IBM

SIZING AND PLANNING QUESTIONNAIRE

IBM / SIEBEL

Please return the completed questionnaire as follows,
From **Europe, the Middle East,** and **Africa** sizing requests

For PURE xSeries and **pSeries only, please send to SIEBEMEA@it.ibm.com**
For any request that includes iSeries or **zSeries, please send to eSizings@us.ibm.com**

From **All Other Geographies – North Americas, South Americas,** and **Asia Pacifics**
For **all platforms**, please send to **IBM Americas Techline Solution Sizing Center**

Phone:	**800-426-0222**
E-mail:	**eSizings@us.ibm.com**
Fax:	**919-485-2941 (USA)**

WHAT IS A SIZING ESTIMATE?
A sizing estimate is an approximation of the hardware resources required to support a CRM implementation. It is a pre-sales effort based on information available at a point in time, providing an entry into understanding the customer's hardware requirements. Customers' actual experiences will vary from the sizing estimate for many reasons, including batch and reporting workloads, and custom code. The degree of variability can range from small to very significant. IBM assumes no liability for actual results that differ from the sizing estimate.

INTRODUCTION

The purpose of this questionnaire is to collect information that will be used to develop a sizing estimate for the implementation of Siebel Applications on IBM pSeries, xSeries, or zSeries hardware.

A sizing estimate is an approximation of hardware resources required to support an application. It will provide you with an estimate of processor, memory, and disk space requirements.

The accuracy of the sizing estimate is dependent upon the accuracy of the information you provide. Other factors that may affect the accuracy of the projections include batch and reporting workloads, custom code, and unique characteristics of your actual workload. IBM assumes no liability for actual results that differ from the sizing estimate.

We recognize that it may be difficult to provide exact numbers for your environment. A sizing estimate is based on information available at a point in time. As your implementation progresses, it may be possible to develop more accurate sizing data. You may find it advantageous to revisit the sizing process if improved data becomes available.

INSTRUCTIONS FOR COMPLETING THE QUESTIONNAIRE

Please follow these steps to complete the questionnaire:

1) *Make Sure You Have the Current Version of the Questionnaire*

   Over time we revise the Sizing Questionnaire, and before taking the time to complete it you should make sure you have the most recent version. To obtain a softcopy of the questionnaire, please download from http://www.ibm.com/erp/sizing or send a request to the IBM Americas Techline Solution Sizing Center at eSizings@us.ibm.com.

2) *Obtain Assistance if Necessary*

   If you need assistance, your IBM or Siebel representative can obtain support through the IBM/Siebel Competency Center, or you can send your questions to the IBM Americas Techline Solution Sizing Center at eSizings@us.ibm.com or call us at 800-IBM-0222.

3) *Complete the questionnaire.*

   Instructions are located within each section. All information in the General Information Section must be provided before a sizing estimate can be developed. The Database Disk Requirements section may be left blank if you do not wish to receive a database sizing estimate. For all items where a default value is shown, leave the answer blank to accept the default value.

4) *Return the completed Questionnaire to IBM*

   Send your completed questionnaire to IBM as stated in the cover page. If you have a hardcopy of the questionnaire, fax it to us. If you have a softcopy of the questionnaire, e-mail it to us. When faxing, you may return only the pages you filled out.

Return Information

E-mail	Please refer to the cover page return instruction. **eSizings@us.ibm.com** or **SIEBEMEA@it.ibm.com**
Fax	1-919-485-2941 (USA) Attention: Americas Techline Solution Sizing Center

IMPORTANT CONTACT INFORMATION

It is often necessary during the sizing of a system to contact the customer or reseller for further information. If the following details are not completed, it could lead to delays in processing the sizing request.

Customer Information

Company Name:	
Company Address: Include: Street, City, State, Province, Country	
Industry:	

Contact	*Primary*	*Secondary*
Name:		
Contact Title:		
Telephone Number:		
Contact Fax Number:		
Email Address:		

Questionnaire Completed by:			
Name:		Title:	
Phone Number:		E-mail:	
Date Completed:			
Date Sizing estimate required by:			
IBM Contact (if known)			

Contact	*Name*	*Phone Number*	*e-mail*
IBM Client Rep:			
IBM Product Specialist:			
IBM CRM Specialist:			
IBM Opportunity (Required)	OMSYS #:		
IBM Business Partner:			
Siebel Rep:			
System Integrator:			

Project Phase Information

Describe the key milestones and hardware requirements associated with your phased implementation of Siebel Applications.

Phase	Description of Phase and Modules to be included	Planned Hardware Install Date	Planned Production Date
1	Pilot System		
2	Production System		
3	Other (specify): _____		

Additional Comments:

_____

_____

_____

SYSTEM CONFIGURATION

The Information you provide in this section will enable us to complete the sizing estimate for your hardware/software environment. The more accurate and detailed the information that you provide, the more complete the sizing estimate will be.

The information in this section must be completed for a new sizing request.

Indicate Version of Siebel Software to be installed:
✔ *APPLICATION SUITE (check one):*
Siebel 2000
Siebel Version 7

Select Platform for Siebel Database Server:	
✔ *PLATFORM (check one)*	*Configuration (check one where needed)*
pSeries/RS6000 (AIX)	❒ Standalone ❒ SP
xSeries/Netfinity (NT)	❒ V4.0 ❒ Win2000
zSeries/S/390 (OS/390)	

Select Platform for Siebel Application (Mid-Tier) Server:	
✔ *PLATFORM (check one)*	*Configuration (check one where needed)*
pSeries/RS6000 (AIX)	❒ Standalone
xSeries/Netfinity (NT)	❒ V4.0 ❒ Win2000

Select Database for Siebel Database Server:
✔ *DATABASE (check one)*
DB2
Oracle
SQL Server

Select Non-Production Systems to be included in this sizing (check all that apply).				
✔	*Non-Production Systems*	*Number of concurrent users*	*Disk space for this system, as a percentage of production*	*Dedicated (separate) Servers for this system[4]? (default =Yes)*
	Development System[1] (Recommended)		%	**Yes** or **No**
	Test System[2] (Recommended)		%	**Yes** or **No**
	Training System[3]		%	**Yes** or **No**
	Other (specify): _____		%	**Yes** or **No**

Notes:
1. A **Development System** is used for ongoing customization or new development of the application modules.
2. A **Test System** enables complete testing of upgrades and new software modules prior to implementation in the production environment. It should be configured similarly to production system to allow all aspects of the system to be tested before being implemented in production.
3. A **Training System** is used to for training current and future users of the production system.
4. The **Dedicated (separate) Servers for this system** option allows you to specify whether the various non-production systems will each have it's own set of servers. Specifying Yes will result in sizing a separate set of servers for each non-production system. All non-production systems with No specified will share servers with each other where feasible. Production systems are always assumed to have separate servers from non-production systems, regardless of this option.

APPLICATION SIZING FOR SIEBEL 2000 (VERSION 6)

The following pages will address question vital to the sizing process. We understand that you may not have enough information to answer all the questions with precision during your initial sizing. At a minimum, however, you must answer the first section entitled User Counts. The output in this case will only identify processor and memory requirements for on-line users. If you want a more comprehensive sizing estimate which will include database disk sizing, you must complete the Disk sizing section that follows.

Siebel uses a number of different types of clients.

- v **Connected client**: This type of user connects to the database server and uses a "fat client" PC to process the business logic of the Siebel transactions.

- v **Thin Client** In this category, there are three different types:

  - v **ActiveX client**: this user uses a web browser with the Siebel ActiveX module to connect to a Siebel application server, which in turn, processes all the application logic.

  - v **HTML client**: this user also uses a web browser, but connects to the Siebel server through a web server.

  - v **Java client**: this user runs a Java version of the Siebel GUI.

- v **Mobile Client:** This type of user accesses the system while NOT network-connected to the system. To facilitate this, a subset of the application and data reside locally on the remote user's workstation. The remote user will periodically connect to the system to resynchronize, i.e. to send updates made on the remote client to the servers, as well as to bring down changes from the server to the workstation.

User Counts

Complete the table below for each of the modules that you will be implementing.				
Client	**Total Peak Concurrent Users [1]**			**Total Licensed / Named users [2]**
	Heavy Users [3]	Medium Users [3]	Light Users [3]	
Connected/Dedicated Clients				
ActiveX and Java Thin Clients				
HTML Thin Clients				
Mobile/Remote Clients				*see note 4*

APPLICATION SIZING FOR SIEBEL VERSION 7

The following pages will address question vital to the sizing process. We understand that you may not have enough information to answer all the questions with precision during your initial sizing. At a minimum, however, you must answer the first section entitled User Counts. The output in this case will only identify processor and memory requirements for on-line users. If you want a Database disk sizing estimate, you must complete the Disk sizing section that follows.

Siebel Web Client and Mobile Web Client

- **Dedicated Web Client**: These are the LAN or WAN attached Microsoft Windows client delivered through a Web browser that provides direct connectivity to the Siebel Database Server. It requires software to be installed on the client machine, but does not require a local database, Web Server, or Application Server for interactive user sessions. A Siebel Application Server is still required for functionality like Assignment Manager and Replication. The software installed on the user's machine for the Siebel Dedicated Web Client and Siebel Mobile Web Client is identical – the only difference is the type of connectivity provided.

- **Web Client**: These are the LAN or WAN attached users accessing Siebel application using a standard web browser from the client personal computer and do not require any additional persistent software installed on the client. The browser connects through a Web server to the Siebel eBusiness Application Server, which executes business logic and accesses data from the Siebel Database. This information (along with other considerations) will be used to provide database server, Siebel server, and web server recommendations. A WAN user is defined as any user that accesses the web server from outside the local office where the web server resides.

- **Mobile Web Client**: These are users accessing the Siebel application using a portable Microsoft Windows client delivered through a Web browser that is designed for local data access and does not need to be connected to a server. Siebel Mobile Web Client meets the needs of field professionals who do not have continuous access to a network. Siebel Mobile Web Client uses a local database on each mobile machine. Periodically, the client must access Siebel Remote Server through a dial-up, WAN, or LAN connection to synchronize data changes with the Siebel Database on the database server and Siebel File System. This client requires installation of Siebel software on the user's personal computer. This information (along with other considerations) will be used to make appropriate Siebel Remote recommendations.

User Counts

Complete the table below for each of the modules that you will be implementing.				
Client	**Total Peak Concurrent Users [1]**			**Total Licensed / Named users[2]**
	Heavy Users[3]	Medium Users[3]	Light Users[3]	
Dedicated Web Client				
Web Client				
Mobile Web Client				*see note 4*

Please see notes details on next page.

Notes:

1. Peak Concurrent users is the **peak load** of users on the system. It is the maximum number of users accessing the system **at the same time**. This is typically the number of users logged during the busiest time of the business day. Include only users who are actually executing application functions during peak workload.
2. Total Named/Licensed user is the total number of users who potentially can access the system. Unlike the Peak Concurrent Users, this is a total count of all potential users. Note that this count is determined the remote server disk requirements for Mobile clients.
3. The user community can be subclassified as Heavy, Medium, and Light users. A Heavy user will be entering transactions very frequently. A Medium user is an "average" user in terms of the frequency of transactions. Light users enter transactions infrequently, or at less frequently than Medium users. Transaction rate is the ONLY differentiating factor between, Heavy, Medium, and Light users. You may elect not to classify your users this way. For example, if there is insufficient data about the breakdown of users, then you may prefer to simply specify all users as Medium.
4. For Peak Concurrent Users for Remote Clients, specify an estimate for the peak number of remote clients who will be re-synchronizing at the same time. Also please provide the TOTAL Remote clients who will be connected to the Remote server at any time to size appropriate Remote Server.

Availability and Transaction Requirements

Please outline any specific unique availability options required. The default values will be used if no value is specified.

Specify system failover option.		
	Requirement	*Default Value*
Do you want a failover system environment in case of unplanned outages? (If yes, you must answer the next questions.)	**Yes** or **No**	No
To which system do you want to failover? (Examples: development system, test system, or dedicated system in idle standby)		

SYSTEM CAPACITY (CPU UTILIZATION GUIDELINE):

Based on experience, systems are sized with a guideline of 75% total CPU utilization with the exception of zSeries(S/390) which is 90% total CPU utilization. This provides for:
- v   a minimal amount (10% of the total CPU capacity) for other workloads running on the system, such as batch jobs or system administration
- v   variance between the calculated vs. actual workload
- v   a small amount of growth
- v   the fact that systems may experience performance degradation when CPU utilization goes above 90% on zSeries and 75% on all the other platforms.
- v   For **Batch Workload on zSeries(S/390)**, please specify the following percentages based upon projected batch workload executing during online peak hour (e.g. Assignment Manager, Workflow Manager, eAI, EIM, interface adapters, etc.):
  - v   Light   10% (default)
  - v   Medium   20%
  - v   Heavy   30%

The CPU requirement is calculated by projecting the on-line and EIM workloads, and then considering the utilization guidelines. However, the default estimate does not include any large batch, reporting, heavy printing, or ad hoc query. Therefore you may want to increase the amount of the CPU reserved for such workloads for this sizing estimate.

Specify CPU sizing utilization guidelines				
Type	*Percentage of CPU reserved for sizing projection: (pSeries and xSeries))*	*Default*	*Percentage of CPU reserved for sizing projection: (zSeries only)*	*Default*
Batch & Other workloads:	%	10%	%	10%
System Safety	%	25%	%	10%

DATABASE DISK REQUIREMENTS

Provide us with your estimate of the amount of disk space that is needed. Some customers have already estimated database requirements prior to completing this questionnaire. **If known, please complete the below 1) Database Size table. If this information is NOT already known, please complete below 2) Legacy Data Profile and 3) Data Distribution Profile tables.**

1) Data Base Size:

Specify database sizing information, if already known:	
Database already sized ?	**Yes** or **No**
How Large?	GB

IBM is to provide an estimate of the amount of disk space needed for the start of the project. As estimation of disk space requirements is approximate and business volumes often change during the lifetime of the project, we advise that the amount of space needed for the database is assessed on an ongoing basis, and that extra disk capacity is added as needed. However, in order for us to provide you the initial DB size, please indicate the volume of initial legacy data import into Siebel for the following entities.

2) Legacy Data Profile:

Indicate the volume of <u>initial legacy data import</u> into Siebel for the following entities:	
Business Entity	*Number of records*
Accounts	
Opportunities	
Contacts	
Activities	
Employees	
Products	
Product Lines	
Campaigns	
Agreements	
Product Shipment (CPG)	
Product Consumption (CPG)	
Product Defects (SSV):	
Forecasts	
Price Lists:	
Quotes:	
Service Requests (SSV):	
Territories:	
Other:	
Orders	

3) Data Distribution Profile:

Provide the <u>average</u> data distribution information for the following entities:	
Opportunities	
Average # of contacts per opportunity:	
Average # of products per opportunity:	
Positions that can see the opportunity:	
Contacts:	
Average # of positions per contact:	
Products/Product Lines:	
Average # of products per product line:	
Quotes:	
Average # of lines per quote:	
Orders:	
Average # of lines per Order:	
Forecasts:	
Average # of products per forecast:	
Average # of opportunities per forecast	

EIM Transactions:

The EIM feature provides for capturing legacy data and synchronizing Siebel databases.

Specify the volume of legacy records that will require resynchronization into Siebel. In each box, specify the number of records that will be updated via EIM in a peak 24-hour period. As a guideline, select the day of a month which will require the largest EIM load. Count updates to all fields in one record as one update.

EIM Workload			
EIM Entities:	*Total Inserts/ Updates per 24-hour day*	*Total Merges per 24-hour day*	*Total Deletes/ Purges per 24-hour day*
Accounts			
Opportunities			
Contacts			
Activities			
Employees			
Products			
Product Lines			
Campaigns			
Agreements			
Product Shipment (CPG)			
Product Consumption (CPG)			
Product Defects (SSV):			
Forecasts			
Price Lists:			
Quotes:			
Service Requests (SSV):			
Territories:			
Other:			
Orders			