



IBM Customer ***IBM FileNet P8 ECM Widgets
Install Package
Service Description***

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Table of Contents

- 1. DESCRIPTION OF SERVICES..... 1
- 2. REQUIRED PRODUCT TRAINING 2
- 3. RESOURCES 3
 - 3.1 IMAO TEAM RESOURCES..... 3
 - 3.2 <IBM CUST> TEAM RESOURCES 3
- 4. ROLE DEFINITIONS 3
- 5. RESPONSIBILITIES 4
 - 5.1 <IBM CUST> RESPONSIBILITIES 4
 - 5.2 IBM RESPONSIBILITIES..... 5
- 6. ASSUMPTIONS & LIMITATIONS..... 6
 - 6.1 ASSUMPTIONS..... 6
 - 6.2 SERVICE LIMITATIONS 6
 - 6.2.1 Travel & Living Expenses 6
- 7. PROJECT TASKS & DELIVERABLES 6
 - 7.1 TASK 1: KICKOFF MEETING 7
 - 7.1.1 Review Project Services Description 7
 - 7.1.2 Define and Review Project Plan 7
 - 7.1.3 Project Status..... 7
 - 7.2 TASK 2: ENVIRONMENT REVIEW..... 7
 - 7.3 TASK 3: ECM WIDGETS INSTALLATION 7
 - 7.3.1 Install & Deploy ECM Widgets Documentation..... 7
 - 7.3.2 Install, Configure & Deploy ECM Widgets 8
 - 7.3.3 Reconfigure and Redeploy Workplace XT..... 8
 - 7.3.4 Install & Deploy Mashup Center 8
 - 7.4 TASK 4: CONFIGURE ECM WIDGETS FOR SYSTEM VALIDATION 8
 - 7.5 TASK 5: SYSTEM ADMINISTRATION HANDOFF 8
 - 7.5.1 Transfer of Information..... 8
 - 7.5.2 Routine Maintenance 8
 - 7.5.3 Review Backup Methodologies 8
 - 7.5.4 Problem Reporting 9
 - 7.6 TASK 6: DEMONSTRATE SYSTEM TO <IBM CUST> PROJECT TEAM 9
 - 7.7 TASK 7: SYSTEM CONFIGURATION DOCUMENT 9
 - 7.8 TASK 8: PROJECT COMPLETION CHECKLIST..... 9

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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 FileNet P8 ECM Widgets (ECM Widgets) Install Package

This service provides the expert resources to install the ECM Widgets software at your site. It also provides hands-on assistance to address questions, recap key issues covered in formal training classes, and to confirm 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 Field Delivery Consultant (FDC) 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 verifies that the software is supportable by IBM's Product Support organization.

The scope of the ECM Widgets Install Package is limited to the installation and a base configuration of ECM Widgets¹.

The ECM Widgets Install Package will provide:

- Review <IBM Cust>'s environment
 - Review the system topology
 - Review ECM Widgets Prerequisite Software Requirements
 - Review of fully functional P8 system (Content Engine, Process Engine, Workplace XT) prior to Install
- Configure IBM FileNet P8 Content Manager (CM) for ECM Widgets
 - The ECM Widgets application requires its own installation and/or instance of Workplace XT. It is strongly recommended that any production environment containing the ECM Widgets application have its own instance of Workplace XT. In non-production environments, a common instance of Workplace XT can be utilized as long as the prerequisites defined below are met.
 - Validate Workplace XT was deployed to the same WebSphere Application Server Profile to which ECM Widgets will be deployed
 - Process Engine Client with REST must be enabled (occurs during Process Engine Client Install)
 - Validate Workplace XT is configured for full SSL Support (ECM Widgets Requirement)
- Installation of the ECM Widgets software
 - Install & Deploy ECM Widgets Documentation
 - Install, Configure, & Deploy ECM Widgets
 - Reconfigure, Redeploy Workplace XT
- Install & Deploy Mashup Center (optional)
- Configuration of the ECM Widgets system for initial validation

¹ The ECM Widgets Install Package does not include installation of Workplace XT, DB2, or WebSphere Application Server. Installation and configuration of any additional services or servers other than those required as part of the installation of ECM Widgets are considered additional options. Contact your Lab Services Sales Manager (LS SM) for pricing for any additional services.

- Deliver System Administration Hand off
- Demonstrate of the ECM Widgets system to the Project Team
- Deliver the System Configuration Document
- 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 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 ECM Widgets 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 that individuals knowledgeable on ECM products will perform 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.

Any change in the scope of work defined in this Service 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 previously completed) the following IBM training. The IBM education required for this installation is as follows:

- Course Code: F046 – BPM Platform Administration 4.5

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 ECM Widgets 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 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 Team Resources

The IMAO Project Lead coordinates the appropriate IMAO resources as required. The IMAO Team typically includes the following members:

- Solution Implementation Manager (SIM) – Project Lead
- IT 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 Project Lead.

Depending upon, the project the <IBM Cust> Project Team may include any of the following roles:

- Project Lead
- P8 System Administrator
- WebSphere Application Server Administrator
- LDAP Administrator
- Windows Server Administrator
- System Operations Coordinator
- LAN Administrator
- DB2 Database Administrator
- End-User Manager

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 Project Lead.

P8 System Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the CM system and will serve as the ongoing administrator. Attending the P8 Platform Administration

class is required and should be completed prior to the installation of the software. This individual will work closely with the FDC during installation and configuration of the CM server and clients.

Windows Server Administrator (1 person) - This individual will assume responsibility for <IBM Cust>'s Windows Servers. This individual will also provide proper access to allow the FDC to perform his/her functions on the Windows Server and will ensure that the appropriate prerequisite software may be installed on the system by the <IBM Cust>'s resources.

WebSphere Application Server Administrator (1 person) - This individual will assume responsibility for <IBM Cust>'s WebSphere Application Server. This individual will also provide proper access to allow the FDC to perform his/her functions in the course of the installation when access to the WebSphere Application Server is required.

LDAP Administrator (1 person) - This individual will work closely with the FDC during the execution of the Widget server installation providing the appropriate LDAP server specific information for connection, container structures, base realms, user and group creations and memberships, passwords and other details as needed. This resource will also provide technical insight into the current <IBM Cust> environment, as required, for the installation phase.

DB2 DBA (1 person) - This individual will assume responsibility for <IBM Cust>'s DB2 database. This individual will also provide proper passwords to allow the FDC to perform his/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 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 required Windows Operating System for ECM Widgets server
 - Installation of the customer-supplied DB2 database²
 - Installation of the customer-supplied WebSphere Application Server (Stand alone or Network Deployment)
 - Installation and/or application of appropriate levels of patches to meet ECM Widgets minimum requirements
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download the ECM Widgets software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
 - Installation & deployment of Workplace XT with full SSL support and Process Engine Client REST enabled.³
 - Complete the *Environment Prerequisite Checklist*.
- b.) A Project Lead with sufficient authority to:

² IBM can assist <IBM Cust> in installing DB2 specifically for the ECM Widgets installation if needed on a Time-and-Materials basis. Contact your Lab Services Sales Manager (LS SM) for pricing for any additional services.

³ Installation of Workplace XT and configuration of the Process Engine Client REST is not included in this Install Package. IBM can assist <IBM Cust> in executing these efforts if needed on a Time-and-Materials basis. Contact your Lab Services Sales Manager (LS SM) for pricing for any additional services.

- 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.) Local system administrator(s) trained on the administration of the ECM products previously installed.
- d.) Adequate facilities for each Delivery Consultant including:
- cubicle, desk, telephone, and Internet access,
 - remote access (e.g. VPN access)
 - computer with direct access to the keyboard.
- e.) When performing remote work, <IBM Cust> will allow remote access (e.g. customer-supplied VPN or IBM remote web tool) 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.
- f.) Product Subscription and Support Agreement in place through IBM.
- g.) <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 Environment
- Deliver & Review Environment Prerequisite Checklist
 - Validate Workplace XT was deployed to the same WebSphere Application Server Profile to which ECM Widgets will be deployed
 - Confirm Process Engine Client with REST was installed during PE Client installation for Workplace XT
 - Validate Workplace XT is configured for full SSL Support
- b.) Install & Deploy ECM Widgets Documentation
- c.) Install, Configure & Deploy ECM Widgets
- d.) Reconfigure, Redeploy Workplace XT
- e.) Install & Deploy Mashup Center (optional)
- f.) Configure ECM Widgets for system validation
- h.) Perform System Administration Handoff
- Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- i.) Demonstrate the Widget System to <IBM Cust> Project Team
- j.) Deliver System Configuration Document

- k.) Provide <IBM Cust> a completed ECM Widgets Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) Installation of the ECM Widget software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- b.) Configuration for Single Sign-on (SSO) or “server hardening” is not included in this Install Package. A chargeable PCR will be required to perform these additional efforts in each environment.
- c.) Additional resources and time for the development of “custom applications” are not included in this service.

6.2 Service Limitations

The ECM Widgets 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 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 resources traveling to <IBM Cust>'s site in order to fulfill IBM's tasks and responsibilities pertinent to delivering this service.

The FDC may travel to <IBM Cust>'s site for **one** (1) visit for tasks associated with delivering this service. The SIM may participate in up to two (2) on-site meetings. . It is intended that status meetings will be held via conference calls. <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 team for the ECM Widgets Install Package Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The IMAO Project Lead, 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 the document, the SIM will schedule the software installation.

IMAO recommends reviewing any questions arising from the completion of the *Environment Prerequisite Checklist* during the weekly status calls.

7.3 Task 3: ECM Widgets Installation

The FDC, 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 software installation.

A member of <IBM Cust>'s IT staff must have attended the P8 Platform Administration training prior to this step to facilitate appropriate system configuration choices and ease support transition to <IBM Cust>.

7.3.1 Install & Deploy ECM Widgets Documentation

Because ECM Widgets is an expansion product for IBM FileNet P8 Platform, the associated ECM Widgets documentation must be added to an existing installation of the IBM FileNet P8 Platform Help.

7.3.2 Install, Configure & Deploy ECM Widgets

ECM Widgets must be deployed on IBM WebSphere Application Server. A new instance of Business Space powered by WebSphere can be installed as part of the deployment or IBM ECM Widgets can be added to an existing Business Space that was installed by an IBM WebSphere Business Process Management product.

7.3.3 Reconfigure and Redeploy Workplace XT

If deploying in a Network Deployed WebSphere Application Server, the FDC will reconfigure and redeploy Workplace XT to ensure that additional ECM Widgets parameters have been included within the Workplace XT application.

7.3.4 Install & Deploy Mashup Center

Upon request, the FDC will install & deploy Mashup Center v1.1. Although not required for ECM Widgets to function, IBM has provided a Business Version of Mashup Center and the Data Viewer Widget. This software is available for download from the same location as the ECM Widgets software. Please note that the installation of Mashup Center does not integrate with ECM Widgets and is a stand alone product. There will be no testing around the implementation of this optional software.

7.4 Task 4: Configure ECM Widgets for System validation

The FDC will create a sample business space and step processor page in Business Space. Once created the Process Designer will be updated by registering the business space pages and defining roles, in-baskets, and application spaces. At that point, the FDC will test a sample BPM application in Business Space.

The <IBM Cust> Project Team members are encouraged to participate in this effort to learn about the basic setup, modification, and testing of the ECM Widgets application.

7.5 Task 5: System Administration Handoff

7.5.1 Transfer of Information

The FDC will review Widgets with the <IBM Cust> System Administrator to better prepare <IBM Cust> for further expansion of the system. The FDC will reinforce topics covered during the installation and in any of the Learning Services courses required for this Install Package.

7.5.2 Routine Maintenance

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

7.5.3 Review Backup Methodologies

The FDC will review possible basic backup strategies with the <IBM Cust> System Administrator. This Install Package does not provide for the FDC to analyze <IBM Cust>'s backup objectives nor does it develop the plan to meet those objectives.

7.5.4 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 FDC 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).

7.6 Task 6: Demonstrate System to <IBM Cust> Project Team

After the initial samples have been tested, IBM will demonstrate the CM system 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.

7.7 Task 7: System Configuration Document

As <IBM Cust> tests the system, the FDC will provide <IBM Cust> the completed System Configuration Document, which includes the <IBM Cust>-supplied data as well as the installed ECM software versions and patches. This document represents a starting point for ongoing maintenance and modification of the system.

7.8 Task 8: Project Completion Checklist

Upon demonstration of the product the FDC will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *IBM FileNet P8 ECM Widgets 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).