



International Information Bulletin for Customers - Installation of IBM Machines

The purpose of this bulletin is to explain IBM terms and describe IBM's global practices associated with the installation of IBM machines¹.

This bulletin is provided for informational purposes only. The sale and installation of IBM machines is governed by the terms and conditions of those transactions, as well as the terms and conditions of the associated products; the information in this bulletin does not alter or modify any such terms and conditions or any other agreement you may have with IBM. In the event of a conflict between specific product installation documentation and this bulletin, the specific product installation documentation will apply for that product.

Part 1: Explanation of IBM Installation Terms

Section 3.3 of the 2012 IBM Customer Agreement² (the "ICA") speaks in part to installation of machines acquired under the ICA. Prior versions of the IBM Customer Agreement had equivalent, if not the same, terms. Machines acquired through an IBM Business Partner should have equivalent installation terms. This document explains these terms in some detail.

1. "You agree to provide an environment meeting the specified requirements for the Machine."

When IBM announces a hardware product³, we specify in that announcement what we refer to as the "Specified Operating Environment", which lists the requirements mentioned in this ICA provision. For instance, an announcement may list some or all of the following:

- power requirements (for example, 220V, 60 amps, etc.),
- proper temperature range (for example, 15C - 25C),
- maximum amount of particles allowed in the air (for example, <= 1000 parts per million of particles greater than 100 microns), and
- flooring requirements (for example, if a raised floor required).

In each hardware product announcement, IBM lists all of the necessary specifications because our warranty for the product will apply only if the machine is operated within all of its

1 Installation practices for IBM System x machines may vary from the explanations in this bulletin. Contact your IBM representative with questions regarding installation of System x machines.

2 For the US version of the ICA, please follow this link:
http://www.ibm.com/businesscenter/cpe/download0/185939/ica_us.pdf For other countries, please contact your IBM representative.

3 IBM product announcements can be found through this link:
http://www.ibm.com/common/ssi/index.wss?request_locale=en



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operating specifications⁴. If the operation of the machine deviates from any of the published specifications, IBM is not obligated to provide service under terms of the warranty. The same is true post-warranty: our hardware maintenance service obligations will apply provided the machine is operated within its published specifications.

2. "IBM has standard installation procedures. IBM will successfully complete these procedures before it considers an IBM Machine (other than a Machine for which you defer installation or a Customer-set-up Machine) installed."

This provision refers only to what IBM refers to as "Installation by IBM" (or "IBI") machines, which are machines that require installation by IBM. IBM establishes this requirement for certain machines because the machine may be heavy, or because the installation may be difficult, requiring special skills and/or special tools. IBM's System z machines ("mainframes") and most other high-end IBM hardware products are IBI machines. Installation of an IBI machine is included in the purchase price of the machine, provided the machine is installed within six months of shipment.

First, for certain types of machines, IBM requires that the customer perform installation planning. In these cases, IBM provides assistance to the customer at no charge, and publishes an installation planning checklist for most IBM hardware products. Currently, IBM requires such installation planning for the first IBM Power System machine installed in a location, and many System z machine installations, as well as other IBM hardware products; customers may contact their IBM representative with questions regarding installation planning requirements for a specific IBM machine.

For each IBI machine, IBM creates specific installation instructions which an IBM System Service Representative ("SSR") is expected to follow. These generally include unpacking the machine, assembling it on the customer's floor, loading machine code, running installation verification diagnostics, and (for Return Part MESs) packing up removed parts and returning those parts back to IBM. These are the "standard installation procedures" that the ICA provision refers to, and they are used for every installation of the particular type of machine.

The provision implies that the installation must be scheduled. The customer and IBM are expected to agree upon a schedule for the installation. Current ICA terms require the machine to be installed within 30 days of shipment. If the customer asks IBM to defer the installation outside of the 30-day window, IBM has the right (as provided in the ICA) to declare the machine to be "installed", which starts the warranty period. If the customer asks IBM to defer the installation beyond six months following shipment, the installation will be billable.

Once IBM begins the installation of a machine, we will "successfully complete" the machine's installation procedures, meaning that IBM will perform all of our standard installation tasks for

⁴ IBM's Statement of Limited Warranty can be found through this link:
http://www.ibm.com/systems/support/machine_warranties/



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that type of machine, and then verify that the machine is functioning properly. If, during the course of the installation verification, IBM finds that the machine is not functioning properly, IBM will resolve this issue. Once the installation verification has completed successfully, IBM "turns the machine over" to the customer for their use. A different section of the ICA specifies that the "Date of Installation" for a machine is the business day after IBM completes the machine's installation (unless installation is deferred), and the machine's warranty period begins on this Date of Installation.

It is important to mention a few items that are NOT included in IBM's installation procedures:

- attaching external cables to the machine (such as cables which link the machine to another device),
- customizing the machine's operational settings,
- loading program products (such as an operating system) onto the machine, and
- installation of non-IBM products.

The above non-included items are customer responsibilities. For further detail regarding tasks that are included and not included as part of IBM machine installation, please refer to Part 2 of this bulletin.

3. "You are responsible for installing a Customer-set-up Machine and, unless IBM specifies otherwise, a non-IBM Machine."

For small, generally easy to install machines, IBM generally expects the customer to perform the installation, and provides instructions to guide the proper installation of the machine. IBM refers to these machines as "Customer Set-Up" (or "CSU") machines. In each product's announcement letter, and on the purchase contract document used for direct sales by IBM (generally referred to as the "Purchase Supplement"), IBM specifies if the machine is CSU. If the customer wants IBM to install a CSU machine, that installation will be billable.

Sometimes, IBM sells non-IBM machines under the ICA. As this provision states, the customer is responsible for installing non-IBM machines unless IBM specifies otherwise. Such IBM specification would be made in an IBM announcement letter, in a purchase contract pertaining to the non-IBM machine, or both.

Each machine designated as CSU is contractually deemed to be installed on the second business day following IBM's standard transit allowance period for the machine, regardless of when or whether the machine is actually installed. In the US for all machines the standard transit allowance period is currently six calendar days. The standard transit allowance for other geographies may vary – IBM will provide it upon request. The significance of this effective installation date is that the machine's warranty begins on that date, unless the machine is acquired through an IBM Business Partner and a different warranty start date is specified by the IBM Business Partner.



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If the customer would like IBM to install a CSU machine, the customer should contact their IBM representative with that request. IBM will prepare a service contract for the installation, and following signature of the contract, IBM will perform the installation at a mutually agreed upon time.

Should problems be encountered during the customer's installation of a CSU machine, or if questions should arise regarding the installation, the contact information included in the machine's installation instructions should be referred to.

4. Delayed Installation of IBI Machines

Under terms of the ICA, an IBI Machine (and an IBI MES⁵) acquired directly from IBM is required to be installed within 30 days following shipment; under prior versions of the IBM Customer Agreement, this 30-day requirement applied only to IBI MES installations. If an IBI Machine or IBI MES (acquired under any version of the ICA) is not installed within 30 days, IBM has the right to (i) declare that the machine/MES was installed as of the date IBM was reasonably prepared to perform the installation, and thus initiate the Machine's warranty period, or (ii) for an IBI MES, cancel the transaction and take back the MES at customer's expense (to cover transportation and any necessary rework charges). Further, if an IBI Machine or IBI MES (regardless of sales channel or sales contract terms) is not installed within six months following shipment, installation of the machine/MES by IBM is subject to an charge under standard IBM service terms.

Part 2: Description of IBM Installation Practices

Many IBM installation practices vary by IBM product line. The following descriptions of IBM installation practices are provided as a general explanation, with product line-specific practices noted. These IBM installation practices apply only to IBM machines and MESs designated as requiring installation by IBM.

1. Installation Scheduling Process

IBM will generally work out a mutually agreeable installation schedule with our customer. This is usually handled by the IBM SSR.

2. Standard Installation Times

IBM will generally perform installations during normal business hours, as locally determined by IBM. IBM will also perform installations during off-shift (including weekend) hours when

⁵ MES, or Miscellaneous Equipment Specification, is IBM's term to describe a change to an installed machine, such as an upgrade or conversion.



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reasonably required due to the nature of the customer's operation and the impact the installation will have on the customer's operations.

3. Standard Installation Activities

Installation by IBM includes many activities as part of the installation service. This section provides detail that generally applies to all IBI machines, not only of what is included, but also what is not included. Customers may contact their IBM representative with questions regarding installation of a specific IBM machine.

3.1 Activities Included with IBM Installation

Standard installation of machines by IBM includes many activities such as:

- installation planning assistance,
- unpacking the new machine, and disposing of packing materials,
- minor re-positioning of the new machine,
- removing cables from a replaced machine, transferring cables and other inter-machine connections from a replaced machine to the new machine,
- minor movement of a replaced machine,
- deinstallation of a replaced machine,
- packing and return shipment to IBM of removed parts (including old frames) associated with MES installations,
- making internal machine connections,
- installation of machine code (also referred to as "licensed internal code" or "LIC" for System z) provided with the machine,
- installation, as deemed necessary for the installation by IBM, of prerequisite and corequisite machine code fixes, updates and patches (not applicable to (i) certain machines – contact IBM for specific machine treatment -- and (ii) MES installations where the base machine is not serviced by IBM under warranty or post-warranty IBM maintenance service contract),
- for System z only, read and connect to server customer-laid device cables,
- for System z only, loading of customer-generated Input/Output Configuration Data Set (IOCDs),
- verification of machine functionality.

3.2 Activities Not Included with IBM Installation

The standard installation of machines by IBM does not include any of the following activities:

- installation of proper electrical hook-up,
- installation of required ducts and other air cooling components, plumbing and other water cooling components, or both,



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- moving of the machine from the customer's loading dock to the desired installation location,
- relocation of the new machine (other than minor re-positioning),
- relocation, packing, or both of another machine, including a replaced machine,
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- installation of new or additional cables,
- laying and connecting external device cables to the machine (other than as specified above for System z),
- rearranging or reconfiguring machine components, such as I/O cards, drawer hardware, etc.,
- for certain products, installation of prerequisite and corequisite machine code fixes, updates and patches (contact IBM regarding specific machine treatment),
- installation of prerequisite and co-requisite program (for example, operating system, middleware, etc.) fixes, updates and patches,
- operational set-up of machine (for example, configuring LPARs, profiles, configuration parameters, etc.),
- network implementation and configuration,
- installation of software other than machine code (for example, programs included as part of a solution),
- resolution of issues caused by machine interaction with devices that IBM does not service or support.

IBM provides billable services which can perform many of the activities that are not included as part of the standard installation of an IBI machine.

4. MES Installations on Base Machines Not Serviced by IBM

For IBI MES installations on a base machine not serviced by IBM (that is, for a base machine that is out of warranty and is not under IBM maintenance service contract), there are special installation considerations. Details of these considerations can be found in IBM's "International Customer Bulletin for Customers – Miscellaneous Equipment Specifications (MESs)"⁶. The following is a brief summary of these considerations:

- only IBM should install an IBI MES; among other reasons, this is required for the MES to qualify for its applicable IBM warranty,
- it is the customer's responsibility to ensure that the base machine is in good working order and has all prerequisite and co-requisite levels of machine code installed.

During the course of an IBI MES installation on a base machine not serviced by IBM, if IBM discovers that the base machine is not in good working order, does not have all required

⁶ The "International Customer Bulletin for Customers – Miscellaneous Equipment Specifications (MESs)" is available through this link: <http://www.ibm.com/support/docview.wss?uid=pub1g126526500>



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levels of machine code, or is otherwise defective, IBM will stop the MES installation activity and notify the customer of the defect. The customer may then either (i) contract with IBM to remedy the defect through a billable service contract, then resume the MES installation, or (ii) reschedule the MES installation for a time following the customer's resolution of the defect. In such instances of a base machine defect, IBM's country-specific billing practices will be followed, meaning that IBM's time spent on the installation up until the defect discovery may be billable.

5. Successful Installation Process

Once IBM completes the installation of a machine and verifies that the machine is functioning properly, IBM will turn the machine over to the customer for the customer's use (which includes implementation configuration). For an MES installation that requires an outage of the base machine, IBM will verify that the MES has been properly installed and that the machine is functioning properly before turning the upgraded machine over to the customer for the customer's use.

5. Unsuccessful Installation Process

Should IBM's verification process indicate that the machine is not functioning properly, IBM will resolve the problem, verify that the machine is functioning properly, and then turn the machine over to the customer for the customer's use. IBM will not turn the machine over to the customer until IBM verifies that the machine is functioning properly.

6. Frame-Roll MES Considerations

Many IBM MESs are characterized as "frame-roll" or "push/pull" installations. For these MES installations, the customer is not authorized to make use of both the original machine and the upgraded machine simultaneously unless IBM specifies otherwise. As such, the customer will not be able to make use of the original machine upon commencement of the MES installation; the customer will be able to make use of the upgraded machine following IBM's successful installation of the MES (which includes deinstallation of the original machine).