

Performance Tuning Service Offering Description

1 Objectives

EMC-Documentum delivers software that supports the deployment of enterprise content management solutions to satisfy the following critical objectives for their customers:

- To manage all types of content in its most fundamental and reusable, component forms; and
- To simplify and expedite content creation, acquisition, and distribution through the development and use of templates, lifecycles and workflows to support business processes;
- To expand control of content through the use of enterprise-scale content management tools, functionality, and best practices.

To achieve these objectives, any content management system must perform to the full expectation of its user community. This Performance Tuning Service Offering is provided as a first step in maximizing the return-on-investment of an installed system, and establishing a baseline for ensuring efficient use of system resources – which, in turn will ensure end-user satisfaction.

The performance metrics collected and documented as part of this engagement can also serve as the basis for subsequent, periodic reviews of system status. Additional services, in the form of Performance Reviews, also known as “health checks”, can also be defined to provide pro-active monitoring and inspection of systems, preventing deterioration of system resources or response due to increases in user population, addition of applications, upgrades of supporting software, etc. These additional services may be arranged under separate agreement, by contacting *EZR Consulting* for more details.

The objectives for this Performance Tuning engagement are to analyze a specific set of performance elements for the target system, identify and isolate problems within the deployed Documentum environment. In addition, the Consultant will make recommendations for improvements to configuration and design elements that must be addressed by the customer or third-party development and support resources, such as database administrators, network administrators or application developers. The performance characteristics to be evaluated are described in a report that the Consultant will provide to the customer as a template, and customized during the engagement to document the specific recommendations made for the analyzed system.

2 Scope of Services¹

This Performance Tuning Service Offering provides a thorough analysis of a single, representative instance of a server, repository and associated database, and consists of the following activities:

- **Workshop Conference** – the initial activity will consist of a working meeting between the Documentum consultant and the customer’s IT and Business team. This meeting will establish the goals of the engagement, capture and document current system configuration, and define performance metrics to be measured.
- **System Analysis and Tuning** - During this phase of the engagement, the Consultant, along with the appropriate customer resources, will confirm data from the Workshop Conference, perform measurements of the existing system and record results.

¹ Note: completion of any specified pre-engagement activities including site preparation, information gathering, training in Documentum product fundamentals, and selection of the customer project team are required prior to the commencement of the services delivery process. The schedule is also subject to the qualifications specified in the Engagement Activities, Deliverables and Assumptions section of this Services Description, as well as any delivery parameters specified in the associated Statement of Work.

Note: Based on the customer's established Change Migration Process, the Consultant's analysis may be limited to viewing and documenting recommended changes to the production system. However, when the customer can provide a development or QA environment onto which the production system is duplicated, the ability to develop, test and adjust performance parameters is greatly enhanced. Lack of a performance test environment may even reduce the reliability or certainty of recommendations in the final report. This engagement scope assumes the availability of such a non-production environment on which tuning recommendations may be evaluated in more detail and with more predictability. In the event that this environment is not available, the analysis may be reduced in duration.

- **Performance Analysis and Tuning Report Review** - Upon delivery of the report, the customer will meet with the Documentum Consultant and/or Principal to review the report, to verify acceptance of the agreed upon performance objectives and metrics, and to resolve questions regarding the report.
- **Performance Analysis and Tuning Report Delivery** - The Baseline Performance Analysis and Tuning Report delivers the documented results of the analysis activities and recommendations for performance improvement. More importantly, it will document the measurements of the metrics defined in the Workshop, which will provide a basis for continued system maintenance.

This Service Offering Description details the type and extent of the services that will be provided by *EZR Consulting*, and is attached to the Statement of Work Short Form that describes the pricing, payment and delivery terms for this engagement. The services described herein will be delivered by appropriately skilled *EZR Consulting* resources, as described in the Estimated Engagement Resources and Fees section of this document.

Requirements for any functionality and/or services by *EZR Consulting* that are not specified in this Service Offering Description prior to the beginning of the engagement will be addressed by the agreed upon Change Control Process. Activities beyond the scope of this engagement as described will require negotiations for additional services, and may adversely impact the delivery costs and timelines specified in this document.

3 Engagement Activities, Deliverables and Assumptions

The following activities constitute the delivery model for the Performance Tuning Service Offering. *EZR Consulting* and <Customer Name> will agree upon the set of activities as specified in this Service Offering Description before executing the Statement of Work for this engagement.

3.1 Workshop Conference

This activity includes discovery of current business purpose of the system, its current configuration and performance issues, and the determination of the final engagement goals and deliverable.

Activities:

- Workshop Presentation – the Consultant and/or a Consulting Principal will facilitate a workshop session where the appropriate customer resources provide the required system specifications and performance parameters to be used for analysis purposes. The required system information will include:
 - The system's business purpose and objectives, and any business service level agreement successes/failures to date;
 - Acceptance criteria for the improvement of performance metrics;
 - The project or system history, present status and future needs or plans;
 - The estimated number of users (i.e. contributors and consumers) in each location and use cases of concern for this engagement;
 - The amount of content expected initially on the system (i.e. number, average size, min/max size)

- The expected content growth rate per day, month and/or year;
- The current hardware and software configuration, including machine model, number and speed of CPUs, memory, mass storage amount and configuration, OS version and patch level, physical location, network connectivity, bandwidth and latency between servers and from servers to clients;
- Tools and standards in place or planned for system backup, restore and monitoring.
- Performance Goal and Criteria Definition – after presentation of the existing system parameters and performance objectives, the workshop discussion will focus on the definition of specific performance goals for this engagement that will be analyzed and included in the final report. The Consultant and the customer resources will clearly discuss and outline these items for inclusion in the draft content of the report. Non-goals will also be stated, where appropriate.

Deliverables: A draft outline of the report with the agreed upon goals and system configuration parameters completed.

Assumptions:

- In cases where the required system information is not available or able to be determined by customer resources, the Documentum Consultant will extend the activities specified in the System Analysis section to collect the required information.
- The engagement does not include architecture analysis, evaluations of hardware or software, or installation and configuration of Documentum products, though this can be arranged in the SOW as a separate line item for additional cost.
- The customer has convened a team of technical and business *Subject Matter Experts* who will be available on a priority basis to participate in the Workshop Conference, and on call throughout the rest of the engagement. These resources include experts in business requirements, network, O/S administration, RDBMS administration, client desktop administration and Documentum/application administration that can provide the necessary information for the workshop as identified in this section of the document.
- All non-disclosure agreements and customer security requirements are in place and/or satisfied before the engagement begins.
- An *EZR Consulting*-provided Webex connection to systems needing interrogation - under customer supervision - will be permitted for any of the activities of this engagement, if done remotely.
- The customer subject matter experts can participate via an *EZR Consulting*-provided telephone conferencing service in group discussions and presentations for any of the activities of this engagement, if conducted remotely.
- The Project Team assembled by the customer has previously received the recommended level of training in Documentum product fundamentals and content management concepts to support the performance assessment effort.
- The customer will provide a work area for the *EZR Consulting* Consultants if/when they are on site. This work area should include a desk, access to a printer, access to the internet (to support a VPN connection), a working telephone and a laptop projector.

3.2 System Analysis and Tuning

This activity consists of the *EZR Consulting* Consultant gathering actual data from the system, and executing tests to obtain performance metrics either on-site or remotely, under the supervision of customer personnel.

Activities:

- Data Collection - The *EZR Consulting* Consultant will gather data to verify and document the configuration and operating status of the target system.
- Analysis and Testing - The *EZR Consulting* Consultant will execute specific tests, queries, and reports to determine performance characteristics of the system and document the results for final recommendation and review.

Deliverable: The completed, preliminary report, provided in PDF format

Assumptions:

- If needed, the customer has or can provide a development or QA environment onto which a copy of the production system can be duplicated to develop and test performance enhancements if necessary. Failure to provide this resource may reduce the reliability or certainty of recommendations in the final report.

3.3 Performance Analysis and Tuning Report Review

This activity consists of a conference session between the *EZR Consulting* Consultant and the appropriate customer resources. The *EZR Consulting* Consultant will review the entire, preliminary report for the purpose of verifying the clarity and completeness of the document with the customer team.

Activities:

- Report Review Conference - The *EZR Consulting* Consultant will present and review the report with the customer personnel who previously participated in the workshop.

Deliverables: The conference session and the preliminary report in PDF form.

Assumptions:

- The required customer personnel are available to participate in the conference session.
- The customer personnel have been provided with an opportunity to review the preliminary report in preparation for the conference session.

3.4 Performance Analysis and Tuning Report Delivery

The *EZR Consulting* Consultant will prepare and deliver the final report, including any issues or corrections identified during the Review Conference.

Activities:

- Final Report Preparation – The *EZR Consulting* Consultant will correct or complete any report sections that require modification on the basis of the review conference, by collaborating with the customer team as necessary. The report will then be delivered to the customer lead in final, pdf form.

Deliverable: the final Performance Analysis and Tuning Report in PDF format.

Assumptions:

- Delivery of the final Performance Analysis and Tuning Report constitutes acceptance by the customer and completes the engagement.
- Customer subject matter experts will be available as needed to support completion of the final report by the *EZR Consulting* Consultant.

4 Estimated Engagement Duration

The relative, baseline duration of these engagement activities, as indicated in this Service Offering Description, are summarized as follows:

TASK DESCRIPTION	ESTIMATED DURATION
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<i>TASK DESCRIPTION</i>	<i>ESTIMATED DURATION</i>
Workshop Conference	1 Day
System Analysis and Tuning	5 Days
Baseline Performance Report Preparation and Review	3 Days
Baseline Performance Report Delivery	1 Day

The proposed schedule for this engagement is based on an estimated delivery timetable, as indicated in the table below:

<i>PERFORMANCE TUNING SERVICE OFFERING</i>											
<i>Day:</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>	<i>6</i>	<i>7</i>	<i>8</i>	<i>9</i>	<i>10</i>	
Workshop Conference	→										
System Analysis and Tuning		→	→	→							
Baseline Report Review			→	→	→						
Baseline Report Delivery					→						

5 Estimated Engagement Resources and Fees

The estimated engagement hours, billing rates and total fees include:

<i>Consulting Team Resources</i>	<i>Estimated Hours **</i>	<i>Hourly Rate **</i>	<i>Totals</i>
EZR Consulting Consultant	40	225	\$9,000
Travel Time - Consultant		112.5	\$0
Travel Expenses	N/A	N/A	
<i>Estimated Project Totals</i>	40	---	\$9,000

Notes:

- This estimate is provided for a time-and-material engagement, based on a standard Documentum Consulting implementation approach. Mutually agreed upon changes to the scope of this engagement can be achieved through standard change control processes and may affect the overall cost and timeline.*
- Travel time and costs, plus reasonable living expenses are calculated and billed separately. Consulting services that require travel time will be charged at 50% of the applicable consulting rate for travel time.*
- Because this is a time and materials engagement, the engagement times specified in this Services Description are estimates. Therefore, any time not spent on this project will not be billed.*