

## Sample Statement of Work for Services

**This is an example and your Statement of Work may vary given your specific requirements and the related IBM engagement.**

### IBM Implementation Services for Power Systems – IBM Systems Director

#### 1. Scope of Work

Under the IBM Implementation Services for Power Systems – IBM Systems Director (“Services”), IBM will install and configure IBM Systems Director on a designated management server in an AIX environment and configure up to four endpoints to be monitored by IBM Systems Director.

IBM will identify the details relating to the Services in the Schedule for IBM Implementation Services for Power Systems – IBM Systems Director (“Schedule”) which accompanies this Statement of Work (“SOW”). The Schedule will also identify locations at which the Services will be provided and any applicable optional Services selected.

#### 2. Definitions

**IBM Systems Director** - a platform-management foundation that streamlines the way physical and virtual systems are managed across a heterogeneous environment.

**Services Recipient** – means any entities or individuals receiving or using the Services, or the results or products of the Services.

#### 3. Services

##### 3.1 Services Coordination

##### 3.1.1 IBM Responsibilities

The purpose of this activity is to provide an IBM Services specialist who will be IBM’s focal point during performance of the Services. The IBM Services specialist will:

- a. review the SOW, and any associated documents, with Customer Point of Contact;
- b. establish and maintain communications through Customer Point of Contact, as defined in the section entitled “Customer Point of Contact Responsibilities” below;
- c. review and administer the Project Change Control Procedure with Customer Point of Contact, as defined in the Schedule; and
- d. coordinate and manage the technical activities of IBM’s assigned personnel.

**Completion Criteria:**

This is an ongoing activity that will be considered complete at the end of the Services.

**Deliverable Materials:**

- None

##### 3.1.2 Customer Point of Contact Responsibilities

Prior to the start of the Services, you will designate a person (“Customer Point of Contact”) to whom all communications relative to the Services will be addressed, and who will have the authority to act on Customer’s behalf in all matters regarding this SOW. Customer Point of Contact will:

- a. serve as the interface between IBM’s project team and all of your departments participating in the Services;
- b. attend status meetings;
- c. obtain and provide applicable information, data, consents, decisions and approvals as required by IBM to perform the Services, within two business days of IBM’s request; and
- d. help resolve Services issues, and escalate issues within Customer’s organization, as necessary.

##### 3.1.3 Customer General Responsibilities

IBM’s performance is dependent upon Customer management and fulfillment of your responsibilities, at no charge to IBM. Any delay in performance of Customer responsibilities may result in additional charges

and/or delay of the completion of the Services. Such additional charges and/or delay will be handled in accordance with the Project Change Control Procedure. Customer will:

- a. make appropriate personnel available to assist IBM in the performance of its responsibilities;
- b. provide safe access, suitable office space, supplies, furniture, high speed connectivity to the Internet, and other facilities for IBM's personnel while working at the location(s) specified in the applicable Schedule;
- c. ensure that current maintenance and license agreements are in place with applicable vendors for those products and services upon which IBM is relying to provide the Services described herein;
- d. allow IBM, at the completion of the Services, to cite Customer's company name and the general nature of the Services to other potential customers;
- e. authorize International Business Machines Corporation and its subsidiaries (and their successors and assigns, contractors and IBM Business Partners) to store and use Customer's business contact information wherever IBM does business, for use in connection with IBM products and services or in furtherance of IBM's business relationship with Customer;
- f. obtain any necessary consents and take any other actions required by applicable laws, including but not limited to data privacy laws, prior to disclosing any of its employee information to IBM. Customer also agrees that with respect to data that is transferred or hosted outside of the United States, Customer is responsible for ensuring that all such data transmitted outside of the United States adheres to the laws and regulations governing such data;
- g. be responsible for the content of any database, the selection and implementation of controls on its access and use, backup and recovery and the security of the stored data. This security will also include any procedures necessary to safeguard the integrity and security of software and data used in the Services from access by unauthorized personnel;
- h. be responsible for the identification and interpretation of any applicable laws, regulations, and statutes that affect Customer's existing application systems, programs, or data to which IBM will have access during the Services. It is Customer's responsibility to ensure the systems, programs, and data meet the requirements of those laws, regulations and statutes.

#### **3.1.4 Mutual Responsibilities**

IBM and you will each comply with applicable export and import laws and regulations, including those of the United States that prohibit or limit export for certain uses or to certain end users, and each of us will cooperate with the other by providing all necessary information to the other, as needed for compliance. Each of us shall provide the other with advance written notice prior to providing the other party with access to data requiring an export license.

### **3.2 IBM Implementation Services for Power Systems – IBM Systems Director**

#### **3.2.1 IBM Responsibilities**

##### **Activity 1 - Project Kickoff**

The purpose of this activity is to facilitate a high-level project kickoff conference call with the Customer for up to two hours on a mutually agreed upon date and time.

##### ***Task 1 - Conduct Planning Session Conference Call***

IBM will:

- a. define the services team roles and responsibilities;
- b. review objectives, goals, and critical success factors;
- c. review completion criteria and critical dates;
- d. review implementation plans and identify the tasks to be completed; and
- e. schedule the onsite planning session and installation activities.

##### ***Completion Criteria:***

This activity will be complete when IBM has conducted the remote planning session conference call.

##### ***Deliverable Materials:***

- None

## **Activity 2 - Planning**

The purpose of this activity is to collect the IBM Systems Director requirements and create a plan for installation of IBM Systems Director software.

### ***Task 1 - Conduct Onsite Planning Session***

- a. IBM will conduct a planning session for up to two hours with your designated personnel, to:
  - (1) discuss your IBM Systems Director requirements;
  - (2) define the detailed IBM Systems Director installation activities; and
  - (3) identify the required AIX operating system upgrades and/or modification requirements. This would include patches or technology level upgrades that are pre-requisites for IBM Systems Director.

### ***Task 2 - Document Findings***

IBM will:

- a. document the outcome of the onsite planning session in a IBM Systems Director Installation Plan; and
- b. prepare IBM Systems Director Implementation Worksheets which detail the platform management design.

### ***Completion Criteria:***

This activity will be complete when IBM has:

- conducted the onsite planning session, and
- delivered the IBM Systems Director Installation Plan and IBM Systems Director Implementation Worksheets to Customer Point of Contact.

### ***Deliverable Materials:***

- IBM Systems Director Installation Plan
- IBM Systems Director Implementation Worksheets

## **Activity 3 - Installation and Configuration**

The purpose of this activity is to install and configure onsite IBM Systems Director software in accordance with the IBM Systems Director Installation Plan.

### ***Task 1 - Prepare for Implementation of IBM Systems Director***

IBM will:

- a. review the IBM Systems Director Installation Plan and IBM Systems Director Planning Worksheets with Customer Point of Contact;
- b. prepare the AIX logical partitions, up to four, on the IBM Power System by implementing the filesets required for IBM Systems Director management; and
- c. review the firewall/security settings which may block the ports used by IBM Systems Director. If any ports are found to be blocked which are necessary for IBM Systems Director, unblock the respective ports with the Customer's assistance.

### ***Task 2 - Install and Configure IBM Systems Director***

IBM will:

- a. configure the filesets for IBM Systems Director on the designated management server;
- b. install the filesets for IBM Systems Director on the designated management server;
- c. perform a system discovery to assign four endpoints which are to be monitored by IBM Systems Director on the designated management server;
- d. provide basic skills instruction for up to two members of your systems operation staff. This basic skills instruction will be conducted during the "Installation and Configuration" activity and will not be delivered as a separate education activity. Your systems operation staff members must have basic knowledge of the software products being installed as part of this activity; and
- e. create and deliver a IBM Systems Director Installation Record that identifies the configuration activities performed as part of this Services; and

**Completion Criteria:**

This activity will be complete when IBM has:

- installed and configured filesets on the management server as specified in the IBM Systems Director Installation Plan; and
- delivered the IBM Systems Director Installation Record to Customer Point of Contact.

**Deliverable Materials:**

- IBM Systems Director Installation Record

**3.2.2 Customer Responsibilities****Project Kickoff and Planning**

You agree to:

- a. ensure your personnel assigned to this project are available for the duration of the planning session;
- b. provide detailed configuration information for any existing or “on order” systems to be included as part of the Services;
- c. provide necessary information for the IBM team to complete the IBM Systems Director Implementation Worksheets; and
- d. have all the following prerequisite hardware installed and operational at your location prior to the commencement of the Installation and Configuration activity.

**Installation and Configuration**

You agree to:

identify up to two members of your systems operation staff to receive basic skills instruction. These staff members must have basic knowledge of the software products being installed as part of this activity;

- e. provide assistance, if any network ports are found to be blocked which are necessary for IBM Systems Director, by unblocking respective ports which will be communicated by the IBM team; and
- f. provide internet access to the IBM team to download the necessary software packages required for IBM Systems Director, if applicable;
- g. be responsible for conducting regular backups and maintaining appropriate backup recovery procedures at your location. The Services are not a substitute for regular data backups and standard backup and recovery procedures; and
- h. specify IBM Systems Director settings ports, filters, traffic direction, rules, and network address translation specifications, if any.

**4. Deliverable Materials**

The Deliverable Materials, identified as Type II Materials, resulting from the completion of these Services will be:

- IBM Systems Director Installation Plan
- IBM Systems Director Planning Worksheets
- IBM Systems Director Installation Record

See Appendix A, “Deliverable Materials Guidelines”, for a description of each deliverable.

**5. Completion Criteria**

IBM will have fulfilled its obligations for the Services described in this SOW when any one of the following first occurs:

- a. IBM completes the activities described in this SOW, including provision of the deliverable Materials; or
- b. the Services are terminated in accordance with the provisions of the Agreement identified in the Schedule.

**6. Charges**

The charges for the Services described in this SOW are detailed in the applicable Schedule.

## **Appendix A: Deliverable Materials Guidelines**

### **A - 1: IBM Systems Director Installation Plan**

**Content:**

IBM will provide the IBM Systems Director Installation Plan to detail the topics discussed during the planning session. The IBM Systems Director Implementation Plan will include:

- a detailed description of the IBM Systems Director management framework design, including hardware and software configurations and managed systems topology diagrams.
- installation requirements (for example, minimum hardware, software requirements, network requirements).
- list of activities which will be carried out as a part of these Services.

**Delivery:**

IBM will deliver one copy of the IBM Systems Director Installation Plan, in reproducible format, to Customer Point of Contact within one week after completion of the "Planning" activity.

### **A - 2: IBM Systems Director Planning Worksheets**

**Content:**

IBM will provide the IBM Systems Director Planning Worksheets to summarize the configuration defined during the planning session. The IBM Systems Director Planning Worksheets will consist of configuration IBM Systems Director implementation including:

- management server details
- managed systems details
- IBM Systems Director process monitoring details
- user credentials
- event automation plan details

**Delivery:**

IBM will deliver one copy of the IBM Systems Director Planning Worksheets, in reproducible format, to Customer Point of Contact within one week after completion of the "Planning" activity.

### **A - 3: IBM Systems Director Installation Record**

**Content:**

IBM will provide the IBM Systems Director Installation Record which documents the installation and configuration activities. The IBM Systems Director Installation Record will detail:

- software products installed as part of these Services.
- configuration activities performed as part of these Services.
- monitoring configuration performed as part of these Services.
- basic skills instruction provided during these Services

**Delivery:**

IBM will deliver one copy of the IBM Systems Director Installation Record, in reproducible format, to Customer Point of Contact within one week after completion of the "Installation and Configuration" activity.