



IBM Customer ***Content Manager for z/OS***
Install Package
Service Description

January 1, 2010

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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 for z/OS (CM for zOS) Install Package

This service provides the expert resources to install the CM 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 Delivery Consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed at other Enterprise Content Management (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 assistance with installation and support of CM for z/OS single test or development environment¹.

This CM Install Service will provide:

- Review <IBM Cust>'s environment
- On-Site Technical Planning
- Environment Preparation
- Subsystem Enablement
- Installation to include:
 - Install Library Server & Resource Manager
 - Define DB2 Data structures
 - Define Library Server & Resource Manager CICS resources
 - Load Sample Index Class
 - Load CM Administration Client & User client
 - Create Network Control table & Connect Clients to Host
 - Perform Base Function Tests
- System Handoff
 - SMS and OAM Transfer
 - Transfer of Information
 - Problem Reporting
- Demonstrate the System to the Project Team
- Project management and coordination to facilitate a professional project delivery

¹ This service is limited to the installation and configuration of (1.) Library Manager, (2.) Resource Manager, (3.) CM GUI client. Installation and configuration of any additional services other than those required as part of the installation of the CM are considered additional options. Pricing for any additional services will be as published in the current IBM price book or may be accommodated through a Statement of Work. Contact your Lab Services Sales Manager (LS SM) for options.

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 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 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 <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 Package².

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: IM401 – IBM DB2 Content Manager V8 Implementation & Administration

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 CM for z/OS 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.

² Services to configure all site and user specific preferences can be accommodated through a Statement of Work. Contact your LS SM for options.

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) – Project Lead
- Lab Services IT Specialist (Delivery Consultant)
- 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 roles:

- Project Lead
- IBM CM System Administrator
- z/OS Database Administrator
- z/OS Systems Programmer
- z/OS Security Administrator
- z/OS Storage Administrator
- LAN and/or Workstation 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 IMAO Software Services Project Lead.

System Administrator (1 to 3 people) - These individuals will learn the administration functions necessary to oversee CM and will serve as the on-going administrator for the system. 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 CM software.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

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

- a.) Project Prerequisites
 - All prerequisites must be met before IBM can begin the installation of the product.
 - All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software. This includes:
 - Installation of the operating system
 - Installation of the customer-supplied database
 - Installation and application of appropriate levels of patches to meet ECM's minimum requirements
 - All prerequisite hardware and software has been installed onto <IBM Cust>'s designated ECM servers.
 - Have attended the required training prior to the installation of any ECM software.
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download IBM Content Manager 8 for z/OS to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
 - 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 installation of the CM system.
- 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 Delivery Consultant during the installation, he or she will be responsible for expanding the configuration post-installation.
- f.) Local help desk personnel trained on the ECM client products to be installed at <IBM Cust>.
- g.) Adequate facilities for the IMAO Software Services resources; including cubicles, desks, and telephone, hardware and Internet access service. For the on-site Technical Planning session <IBM Cust> will provide:
 - a meeting room sized to accommodate Delivery Consultants and <IBM Cust> staff,
 - a PC projector,
 - a flip chart or white board, and
 - general assistance to support this on-site meeting.
- h.) Product Subscription and Support Agreement in place through IBM.
- i.) <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

- a.) Project Management Responsibilities
- b.) Review <IBM Cust>'s Environment
 - Deliver & Review *Environment Prerequisite Checklist*
- c.) On-Site Technical Planning
 - Detailed Project Plan
 - Prerequisite Validation
- d.) Environment Preparation
 - Configuration Assistance for:
 - CICS
 - DB2
 - SMS and/or OAM
 - TCP/IP
 - USS
- e.) Subsystem Enablement
 - Configure & Initialize Storage Hierarchy
- f.) Installation
 - Install Library Server & Resource Manager
 - Define DB2 Data structures
 - Define Library Server & Resource Manager CICS resources
 - Load Sample Index Class
 - Load CM Administration Client & User client
 - Create Network Control table & Connect Clients to Host
 - Create no more than (ten) 10 index classes, twenty (20) key fields, five (5) users, five (5) workbaskets, and five (5) five-step workflows. No complex workflow will be designed or delivered.
 - Perform Base Function Tests
- g.) Perform System Handoff
 - System Administration Transition
 - SMS and/or OAM Transition
 - Problem Reporting
- h.) Demonstrate Product to the Project Team
- i.) Provide <IBM Cust> a completed CM for z/OS Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) Implementation of the Content Manager 8 for z/OS and OD/zOS Version 7 software will be delivered in a single test environment on <IBM Cust>'s system.
- b.) Installation of IBM Content Manager 8 for z/OS software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- c.) Additional resources and time for the development of "custom applications" are not included in this service.

6.2 Service Limitations

The CM for z/OS 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.

Delivery 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 domestic travel and living expenses incurred by IMAO Software Services 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 **three (3)** visit for tasks associated with 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. <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 IMAO Software Services team for the CM for z/OS 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 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 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 SIM 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.

Agenda:

- OD/zOS Project Management
- Environment Preparation
- Subsystem Customization
- Content Manager Server Software Installation
- System Administration

7.3 Task 3: Environment Preparation

The Delivery Consultant along with <IBM Cust>'s appropriate administrators will enable the subsystems and interfaces required by CM. The prerequisite software products must be installed and operational. Activities to include:

- Verify availability of proper levels of prerequisite zOS or OD/zOS server software
- Enable subsystem interfaces for:
 - a. DFSMS
 - b. USS/DB2
 - c. USS/OAM

7.4 Task 4: Subsystem Enablement

The purpose of this task is to customize host based software required by the CM service offering. The task addresses the customization of CM sample files, OAM, SMS, and DB2 to meet <IBM Cust>'s unique requirements as defined in your SMS Storage Hierarchy Design analysis. To support your subsystem customization effort, sub-tasks are:

- Customize OAM/SMS
 - Define optical and/or tape configuration
 - Define OAM DB2 data structures
 - Define SMS resources
 - Create SMS constructs
 - Customize ACS routines
- Customize DB2
 - Analyze storage requirements
 - Define Databases to include:
 - OAM storage groups
 - OAM administrative database
 - Optical configuration database
 - Customize DB2 Resource Control Tables
- Modify USS Installation Parameters
 - Define OAM USS tables
 - Customize Installation Parameters

7.5 Task 5: Installation

The purpose of this task is to complete the required steps to install the CM for z/OS software and properly configure the related sub-systems to support that installation. Sub-tasks include:

- Install Library Server & Resource Manager
- Define DB2 Data Structures
- Define Library Server & Resource Manager CICS
- Load Sample Index Class
- Load CM Administration Client & User Client
- Create Network Control Table & Connect Clients to Host

7.5.1 Test Environment

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 CM system.

7.6 Task 6: System Handoff

7.6.1 System Administration Transition

- Facilitate a review of Content Manager System Administration
- Provide tips and techniques for System Administration

7.6.2 SMS and/or OAM Transition

The DELIVERY Consultant will deliver an overview of how Content Manager interfaces with Object Access Method (OAM) and how OAM manages the data archived in Content Manager.

- Understanding Storage Management System (SMS) and OAM components required
 - Collection Name
 - Object Name
 - Storage Group
 - Storage Class
 - Management Class
- Understanding the Object Storage Management Component (OSMC) requirements
 - Object Backup
 - Object Transition
 - Object Expiration
- OAM Recovery
 - Single Object
 - Tape or Optical volume
 - Database
 - Collection Name
- OAM DB2 Databases
 - OAM Object Database
 - OAM Optical Configuration Database
 - Object Administration Database

7.6.3 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 Delivery Consultant will review troubleshooting and problem reporting procedures and provide a trouble report template to <IBM Cust>. Over time the <IBM Cust> CM 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:

7.8 Task 8: Project Completion Checklist

Upon completion of the Package, the Delivery Consultants will deliver to <IBM Cust> a completed Content Manager for z/OS Install Checklist which constitutes completion of this project. Please refer to the *Content Manager for z/OS 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).