



IBM Customer ***IBM Content Manager
Enterprise Edition Install
Package
Service Description***

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1. Description of Services

Information Management Analytics & Optimization (IMAO) is pleased to submit this Service Description to IBM Customer (<IBM Cust>). <IBM Cust> has requested the following services from IBM:

- IBM Content Manager Enterprise Edition (Linux, UNIX, or Windows) Install Package (CM8 Install Package)

This service provides the expert resources to install the CM8 software at your site. It also provides hands-on assistance to address questions, recap key issues covered in formal training classes, 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 Delivery consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed at other Enterprise Content Management (ECM) installs. The completed install also verifies that the software is supportable by IBM's Support organization.

The scope of this Install Package is limited to the install and base configuration of CM8¹.

This CM8 Installation Service will provide:

- Review <IBM Cust>'s environment
- Install the following components:²
 - One Information Integrator for Content (II4C)
 - One Limited Content Manager Environment
 - One CM Windows Client (thick Client)
 - One CM Windows Admin Client
 - One eClient or WEBi Client install
- Configure Sample Environment for Testing
- Deliver System Administration Handoff
- Demonstrate the System to the Project Team
- 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 a 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 CM8 environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel that are required to install and configure the CM8 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 IBM products will be performing the tasks to identify the

¹ This service is limited to the installation and base configuration of one Content Manager Enterprise Edition environment consisting of one Library Server and one Resource Manager Server. Installation and configuration of any additional services or products other than those required as part of the installation of CM8 software are considered additional options. Contact your local Lab Services Sales Manager (LS SM) for pricing on any additional install services.

² This effort does not include the installation of a required database or WebSphere Application Server. IBM can provide the installation of limited editions of DB2 and WebSphere Application Server if needed. Contact your local Lab Services Sales Manager (LS SM) for pricing on any additional install services.

<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 Package³.

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 complete (or have completed) the following IBM training. The IBM education required for this installation is as follows:

- Course Code: IM520 - IBM DB2 Content Manager System Administration V8.4

Please note that 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.

The cost for these training courses is not included in this CM8 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 IMAO Software Services Account Team, the <IBM Cust> technical staff and, when applicable, an IBM Business Partner. Examples of Project Team members are listed below.

3.1 IMAO Software Services Team Resources

The IMAO Software Services Project Lead coordinates the appropriate IMAO Software Services resources as required.

The IMAO Software Services Team typically includes the following members:

- Solution Implementation Project Manager (SIM) – typical IBM Project Lead
- Lab Services IT Specialist (Delivery Consultant)

³ Services to configure all site and user specific preferences can be accommodated by using CM8 Launch services. Contact your LS SM for options.

- Field Delivery Consultant (FDC)
- 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 IMAO Software Services Project Lead.

Depending upon, the project the <IBM Cust> Project Team may include any of the following members:

- Project Lead
- IBM CM8 System Administrator
- Windows and/or Unix Administrator (as necessary)
- Websphere Administrator
- LDAP Server Administrator
- Infrastructure Coordinator
- LAN Administrator
- DBA 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 install. Likewise, not all of the individuals will necessarily be involved in this Install & Launch.

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

CM8 System Administrator or Web Master Web Designer (1 to 3 people) - This individual will learn the administration functions necessary to oversee CM8 and will serve as the on-going administrator. Attending the designated training for this package is required and must be completed prior to the installation of the software. This individual will work closely with the Delivery Consultants during installation and configuration of the IBM server and clients.

Websphere Administrator (1 to 2 people) – This individual will work closely with the Delivery Consultants during the execution of the Websphere Application Server & HTTP Server installation for CM8. These resources will provide technical insight into the current <IBM Cust> environment, as required, for the installation phase.

DBA (1 person) - This individual will assume responsibility for installation and management <IBM Cust>'s database. This individual will also provide proper passwords to allow the Delivery Consultant to perform his and/or her functions in the course of the CM8 installation when access to the database is required.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate the installation, <IBM Cust> has the responsibility to provide the following:

- a.) Prerequisites
 - All prerequisites must be met before IBM can begin the installation of the product.
 - Hardware, software, and network configurations that meet ECM requirements for system size and performance for the purchased software. This includes:
 - Installation of the operating systems
 - Installation of a supported version of Oracle or DB2⁴ & client for CM8
 - Installation of a supported version of WebSphere Application Server⁵
 - Installation of a supported LDAP solution and Client for CM8
 - Installation of a supported web browser for CM8 eClient
 - Installation and application of appropriate levels of patches to meet ECM's minimum requirements
 - All prerequisite hardware and software have been installed onto <IBM Cust>'s designated server(s).
 - Network check (verify server connectivity to network, addressing, correct protocol).
 - Have attended the required training prior to the installation of any ECM software.
 - Download the latest version of CM8 to <IBM Cust>'s environment.
 - Complete the *Environment Prerequisite Checklist*.
- 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 gathering of business application rules, business application processes, and application security access as they pertain to the implementation of CM8.
- d.) Local system administrator(s) trained on the administration of ECM products to be installed, CM8.
- e.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the Delivery Consultant during the installation, he or she will be responsible for expanding the CM8 configuration such as:
 - Data types
 - Item Types
 - Users
 - Security
- f.) Product Subscription and Support Agreement in place through IBM.

⁴ IBM can provide the installation of a limited edition of DB2 if needed. Contact your local Lab Services Sales Manager (LSSM) for pricing on any additional install services.

⁵ IBM can provide the installation of a limited edition of WebSphere Application Server if needed. Contact your local Lab Services Sales Manager (LS SM) for pricing on any additional install services.

- g.) Adequate facilities for the Delivery Consultants; including cubicles, desks, and telephone, hardware and Internet access service, and remote access (e.g. VPN).
- h.) <IBM Cust> will make available all <IBM Cust> personnel required for this project based upon the agreed on 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 Project Change Request addressing additional or extended IBM personnel requirements and additional costs. Specifically, AD & Exchange Resources.

5.2 IBM Responsibilities

- a.) Review <IBM Cust>'s CM8 Environment
 - Deliver & Review *Environment Prerequisite Checklist*
- b.) Provide CM8 Install Questionnaire
- c.) Install
 - One Information Integrator for Content (II4C)
 - One Limited Content Manager Environment
 - one Library Server
 - one Resource Manager Server
 - One CM Windows Client (thick Client)
 - One CM Windows Admin Client
 - One eClient or WEBi Client install
- d.) Configure CM8 for Sample Environment
 - One sample item type
 - Five sample attributes
 - Three sample user group definitions
 - One sample workflow of Content Manager Document Routing (up to five steps)
- e.) Test environment
- f.) Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- g.) Demonstrate Product to the Project Team
- h.) Provide <IBM Cust> a completed CM8 Installation Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) The Installation and implementation of Tivoli Storage Manager is not included in the scope of this Install Package service.

- b.) CM8 business-specific configuration is outside the scope of this Install Package.⁶
- c.) A limited number of documents (10 documents) will be loaded into the system for testing purposes only.
- d.) Installation of <IBM Cust>'s CM8 software will not be in a clustered or High Availability environment. A chargeable PCR will be required to perform the installation in these types of environments.
- e.) Installation or configuration of Text Search capability is not included in this package. A chargeable PCR will be required to install and configure this feature.
- f.) Additional resources and time for the development of "custom applications" are not included in this Install Package.

6.2 Service Limitations

The CM8 Install Package does not include repairs, corrections or troubleshooting of performance degradation, data corruption, errors and faults that are discovered during the installation 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.

IMAO Software Services 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 Package does not include travel and living expenses incurred by IBM 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 in delivering this service. <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. Payment is due upon receipt of invoice. <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.

⁶ Services to configure all site and user specific preferences can be accommodated by using CM8 Launch services. Contact your LS SM for options.

7.1 Task 1: Kickoff Meeting

The purpose of this meeting is to prepare both the <IBM Cust> team and the IMAO Software Services team for the CM8 Install Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The IMAO Software Services Project Lead will review the Install Package Service Description, the install tasks, and roles and responsibilities with <IBM Cust>'s Project Team.

7.1.2 Define and Review Project Plan

Once selected, the joining <IBM Cust> and IMAO project team develops a project plan that best fits <IBM Cust>'s installation needs (see the 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

SIM 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 IBM SIM & Consultant 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 *Environment Prerequisite Checklist* that was delivered to <IBM Cust>. Upon completion of <IBM Cust>'s portion of this document, the SIM will schedule the software installation.

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

7.3 Task 3: Software Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s CM8 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 software installation.

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

7.3.1 Deploy WebSphere Applications

CM8 requires 2 host applications to be deployed to the WebSphere Application Server:

- Content Manager Resource Manager application (icmrm) and
- CM8 eClient Web application *or* WEBi.

7.3.2 Database Applications

DB2 UDB or Oracle will be needed to host two Content Manager Databases:

- Content Manager Library Server database
- Content Manager Resource Manager database

7.3.3 Install Information Integrator for Content (II4C)

Information Integrator for Content (II4C) will be installed and configured to connect to Content Manager v8 and provide Java libraries for implementation of either the Content Manager eClient or WEBi

7.3.4 Install Limited Content Manager Environment

The Content Manager Library Server is a database application composed of stored procedures. The Content Manager Resource Manager manages object storage and is composed of a Web Application and RM database.

7.3.5 Configure for Sample Environment

Upon completion of the installation, the Delivery Consultant along with <IBM Cust>'s System Administrator will configure Content Manager using Content Manager Administration Interface for a sample environment implementing:

- One sample item type
- Five sample attribute
- Three sample user group definitions
- One sample workflow of Content Manager Document Routing (up to five steps)

7.3.6 Test

Once configured, testing will ensue to validate that the 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 CM8 system.

7.4 Task 4: System Administration Handoff

7.4.1 Transfer of Information

The Delivery Consultant will review the product with the <IBM Cust> System Administrator to better prepare <IBM Cust> for further expansion of the system. The Delivery Consultant will reinforce topics covered in the Learning Services courses as required in this Install Package. Topics to be reviewed:

- Start and stop and Management of Content Manager system services
 - Content Manager Resource Manager
 - Content Manager eClient or WEBi

7.4.2 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:

- Backup and restore
- Review documentation and point available best practice for system maintenance

7.4.3 Review Backup Methodologies

The Delivery Consultant will review possible backup strategies with the <IBM Cust> System Administrator. This Install 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

7.4.4 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> CM8 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).

7.5 Task 5: 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:

- Import document
- Search document
- Retrieve, launch and view a document
- Create folder
- Export a document
- Execute simple workflow

7.6 Task 6: 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 *Content Manager Enterprise Edition 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 (1-800-429-7378).