



IBM Customer ***OmniFind Enterprise Edition
Install and Fast Start for
Windows Package
Service Description***

January 2, 2009



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1. Description of Services

IBM Enterprise Content Management (“ECM”) is pleased to submit this Service Description to IBM Customer (“<IBM Cust>”). <IBM Cust> has requested the following services from IBM:

- OmniFind Enterprise Edition Install and Fast Start for Windows (“IOEE”) Package

This service provides the expert resources to install the OmniFind software at your site. It also provides hands-on assistance to address any questions, recap key issues covered in formal training classes, and to ensure 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 ECM Consultants will help guide <IBM Cust> on proven strategies and procedures that have been employed by other successful ECM installations. The completed installation also ensures that the software is supportable by IBM's Support organization.

The scope of this Install and Fast Start Package is limited to the installation and support of OmniFind Enterprise Edition¹.

This IOEE Install & Fast Start Service will provide:

- Review of <IBM Cust>'s platform/architecture environment
- Document Analysis and Requirements Gathering for the creation of a Data Source Configuration Document
- Installation of the following OmniFind Enterprise Edition Core components:
 - IOEE Core Components
 - Parser
 - Crawler
 - Indexer
 - Search Client Components
 - ESSearchPortlet on WebSphere Portal Server
 - ESSearchApplication on WebSphere Application Server
- Configure Crawler for a Simple Index
 - Configure for up to two (2) Data Sources²
 - Up to two (2) Collections, no more than 100,000 documents
 - Index Content³
- Install Sample Search Portlet (optional)
- Search Configuration
 - Search Results List Layout
 - Document Ranking

¹ This service includes the installation of OmniFind Enterprise Edition in a one (1) server, two (2) server, or four (4) server architecture, Microsoft Windows Operating Systems only. Installation and configuration of any additional services other than those defined as part of this Install & Fast Start service are considered additional options. Contact your Lab Services Sales Manager (“LS SM”) for options.

² The supported data sources for this implementation are listed on 7.5.1 Supported Data Sources.

³ For demonstration purposes and to ensure the completion of indexing, the ECM Consultant will select a subset of content which contains up to 100,000 documents of no more than 10 MG each.

- Categories
- Review Security⁴
 - Global Level Security
 - Document Level Security
- Demonstrate the System to the Project Team
- Project management and coordination to facilitate a successful and professional project delivery

This Install and Fast Start Package includes a set of tasks that <IBM Cust> must complete to facilitate a successful 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 IOEE environment.

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

At the completion of the OmniFind Install & Fast Start 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 individuals knowledgeable on IBM products will be performing the tasks to identify and expand the <IBM Cust> specific definition of the system after the completion of this project. Additional definition services beyond what is documented in this Service Description are outside the scope of deliverables of this Install & Fast Start Package⁵.

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 successfully complete (or have successfully completed) the following IBM training. IBM education required for this installation is as follows:

- Course Code: DW431 - Introduction to OmniFind Enterprise Edition

Please note that IBM may offer an equivalent Instructor Led Online ("ILO") or self paced eLab course. Any of these courses will satisfy this installation package training requirement.

The cost for these training courses is not included in this OmniFind for Windows Package. Please refer to the [IBM Learning Services Web site](#) for detailed information regarding class cost, schedules, course descriptions, ordering options, registration instructions and other 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.

⁴ Configuration of Single Signon is not included in this service. Contact your LS SM for options.

⁵ Services to configure additional site and user specific preferences can be accommodated through a Statement of Work. Contact your LS SM options.

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 ECM Account Team, the <IBM Cust> technical staff and, when applicable, an IBM Business Partner. Examples of Project Team members are listed below.

3.1 ECM Team Resources

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

- Implementation Project Manager (“IPM”) –Project Lead
- Lab Services IT Specialist (“ECM Consultant”)
- Field Delivery Consultant (“FDC”)
- Software Sales Representative (“SSR”)
- Sales IT Specialist (“ECM Sales 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 ECM Project Lead.

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

- Project Lead
- IBM OmniFind System Administrator
- Data Source Administrator
- IT Security Administrator
- User Interface Designer/Developer
- Infrastructure Specialist
- Business Lead Requirements 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.

Project Lead - This individual will represent <IBM Cust> resources and provide project coordination in conjunction with the ECM Project Lead.

FileNet IOEE Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee IOEE and will serve as the on-going administrator for the system. Attending the designated training for this package is required and must be completed prior to the installation of the software. This individual will work closely with the ECM Consultants during installation and configuration of the IBM IOEE software.

DBA (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow ECM 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 successful 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
 - Must comply with the IOEE operating system requirements for Microsoft Windows
 - Installation of IIS
 - Installation of the Web Server, if not IBM HTTP server
 - Installation of IBM JDK 1.4.2 (JDK 1.5 is not supported)
 - Installation of WebSphere Portal if using for the IOEE User Interface
 - Installation/application of appropriate levels of patches to meet IOEE's minimum requirements
 - All prerequisite hardware and software has been installed onto <IBM Cust>'s designated ECM servers.
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Download the IBM FileNet OmniFind for Windows software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
 - 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.) Analysis/requirements gathering of business application rules, business application processes, and application security access as they pertain to the implementation of IOEE. The outcome of this process is a System Design Document.
- d.) Local system administrator(s) trained on the administration of the ECM products.
- e.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the ECM Consultant during the installation, he or she will be responsible for completing the following items.
 - Defining and Indexing additional Collections & Data Sources
 - Defining and maintaining crawler & indexing scheduling

- f.) Local help desk personnel trained on the ECM client products to be installed at <IBM Cust>.
- g.) Adequate facilities for the IBM resources; including cubicles, desks, and telephone, hardware and Internet access service.
- h.) Product Subscription and Support Agreement in place through IBM to provide for on-going maintenance post-installation.
- i.) <IBM Cust> will make available all <IBM Cust> personnel required for this project in a timely manner. 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 PCR addressing additional or extended IBM personnel requirements and additional costs.

5.2 IBM Responsibilities

- a.) Project Management
- b.) Review <IBM Cust>'s IOEE Architecture
- c.) Configuration Requirements Gathering
 - Review of IOEE Functionality
 - Create an OmniFind EE Implementation:
 - Two (2) collections, two (2) Crawlers per Collection
 - Up to two (2) Data Sources
 - Data Source Configuration Document
- d.) Install the following OmniFind Enterprise Edition Components:
 - One (1) Parser Component
 - One (1) Crawler Component
 - Up to two (2) Search Components
 - ESSearchPortleton WebSphere Portal Server
 - ESSearchApplicationon WebSphere Application Server
 - One (1) Index Component
- e.) Configure Crawler(s)
 - For up to two (2) Data Sources
 - Two (2) Collections, two (2) Crawlers, no more than 100,000 documents
- f.) Index Content⁶
- g.) Install ESSearchPortlet (optional)
- h.) Configure Search
 - Search Results List Layout
 - Document Ranking
 - Categories
- i.) Review Security

⁶ For demonstration purposes and to ensure the completion of indexing, the ECM Consultant will select a subset of content which contains up to 100,000 documents of no more than 10 MG each.

- Global Level Security
 - Document Level Security
- j.) Perform IOEE Administration Handoff
- Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- k.) Demonstrate Product to the Project Team
- j.) Provide <IBM Cust> a completed OmniFind for Windows Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) Data Sources to be crawled must be installed, configured, and populated with data.
- b.) This IOEE implementation is designated for English language use only.⁷
- c.) Installation of OmniFind for Windows software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- d.) Additional resources and time for the development of “custom applications” are not included in this service.

6.2 Service Limitations

The OmniFind for Windows 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.

ECM 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 service includes domestic travel and living expenses incurred by ECM resources traveling to <IBM Cust>'s site in order to fulfill IBM's tasks and responsibilities pertinent to delivering this Install Package.

The IPM will initiate the project with a kickoff conference call. Any additional status meetings required will be held via conference calls as well. The ECM consultant will travel to <IBM Cust>'s site for **up to three (3)** visits for tasks associated in delivering this implementation service.

Additional onsite assistance requested by <IBM Cust> beyond the amount specified in the above paragraphs may 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 Services to configure other languages can be accommodated by creating and Statement of Work, contact your LS SM for options.

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 ECM team for the OmniFind for Windows Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The ECM 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/Review Project Plan

Once selected, the Project Team customizes the sample project plan that best fits <IBM Cust>'s installation needs (see Sample Project Plan). The plan is designed to complete the installation in the shortest possible timeframe. 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 IPM 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: Platform/Architecture Configuration Document & Review

The IPM and the ECM Consultant will review the IBM software purchased, <IBM Cust>'s server configuration (hardware, operating system and site specific software), IBM specific network configuration, and <IBM Cust>'s System Diagram. This review will encompass the items indicated in the prerequisite questionnaire that was delivered to the <IBM Cust> prior or during the kickoff meeting. Upon successful completion of <IBM Cust> portion of this document, the IPM will then schedule the software installation at least two (2) weeks into the future.

7.3 Task 3: Document Analysis & Requirements Gathering

IOEE can be configured in a variety of ways in order to meet the requirements of a given business. An adequate configuration that meets <IBM Cust>'s needs begins with valid business assumptions. The ECM Consultant discusses various business requirements with <IBM Cust> and develops a set of assumptions that the team employs during the Fast Start activities. Prior to acceptance by the Project Team, <IBM Cust> reviews these assumptions for accuracy. Should these business assumptions change, the configuration may require changes, as well, to reflect the new assumptions.

The Install & Fast Start package is specially designed to ask the necessary questions and guide <IBM Cust> through the design and implementation process of an IOEE system. The ECM Consultant will perform a data analysis in regards to the configuration of the IOEE system to match the defined needs of the business utilization. Tasks include defining an IOEE collections, data sources, and indexing identified data. The ECM Consultant and <IBM Cust>'s IOEE System Administrator will finalize a Data Source Configuration Document with the information

gathered during this analysis⁸. This document will be used to communicate with <IBM Cust> personnel for additional information and clarification.

7.4 Task 4: Software Installation

7.4.1 Install IOEE Core Components

The ECM Consultant, with the assistance of <IBM Cust>'s IOEE System Administrator, schedules the server software installation. <IBM Cust>'s Information Technology 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 successful software installation.

A member of <IBM Cust>'s IT staff must have attended the training prior to this step. This assures appropriate system configuration choices and eases support transition to <IBM Cust>.

Together the team will install the Parser, Crawler, Indexer runtime components on the designated Windows servers.

7.4.2 Search Client Components

The ESSearchPortlet will be installed on the WebSphere Portal Server providing the Portal user interface. The ESSearchApplication will be installed WebSphere on the Web Application Server providing a web application interface.

7.5 Task 5: Configure Crawler

With the software installed, the ECM Consultant will configure the product for the selected data source(s) for a simple index using the Collections and Crawlers defined in the Data Source Configuration Document. In order to test the configuration, the ECM Consultant and <IBM Cust>'s IOEE System Administrator will index up to 100,000 documents of no more than 20MB each.

7.5.1 Data Sources

The Data Source options for this Service⁹ include (OEE V8.5 only):

- DB2[®] Content Manager Multiplatform V8.3, V8.4
- DB2 Universal Database for Linux, UNIX, Windows[®] V8.1, V8.2, V9.1, V9.5
- FileNet P8 Content Manager 3.0, 3.5, 3.5.2, V4.0
- Lotus[®] Domino[®] Document Manager 6.5.1, 7.0
- Lotus Notes[®]/Domino Server 5.0.9a, or later, 6.0.2CF2, 7.0 (v6.0.2 or later is required to configure native security)
- UNIX file systems
- Windows file systems – Windows 2000 Server, Windows 2003 Server
- Web (HTTP or HTTPS)
- WebSphere[®] Portal Web pages 5.1.0.1, 6.0, 6.0.1
- WebSphere Portal Document Manager 5.1.0.1, 5.1.0.3, 6.0

⁸ The ECM Consultant time required for performing the analysis and creating the Data Source Configuration Document should not exceed one (1) day.

⁹ Implementing Data Source options other than those indicated in this Service are considered out of scope. Contact your LS SM for options.

- Workplace Web Content Management 2.5, 5.1, 6.0, 6.0.1

7.6 Task 6: Install Sample Search Portlet (optional)

If selected, the ECM Consultant and <IBM Cust>'s IOEE System Administrator will install the Sample Search Portlet. This portlet is provided as a sample user interface for WebSphere Portal. Customization of this portlet is the sole responsibility of <IBM Cust>.

7.7 Task 7: Configure Search

7.7.1 Search Results Layout

There are numerous options as to the content which is displayed in the search results: any field in the structured document can be either displayed or suppressed; the content of the search item summary can also be controlled, as well as the summary length; the clickable link can be set to any text contained in the result. Working with the <IBM Cust>, the ECM Consultant will configure these options to the <IBM Cust>'s choices.

7.7.2 Document Ranking

Document ranking, i.e. "relevancy", in IOEE is configurable: for this package, static ranking will be applied, with the basic choices of ranking by number of links to the document, or ranking by date (assuming that the Notes/Domino documents contain a date field).

The ranking can be extended, if the <IBM Cust> chooses, with the following options:

1. Custom boost word dictionary: the ECM Consultant will create, with feedback from the <IBM Cust>, a custom boost word dictionary, and add it to the IOEE configuration. This dictionary will be considered a sample only, with the intention of instructing the <IBM Cust>'s IOEE Administrator in the process of creating and maintaining boost word dictionaries.
2. Assign boost factors to URI patterns: the ECM Consultant, with feed back from the <IBM Cust> will demonstrate how to assign boost factors to URI patterns of the <IBM Cust>'s choosing (up to five patterns will be configured with the assistance of the ECM Consultant). This configuration will be considered a sample only, with the intention of instructing the <IBM Cust>'s IOEE Administrator in the process of assigning boost factors to URI patterns.

7.7.3 Categories

A category tree will be configured, using the <IBM Cust>'s input, in one of the two following ways:

1. Sample category tree, created with ESAdmin. The ECM Consultant, in tandem with the <IBM Cust>'s IOEE Administrator, will demonstrate how to create, add, modify and edit a rule-based category tree. This configuration is intended only as an instructive sample, and will have a maximum depth of five (5) child nodes, with the aid of the ECM Consultant.
2. Category tree (taxonomy) ported from exiting WebSphere Portal configuration. In the case that the <IBM Cust> has an existing taxonomy in WebSphere Portal Server, the ECM Consultant will perform a one time migration to an Enterprise Search category tree, and demonstrate how to create, add, modify and edit a rule-based category tree.

7.7.4 Test

Upon completion of the configuration the ECM Consultant will perform initial testing to validate that the system is operational. The Project Team members can use this phase as a learning process to ensure they understand the complete installation and testing process of the IOEE system.

Test the initial configuration validating:

- User Interface
- Search Results List Layout
- Response Retrieval
- Response Presentation

7.8 Task 8: Review Security

7.8.1 Global Level Security

Global Security (WebSphere Application Server Global Security) will be configured in all cases. The server will authenticate against the <IBM Cust>'s LDAP directory; WebSphere Console Administrators will be assigned via existing LDAP groups.

In the case of WebSphere Portal, the ECM Consultant will run a one-time security integration between Enterprise Search (WebSphere Global) Security, and WebSphere Portal Server Security.

SSO/LTPA configuration will also be configured by the ECM Consultant, thereby giving only LDAP users transparent, authorized access to supported SSO Collections.

7.8.2 Document Level Security

SSO for Identity management will be configured, thereby allowing LDAP authenticated users to search only documents for which they are authorized.

Note: in terms of the ECM Consultant's responsibility for this engagement, this task is limited to configuration of SSO: as the credentials of all the company's users are controlled by the company's LDAP/Security administrator, the ECM Consultant will not be able to solve document-level access anomalies.

7.9 Task 9: System Administration Handoff

7.9.1 Transfer of Information

The ECM Consultant will review the product with the <IBM Cust> IOEE System Administrator to better prepare <IBM Cust> for further expansion of the system. The ECM Consultant will reinforce topics covered in the Learning Services courses required for this Install and Fast Start Package.

7.9.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <IBM Cust>'s IOEE System Administrator with respect to maintenance of the system. 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 ECM Consultant will review possible backup strategies with the <IBM Cust> IOEE System Administrator. This Install and Fast Start Package does not provide for the ECM Consultant 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 ECM Consultant will review troubleshooting and problem reporting procedures and provide a trouble report template to <IBM Cust>. Over time the <IBM Cust> IOEE System Administrator will learn to determine the nature of problems that arise 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 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.

7.11 Task 11: Project Completion

Upon demonstration of the product the ECM Consultant will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to the *OmniFind Enterprise Edition Install & Fast Start for Windows Checklist*.

If issues arise after completion of the project, <IBM Cust> Project Team will attempt to resolve these problems independently or with the assistance of the IBM Product Support Center.