



IBM Customer ***IBM FileNet Magnetic Storage
and Retrieval Install Package
Service Description***

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1. Description of Services

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

- IBM FileNet Magnetic Storage and Retrieval (MSAR) Install Package

This service will facilitate the smooth and rapid deployment of MSAR with <IBM Cust>'s IBM FileNet Image Services (IS) system. 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 actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the MSAR solution.

The MSAR Install Package will provide:

- Review <IBM Cust>'s environment to determine and record <IBM Cust>'s document and surface lifecycle.¹
- Create MSAR Design Document to be used as a "road map" for configuring MSAR for <IBM Cust>.
- Install MSAR on <IBM Cust>'s production system².
 - Configure <IBM Cust>'s MSAR as detailed in the MSAR Design Document.
- System Administration Handoff
- Demonstrate the Product to the Project Team
- Review MSAR functionality with <IBM Cust>'s system administrator(s).
- Project management and coordination to facilitate a smooth and professional project delivery.

The scope of this MSAR Install Package is limited to support of IS.

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 install and configure the MSAR environment.

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:

- F458 – IS System 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 MSAR 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.

¹ Installation of prerequisite products (hardware and software) required for the MSAR Platform is <IBM Cust>'s responsibility. Please see the **Hardware/Software Requirements for FileNet Products** document found on <http://www-01.ibm.com/software/sw-atoz/indexF.html>.

² These services include 1 (one) IS combined server (Root/Index/OSAR and one BES). Installation and configuration of any additional local or remote servers are considered additional options.

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 IMAO Software Services 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 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
- FileNet System Administrator
- System Operations Coordinator
- LAN Administrator
- Database 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.

MSAR IBM FileNet System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the MSAR system and will serve as the on going administrator. This individual will work closely with the Delivery Consultant during installation and configuration of the MSAR server and clients.

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 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.
 - Ensure <IBM Cust> is running the currently supported IS software release. IS version 4.0 or 4.1 must already be installed, configured, and fully operational prior to the commencement of the MSAR Install Services³.
 - Complete the *Environment Prerequisite Checklist*.
 - Have attended the required training prior to the installation of any ECM software.
- 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.) The most recent version of IS (4.0) installed and properly configured. Improperly installed or incomplete system configuration may necessitate a PCR to this project if <IBM Cust> desires IBM to correct system deficiencies.

³ This service is outside the scope of the MSAR Install Package. IBM can perform the IS Install for <IBM Cust>. <IBM Cust> will need to purchase the appropriate Image Services Install Package.

- d.) Local system administrator(s) trained on the administration of the IBM FileNet products previously installed.
- e.) Local help desk personnel trained on the IBM FileNet client products to be installed at <IBM Cust>.
- 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.) 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.) Provide project management and reporting
- b.) Review Environment
 - Deliver & Review Environment Prerequisite Checklist
- c.) MSAR requirements gathering
- d.) Provide a MSAR Design Document
- e.) Configure <IBM Cust>'s MSAR
- f.) Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Problem Reporting
- g.) Demonstrate product to the project team
- h.) Provide <IBM Cust> a completed MSAR Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) There is no requirement to migrate any existing documents to MSAR surfaces,
- b.) Installation of MSAR 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 MSAR 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 Consultants (FDC and Delivery Consultant) will travel to <IBM Cust>'s site for **one** 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 onsite 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 MSAR 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 that best fits <IBM Cust>'s installation needs (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: Requirements Gathering

This portion of the installation service will assist <IBM Cust> with identifying the requirements for their MSAR configuration. IBM will evaluate <IBM Cust>'s document storage requirements with regards to retention, surface sizing, document retrieval performance, and required magnetic disk space. The output of the requirements gathering will be a design document (MSAR Design Document) recommending <IBM Cust>'s MSAR configuration and detailing <IBM Cust>'s surface and document lifecycle.

7.4 Task 4: MSAR Design Document

The output of ECM's requirements gathering is a MSAR Design Document. The MSAR Design Document will contain the following information:

- Existing document class and disk family configuration
- Identified business requirements for document retention and retrieval performance
- Document and surface retention plan
- Surface file sizing
- MSAR configuration

7.5 Task 5: Installation and Configuration

Once there is a defined configuration, the FDC will expose the MSAR Library(ies). The Delivery Consultant will configure <IBM Cust>'s MSAR as detailed in the MSAR Design Document.

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

The Delivery Consultant will review the MSAR configuration and MSAR functionality with <IBM Cust> System Administrator(s).

7.6.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <IBM Cust>'s System Administrator with respect to maintenance of the MSAR system. These are tasks that should be performed daily and will be specific to <IBM

Cust>'s usage of the MSAR system and its configuration. IBM recommends that the System Administrator develop a schedule of "housekeeping" procedures and tasks to be performed.

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> 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).

7.7 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.

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 *IBM FileNet MSAR Install 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).