



***IBM Customer*** ***IBM Document Manager***  
***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 Document Manager (Document Manager) Install Package

This service provides the expert resources to install the Document Manager software at your site. It also provides hands-on assistance to address 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 by 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 installation and support of Document Manager <sup>1</sup>.

This Document Manager Install Service will provide:

- Review <IBM Cust>'s environment
- Document Analysis for Document Manager Initial Configuration Document
- Install
  - Document Manager Server on one (1) Windows server
  - Document Manager Designer on one (1) workstation
  - Deploy Document Manager Desktop on one (1) web browser
    - Integrate with Microsoft Office
- Configure
  - Document Manager to connect to existing Content Manager (CM) environment
  - Up to two Document Classes
  - Up to ten Properties
  - Up to two User Groups & Views
  - Up to two Roles
  - Up to five User ID's
- Test the environment
- 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 Document Manager environment.

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<sup>1</sup> This service is limited to the installation or configuration of (1.) One Document Manager server and (2.) One Document Manager client. Installation and configuration of any additional services other than those required as part of the installation of Document Manager are considered additional options. Contact your Lab Services Sales Manager (LS SM) for pricing.

The resources required for this project will include both the IBM and <IBM Cust> personnel that are required to install and configure the Document Manager 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 Package<sup>2</sup>.

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. IBM education required for this installation is as follows:

- Course Code: DM470 - An Introduction to IBM DB2 Document Manager V8 Implementation & Administration
- Course Code: DM490 - IBM DB2 Document Manager V8 System Services Configuration & 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 Document Manager 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](mailto:ecmeduna@us.ibm.com) or 800-455-7468.*

IBM Learning Services web site:

[www.ibm.com/software/data/content-management/training.html](http://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.

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<sup>2</sup> 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 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 Consultant (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 Document Manager System Administrator
- LDAP Server 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 IMAO Software Services Project Lead.

IBM FileNet System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the Document Manager system and will serve as the on-going administrator. Attending the training 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 the Document Manager software.

DBA (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow Delivery Consultants to perform their 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 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
  - Download the IBM Document Manager software 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.) IBM Content Manager 8 has been installed and validated as operating as expected.
- d.) Analysis and requirements gathering of business application rules, business application processes, and application security access as they pertain to the installation of the Document Manager system.
- e.) Local system administrator(s) trained on the administration of the ECM products to be installed at <IBM Cust>.
- f.) 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 system post-installation.
- g.) Local help desk personnel trained on the IBM client products to be installed at <IBM Cust>.
- h.) Adequate facilities for the IMAO Software Services resources; including cubicles, desks, and telephone, hardware and Internet access service.
- i.) Product Subscription and Support Agreement in place through IBM.
- j.) <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.) Review <IBM Cust>'s Environment
  - Deliver & Review Environment Prerequisite Checklist
- b.) Limited Analysis for Initial Configuration Document defining:

- Up to two Document Classes
  - Up to ten Properties
  - Up to two User Groups
  - Up to two Roles
  - Up to five User IDs
- c.) Install
- Document Manager Server on one Windows server
  - Document Manager Designer on one workstation
  - Deploy Document Manager Desktop on one web browser
    - Integrate with Microsoft Office
- d.) Configure:
- Document Manager to connect to existing one Content Manager environment
  - Up to two Document Classes
  - Up to ten Properties
  - Up to two User Groups
  - Up to two Roles
  - Up to five User IDs
- 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 Document Manager Install Checklist

## 6. Assumptions & Limitations

### 6.1 Assumptions

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

### 6.2 Service Limitations

The Document Manager 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.

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. <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. A visit is four or fewer days at your site by an IBM or IBM subcontract employee. 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 Document Manager Install Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

#### 7.1.1 Review Project Services Description

The SIM 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 is 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: Document Analysis

Before installing the Document Manager software, the Delivery Consultant along with <IBM Cust>'s Document Manager System Administrator will review the desired configuration options and select the best options for the following to create the Document Manager Initial Configuration Document.

- Up to two Document Classes
- Up to ten Properties
- Up to two User Groups
- Up to two Roles
- Up to five User ID's

## 7.4 Task 4: Software Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s Document Manager 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>.

### 7.4.1 Prerequisite Installations

Implementation of Document Manager Server prerequisites according to standard installation procedures as described in Document Manager Installation Guide.

- Install DB2 Run Time Client for connection of Document Manager Server to Content Manager Library Server
- Install Information Integrator for Content (II4C) C++ connector for Content Manager v8
- Implementation of HTTP Server for deployment of Document Manager user interface (Document Manager Desktop)

## 7.4.2 Document Manager Server

The implementation of Document Manager Server consists of implementation and configuration of the following server components.

- Lifecycle Manager
- Notification Manager
- Cache Manager
- Rendition Services
- Automation Services
- Print/Plus Services (optional)

## 7.4.3 Document Manager Designer

Document Manager Designer is the administration application for Document Manager. The <IBM Cust>'s System Administrator will use designer to create and manage document classes, document properties and Document Manager Life Cycle.

## 7.4.4 Deploy Document Manager Desktop

Document Manager Desktop is the client user-interface for Document Manager. Users access the Document Manager Desktop to search, retrieve, launch and process documents as well as process the documents in the Life Cycle.

The deployment of Document Manager Desktop optionally includes the configuration of the Document Manager Application Integration for Microsoft Office.

## 7.5 Task 5: Configure Environment

### 7.5.1 IBM Content Manager Connector

The Delivery Consultant along with <IBM Cust>'s Document Manager System Administrator will configure the connection to CM 8.

### 7.5.2 Configure per the Document Manager Initial Configuration Document

Basic configuration of Document Manager using Document Manager Designer:

- Up to two Document Classes
- Up to ten Properties
- Up to two User Groups
- Up to two Roles
- Up to five User ID's

### 7.5.3 Test the system

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 Document Manager system.

## 7.6 Task 6: System Administration Handoff

### 7.6.1 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.

- Start and stop and Management Document Manager infrastructure services
  - IBM HTTP Server
- Start and stop and Management of Document Manager system services
  - Lifecycle Manager
  - Notification Manager
  - Cache Manager
  - Rendition Services
  - Automation Services
  - Print/Plus Services (optional)

### 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:

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

### 7.6.3 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

### 7.6.4 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> Document Manager 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:

- Import document
- Search document
- Retrieve an launch and view a document
- Create folder
- Export a document
- Run the document through the simple Life Cycle workflow

## 7.8 Task 8: 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 the *IBM Document Manager 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).