



IBM Customer ***IBM ECM Widgets Install
Package
Service Description***

January 1, 2011



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	4
5. RESPONSIBILITIES	4
5.1 <IBM CUST> RESPONSIBILITIES	4
5.2 IBM RESPONSIBILITIES.....	6
6. LIMITATIONS	7
6.1 SERVICE LIMITATIONS	7
6.1.1 Travel & Living Expenses	7
7. PROJECT TASKS & DELIVERABLES	8
7.1 TASK 1: KICKOFF MEETING	8
7.1.1 Review Project Services Description	8
7.1.2 Define and Review Project Plan	8
7.1.3 Project Status.....	8
7.2 TASK 2: ENVIRONMENT REVIEW.....	8
7.3 TASK 3: CONFIGURE P8 CM OR CM8 FOR ECM WIDGETS	8
7.4 TASK 4: ECM WIDGETS INSTALLATION	9
7.4.1 Install & Deploy either Business Space or Mashup Center	9
7.4.2 Deploy ECM Widgets and configure ECM Widgets for Business Space or Mashup Center.....	9
7.4.3 Install & Deploy ECM Widgets Documentation.....	9
7.4.4 Reconfigure and Redeploy Workplace XT.....	9
7.5 TASK 5: CONFIGURE ECM WIDGETS FOR SYSTEM VALIDATION	10
7.6 TASK 6: SYSTEM ADMINISTRATION HANDOFF	10
7.6.1 Transfer of Information.....	10
7.6.2 Routine Maintenance	10
7.6.3 Review Backup Methodologies	10
7.6.4 Problem Reporting	10
7.7 TASK 7: DEMONSTRATE SYSTEM TO <IBM CUST> PROJECT TEAM	10
7.8 TASK 8: SYSTEM CONFIGURATION DOCUMENT	11
7.9 TASK 9: PROJECT COMPLETION CHECKLIST.....	11

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1. Description of Services

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 ECM Widgets (ECM Widgets) Install Package

This service provides the expert resources to install the ECM Widgets software on a FileNet P8 (P8 CM) or Content Manager Enterprise Edition (CM8) system at your site. The Delivery Consultant will help guide <IBM Cust> on proven strategies and procedures that have been employed at other ECM installations. The completed installation also verifies that the software is supportable by IBM's Product Support organization.

The scope of the ECM Widgets Install Package is limited to the installation and a base configuration of ECM Widgets¹.

The ECM Widgets Install Package will:

- Review <IBM Cust>'s environment
 - Review the system topology
 - Review ECM Widgets Environment Prerequisite Checklist
 - Review fully functional P8 CM or CM8 system prior to install
 - For P8 CM: Content Engine, Process Engine, Workplace XT
 - For CM8: Library Server, Resource Manager and WEBi
- Configure P8 CM or CM8 for ECM Widgets
 - For P8 CM
 - The ECM Widgets application requires its own installation and/or instance of Workplace XT. It is strongly recommended that any production environment containing the ECM Widgets application have its own instance of Workplace XT. In non-production environments, a common instance of Workplace XT can be utilized as long as the prerequisites defined below are met.
 - Validate Workplace XT was deployed to the same WebSphere Application Server Profile to which ECM Widgets will be deployed
 - Process Engine Client with REST must be enabled (occurs during Process Engine Client Install)
 - Validate Workplace XT is configured for full SSL Support (ECM Widgets Requirement)
 - For CM8
 - The ECM Widgets application requires an instance of WEBi, either local or remote to the ECM Widgets application.
- Install ECM Widgets software
 - Install & Deploy either Business Space or Mashup Center²

¹ The ECM Widgets Install Package does not include installation of Workplace XT, DB2, or WebSphere Application Server. Installation and configuration of any additional services or servers other than those required as part of the installation of ECM Widgets are considered additional options. Contact your Software Services Sales Leader (SS SL) for pricing for any additional services.

- Deploy ECM Widgets on Business Space or Mashup Center (as selected)
 - Choose ECM Widgets for P8 CM or CM8 to be configured within Business Space or Mashup Center
- Install & Deploy ECM Widgets Documentation (not necessary if using IBM Information Center)
- Install, Configure, & Deploy ECM Widgets
- Reconfigure, Redeploy Workplace XT (P8 CM only)
- Configure ECM Widgets system for initial validation
- Deliver System Administration Hand off
- Demonstrate of the ECM Widgets system to the Project Team
- Deliver the System Configuration Document
- Project management and coordination to facilitate a professional project delivery

This install package includes a set of tasks that <IBM Cust> must complete to facilitate 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 CM environment.

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

At the completion of the ECM Widgets 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 that individuals knowledgeable on ECM products will perform 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 package.

Any change in the scope of work defined in this Service 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 complete (or have previously completed) the following IBM training. The IBM education required for this installation is as follows:

- If P8 CM - Course Code: F1440 – BPM Platform Administration
- If CM8 - Course Code: IM520 - IBM DB2 Content Manager System Administration V8.4

IBM may offer an equivalent Instructor Led Online (ILO) or Self Paced Virtual Course (SPVC). Any of these courses will satisfy this installation package training requirement.

Existing courses in the course catalog may still have previously used product names. New versions of these courses may be available in the future with course numbers that are different from the ones listed above.

² This installation of Mashup Center will not be in a highly available environment. A chargeable PCR is required to perform the installation of ECM Widgets in a highly available environment. Contact your Software Services Sales Leader.

The cost for these training courses is not included in this ECM Widgets 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:

- Project Manager (PM) – Project Lead
- IT Consulting Specialist (Delivery Consultant)
- Software Sales Representative(SSR)
- Sales IT Specialist (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
- P8 CM or CM8 System Administrator
- WebSphere Application Server Administrator
- LDAP Administrator
- Server Administrator
- System Operations Coordinator

- LAN Administrator
- DB2 or Oracle Database Administrator
- 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.

P8 CM or CM8 System Administrator (1 to 3 people) - This individual performs the administration functions necessary to oversee the P8 CM or CM8 system. Attending the FileNet P8 BPM Platform Administration or CM8 Administration class is required and should be completed prior to the installation of the software. This individual will work closely with the Delivery Consultant during installation and configuration of ECM Widgets software.

Server Administrator (1 person) - This individual will assume responsibility for <IBM Cust>'s servers. This individual will also provide proper access to allow the Delivery Consultant to perform his/her functions on the server and will ensure that the appropriate prerequisite software will be installed on the system by the <IBM Cust>'s resources.

WebSphere Application Server Administrator (1 person) - This individual will assume responsibility for <IBM Cust>'s WebSphere Application Server. This individual will also provide proper access to allow the Delivery Consultant to perform his/her functions in the course of the installation when access to the WebSphere Application Server is required.

LDAP Administrator (1 person) - This individual will work closely with the Delivery Consultant during the execution of the Widget server installation providing the appropriate LDAP server specific information for connection, container structures, base realms, user and group creations and memberships, passwords and other details as needed. This resource will also provide technical insight into the current <IBM Cust> environment, as required, for the installation phase.

DB2 or Oracle Database Administrator (1 person) - This individual will assume responsibility for <IBM Cust>'s DB2 or Oracle database. This individual will also provide proper passwords to allow the Delivery Consultant to perform his/her 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 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 supported Operating System for ECM Widgets server

- Installation of the customer-supplied DB2 or Oracle database³
 - Installation of the customer-supplied WebSphere Application Server (Stand alone or Network Deployment)⁴
 - Installation of IBM Installation Manager, if Business Space is to be used.
 - Installation and/or application of appropriate levels of patches to meet ECM Widgets minimum requirements
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download the ECM Widgets software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
 - Installation & deployment of Workplace XT with full SSL support and Process Engine Client REST enabled.⁵ (P8 only)
 - Installation of WEBi (CM8 only and requires 32 bit)⁶
 - Complete the *Environment Prerequisite Checklist*.
- b.) <IBM Cust> acknowledges that:
- i. If using WebSphere Application Server Network Deployment, the cell profile must be created using a "Management Profile Template". A WebSphere Application Server Network Deployment cell created with a "Cell Profile Template" cannot be used.
 - ii. Installation of the ECM Widget software will not be in a highly available environment. A chargeable PCR will be required to perform the installation in a highly available environment.
 - iii. IBM FileNet Content Manager (P8 CM) or IBM Content Manager Enterprise Edition (CM8) must already be installed, configured, and fully operational prior to the commencement of this package.
 - iv. Configuration for Single Sign-on (SSO) or "server hardening" is not included in this package. A chargeable PCR will be required to perform these additional efforts in each environment.
 - v. Additional resources and time for the development of "custom applications" are not included in this service.
- c.) 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
- d.) Local system administrator(s) trained on the administration of the ECM products previously installed.
- e.) Adequate facilities for each Delivery Consultant including:
- cubicle, desk, telephone, and Internet access,
 - remote access (e.g. VPN access)
 - computer with direct access to the keyboard.
- f.) When performing remote work, <IBM Cust> will allow remote access (e.g. customer-supplied VPN or IBM remote web tool) into <IBM Cust>'s network and remote access to a workstation in the network that:

³ IBM can assist <IBM Cust> in installing DB2 specifically for the ECM Widgets installation if needed on a Time-and-Materials basis. Contact your Software Services Sales Leader for pricing for any additional services.

⁴ WebSphere Application Server 7.0.0.9 Fix Pack 9 and WebSphere Application Server SDK 7.0.0.9 Fix Pack 9 must be installed and configured in IBM Install Manager 1.3.3 or higher.

⁵ Installation of Workplace XT and configuration of the Process Engine Client REST is not included in this package. IBM can assist <IBM Cust> in executing these efforts if needed on a Time-and-Materials basis. Contact your Software Services Sales Leader for pricing for any additional services.

⁶ Installation of WEBi is not included in this Install Package. IBM can assist <IBM Cust> in executing these efforts if needed on a Time-and-Materials basis. Contact your Software Services Sales Leader for pricing for any additional services.

- can connect to all required servers and
 - is pre-loaded with all required connectivity tools appropriate to <IBM Cust>'s environment.
- g.) Product Subscription and Support Agreement in place through IBM.
- h.) <IBM Cust> will make available all <IBM Cust> personnel required for this project based on the agreed-upon project schedule. 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 a chargeable PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2 IBM Responsibilities

The IBM responsibilities for this package are:

- a.) Review Environment
- Deliver & Review Environment Prerequisite Checklist
 - Review system topology
 - Review fully functional P8 CM or CM8 system prior to install
 - For P8 CM: Content Engine, Process Engine, Workplace XT
 - For CM8: Library Server, Resource Manager and WEBi
 - Validate Workplace XT was deployed to the same WebSphere Application Server Profile to which ECM Widgets will be deployed (P8 CM only)
 - Confirm Process Engine Client with REST was installed during PE Client installation for Workplace XT (P8 CM only)
 - Validate Workplace XT is configured for full SSL Support (P8 CM only)
- b.) Configure P8 CM or CM8 for ECM Widgets
- For P8 CM
 - The ECM Widgets application requires its own installation and/or instance of Workplace XT. It is strongly recommended that any production environment containing the ECM Widgets application have its own instance of Workplace XT. In non-production environments, a common instance of Workplace XT can be utilized as long as the prerequisites defined below are met.
 - 1) Validate Workplace XT was deployed to the same WebSphere Application Server Profile to which ECM Widgets will be deployed
 - i. Process Engine Client with REST must be enabled (occurs during Process Engine Client Install)
 - 2) Validate Workplace XT is configured for full SSL Support (ECM Widgets Requirement)
 - For CM8
 - The ECM Widgets application requires an instance of WEBi, either local or remote to the ECM Widgets application.
- c.) Install ECM Widgets Software
- Install & Deploy either Business Space or Mashup Center⁷
 - Deploy ECM Widgets on Business Space or Mashup Center (as selected)

⁷ This installation of Mashup Center will not be in a highly available environment. A chargeable PCR is required to perform the installation of ECM Widgets in a highly available environment. Contact your Software Services Sales Leader.

- Choose ECM Widgets for P8 CM or CM8 to be configured within Business Space or Mashup Center
 - Install & Deploy ECM Widgets Documentation (not necessary if using IBM Information Center)
 - Install, Configure, & Deploy ECM Widgets
 - Reconfigure, Redeploy Workplace XT (P8 CM only)
- d.) Configure ECM Widgets for initial validation
- i.) Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- j.) Demonstrate the Widget System to <IBM Cust> Project Team
- k.) Deliver System Configuration Document
- l.) Provide <IBM Cust> a completed ECM Widgets Install Completion Checklist

6. Limitations

6.1 Service Limitations

The ECM Widgets 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.

6.1.1 Travel & Living Expenses

This package does **not** include 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 service.

The Delivery Consultant may travel to <IBM Cust>'s site for **one** (1) visit for tasks associated with delivering this service. It is intended that status meetings will be held via conference calls. <IBM Cust> will be billed actual travel and living costs.

IBM will invoice <IBM Cust> for travel and living expenses and other reasonable expenses incurred in connection with the package delivery. Amounts are due upon receipt of invoice and payable within 30 days. <IBM Cust> agrees to pay accordingly, including any late payment fee. <IBM Cust> does not have to pay any amount disputed in good faith while it is being investigated, but <IBM Cust> remains obligated to pay any amount not in dispute.

Additional on-site assistance requested by <IBM Cust> beyond the number of visits indicated above will 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 ECM Widgets Install Package 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, the PM, will review the package Service Description, the installation tasks, and roles and responsibilities with <IBM Cust>'s Project Team.

7.1.2 Define and Review Project Plan

Once selected, the joint <IBM Cust> and IBM Project Team customizes the sample project plan defining mutually agreed-upon dates for delivery (see Sample Project Plan). 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 PM 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: Environment Review

The PM and Delivery Consultant will review the

- ECM software purchased,
- <IBM Cust>'s server configuration (hardware, operating system and site specific software),
- ECM-specific network configuration,
- <IBM Cust>'s System Diagram, and
- Additional details as indicated in 5.1 <IBM Cust>'s Responsibilities.

This review will encompass the items indicated in the *Environment Prerequisite Checklist* that is delivered to <IBM Cust>. Upon completion of <IBM Cust>'s portion of the document, the PM will schedule the software installation.

ECM recommends reviewing any questions arising from the completion of the *Environment Prerequisite Checklist* during the weekly status calls.

7.3 Task 3: Configure P8 CM or CM8 for ECM Widgets

The Delivery Consultant, with the assistance of <IBM Cust>'s P8 CM or CM8 Administrator will configure the content repository for the ECM Widget installation.

For P8 CM:

The ECM Widgets application requires its own installation and/or instance of Workplace XT. It is strongly recommended that any production environment containing the ECM Widgets application have its own instance of Workplace XT. In non-production environments, a common instance of Workplace XT can be utilized as long as the prerequisites defined below are met.

- Validate Workplace XT was deployed to the same WebSphere Application Server Profile to which ECM Widgets will be deployed
 - Process Engine Client with REST must be enabled (occurs during Process Engine Client Install)
- Validate Workplace XT is configured for full SSL Support (ECM Widgets Requirement)

For CM8:

The ECM Widgets application requires an instance of WEBi, either local or remote to the ECM Widgets application.

7.4 Task 4: ECM Widgets Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s Information Technology (IT) staff, will schedule the server software installation. <IBM Cust>'s IT 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 software installation.

A member of <IBM Cust>'s IT staff must have attended the FileNet P8 BPM Platform Administration or CM8 Administration training prior to this step to facilitate appropriate system configuration choices and ease support transition to <IBM Cust>.

7.4.1 Install & Deploy either Business Space or Mashup Center

Business Space or Mashup Center is required for ECM Widgets. IBM ECM Widgets can utilize an existing Business Space or Mashup Center or a new instance of Business Space or Mashup Center can be installed as part of this package.

7.4.2 Deploy ECM Widgets and configure ECM Widgets for Business Space or Mashup Center

Once ECM Widgets has been deployed in WebSphere, it is then configured in either Business Space or Mashup Center for P8 CM or CM8.

7.4.3 Install & Deploy ECM Widgets Documentation

Because ECM Widgets is an expansion product, the associated ECM Widgets documentation must be added to an existing installation of the IBM FileNet P8 Platform Help. This step is not needed if using IBM Information Center.

7.4.4 Reconfigure and Redeploy Workplace XT

If deploying in a Network Deployed WebSphere Application Server, the Delivery Consultant will reconfigure and redeploy Workplace XT to ensure that additional ECM Widgets parameters have been included within the Workplace XT application.

7.5 Task 5: Configure ECM Widgets for System validation

The Delivery Consultant will create a sample space and step processor page in Business Space or Mashup Center. Once created, the Process Designer will be updated by registering the space pages and defining roles, in-baskets, and application spaces. At that point, the Delivery Consultant will test a sample BPM application in Business Space or Mashup Center.

The <IBM Cust> Project Team members are encouraged to participate in this effort to learn about the basic setup, modification, and testing of the ECM Widgets application.

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

The Delivery Consultant will review Widgets with the <IBM Cust> System Administrator to better prepare <IBM Cust> for further expansion of the system. The Delivery Consultant will reinforce topics covered during the installation and in any of the Learning Services courses required for this package.

7.6.2 Routine Maintenance

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

7.6.3 Review Backup Methodologies

The Delivery Consultant will review possible basic backup strategies with the <IBM Cust> System Administrator. This package does not provide for the Delivery 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 Delivery 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 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 1-800-426-7378 or 1-800-IBM-SERV.

7.7 Task 7: Demonstrate System to <IBM Cust> Project Team

After the initial samples have been tested, IBM will demonstrate the CM system 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: System Configuration Document

As <IBM Cust> tests the system, the Delivery Consultant will provide <IBM Cust> the completed System Configuration Document, which includes the <IBM Cust>-supplied data as well as the installed ECM software versions and patches. This document represents a starting point for ongoing maintenance and modification of the system.

7.9 Task 9: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *IBM ECM Widgets Install Completion Checklist*.

If issues arise after delivery of the Project Completion Checklist, <IBM Cust> should contact IBM Customer Support by using the IBM toll free Customer Service telephone number 1-800-426-7378 or 1-800-IBM-SERV.