IBM Customer

IBM Master Data Management Server for Product Information Management - Guided Install Package
Service Description

January 1, 2010

Table of Contents

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 Master Data Management Server for Product Information Management - Guided (MDM-PIM Server Guided) Install Package

This service provides the expert resources to guide the Customer's MDM Administrator resource through the entire install the MDM-PIM Server Guided 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 Delivery Consultant will help guide <IBM Cust> on proven strategies and procedures that have been employed at other MDM installations. The completed installation also verifies that the software is supportable by IBM's Product Support organization.

The scope of the MDM-PIM Server Guided Install Package is limited to the installation and a base configuration of MDM-PIM Server[1].

The MDM-PIM Server Guided Install Package will:

- Review <IBM Cust>'s environment[2]

- Review the MDM-PIM Server Installation Environment Checklist

- Configure the Application Server for MDM-PIM Server

- Configure the Database for MDM-PIM Server

- Install MDM-PIM Server Software

- Execute Schema Creation Scripts

- Verify Installation

  - Post Installation Check

  - Set up a pre-defined Test Company

- Perform Standard Configuration

- System Administration Handoff

  - Transfer of Information

  - Routine Maintenance

  - Backup Methodologies

  - Problem Reporting

---

[1] The IBM MDM-PIM Server Guided Install includes the guided installation of MDM-PIM and the configuration of one Web Server, one Application server, and one Database server. Installation and configuration of any additional services or servers other than those required as part of the installation of MDM-PIM Server are considered additional options. Contact your Services Sales Manager ("SSM") for pricing for any additional services.
[2] Installation of prerequisite products (hardware and software) required for the MDM-PIM Install is <IBM Cust>'s responsibility. Please see the **MDM Server for PIM Requirements page** found on http://www-01.ibm.com/software/data/infosphere/mdm_server_pim/requirements.html?S_CMP=rnav.

- Demonstrate the product to the Project Team

- Deliver

  - MDM-PIM Server Installation Configuration for customer environment

- Provide Project Implementation Management and Coordination to facilitate a professional project delivery

- Post Installation support of 5 hours, in 30 minute increments for up to 30 days.

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 MDM-PIM Server software.

At the completion of the MDM-PIM Server Guided Guided Install Package, <IBM Cust>'s system and resources will be ready for maintenance support.

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.   Recommended Product Training

As part of the delivery, <IBM Cust> is recommended to have at least one person complete (or have previously completed) the following IBM training. The IBM education for this installation is as follows:

- Course Code: DC720 – Using InfoSphere MDM-PIM Server V6.X

- Course Code: DC730 – Implementing InfoSphere MDM-PIM Server

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 MDM-PIM Server Guided Guided 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 IMAO Service Seller can assist <IBM Cust> in obtaining a recommended training plan specific to <IBM Cust>'s requirements.

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.

<IBM CUSTOMER>

3.1   IBM Team Resources

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

- Solution Implementation Manager (SIM) – Project Lead

- MDM-PIM Server Installation Specialist (Delivery Consultant)

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 ECM Project Lead.

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

- Project Lead

- Infrastructure Consultant

- MDM-PIM System Administrator

- Information Security Resource

- WebSphere or WebLogic Administrator (ONLY IF MQ is in environment)

- WebSphere MQ or Enterprise Messaging Administrator

- Database Administrator

- MDM-PIM Server Application Owner

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.

ROLE	RESPONSIBILITY
Project & Architecture	
Project Manager	• Responsible for process, deliverables, and overall project management; Accountable to business drivers. • Coordinator of resource assignments. • Develop and manage issues resolution and escalation procedures.
Infrastructure Consultant	• Responsible for designing the technical infrastructure to meet business and technical data integration processing requirements. • Responsible for ensuring that the application design is optimized to meet response requirements.
MDM-PIM System Administrator	• Administration of servers used in MDM environment • Work with our MDM Installer to be guided by the Delivery Consultant.

ROLE	RESPONSIBILITY
Information Security Resource	• Customer's infrastructure & application security specialist, responsible for security policies and adherence to policies • Specialist will include both infrastructure & application layers in job responsibilities as well as evaluation of 3rd party products and their adherence to customer's policies
WebSphere or WebLogic Administrator	• Administrator of WAS or Weblogic application server • Works with IBM Delivery Consultant to make sure that MDM components are installed correctly and application pieces run efficiently and correctly
WebSphere MQ or Enterprise Messaging Administrator	• Messaging infrastructure administrator • Works with IBM MDM Installer to ensure that messaging components are installed correctly and run efficiently and effectively • Only necessary IF MQ is involved in infrastructure
Database Administrator (DBA)	• Database commissioning: installation, configuration, deployment. • Database management: user accounts, security, performance. • Provides support to meet data integration development and operational requirements.
MDM Application Owner	• This could be system administrator or separate resource who is specifically responsible for MDM server • Receives knowledge transfer on MDM basic functionality, also attends additional recommended classes to gain further knowledge of MDM server

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 MDM for PIM requirements for system size and performance for the purchased software. This includes:

        ➢ Installation and Verification that OS is at proper patch level

        ➢ Verification that <IBM Cust>'s MDM Administrator either has root access to box or access to a resource that does.

        ➢ Installation of the appropriate database

        ➢ Installation of the web application server

        ➢ Installation of WebSphere MQ (if WebSphere MQ is necessary)

        ➢ Installation and/or application of appropriate levels of patches to meet MDM's minimum requirements

    – Perform a network check (verify server connectivity to network, addressing, correct protocol).

    – Download the MDM-PIM Server software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.

    – Complete the MDM-PIM Server *Installation Environment Checklist*.

b.) Adequate facilities for each Delivery Consultant including:

- Install Option #1, Remote meeting tool, in order to monitor on-site resource if this install is being done with remote guidance

- Install Option #2 , Customer needs to prepare and provide to their MDM Administrator resource one Windows Workstation equipped with MS Office Word and Utility Software: Telnet (putty, ssh as examples), Ftp/sftp, X-server (i.e., Exceed, or Reflection, or Cygwin or VNC for graphical access to server) for access to Server in order for their resource to perform installation. (cubicle, desk, telephone, and Internet access need for Delivery Consultant to help customer's resource in case any issues arise.)

c.) 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

d.) Configure Application Server for MDM-PIM Server with IBM Delivery Consultant guiding <IBM Cust>'s resource through the entire installation.

- WebSphere Application Server or BEA WebLogic Server

e.) Configure Database for MDM-PIM Server with Delivery Consultant guiding <IBM Cust>'s resource through the entire installation.

- DB2 UDB or Oracle

f.) Install MDM-PIM Server Software with Delivery Consultant guiding <IBM Cust>'s resource through the entire installation.

g.) Execute Schema Creation Scripts

h.) Verify Installation

- Post Installation Checklist

i.) Perform Standard Configuration

- Perform step to create_cmp

j.) Receive Administration Handoff from Delivery Consultant

– Transfer of Information
– Routine Maintenance
– Backup Methodology
– Problem Reporting

k.) After the <IBM Cust> System Administrator has performed the full MDM-PIM Installation and gained the knowledge to perform that installation he or she will be responsible for ongoing administration.

l.) Adequate facilities for each Delivery Consultant including:

- cubicle, desk, telephone, and Internet access,

- remote access (e.g., VPN access),

- direct access to the keyboard.

m.) 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 preloaded with all required connectivity tools appropriate to <IBM Cust>'s environment.

n.) Product Subscription and Support Agreement in place through IBM.

o.) <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 MDM-PIM Server *Installation Environment Checklist*

b.) Demonstrate the MDM-PIM Server to <IBM Cust> Project Team

c.) Deliver

- Completed IBM MDM-PIM Server Post Installation Checklist

- Completed IBM MDM-PIM Server Installation Environment Checklist – IBM portion complete

d.) Provide <IBM Cust> a completed MDM-PIM Server Guided Guided Install Package Checklist

e.) Provide 5 hours of Post Installation support, via phone, in 30 minute increments for a period of time not to exceed 30 days from end of Installation.

6.   Assumptions & Limitations

6.1   Assumptions

a.) Installation of MDM-PIM Server software will not be in a highly available environment.

b.) Additional resources and time for the development of "custom applications" are not included in this service.

c.) The <IBM Cust> must allow their MDM-PIM Administrator control over, or access to the resources who do have control over, the entire server environment, The MDM-PIM Administrator needs full access, password, logins and administrator privileges to Server environment in order to proceed with install.

6.2   Service Limitations

The MDM-PIM Server Guided Guided 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 9:00 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 Software Services resources traveling to <IBM Cust>'s site in order to fulfill IBM's tasks and responsibilities pertinent to delivering

this service. Optionally and preferably the guidance can easily be done remotely via some form of meeting tools, such as Unyte in order that Delivery Consultant can see and guide <IBM Cust>'s resource via phone and/or meeting tool.

The Delivery Consultant may travel to <IBM Cust>'s site for **one** (1) visit for tasks associated with delivering this service. The SIM will initiate the project with a kickoff conference call. 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 Software Services team for the MDM-PIM Server Guided Guided 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 Prerequisite Review

The SIM will review the MDM software purchased, <IBM Cust>'s server configuration (hardware, operating system and site specific software), MDM Server-specific network configuration, and <IBM Cust>'s System Diagram. This review will encompass the items indicated in the MDM-PIM Server *Installation Environment*

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 recommends reviewing any questions arising from the completion of the *MDM-PIM Server Installation Environment Checklist* during the weekly status calls.

Typical Agenda Review:

- Designated hardware system is installed and operational.
- Ensure the prerequisite operating system, software and networking are installed and operational, in accordance with the MDM-PIM Server Environment Prerequisite Checklist
- Database, WAS and any other critical components in architecture are installed, running and connectivity established to designated hardware
- Completes all items from the environment prerequisite checklist prior to the start of the Install.

7.3 Task 3: Prepare Application Server

7.3.1 WebSphere Application Server

If using WebSphere as the application server, the <IBM Cust>'s Application Server Administrator along with the Delivery Consultant will verify the configuration settings and patch level, Prepare WebSphere for PIM 6.X application..

7.3.2 BEA WebLogic Application Server

If using BEA WebLogic as the application server, the <IBM Cust>'s Application Server Administrator along with the Delivery Consultant will create and configure a domain for PIM 6.X,.

7.4 Task 4: Configure Database Server

7.4.1 DB2 UDB

<IBM Cust>'s Application Server Administrator:

- Create DB2 Instance
- Create DB2 Database
- Review Disk Considerations
- Review database users
- Create Buffer Pools
- Create Table Spaces
- Create Database user and permissions
- Create DB2 Client on the PIM 6.X Server

7.4.2 Oracle

The Delivery Consultant will review the database buffer pool and table space sizing requirements in order to:

- Review Disk Considerations

- Create a new database
- Review database users
- Set Parameters
- Set Table Space Settings
- Set Transaction Logs
- Create database schema user
- Configure Oracle on the Application Server

7.5 Task 5: MDM-PIM Server 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 software installation.

Now that the Application Server and Database server have been configured, the <IBM Cust>'s MDM-PIM Administrator will install the MDM-PIM Server software using the details provided in the Prerequisite Checklist aided by the Delivery Consultant.

7.6 Task 6: Execute Schema Creation Scripts

After the installation of the application server, the database, and the MDM-PIM Server application, the <IBM Cust>'s MDM-PIM Administrator must run the scripts to create the schema for the database.

7.7 Task 7: Verify the Installation

7.7.1 Post Installation Check

To verify installation, the Delivery Consultant along with the MDM-PIM Server Administrator will log in to the product user interface to execute a post-installation check verifying the following:

- Database Configuration and Settings
- WebSphere Application Server or WebLogic Application Settings
- Product Settings

7.8 Task 8: Standard Configuration

To run MDM-PIM Server, the MDM Administrator must configure some additional details for a standard configuration: These depend on the environment and the MDM Administrator and the Delivery Consultant will work through those as necessary. An example might be the addition of a fixpack etc.

7.9 Task 9: System Administration Handoff

7.9.1 Transfer of Information

The MDM Administrator will have completed ALL the standard installation tasks that the Delivery Consultant would have executed. At this time the Delivery Consultant will review the product with the <IBM Cust> MDM Administrator to better prepare <IBM Cust> for management of the system. Topics to be reviewed:

- Basic stopping & starting of MDM for PIM environment

- Knowledge transfer of routine Maintenance as defined below

7.9.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <IBM Cust>'s System Administrator with respect to maintenance of the MDM-PIM Server. 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.

7.9.3 Review Backup Methodologies

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

7.9.4 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).

7.10 Task 10: Demonstrate System to <IBM Cust> Project Team

After the initial testing, the MDM Administrator will demonstrate the MDM-PIM Server Guided system to the <IBM Cust> Project Team.

- Login to PIM 6.X system

- Demonstrate all PIM 6.X Services are running correctly

- Demonstrate that PIM 6.X Services are patched to appropriate level

7.11 Task 11: Deliverable Documents

The Delivery Consultant will provide <IBM Cust> completed project documentation. These documents represent a starting point for ongoing maintenance and modification of the system.

- Completed IBM MDM-PIM Server Installation Environment Checklist – IBM portion complete

7.12 Task 12: Post Install Support

IBM will provide <IBM Cust> with 5 hours of post install support, via phone, to be used in 30 minute increments. These 5 hours of support will expire 30 days after the installation whether they have been fully used or not.

7.13 Task 13: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> a completed Install Completion Checklist which constitutes completion of this project. Please refer to the *MDM-PIM Server Guided Install Package 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).