



IBM Customer *Content Federated Services for
IBM Content Integrator plus 1
Connector Install
Service Description*

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1. Description of Services

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

- Install Package for IBM Content Federation Services for IBM Content Integrator plus 1 Connector (CFS-ICI + 1 Connector) Install Package

This Install package will facilitate the smooth and rapid deployment of CFS-ICI + 1 Connector to enable Federation of IBM FileNet P8 Content Manager (CM) system to another source repository. 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 actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the CFS solution.

The CFS-ICI + 1 Connector Install Package will provide basic technical planning, installation, testing, and support review for a CFS base installation. The CM product must have been previously installed and must be fully operational prior to the initiation of the CFS-ICI + 1 Connector Install Package.

- Review <IBM Cust>'s current environment to understand the document flow, ingestion location, document classes, indices or properties, security, etc.
- The creation of a CFS-ICI Design Document that will be used as a "road map" for implementing CFS for <IBM Cust>.
 - Select one of the following source repositories¹:
 - IBM Content Manager 8.4.1 or higher (CM8)
 - IBM FileNet Content Services 5.5 or higher (CS)
 - Documentum version 5.x or 6
 - OpenText version 9.6 or 9.7
- Implement CFS-ICI + 1 Connector on <IBM Cust>'s one environment.
 - Install IBM Content Integrator (ICI) 8.5 or higher
 - Install CFS-ICI 4.5 or higher.²
 - Configure P8 CFS for one (1) object store
 - Configure <IBM Cust>'s source repository connector (one library, docbase, or object store)³
- System Administration Handoff
- Project management and coordination to facilitate a smooth and professional project delivery.

This Install Package includes a set of tasks that <IBM Cust> must complete to facilitate a product installation. The resources outlined in this plan will include both the IBM and <IBM Cust> personnel that are required to complete the install and configure the CFS environment.

¹ Contact your local Lab Services Sales Manager ("LS SM") to determine if more recent repositories release versions may be available.

² Installation of the IBM CFS-ICI software requires IBM FileNet P8 4.5 or higher. An upgrade from a previous FileNet P8 version to a current version is outside of the scope of this package. Contact your local LS SM for pricing on any additional install services

³ The CFS-ICI + 1 Connector Install Package includes the installation of one connector limited to one library server or object store. Installation and configuration of additional connectors in order to connect to additional library servers or object stores are considered additional options. Contact your LS SM for pricing for any additional services.

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 the following IBM training. The IBM education required for this installation is as follows:

- Course Code: F042 – P8 Platform Administration 4.5

Please note that IBM may offer an equivalent Instructor Led Online (ILO) or self paced 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 CFS-ICI + 1 Connector 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> Installation 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 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> Resources

<IBM Cust> must 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
- FileNet P8 System Administrator
- Connector Repository System Administrator (e.g. CM8, CS, Documentum, OpenText)
- Windows Server Administrator
- System Operations Coordinator
- LAN Administrator
- Database Administrator
- Document or Records Manager

4. Role Definitions

<IBM Cust> must identify internal personnel to fill the roles as listed in Section 3, Resources. The following outlines the general roles for each of these individuals. Please note that additional resources may be required at various phases of the installation. Likewise, not all of the individuals will necessarily be involved in this install.

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

CFS-ICI System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the CFS-ICI system, and will serve as the on-going administrator. This individual will work closely with the Delivery Consultant during installation and configuration of the ECM software. IBM strongly recommends that this individual become familiar with the ECM products by enrolling in ECM training prior to project initiation.

P8 CM System Administrator (1 to 3 people) - This individual will assume responsibility for the P8 CM system. This individual will work closely with the Delivery Consultant providing passwords and other configuration details in the course of the CFS-ICI installation when access to P8 CM is required.

DBA (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow the Delivery Consultant to perform his or 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 the installation, <IBM Cust> must provide:

- a.) Prerequisites
 - All prerequisites must be met before IBM can begin the installation of the product.

- Installation of the CM software and validation that the software is operating as expected.
 - Installation of the external Repository software and validation that the software is operating as expected, if necessary.
 - All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software. This includes:
 - Installation of the server environment prerequisites⁴
 - Installation of the customer-supplied database
 - Create Federator Database and User
 - Installation and/or application of appropriate levels of patches to meet ECM's minimum requirements
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - All prerequisite hardware and software has been installed onto <IBM Cust>'s designated ECM servers.
 - CFS-ICI software has been downloaded to the appropriate servers prior to the resource arriving at <IBM Cust>'s site.
 - <IBM Cust> is running the currently supported ECM software releases.
 - Complete the *Environment Prerequisite Checklist*.
 - Update the *P8 Plan & Prepare Worksheet*.
- 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/or requirements gathering of business application rules, business application processes, and application security access as they pertain to the configuration of the CM system.
- d.) Local system administrator(s) trained on the administration of ECM products installed at <IBM Cust>.
- e.) Product Subscription and Support Agreement in place through IBM.
- f.) Adequate facilities for each Delivery Consultant including:
- cubicle, desk, telephone, and Internet access,
 - remote access (e.g. VPN access),
 - direct access to the keyboard.
- g.) When performing remote work, <IBM Cust> will provide VPN access into <IBM Cust>'s network and remote access to a workstation in the network that:
- can connect to all required servers and
 - is pre-loaded with all required connectivity tools appropriate to <IBM Cust>'s environment.
- 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

⁴ Installation of CFS-ICI may be on a stand-alone or co-located server. IBM recommends utilizing a stand-alone server in Production or high usage environments.

sufficiently to require a chargeable PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2 IBM Responsibilities

IBM will provide the following activities.

- a.) Provide project management and reporting
- b.) Review Environment
 - Deliver & Review Environment Prerequisite Checklist
 - Deliver & Review the P8 Plan & Prepare Worksheet
- c.) CFS-ICI requirements gathering
- d.) Document the requirements for one (1) of the following external repositories
 - CM8.4.1 or higher
 - Workplace XT 1.1.3 is required for viewing CM8 ModCA documents
 - CS 5.5 or higher
 - IDM Web Services 4.0.2-FP3
 - Documentum version 5.x or 6
 - OpenText 9.6 or 9.7
- e.) Create CFS-ICI Design Document
 - Document up to two Data maps
 - Identify up to two Document Classes
 - Identify up to twelve Properties
- f.) Install Software
 - Install IBM Content Integrator (ICI) 8.5 or higher
 - Install CFS-ICI 4.5 or higher
- g.) Configure <IBM Cust>'s CFS-ICI
- h.) Configure the P8 CFS for one object store
- i.) Configure the Source Repository Connector (one library server or object store)
 - Deploy ICI Administrator Application
 - Create up to two Data Maps
 - Define up to two Federation Rules
 - Define federation schedule
 - Test
- j.) System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology

- Problem Reporting
- k.) Demonstrate CFS-ICI + 1 Connector
- l.) Provide <IBM Cust> a completed CFS-ICI + 1 Connector Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) CM or IBM FileNet Business Process Manager (BPM) has previously been installed, configured, and validated as operating as expected prior to the initiation of this project.
- b.) <IBM Cust>'s external repository has previously been installed, configured, and validated as operating as expected prior to the initiation of this project (if necessary).
- c.) Installation of the CFS-ICI software will not be in a clustered environment. A chargeable PCR will be required to perform the installation in a clustered environment.

6.2 Service Limitations

The CFS-ICI + 1 Connector 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.

Installation of CM is not included within the scope of this installation.

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 IMAO Software Services resources traveling to <IBM Cust>'s site to fulfill IBM's tasks and responsibilities pertinent to delivering this service

The Delivery Consultant will 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 onsite assistance requested by beyond the number of visits indicated above will be billable and documented in a PCR. A visit is four or fewer days at your site by an IBM or IBM subcontract employee. IBM reserves the right to bill <IBM Cust> for any additional trips that are the direct result of <IBM Cust>'s failure to meet or perform its obligations outlined herein.

7. Project Tasks & Deliverables

7.1 Task 1: Kickoff Meeting

This meeting is to prepare the <IBM Cust> and IMAO Software Services project team for the CFS installation and configuration. 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 Service Description, tasks, 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 the 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

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> portion of the document, the SIM will schedule the software installation.

In addition to the Environment Prerequisite Checklist, the FDC will generate an installation P8 Plan & Prepare Worksheet. This worksheet will gather specific details needed to perform the installation, such as server names, IP addresses, directory paths, tablespace names, administrator IDs, etc. The FDC will review the P8 Plan & Prepare Worksheet with the <IBM Cust> resource who will coordinate the completion of this spreadsheet. A number of items listed on this worksheet must be completed on or by <IBM Cust>'s systems or administrators days or weeks prior to the initiation of the installation. Focus should be on the priority defined by the FDC.

IMAO Software Services recommends reviewing any questions arising from the completion of the Environment Prerequisite Checklist or the P8 Plan & Prepare Worksheet during the weekly status calls.

7.3 Task 3: Requirements Gathering

This portion of the Install service will assist <IBM Cust> with identifying the requirements for their CFS configuration. The Delivery Consultant will evaluate <IBM Cust>'s document storage requirements with regards to document ingestion, document retrieval, document class mapping, property mapping, and security. The output of the requirements gathering will be a design document (CFS Design Document) documenting <IBM Cust>'s CFS configuration.

Select from one of the following supported Connectors:

- CM8.4.1 or higher
 - Workplace XT 1.1.3 is required for viewing CM8 ModCA documents
- CS 5.5 or higher
 - IDM Web Services 4.0.2-FP3
- Documentum version 5.x or 6
- OpenText 9.6 or 9.7

7.4 Task 4: CFS-ICI Design Document

The output of IBM's requirements gathering is a CFS-ICI Design Document. The CFS-ICI Design Document will contain the following information:

- Document Class Mappings (up to two)
- Index and/or Property Mappings (up to twelve)
- Federation rules and schedule

7.5 Task 5: Installation

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

7.5.1 ICI Installation

Once there is a defined configuration and the *P8 Plan & Prepare Worksheet* is complete, the Delivery Consultant will install the ICI software. The ICI Administration tool is used to create a connector to the Content Engine.

7.5.2 CFS-ICI Installation

Now that the ICI software has been installed, the Delivery Consultant will install the IBM CFS-ICI software.

7.6 Task 6: Configure CFS-ICI

The Delivery Consultant follows the software installation and configures <IBM Cust>'s CFS-ICI as detailed in the CFS-ICI Design Document.

- Configure the P8 CFS (one object store)
- Configure the Source Repository Connector (one (1) library, doabase, or object store)
- Deploy CFS-ICI Administrator Application
- Create up to two Data Maps
- Define up to two Federation Rules
- Define federation schedule

Once sample data is loaded into the system, the Delivery Consultant and the <IBM Cust> System Administrator will execute a set of routine business tests. The <IBM Cust> Project Team members can use this phase as a

hands-on learning process to ensure they understand the product configuration and testing process of the CFS-ICI system.

7.7 Task 7: System Administration Handoff

7.7.1 Transfer of Information & Mentoring

The Delivery Consultant will review the CFS-ICI + 1 Connector configuration and CFS functionality with <IBM Cust>'s system administrator(s).

7.7.2 Routine Maintenance

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

7.7.3 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.

7.7.4 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 (1-800-429-7378).

7.8 Task 8: 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 to further expand the system post-installation, 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.

7.9 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 CFS-ICI + 1 Connector *Project 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).