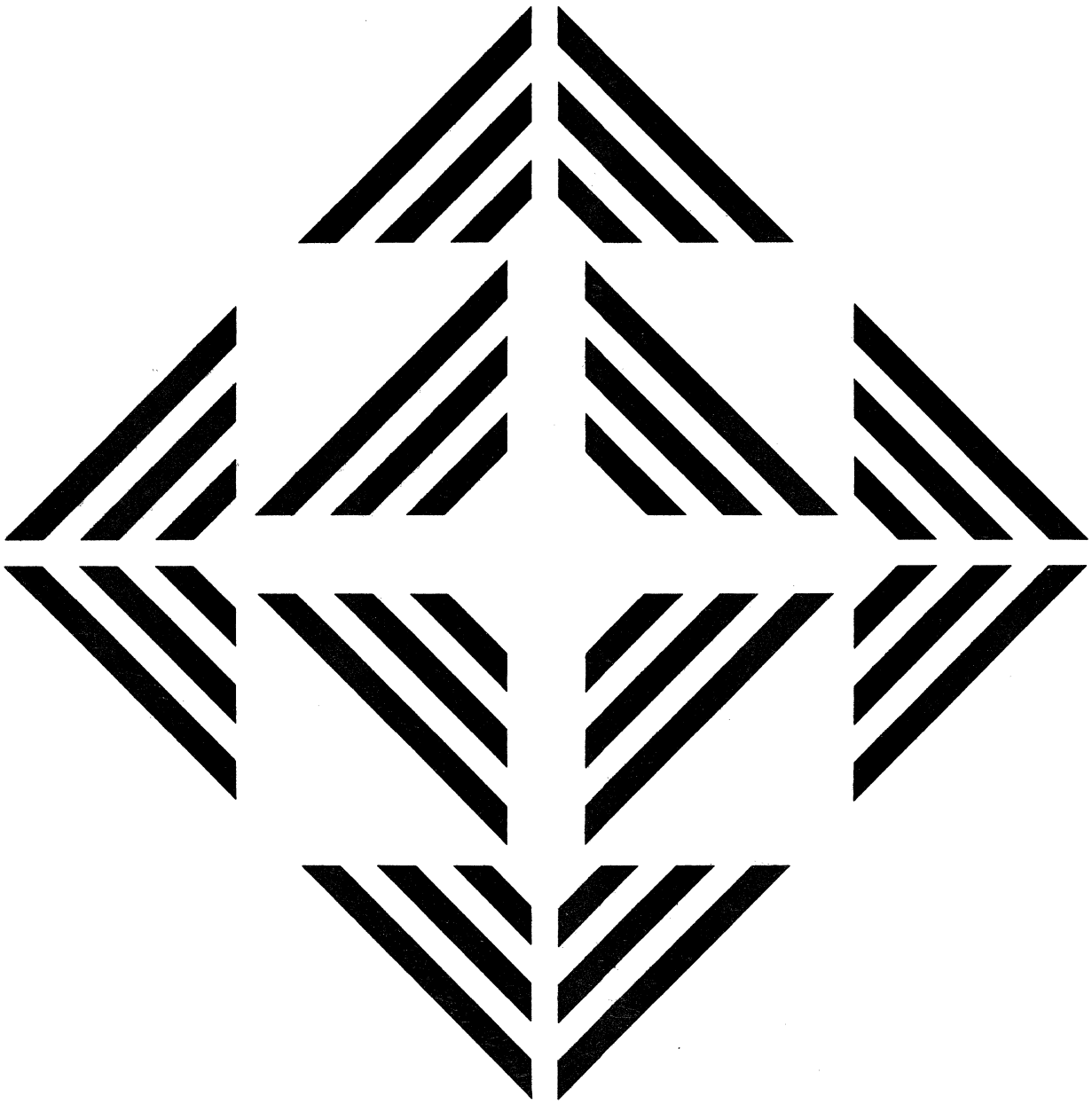
IBM GG24-1572-0

IBM 5520 ADMINISTRATIVE SYSTEM
OFFICE SYSTEMS IMPLEMENTATION

CUSTOMER GUIDE



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Use this publication GG24-1572-0 only for the purpose stated in the Preface.

GG24-1572-0

Insert Tabs for the
IBM 5520 Administrative System
Customer Guide

Enclosed in this package are a binder, contents of the Customer Guide, and insert tabs. The contents are to be inserted into the binder provided. The set of insert tabs is to be used with the Customer Guide. These tabs will help you locate Appendices quickly.

Preface

Introduction

Office Systems Implementation - IBM 5520 - Customer Guide is a practical "hands-on" manual that will provide you with the information necessary to organize, develop, and carry out an effective office systems implementation process, along with references to more detailed information contained in regular IBM reference manuals. You will need to refer to those manuals for specific "how to" instructions.

Purpose Of This Guide

This Guide is designed to help you implement office systems by providing:

- An overview of the implementation process
- A comprehensive checklist of activities to be accomplished during implementation
- Task descriptions with references to appropriate detailed information in other IBM publications
- Aids for assigning tasks
- Aids for scheduling implementation activities
- Aids for monitoring and controlling the implementation

Who Should Use It

This Guide is designed for customers who are planning and installing IBM 5520 Administrative System(s).

The primary audience for this Guide is an Office Systems Project Team, which consists of some or all of the following functions:

- Project Manager
- Systems Implementer
- Text, File, and DD (Document Distribution) Implementer(s)
- Lead Operator(s)
- Training Specialist

See "Task number 1.3: Select Your Office Systems Project Team" for detailed descriptions of the Project Team Functions.

When To Use It

Before using this Guide, you should attend an IBM Office Systems orientation session with the IBM Systems Engineer. Use of this Guide is reviewed at that session.

All members of the Project Team should complete specific preliminary education before implementation planning begins. Appropriate education is discussed under "Task Number 1.4: Complete preliminary education of your Office Systems Project Team."

How To Use It

You should have two copies of this Guide, as you will distribute sections of the document when you assign tasks. If you need a second copy, contact the IBM Systems Engineer.

The Guide is organized as follows:

- Detailed task descriptions (Chapters 1 - 11)
- Project Team Organization (Appendix A)
- Security (Appendix B)
- Naming Standards (Appendix C)
- Backup and Recovery (Appendix D)
- Help Desk (Appendix E)
- IBM Support Structure (Appendix F)
- Glossary (Appendix G)
- Planning Aids and Forms (Appendix H)

To use this Guide:

- Review the detailed task descriptions
- Perform preliminary tasks
- Assign tasks and prepare task descriptions
- Distribute task descriptions
- Plan implementation schedule
- Monitor and control project

Review the detailed task descriptions. As you review the task descriptions in the Guide, keep in mind the following points:

- The sequence of the tasks reflects a logical rather than a chronological order. Most of the implementation planning tasks will be taking place at the same time.
- Some of these tasks are more complicated than others. Some are included because of the high frequency of errors in past.

- You may not be performing all the tasks, as you may or may not have ordered all the products, software, and hardware discussed in this Guide.

- The task descriptions provide a comprehensive overview of the implementation process. Most of the technical information is found in other IBM publications that are only referenced here.

Perform Preliminary tasks. There are several tasks you must perform before the the other Project Team members can begin their activities. These tasks, discussed in Chapter 1, are:

- Validate the equipment and software order

- Obtain publications needed for planning

- Select your Office Systems Project Team

- Complete preliminary education of your Office Systems Project Team

- Develop overall implementation strategy

- Establish improvement goals

- Establish project control

- Assign implementation tasks

- Develop working relationship between office systems and data processing personnel

- Hold Office Systems Project Team kickoff meeting

Assign tasks and prepare task descriptions. Use the Project Control Worksheets in the back of this Guide to help you assign specific implementation tasks. After tasks have been assigned, prepare an implementation packet for each Project Team member by removing the appropriate task descriptions from the second copy of this Guide.

Distribute task descriptions. Task descriptions are passed out to Project Team members at the Project Team kick-off meeting.

Plan implementation schedule. The information on the Project Control Worksheets can be used as a starting point for developing an implementation schedule.

Monitor and control the project. The Implementation Planning Chart in Appendix H can be used as a tool for monitoring and controlling the project.

CONTENTS

Chapter 1: Initiate Office Systems Projects

Introduction

Your major responsibilities as Project Manager begin after you attend the Office Systems orientation session with the IBM Systems Engineer. This chapter provides task descriptions that will help you:

- Validate the equipment and software order
- Obtain publications needed for planning
- Select your Office Systems Project Team
- Complete Preliminary Education of your Office Systems Project Team
- Develop an overall implementation strategy
- Establish improvement goals
- Establish Project Control
- Assign implementation tasks
- Develop a working relationship between office systems and data processing personnel
- Hold an Office Systems Project Team kickoff meeting

Task Number 1.1: Validate The Equipment And Software Order

Process

The steps in carrying out this task are:

- Review equipment and software order
- Decide if a modification is required
- Modify the order as necessary

Review Equipment and Software Order

The IBM Systems Engineer is responsible for verifying the equipment order. The list of hardware and software currently installed and the hardware and software on order should have been reviewed at the orientation session. The Systems Engineer will have identified any problems with internal hardware or software compatibility and determined if the original order will support your planned applications.

Decide If A Modification Is Required

Based on the IBM Systems Engineer's evaluation, decide if any modifications to the original order are required. Modifications might be required to:

- Add hardware or software not included in the original order
- Rectify hardware inconsistencies (such as not enough ports to handle the terminals on order)
- Rectify incompatible software releases
- Increase the capacity of the system to meet planned applications

Modify The Order As Necessary

If you have determined that modifications are required, work with the Systems Engineer to make sure the necessary steps are taken to modify the order.

Result

- ☐ An accurate and complete order.

Schedule Planning

This task should have been completed at the orientation session.

Task Number 1.2: Obtain Publications Needed For Planning

Process

The steps in carrying out this task are:

- Identify publications needed for planning
- Order publications

Identify Publications Needed For Planning

To develop a list of the publications you need to plan your office system implementation, do one of the following:

- Perform the detailed analysis of publication requirements discussed under "Task number 4.1: Identify publications requirements" in Chapter 4.

- Enter an initial System Library Subscription Service (SLSS) under the following interest profiles:

  - IBM 5520 Administrative System
  - Each type of display terminal and printer on order
  - Each program product to be installed on host system (if IBM 5520 is to be Host attached)

SLSS and entering an SLSS subscription are discussed under Task Number 4.2: Enter an SLSS Subscription in Chapter 4.

Order Publications

Obtain the publications needed for planning as soon as possible by doing one of the following:

- Authorize purchase of the publications in a letter to IBM, listing the manuals by title and order number
- See your IBM Systems Engineer for information or ordering publications.
- Enter an SLSS subscription

Result

- ☐ An order placed for the publications you need to plan your office systems implementation.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start date: _____
- Completion date: _____

Task Number 1.3: Select Your Office Systems Project Team

Process

The steps in carrying out this task are:

- Read Appendix A
- Review Project Team Requirements and determine what is needed for your team
- Select personnel for Systems Implementer function
- Select personnel for Text, File, and DD (Document Distribution) Implementer function
- Select personnel for Lead Operator function
- Select personnel for Training Specialist function

Read Appendix A

Considerations involved in organizing the Project Team, as well as the impact of ongoing Project Team functions on your current organization, are discussed in Appendix A, "Project Team Organization." Read this material before you begin your selection of Project Team Members.

Review Project Team Requirements

The Office System Project Team is responsible for planning, installing, and implementing your office systems. To be effective, Project Team members must develop the required technical knowledge and expertise. It is also important for team members to maintain cooperative working relationships with other personnel in your organization who will use and benefit from the system. Selection of qualified personnel is the first step in a successful office systems implementation.

You will need to select personnel for the following Project Team functions:

- Systems Implementer
- Text, File, and DD Implementer(s)
- Lead Operator(s)
- Training Specialist(s)

Some locations may choose to combine one or more Project Team roles. In many organizations, the Project Manager is also the Systems Implementer. Also, frequently the Text Implementer function and File Implementer function can be combined. The size and nature of your organization, and the scope of your planned installation, may necessitate more than one Text, File, DD Implementer, or several Lead Operators. Review the responsibilities of each function to determine the number of individuals required for your team and how the responsibilities should be assigned.

Select Personnel For Systems Implementer Function

The Systems Implementer has the overall responsibility for applications, standards, procedures, and policies. This Implementer will become the technical expert for office applications in your organization.

The person selected to be Systems Implementer may have to grow into this role, as this position may be a new one for many organizations. Success with office systems depends to a considerable extent on the activities within this function. It is of the utmost importance that you select and dedicate highly qualified personnel for this role. Most Systems Implementer's activities are carried out in conjunction with Text, File and DD Implementers.

The Systems Implementer will:

- Develop expertise in all office systems products to be installed
- Develop a comprehensive plan and ongoing applications strategy for your organization
- Develop and maintain overall standards, naming conventions, and procedures
- Define systems defaults
- Determine security requirements
- Coordinate with the Project Manager, the Text, DD and File Implementers, and the Lead Operators
- Staff the Help Desk (end user assistance, trouble shooting, and interface to the IBM Support Team)
- Coordinate system backup/recovery

The Systems Implementer should have the following background and experience:

- Knowledge of office procedures, policies, and requirements
- A general understanding of data processing systems, including:
  - General DP Systems knowledge
  - Document Distribution and Host Communications (if IBM 5520s are planned to be host attached)
- Ability to communicate technically with DP personnel and non-technically with end users
- Systems management education or experience is useful, but not absolutely required

Select Personnel For Text Implementer Function

Responsibilities of the Text Implementer usually include:

- Understand text requirements in each user department to be installed
- Define, document, implement, and maintain text applications
- Develop and maintain:
  - text standards and procedures
  - document formats for applications
  - document and operator profiles
- Define text related defaults
- Design and coordinate advanced text functions (such as automated correspondence)
- Be the text interface to the Project Manager, Implementers, and Lead Operators
- Coordinate with Systems Implementer on backup/recovery considerations for office text applications

A Text Implementer should have the following background and experience:

- An excellent knowledge of office procedures, policies, and text requirements
- A general understanding of data processing concepts and systems
- Ability to communicate technically with DP personnel and nontechnically with end users

Select Personnel For File Implementer Function

A Files Implementer has responsibility for office file applications, procedures and policies.

Usual responsibilities are to:

- Understand office file application requirements for each user department to be installed
- Define, document, implement and maintain office file applications
- Determine file formats, content, and sequence requirements
- Develop and maintain office file procedures
- Develop and maintain File Descriptions and files that are common to multiple departments/locations
- Develop and maintain Stored File Procedures for office file applications that may be complex, repetitively used, or must be consistent between multiple departments/locations
- Be the office file interface with the Project Manager, Implementers, and Lead Operators
- Coordinate with Systems Implementer on backup/recovery considerations for office file applications.

A Files Implementer should have the following background and experience:

- Good working knowledge of file requirements for an office
- Good understanding of file characteristics and considerations
- General understanding of data processing systems
- Ability to communicate technically with DP personnel and non-technically with end users

Select Personnel For DD (Document Distribution) Implementer Function

If you have document distribution on your IBM 5520, you will need a DD Implementer. If not, some functions will need to be assigned to another Implementer.

The DD Implementer should have traditional systems programmer data processing responsibilities. The DD Implementer should:

- Understand the document distribution requirements for each department to be installed
- Select, order, track, and install communication facilities, (e.g., modems, communication lines)
- Define, implement, and maintain the network including considerations such as:
  - number of locations
  - document distribution volumes between locations
  - desired delivery times
  - types of communication lines
  - use of store and forward nodes (locations)
  - use of IBM S/370 Host if IBM 5520 is host attached
  - use of remote devices
- Develop standard naming convention for the network
- Develop and maintain required communication profiles for all locations
- Develop, document, and maintain document distribution procedures
- Interface with PTT and/or vendors
- Do problem determination as required
- Do performance measurement and tuning as required
- Be the DD interface to the Project Manager, Implementers, and Lead Operators
- Interface to DP problem management and network management functions
- Coordinate with Systems Implementer on backup/recovery considerations for document distribution and communication facilities

A DD Implementer should have the following background and experience:

- Must be an experienced systems programmer
- Must have experience in the planning, installation, and maintenance of DP communication systems such as:
  - Data Base/Data Communications
  - System Network Architecture
  - Distributed data processing
  - Other DP Systems
- Ability to communicate technically with DP personnel and non-technically with end users

Selected Personnel For Lead Operator Function

Lead Operators have traditional lead operator responsibilities and may have supervisory responsibilities.

Usual activities are to:

- Implement standards and procedures at the department level
- Control of daily operations such as:
  - start and stop the system
  - device maintenance (e.g., diskette, magnetic card unit)
  - maintain profiles
  - production logs, if used
  - problem determination
  - coordinate system workflow
  - provide technical assistance to other secretaries
- Design, implement, and maintain additional text and office file applications
- Serve as point of contact with end users for general help or troubleshooting
- Interface with the Help Desk for problem resolution and expert assistance

The Lead Operator will also work closely with the Project Manager and Implementers during the IBM 5520 planning and installation to:

- Determine equipment placement based on custom or production work environments
- Do CSU (customer setup) of IBM 5520 hardware (except the 5525 System Unit, IBM 5258 Printer, and Mag Card Unit which are installed by IBM CE)
- Install IBM 5520 software
- Develop display/device operator profiles
- Develop printer and diskette profiles
- Develop and document procedures manuals
- Perform application interviews
- Design and implement text and office file applications

A Lead Operator should have the following background and experience:

- Aptitude for handling the automated system
  - Facility for picking up new procedures
  - Ability to solve problems
- Willingness to take on new challenges
- General understanding of the applications to be implemented
- May take on a supervisory role because of the responsibilities involved, so should meet your organization's criteria for selecting supervisors

Select Personnel For Training Specialist Function

The Training Specialist plans, coordinates and/or conducts training.

Responsibilities of the Training Specialist usually include:

- Using input from Implementers, develop and document an education plan for:

  - End User (Principal)
  - Managers of Secretaries
  - Secretaries (Entry/Revision Operators)

  Education plan considerations should include:

  - Workshops for IBM self study courses
  - IBM taught classes
  - In-house classes

  Covering such things as:

  - Device operations
  - Systems functions
  - Applications
  - Document Distribution
  - Naming conventions, standards and procedures

- Schedule, maintain, and monitor the education plan
- Conduct workshops for IBM self study courses and in-house classes

The Training Specialist should have the following background and experience:

- A good knowledge of office procedures, policies, and text requirements
- A general understanding of data processing concepts and systems
- Teaching experience or an aptitude and interest in teaching
- Ability to communicate technically with DP personnel and non-technically with end users

DOCUMENT INFORMATION ON PROJECT TEAM AND IBM SUPPORT PERSONNEL

Enter your selections for the Project Team below. You should also enter the IBM personnel who are supporting your implementation effort.

Project Team

Name	Title	Function	Phone

IBM Support Personnel

Result

☐ A complete, competent Project Team for implementing your office systems.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start Date: _____
- Completion Date: _____

Task Number 1.4: Complete Preliminary Education Of Your Office Systems Project Team

Process

The steps in carrying out this task are:

- Review preliminary education requirements
- Identify appropriate IBM classes and self-study courses
- Schedule IBM classes and obtain self-study courses
- Monitor education

Review Preliminary Education Requirements

Preliminary education must be scheduled for the:

- Project Manager
- Systems, Text, File, and DD Implementers
- Training Specialist
- Lead Operator(s)

Preliminary education should emphasize the features and functions of the program product and hardware being installed. This knowledge is essential for initial implementation planning.

Identify Appropriate IBM Classes And Self-Study Courses

Preliminary education should include appropriate IBM-administered classes and IBM self-study courses. As Project Manager, you should have attended an office systems presentation at IBM for an overview of all IBM Office Systems products. Project Team members should also attend one of these presentations.

IBM office systems classes include:

- Introduction To the IBM 5520 Administrative System (Y2383)
- IBM Text Administrative System Implementation/Operations (S2517)
- IBM 5520 Administrative System File Implementation/Operations (S2544)
- IBM 5520 Administrative System Document Distribution Network Design (S2522)
- IBM 5520 Administrative System Introduction for Operating Personnel (A2522)

IBM self-study courses include:

- IBM 5520 Administrative System Display/Device Operating Instructions (SR30-0484)
- IBM 5520 Administrative System Operations (SR30-0615)
- IBM 5520 Administrative System File Design and Operations (SR30-0490)
- IBM 5520 Administrative System Display/Device Training Administrator's Guide (SR30-0536)

If your IBM 5520(s) are to be IBM S/370 host attached, to identify IBM classes appropriate for host software program products to be installed, contact your IBM Systems Engineer.

Schedule IBM Classes And Obtain Self-Study Courses

The chart on the following page identifies the appropriate education for each Project Team member. Enter the names of all project personnel on the chart, then develop a schedule for attendance in the IBM classes and obtain the appropriate self-study courses. Before you finalize the schedule, be sure to determine the availability of IBM classes. Up-to-date information on the classes is available from your IBM Systems Engineer.

See your IBM Systems Engineer for information on ordering self-study courses.

Monitor Education

Make sure all preliminary education is scheduled and completed before you conduct the project kick-off meeting.

Result

- ☐ Completed Preliminary Education Planning Chart.
- ☐ A completed IBM Education Order Form, G120-3076, scheduling all IBM classes and requesting all self-study courses appropriate for preliminary education of the Project Team.
- ☐ Completion of preliminary education by all Project Team Members.

Schedule Planning

Before you begin this tasks, project your start and completion dates.

- Start date: _____
- Stop date: _____

PRELIMINARY EDUCATION PLANNING CHART

PROJECT FUNCTION	NAME	IBM OFFICE SYSTEMS CLASSES					SELF-STUDY COURSES				DATE	LOCATION
		A2522	Y2383	S2517	S2544	S2522	SR30-0615	SR30-0484	SR30-0536	SR30-0490		
PROJECT MANAGER												
SYSTEMS IMPLEMENTER												
TEXT IMPLEMENTER												
FILES IMPLEMENTER												
DOCUMENT DIST IMPLEMENTER												
LEAD OPERATOR(S)												

Task Number 1.5: Develop Overall Implementation Strategy

Process

The steps in carrying out this task are:

- Review implementation strategy considerations
- Review IBM 5520 support
- Review host considerations (if IBM 5520(s) will be IBM S/370 host attached)
- Consider the number of people available to perform planning, installation, and end-user training activities
- Establish implementation strategy

Review Implementation Strategy Considerations

A basic consideration is whether to install and implement IBM 5520 applications (text, files, and document distribution) in parallel or serially. This decision will be based on several factors, including:

- Nominal deadlines for getting the IBM 5520(s) installed and in production
- The number of people available to perform planning and installation activities
- Relative benefits of a phased versus all-at-once implementation

Many organizations have chosen to install text applications initially, followed by files applications. Then, they install document distribution, followed by attach to IBM S/370 host (if that is being done).

Other overall strategy considerations include:

- Possible requirements for functional tests or evaluation periods
- Role of a temporary text and files system for use in hands-on training or applications development
- Tradeoffs between immediate and long-range results

Establish Implementation Strategy

The development of an overall implementation strategy requires fairly detailed knowledge of the applications and products involved. You should develop your strategy in conjunction with your Systems, Text, File, and DD Implementer(s) after they have completed their preliminary office systems education.

Task Number 1.6: Establish Improvement Goals

Process

The steps in carrying out this task are:

- Review guidelines for establishing improvement goals
- Develop goals
- Document goals

Review Guidelines for Establishing Improvement Goals

Guidelines should have been created to provide various methods for measuring the success of your office systems, including:

- A method for establishing benchmarks by measuring the time spent doing various office activities
- "Improvement factors" that can be used to estimate improvement in various office activities
- A method for developing your own improvement factors
- Short-term success criteria
- Long-term success criteria

If you have not reviewed the guidelines, you should do so before continuing.

Develop Goals

Use the guidelines for short-term and long-term success criteria provided to help you develop improvement goals. Short-term success criteria include:

- User receptivity
- Ease of use
- Volume of use
- Perception of increased productivity by users

Long-term success criteria include:

- Productivity improvement
- Cost reduction
- Improvement in quality of product
- Increased service to management and professionals

Document Goals

Document the goals you establish for comparison with improvement after implementation.

Result

- ☐ Documented goals for improvements in your office after office systems are implemented.

Schedule Planning

- Start date:_____
- Completion date:_____

Task Number 1.7: Establish Project Control

Process

The steps in carrying out this task are:

- Consider appropriate IBM 5520 classes
- Establish task delegation control
- Establish schedule control
- Establish project status review procedure
- Implement control

Establish Task Delegation Control

Project Control Worksheets for the 11 major implementation activities are included in Appendix H of this Guide. Use these Worksheets to:

- Record all task assignments
- Make sure all appropriate task descriptions are given to the assigned Project Team members
- Make sure all estimated start and completion dates are received and documented

Establish Schedule Control

The estimated start and completion dates you document on the Project Control Worksheets can be used to prepare an overall schedule for implementation. Transfer the worksheet information to the Implementation Planning Chart included in Appendix H. After the implementation schedule has been established, the Implementation Planning Chart can be used to monitor and control the project.

Establish Project Status Review Procedure

Use copies of the Implementation Planning Chart for reporting the status of the project to Project Team members and upper management.

Implement Control

Use the aids included in this Guide, incorporating them into your organization's existing project control procedures, to monitor and control the project.

Result

- ☐ An operational method for monitoring and controlling implementation of office systems.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start date:_____
- Completion date:_____

Task Number 1.8: Assign Implementation Tasks

Process

The steps in carrying out this task are:

- Review tasks
- Assign tasks
- Prepare task descriptions

Review Tasks

Review all tasks descriptions in Chapters 2-11 of this Guide.

Assign Tasks

The Project Control Worksheets in Appendix H lists tasks you will need to assign. You should add to it any additional tasks that are unique to your organization. The Project Team function that should perform each task is identified by abbreviations as follows:

- PM = Project Manager
- SI = Systems Implementer
- TI = Text Implementer
- FI = File Implementer
- DDI = Document Distribution Implementer
- TS = Training Specialist
- LO = Lead Operator

Using the Project Team functions listed on the Worksheets as a guide, assign each task to a specific Project Team member. Several tasks are associated with more than one Project Team function, for example, TI/LO. Successful completion of these tasks requires the combined efforts of the Project Team functions listed. Team members should be informed of the need to work together on these tasks, but overall responsibility for each task should be assigned to one person. List all assignments on the Worksheets. At this time, list only the name of the person assigned to each task.

Prepare Task Descriptions

After you have assigned all implementation tasks, prepare a packet of task descriptions for each Project Team member. Each packet should contain:

- Task descriptions for the tasks assigned to that person
- Appropriate appendices for the assigned tasks

Prepare these packets by removing task descriptions and appendices from the second copy of this Guide. Use the Project Control Worksheets to make sure all tasks have been assigned and each Project Team member's packet is complete.

Result

- ☐ Project Control Worksheets listing the person assigned to each task.
- ☐ A packet of task descriptions for each Project Team member.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start date: _____
- Stop date: _____

Task Number 1.9: Develop Working Relationship Between Office Systems and Data Processing Personnel

If your IBM 5520(s) are IBM S/370 host attached, this section is very important.

Process

The steps in carrying out this task are:

- Review considerations for a productive relationship
- Develop strategy

Review Considerations for a Productive Relationship

A productive working relationship between office systems and data processing personnel is essential, not only for installation of the new systems but also for the ongoing success of the implementation.

As Project Manager, you have a primary responsibility to ensure that a productive relationship develops. Your efforts might include:

- Briefing of data processing personnel on the nature of the proposed system from an applications point of view
- Thorough description for the services data processing will be expected to provide
- Briefing of office systems personnel on the services data processing will be providing and the support end users will be expected to provide
- Discussion of the communications that will be required between office systems and data processing personnel
- Development of a "friendly" dialogue to minimize the problems that can result from people trying to use a nontechnical, non-DP vocabulary to discuss needs with data processing personnel

Develop Strategy

Your strategy for developing a good working relationship might include the following:

- Invite data processing representatives to key implementation planning meetings
- Keep data processing personnel advised of your requirements
- Develop a relationship that encourages friendly dialogue and a team approach to solving problems

Result

- ☐ A productive working relationship between office systems and data processing personnel.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start date:_____
- Completion date:_____

Task Number 1.10: Hold Office Systems Project Team Kickoff Meeting

Process

The steps in carrying out this task are:

- Review kickoff meeting requirements
- Prepare for kickoff meeting
- Schedule kickoff meeting
- Conduct kickoff meeting

Review Kickoff Meeting Requirements

A project kickoff meeting is essential for the effective initiation of any project as significant as an office systems implementation. The kickoff meeting should:

- Brief all in attendance on the nature and scope of the project and the overall schedule
- Brief Project Team members on specific duties and responsibilities
- Initiate specific implementation tasks
- Motivate personnel to accomplish all implementation tasks on schedule
- Initiate a good working relationship among Project Team members

You should ensure that the personnel for the following functions are in attendance at the meeting:

- Systems Implementer(s)
- Text, File, and DD Implementer(s)
- Lead Operator(s)

End users and management personnel in the department(s) where office systems will be implemented should also be briefed. Because of the specific topics that must be addressed with Project Team members, you may wish to hold a separate kickoff meeting for personnel who are not directly involved in project activities.

Prepare for Kickoff Meeting

Before scheduling the kickoff meeting, you should confirm the following:

- All Project Team members have completed required preliminary education
- All publications required for planning have been obtained
- All implementation tasks have been assigned
- You have prepared a packet of task descriptions for each Project Team member

After you have confirmed the above, prepare an agenda for the meeting. The following items should be included in your agenda:

- Provide Project Team members with an overview of the entire implementation process. You may want to use the Implementation Planning Charts in Appendix H to present this overview
- Review the overall responsibilities of each Project Team function
- Review overall schedule and current target dates for major milestones
- Distribute and explain the task descriptions prepared for each Project Team member
- Direct Project Team members to review assigned tasks and to report back with estimates of start and completion dates for each task
- Describe availability of appropriate publications

Schedule Kickoff Meeting

Schedule a date, time, and location for the meeting, and inform all who are to attend. Confirm the availability of flipcharts, overhead projectors, screens, or other materials required for the meeting.

Conduct Kickoff Meeting

In the course of the kickoff meeting, make sure you accomplish the following:

- All Project Team members are fully briefed on the nature and scope of the project
- All Project Team members are aware of their specific roles and responsibilities
- All task descriptions are distributed to assigned personnel and noted on the Project Control Worksheets
- All Project Team members are given specific dates to report back with estimates for start and completion dates for each assigned task
- All Project Team members are motivated to accomplish assigned tasks on schedule

Result

- ☐ Effective initiation of your office systems project.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start date:_____
- Completion date:_____

Task Number 1.11: Develop End User Support

Process

The steps in carrying out this task are:

- Review user requirements for conversion
- Plan implementation schedule
- Conduct end user orientation meetings

Review User Requirements for Conversion

It is essential that the end user be considered in planning the conversion to office systems. Be certain to inform the end user of changes that are to be made and encourage them toinput their requirements for the conversion.

- Ask for input from end users as to what tasks should be converted first.

- Develop specific items with the user, such as:

  - format, usage and retention period of documents
  - workflows of the system
  - present and future volumes
  - turnaround time requirements under the existing system and requirements for the planned implementation

Plan Implementation Schedule

After the tasks have been identified:

- Prioritize the tasks
- Determine the best implementation order
- Prepare a formal schedule

Conduct End User Orientation Meetings

Office Systems implementation will go much smoother if the end users feel they are an integral part of the planning and implementation. A meeting or meetings should be scheduled which present:

- The environment to be implemented
  - Include:
    IBM 5520 concepts and terminology overview
    Data processing concepts and terminology overview
    Demonstration of hardware/software features
    Demonstration of applications
    Workflows overview
- A discussion of the tasks tobe performed for the secretaries, clerical and principals for educational purposes
- An opportunity for the end user to make modifications to the plan

Result

- ☐ An implementation plan that includes end user requirements and involvement.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start date:_____
- Completion date:_____

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Chapter 2: Plan Physical Environment

Introduction

Installation of the IBM 5525 processor and associated devices, and the associated display and printer terminals, requires a detailed physical planning effort. This chapter provides task descriptions that will help you:

- Identify physical planning requirements
- Check existing facilities
- Develop floor plans
- Order and install cables and electrical outlets
- Verify availability of communications equipment
- Order furniture and office alterations

Plans for the physical environment must accommodate both the physical requirements of the equipment and the need to organize work areas for maximum operator efficiency. You should work closely with your facilities people and department managers in developing these plans.

Your facilities people should be able to provide you with blueprints or floor plans for the areas where equipment is to be installed, help you plan any office alterations necessary for equipment placement or electrical purposes, and give you estimates of the lead time required to accomplish any needed alterations. Your facilities people will also be called upon to do much of the actual work when you implement your plans.

A plan for the physical environment must consider the number of IBM 5253/5254 display stations, their placement, which are shared, and which is the master display station, etc. In developing a floor plan, addressing the "human factors" is just as important as planning cables and loops. Department managers and supervisors should be consulted for advice on placement of printers and display stations and overall organization of the work areas.

Task Number 2.1: Identify Physical Planning Requirements

Process

The steps in carrying out this task are:

- Review physical planning requirements
- Review physical planning manuals

Review Physical Planning Requirements

Physical planning requirements must be identified for the IBM 5525 System Unit, associated devices such as an IBM 5321 Magnetic Card Unit, and all display stations and printers. These requirements include:

- Space requirements
- Electrical requirements
- Environmental requirements
- Furniture requirements
- Telephone requirements
- Physical Security requirements

Space requirements are determined by the dimensions of the equipment, the need to access the equipment for operation and maintenance, and the space needed for desks or tables where display stations will be situated.

Electrical requirements include power source, appropriate dedicated circuits, electrical outlets, proximity to outlets, and cabling length limits.

Environmental requirements include air conditioning, lighting, and noise control.

Furniture requirements include desks or tables to support display stations and furniture for storing documentation and publications. The furniture selected for display station operators should accommodate recommended seat and desk heights, as well as storage requirements. You should also consider furniture to provide storage for supplies required for printer operation.

It is recommended that you install a telephone with access to outside lines near each IBM 5525 system unit. IBM Customer Engineers will need these lines to perform diagnostic tests.

Consideration should be given to physical security in placement of equipment and diskette storage.

Review Physical Planning Manuals

IBM provides physical planning manuals for all IBM hardware to be installed. These manuals identify most of the physical planning requirements. Make sure you have the appropriate manuals for each piece of equipment you have ordered.

- IBM 5520 Administrative System Introduction, GC23-0702
- IBM 5520 Administrative System Planning Considerations and Management, GC23-0716
- IBM 5520 Administrative System Installation Manual - Implementation Planning, SC23-0713
- IBM 5520 Administrative System Physical Planning - Cable Labels, GX23-0702*
- IBM 5520 Administrative System Physical Planning Template - English, GX23-0703*
- IBM 5520 Administrative System Physical Planning Template - Metric, GX23-0704*
- IBM 5520 Administrative System Installation Manual - Licensed Program Installation and Implementation, SC23-0745

* Note: Cable labels and physical planning templates can be ordered as a group by requesting form number SBOF-3981.

** Note: All publication materials referenced in this Guide are U.S. publication numbers. Consult your IBM Representative for publication numbers applicable to your country.

If equipment other than that for which publications are listed above is to be installed, consult the IBM systems engineer for titles and order numbers.

Result

- ☐ Identification of physical planning requirements for all equipment to be installed.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 2.2: Check Existing Facilities

Process

The steps in carrying out this task are:

- Inspect facilities
- Obtain blueprints

Inspect Facilities

Determine the resources and facilities currently available for installation of the IBM 5525 processor and associated devices, as well as display stations and printers. This will help you determine what furniture must be ordered and the extent of office alterations required. You should check:

- Floor space available
- Electrical facilities, including available power and number, type, and location of outlets
- Environmental considerations, including availability and rating of air conditioning, available lighting, and current noise-control factors
- Available furniture, including desks, chairs, and storage cabinets
- Telephones required for IBM Customer Engineering diagnostic tests

Check desks and chairs to make sure they will meet recommended heights for display station operators.

Obtain Blueprints

Ask your facilities people if they have up-to-date blueprints or floor plans for the areas where office systems equipment is to be installed. These will help you develop a floor plan that details the placement of each piece of equipment. If blueprints or current floor plans are unavailable, consider developing rough floor plans of the areas with which you are concerned. These floor plans should include:

- Permanent and temporary walls
- Floor space dimensions
- Door and closet locations
- Type and location of outlets

Your facilities people should be able to assist you in developing these rough floor plans.

Result

- ☐ Current documentation of existing facilities and resources available.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 2.3: Develop Floor Plans

Process

The steps in carrying out this task are:

- Review floor plan requirements
- Identify IBM templates
- Develop floor plan
- Identify need for office alterations

Review Floor Plan Requirements

Your floor plan should specify where each piece of equipment is to be installed. Optimize use of available space, and organize the work area so that equipment can be operated and maintained effectively. Consider the placement of display stations, and other factors affecting the layout and organization of your operation. In developing a floor plan, these "human factors" are very important. Department managers and supervisors should be consulted for advice on the placement of printers and display stations and the overall organization of work areas.

Be sure to specify the location and type of electrical outlets needed and to incorporate restrictions on cable lengths. You may want to include desks, tables, chairs, file cabinets, and other necessary furniture in your plan.

Identify IBM Templates

IBM provides clear acetate templates that are very useful in determining equipment placement. These templates include:

- IBM 5520 Administrative System (English) GX23-0703
- IBM 5520 Administrative System (Metric) GX23-0704

Templates are ordered in the same way as publications, so the Project Team member responsible for ordering publications can order the necessary templates. If equipment other than that for which templates are listed above is to be installed, consult the physical planning manual for that particular piece of equipment to find the template title and order number.

Develop Floor Plans

Use the appropriate templates to develop floor plans for all office systems equipment to be installed. Use a scale of 10 mm = 0.5 m, or 1/4 in. = 1 ft. Be sure to address all floor plan requirements discussed in this task description.

Identify Need for Office Alterations

As you develop your floor plan, you may notice placement problems. There may not be an electrical outlet where you want to place a display station, nor adequate floor space for the work area you would like to establish. Note these problems, and make a list of the office alterations required to make your floor plan effective.

Result

- ☐ Detailed floor plan specifying the placement of all office systems equipment.
- ☐ List of any necessary office alterations.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 2.4: Order and Install Cables and Electrical Outlets

Process

The steps in carrying out this task are:

- Identify cable and electrical requirements
- Order and install required cables and electrical outlets
- Test cables and outlets

Identify Cable and Electrical Requirements

Cables used to connect IBM 5520 devices to each other, or other associated devices, are not supplied with the specific units ordered. You must identify and order cables required for connecting the IBM 5520 system devices to the IBM 5520 System Unit, communication terminals, modems, and common carrier equipment. The cable-order option of the CF5520 configurator run on HONE produces the required information in a form readily usable for ordering cables. This option should be run by your IBM Representative.

IBM display stations and printers are attached in the following ways:

- Twinaxial cable, such as the IBM 5253, IBM 5254, IBM 5258, and IBM 5219
- Direct connection, such as the IBM 6670 when a 40-foot cable limitation is honored

You need to identify the quantity and type of each type of cable your installation will require. Use the configurator option, your floor plan, and the appropriate physical planning manuals to identify your requirements for all coaxial cables.

Order and Install Required Cables and Electrical Outlets

As soon as you have identified your requirements, order the cable, connectors, accessories, and outlets and install them.

Cables and accessories are not stocked in the IBM Branch Office.

Test Cables and Outlets

Test the installed twinaxial cable, and electrical outlets to eliminate them as a source of problem after the system is installed. Be sure to plan test procedures and obtain a Continuity and Relay Tester or equivalent test equipment for checking your loops.

Result

- ☐ Installation and testing of all required twinaxial cable, and electrical outlets.

Schedule Planning

Before you being this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 2.5: Verify Availability of Communications Equipment

Process

The steps in carrying out this task are:

- Identify requirements
- Verify availability of required equipment

Identify Requirements

If your IBM 5520(s) are to be installed for standalone document distribution, peer-to-peer network design, and/or IBM S/370 host attached, you must identify all requirements for:

- Modems
- Communication lines
- Communication controllers or integrated communication adapters

IBM Office Systems applications often deal in full pages and multipage, documents, whereas traditional data processing applications usually deal in short fields of data. This requirement can lead to different traffic rates. At the system end, there is a requirement for communication controllers or integrated communication adapters. You need to verify the number of ports, the proper line speeds, the ability to accept additional ports, and so on. Total traffic through the controller, both initially and after applications mature, must be within the capability of the controller. This also includes IBM 5520 system printers, other IBM 5520 systems in a network, and other word processing systems communicating as remote devices.

The lead times to obtain larger model communication controllers, various internal features, and additional ports are usually very long. In order to avoid delays, make sure that all communications equipment has been adequately sized, and is installed or on order. Check with the IBM Systems Engineer for possible aids available being used to size equipment.

If modems must be ordered, you may want to see that they meet the requirements for participating in the problem diagnosis offered by various IBM network management program products.

Verify Availability of Required Equipment

Check your system to verify that all required equipment is available. If any additional equipment is needed, make sure it is ordered, installed, and tested before delivery of the IBM Office Systems hardware.

Result

- ☐ Verification of availability of all required modem, communication lines, and communication controllers or integrated communication adapters.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 2.6: Order Furniture and Office Alterations

Process

The steps in carrying out this task are:

- Order furniture
- Order office alterations

Order Furniture

Determine the furniture you need to order based on the requirements detailed in your floor plan and the furniture currently available. Your order should include all required:

- Desks
- Tables
- Chairs
- Files
- Storage cabinets and shelves
- Telephones

IBM offers a line of office furniture designed specifically for electronic office systems. IBM's Synergetix Furniture is adjustable, extendable, and modular, enabling you to accommodate the particular needs of your office and your operators. For more information on Synergetix Furniture, contact your local IBM Information Records Division Representative.

Order Office Alterations

You should have (from "Task number 2.3: Develop floor plans") a list of the office alterations required to make your floor plan effective. This work may require a long lead time. Be sure to place the necessary orders early enough so that all alterations are completed before the hardware is delivered.

Result

- ☐ An office environment ready for the installation of all office systems equipment.

Schedule Planning

Before you being this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Chapter 3. Develop Education Plan

Introduction

Project Team members receive preliminary education at the beginning of the project to help them plan, install, and implement your office systems. The development of an ongoing education plan should supplement the preliminary education of the Project Team and address the needs of end users.

This chapter provides task descriptions that will help you:

- Plan education for Project Team members and end users
- Plan for hands-on access to a system
- Schedule education
- Develop end user courses
- Implement your office systems education plan

Task Number 3.1: Plan Education for Project Team Members and End Users

Process

The steps in carrying out this task are:

- Review education requirements
- Plan education for Project Team members
- Plan education for end users

Review Education Requirements

Ongoing education should take place during and after the implementation process.

Training of Project Team members should complement the preliminary education but need not be as comprehensive. Training of end users may be selective - for example, deferring advanced IBM 5520 functions until basic functions have been mastered.

Plan Education for Project Team Members

Project Team members should already have received the preliminary education discussed under "Task number 1.4: Complete preliminary education for your Office Systems Project Team" in Chapter 1. New Project Team members and personnel assigned to ongoing Text Administrator and Lead Operator roles should complete the same classes and self-study courses.

To plan the ongoing education of Project Team members, consult the IBM System Engineer, to identify any new classes and self-study courses that may be appropriate. Incorporate these with the requirements listed in the Preliminary Education Planning Chart (Task number 1.4), and use the comprehensive list to schedule training of new personnel assigned to Project Team functions.

Plan Education for End Users

End users who are not directly involved in implementation planning do not need the same kind of preliminary education as Project Team members. However, end users do need to be trained to operate the systems.

NOTE: All course/publication materials referenced in this Guide are U.S. course/publication numbers. Consult your IBM Representative for course/publication numbers applicable to your country.

IBM-office systems classes include:

- Introductions to the IBM 5520 Administrative System (Y2383)
- IBM Text Administrative System Implementation/Operations (S2517)
- IBM 5520 Administrative System File Implementation/Operations (S2544)
- IBM 5520 Administrative System Document Distribution Network Design (S2522)
- IBM 5520 Administrative System - Introduction for Operating Personnel (A2522)

IBM Self-study courses include:

- IBM 5520 Administrative System Display/Device Operating Instructions (SR30-0484)
- IBM 5520 Administrative System Operations (SR30-0615)
- IBM 5520 Administrative System File Design and Operations (SR30-0490)
- IBM 5520 Administrative System Display/Device Training Administrator's Guide (SR30-0536)

Result

- ☐ An ongoing training curriculum for Project Team members and end users.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 3.2: Plan for Hands-On Access to a System

Process

The steps in carrying out this task are:

- Review access requirements
- Review access options
- Schedule access

Review Access Requirements

Hands-on access to operating IBM Office Systems is required to:

- Develop applications
- Complete end user training

An operating system is a valuable aid in the development of applications and application design. Hands-on access to the system during implementation planning should be arranged for those responsible for developing applications.

Hands-on access to operating systems is also required for training end users. The IBM 5520 self-study courses contain hands-on exercises designed to be performed at a display station.

Review Access Options

You can arrange hands-on access to an operating system by:

- Planning for access after your system is installed
- Scheduling time at an IBM facility

Schedule Access

Investigate the options for arranging hands-on access to operating IBM Office Systems, and develop a plan for scheduling all personnel with hands-on requirements. You should make the necessary plans or arrangements now to ensure that access is available when needed.

Result

☐ Hands-on access to operating IBM Office Systems.

Schedule Planning

Before you being this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____

- Completion date: _____

Task Number 3.3: Schedule Education

Process

The steps in carrying out this task are:

- Review scheduling requirements
- Confirm availability of IBM classes
- Schedule attendance at IBM classes and obtain self-study courses
- Develop education schedules

Review Scheduling Requirements

Since IBM classes are offered on specific dates, you will need to coordinate an individual's work schedule with the dates when classes are available. Self-study courses can be taken at almost any time, except for those requiring hands-on access to a system. You will also need to schedule any in-house training developed by your organization.

Confirm Availability of IBM Classes

Be sure to verify the availability of IBM classes before finalizing any schedules. You can obtain up-to-date information on class availability from your IBM Systems Engineer.

Schedule Attendance at IBM Classes and Obtain Self-Study Courses

Consult your IBM Systems Engineer for information about ordering courses and for classes in your country.

Develop Education Schedules

Develop an education schedule for each employee requiring office systems training. The schedule should include dates, times, and locations for:

- Attending IBM classes
- Taking IBM self-study courses
- Taking in-house training

You may want to use the Preliminary Education Planning Chart to help you develop the schedules. This chart is discussed under "Task Number 1.4: Complete preliminary education of your Office Systems Project Team" in Chapter 1.

Result

- ☐ A schedule for each employee identifying the dates, times, and locations for attending IBM classes and completing self-study courses and in-house training to be conducted at your facility
- ☐ Schedules for IBM class and a form requesting self-study courses
- ☐ Completed forms for ordering publications

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 3.4: Develop End User Courses

Process

The steps in carrying out this task are:

- Identify training requirements specific to your organization
- Develop courses

Identify Training Requirements Specific to Your Organization

The education supplied by IBM addresses IBM-specific needs, such as installing and using IBM hardware and software products. In addition, you may need to develop training for your display operators and document originators that addresses the specific standards and procedures developed for your applications.

Training requirements specific to your organization might include:

- Your organization's standards and procedures for office systems applications, such as naming, backup and recovery, and security standards and procedures
- Application designs and documentation specific to your organization
- Tailoring of IBM materials to train end users gradually or selectively, so that end users learn only those system functions they are going to use
- Procedures specific to your organization, such as ordering supplies, whom to call in case of trouble, where to find the reference materials, and how Help Desk works

When identifying appropriate education for end users, be sure to consider the following distinctions:

- Principals or document originators versus keyboard operators
- Text files versus document distribution applications
- IBM 5520 versus host applications
- System functions versus applications

Compile a list of IBM and in-house courses that should be taken by end users. Use this list as a guide for scheduling education for all end users.

Develop Courses

Training requirements will vary from department to department within your organization, based on the standards and procedures you document for your procedures manuals. Training should be developed in conjunction with these manuals for an effective, integrated training package.

To be effective, your training should be:

- Designed to accomplish specific performance objectives
- Written for a specific audience
- Easy to use
- Updatable
- Evaluated and refined regularly

Result

- ☐ In-house training that integrates office systems into your organization's practices and policies.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 3.5: Implement Your Office Systems Education Plan

Process

The steps in carrying out this task are:

- Obtain approvals for IBM education
- Implement training
- Monitor education
- Evaluate effectiveness

Obtain Approvals for IBM Education

- You should consult your IBM Systems Engineer for complete information on scheduling classes and obtaining publications on your country.

Implement Training

Implement training as soon as you have identified the appropriate education and determined schedules for your personnel. Be sure to assist trainees who may have problems with schedules, travel, or access to training resources.

Monitor Education

Monitor trainees to ensure that all required education is completed. You may want to develop a checklist to document trainees' completion of each required IBM class, self-study course, or in-house program.

Evaluate Effectiveness

Develop an ongoing policy of evaluating the effectiveness of the training program. Obtain feedback from end users, supervisors, and Project Team members. If the training does not appear to be totally effective, you may want to schedule additional IBM education or develop new in-house training.

Result

- ☐ Trained Project Team members and end users with the knowledge and expertise necessary to achieve maximum results from your office systems.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Chapter 4. Obtain Publications

Introduction

Much of the technical information required for implementation of your office systems is contained in IBM reference manuals and self-study courses. It is important to identify and order the critical publications as soon as possible, so that planning and installation can proceed on schedule. Publications required for everyday operation and maintenance of the system must also be ordered, and a plan for updating and distributing these publications must be developed.

This chapter provides task descriptions that will help you:

- Identify publications requirements
- Enter an SLSS subscription
- Develop a publications update and distribution plan

Task Number 4.1: Identify Publications Requirements

Process

The steps in carrying out this task are:

- Review reference manual and self-study course requirements
- Determine quantities required
- Order publications

Review Reference Manual and Self-Study Course Requirements

Your ability to effectively plan, install, and use IBM Office Systems depends on information contained in a number of IBM reference manuals and self-study courses.

The Publications Worksheets on the following pages list most of the publications you will need and identify the likely users for each. Review the publications listed and eliminate those that do not apply to hardware or software products you are installing. If you feel you need additional publications, consult your IBM Systems Engineer.

If you identify additional publications, enter them in the blank spaces provided on the last worksheet.

NOTE: All course/publication materials referenced in this Guide are U.S. course/publication numbers. Consult your IBM Representative for course/publication numbers applicable to your country.

PUBLICATIONS WORKSHEET

TITLE	ORDER* NUMBER	AUDIENCE						QUANTITY REQUIRED
		PM	TA	LO	SI	ER	TS	
INTRODUCTORY AND GENERAL INFORMATION								
IBM 5520 System Introduction	GC23-0702	X	X		X		X	
IBM 5520 Installation Manual-Implementation Planning plus TNL SN20-9671	SC23-0713	X			X		X	
IBM 5520 Planning Considerations and Management	SC23-0716	X	X		X		X	
IBM 5520 Licensed Program Specifications	GC23-0735				X			
IBM 5520 Installation Manual-Licensed Program Installation/Implementation	SC23-0745			X	X		X	
IBM 5520 Files Design & Operations Self Study	SR30-0535		X		X		X	
IBM 5520 Display/Device Training Administrator's Guide-Self Study	SR30-0536			X	X		X	
General Information Manual for IBM 6670 Information Distributor	G544-1006	X	X	X			X	
PLANNING AND INSTALLATION								
IBM 5520 Concepts and Facilities	GC23-0707	X	X	X	X		X	
IBM 5520 Planning Considerations and Management	SC23-0716	X	X		X		X	
IBM 5520 Installation Manual-Files Design & Stored Procedures	SC23-0737		X	X	X		X	
TEXT OPERATOR INFORMATION								
IBM 5520 Reference Manual plus TNL SN20-9670	SC23-0704		X	X			X	
IBM 5520 Menu Abbreviations	GX23-0706			X		X	X	
IBM 5520 Operator's Guide	SC23-0715			X		X	X	
IBM 5520 Remote Device Operator's Guide	SC23-0746			X			X	
IBM 5257 Printer Operator's Guide	GA23-1004			X		X	X	
IBM 5258 Printer Operator's Guide	GA23-1005			X		X	X	
5219 Printer Customer Setup Procedure	GA23-1008			X	X		X	
IBM 5219 Printer Operator's Guide	GA23-1009			X		X	X	
IBM 5520 Display/Device Operating Instructions-Self Study	SR30-0484			X		X	X	
IBM 5520 Text Implementation/ Operations-Student Workbook	SR30-0487		X	X			X	

LEGEND

PM = Project Manager
TA = Text/Files/DD Administrator
LO = Lead Operator
SI = Systems Implementer
ER = Entry-Revision Operator
TS = Training Specialist

***NOTE**: All course/publication materials referenced in this Guide are U.S. course/publication numbers. Consult your IBM Representative for course/publication numbers applicable to your country.

PUBLICATIONS WORKSHEET

TITLE	ORDER NUMBER	AUDIENCE						QUANTI REQUIR
		PM	TA	LO	SI	ER	TS	
TEXT OPERATOR INFORMATION (CONTINUED)								
IBM 5520 System Operations Self-Study	SR30-0615			X		X	X	
IBM 5520 Files Implementation/ Operations Student Workbook	SR30-0735		X	X			X	
Forms Ruler	SC20-1918			X		X	X	
IBM 6670 Information Distributor Operating Instructions	S544-0574			X		X	X	
LEAD OPERATOR INFORMATION								
Form Design Reference Guide for Printers	GA24-3488		X	X			X	
IBM 5520 Reference Manual plus TNL SN20-9670	SC23-0704			X			X	
IBM 5520 Menu Abbreviations	GX23-0706			X		X	X	
IBM 5520 Operator's Guide	SC23-0715		X	X		X	X	
IBM 5520 Remote Device Operator's Guide	SC23-0746			X		X	X	
IBM 5257 Printer Operator's Guide	GA23-1004			X			X	
IBM 5258 Printer Operator's Guide	GA23-1005			X			X	
IBM 5219 Printer Customer Setup Procedure	GA23-1008			X			X	
IBM 5219 Printer Operator's Guide	GA23-1009			X			X	
IBM 5520 Display/Device Operating Instructions-Self Study	SR30-0484		X	X		X	X	
IBM 5520 System Operations Self-Study	SR30-0615			X		X	X	
IBM 5520 Files Implementation/ Operations- Student Workbook	SR30-0735		X	X			X	
COMMUNICATIONS								
IBM 5520 S/370 Host Attach Programmers Guide	SC23-0710				X			
IBM 5520 Remote Device Operators Guide	SC23-0746			X		X	X	
DIAGNOSIS AND PROBLEM DETERMINATION								
IBM 5525 System Unit Error Analysis Guide	SY20-8509			X				
IBM 5520 Messages and Recovery Aids plus TNL SN20-9667	SC23-0733			X		X	X	
IBM 6670 Information Distributor Codes and Messages for SNA Environment	S544-3003			X	X		X	
IBM 6670 Information Distributor Keyboards and Fonts Catalog	S544-3009		X	X	X		X	

PUBLICATIONS WORKSHEET

TITLE	ORDER NUMBER	AUDIENCE						QUANTITY REQUIRED
		PM	TA	LO	SI	ER	TS	
PHYSICAL PLANNING								
IBM 5520 Installation Manual-Physical Planning	GA23-1002				X		X	
PHYSICAL PLANNING TEMPLATES								
IBM Administrative System (English)	GX23-0703	X					X	
IBM Administrative System (Metric)	GX23-0704	X					X	
MISCELLANEOUS								
The Considerations of Physical Security in a Computer Environment	G520-2700	X	X				X	
The Considerations of Data Security in a Computer Environment	G520-2169	X	X					
Staying in Charge	G505-0058	X	X				X	

PUBLICATIONS WORKSHEET

Use the blank worksheet below for any additional publications you have identified. Enter the title, order number, and audience.

TITLE	ORDER NUMBER	AUDIENCE					QUANTITY REQUIRED
		PM	TA	LO	SI	EU	

Determine Quantities Required

After you have reviewed the manuals and courses you need, determine how many copies of each should be ordered. Some considerations for determining quantities are:

- The number of people likely to need each publication or self-study course
- Establishment of a central library so people can share copies
- Cost of publications and self-study courses

You may only need single copies of certain publications, such as planning manuals or program product installation manuals. On the other hand, you may want several copies of end user manuals, such as the self-study courses. In large accounts, establishing a central library is one way of providing sufficient manuals for a large number of people without having to order personal copies. The cost of publications can be obtained from your IBM Representative.

Use the Publications Worksheets to help you determine how many copies of each manual and self-study courses should be ordered.

Order Publications

Reference manuals and self-study courses are ordered in different ways. To order reference manuals, do one of the following:

- Authorize purchase of the publications in a letter to IBM, listing the manuals by title and order number
- Enter a System Library Subscription Service (SLSS) subscription

SLSS and entering an SLSS subscription are discussed under "Task number 4.2: Enter an SLSS subscription" in this chapter.

Result

- ☐ An order placed with IBM for a specific number of reference manuals and self-study courses.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 4.2: Enter an SLSS Subscription

Process

The steps in carrying out this task are:

- Review SLSS
- Prepare SLSS subscription
- Enter SLSS subscription

Review SLSS

The System Library Subscription Service, or SLSS, is an optional IBM service that provides shipment and automatic updating of the documents you need to plan, program, install, operate, and maintain your systems. You can subscribe to SLSS two ways:

- By interest profile
- By order number

The profile method provides an initial shipment of documents related to the interests you have identified, revisions and updates to the shipped documents, and new publications related to your interests. The order number method provides an initial shipment of specific documents, plus revisions and updates of those documents.

The two methods are used together when multiple copies of a document are desired, or when you want documents that are not available by profile, such as program listing, logic manauls, general texts, and catalogs. Whether you subscribe by profile, order number, or both, you must complete an SLSS subscription form to define and authorize your customized subscription.

Prepare SLSS Subscription

You should meet with the IBM Systems Engineer to prepare or modify your SLSS subscription. Review the hardware and software to be installed, and determine the interest profiles and specific order numbers to enter on the SLSS Subscription Form, G120-1816. The result will be a customized SLSS subscription that meets your specific publications requirements.

Enter SLSS Subscription

Prepare an SLSS Subscription Form, G120-1816, with the IBM Systems Engineer and submit it to IBM. For more information on SLSS, terms and conditions, and entering an SLSS subscription, see Entering an SLSS Subscription, G320-1561.

Result

- ☐ A completed SLSS Subscription Form, G120-1816, submitted to IBM.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 4.3: Develop a Publications Update and Distribution Plan

Process

The steps in carrying out this task are:

- Review publications update and distribution considerations
- Develop plan

Review Publications Update and Distribution Considerations

Up-to-date reference materials are necessary for the daily operation and maintenance of your office systems. You need to develop a plan to keep your reference materials updated and to distribute the updated materials to appropriate personnel.

Your publications update and distribution plan should address the following considerations:

- Role of Technical Newsletters and major revisions provided by SLSS
- Incorporating revisions into in-house publications
- Distributing revised documents to appropriate personnel
- Guarding against premature distribution of revised publications (for example, publications updated for a new release of a software program product that has not yet been installed on the system)

Develop Plan

Develop a comprehensive publications update and distribution plan that addresses all relevant considerations. The plan should include specific procedures for updating materials and controlling distribution.

Result

- ☐ Documented procedures for updating and distributing all reference materials.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Chapter 5. Order Supplies

Introduction

When an organization switches from a manual system to an automated system, or from one automated system to another, the requirements for office supplies may also change. This chapter provides task descriptions that will help you:

- Identify necessary supplies
- Establish ordering procedures

Task Number 5.1: Identify Necessary Supplies

Process

The steps in carrying out this task are:

- Identify general requirements
- Identify supplies for IBM 5258 printer
- Identify supplies for the IBM 5219 printer
- Identify supplies for IBM 6670 information distributor
- Identify diskette requirements
- Identify miscellaneous requirements

Identify General Requirements

In order to determine the supplies you will need, you must first identify the number and types of printers planned for your installation. Verify the printers you have on order.

Identify Supplies for IBM 5258 Printer

You will need to order ink, and possibly paper for the IBM 5258 printer.

Printer ink:

- IBM Part No.: 1354320
- Quantity: 4 per box
- Yield: Approximately 195,000 characters per bottle
- Recommended order: A general recommendation is one box per printer, but consider the volume of printing to be done.

Print fonts:

TYPE	STYLE	PITCH	PART NO.	FEATURE
011	COURIER 10	10	1354639	7811
012	PRESTIGE PICA	10	1354764	7812
013	ARTISAN 10	10	1354770	7813
014	ARTISAN 10 (CAPS)	10	1354897	7822
015	BOOKFACE ACADEMIC	10	1354704	7824
018	COURIER 10 ITALIC	10	1355010	7825
085	COURIER 12	12	1354762	7810
086	PRESTIGE ELITE	12		STANDARD
087	LETTER GOTHIC	12	1354768	7809
159	BOLDFACE NO.2	PSM	1354760	7816
160	ESSAY	PSM	1354766	7814
161	ARCADIA	PSM	1354641	7815
192	SYMBOLS		1355514	7830

- Recommended order:

  - If 10-pitch printing will be standard, order Courier 10 or Prestige Pica for each printer, and a 12-pitch font per printer if you have 12-pitch applications.

  - If 12-pitch printing will be standard, order one Prestige Elite, Letter Gothic, or US Accounting for each printer, and one 10-pitch font per printer if you have 10-pitch applications.

Two print fonts are provided free of charge with each IBM 5258 order.

Source:

To order printer ink and print fonts from IBM, contact the IBM Representative.

Paper:

The IBM 5258 printer can use only single sheets and also prints envelopes. Single sheets and envelopes are fed by internal automatic feed devices.

The single-sheet paper used with the IBM 5258 printer is the regular stationery and forms you now use. There are no new requirements for ordering this type of paper.

The recommended order for paper and envelopes is a six month's supply, based on your projected use. In ordering paper and envelopes, you should also consider quantity discount options and the possibility of long lead times for delivery.

Identify Supplies for IBM 5219 Printer

You will need to order ribbons, print wheels, and possibly paper for the IBM 5219 printer.

Printer ribbons:

- IBM Part No.: 1299463
- Quantity: 6 per box
- Yield: quality mode: 1,000,000 characters; saver mode: 3,000,000 characters.
- Recommended Order: A general recommendation is two boxes per printer, but consider the volume of printing to be done. You may want to take advantage of quantity discounts and order a year's supply at one time.

Print wheels:

One print wheel is provided free of charge with the IBM 5219 printer. Additional print wheels may be ordered by part number.

Contact IBM Representative for list of available print wheels.

In addition Courier (10 pitch) is available with the following special character sets:

- IBM Part No.: 1439654 Accounting
  1439653 EBCDIC
  1439652 ASCII

- Recommended order:

Be sure to order at least one backup print wheel for each of the type styles you will be using most frequently.

Source:

To order printer ribbons from IBM contact the IBM Representative.

Paper:

The IBM 5219 printer can use both single sheets and continuous form paper if the tractor feed has been ordered. Single sheets can be inserted manually or used with the optional two-drawer auto sheet feed device. Contact your IBM representative for information on ordering the sheet feeder and tractor feeder devices.

You can most likely use your current plain bond paper and letterhead in the sheet feed device. Review the paper specification with your IBM Representative to insure that you can use your current paper supply.

If you order the tractor feed device, the continuous forms you need to order depend on your specific application designs, and may include:

- Letter, legal, or other sizes
- Continuous-form letterhead, envelopes, or other special stationery

Identify Supplies for IBM 6670 Information Distributor

You will need to order fonts for the IBM 6670, and you may need to order toner, paper, offset masters and transparencies. IBM recommends that the following supplies, or supplies that meet IBM specifications, be used with the IBM 6670 to ensure quality copying and printing, and to help maintain machine reliability.

Fonts:

IBM 6670 type fonts are available in 10-pitch, 12-pitch, proportional spacing and Data 1 rotated for reduction of data to print lengthwise. Only six fonts can be resident in the IBM 6670 at one time. Four fonts are provided free of charge with each IBM 6670 ordered. Additional fonts can be ordered for a one time charge, plus IBM Customer Engineering installation charges. For an up-to-date listing of available fonts and pricing infor-mation, contact your IBM Representative.

IBM High Yield Cartridge Toner:

- IBM Order No.: 1669081
- Recommended order: three for each IBM 6670 (one for installation and two replacements).

Paper:

- 20-pound to 24-pound bond

- 8 to 8-7/8 inches, wide, and 10.5, 11, 12, 13, or 14 inches long (Note: Only 8-inch paper can be 10.5 inches long; all other combinations are possible.)

- IBM recommends that electrophotographic paper meeting IBM specifications be used for best performance. To obtain these specifications, contact the IBM branch office.

- Recommended order: The recommended order for paper is a six months' supply, based on your projected use. In ordering paper, you should also consider quantity discount options and the possibility of long lead times for delivery.

IBM Offset Master (Sheet):

- IBM Order No.: 166391
- Quantity: 500 per box
- Recommended order: Based on your projected use

Source:

To order fonts, toner, offset masters, and transparencies, contact your local IBM Representative.

Identify Diskette Requirements

You will need to order diskettes and diskette labels, and you may wish to order diskette file boxes.

2D diskettes:

2D diskettes can be used for document archiving and stand-alone dump/restore of the system.

- IBM Part no.: 1766872 (256-byte)
- Quantity: 10 per box
- Recommended order: A general recommendation is three boxes per IBM 5520, but take into account the amount of backup and diskette archiving you plan to do.

Diskette labels:

- IBM Part No.: 1669961
- Quantity: 300 labels per envelope, six envelopes per packet.
- Recommended order: One envelope

Diskette file box:

- IBM Part No.: 1475940
- Quantity: One file box holds 30 diskettes

Source:

To order diskettes, labels, and file boxes, contact the IBM Representative.

Identify Miscellaneous Requirements

Spare keys:

Optional keylocks are available for much of the IBM Office Systems hardware. If keylocks were ordered for your equipment and you wish to order spare keys, contact your local IBM Representative.

Templates:

Optional operator templates are available for use at the display station for the keyboard for menu abbreviations, keyboard characters, and document creation.

Result

- ☐ A list of all office supplies required for implementation of your office systems.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project manager.

- Start date: _____
- Completion date: _____

Task Number 5.2: Establish Ordering Procedures

Process

The steps in carrying out this task are:

- Review requirements for ordering procedures
- Determine method for ordering supplies
- Establish ordering procedures
- Place initial order

Review Requirements for Ordering Procedures

Ordering procedures for an automated office system should not differ greatly from existing ordering procedures. These typically include:

- A regular inventory of supplies in stock
- Consideration of lead times for receiving supplies
- Forms for requesting supplies
- Procedures for approving requests for supplies through appropriate purchasing and accounting departments
- Development of relationships with primary and secondary suppliers

Determine Method for Ordering Supplies

Several different options are available for ordering supplies:

- Centralized ordering through one department or data processing
- Localized ordering by department
- Tapping into an existing ordering process
- Establishing a new ordering process

New ordering requirements should be incorporated as much as possible into your organization's existing ordering procedures.

Establishing Ordering Procedures

After the method has been determined, formal ordering procedures should be developed. These procedures should be documented and any forms to be used should be prepared, so that ordering procedures can be implemented along with the system.

Place Initial Order

Because of the possibility of long lead times, it may be necessary to place an initial order for supplies early in the implementation planning process. The initial supplies you need to order are discussed under "Task number 5.1: Identify Necessary Supplies" in this chapter. The new ordering procedures need not be in place for this initial order.

Result

- ☐ Documented procedures for ordering office systems supplies.
- ☐ Preparation of new forms, if required.
- ☐ Placement of initial order for supplies.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start dates: _____
- Completion dates: _____

Chapter 6. Develop Applications Plan

Introduction

The development of an applications plan is an essential part of the implementation process. Your organization's business goals must be defined in terms of specific applications and specific application designs.

This chapter provides task descriptions that will help you:

- Identify applications
- Establish applications priorities
- Design applications
- Establish a cutover plan
- Develop an applications test plan
- Coordinate text and nontext applications

Task Number 6.1: Identify Applications

Process

The steps in carrying out this task are:

- Identify text applications
- Identify file applications
- Determine current applications for conversion
- Identify Document Distribution Requirements
- Review operational feasibility
- Review technical feasibility
- Determine applications to be developed

Identify Text Applications

To determine your text applications, you must analyze the various operations in your organization. Production and custom text requirements require different approaches. You may decide to organize all production typing from several departments into a centralized production area or to keep custom work in specialized, local departments.

To identify text applications, you should:

- Review applications proposed during initial office systems planning
- Analyze your current documents
- Analyze principal/document originator activities
- Conduct applications interviews
- Gather sample formats and paper
- Determine current work flow

Identify File Applications

To identify file applications, you should:

- Review applications proposed during initial office system planning
- Develop a description of the hardware environment and personnel who will be using the hardware
- Conduct a file applications survey
- Review file applications descriptions
- Review casual usage (activities that are not part of predefined and described file applications)
- Determine total applications requirements

The key reference for developing file applications is IBM 5520 Administrative Systems Files Design and Stored Procedures SC23-0737.

NOTE: HIGHLIGHT = Determine Current Applications for Conversion

To determine current manual or automated format/document processing which should be considered for conversion to the IBM 5520 system:

- Analyze format, utilization, and need for automation

- Identify text/files applications to be converted and operator responsibility for creation, input and maintenance.

- Define how to convert, i.e., rekey, stored format, convert from mag card and/or another word processor, etc.

- Review operational and technical feasibility for files tasks and end user educational requirements, i.e., initial files orientation versus indepth education.

- When identifying file applications, determine turnaround time requirements for documents to be produced.

Identify Document Distribution Requirements

Identify what remote devices and/or other systems (IBM 5520, Host, etc.) you will have requirements to communicate with and what type of communication equipment will be needed.

To identify document distribution requirements, you should:

- Review document distribution requirements proposed during initial office systems planning
- Develop a network or point to point layout
- Identify communication equipment and protocol compatibility
- Review document distribution procedures and security requirements

Review Operational Feasibility

Review the applications to make sure they can be implemented successfully. Verify that the proposed applications will benefit the departments where they are to be installed.

Review Technical Feasibility

Determine whether or not the proposed applications are technically feasible with the systems you are installing. Review all applications to make sure they can be implemented.

Determine Applications to be Developed

After you have identified all the applications that are both operationally and technically feasible, compile a list of applications to be developed for each department. You may want to use the Applications Planning Chart on the following page. Note that the "Date Planned" column should not be filled in at this time. This information is added when you complete "Task number 6.2: Establish Applications Priorities" in this chapter.

Result

☐ List of the applications to be developed and converted for implementation.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

APPLICATIONS PLANNING CHART

DEPARTMENT	TEXT APPLICATIONS	FILES APPLICATIONS	DOC. DIST. APPS.	DATE PLANNED	ADD (A) CONVERT (C)*

*For applications which are to be converted, indicate with a "C." For new applications to be implemented, identify as "A."

Task Number 6.2: Establish Applications Priorities

Process

The steps in carrying out this task are:

- Review criteria for prioritizing applications
- Establish priorities

Review Criteria for Prioritizing Applications

The following criteria can be used to help you prioritize applications:

- Initial opportunities for success
- Economic feasibility
- Technical feasibility
- Operational feasibility

Initial success is very important for the continued support and expansion of office systems in your organization. For this reason, the first applications you implement should be those that give you the best opportunities for success. Factors that can contribute to successful applications include:

- Management support
- Ease of performance
- Visibility
- Economic impact

Establish Priorities

Identify the order in which applications are to be developed and implemented. You may want to add the planned dates for implementing each application to the Applications Planning Chart developed in "Task Number 6.1: Identify Applications." This chart can be used by personnel responsible for developing applications.

Result

☐ The order in which applications should be developed and implemented.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____

- Completion date:_____

Task Number 6.3: Design Applications

Process

The steps in carrying out this task are:

- Review design considerations
- Review options
- Review new formats and/or workflows with principals
- Revise design if necessary
- Demonstrate applications
- Develop application designs

Review Design Considerations

The design of applications is one of the most important implementation planning tasks you will perform. When designing applications, keep in mind the following considerations:

- Early emphasis should be on priority applications

- A literal translation of your current system may not take full advantage of the new system's capabilities

- All features, capabilities, options, and advantages of the new system should be considered

- Consider layout of document distribution network (if applicable)

- Determine IBM 6670 applications (if applicable)

Review Options

Make sure you address all application areas. Design of applications should include:

- Text and other basic applications offered by IBM 5520
- Specialized applications such as document distribution
- Files applications
- Host applications (CICS/IMS, SFN (store and forward node), and DD)

Develop Application Designs

Applications can be grouped for development as follows:

- Stand-alone operations, basic text applications
- Files applications
- Host-attached applications
- Document distribution applications

The key reference for designing basic IBM 5520 text applications is:

- IBM 5520 Administrative System Implementation Planning SC23-0713

The key references for conversion of documents previously prepared on other word processors, i.e., mag card input, etc., are:

- IBM 5520 Administrative System Operator Guide SC23-0715
- IBM 5520 Administrative System Remote Device Operator's Guide SC23-0746

The key reference for designing IBM 5520 files applications is:

- IBM 5520 Administrative System Files Design and Stored Procedures SC23-0737

The key reference for designing IBM 5520 host-attached applications is:

- IBM 5520 Administrative System S/370 Host Attach Programmer's Guide SC23-0710

The key reference for IBM 5520 Document Distribution is:

- IBM 5520 Administrative System Document Distribution Planning Considerations and Management SC23-0716

Result

- ☐ Designs for all text, files, and document distribution/host applications to be implemented.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 6.4: Establish Cutover Plan

Process

The steps in carrying out this task are:

- Review conversion requirements
- Develop cutover plan

Review Conversion Requirements

The installation of IBM Office Systems will require a transition from the way things are done now. Whether you are converting from a manual system or from a different automated system, the requirements are generally the same. You will need to:

- Review work flow
- Consider new types of paper and forms
- Prioritize implementation of applications
- Set target dates for implementing applications
- Train and motivate end users

Three general strategies can be used for the cutover.

- Parallel operations
- Gradual cutover
- Complete cutover

Parallel operations allow you to try the new applications while maintaining your current system. This approach provides an easy fallback should problems arise with the new system. A gradual cutover allows you to implement one or two applications at a time, ensuring their success before additional applications are introduced. A complete cutover is simply a one-step switch to the new system and applications. Because parallel and gradual cutover strategies provide greater opportunities for initial success, and lessen the amount of resistance end users may exhibit, these strategies are recommended over a complete cutover.

Develop Cutover Plan

Develop a cutover plan for converting from your current system to IBM Office Systems. Be sure to address all relevant considerations. You may want to use the Applications Implementation Planner on page 6-10 to document your plans.

Result

- ☐ Detailed cutover plan.

- ☐ A smooth transition from your current system to IBM Office Systems.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

APPLICATIONS IMPLEMENTATION PLANNER

DEPARTMENT	APPLICATIONS	TESTING DATES		IMPLEMENTATION DATES		REMARKS
		PROJECTED	COMPLETED	PROJECTED	COMPLETED	

Task Number 6.5: Develop Applications Test Plan

Process

The steps in carrying out this task are:

- Review application testing considerations
- Develop test plan for initial applications
- Develop ongoing test plan

Review Application Testing Considerations

The following factors and considerations should be taken into account in developing a plan for testing applications:

- Testing of both local and host-related applications
- Testing at both local and host sites
- Cross-section testing using different audiences and environments
- Central testing and verification before overall implementation
- Testing applications in isolation
- Using a test system or your production system
- Testing for both technical feasibility and ease of use
- Testing with end users
- Testing of document distribution facilities

Develop Test Plan for Initial Applications

Develop a comprehensive plan for testing all proposed application designs, and assign testing responsibilities and due dates.

Develop Ongoing Test Plan

In addition to the plan for testing initial applications, you should develop an ongoing plan for testing new applications. A plan for testing applications might include:

- A designated test system
- A test period with production personnel
- Test data

A designated "test system" does not necessarily mean an IBM 5520 system that is used only for testing purposes. The designated system can be one of your regular production systems that is also used for testing activities. This IBM 5520 can be used to test Program Temporary Fixes (PTFs), system modifications, stored procedures, and new application designs before they are introduced to your entire production environment.

A test period with production personnel should be considered whenever new applications are introduced. This will provide a "real world" test of the application. Feedback from end users is essential for understanding faults, design errors, and operational difficulties, as well as providing opportunities for improvement. The test period will allow you to correct or improve applications before they are introduced into the production environment.

A set of test data is often useful for testing new applications. This will allow you to test an application without managing large documents and your production files.

These factors should be considered, along with those reviewed earlier for testing your initial applications, in developing an ongoing strategy for testing applications.

Result

☐ A documented plan for testing applications.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 6.6: Coordinate Text and Nontext Applications

Process

The steps in carrying out this task are:

- Review coordination considerations
- Coordinate planning

Review Coordination Considerations

Planning for text and nontext applications, such as document distribution, files, and host attach, and coordinate those requirements with plans for the text applications.

Result

☐ Effective implementation of all text and nontext applications.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Chapter 7. Develop System Plan

Introduction

A detailed plan must be developed for installing IBM Office Systems hardware and software. This chapter provides task descriptions to help you plan:

- Hardware installation
- Program product installation
- Operator profiles
- Document distribution profiles
- Printer profiles
- Diskette set-up profiles
- Stored document formats
- Document distribution environment
- Host attach environment

Task Number 7.1: Plan Hardware Installation

Process

The steps in carrying out this task are:

- Review hardware installation considerations
- Develop configuration diagram
- Develop installation plan

Review Hardware Installation Considerations

You need to plan for the actual delivery and physical installation of the equipment. Your plan for hardware installation should consider:

- Physical dimensions for accommodating delivery of equipment
  - Doorways
  - Elevators
  - Physical paths
- Weight limits for accommodating delivery of equipment
  - Elevators
  - Physical paths
- Planning for required personnel
  - Delivery personnel
  - Facilities personnel
  - Electricians
  - Union considerations
- Security arrangements
  - Nonemployees
  - Building access
- Planning for access to installation areas
  - Building access outside regular business hours
  - Security access requirements
- Coordination between Customer Set Up (CSU) and IBM Customer Service Division Customer Engineer (CE) hardware installation activities

Develop Configuration Diagram

Develop a diagram that shows where all your office systems equipment is to be installed. Identify:

- Type of equipment
- Model numbers
- Logical addresses

If floor plans have already been developed for physical planning, add this information to your plans.

Develop Installation Plan

Develop a comprehensive plan that includes:

- Physical path for delivery of the equipment
- Personnel requirements
- Security arrangements
- Access requirements
- Plans for coordination between CSU and IBM-installed hardware
- Configuration diagram

Result

☐ Documented plan for delivery and installation of IBM Office Systems hardware.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 7.2: Plan Operator Profiles

Process

The steps in carrying out this task are:

- Review considerations for security and lead operators
- Review considerations for backup operators
- Review considerations for all other operators
- Identify operator types needed
- Plan profiles and complete operator profile worksheets

Review Considerations for Security and Lead Operators

Each operator who works on the IBM 5520 system must be identified to the system by an operator profile. This profile determines the functions each operator is allowed to perform. The operator profile defining the functions that can be accessed by security operators is different from all other profiles.

Review Considerations for Backup Operator

It is a good idea to establish a backup operator profile so you can access needed security functions when the normal security operator is unavailable.

You can give other operators access to security functions by changing operator profile options through the CHP command in special set-ups.

Review Considerations for all Other Operators

Factors to be considered when defining operator profiles other than security include:

- Whether operators will work in a centralized or decentralized environment
- Whether or not operators will be sharing document libraries
- What applications will be assigned to the operator
- Printing procedures to be used
- Archiving procedures to be used
- Security requirements
- Document distribition network management

The control and management of work flow also affects how operator profiles should be defined. A function that requires two operators to work closely together, for example, may require that the two have access to each other's document library documents.

Identify Operator Types Needed

The tasks each operator performs will largely determine the IBM 5520 functions to which that operator should have access. These tasks are most easily identified by analyzing job descriptions. Each of the following job titles will most likely require a different operator profile:

- Security operator capability
- Backup security operator
- Lead operator
- Entry revision operator

Plan Profiles and Complete Operator Profile Worksheets

Plan a profile for each anticipated user that addresses all the issues discussed in this task description.

- Consider creating a unique profile for ownership of shell documents, files, file descriptions, merge control documents, stored procedures, documentation, and other stored document formats which are shared by all operators
- Review IBM publications for authority of each operator level
- Establish naming conventions for operator names which are unique to documents, formats, communications devices, etc., naming conventions

See IBM 5520 Installation Manual - Implementation Planning SC23-0713, Section 2 for worksheets and examples.

Result

☐ A set of completed Operator Profile Worksheets that provide appropriate responses for all anticipated operators.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 7.3: Plan Document Distribution and Host Support Environment
Number 7.3: Plan Document Distribution and Host Support Environment

Process

The steps in carrying out this task are:

- Review planning considerations
- Review requirements for IBM 5520 document distribution
- Review requirements for host support programs
- Plan installations

Review Planning Considerations

All required document distribution and host support environment program products must be installed. Identify the program products currently installed on your host system and those that are on order. Then plan the installation of all program products on order.

Result

- ☐ A list of program products required.

- ☐ A plan for installing and implementing required program products.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____

- Completion date: _____

Task Number 7.4: Specify Document Distribution Profiles

Process

The steps in carrying out this task are:

- Plan network layout
- Plan line configuration at each node
- Plan remote device profiles
- Plan session profiles
- Plan lists and routing
- Plan local addresses
- Plan collection lists

Plan Network Layout

Plan physical layout of network in order to optimize line usage and balance line loading. Determine type of network, i.e. peer to peer, Store and forward, etc. Plan connection type-LDC, leased or switched lines.

Plan Node Profiles

Plan the nodes with which each node will communicate. Specify trigger parameters and required routing information.

Plan Line Configuration at each Node

Determine lines required at each node. Specify the IBM 5520 line profiles and parameters to support these lines. Insure security passwords and secondary addresses are properly assigned.

Plan Remote Device Profiles

Specify the remote devices with which each node is to communicate (adjacent versus non-adjacent). Specify secondary addresses and security passwords.

Plan Session Profiles

Plan sessions required for SDLC remote devices and host. Insure the logical unit passwords are coordinated in the send and receive session pairs.

Plan Lists and Routing

Plan the required distribution, collection, node routing, and node queueing lists.

Plan Local Addresses

Specify local address required for distribution. Insure they are known to all who will be distributing to them.

Plan Collection Lists

Specify local addresses required for distribution on collections lists which are identified with the owning operator and backup operators for cross referencing and backup coverage.

Key References for this Activity are:

- IBM 5520 Installation Manual - Implementation Planning SC23-0713
- IBM 5520 Document Distribution Planning Considerations and Management SC23-0716

Result

☐ A complete set of document distribution profiles and procedures.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 7.5: Specify Printer Profiles

Process

The steps in carrying out this task are:

- Plan printer types
- Plan printer line assignments and locations
- Plan printer set-up profiles

Plan Printer Types

Determine the printer types required of each location. Take into consideration the quantity and quality of printing to be done.

Plan Printer Line Assignments and Locations

Plan printer placement to make best use of available printer lines. Take into consideration loading on multi-line machines. Place printers as close as possible to users. Specify device operators for printers in the printer profile.

Plan Printer Set-up Profiles

Specify set-up profiles for all common print jobs. Follow a naming convention to enable proper set-up to be determined easily.

Key Reference for this Section is

IBM 5520 Installation Manual - Implementation Planning SC23-0713.

Result

☐ A complete set of printer profiles and printer set-up profiles.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 7.6: Specify Diskette Set-up Profiles

Process

The steps in carrying out this task are:

- Review system supplied set-ups
- Create any additional set-ups required

Review the System Supplied Set-up

Determine if system supplied set-ups meet all requirements of your installation.

Create any Additional Required

Create and name any additional set-ups required.

Result

☐ A complete set of diskette set-up procedures.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Chapter 8. Develop Standards and Procedures and Prepare Manuals

Introduction

Standards and procedures need to be developed for a wide range of topics. This chapter provides task descriptions that will help you develop standards and procedures for:

- Security
- Naming conventions
- Document formats
- Printing
- Document retention
- Archiving
- Backup/recovery
- Housekeeping
- Communications
- Problem determination and tracking
- Software maintenance

It is important to understand the distinction between developing standards for each of these areas, and developing specific procedures. Each area requires a set of standards--that is, a set of rules, guidelines, or policies that are established as models or examples for performing specific routines or producing specific documents. Procedures are the specific tasks or steps that are performed to produce a result or document that meets the established standards.

An overall strategy must be developed for each topic area. This strategy is a plan for developing the detailed standards and procedures, and might include such things as corporate goals, companywide standards, kinds of standards needed, and who is responsible for doing the actual work to develop the standards and procedures.

The development of actual standards and procedures involves establishing a formal description of performance quality requirements and detailed task steps.

In assigning tasks for development of standards and procedures, consider the distinction between those assigned the overall responsibility for a task and those who will actually be doing most of the work. Those assigned overall responsibility should concern themselves with developing the overall strategy for the assigned topic area, while the development of specific standards and procedures can be delegated to others.

Standards and procedures must be documented to be effective. This chapter also provides a task description to help you develop procedures manuals.

Task Number 8.1: Establish Security Standards and Procedures

Process

The steps in carrying out this task are:

- Review Appendix B
- Review IBM 5520 security considerations
- Review document distribution and host security considerations
- Develop standards and procedures

Review Appendix B

Text, files, and document distribution security considerations are discussed in Appendix B. Read this appendix before you begin developing standards and procedures for office systems security.

Review IBM 5520 Security Considerations

IBM 5520 security can be defined as the protection of data from accidental or intentional disclosure to unauthorized persons and from unauthorized modification. Deliberate unauthorized access is a concern and must be prevented. However, the primary security threat is the unintentional modification or deletion of data by authorized users.

In order to protect IBM 5520 data, an effective security scheme must control both authorized and unauthorized access to various system levels. These levels of access include:

- Device access
- System access
- Document access
- System service access
- Archiving access

You should limit each operator's access to the various levels according to the operator's need for access. By restricting access, you decrease the possibility of intentional or accidental modification or deletion of data.

Most access to IBM 5520 data and system services can be controlled by the definition of operator profiles. You should address security considerations during your planning of these profiles.

The key references for IBM 5520 security considerations are:

- IBM 5520 Planning Considerations and Management SC23-0716, Chapter 1.

- "Appendix B. Security" in this Guide.

Review Host Security Considerations

Host security can also be defined as the protection of data from accidental or intentional disclosure to unauthorized persons and from unauthorized modification.

In order to protect host data, an effective security scheme must control both authorized and unauthorized access to various system levels. These levels of access include:

- Device access
- System access
- Document access

By restricting access to host functions and data, you decrease the possibility of intentional or accidental modification or deletion of data. Be sure to address security considerations when you plan IBM 5520 profiles.

In addition to the standard host security features, a program product called Resource Access Control Facility (RACF) is available for host users running in an MVS environment. This product can provide additional controls on access to host functions and data.

The key references for host security considerations are:

- "Appendix B. Security" in this Guide

Develop Standards and Procedures

A number of areas affect the security of IBM 5520 and host systems. To implement an effective security policy, your security standards and procedures must address all these areas.

- IBM 5520 considerations:
  - Operator profiles
  - Operator, node and local address passwords
  - Operator names
  - Document access code
  - Encryption (optional)
- Host considerations:
  - Host user profiles
  - Controller IDs (subsystem IDs)
  - Operator numbers (user IDs)
  - Requestor names (user names)
  - Requestor IDs
  - Passwords
  - Access codes

In addition to the specific references listed for IBM 5520 and host, the following references may be useful for developing a comprehensive security plan:

- The Considerations of Physical Security in a Computer Environment, G520-2700
- The Considerations of Data Security in a Computer Environment, G520-2169
- Staying in Charge, G505-0058

Result

- ☐ Documented standards and procedures that address all appropriate security considerations.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 8.2: Establish Naming Standards and Procedures

Process

The steps in carrying out this task are:

- Establish IBM 5520 naming standards and procedures
- Establish host naming standards and procedures
- Establish naming standards and procedures for Document Distibution
- Establish directories

Establish IBM 5520 Naming Standards and Procedures

Standards and procedures must be established for entering data for the following IBM 5520 fields for document profile:

- Document name (local name)
- Comments
- Operator number
- Password

Naming standards and procedures will help improve both security and effectiveness of the system. Operators will be able to access documents without referring to a document list if document names are logical and easy to remember.

Conventions for naming documents vary from composites of document information to numbering systems. Whatever standards you establish, however, must be used by all operators in your organization.

Key references for establishing IBM 5520 naming standards and procedures are:

- "Appendix C. Naming Standards" in this Guide

Establish Host Naming Standards and Procedures

If IBM 5520(s) are IBM S/370 host attached, standards and procedures must be established for entering data for the following fields:

- Requestor
- Requestor ID and password
- Copy request ID
- Document file name
- Recipient
- Author
- Search terms
- Document class
- Request ID
- Subject
- Date

Host naming standards and procedures will also help improve the security and effectiveness of the system. Standards for entering and using IDs and passwords will make it easier for authorized users to access the system. Operators will be able to effectively access documents without a document list if the standards for naming documents, document classes, and subjects make those terms logical and easy to remember. A variety of conventions may be used. Whatever standards you establish, however, must be used by all operators in your organization, whether local or remote from your central site.

Key reference for establishing host naming standards and procedures is:

- "Appendix C. Naming Standards" in this Guide.

Establish Naming Standards and Procedures for Document Distribution Fields

Other fields that need to be standardized include:

- Local addresses, collection lists and distribution lists
- Node names
- Logical Unit (LU) numbers
- Host supervisor ID
- Host deferred operator ID
- Data set numbers
- Program numbers
- Panel numbers
- Session names

Establish Directories

A considerable amount of communication must take place in a distributed environment. If you are installing a number of IBM 5520s and host program products, you will need to establish directories that allow users to communicate with the various subsystems.

These directories should include the local addresses (IDs) of all IBM 5520s with an indication of the departments or persons assigned to those processors. The directories should also include operator names. You may want to consider adding this information to existing company directories.

Result

- ☐ Documented standards and procedures for all naming requirements.

- ☐ Directories, if appropriate.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 8.3: Establish Document Format Standards and Procedures

Process

The steps in carrying out this task are:

- Establish standard formats
- Document format standards and procedures

Establish Standard Formats

Development of standard formats will greatly increase the productivity of your systems. For each specific application you develop, you should develop standards for the following format characteristics:

- Page layout
- Characters per line
- Lines per page
- Stationery and forms used
- Type style and pitch preference
- Confidentiality requirements
- Line spacing
- Headers
- Footers
- Pagination
- Tabs
- Indents (blocked or indented paragraphs)
- Any other format considerations unique to your organization

You may be developing "patterns" of frequently used documents. If so, you should standardize the formats for these documents.

Document Format Standards and Procedures

Standard formats and the procedures for preparing document formats will determine the appearance of your final documents. Document format standards and procedures and include them in your procedures manuals.

Result

☐ Documented standards and procedures for all frequently used documents.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____

- Completion date:_____

Task Number 8.4: Establish Printing Standards and Procedures

Process

The steps in carrying out this tasks are:

- Review general printing considerations
- Review IBM 6670 considerations
- Developing printing standards and procedures
- Document standards and procedures

Review General Printing Considerations

Printing of documents is a regular activity in the office systems environment. Organizing your work flow and standardizing the way you produce documents will help you achieve maximum results from the system.

Printing standards and procedures should be developed that address the particular characteristics of your system, the printers you are installing, the physical organization of your office, and the nature of your work flow.

Review IBM 6670 Considerations

If you are installing IBM 6670 Information Distributors in addition to other printers, you will need to develop standards and procedures for that equipment.

For example, you will have to establish standards for using the IBM 6670 Operator Control Language (OCL). You may wish to consider using the prefix file support, which masks the OCL from your general text operators, or using stored formats that include OCL. Stored formats that include OCL offer greater flexibility, but require that your operators have a greater understanding of the OCL.

You will have to make these kinds of determinations, and establish specific standards and procedures for the operators who will be using the IBM 6670.

Developing Printing Standards and Procedures

The standards and procedures you develop for printing documents should include the following specific tasks:

- Starting or stopping print queues
- Changing jobs in queues
- Displaying jobs in a queue
- Cancelling jobs from a queue
- Determining jobs currently active on a printer

Your standards and procedures should also address responsibilities and authorizations for performing these tasks.

Document Standards and Procedures

After you have established printing standards and procedures, you should document them for inclusion in your procedures manuals.

Result

- ☐ Documented standards and procedures for printing documents.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 8.5: Establish Document Retention Standards and Procedures

Process

The steps in carrying out this task are:

- Establish retention standards
- Establish document retention and deletion procedures
- Document retention standards and procedures

Establish Retention Standards

Available storage can be maximized by deleting documents that have lost their usefulness. You should regularly delete:

- Documents stored in the Document Library that are no longer needed
- Documents archieved on diskettes that are no longer needed

To maximize storage space and prevent premature deletion of documents that should be retained, you should establish standards for the retention of documents.

Establish Document Retention and Deletion Procedures

Once retention standards are established, procedures should be developed to ensure that the standards are enforced. The procedures should include:

- Authorization for operators to archive documents
- Operator procedures for archiving stored documents and deleting stored documents
- Procedures for deleting documents archived on diskettes

If your organization has any existing retention standards, you should incorporate them into the retention standards you develop for office systems. Be sure to coordinate retention standards with your plans for archiving procedures. This task is discussed under "Task Number 8.7: Establish Archiving Standards and Procedures" in this chapter.

Document Retention Standards and Procedures

After you have established retention standards and procedures, you should document them for inclusion in your procedures manuals.

Result

- ☐ Documented retention standards and procedures for all types of documents.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date:_____
- Completion date:_____

Task Number 8.6: Establish Archiving Standards and Procedures

Process

The steps in carrying out this task are:

- Review the function of archiving
- Develop archiving standards and procedures
- Document standards and procedures

Review the Function of Archiving

Archiving is the transfer of documents from the IBM 5520 document library to diskette. The diskettes serve as an external library for storing documents that no longer require immediate access.

Because diskettes can be stored separate from the IBM 5520, documents stored on diskettes are not affected by system problems. For this reason, archiving on diskettes can be used as a backup measure. Archiving also serves to free up space in your document library.

Develop Archiving Standards and Procedures

You should develop standards and procedures for all archiving activities. These standards and procedures should include:

- Authorizing operators to do archiving
- Processing archive
- Listing requests in a queue
- Deleting requests from a queue

Document retention standards should also be incorporated into your standards and procedures for archiving. This topic is discussed under "Task number 8.5: Establish Document Retention Standards and Procedures" in this chapter.

Document Standards and Procedures

After you have established archiving standards and procedures, you should document them for inclusion in your procedures manuals.

Result

- ☐ Documented standards and procedures for archiving documents.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 8.7: Establish Backup/Recovery Standards and Procedures

Process

The steps in carrying out this task are:

- Review backup/recovery requirements
- Identify distributed information to be saved
- Identify facilities for saving distributed information
- Develop distributed information backup/recovery procedures
- Identify host information to be saved
- Identify facilities for saving host information
- Develop host information backup/recovery procedures

Review Backup/Recovery Requirements

Both distributed and host information should be backed up in order to prevent serious data loss and to save considerable rekeying should the need for total systems recovery arise. Because backup and recovery is critical to the success of office systems, standards and procedures must be established to organize and standardize this activity.

Identify Distributed Information to be Saved

Prepare for the possibility of a IBM 5520 failure by saving the information needed to recover the distributed system. This information includes:

- Document library documents
- System generation information
- Profile definitions

Identify Facilities for Saving Distributed Information

The two methods of saving distributed information are:

- Use IBM 5520 archive function to copy the information onto diskettes
- Use host DD to store the information at the host

Develop Distributed Information Backup/Recovery Procedures

Standards and procedures must be developed to ensure that distributed information is regularly backed up. Considerations should include:

- What information is to be saved
- How often information is to be saved
- What method(s) will be used to save information
- Who is to save the information
- Where the information will be stored for safekeeping

Key references for developing distributed information backup and recovery standards and procedures are:

- "Appendix D. Backup and Recovery" in this Guide

Identify Host Information to be Saved

You should prepare for host information recovery contingencies by saving the information needed to recover the host system. This information includes:

- Host data sets
- IMS and CICS logs

Identify Facilities for Saving Host Information

Regular data processing methods are used to save host information. These methods include:

- Save system information on tape using the dump/restore procedure
- Save IMS and CICS logs

You can recover the host system by merging IMS and CICS log tapes with the system information stored on tape. This method will restore the system to where it was when the logs were last run.

Develop Host Information Backup/Recovery Procedures

Standards and procedures must be developed to ensure that host information is regularly backed up. Considerations should include:

- What information is to be saved
- How often information is to be saved
- What method(s) will be used to save information
- Who is to save the information
- Where the information will be stored for safekeeping

The reference for developing host information backup and recovery standards and procedures are:

- Appendix D, "Backup and Recovery" in this Guide

Result

- ☐ Documented standards and procedures for backup and recovery of IBM 5520 distributed information.
- ☐ Documented standards and procedures for backup and recovery of host information.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 8.8: Establish Housekeeping Standards and Procedures

Process

The steps in carrying out this task are:

- Review housekeeping requirements
- Establish daily housekeeping standards and procedures for Lead Operators
- Establish periodic housekeeping standards and procedures for Lead Operators
- Establish daily housekeeping standards and procedures for all other operators
- Document standards and procedures

Review Housekeeping Requirements

A number of tasks must be performed for the daily operation of office systems. These tasks include turning on the equipment, reviewing messages, and controlling operators' access to the system data and functions.

Lead Operators perform the more important management and control operations. Other tasks are performed by all operators. It is important to establish standards and procedures for these activities to ensure effective operation of the systems.

Establish Daily Housekeeping Standards and Procedures for Lead Operators

Lead Operators may need to perform certain tasks every day. Depending on your oganization and whether or not the system is shut down during any part of the day, tasks may include:

- Power on and IPL the IBM 5525 System Unit
- Power on terminals and printers
- Review messages
- Perform archiving, security, and backup functions
- Power off terminals and printers
- Power down IBM 5520 System Unit when activity ends

Document Distribution/Host tasks may include:

- Perform the host start-up procedure
- Follow established communications procedures for activating sessions, lines and devices

Daily procedures for Lead Operators may include some of the above tasks as well as others specific to your organization. Establish daily house-keeping standards and procedures for Lead Operators in your organization.

Establish Periodic Housekeeping Standards and Procedures for Lead Operators

Periodic Housekeeping Standards and Procedures for Lead Operators

In addition to daily housekeeping tasks, several periodic tasks may be performed by Lead Operators. Tasks may include:

- Print management
- Controlling other operators' access to the IBM 5520 system
- Managing security procedures
- Changing IBM 5520 system control information

Host tasks may include controlling other operators' access to host functions.

If you have IBM 5520(s) attached to a host IBM S/370, periodic tasks that must be handled at the host are reorganization of the host text library and updating of the host user profile.

Periodic procedures for Lead Operators may include some of the above tasks as well as others specific to your organization. Establish standards and procedures for periodic housekeeping tasks to be performed by Lead Operators in your organization.

Establish Daily Housekeeping Standards and Procedures for All Other Operators

Entry Revision operators will need to perform certain daily housekeeping tasks. These tasks may include:

- Sign on
- Review messages
- Run document list and identify documents no longer needed
- Archive documents as authorized
- Perform ongoing text processing, security, and backup functions as authorized

Daily procedures for all operators may include some of the above tasks as well as others specific to your organization. Establish daily housekeeping standards and procedures for all operators in your organization.

Result

- ☐ Documented standards and procedures for all daily and periodic housekeeping tasks.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 8.9: Establish Communication Standards and Procedures

Process

The steps in carrying out this task are:

- Review communication considerations
- Develop communication standards and procedures
- Document standards and procedures

Review Communication Considerations

A distributed processing operation relies on successful communications between the distributed system and the host system. Through this communication link, distributed users can take advantage of the greater computing and storage capabilities of the host processor. Communication between the IBM 5520 and host systems is achieved during sessions, which are the periods of time during which the systems can communicate.

Sessions must be defined to multiple host software components. The host programs, VTAM or TCAM, NCP, and controller programs must all define their view of the session in a consistent fashion.

Standards and procedures must be established that organize use of the systems during sessions. Factors to consider when developing communication standards and procedures include:

- Number and duration of planned sessions
- Number of concurrent interactive sessions available for host attach
- Activation of logical units for host
- Availability of host
- Impact of host system on local operations
- Impact of local operations on host system
- Line utilization

Develop Communication Standards and Procedures

Specific standards and procedures must be developed so that operators can recognize when host communication is available and perform host communication activities. Communication standards and procedures should include:

- Regular times when sessions are running
- Number and duration of sessions
- Recognizing the status of sessions
- Host start up and shut down
- Activating logical units
- Running deferred sessions
- Running interactive sessions
- Session definition and documentation

Some installations have their distributed and host systems in constant communication, while others have selected availabilities during slack periods or certain times of the day. To develop standards and procedures for communications, you will have to review the availability of the host system for distributed processing tasks.

Key reference for developing communication standards and procedures are:

- IBM 5520 Administrative System S/370 Host Attach Programmers Guide SC23-0710

Document Standards and Procedures

After you have established communication standards and procedures, you should document them for inclusion in your procedures manuals.

Result

- ☐ Documented standards and procedures for communication between IBM 5520 and host systems.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 8.10: Establish Problem Determination and Tracking Standards and Procedures

Process

The steps in carrying out this task are:

- Review problem determination and tracking considerations
- Review local problems
- Review system problems
- Review document distribution and host-related problems
- Identify problem reporting tools
- Establish problem tracking organization
- Develop problem determination and tracking standards and procedures
- Document standards and procedures

Review Problem Determination and Tracking Considerations

Problem determination and tracking consists of the procedures followed to document system malfunctions, determine the sources of problems, and correct the problems. Problem determination and tracking standards and procedures should address local, system, and host-related problems, as well as the problem management responsibilities of keyboard operators, Lead Operators, and problem management personnel.

Review Local Problems

Local problems are those involving a single operator, display station, or printer. The problems are local in the sense that they originate at the terminal and do not affect other terminals. Local problems may include:

- Incorrect operation or "how to" problems
- Display station malfunctions
- Printer malfunctions
- Display station error messages
- Cabling problems

Review System Problems

System problems are those originating at the IBM 5520 System Unit. These problems may affect some or all of the display stations associated with that system. System problems may include:

- IBM 5520 System Unit malfunctions
- System/diagnostic indicators on the IBM 5525 operator panel
- Licensed Program Product software problems

Review Host-Related Problems

Host-related problems are those originating at the host or caused by a malfunction of the equipment that connects the host and IBM 5520 systems. Host-related problems may include:

- Host error messages
- Problems with modems, communication lines, or communication controllers or adapters
- Host software problems
- Document Distribution host support environment software problems

Identify Problem Reporting Tools

When a fault occurs, it is usually accompanied by a deterioration in system performance or a system indication. Recording symptoms that appear at the time of the fault will aid in determining and correcting the problem. Problem reporting tools that should be a regular part of your problem determination and tracking standards and procedures include:

- End user's description of the problem, including symptoms, time of day, situation, and other relevant data
- Printout of error messages
- IMS and CICS session logs
- Authorized Program Analysis Reports (APAR)

Establish Problem Tracking Organization

Problem determination and tracking is a task that can involve several people at several different levels. At the lowest level, operators can take the necessary actions to correct simple local problems involving text processing error messages. At a higher level, you may have to complete an APAR report and contact IBM for a solution to a complex software problem.

The problem tracking organization you establish should allow problems to be handled by the lowest level of support required. Be sure to address the roles of the following personnel involved in problem determination and tracking:

- End users
- Entry Revision Operators
- Lead Operators
- Help Desk
- Data processing personnel responsible for problem management
- IBM support structure

For further discussion of the Help Desk and the IBM support structure, see Appendix E, "Help Desk" and Appendix F, "IBM Support Structure" in this Guide. A self-study course, An Introduction to the IBM Support Center, SS061, is also available.

Develop Problem Determination and Tracking Standards and Procedures

The detailed standards and procedures you develop for problem determination and tracking should include:

- Reporting procedures
- Reporting forms
- Problem determination responsibilities
- Problem tracking organization
- Help Desk procedures
- Necessary reference documentation

The key references for developing problem determination and tracking standards and procedures are:

- "Appendix E. Help Desk" in this Guide
- "Appendix F. IBM Support Structure" in this Guide

A number of other publications contain general problem determination information and procedures. See IBM 5520 Messages and Recovery Aids SC23-0733 for a guide to problem determination.

Document Standards and Procedures

After you have established problem determination and tracking standards and procedures you should document them for inclusion in your procedures manual.

Result

- ☐ Documented standards and procedures for problem determination and tracking.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 8.11: Establish Software Maintenance Standards and Procedures

Process

In this section, maintenance applies to PTFs and/or patches supplied by IBM.

The steps in carrying out this task are:

- Review software maintenance requirements
- Develop maintenance strategy
- Develop maintenance application strategy
- Document standards and procedures

Review Software Maintenance Considerations

IBM Office Systems are supported by program products that require regular and periodic maintenance and updating. Standards and procedures should be established to ensure that this maintenance is applied as required.

Software maintenance standards and procedures should address the following considerations:

- Regular maintenance
- What IBM-supplied maintenance should be applied
- How to apply the maintenance
- How to control software change updates

Develop Maintenance Strategy

IBM develops Program Temporary Fixes (PTF) to correct problems experienced in the field. Your organization may receive PTF packages that address software problems experienced by other users. You need to develop a strategy for determining when IBM-supplied maintenance should be applied.

Your maintenance strategy should also address other maintenance requirements, including:

- Meeting with key personnel to schedule routine maintenance activities
- Procedures for handling emergency maintenance problems
- Procedures for reporting problems
- Establishing communication with appropriate IBM representatives

Develop Maintenance Test Strategy

Although not required, you may want to use one IBM 5520 system to test maintenance before the maintenance is applied to all IBM 5520s. After the maintenance is checked out on the test system, you can then apply it to all other IBM 5520s in your network.

Develop Maintenance Application Strategy

Distributed software maintenance is applied locally by diskette. Your standards and procedures should include instructions on how the maintenance should be applied.

Develop Change Control Strategy

Software maintenance may involve changes in operating procedures and system performance. Distributed software maintenance standards and procedures should address the need for change control.

Change control standards and procedures might include the following:

- Plan the change
- Receive required approvals for implementing the change
- Announce the proposed change to operators in advance
- Encourage operators to contact Help Desk if there are any problems
- Plan a fallback in the event the change is not effective

Document Standards and Procedures

After you have established standards and procedures that address all distributed software maintenance considerations, you should document them for inclusion in your procedures manuals.

Result

☐ Documented standards and procedures for software maintenance.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 8.12: Prepare Procedures Manuals

Process

The steps in carrying out this task are:

- Review benefits of effective manuals
- Establish strategy for manuals
- Identify contents and prepare manuals

Review Benefits of Effective Manuals

The development of standards and procedures can provide a smooth transition from your current system to IBM Office Systems. However, standards and procedures must be learned and used if they are to be effective. An essential part of any plan for training end users to use the standards and procedures that have been established is the preparation of procedures manuals.

Effective procedures manuals should:

- Serve as a developmental training tool for teaching end users the system and text procedures specific to their area
- Serve as a reference guide for applications procedures that are complex or infrequently used
- Eliminate misunderstandings among Lead Operators, entry revision operators, and other document originators
- Clearly define work flow and priorities
- Be available as a supplemental training tool for new end users

Establish Strategy for Manuals

Your office systems procedures can be packaged any way you consider appropriate. One way of packaging the procedures is to create separate manuals for each office systems function in your organization, such as:

- Text Administrator
- Lead Operator
- Entry Revision Operator
- Principal/Originator
- Help Desk

A second option is creating a general manual for all the procedures that are the same throughout your organization, and providing supplements for the procedures that differ from one department to another.

The general manual would contain procedures that are the same throughout your organization, such as security, backup and recovery, communications procedures, and naming standards. Text Administrator, Lead Operator, and Help Desk procedures may also be the same throughout your organization.

The department supplements would contain procedures that differ by department, such as printing, archiving, housekeeping, document retention standards, and text applications specific to a department. These departmental procedures should be directed to specific audiences, for example, entry revision operators or principals and originators.

Evaluate your working environment and select a packaging strategy that best suits your needs. In selecting a packaging strategy, considerations should include:

- Number of employees serving in each office systems function
- Ease of updating and distributing manuals
- Need to restrict information
- Need to access information
- Size of manuals
- Degree of overlap between departments

Identify Contents and Prepare Procedures Manuals

If you have completed the preceeding tasks in this chapter you have established standards and procedures for several specific areas, such as security, backup and recovery, communications, and so on. Your task now is to incorporate these procedures into the procedures manuals you have planned to support your system.

One of the options for packaging the procedures is creating separate manuals for each office systems function in your organization. If you choose that strategy, you may want to include the following suggested contents:

Text Administrator manual:

It is not necessary to document tasks Text Administrators are responsible for during implementation planning. However, all ongoing activities should be included in procedures manuals, including:

- Publications updating and distribution procedures
- Security procedures
- Backup/recovery procedures
- Communication procedures
- Problem determination and tracking procedures
- Application evaluation and development procedures
- Procedures for defining specific task steps and updating manuals
- Procedures specific to your organization

Help Desk manual:

- End user assistance
- Troubleshooting
- Interface to data processing problem management and network management functions
- Interface to IBM support structure

All procedures established to provide these services should be included in the Help Desk manual.

Lead Operator, entry revision operator, and principal or document originator manuals:

For suggested contents for Lead Operator, entry revision operator, and principal/originator manuals, as well as detailed information on preparing procedures manuals, refer to:

- IBM 5520 Installation Manaul SC23-0713
- IBM 5520 Operator's Guide SC23-0715

Result

- ☐ Procedures manuals that address all appropriate office systems standards and procedures.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss with your Project Manager.

- Start date: _____
- Completion date: _____

Chapter 9. Perform Physical Installation

Introduction

Physical installation of the hardware should take place when all other implementation planning tasks are reaching completion so that the systems and applications can be implemented as soon as the equipment is in place.

This chapter provides task descriptions that will help you:

- Confirm preparation of the physical environment
- Schedule delivery
- Perform physical installation

The task descriptions in this chapter deal with hardware installation only. Software installation is discussed in Chapter 10.

Task Number 9.1: Confirm Preparation of the Physical Environment

Process

The steps in carrying out this task are:

- Review Physical planning requirements
- Confirm that physical planning requirements are met

Review Physical Planning Requirements

Physical planning requirements are discussed in Chapter 2. These requirements include:

- Floor plans
- Office alterations to accommodate equipment placement
- Office alterations to meet electrical requirements
- Air conditioning, lighting, and noise-control requirements
- Furniture
- Telephones
- Installation and testing of cables and electrical outlets

Confirm that Physical Planning Requirements are Met

Confirm that all physical planning requirements have been met before you schedule delivery of the equipment. You should also confirm completion of plans for installing the hardware. This topic is discussed under "Task number 7.1: Plan hardware installation" in Chapter 7.

Result

- ☐ Confirmation that all physical planning requirements have been met.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start Date: _____
- Completion Date: _____

Task Number 9.2: Schedule Delivery

Process

The steps in carrying out this task are:

- Verify personnel arrangements
- Verify security arrangements
- Verify access arrangements
- Schedule delivery

Verify Personnel Arrangements

A plan for the physical installation of IBM Office Systems hardware was developed under "Task number 7.1: Plan hardware installation" in Chapter 7. Arrangements should have been made for all personnel that must be available for delivery of the hardware. Personnel required include:

- Delivery personnel
- Facilities personnel
- Electricians

Verify that arrangements have been made for all required personnel. Be sure to consider any union requirements that may affect delivery.

Verify Security Arrangements

Depending on your organization's security policies, you may have had to make security arrangements for nonemployees involved in delivery of the hardware or access to secured areas of your facility where equipment is to be installed. Verify that these arrangements have been made.

Verify Access Arrangements

Delivery personnel must have ready access to all areas where equipment is to be installed. Verify arrangements for the physical path the equipment will take during delivery, access to your facilities outside of regular business hours, or access to secure areas, as required.

Schedule Delivery

After you have verified personnel, security, and access arrangements, set the delivery date and confirm it with IBM.

Result

- ☐ Efficient delivery of IBM Office Systems hardware.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 9.3: Perform Physical Installation

Process

The steps in carrying out this task:

- Inventory hardware
- Install hardware
- Confirm installation

Inventory Hardware

You should make a complete inventory of the hardware when it is delivered. Check the delivery to make sure all hardware ordered has arrived, including:

- IBM 5525 system unit(s)
- Display stations
- Printers
- Optional equipment, such as magentic card units or OEM sheet feeders
- Modems and telephones (if applicable)

If your inventory reveals missing IBM hardware, contact your IBM representative.

Install Hardware

You will need to coordinate activities of the different personnel involved in installation of the hardware, including:

- Facilities personnel
- Electricians
- Systems programmers
- IBM personnel

Manage installation of the hardware, making sure that all equipment is installed according to the floor plans you have developed. You may have to take union considerations into account in managing installation activities. Be sure to coordinate installation of Customer Set Up (CSU) hardware with the installation of hardware set up by the Customer Engineer from IBM.

Confirm Installation

After all hardware has been installed, run checks to make sure the hardware is functional.

Result

- ☐ Successful installation of all office systems hardware.

Schedule Planning

Before you being this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Chapter 10. Implement Systems and Applications

Introduction

Implementation of systems and applications includes installation of appropriate software and implementation of the applications developed for the office system. The tasks in this chapter can be performed only after detailed systems and applications plans have been finalized and physical installation of the hardware is complete.

Standards and procedures should be developed and end users should have received preliminary hands-on training prior to implementing the applications plan so that the system can be used immediately.

This chapter provides task descriptions that will help you:

- Generate the text environment
- Generate files environment
- Install document distribution and the host support environment
- Install applications on host
- Install communications network
- Complete hands-on training
- Implement your applications plan

Task Number 10.1: Generate Text Environment

Process

The steps in carrying out this task are:

- Define operator profiles
- Define stored document formats
- Define lines for printers
- Define printers and setups

Define Operator Profiles

Operator device responsibilities are assigned, passwords defined and operator authority is assigned.

Operator profiles are then created.

Note - only one operator who is signed on (the first Lead Operator to sign on) will receive system messages. Care must be taken to insure system messages are routed to the proper operator.

Define Document Formats

Stored formats should be created for the various document types to be entered. Appropriate names should be chosen to tie the formats to the respective applications.

Define Lines for Printers

Decide on locations where printers are required. Allocate sufficient lines for the print load to be handled. Settle on routing.

Define Printers and Setups

Allocate printer assignments according to quality of print, quantity to print, and proximity to using locations.

Define setups required for jobs to be printed.

Result

- ☐ A complete set of operator profiles and document profiles.
- ☐ Correct assignment of printer lines and printer set-ups for required print jobs.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 10.2: Generate Files Environment

Process

Define profiles for all operators. Assign authority as required by responsibility. See IBM 5520 Installation Manual Implementation Planning SC23-0713.

The steps in carrying out this task are:

- Define operator profiles
- Define the file description (FD)
- Define (create) the merge control document (MCD)
- Define stored procedures

Define Operator Profiles

Operator device responsibilities are assigned, passwords defined and operator authority is assigned.

Operator profiles are then created.

Note - only one operator who is signed on (the first Lead Operator to sign on) will receive system messages. Care must be taken to insure system messages are routed to the proper operator.

Define the File Description (FD)

From information on Files applications determine the layout required for the various files. Enter and appropriately name the FD's.

Define (Create) the Merge Control Documents (MCD's)

Enter the skeleton documents for common form letters, etc. required.

Define Stored Procedures

Define and enter the stored procedure your installation wants to use for file processing. Name them appropriately.

The Key Reference for File Implementation is

IBM 5520 Installation Manual-Files Design and Stored Procedures SC23-0737.

Result

- ☐ Definition of all planned operator profiles and sessions.

As soon as this task is completed, consideration should be given to immediate backup of the data. See "Task number 10.5: Document system parameters" in this chapter.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 10.3: Install Document Distribution and Host Support Environment
Number 10.3: Install Document Distribution and Host Support Environment

Process

The steps in carrying out this task are:

- Verify host software requirements
- Verify existing software
- Install required software

Verify Document Distribution and Host Software Requirements

Review your document distribution and host support environment plan. Verify that your plan includes all host software required for host attach.

Verify Existing Software

Your host software plan may have assumed that your host system already had some of the required software installed. Verify that this software is installed and meets all requirements.

Install Required Software

Install all required host software according to your document distribution and host support environment plan. Refer to the appropriate IBM reference manuals for installation of specific program products.

Result

- ☐ Installation of all required document distribution and host support environment program products.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 10.4: Install Applications on Host

Process

The steps in carrying out this task are:

- Verify requirements
- Install code on host

Verify Requirements

Check your applications implementation plan to verify that all requirements have been met. Your plan should include:

- Data set/data base considerations
- Network and data communications system considerations
- Subsystem considerations
- General considerations, such as RACF, naming and assignment guidelines, and optional functions
- Tailoring the installation with the required systems

Install Code on Host

Install the applications code on the host. If IBM program products, refer to the appropriate IBM reference manual for assistance.

Result

□ Installation of the applications code on the host.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 10.5: Install Communications Network

Process

The steps in carrying out this task are:

- Install line profiles
- Install profiles for remote devices, sessions, nodes and local addresses
- Install lines
- Install modems and check out facilities
- Document system parameters

Install Line Profiles

Install the line profiles required on the system. Insure proper line type and conventional parameters are observed. Recheck security ID's on switched lines, and secondary addresses where required. See Chapter 7 for required profiles.

Install Profiles for Remote Devices, Sessions, Nodes and Local Addresses

Install all required profiles for your system, paying attention to session ID's, to stay in proper synchronization with remote nodes and security ID's. Verify all secondary addresses. See Chapter 7 for required profiles.

Install Lines

Insure the proper facilities are installed to support proposed networks. See Chapter 7 for required line profiles.

Install Modems and Check-out Facilities

Request vendor run appropriate tests to verify soundness of facilities.

The key reference for Document Distribution Planning is IBM 5520 Installation Manual-Implementation Planning' SC23-0713, the IBM 5520 Document Distribution/ Education Guide with foils and script, and IBM 5520 Planning Considerations and Management SC23-0716.

Document System Parameters

List and print copy of all profiles. Build profile recovery document for each system. Assemble, arrange into useable format and file network layout, information on lines, modems, printer locations, and all other information which may be required by service personnel.

Result

- ☐ A complete set of communication profiles.
- ☐ All required communication equipment installed and tested to be operational.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 10.6: Complete Hands-on Training

Process

The steps in carrying out this task are:

- Review requirements for hands-on training
- Identify personnel requiring hands-on training
- Review IBM self-study course materials

Review Requirements for Hands-on Training

Hands-on training on the actual system installed:

- Reinforces traditional classroom and self-study learning
- Transfers learning from test-system hands-on training
- Familiarizes end users with their new environment
- Prepares end users for implementation of office systems applications

To be effective, hands-on training should include instruction on:

- All system functions end users will be performing
- Specific text application designs
- Specific standards and procedures developed during implementation planning

Identify Personnel Requiring Hands-on Training

Hands-on training is required for:

- Lead operators
- Entry-Revision operators
- Principals/originators using the system

Make a list of all personnel requiring hands-on training. This list will be used for scheduling purposes.

Review Self-Study Course Materials

Verify that you have received all the necessary IBM self-study course materials. These materials are discussed in "Task number 3.1: Plan education for Project Team members and end users" in Chapter 3. You should complete the hands-on course before administering it to others.

Schedule Hands-on Training

Hands-on training should be completed as soon as the system is installed. The training schedule should give priority to those departments where applications will be introduced first. Schedule all personnel requiring hands-on training, and complete the training.

Result

☐ Completion of hands-on training before applications are implemented.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss with your Project manager.

- Start date: _____
- Completion date: _____

Task Number 10.7: Implement Applications Plan

Process

The steps in carrying out this task are:

- Review applications plan
- Brief Project Team members and end users
- Implement applications and initiate daily operations

Review Applications Plan

The development of a detailed applications plan is discussed in Chapter 6. This plan should include:

- Application designs
- Priorities for implementing specific applications
- A plan for testing applications
- A cutover plan for switching to the new system

Make sure the plan is complete before any applications are introduced into daily operations.

Brief Project Team Members and End Users

Implementation of the application plan will have a considerable impact on daily operations. End users have seen the changes coming with all the physical activity, installation of new equipment, briefings, and more specifically, the preliminary education they have received. Now that the applications are being implemented, the new system will affect their everyday activities. For the implementation to be effective, thorough briefings must be held with Project Team members, end users, and management in attendance. These briefing should include the following function:

- The Project Manager
- Text, File, and DD Implementer(s), Lead Operator(s), Entry-Revision Operator(s)
- Principals/originators
- Management of the department(s) where applications are being implemented
- Data processing department representatives

The applications plan should be discussed in detail so that all persons involved know how they are affected. Personnel should learn the immediate impact on their daily work, as well as future changes that will be taking place.

Implement Applications and Initiate Daily Operations

When all appropriate personnel have been briefed, implement the applications plan. Initiate priority applications, and begin daily operations.

Result

☐ Initiation of daily operations with office systems.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project manager.

- Start date: _____
- Completion date: _____

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Chapter 11. Perform Postinstallation Activities

Introduction

This chapter provides task descriptions for activities that should take place after the system is implemented and in use. These task descriptions will help you:

- Maintain end user support
- Plan ongoing education
- Evaluate application design
- Evaluate improvement against goals
- Evaluate and fine-tune system performance
- Refine procedures and update manuals
- Update system documentation
- Perform ongoing software maintenance
- Plan next installations

Task Number 11.1: Maintain End User Support

Process

The steps in carrying out this task are:

- Review end user support considerations
- Implement end user support

Review End User Support Considerations

Complete and continued support of end users is the key to a successful office systems implementation. You should develop an ongoing plan that maintains a high level of support for personnel responsible for making the system productive. Your ongoing plan should include:

- Motivating end users to accept and use the new system
- Training end users to take full advantage of the system's capabilities
- Maintaining an interactive relationship with end users to ensure a productive dialogue about the system
- Monitoring the progress of operations
- Monitoring and acknowledging the success of operations

The short-term and long-term success of your office systems depends on initial acceptance of the change and continued enthusiasm for the system. This demands a well-conceived and properly executed plan for supporting end users.

Implement End User Support

Management must maintain an interactive relationship with personnel using the system to ensure success. End user support must begin with implementation planning and continue with the ongoing operation of installed office systems. Develop a plan for supporting end users and implement it as soon as possible.

Your support plan may include:

- Regular status reports from departments where applications have been implemented
- Forms for feedback from end users
- Motivational posters, workshops, or newsletters

Result

- ☐ Implementation of a plan for maintaining end user support.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start date: _____
- Completion date: _____

Task Number 11.2: Plan Ongoing Education

Process

The steps in carrying out this task are:

- Review education requirements for end users
- Review education requirements for other personnel
- Plan education

Review Education Requirements for End Users

Lead operators, entry revision operators, and other end users are fully prepared to operate your office systems as soon as they have completed their training in system functions and applications. However, they may need additional training as new applications are implemented and new system functions are made available.

An ongoing education plan for end users should include:

- Training all end users as new applications and system functions are made available
- Updating all educational material as new applications or system functions are made available
- Updating files with information on IBM classes and self-study courses
- A plan for training new end users

Review Education Requirements for Other Personnel

You will also need to plan for the ongoing education of Text Administrators, Systems Implementers, and office systems management personnel. As key members of your office systems management team, these people must be kept up to date on new applications, system functions, and other IBM Office Systems developments. An ongoing education plan for these people should include:

- Attending new IBM classes and taking new IBM self-study courses
- Training new personnel in these key positions
- Keeping informed about general office automation advances

Plan Education

You should develop a plan for the ongoing education of all office systems personnel. For the information on suggested courses and scheduling of classes, see Task number 1.4: " Complete preliminary education of your Office Systems Project Team" in Chapter 1, and Chapter 3, "Develop Education plan."

Result

- ☐ A plan for the ongoing education of all office systems personnel.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 11.3: Evaluate Application Designs

Process

The steps in carrying out this task are:

- Review application evaluation considerations
- Implement evaluation strategy

Review Application Evaluation Considerations

An ongoing strategy is needed for evaluating your applications and application designs. This strategy should include:

- Evaluating existing application designs and refining them as appropriate
- Developing and testing new applications
- Monitoring new product announcements for their impact on your applications

As new products and system functions are announced and made available, you should evaluate them and:

- Incorporate them into existing applications as appropriate
- Reevaluate pending applications
- Consider new applications that will use the new capabilities

Implement Evaluation Strategy

Develop an ongoing strategy for evaluating applications and application designs. Your strategy should be implemented along with the systems and be a regular part of your office systems operations.

Result

- ☐ Ongoing evaluation and development of applications and applications designs.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 11.4: Evaluate Improvement Against Goals

Process

The steps in carrying out this task are:

- Identify established benchmarks
- Identify established improvement goals
- Evaluate success

Identify Established Benchmarks

At the beginning of your office systems project, you should have measured time spent doing various office activities. The values established for each activity were documented and used as benchmarks to establish goals for office improvement. Use the established benchmarks now to help you evaluate improvements with your installed systems.

Identify Established Improvement Goals

The benchmarks should have provided percentage improvements that could be expected in each office activity. They may also have been used to calculate other improvement factors. These improvements factors were applied to the benchmarks to establish improvement goals.

In addition to these very specific goals, the Project Manager may have established others based on short-term and long-term success criteria. All goals were documented by the Project Manager, and should be used now to evaluate the success of the implementation.

Evaluate Success

Improvement with your office systems should be evaluated only after applications have been implemented and daily operations are stabilized. Short-term success criteria should be applied no sooner than six months after implementation, and long-term success criteria should be applied no sooner than a year after implementation. You may want to repeat this task at regular intervals to evaluate improvement as applications and end users mature.

Result

- ☐ Evaluation of improvement brought about by office systems.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 11.5: Evaluate and Fine-Tune System Performance

Process

The steps in carrying out this task are:

- Review system evaluation considerations
- Fine-tune system

Review System Evaluation Considerations

The performance of your systems should be evaluated regularly. Your evaluation should include:

- Processor speed
- Processor storage
- Disk space
- Response time
- Throughput
- Line utilization
- Growth capabilities for:
  - Document library
  - Communications capabilities
  - Disk space
  - Device expansion

Evaluations of these performance characteristics will have to come from your information processing personnel.

The key references for evaluating system performance are:

- IBM 5520 Administrative System Planning Considerations & Management GC23-0716
- IBM 5520 Administrative System Installation Manual Implementation Planning SC23-0713

Fine-Tune System

The system should be fine-tuned based on regular evaluations of performance. Fine-tuning considerations include:

- Refining operational procedures
- Adjusting hardware requirements
- Monitoring the impact of new functions

Result

- ☐ Optimal performance of your office systems.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 11.6: Refine Procedures and Update Manuals

Process

The steps in carrying out this task are:

- Refine existing procedures
- Update manuals

Refine Existing Procedures

As applications mature and you evaluate and modify your operations, you will need to refine and update operating procedures, including:

- Security procedures
- Backup and recovery procedures
- Archiving procedures
- Printing procedures
- Communication procedures
- Problem determination and tracking procedures
- General operating procedures

Update Manuals

Any refinements or revisions to procedures should be documented and included in your procedures manuals.

Result

- ☐ Refined procedures and updated procedures manuals.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 11.7: Update System Documentation

Process

The steps in carrying out this task are:

- Review documentation requirements
- Update documentation

Review Documentation Requirements

As your office systems grow and develop, system parameters will change. You should keep your documentation up to date to ensure effective backup and recovery and to facilitate planning and implementation of future installations.

The original system was documented under "Task number 10.6: Document System Parameters" in Chapter 10. You should update that documentation whenever any of the following parameters change:

- System Profile
- Operator profiles
- Printer profiles
- Diskette profiles
- Document profiles
- Session profiles
- Device profiles
- Line profiles

Update Documentation

Update your documentation whenever any of the system parameters change.

Result

- ☐ Up-to-date documentation of all sytem parameters.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project manager.

- Start date: _____
- Completion date: _____

Task Number 11.8: Perform Ongoing Software Maintenance

Process

The steps in carrying out this task are:

- Review maintenance plan
- Implement plan

Review Maintenance Plan

An ongoing maintenance plan was developed under "Task number 8.12: Establish Software Maintenance Standards and Procedures" in Chapter 8. This plan should include:

- An overall maintenance plan
- Routine maintenance plans
- Emergency maintenance plans
- Maintenance application strategy
- Maintenance testing strategy
- Maintenance change control plans

Be sure to review the established software maintenance standards and procedures.

Implement Plan

Implement the ongoing plan for software maintenance as PTFs become available.

Result

- ☐ Effective software maintenance.

Schedule Planning

Before you begin this task, project your start and completion dates and discuss them with your Project Manager.

- Start date: _____
- Completion date: _____

Task Number 11.9: Plan Next Installations

Process

The steps in carrying out this task are:

- Review planning considerations
- Plan for future installations

Review Planning Considerations

Your experience with the first installation will facilitate planning and implementation of future systems. The best time to initiate plans for additional installations is immediately after your first installation is implemented, while your experience with the process is fresh in your mind.

To help plan for future installations, you should:

- Gather complete documentation of the first installation
- Review the first installation to determine what was accomplished and how it was accomplished
- Improve on implementation plans by incorporating what you have learned

Plan for Future Installations

Review your first installation and develop overall plans for improving your performance on future installations. Be sure to document all the specific activities that helped you to successfully implement the systems, as well as any roadblocks to be avoided in the future.

Result

- ☐ An overall strategy for improving the planning and implementation of future office systems.

Schedule Planning

Before you begin this task, project your start and completion dates.

- Start date: _____
- Completion date: _____

Appendix A. Project Team Organization

Introduction

The key to a successful implementation is an effective Project Team. To be effective, a Project Team must develop the technical knowledge and expertise needed to plan and install the system, while maintaining cooperative relationships with others who will use and benefit from the system. Selection of qualified Project Team members and organization of the Project Team is the first step in a successful office systems implementation.

Overall Responsibilities of the Project Team

The following list identifies the overall responsibilities of the Project Team. The Project Team will:

- Be responsible for completing the education necessary to effectively plan, install, and implement office systems
- Translate the organization's business objectives into specific applications and application designs
- Participate actively in the coordinated development of a comprehensive plan for implementing office systems
- Participate actively in the coordinated development of a schedule for implementing office systems, and complete assigned tasks on schedule
- Maintain close communication with end users before and after implementation of office systems to ensure success of the implementation

Organizing the Project Team

The Project Manager should make sure that Project Team members:

- Include the best qualified people for each Project Team function
- Enjoy the full support of the highest levels of management
- Are committed to completing the education necessary to fulfill their assigned responsibilities
- Are committed to planning, installation, and implementation of office systems
- Have been thoroughly briefed on the nature and scope of the project and the overall schedule
- Have been thoroughly briefed on their specific duties and responsibilities
- Are involved in key project meetings where objectives and individual responsibilities are defined and clarified

Long-Term Organizational Considerations

The Project Team concept is a short-term organizational change for the purpose of planning, installing, and implementing office systems. However, specific Project Team functions may become ongoing roles in an

office systems environment. The impact of these ongoing responsibilities on your current organization should be addressed.

- If Project Manager, Systems Implementer, Text, File and DD Implementers, Text Administrator, Lead Operator, and Training Specialist functions become a part of a long-term organizational change, there may be a need for new job descriptions.
- Individuals serving in these functions may have to split time between their new responsibilities and other regular duties, or they may have to be dedicated full-time to the new functions.

These and other considerations must be addressed in terms of the scope of the planned installation and the nature of your current organization.

Appendix B. Security

Introduction

In a data processing environment, security can be defined as the protection of data from accidental or intentional disclosure to unauthorized persons and from unauthorized modification. Deliberate unauthorized access is a concern and must be prevented. However, the primary security threat is unintentional modification or deletion of data by authorized users. In a distributed processing environment, where multiple users can access system facilities and stored data, there is a need for increased security measures to control both authorized and unauthorized access.

Security Requirements

In determining the nature and extent of security required and the design of a secure system, management must take a number of factors into account.

- Degree of data sensitivity: The nature of data an organization creates and stores is a major factor in determining the security required. Data that is not confidential does not require the level of security needed for highly sensitive information.

- Application of system functions in creating and storing sensitive data: Various system functions allow an operator to create, store, modify, and retrieve data. If the data is sensitive, those system functions need to be controlled.

- Equipment configuration: Configuration considerations include the number and location of displays and printers, whether there is a stand-alone processor or a host-attached system, and the size and set-up of a large distributed network of processors. Security requirements will differ according to the configuration.

- User environment: Whether users are online or offline, and whether user security clearances are the same or widely varying, are considerations that affect security.

In addition, certain subjective factors must be addressed.

- Employee loyalty and judgment: If the loyalty and judgment of users with access to sensitive data are considered to be good, security will benefit. However, if the nature of the organization requires access to the system by a large number of newer or less experienced users, tighter control of data access may be required.

- Involvement of outsiders: Customers, consultants, hardware and software vendors, and other nonemployees may participate in data processing activities or have some other exposure to the data processing system. If so, additional security measures may have to

be introduced to prevent unauthorized disclosure of data to nonemployees.

- Experience with security: If an organization has an existing security system with procedures for control of sensitive documents, this system may be modified to incorporate the requirements of office systems.

Security Tradeoffs

In designing a security system and developing regular security procedures, management must consider certain tradeoffs.

- Security versus cost: Security measures such as additional computer equipment, terminal keylocks, and vaults for storage all involve added expense. Management must consider the tradeoffs between the increased security offered by such measures and their cost.

- Restrictions on use: Security is achieved by controlling access to the system. The security benefits of these restrictions must be weighed against the benefits of easier access.

- Reduced system efficiency: Efficiency of the system may be reduced as a result of security measures requiring various identification, authorization, and audit procedures. The tradeoff between increased security and reduced efficiency must also be considered.

IBM 5520 Security

Securing IBM 5520 data depends on controlling access to the system and its functions. Several levels of access need to be considered.

- Device access
- System access
- Document access
- System service access
- Text processing access
- Files access
- Archiving access

Device Access

Physical security measures can be implemented to restrict unauthorized access to the IBM 5520 processor and display and printer terminals. Physical security measures include:

- Optional keylocks for the devices

- Badge, combination, or key locks on doors to areas where devices are located

- Location of the IBM 5520 System Unit in a room separate from the terminals, where only limited access is permitted

- Location of printers in areas where sensitive documents being printed will not be susceptible to unauthorized disclosure.

- Building security.

System Access

The IBM 5520 system has built-in security features for controlling access.

- A valid operator name is required, and password may be required to access the system.

- Passwords can be changed periodically to help maintain security.

- Operator passwords are not displayed when they are typed.

Since operator names and passwords are critical to any security scheme for restricting system access, procedures for controlling operator names and passwords are very important.

- Any printed lists of operator names or passwords should be stored in a secure place.

- In order to effectively maintain their secrecy, passwords should not be directly related to the operator's name, employee number, or other obvious or easily determined information.

- Consideration should be given to changing passwords periodically. However, tradeoffs will have to be considered in terms of time spent by the Lead Operator to manually change all passwords or to control other operators changing their own passwords.

- The Security Operator can use the SHP command to display passwords of operators as a means of control.

The following are suggestions for creating passwords:

- It is possible to use an algorithm to create passwords, but if discovered, all passwords based on the algorithm would also be discovered.

- Passwords are more effective if they are random, rather than based on any easily identifiable system.

- Restricting the use of repeated letters makes passwords more random.

- Many organizations allow operators to choose their own passwords with some control by the Security Operator.

Document Access

IBM 5520 access codes are used to control document access.

- Access codes (private, shared read, and shared revise)can be assigned to documents when they are named and stored.

- Making a document private restricts other operators from any access (even viewing) to that document.

- Shared read protects a document from change or deletion except by its owner (creator).

System Service Access

The ability to perform many system services can be restricted by the operator profile definition. This secures the system from unauthorized modification.

Archiving Access

Documents can be removed from the system and stored locally on diskettes.

Network Implementation Security

Considerations for network implementation security are:

- Node passwords
- Collection lists associated with specific operators and passwords
- Local address passwords
- Personal document passwords

Host Security

Securing host data depends on controlling access to the system and its functions. Several levels of access need to be considered.

- Device access
- System access
- Document access

Device Access

The same physical security measures discussed in connection with the IBM 5520 System Unit and its associated display stations can be used to control access to the host and host-attached terminals.

System Access

Since IBM 5520 operator names and passwords restrict access to the system, they restrict access to host functions from IBM 5520. However, host system software also has built-in security features for controlling access to the system.

- Host user table: Because the host may be servicing several IBM 5520s at the same time, an expanded system for identification of users is required. The host table should identify each user, access codes assigned to each user, and accounting information. Applications use the host user profile to identify users requesting host functions from the IBM 5520 subsystem for which that user is defined, and to identify users requesting host functions through another user who is not defined on that IBM 5520 subsystem or working for a requestor not defined in that user's host user table.

- Resource Access Control Facility (RACF): This program product is available for host users running in an MVS environment. It provides additional controls on access to host functions and data. These controls are used for the submission of jobs and to specify if particular subsystems can access host applications.

The same general considerations for developing standards and procedures for IBM 5520 local addresses and passwords apply to host IDs and passwords.

Security Summary

Security in a distributed processing environment can be achieved only by a comprehensive effort. Those responsible for developing security standards and procedures for office systems should learn all they can about the security features offered by the systems, as well as general data processing and physical security measures. This information should then be incorporated with your organization's existing security system to develop a comprehensive, coordinated security plan.

The following table summarizes the various levels of access, their interrelationships, and how access is controlled.

Level of Access	IBM 5520 Control	Host Control
Device access	Physical means, key-locks, locked doors, security badges, and so on	Physical means, key-locks, locked doors, security badges, and so on
System access	Requires valid operator number (user ID) and password	Requires host user profile, profile definition, valid operator number, and password
Document access	Controlled by get and delete codes	Controlled by access codes
System service access	Controlled by operator profile definition	RACF for additional controls on access to functions and data
Text processing access	Controlled by operator profile definition	N/A
Archiving access	Any operator can access archive function	Controlled by operator profile definition

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Appendix C. Naming Standards

Introduction

The IBM 5520 uses a number of names and values for document storage and retrieval. These include fields for document names, authors, passwords, dates, owner IDs, and so on. Naming standards are specific guidelines and procedures you establish for entering the information required for each of the document storage and retrieval fields. All appropriate IBM 5520 fields are discussed in this appendix, although some, such as document names and passwords, require more development effort than straightforward IDs and access codes.

Why Naming Standards are Important

There are three main reasons for establishing and enforcing effective naming standards.

- Orderly storage: Any good filing system, be it manual or automated, provides a means for the organized, logical storage of documents. When such a system is in place, you don't waste time trying to decide where something should be filed. In the automated office environment, a logical, organized procedure for determining file names and search terms will minimize front-end filing time.

- Effective retrieval: An effective filing system allows you to find a stored document quickly. In the IBM Office Systems environment, a standardized system for naming documents, entering authors names, and so on, is essential for making the most effective use of Host retrieval capabilities.

- Security: The primary security threat in a distributed processing environment, where multiple users can access system facilities and stored data, is the unintentional modification or deletion of data by authorized users. A rigorously enforced system for naming documents and controlling IDs and codes for accessing data will enhance your security effort.

Naming Considerations

A number of factors should be considered in developing naming standards.

- Uniqueness: A unique entry should be keyed in for each document name, file name, authors, and passwords. Uniqueness is required for system security and for effective retrieval of documents.

- Ease of entry: Consider ease of entry, minimizing the time it takes to key in the necessary information. Naming conventions that require complicated codes, or excessive keyboard strokes should be avoided.

- Ease of remembering: Names should be explicit, concise, and wherever possible, easily remembered. This precludes the need for printed document lists and makes storage and retrieval faster and easier.

- Consistency: Your naming standards should stress consistency. Avoid a complicated system that produces obscure strings of letters and numbers. A system that provides consistent names will facilitate entry and retrieval of information.

- Relevance: Your naming system should be able to encompass memos, letters, statistics, budgets, and other internal company documents, but also books, periodicals, technical reports, government documents and regulations, blueprints, numeric data, and other online data bases. Your standards should provide for the positive identification, adequate description, and successful retrieval of all classes to be stored in the system.

- Enforcement: Naming standards are effective only if they are enforced. Make sure all naming standards and procedures are documented in your procedures manuals, that operators are trained to use the standards, and that operators adhere to the standards published.

Technical Requirements for IBM 5520 Fields

The following table summarizes technical requirements for IBM 5520 fields. For the most up-to-date technical requirements for IBM 5520 fields, refer to the latest edition of IBM 5520 Installation Manual, Implementation Planning SY23-0713.

IBM 5520 FIELD	CHARACTER REQUIREMENTS	OTHER CONSIDERATIONS
Document name	Alphameric characters up to 30 in length	Must be a unique name for on-line document Library
Document format source	Any displayable characters up to 30 in length or default	Format selected must be a document currently in the document library
Type	Text - default File File description Stored procedure	
Originator	Alphameric characters up to 20 in length or blank	Assigned to operators; no naming standards required
Date	Total of 8 characters or default	Third and sixth characters are interpreted as delimiters separating parts of the date
Access	Private - default Shared read Shared revise	
Document charge number	Value from 0000 to 9999 or default	
Retention period	Number days up to 999 or default	
Comment	Alphameric characters up to 60 in length or blank	
Use	Yes - default No	

IBM 5520 Document Names and Host Document File Names

The considerations for establishing standards for IBM 5520 and Host document names are the same. Naming conventions for documents should facilitate their storage and retrieval.

The first consideration is to maintain a tie between document name and content of the document. Even if you develop a code for document names, a pointer to the content will aid retrieval significantly.

Avoid using limited conventions, such as the class of document followed by a number. For example, letter1, letter2, letter3, is a simple naming convention, but tells you little about the document. It is better to create a unique name containing relevant information, such as a code for the contents of the document, creation date and hour, department where the document was originated, the originator, the operator, and so on.

Abbreviations are useful, but try to keep them easily recognizable. Do not create abbreviations that can be interpreted in several ways.

If your organization has existing guidelines or policies for naming documents and filing, try to transfer existing policies to your office systems. For examples, if people are used to looking for filed documents first by type, then by date, then by author, you can establish naming standards that reflect this sequence.

Another option is to establish a fairly arbitrary rule, such as author's initials and date, and use the descriptor field for further identification.

Host and IBM 5520 Passwords

The considerations for establishing standards for IBM 5520 and Host passwords are the same.

It is possible to use an algorithm to create passwords, but if discovered, all passwords based on the algorithm would also be discovered.

Passwords are more effective if they are random, rather than based on any easily identifiable system. Restricting the use of vowels tends to make passwords more random, as does restricting the use of repeated letters.

Many organizations allow operators to choose their own passwords with some control by the Lead Operator. This provides unique passwords that cannot be discovered by breaking an algorithm or obtaining a printed list.

IBM 5520 Operator Names

Operator names are assigned by the user and require no naming standards.

Host Requestors, Authors, and Recipients

Requestors, authors, and recipients are usually peoples' names. You can decide to enter names any way you want, but the naming standards you decide on should be rigorously enforced and used consistently for all three fields.

A few suggestions for standardizing names are:

- Put the surname first, followed by the first and middle initials. For example:

  Jones, RT
  Schwartz, BT

- To differentiate between people with identical names, add titles, rank, or office, abbreviated as necessary:

  Smith, R. VP
  Smith, R. GM

- Abbreviate or truncate names that exceed the 14-character limit:

  Riemenschneider, H
  R'schneider, H

Since spaces and commas take up character spaces, you may want to avoid using them to stay within the 14-character limit.

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Appendix D. Backup and Recovery

Introduction

Backup of your office systems protects you from serious system failure by storing essential system information on diskettes. If there should be a serious system fault, the backup diskettes can be used to recover the system with a minimum of rekeying.

Backup and recovery differ from archiving and retrieval in purpose more than process. The purpose of archiving is to free up document library by transferring the information to diskettes. The archived information is then retrieved when you want to use it again. The purpose of backup is to store all essential system information on diskettes so you can recover your information in the event of a serious system fault.

Backup is essential for the protection of your system and the information stored in your system. You must develop an overall backup and recovery strategy that addresses all distributed and host backup considerations.

Backup Methods

There is one way to back up your system:

- Archive data and maintain records of system information

If a system fault occurs, you can quickly restore your entire system by restoring the diskettes. The frequency with which you backup your system using archive depends on the volatility of your system.

Backing Up IBM 5520 Profiles

System information, including all profile definitions can be created using a profile recovery document and archiving it to diskette. If the system must be reloaded or profiles recreated, retrieve this document in normal operations mode and build profiles in special operations mode.

Who Should Back Up Distributed Information

You should designate those individuals responsible for regular backup of system information, profile definitions, document library documents, etc., and ensure that they perform the appropriate backup procedures as required.

Backing Up Host Information

You should designate those individuals responsible for regular backup of system generation information, operator profile definitions, queue definitions, document library documents etc., and ensure that they perform the appropriate backup procedures as required.

You can back up host information by:

- Dumping data sets or disk packs on tape
- Maintaining IMS and CICS logs

Host information can be dumped as a whole, or by categories. If IMS and CICS logs are maintained, they can be merged with the information dumped on tape to give you a relatively up-to-date system. The system will be as up-to-date as the most recent dump and IMS and CICS logs.

When to Back Up Host Information

You should establish a schedule for regular backup of host information. You must decide how often you will back up host information, as the procedures represent a cost in terms of both time and money.

Frequent backup of host information will minimize the damage caused by loss of important data, and may be less time-consuming and less costly than recreating the lost data. In planning a regular backup schedule, you must consider tradeoffs between the benefits of frequent backup and the time spent performing backup tasks.

Who Should Back Up Host Information

You should designate those individuals responsible for regular backup of host information, and ensure that they perform the appropriate backup procedures as required.

General Back Up Considerations

General factors to consider in developing your overall backup strategy for distributed and host information include:

- Work-flow backup
- Physical backup
- Vault and off-site storage
- Enforcement

Work-flow Backup

You will need to develop contingency plans for maintaining your work flow during system modifications or system failure. You should be able to perform your most critical job functions if your systems are down for a significant length of time. This may require performing your old procedures and new procedures in parallel during a cutover to a new application, or maintaining manual procedures to be used in case of emergency.

Physical Backup

You should also consider the advantages of physical backup of your office systems hardware. You may want to install additional equipment so that an isolated hardware failure does not shut down your entire network.

An example of physical backup might be two lines between your IBM 5520 and the host instead of one, so that a connection can be maintained if one of the lines fails. Another example is to avoid connecting multiple systems on a single line. If each system has its own lines, line failure will only affect a single system.

Vault and Off-site Storage

Backup tape and diskettes are of no value if they are lost, stolen, damaged, or destroyed. You may want to consider storing copies of backup tapes and diskettes in a vault, or off-site at another location.

Enforcement

Make sure your backup plans are effectively implemented. This will require documentation of all standards and procedures for the personnel responsible for backup. It may also require specific training and on-going reinforcement.

Develop Your Overall Backup Strategy

Review carefully all backup concerns, backup procedures, and tradeoffs between backup and cost. Then analyze the specific requirements of your organization and develop a comprehensive backup strategy to meet your needs.

Your strategy should include developing standards and procedures for backup of both distributed and host information. The standards and procedures you develop should include:

- What information is to be backed up
- How it is to be backed up
- When it is to be backed up
- Who is responsible for backing it up

References for developing backup and recovery procedures are listed in "Task number 8.8: Establish backup/recovery standards and procedures" in Chapter 8. The information contained in those publications may help you develop your strategy. Use copies of the Backup/Recovery Worksheet on the following page to help you develop a backup and recovery plan.

Backup/Recovery Worksheet

What is to be backed up?	How is it to be backed up?	When is it to be backed up?	Who is responsible for backing it up?
DISTRIBUTED DATA			
Profiles			
Document Library Documents			
HOST DATA			

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Appendix E. Help Desk

Introduction

A Help Desk is the concept of a central clearinghouse where operational queries can be directed. You may want to consider establishing a Help Desk and making it an integral part of your office systems operation.

How a Help Desk Might Work

If a Help Desk is implemented, personnel should be stationed at the Help Desk throughout the working day and be available to assist callers with both procedural and trouble situations. This personnel may have additional responsibilities, depending on the size and organization of your installation. The Help Desk should be staffed by:

- A DP specialist trained on IBM 5520, host applications, and host central programs

- A Text Administrator or Senior Lead Operator available to discuss problems, solutions, and applications with Lead Operators requesting help and to relay the necessary information to the DP specialist

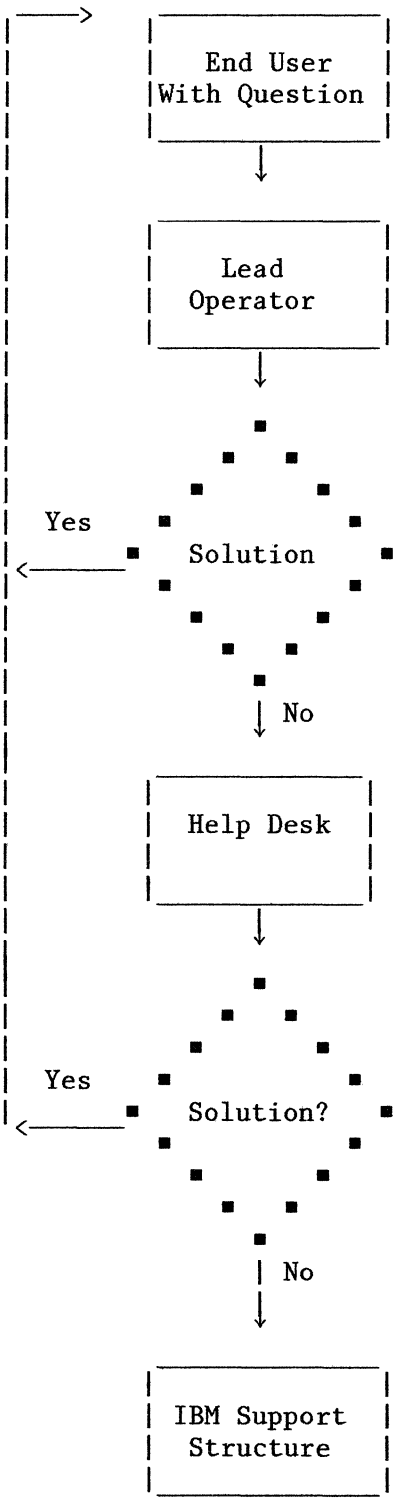
You may want to separate Help Desk activities into procedural and trouble questions. Procedural questions would be handled by the Text Administrator or Senior Control Operator, and would be restricted to end user questions concerning use of the system. Trouble questions requiring problem determination would be handled by the DP specialist.

Regular meetings should be scheduled, or newsletters should be distributed, to discuss problems and review new problem determination procedures or reference materials.

All queries collected by the Help Desk can be investigated, and if an internal solution cannot be found, the problems can be discussed with IBM. This leads to requirements for processing queries and documenting problems.

Developing a Help Desk Organization

You need to develop standard procedures for processing both procedural and trouble questions. The problem-solving organization might look like this:



Responsibilities in the Help Desk Organization

End Users: An end user with system trouble or a procedural question should try to use the available procedures manuals to solve the problem before contacting others. If a solution cannot be found, the local Lead Operator should be contacted for assistance. If it is a system problem rather than a procedural question, the Lead Operator should document the problem.

Lead Operator: The Lead Operator should try to answer procedural questions or solve problems at the local level. If it is a system problem that cannot be readily resolved, the problem should be documented. The Lead Operator should record the problem and take a forced dump if required, as this may be required if IBM is called in to solve the problem. If the problem remains unsolved at this level, the Lead Operator contacts the Help Desk.

Help Desk: If a call reaches the Help Desk, it is probably a fairly complicated procedural question or an undetermined system problem. The DP specialist and Text Administrator or Senior Lead Operator should be able to solve all but the most serious problems. At this point, if a problem still exists, the Help Desk personnel must be able to provide IBM with detailed documentation of the problem and the system environment, and be able to provide a clear and complete explanation. The IBM support structure and requirements for contacting IBM with a problem are discussed in Appendix F.

General Considerations for Establishing a Help Desk

A number of general considerations should be addressed when establishing a Help Desk. The first is the concept of "one call" help. The end user contacts the local Lead Operator for assistance. If the Lead Operator needs help, the Help Desk is called. At this point, the problem is handled behind the scenes until a solution is found. The end user and local Lead Operator should not be required to make successive calls in search of an answer.

The Help Desk should also be "end user friendly." People contacting the Help Desk should be able to explain their problem in end user application terms, and should receive help in those same terms.

The Help Desk should be operational throughout the normal workday, whenever people are normally using the system, so that help is available when needed.

The Help Desk may be the primary interface between your office systems and data processing personnel. A good working relationship should be developed between these people.

Finally, you must consider documentation. Documentation of system messages and the system environment when trouble occurs is very helpful for problem determination, and is required if IBM becomes involved. For a discussion of problem determination, including a list of problem reporting tools, see "Task number 8.11: Establish problem determination and tracking standards and procedures" in Chapter 8. Authorized Program Analysis Reports (APAR) are discussed in Appendix F, "IBM Support Structure."

There is an additional need for documenting Help Desk procedures. If personnel working the Help Desk are reassigned, proper documentation will allow new Help Desk personnel to step in and contribute immediately.

Appendix F. IBM Support Structure

Introduction

IBM 5520 hardware and software is supported by IBM Service Representatives.

Use the IBM Support Structure Flowcharts on pages F-2 and F-3 to determine which of the products you are installing are supported centrally, and which are supported locally. You can then use the flowcharts to identify the proper procedures for IBM hardware and software problem determination.

Other aspects of the IBM support structure you need to understand include:

- APAR Procedures
- Contacting IBM
- Mixed vendor considerations

APAR Procedures

An Authorized Program Analysis Report, G120-0482, or APAR, may be required when you report software problems to IBM. The IBM 5520 has an on-line APAR function called from the 'Problem Determination Menu'. This function creates the documentation to be submitted with a IBM 5520 APAR.

Contacting IBM

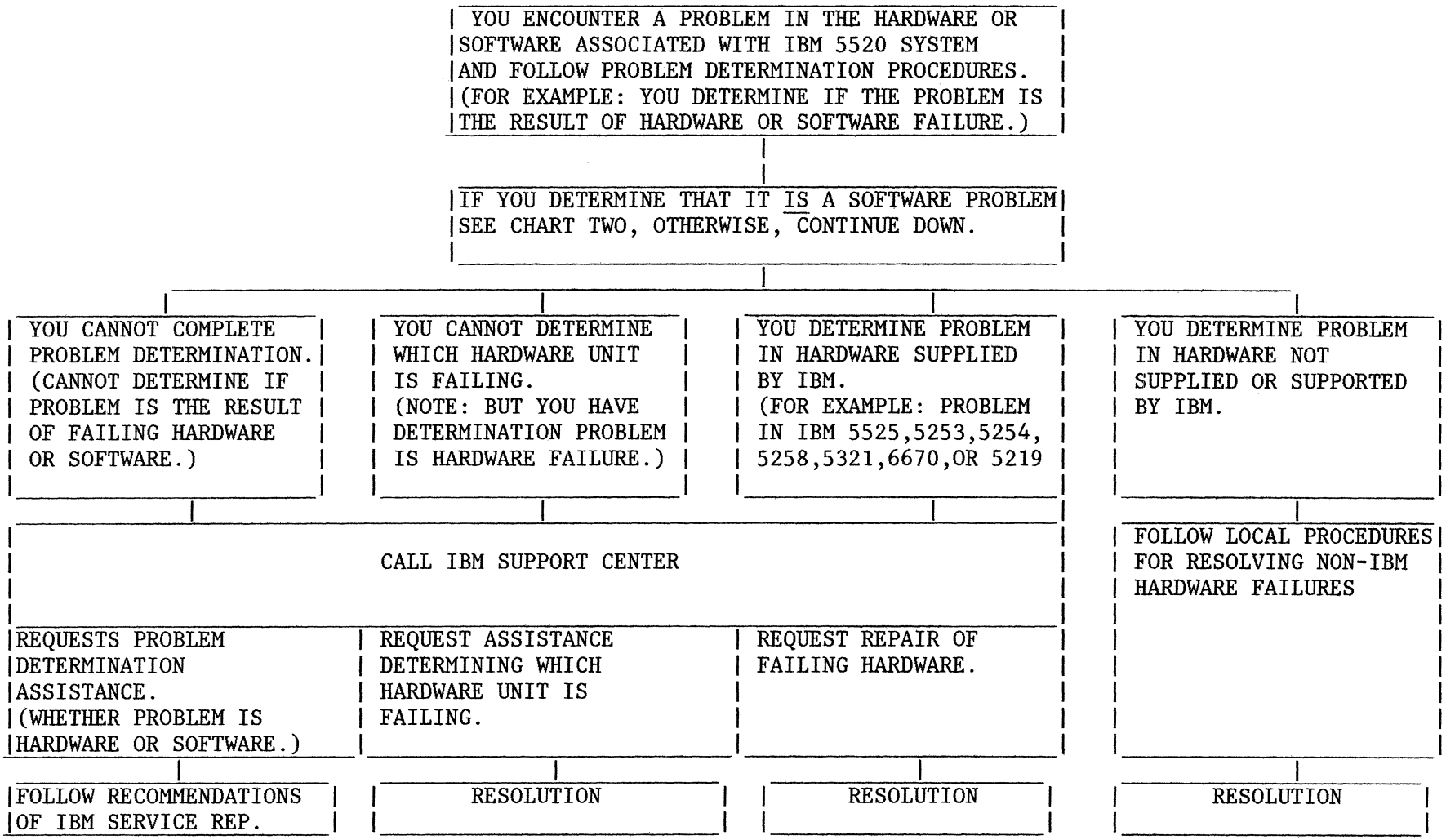
Your Help Desk personnel will be responsible for contacting IBM. They should be familiar with IBM Service Representatives and Program Support Representatives, and the requirements for reporting problems.

Mixed Vendor Considerations

IBM is not responsible for non-IBM hardware, software, modems, and telecommunications companies' communications lines. Also, if IBM performs a problem determination activity leading to a determination that it is a non-IBM problem, you may be responsible for the charge. For detailed information on mixed vendor environment terms and conditions, contact your IBM Marketing Representative.

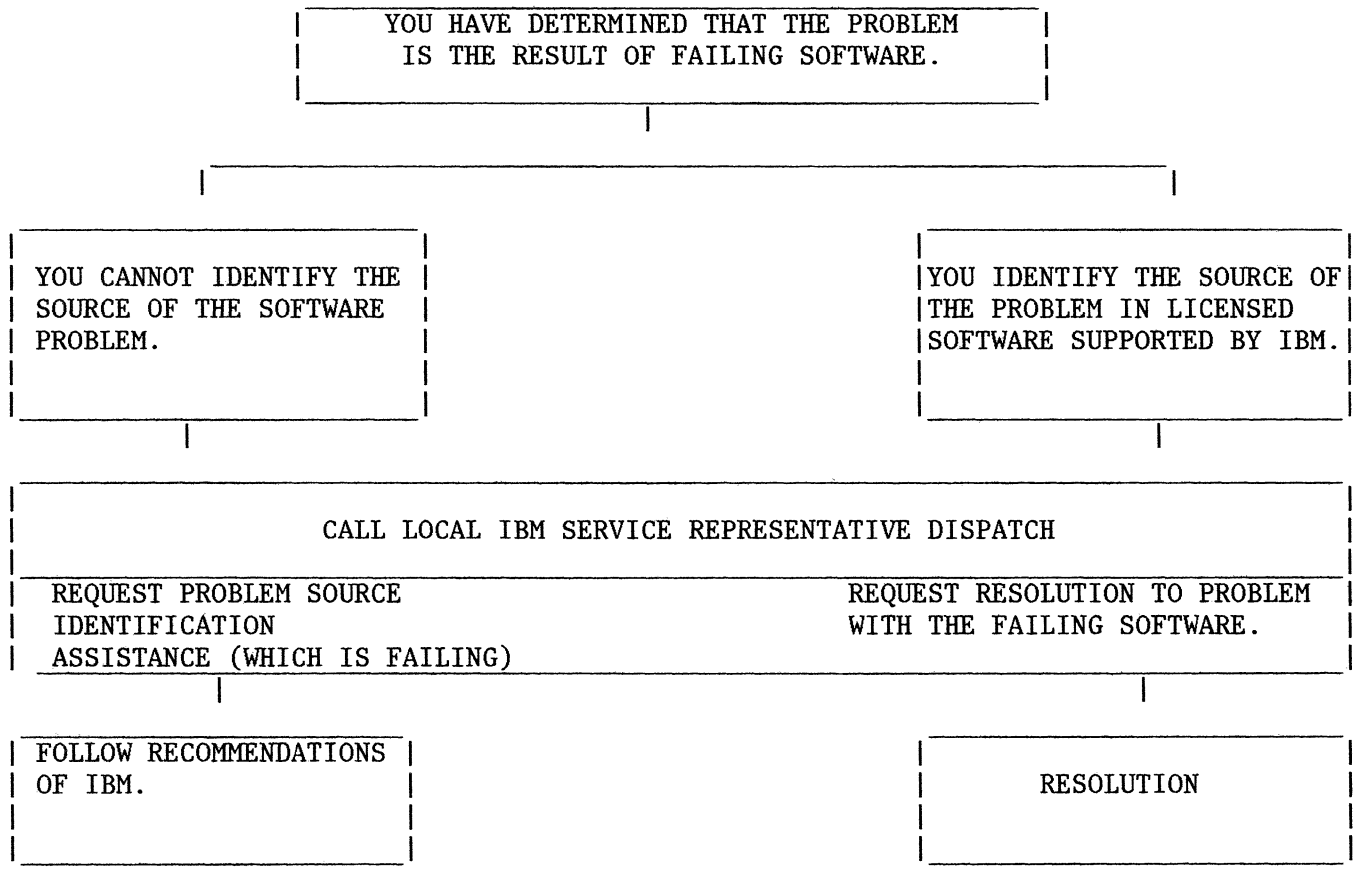
Guide to the IBM Support Structure for IBM 5520 Customers-Chart One

Use the following flowchart to identify the proper problem determination procedures for hardware or software system failures.



Guide to the IBM Support Structure for IBM 5520 Customers -- Chart Two

Use the following flowchart to identify the proper determination procedures if you have determined the problem to be a software failure.



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Appendix G. Glossary

This glossary defines many of the IBM 5520 terms used in this guide. Use the glossary to find the definition of any term with which you are not familiar.

This glossary also includes definitions developed by the American National Standards Institute (ANSI) and the International Organization for Standardization (ISO). This material is reproduced from the American National Dictionary for Information Processing, copyright 1977 by the Computer and Business Equipment Manufacturers association, copies of which may be purchased from the American National Standards Institute, 1430 Broadway, New York, New York 10018.

ANSI definitions are preceded by an asterisk (*), and ISO definitions are preceded by (ISO).

Alphanumeric. *Pertaining to a character set that contains letters, digits, and usually other characters, such as punctuation marks. Synonymous with alphameric.

archive. To record a copy of a document on a diskette.

archive queue. A series of requests to be executed for documents to be archived on diskette.

archive to diskette. A place where you can send copies of documents for storage.

author. In IBM 5520, the name of the person who wrote the document.

automated text. The creation of documents by entering variable information into patterns and standard paragraphs that provide preestablished text.

batch. A group of records or data processing jobs brought together for processing or transmission one after another.

background task. A task, such as printing or paginating which is performed by the system and allows the operator to perform other tasks.

character. A letter, number, space, punctuation mark.

communication controller. A type of communication control unit whose operations are controlled by a program stored and executed in the unit.

communication line. Any physical link, such as a wire or a telephone circuit, that connects one or more remote terminals to a communication control unit, or connects one communication control unit with another.

Configuration. (1) The creating and customizing of a IBM 5520 system to meet the user's requirements. (2) The group of display stations, printers, and features associated with IBM 5525 System Unit.

continuous paper. A series of connected sheets of paper. The paper usually has holes along the sides to guide it through the printer and is perforated between sheets for separation after printing.

data base. *A collection of data fundamental to an organization, usually stored as a library or set of libraries in a device.

document library. A collection of related documents on diskettes or on disk storage in a prescribed arrangement.

Document name. A name assigned to a document when the document is created on a system.

delete. To remove a document from document library or from diskette.

delete multiple. A request for archived multiple documents to be deleted from diskette.

delimiter. One of certain punctuation marks used to separate entries from each other when typed in a single line (such as the slashes between the date 06/27/81).

disk storage. The direct access storage that is available in a IBM 5525 System Unit for document.

diskette. A thin, flexible, magnetic disk enclosed in a semigrid protective jacket. IBM 5520 can store documents via the archive function on to diskettes.

display. *(ISO) (1) To present an image on a display screen. (2) A display station.

document. A named piece of text saved in the document library or archived on diskette.

document library. An area of disk storage where all user and system documents reside.

document, private. In IBM 5520, a document in the document library that can be accessed only by its owner.

document shared read. In IBM 5520, a document in the document library that can be read by anyone, but cannot be changed except by the owner.

document, shared revise. In IBM 5520, a document in the document library that can be accessed by anyone that has access to the system.

document name, IBM 5520. Up to 30 letters or numbers that the creator assigns to a document to help distinguish it from other documents.

dump. *(ISO) To write the contents of a storage, or part of storage, usually from an internal storage to an external medium, for a specific purpose, such as to allow other use of the storage, as a safeguard against faults or errors, or in connection with debugging.

end user. The sources and destinations of information. End user may be display station operators or principals.

enter. To type characters or use special function keys at a keyboard.

entry. An element of information in a field, table, list, queue, or other organized structure of information.

field. A defined area in a record, buffer, or display.

file. A collection of records treated as a document in the IBM 5520 document library. Also, the fixed disk.

file description. The document that defines the format of records and fields in a file.

fixed disk. The internal storage device on which programs and documents are stored.

forced dump. A method to record the status and contents of the system when it is unable to continue due to an error.

format. A set of specific conditions or parameters which define the position or appearance of some item, such as text on a page or fields in a record in a file.

hardcopy. Tangible printed page on paper as opposed to a display or a document on a diskette or mag card.

hardware. The equipment such as the workstation, printer or system unit.

housekeeping. Work that does not contribute directly to managing text, but does contribute directly to the efficiency of the system. For example, making space in document library by deleting documents.

implementation. The act of planning, installing, and putting a system into use.

installation. (1) A particular system, in terms of the work it does and the people who manage it, operate it, and use the results it produces. (2) The act of putting in place a system, device, or application.

local address. The eight-character identification of an operator or receiver/sender in a node that is used in a document distribution network.

message. Information transmitted between two operators, between an operator and a system, or between IBM 5520 and the lead operator.

node. Either an IBM 5520 or IBM System/370 system configured in a document distribution network.

non-switched (line). A telephone line used for communications which is permanently connected to the equipment.

online. The state of being readyfor use (attached and operational).

operator ID. An individual's identification for using the system.

operator profile. Information entered by a lead operator telling what functions of the system an operator can use, how the operator's documents are printed, and the format of the operator's documents.

owner. The owner of the document is the operator name entered when the document was created on the IBM 5520.

paginate. To adjust page and/or line endings and resolve embedded instructions in a text document. The tasks are processed by background task (PGN) and foreground task within the document (IPN).

password. A group of four letters and numbers that you must enter before you can use the system if you have optionally decided to use password for security.

port. Adapter.

principal. A user on whose behalf an operator is working.

print queue. A series of requests waiting to be sent to a printer.

proc check (processor check). A condition in the System Unit which causes a red light to be turned on and all processing to be halted. This condition is caused by the hardware or software encountering an error condition which cannot be handled by normal error processing.

processor. Another word for a computer.

prompt. A message displayed on the screen telling an operator to enter some information when using the system.

queue. A list of things you have told the system to do.

queue request. One of the items in a queue waiting to be done.

recipient. A person to whom a IBM 5520 document is directed.

record. The unit of a file that contains fields of information.

remote. (1) In data communications, pertaining to devices that are connected to a data processing system through a data link. (2) In document distribution, any devices that are compatible with the IBM 5520 system via communications line.

response. The action taken by an operator when a prompt or message is displayed.

response time. The time required for the system to honor a request for some function or process.

retrieve. A list of requests for documents to be retrieved from diskette and put in storage.

screen. The display surface of display stations where documents are viewed.

security. The protection of data from accidental or intentional disclosure to unauthorized persons and from modification.

session. (1) In Systems Network Architecture, the period of time when a program or system service and the host system can exchange data according to protocols. (2) From an operator's viewpoint, the period of time when the operator engages in a conversation with an interactive system or subsystem; usually, the elapsed time from signing on to signing off.

setup. The definition of the parameters needed to describe the usage of a device such as the printer or diskette. There can be several setups for each device depending on the requirements for the particular job using the device.

shared resource. The ability of some resource, such as a fixed disk or the System Unit to be used by several users at the time by sharing the available time and processing capability. The IBM 5520is a shared resource system.

software. The programs that run in a computer or the system unit.

SNA. Systems Network Architecture.

stand-alone operation. In the 5520 Administrative System, a system that does not have another 5520 system, remote device or a host connection.

stand-alone system dump. A system service that dumps copies of all (or part of) processor storage (or selected parts of storage) to document library for archive.

stored procedure. A document that contains a set of tasks created by an operator by using menus in a specific order to perform a job.

switched (line). A telephone line used for communications which requires that the number be dialed.

System Network Architecture (SNA). The total description of the logical structure, formats, protocols, and operational sequences for transmitting information units through the communication system.

user name. An identification of up to eight characters identifying a 5520 user.

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Appendix H. Planning Aids

PROJECT CONTROL WORKSHEET

TASK NO.	TASK	PROJECT TEAM FUNCTION	PERSON ASSIGNED	DATE TASK RECEIVED	REVIEW DATE	ESTIMATED START DATE	ESTIMATED COMPLETION DATE
1.0	INITIATE OFFICE SYSTEMS PROJECT						
1.1	Validate the equipment and software order	PM					
1.2	Obtain publications needed for planning	PM					
1.3	Select your Office Systems Project Team	PM					
1.4	Complete Preliminary Education of your Office Sys Proj Team	PM					
1.5	Develop Overall implementation strategy	PM					
1.6	Establish improvement goals	PM					
1.7	Establish project control	PM					
1.8	Assign implementation tasks	PM					
1.9	Develop working relationship between Office Sys & Data Proc personnel	PM					
1.10	Hold Office Systems Project Team kickoff meeting	PM					
1.11	Develop end user support	PM/TA/SI					
2.0	PLAN PHYSICAL ENVIRONMENT						
2.1	Identify physical planning requirements	PM					
2.2	Check existing facilities	PM					
2.3	Develop floor plans	PM					
2.4	Order and install cables	PM					
2.5	Verify availability of host communications equipment	SI					
2.6	Order furniture and office alterations	PM					

PROJECT CONTROL WORKSHEET

TASK NO.	TASK	PROJECT TEAM FUNCTION	PERSON ASSIGNED	DATE TASK RECEIVED	REVIEW DATE	ESTIMATED START DATE	ESTIMATED COMPLETION DATE
3.0	**DEVELOP EDUCATION PLAN**						
3.1	Plan education for Project Team members and end users	PM					
3.2	Plan for hands-on access to a system	TA/LO					
3.3	Schedule education	PM					
3.4	Develop end user courses	TA/LO					
3.5	Implement your office systems	TA					
4.0	**OBTAIN PUBLICATIONS**						
4.1	Identify publications reqs.	TA/LO					
4.2	Enter an SLSS subscription	PM					
4.3	Develop a publications update and distribution plan	TA					
5.0	**ORDER SUPPLIES**						
5.1	Identify necessary supplies	TA/CA					
5.2	Establish ordering procedures	PM					
6.0	**DEVELOP APPLICATIONS PLAN**						
6.1	Identify applications						
6.2	Establish applic. priorities	PM					
6.3	Design applications	TA/LO					
6.4	Establish cutover plan	TA/LO					
6.5	Develop applications test plan	TA					
6.6	Coordinate text and nontext applications	TA					
7.0	**DEVELOP SYSTEM PLAN**						
7.1	Plan hardware installation	TA					
7.2	Plan installation licensed program product	SI/TA					
7.2.1	Plan profiles	TA/LO					
7.2.2	Plan network layout	TA/LO					
7.3	Plan DB/DC,SNA,and host support environment	SI					
7.4	Plan host code installation	SI					
7.4.1	Plan required host parameters	SI					

PROJECT CONTROL WORKSHEET

TASK NO.	TASK	PROJECT TEAM FUNCTION	PERSON ASSIGNED	DATE TASK RECEIVED	REVIEW DATE	ESTIMATED START DATE	ESTIMATED COMPLETION DATE
8.0	**DEVELOP STANDARDS & PROCEDURES AND PREPARE MANUALS**						
8.1	Establish security standards and procedures	PM/TA/LO					
8.2	Establish naming standards and procedures	TA/LO					
8.3	Establish document format standards and procedures	TA/LO					
8.4	Establish printing standards and procedures	TA/LO					
8.5	Establish document retention standards and procedures	TA/LO					
8.6	Establish archiving standards and procedures	TA/LO					
8.7	Establish backup/recovery standards and procedures	TA/LO					
8.8	Establish housekeeping standards and procedures	TA/LO					
8.9	Establish communication standards and procedures	TA/LO					
8.10	Establish problem determination and tracking standards & Proced	TA/LO					
8.11	Establish software maintenance standards and procedures	SI					
8.12	Prepare procedures Manuals	PM/TA/SI					
9.0	**PERFORM PHYSICAL INSTALLATION**						
9.1	Confirm preparation of the physical environment	TA					
9.2	Schedule delivery	TA					
9.3	Perform physical installation	TA/LO					

PROJECT CONTROL WORKSHEET

TASK NO.	TASK	PROJECT TEAM FUNCTION	PERSON ASSIGNED	DATE TASK RECEIVED	REVIEW DATE	ESTIMATED START DATE	ESTIMATED COMPLETION DATE
10.0	IMPLEMENT SYSTEMS AND APPLICATIONS						
10.1	Install licensed program product	SI/LO					
10.2	Install all profiles	LO					
10.3	Install DB/DC,SNA,and host support environment	SI					
10.4	Install applications on host	SI					
10.5	Create file descriptions	SI					
10.6	Document System parameters	TA					
10.7	Complete hands-on training	LO					
10.8	Implement applications plan	TA/LO					
11.0	PERFORM POST INSTALLATION ACTIVITIES						
11.1	Maintain end user support	PM					
11.2	Plan ongoing education	TA/LO					
11.3	Evaluate application designs	TA/LO					
11.4	Evaluate improvement against goals	TA					
11.5	Evaluate and fine-tune system performance	SI					
11.6	Refine procedures and update manuals	TA/LO					
11.7	Update system parameters documentation	TA					
11.8	Perform ongoing software maintenance	SI					
11.9	Plan next installation	PM					

IMPLEMENTATION PLANNING CHART

TASK NO.	TASK	PERSON RESPONSIBLE	START DATE	END DATE	SCHEDULE (UNITS=)												DATE TASK COMPLETED	REMARKS
1.0	INITIATE OFFICE SYSTEMS PROJECT																	
1.1	Validate the equipment and software order																	
1.2	Obtain publications needed for planning																	
1.3	Select your Office Systems Project Team																	
1.4	Complete preliminary education of your Office Systems Project Team																	
1.5	Develop overall implementation strategy																	
1.6	Establish improvement goals																	
1.7	Establish project control																	
1.8	Assign implementation tasks																	
1.9	Develop working relationship between office systems and data processing personnel																	
1.10	Hold Office Systems Project Team kickoff meeting																	
1.11	Develop end user support																	

IMPLEMENTATION PLANNING CHART

TASK NO.	TASK	PERSON RESPONSIBLE	START DATE	END DATE	SCHEDULE (UNITS=)	DATE TASK COMPLETED	REMARKS
2.0	**PLAN PHYSICAL ENVIRONMENT**						
2.1	Identify physical Planning requirements						
2.2	Check existing facilities						
2.3	Develop floor plan						
2.4	Order & install cables						
2.5	Verify availability of host communications equipment						
2.6	Order furniture and office alterations						
3.0	**DEVELOPMENT EDUCATION PLAN**						
3.1	Plan education for Project Team members and end users						
3.2	Plan for hands-on access to a system						
3.3	Schedule education						
3.4	Develop end user courses						
3.5	Implement your office systems education plan						
4.0	**OBTAIN PUBLICATIONS**						
4.1	Identify publications requirements						
4.2	Enter an SLSS subscription						
4.3	Develop a publications update & dist. plan						

IMPLEMENTATION PLANNING CHART

TASK NO.	TASK	PERSON RESPONSIBLE	START DATE	END DATE	SCHEDULE (UNITS=)	DATE TASK COMPLETED	REMARKS
5.0	ORDER SUPPLIES						
5.1	Identify necessary supplies						
5.2	Establish ordering procedures						
6.0	DEVELOP APPLICATIONS PLAN						
6.1	Identify applications						
6.2	Establish applications priorities						
6.3	Design applications						
6.4	Establish cutover plan						
7.0	DEVELOP SYSTEM PLAN						
7.1	Plan hardware installation						
7.2	Plan licensed program product						
7.2.1	Plan profiles						
7.2.2	Plan network layout						
7.3	Plan DB/DC,SNA,and host support environment						
7.4	Plan host code installation						
7.4.1	Plan required host parameters						

IMPLEMENTATION PLANNING CHART

TASK NO.	TASK	PERSON RESPONSIBLE	START DATE	END DATE	SCHEDULE (UNITS=)	DATE TASK COMPLETED	REMARKS
8.0	DEVELOP STANDARDS AND PROCEDURES AND PREPARE MANUALS						
8.1	Establish security standards & procedures						
8.2	Establish naming standards & procedures						
8.3	Establish document format standards and procedures						
8.4	Establish printing standards & procedures						
8.5	Establish document retention standards and procedures						
8.6	Establish archiving standards & procedures						
8.7	Establish backup/ recovery standards and procedures						
8.8	Establish housekeeping standards & procedures						
8.9	Establish communi- cation standards and procedures						
8.10	Establish problem determination & track- ing standards and						
8.11	Establish software maintenance standards and procedures						
8.12	Prepare procedures manuals						

IMPLEMENTATION PLANNING CHART

TASK NO.	TASK	PERSON RESPONSIBLE	START DATE	END DATE	SCHEDULE (UNITS=)	DATE TASK COMPLETED	REMARKS
9.0	PERFORM PHYSICAL INSTALLATION						
9.1	Confirm preparation of the physical environment						
9.2	Schedule delivery						
9.3	Peform physical installation						
10.0	IMPLEMENT SYSTEMS AND APPLICATIONS						
10.1	Install licensed program product						
10.2	Generate text environment						
10.3	Install document distribution and host support environment						
10.4	Install applications on host						
10.5	Create file description						
10.6	Document system parameters						
10.7	Complete hands-on training						
10.8	Implement application plan						

IMPLEMENTATION PLANNING CHART

TASK NO.	TASK	PERSON RESPONSIBLE	START DATE	END DATE	SCHEDULE (UNITS=)															DATE TASK COMPLETED	REMARKS
11.0	PERFORM POST-INSTALLATION ACTIVITIES																				
11.1	Maintain end user support																				
11.2	Plan ongoing education																				
11.3	Evaluate application designs																				
11.4	Evaluate improvement against goals																				
11.5	Evaluate and fine-tune system performance																				
11.6	Refine procedures and update manuals																				
11.7	Update system parameters documentation																				
11.8	Peform ongoing software maintenance																				
11.9	Plan next installations																				

DOCUMENT INFORMATION ON PROJECT TEAM AND IBM SUPPORT PERSONNEL

Enter your selections for the Project Team below. You should also enter the IBM personnel who are supporting your implementation effort.

Project Team

Name	Title	Function	Phone

IBM Support Personnel

PRELIMINARY EDUCATION PLANNING CHART

PROJECT FUNCTION	NAME	IBM OFFICE SYSTEMS CLASSES					SELF-STUDY COURSES				DATE	LOCATION
		A2522	Y2383	S2517	S2544	S2522	SR30-0615	SR30-0484	SR30-0536	SR30-0490		
PROJECT MANAGER												
SYSTEMS IMPLEMENTER												
TEXT IMPLEMENTER												
FILES IMPLEMENTER												
DOCUMENT DIST IMPLEMENTER												
LEAD OPERATOR(S)												

PUBLICATIONS WORKSHEET

TITLE	ORDER* NUMBER	AUDIENCE						QUANTITY REQUIRED
		PM	TA	LO	SI	ER	TS	
INTRODUCTORY AND GENERAL INFORMATION								
IBM 5520 System Introduction	GC23-0702	X	X		X		X	
IBM 5520 Installation Manual-Implementation Planning plus TNL SN20-9671	SC23-0713	X			X		X	
IBM 5520 Planning Considerations and Management	SC23-0716	X	X		X		X	
IBM 5520 Licensed Program Specifications	GC23-0735				X			
IBM 5520 Installation Manual-Licensed Program Installation/Implementation	SC23-0745		X	X	X		X	
IBM 5520 Files Design & Operations Self Study	SR30-0535		X		X		X	
IBM 5520 Display/Device Training Administrator's Guide-Self Study	SR30-0536		X	X			X	
General Information Manual for IBM 6670 Information Distributor	G544-1006	X	X	X			X	
PLANNING AND INSTALLATION								
IBM 5520 Concepts and Facilities	GC23-0707	X	X	X	X		X	
IBM 5520 Planning Considerations and Management	SC23-0716	X	X		X		X	
IBM 5520 Installation Manual-Files Design & Stored Procedures	SC23-0737		X	X	X		X	
TEXT OPERATOR INFORMATION								
IBM 5520 Reference Manual plus TNL SN20-9670	SC23-0704		X	X			X	
IBM 5520 Menu Abbreviations	GX23-0706			X		X	X	
IBM 5520 Operator's Guide	SC23-0715			X		X	X	
IBM 5520 Remote Device Operator's Guide	SC23-0746			X			X	
IBM 5257 Printer Operator's Guide	GA23-1004			X		X	X	
IBM 5258 Printer Operator's Guide	GA23-1005			X		X	X	
5219 Printer Customer Setup Procedure	GA23-1008			X	X		X	
IBM 5219 Printer Operator's Guide	GA23-1009			X		X	X	
IBM 5520 Display/Device Operating Instructions-Self Study	SR30-0484			X		X	X	
IBM 5520 Text Implementation/ Operations-Student Workbook	SR30-0487		X	X			X	

LEGEND

PM = Project Manager
TA = Text/Files/DD Administrator
LO = Lead Operator
SI = Systems Implementer
ER = Entry-Revision Operator
TS = Training Specialist

***NOTE**: All course/publication materials referenced in this Guide are U.S. course/publication numbers. Consult your IBM Representative for course/publication numbers applicable to your country.

PUBLICATIONS WORKSHEET

TITLE	ORDER NUMBER	AUDIENCE						QUANTITY REQUIRED
		PM	TA	LO	SI	ER	TS	
TEXT OPERATOR INFORMATION (CONTINUED)								
IBM 5520 System Operations Self-Study	SR30-0615			X		X	X	
IBM 5520 Files Implementation/ Operations Student Workbook	SR30-0735		X	X			X	
Forms Ruler	SC20-1918			X		X	X	
IBM 6670 Information Distributor Operating Instructions	S544-0574			X		X	X	
LEAD OPERATOR INFORMATION								
Form Design Reference Guide for Printers	GA24-3488		X	X			X	
IBM 5520 Reference Manual plus TNL SN20-9670	SC23-0704			X			X	
IBM 5520 Menu Abbreviations	GX23-0706			X		X	X	
IBM 5520 Operator's Guide	SC23-0715		X	X		X	X	
IBM 5520 Remote Device Operator's Guide	SC23-0746			X		X	X	
IBM 5257 Printer Operator's Guide	GA23-1004			X			X	
IBM 5258 Printer Operator's Guide	GA23-1005			X			X	
IBM 5219 Printer Customer Setup Procedure	GA23-1008			X			X	
IBM 5219 Printer Operator's Guide	GA23-1009			X			X	
IBM 5520 Display/Device Operating Instructions-Self Study	SR30-0484		X	X		X	X	
IBM 5520 System Operations Self-Study	SR30-0615			X		X	X	
IBM 5520 Files Implementation/ Operations- Student Workbook	SR30-0735		X	X			X	
COMMUNICATIONS								
IBM 5520 S/370 Host Attach Programmers Guide	SC23-0710				X			
IBM 5520 Remote Device Operators Guide	SC23-0746			X		X	X	
DIAGNOSIS AND PROBLEM DETERMINATION								
IBM 5525 System Unit Error Analysis Guide	SY20-8509			X				
IBM 5520 Messages and Recovery Aids plus TNL SN20-9667	SC23-0733			X		X	X	
IBM 6670 Information Distributor Codes and Messages for SNA Environment	S544-3003			X	X		X	
IBM 6670 Information Distributor Keyboards and Fonts Catalog	S544-3009		X	X	X		X	

PUBLICATIONS WORKSHEET

TITLE	ORDER NUMBER	AUDIENCE						QUANTITY REQUIRED
		PM	TA	LO	SI	ER	TS	
PHYSICAL PLANNING								
IBM 5520 Installation Manual-Physical Planning	GA23-1002				X		X	
PHYSICAL PLANNING TEMPLATES								
IBM Administrative System (English)	GX23-0703	X					X	
IBM Administrative System (Metric)	GX23-0704	X					X	
MISCELLANEOUS								
The Considerations of Physical Security in a Computer Environment	G520-2700	X	X				X	
The Considerations of Data Security in a Computer Environment	G520-2169	X	X					
Staying in Charge	G505-0058	X	X				X	

PUBLICATIONS WORKSHEET

Use the blank worksheet below for any additional publications you have identified. Enter the title, order number, and audience.

TITLE	ORDER NUMBER	AUDIENCE					QUANTITY REQUIRED
		PM	TA	LO	SI	EU	

APPLICATIONS PLANNING CHART

DEPARTMENT	TEXT APPLICATIONS	FILES APPLICATIONS	DOC. DIST. APPS.	DATE PLANNED	ADD (A) CONVERT (C)*

*For applications which are to be converted, indicate with a "C." For new applications to be implemented, identify as "A."

APPLICATIONS IMPLEMENTATION PLANNER

DEPARTMENT	APPLICATIONS	TESTING DATES		IMPLEMENTATION DATES		REMARKS
		PROJECTED	COMPLETED	PROJECTED	COMPLETED	

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IBM 5520 ADMINISTRATIVE SYSTEM

OFFICE SYSTEMS IMPLEMENTATION

CUSTOMER GUIDE

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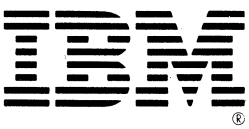

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