



***IBM Customer*** ***IBM FileNet System Monitor  
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 System Monitor (System Monitor) Install Package

This service provides the expert resources to install the System Monitor software at your site. It also provides hands-on assistance to address any questions, recap key issues, and to verify that <IBM Cust>'s systems and resources are ready to begin applying the knowledge gained 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 confirms that the software is supportable by IBM's Product Support organization.

The scope of this Package is limited to the installation and support of System Monitor. Some of these services can be delivered remotely, please discuss with your IMAO Software Services project team.

This service includes:

- Review <IBM Cust>'s environment<sup>1</sup>
- Install of System Monitor Software on one dedicated management server
- Install and Configure Monitoring Client software on up to three IBM FileNet servers<sup>2</sup>
- Deploy the base Client Monitors & Tasks
- Monitor Testing and Tuning
- System Administration Handoff
- Demonstrate the product to the project team
- Project Management and Coordination

This 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 environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel that are required to install and configure the System Monitor software.

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 **and/or**

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<sup>1</sup> Installation of prerequisite products (hardware and software) required for the FileNet System Monitor 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>.

<sup>2</sup> This effort is to install one (1) System Monitor Client per Operating System. If multiple products are installed on one server, as long as that server is configured with one (1) operating system, then only one (1) FSM client is needed. For example, if a server has three (3) VMWare instances each installed with an IBM FileNet product, then this configuration would need three FSM clients, one for each VMWare instance.

- Course Code: F4580 – 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 System Monitor 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.

### 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
- ECM System Administrator

- Web Master and/or Web Designer
- System Operations Coordinator
- Active Directory and/ or Sun ONE Administrator
- 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 project. 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 Monitor System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the System Monitor system and will serve as the on going administrator. This individual will work closely with the Delivery Consultant during installation and configuration of the System Monitor 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/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).
  - Ensure all prerequisite hardware and software has been installed onto <IBM Cust>'s designated System Monitor Management servers.
  - Download the IBM FileNet System Monitor software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
  - Ensure all P8 or IBM FileNet Image Services (IS) servers, on which to install the System Monitor software, are installed, configured, and working as expected.
  - 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.) All IBM FileNet systems must be running releases of IBM FileNet software that are compatible with System Monitor prior to the initiation of this project.
- d.) <IBM Cust> will pre-install the OS, database, and any additional pieces for the System Monitoring Dedicated Management Server prior to project initiation.
- e.) Local system administrator(s) trained on the administration of the IBM FileNet products previously installed.
- f.) All <IBM Cust> IBM FileNet system administrators involved in the project must attend the kick-off meeting in order to understand and properly express their needs. These are principally the IBM FileNet administrators and administrators working in operations.
- g.) The <IBM Cust> IBM FileNet administrators must attend the installation and configuration meetings in order to learn the functionality and handling of the System Monitor.
- h.) After the <IBM Cust> IBM FileNet System Administrator has observed the Delivery Consultant during the installation, deployment, and configuration, he or she will be responsible for deploying and configuring monitors beyond the base monitors deployed and/or configured in this install package.
- i.) Local help desk personnel trained on the ECM client products to be installed at <IBM Cust>.
- j.) Adequate facilities for each Delivery Consultant including:
  - cubicle, desk, telephone, and Internet access,
  - remote access (e.g. VPN access),
  - direct access to the keyboard.
- k.) 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.
- l.) Product Subscription and Support Agreement in place through IBM.
- m.) <IBM Cust> will make available all <IBM Cust> personnel required for this 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.) Kickoff Meeting
  - Prepare <IBM Cust>'s project team for analysis
  - Initiate project organization and planning
- b.) Review Environment
  - Deliver and Review Environment Prerequisite Checklist
  - Review Pre-Install Checklist
- c.) Install System Monitor software
  - Install System Monitor Management software on one server

- d.) Install & Configure System Monitor Client software on up to three IBM FileNet servers
- e.) Deploy base monitors in <IBM Cust> environment
- f.) Test & Tune Monitors
- g.) (Optional): Integrate System Monitor into existing Directory Services (e.g. Active Directory) security
- h.) (Optional): Implement event forwarding to a central event console by activation of SNMP forwarding (System Monitor provides predefined MIB for import into any ESM system) in one (1) of the following:
  - HP OpenView
  - BMC Patrol
  - Micromuse NetCool
  - IBM ITM 6.1 (Universal Agent)
  - CA Unicenter
- i.) (Optional): Configure a dedicated System Monitor logfile, which can be analyzed by an ESM system.
- j.) Perform System Administration Handoff
  - Transfer of Information
  - Backup Methodology
  - Problem Reporting
- k.) Demonstrate System Monitor to Project Team
- l.) Provide <IBM Cust> a completed System Monitor Install Checklist

## 6. Assumptions & Limitations

### 6.1 Assumptions

- a.) System Monitor Stand-alone version (non Tivoli) will be installed.
- b.) Installation of System Monitor 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 monitors” are not included in this service.

### 6.2 Service Limitations

The System Monitor 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 two (2) 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 System Monitor 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

Together the Delivery Consultant and <IBM Cust>'s system administrator will review the servers on which to install System Monitor. This review will encompass the items indicated in the Environment Prerequisite Checklist that is delivered to <IBM Cust>. Upon completion of the checklist the Delivery Consultant along with <IBM Cust>'s IBM FileNet Administrator will review the document to answer questions that may arise and to confirm that both IMAO Software Services and <IBM Cust> are prepared for the installation and configuration tasks.

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 Information Technology (IT) staff, will schedule the server software installation. <IBM Cust>'s IT 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 install.

### 7.3.1 System Monitor Install for Management Server & IBM FileNet Servers

#### **Management Server**

The Delivery Consultant installs the System Monitor Server software on the Management Server.

#### **IBM FileNet Servers**

The Delivery Consultant installs the System Monitor client on up to three (3) IBM FileNet servers.

### 7.3.2 Deploy & Configure System Monitor

The Delivery Consultant will configure the System Monitor system based upon base monitors and tasks:

- Select the base monitors for each IBM FileNet server
- Deploy monitors to each IBM FileNet server
- Tune the threshold settings for those monitors
- Integrate into existing Directory Services (e.g. Active Directory) security (optional)
- Demonstrate
  - Add, remove or adjust monitors
  - Filtering and/or reports
  - Email forwarding

Upon completion of the configuration and best practices discussion, the team will test the installation validating the system is working as expected, analyzing the output generated, and making any modifications to meet <IBM Cust>'s monitoring needs.

Based upon this discussion and testing, the customer will be responsible to expand beyond the base monitors deployed and tuned.

## 7.4 Task 4: System Administration Handoff

### 7.4.1 Transfer of Information

Throughout the installation, Delivery Consultant will review the System Monitor product with the <IBM Cust> IBM FileNet System Administrator to better prepare <IBM Cust> for further expansion of the system. The Delivery Consultant will reinforce topics covered during the installation of the product.

## 7.4.2 Backup Methodologies

The Delivery Consultant will review possible backup strategies with the <IBM Cust> IBM FileNet 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.

## 7.4.3 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> FileNet 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).

## 7.5 Task 5: Demonstration the System to <IBM Cust> Project Team

After the initial testing, the system is demonstrated to the <IBM Cust> Project Team. The demonstration is an opportunity to review the installation and to train the end users.

Items to Review:

- How to launch System Monitor
- How to review events
- How to respond to events
- How to adjust thresholds
- Knowledge base

This demonstration also allows the project team 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.

## 7.6 Task 6: Project Completion

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 System Monitor Install 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).