



International Information Bulletin for Clients - Installation of IBM Machines

The purpose of this bulletin is to explain IBM's global practices associated with the installation of IBM machines¹. Part 1 focuses on IBM's general installation practices, including what IBM expects a client to do to prepare for installation of a machine; Part 2 focuses on IBM's detailed installation practices, such as specific activities involved with machine installation.

This bulletin is provided for informational purposes only. The sale and installation of IBM machines is governed by the terms and conditions of those transactions, as well as the terms and conditions of the associated machines; the information in this bulletin does not alter or modify any such terms and conditions or any other agreement you may have with IBM. In the event of a conflict between specific machine installation documentation and this bulletin, the machine's specific installation documentation will apply.

Part 1: Explanation of IBM's General Installation Practices

The 2014 IBM Client Relationship Agreement² (the "CRA"), and all versions of the prior IBM Customer Agreement³ (the "ICA"), speak in part to installation of machines acquired directly from IBM, and support IBM's installation practices. Machines acquired through an IBM Business Partner should have equivalent installation terms. Part 1 explains IBM's general installation practices.

1. The client must provide an environment meeting the specified requirements for each machine.

When IBM announces a hardware product⁴ (that is, a "machine"), we specify in that announcement what we refer to as the "Specified Operating Environment", which lists the environmental requirements for the machine. For instance, an announcement may list some or all of the following:

- power requirements (for example, 220V, 60 amps, etc.),

¹ IBM's installation practices for Lenovo machines may vary from the explanations in this bulletin. Contact your IBM representative with questions regarding IBM installation of Lenovo machines

² For the US version of the CRA (and the CRA for Machines, equivalent in context of this bulletin), please follow this link: <https://www.ibm.com/support/customer/csol/terms/?id=Z126-6548&cc=us&lc=en#detail-document> For other countries, please contact your IBM representative.

³ For the US version of the ICA (and the IBM Agreement for Machines, equivalent in context of this bulletin), please follow this link: <https://www.ibm.com/support/customer/csol/terms/?id=Z126-6548&cc=us&lc=en#detail-document>

⁴ IBM product announcements can be found through this link: http://www.ibm.com/common/ssi/index.wss?request_locale=en

- proper temperature range (for example, 15C - 25C),
- maximum amount of particles allowed in the air (for example, <= 1000 parts per million of particles greater than 100 microns), and
- flooring requirements (for example, if a raised floor required).

In each machine's announcement, IBM lists all of the necessary specifications because our warranty for the machine will apply only if the machine is operated within all of its operating specifications⁵. If the operation of the machine deviates from any of the published specifications, IBM is not obligated to provide service under terms of the warranty. The same is true post-warranty: our hardware maintenance service obligations will apply provided the machine is operated within its published specifications.

2. IBM has standard installation procedures for machines that IBM is responsible to install. IBM will successfully complete these procedures before it considers the machine installed.

This provision refers only to what IBM refers to as "Installation by IBM" (or "IBI") machines, which are machines that require installation by IBM. IBM establishes this requirement for certain machines because the machine may be heavy, or because the installation may be difficult, requiring special skills, special tools, or both. IBM's z Systems machines ("mainframes") and most other high-end IBM machines are IBI machines. Installation of an IBI machine is included in the purchase price of the machine, provided the machine is installed within six months of shipment.

First, for certain types of machines, IBM requires that the client perform installation planning. In these cases, IBM provides assistance to the client at no charge, and publishes an installation planning checklist for most IBM machines. Currently, IBM requires such installation planning for the first IBM Power Systems machine installed in a location, and many z Systems machine installations, as well as other IBM machines; clients may contact their IBM representative with questions regarding installation planning requirements for a specific IBM machine.

For each IBI machine, IBM creates specific installation instructions which an IBM System Service Representative ("SSR") is expected to follow. These generally include unpacking the machine, assembling it on the client's floor, loading machine code, running installation verification diagnostics, and (for Return Part MESSs) packing up removed parts and returning those parts back to IBM.

The practice statement implies that the installation must be scheduled. The client and IBM are expected to agree upon a schedule for the installation. For IBI machines, if the client defers installation beyond 45 days⁶ following shipment from IBM, the machine's warranty will

⁵ IBM's Statement of Limited Warranty can be found through this link:

http://www.ibm.com/systems/support/machine_warranties/

⁶ 60 days in Middle East and Africa countries; 75 days in RCIS countries and Greater China Group countries



automatically start. If the client asks IBM to defer the installation beyond six months following shipment, the installation will be billable.

Once IBM begins the installation of a machine, we will "successfully complete" the machine's installation procedures, meaning that IBM will perform all of our standard installation tasks for that type of machine, and then verify that the machine is functioning properly. If, during the course of the installation verification, IBM finds that the machine is not functioning properly, IBM will resolve this issue. Once the installation verification has completed successfully, IBM "turns the machine over" to the client for their use.

It is important to mention a few items that are NOT included in IBM's installation procedures:

- attaching external cables to the machine (such as cables which link the machine to another device),
- customizing the machine's operational settings,
- loading program products (such as an operating system) onto the machine, and
- installation of non-IBM products (such as non-IBM machines or parts), unless IBM specifies otherwise.

The above non-included items are client responsibilities. For further detail regarding tasks that are included and not included as part of IBM machine installation, please refer to Part 2 of this bulletin.

3. The client is responsible for installing a client set-up (or "CSU") machine and, unless IBM specifies otherwise, a non-IBM machine.

For small, generally easy to install machines, IBM generally expects the client to perform the installation, and provides instructions to guide the proper installation of the machine. IBM refers to these machines as "Client Set-Up" (or "CSU") machines. In each machine's announcement letter, and on the purchase contract document used for direct sales by IBM (generally referred to as the "Purchase Supplement"), IBM specifies if the machine is CSU. If the client wants IBM to install a CSU machine, that installation will be billable.

Sometimes, IBM sells non-IBM machines to our clients. As this provision states, the client is responsible for installing non-IBM machines unless IBM specifies otherwise. Such IBM specification would be made in an IBM announcement letter, in a purchase contract pertaining to the non-IBM machine, or both.

Each machine designated as CSU is contractually deemed to be installed on the second business day following IBM's standard transit allowance period for the machine, regardless of when or whether the machine is actually installed. In the US, for all CSU machines the standard transit allowance period is currently six calendar days. The standard transit allowance for other geographies may vary – IBM will provide it upon request. The significance of this effective installation date is that the machine's warranty begins on that date. If the client would like IBM to install a CSU machine, the client should contact their IBM representative with that request. IBM will prepare a service contract for the installation, and following signature of the contract, IBM will perform the installation at a mutually agreed upon time.

Should problems be encountered during the client's installation of a CSU machine, or if



questions should arise regarding the installation, the contact information included in the machine's installation instructions should be referred to.

4. Delayed Installation of IBI Machines

If an IBI machine (and an IBI MES⁷) is not installed within 45 days⁸ of its shipment from IBM, the machine's (or MES's) warranty will automatically begin on that date. Further, if an IBI Machine or IBI MES is not installed within six months following shipment, installation of the machine/MES by IBM is subject to a charge under standard IBM service terms.

Part 2: Description of IBM's Detailed Installation Practices

Many IBM installation practices vary by IBM product line. The following descriptions of IBM installation practices are provided as a general explanation, with product line-specific practices noted. These IBM installation practices apply only to IBM machines and MESs designated as requiring installation by IBM. Part 2 explains IBM's detailed installation practices. Unless specified otherwise, references in Part 2 to "machines" includes both machines and MESs.

1. Installation Scheduling Process

IBM will work with the client to determine a mutually agreeable installation schedule. This is usually handled by the IBM SSR.

2. Standard Installation Times

For a Machine and MES designated by IBM as "Installation by IBM" (IBI), IBM will generally perform the no-charge installation during the machine's warranty service hours (that is, if the machine's warranty includes on-site service by IBM 9x5, then installation will be no charge if the Machine/MES is installed during a 9x5 time period), provided such installation occurs within six months following the machine's shipment from IBM. The price of an IBI Machine and MES includes such normal installation by IBM. IBM will charge for a Machine/MES installation that is requested to be performed outside the machine's warranty service hours.

3. Standard Installation Activities

Installation by IBM includes many activities as part of the installation service. This section provides detail that generally applies to all IBI machines, not only of what is included, but also what is not included. Clients may contact their IBM representative with questions regarding installation of a specific IBM machine.

3.1 Activities Included with IBM Installation

Standard installation of machines by IBM includes many activities such as:

- installation planning assistance,
- unpacking the new machine, and disposing of packing materials,
- minor re-positioning of the new machine,

⁷ MES, or Miscellaneous Equipment Specification, is IBM's term to describe a change to an installed machine, such as an upgrade or conversion.

⁸ 60 days in Middle East and Africa countries; 75 days in RCIS countries and Greater China Group countries



- removing cables from a replaced machine, transferring cables and other inter-machine connections from a replaced machine to the new machine,
- minor movement of a replaced machine,
- de-installation of a replaced machine,
- packing and return shipment to IBM of removed parts (including old frames) associated with MES installations,
- making internal machine connections,
- installation of machine code (also referred to as “licensed internal code” or “LIC” for z Systems) provided with the machine,
- installation, as deemed necessary for the installation by IBM, of prerequisite and co-requisite machine code fixes, updates and patches (not applicable to (i) certain machines – contact IBM for specific machine treatment -- and (ii) MES installations where the base machine is not serviced by IBM under warranty or post-warranty IBM maintenance service contract),
- for z Systems only, read and connect to server client-laid device cables,
- for z Systems only, loading of client-generated Input/Output Configuration Data Set (IOCDs), and
- verification of machine functionality.

3.2 Activities Not Included with IBM Installation

The standard installation of machines by IBM does not include any of the following activities:

- installation of proper electrical hook-up,
- installation of required ducts and other air cooling components, plumbing and other water cooling components, or both,
- moving of the machine from the client's loading dock to the desired installation location,
- relocation of the new machine (other than minor re-positioning),
- relocation, packing, or both of another machine, including a replaced machine,
- installation of new or additional cables,
- laying and connecting external device cables to the machine (other than as specified above for z Systems),
- rearranging or reconfiguring machine components, such as I/O cards, drawer hardware, etc.,
- for certain machines, installation of prerequisite and corequisite machine code fixes, updates and patches (contact IBM regarding specific machine treatment),
- installation of prerequisite and co-requisite program (for example, operating system, middleware, etc.) fixes, updates and patches,
- operational set-up of machine (for example, configuring LPARs, profiles, configuration parameters, etc.),
- network implementation and configuration,
- installation of software other than machine code (for example, programs included as part of a solution), and
- resolution of issues caused by machine interaction with devices that IBM does not service or support.

IBM provides billable services which can perform many of the activities that are not included as part of the standard installation of an IBI machine.

4. MES Installations on Base Machines Not Serviced by IBM

For IBI MES installations on a base machine not serviced by IBM (that is, for a base machine that is out of warranty and is not under IBM maintenance service contract), there are special installation considerations. Details of these considerations can be found in IBM's "International Information Bulletin for Customers – Miscellaneous Equipment Specifications (MESs)"⁹. The following is a brief summary of these considerations:

- only IBM should install an IBI MES; among other reasons, this is required for the MES to qualify for its applicable IBM warranty, and
- it is the client's responsibility to ensure that the base machine is in good working order and has all prerequisite and co-requisite levels of machine code installed.

During the course of an IBI MES installation on a base machine not serviced by IBM, if IBM discovers that the base machine is not in good working order, does not have all required levels of machine code, or is otherwise defective, IBM will stop the MES installation activity and notify the client of the defect. The client may then either (i) contract with IBM to remedy the defect through a billable service contract, then resume the MES installation, or (ii) reschedule the MES installation for a time following the client's resolution of the defect. In such instances of a base machine defect, IBM's country-specific billing practices will be followed, meaning that IBM's time spent on the installation up until the defect discovery may be billable.

5. Successful Installation Process

Once IBM completes the installation of a machine and verifies that the machine is functioning properly, IBM will turn the machine over to the client for the client's use (which includes implementation configuration). For an MES installation that requires an outage of the base machine, IBM will verify that the MES has been properly installed and that the machine is functioning properly before turning the upgraded machine over to the client for the client's use.

6. Unsuccessful Installation Process

Should IBM's verification process indicate that the machine is not functioning properly, IBM will resolve the problem, verify that the machine is functioning properly, and then turn the machine over to the client for the client's use. IBM will not turn the machine over to the client until IBM verifies that the machine is functioning properly.

7. Frame-Roll MES Considerations

Many IBM MESs are characterized as "frame-roll" or "push/pull" installations. For these MES installations, the client is not authorized to make use of both the original machine and the upgraded machine simultaneously unless IBM specifies otherwise. As such, the client will not be able to make use of the original machine upon commencement of the MES installation; the client will be able to make use of the upgraded machine following IBM's successful installation of the MES (which includes deinstallation of the original machine).

⁹ The "International Information Bulletin for Customers – Miscellaneous Equipment Specifications (MESs)" is available through this link: [https://www.ibm.com/support/pages/international-information-bulletin-customers-mis\[...\]-equipment-specifications-mess-g126-5265-03-eng-g126-8301-03-ru](https://www.ibm.com/support/pages/international-information-bulletin-customers-mis[...]-equipment-specifications-mess-g126-5265-03-eng-g126-8301-03-ru)