the expert resources to install the IBM FileNet Web Site Manager (WSM) software at your site. It also provides hands-on assistance to address any questions, recap key issues, and to confirm 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 IBM ECM Consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed at other successful IBM ECM installations. The completed installation also verifies that the software is supportable by IBM ECM's Product Support organization.

The scope of this Package is limited to the installation and base configuration of IBM ECM Web Site Manager. This 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 WSM environment.

- Review <IBM Cust>'s platform/architecture environment

- Install WSM Software

- Deliver System Administration Mentoring

    - Routine Maintenance

    - Backup Methodology

    - Problem Reporting

- Test WSM System

- Deliver project management and coordination

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

At the completion of the Web Site Manager 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 IBM 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.

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. IBM education required for this installation is as follows:

- Course Code: F887G – Introduction to IBM FileNet WSM

- Course Code: F901G – Advanced Author Training for IBM FileNet WSM

- Course Code: F902G – System Administration for IBM FileNet WSM

- Course Code: F903G – Developer Training for IBM FileNet WSM

The cost for these training courses is not included in this RC 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 IBM Software Sales Team can assist <IBM Cust> in obtaining a recommended training plan specific to <IBM Cust>'s requirements.

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

3. Resources

The <IBM Cust> Install Project Team will consist of the resources from the IBM ECM Account Team, the <IBM Cust> technical staff and, when applicable, an IBM ECM Business Partner. Examples of Project Team members are listed below.

3.1 IBM ECM Team Resources

The IBM ECM Project Lead coordinates the appropriate IBM ECM resources as required.

The IBM ECM Team typically includes the following members:

- IBM ECM Implementation Project Manager ("IPM") – Project Lead
- Lab Services IT Specialist ("IBM ECM Consultant")
- Technical Consultant ("TC")
- IBM ECM Sales Specialist
- IBM ECM Sales IT Specialist ("ECM Sales ITS")

3.2 <IBM Cust> Resources

<IBM Cust> must 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 IBM 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
- Web Master/Web Designer
- System Operations Coordinator
- Client Desktop Coordinator
- LAN Administrator
- Document Entry Supervisor

4.   Role Definitions

<IBM Cust> must 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 will necessarily be involved in this install.

Project Lead - This individual will represent <IBM Cust> resources and provide project coordination in conjunction with the IBM ECM Project Lead.

Technical Project Install Resource (1 to 2 people) - This individual will work closely with the IBM ECM Consultants during installation and configuration of the IBM FileNet software. The resources will provide technical insight into the current <IBM Cust> information systems, as required, for the installation phase.

IBM FileNet WSM System Administrator or Web Master/Web Designer (1 to 3 people) - This individual will learn the administration functions necessary to oversee the IBM FileNet WSM system, and will serve as the on-going administrator. IBM ECM strongly recommends that this individual become familiar with the administration of WSM by attending the WSM training. This individual will work closely with the IBM ECM Consultant during installation and configuration of the IBM FileNet software.

5.   Responsibilities

5.1   <IBM Cust> Responsibilities

In order to facilitate a successful installation, <IBM Cust> must provide:

a.) Prerequisites

- All prerequisites must be met before IBM ECM can begin the installation of the product.

- All hardware, software, and network configurations must meet IBM 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 IBM ECM's minimum requirements

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.) Local system administrator(s) trained on the administration of IBM ECM products installed at <IBM Cust>.

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

e.) Product Support Agreement in place through IBM ECM to provide for on-going maintenance post-installation.

f.) Adequate facilities for the IBM ECM Consultants; including cubicles, desks, and telephone, hardware and Internet access service.

g.) <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 delays and additional costs. These situations will be documented in a PCR.

5.2   IBM ECM Responsibilities

IBM ECM will provide the following activities.

a.) Review <IBM Cust>'s platform/architecture environment

b.) Install WSM [1]

- Author WSM Instance & Publish WSM Instance

- WSM Development Environment

- WSM Servlet Engine (or supported application server)

- Java Virtual Machine

- WSM Manager application

- WSM Documentation

c.) Deliver System Administration Mentoring

- Review Routine Maintenance

- Review Backup Methodology

- Review Problem Reporting

d.) Demonstrate WSM System

e.) Provide <IBM Cust> a completed Install Checklist

6.   Assumptions & Limitations

6.1   Assumptions

a.) <IBM Cust> should have attended the training required in this WSM Install package prior to the installation of any IBM ECM software.

b.) <IBM Cust> perform a network check (verify server connectivity to network, addressing, correct protocol).

c.) All prerequisite hardware and software has been installed onto <IBM Cust> designated IBM ECM servers.

d.) IBM FileNet WSM software has been downloaded to the appropriate servers prior to the resource arriving at <IBM Cust>'s site.

e.) Installation of the IBM FileNet WSM software will not be in a clustered environment. A chargeable PCR will be required to perform the installation in a clustered environment.

f.) IBM ECM does not assume responsibility for an improperly tuned system or inadequate system resources including, but not limited to, the following items, which are <IBM Cust> responsibilities.

- Acceptable network bandwidth

- Properly configured network infrastructure

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[1] Installation of the 4.1.1 P8 Connector is considered out of scope for this service and is additional effort. Contact your Lab Services Sales Manager for pricing.

- Adequate server memory and processing space

- Appropriate database design (keys and database caching)

- Appropriate disk caching algorithms

- Properly maintained and monitored system

g.) Additional resources and time for the development of "custom applications" are not included in this service.

6.2 Service Limitations

The following limitations apply:

a.) Repairs, corrections, or troubleshooting of the following are <IBM Cust>'s responsibility.

- Performance degradation.

- Data corruption, errors, or faults that are discovered due to hardware failures non-qualified hardware, or non-qualified operating systems.

Request for IBM ECM involvement will be charged on a Time and Materials (T&M) basis and documented in a PCR.

b.) 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 includes travel and living expenses incurred by IBM ECM resources traveling to <IBM Cust>'s site to fulfill IBM ECM's tasks and responsibilities.

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 IBM ECM Consultant will travel to <IBM Cust>'s site for **one** visit (up to 4 days) for tasks associated in delivering this implementation service.

Additional onsite assistance requested by <IBM Cust> beyond the amount specified in the above paragraph may be billable subject to the execution of a PCR. IBM ECM 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

7.1 Task 1: Kickoff Meeting

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

7.1.1 Review Project Services Description

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

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The Site Design Resource performing <IBM Cust>'s planned web site structure and creating <IBM Cust>'s Site Design Document must be part of the Project Team. This resource should have completed the required GLS WSM training.

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 ECM strongly encourages the practice of joint task assignments as an excellent means of training and knowledge transfer for the team members.

7.2   Task 2: Platform/Architecture Document & Review

The IPM will review the IBM FileNet software purchased, <IBM Cust>'s server configuration (hardware, operating system and site specific software), FileNet specific network configuration, and <IBM Cust>'s System Diagram. This review will encompass the items indicated in the document titled, "Platform/Architecture" that was delivered to the <IBM Cust> during the kickoff meeting. Upon successful completion of <IBM Cust> portion of the document, the IPM will then schedule the software installation at least 2 weeks into the future.

7.3   Task 3: Software Installation

The IBM ECM Consultant, with the assistance of <IBM Cust>'s Information Technology staff, schedules the server 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.

7.3.1   Installation on Application Server

WSM may be installed with the WSM Servlet Engine or on a supported application server. <IBM Cust>'s project team will need to determine which solution will be utilized during the install prior to the IBM ECM Consultant site visit. This is where the WSM Libraries and Web Applications will be installed.

7.3.2   WSM Installation

The IBM ECM Consultant can perform a Default or supported Custom WSM install based upon <IBM Cust>'s needs.

Once the installation has completed the IBM ECM Consultant will configure the environment with initial settings in order to validate that the WSM 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 WSM system.

7.3.2.1   *Default Installation*

The default installation is a basic installation which will install all of the WSM features:
- two WSM instances (Author and Publish),
- WSM Development Environment,
- WSM Servlet Engine
- Java Virtual Machine,
- WSM Manager application, and
- WSM documentation.

7.3.2.2 *Custom Installation*

The custom installation includes the components installed as part of the Default configuration listed above. Additionally, the custom installation can include a combination of the following FileNet/IBM CSS supported components:

- 3rd Party Application Server in replace of WSM out-of-the-box servlet engine
- customer-supplied 3rd party database in replace of WSM CRX repository
- customer-supplied 3rd part authentication provider (LDAP)

Please refer to the IBM ECM's Support Web site for detailed information on WSM supported configurations.

7.3.3 WSM System Validation

The IBM ECM Consultant validates that clients can access WSM. The following user functions will be validated:

- Start/Stop Day Processes
- Log on/log off Servlet Engine Administration
- Log on/log off Publishing Environment
- Log on/log off Authoring Environment
- Access Repository and Content Explorer
- Add/Delete a page
- Add/Create/Modify a user/group/role

7.4 Task 4: 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.

7.5 Task 5: System Administration Mentoring

7.5.1 Routine Maintenance

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

7.5.2 Backup Methodologies

The IBM ECM Consultant will review possible backup strategies with the <IBM Cust> System Administrator. This Install Package does not provide for the IBM ECM Consultant to analyze <IBM Cust>'s backup objectives nor does it develop the plan to meet those objectives.

7.5.3 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 IBM 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).

7.6   Task 6: Project Completion

Upon demonstration of the product the TC will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *Web Site Manager 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.