

Document details

Doc Organization: Solution Assurance

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Overview

This information is to help determine if an Expert Pre-sale and/or Pre-install Technical and Delivery Assessment (TDA) is mandatory.

More details

Explanation of Requirements and Tables:

The below tables represent products and opportunities requiring the completion of a **expert level** Technical and Delivery Assessment (TDA). These Solution Assurance requirements are **mandatory** and define the Worldwide (WW) minimum criteria that must be followed by IBM and IBM Business Partner Sales Teams. TDAs are not required for Enterprise License Agreement (ELA) or renewal/expansion of products previously purchased by the client.

TDA Clip Levels are ACV (Annual Contract Value) for any SaaS transactions and TCV (Total Contract Value) for all other transaction types. All clip levels are shown in US Dollars. "\$0K or ALL" in the clip level field indicates that a Expert level TDA is required for **all** opportunities regardless of contract value.

IBMers:

Each IBM geography may:

- 1) Add (not remove) products to these tables,
- 2) Lower (not raise) the WW defined clip levels and/or
- 3) Put in place a Total TCV (Total Contract Value) or ACV (Annual Contract Value) country or geo clip level.

Although we have listed known geo-specific product requirements on this page, the IBM Sales Teams must also refer to their local geography's Solution Assurance page for the most current local business rules. These local business rules apply to IBM direct deals only. They do not apply to Business Partner opportunities.

Make sure you check the following page for your geo:

<http://w3.ibm.com/support/assure/assur30i.nsf/Web/TDAwhen>

Checklists:

Every review requires the completion of the IBM developed Checklist listed in the **SA Page #** column.

If a product-specific Checklist is available, you must complete that checklist. These Checklists can be found in the Solution Assurance Library at:

IBM: <http://w3.ibm.com/support/assure/assur30i.nsf/Web/Guides>

PartnerWorld/BP: <https://www.ibm.com/partnerworld/solution-assurance/overview>

If a product-specific Checklist is **not** available, you must complete the **Software Solution Checklist** or the **SaaS Solution Checklist** found at the following sites:

IBM (Software Solution Checklist):

<http://w3.ibm.com/support/assure/assur30i.nsf/WebIndex/SA479>

IBM (SaaS Solution Checklist):

<http://w3.ibm.com/support/assure/assur30i.nsf/WebIndex/SA1065>

PartnerWorld/BP (Software Solution Checklist):

<https://www.ibm.com/partnerworld/solution-assurance/SA479>

PartnerWorld/BP (SaaS Solution Checklist): <https://www.ibm.com/partnerworld/solution-assurance/SA1065>

IBM Cloud					
Non-SaaS					
	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	All non-SaaS Products and Solutions		Not mandatory, however, the decision to conduct a expert level TDA is based on the sales and technical team determining that one is warranted. Examples include first of a kind in a	SSA \$150K Mexico \$250K Brazil \$350K	IBM: SA479 BP: SA479

client or multiple
product solutions.

Data & AI

	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	Planning Analytics Local (5737-B03)	SW/CGPF	\$100K - Peer TDA Required		IBM: SA479 BP: SA479
	IBM Big SQL (BSQL) (5737-E74)	SW/BSQL	\$500K - Peer TDA Required \$1M - Expert TDA Required		IBM: SA479 BP: SA479
	Cognos: BI: Dashboarding	SW/CBDB	\$100K - Expert TDA Required		IBM: SA479 BP: SA479
	Cognos: BI: Enterprise BI (e.g., BI, Standardization, BICC)	SW/CBEB			
	Cognos: BI: Query and Reporting	SW/CBI			
	Data Science Local DSLO (5737-D37)	SW/DSLO			
	Unified Governance MVP UMVP	SW/UMVP	\$150K - Expert TDA Required		IBM: SA479 BP: SA479
	Unified Governance & Integration Platform	SW/UNGVP	\$200K - Expert TDA Required		IBM: SA479 BP: SA479
	DB2 Event Store (5737-E53)	SW/BLSP	\$350K - Expert TDA Required		IBM: SA479 BP: SA479
	DB2 Purescale	SW/PURE	\$500K - Expert TDA Required		IBM: SA479 BP: SA479
	DB2 for SAP	SW/DBSAP	\$1M - Expert TDA Required		IBM: SA479 BP: SA479

	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	Integrated Analytics Environment (5737-B67)	SW/IIAE	\$0K See instructions below		See instructions below
	Bluemix Lift	SW/BLLI	\$100K		See instructions below
	Cognos Analytics on Cloud (5725-U84)	SW/SBIS	See instructions below		
	Controller on Cloud (5725-S70) (FOPM)	SW/FPMCS			
	DataStage on Cloud	SW/DSOC			
	DB2 Analytics Accelerator Cloud (5737-B49)	SW/DAAC			
	Db2 on Cloud (formerly dashDB for Transactions) (5737-C74)	SW/DAST			
	DB2 Warehouse on Cloud (formerly dashDB for Analytics) (5725-U38)	SW/DHDB			
	IBM Planning Analytics (5725-M51)	SW/CGPFS			
	Info Serv on Cloud (5737-A95)	SW/ISOC			
	Informix on Cloud (5737-B86, 5737-B60)	SW/IXCL			
	Master Data Management Collaborative Edition on Cloud	SW/MDMCE			
	Master Data Management on	SW/MDMC			

Cloud (5737-A15)				
Watson Explorer Subscription (5725-I17)	SW/WEXSU			
Db2 Hosted (formerly CDS Hosted DB2 on Cloud) (5725-W92)	SW/HDBC	\$500K See instructions below	See instructions below	
Instructions: 1) Determine the TDA Review Type needed by completing the Review Type Questionnaire on SA1067. There are three review types: Self, Peer and Expert. 2) If a Self review is necessary, complete the Self Peer Checklist for Software Opportunities on SA552 and store in the SalesConnect opportunity. 3) If a Peer review is necessary, complete the Self Peer Checklist for Software Opportunities on SA552 and complete the Analytics Review Template on SA1067. Next, engage a peer to perform the review. Store the artifacts and TDA results in the SalesConnect opportunity. 4) If a Expert level TDA is <u>required</u> , complete the SaaS Solution Checklist on SA1065 and the Analytics Review Template on SA1067. Next, request the expert level review. IBM: To request a TDA . Engage your local Solution Assurance Quality Practitioner (QP) to conduct the expert level review. The QP must store the artifacts and TDA results in QA Work Bench (QAWB). BPs: Engage the appropriate organization in your business. Store results in the SalesConnect opportunity.				
Links IBMers: SA552 SA1065 SA1067 Business Partner: SA552 SA1065 SA1067				

North America Internal Only					
	Product Description	Product Code	Pre-sale TDA Clip Level (NA)		SA Page #
	SPSS Modeler with Scoring Adapter for zEnterprise (5655-AA8, 5655-SP7)	SW/PAMSA	\$100K	Peer TDA Required using SPSS Enterprise Architect as SME	IBM: SA479 BP: SA479
	SPSS Analytic Server & Catalyst	SW/PAAS			IBM: SA479 BP: SA479
	SPSS Collaboration & Deployment Services (5725-A72)	SW/PACD	\$200K		IBM: SA479 BP: SA479

	SPSS Modeler (5725-A64, 5725-A65)	SW/PAMOD	IBM: SA479 BP: SA479
	SPSS Modeler (Loz)	SW/PAMODZ	IBM: SA479 BP: SA479
	SPSS Statistics (5725-A54)	SW/PASTA	IBM: SA479 BP: SA479
	SPSS Statistics (Loz)	SW/PASTZ	IBM: SA479 BP: SA479

Cloud Integration

	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	IBM MQ on IBM Cloud (5900-A0Y)	SW/IMQIC	\$100K - Expert TDA Required		IBM: SA479 BP: SA479
	Runbook Automation (SaaS) (5725-Y61, 5725-Z25)	SW/RNBK			
	SmartCloud for zLinux	SW/SCZLN			
	Application Diagnostics (5725-K40)	SW/APDIA	\$150K - Expert TDA Required		IBM: SA479 BP: SA479
	Application Performance Management (5725-V19, 5725-M99)	SW/APMCL			
	Application Performance Management Advanced (5725-V20)	SW/APMAD			
	SmartCloud Control Desk (5724-E24)	SW/SCCD			

	API Connect (5725-Z22)	SW/CI-API	\$200K - Expert TDA Required	IBM: SA479
	API Connect for Z	SW/APIMZ		BP: SA479
	Agile Lifecycle Manager (5737-E91)	SW/AGLM	\$250K - Expert TDA Required	IBM: SA479
	IBM DataPower Gateway (5725-T06)	SW/IDG		BP: SA479
	IBM DataPower Gateway Virtual Edition (5725-T09)	SW/IDGVE		
	Netcool IPC / Proviso (5724-P55)	SW/MMTCM		
	Netcool Operations Insight (5725-Q09)	SW/INOI		
	Netcool / OMNIbus (5724-S44)	SW/MMUSE		
	Operations Analytics aka Smart Cloud Analytics Log Analysis, Smart Cloud Analytics Predictive Insights (5725-K26)	SW/SCPRE		
	Rational Software Architect Design Manager (Wz) (5725-A30)	SW/RSADM		
	IBM Cloud Orchestrator (formerly SmartCloud Orchestrator) (5725-H28)	SW/SCORC		
	Tivoli Netcool Network Management (5724-W11)	SW/TONM		
	Tivoli Netcool Performance Manager (5724-W86)	SW/TNPM		
	IBM Voice Gateway (5737-D52)	SW/IBMVG	\$300K - Expert TDA Required	

	WebSphere eXtreme Scale (5724-X67)	SW/WXS			IBM: SA479 BP: SA479
	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	Alert Notification (SaaS) (5725-Y73 , 5725-Z24)	SW/ALERT	\$200K See instructions below		See instructions below
	API Connect SaaS (5725-Z63)	SW/APMS			
	App Server SaaS (5725-Y14)	SW/ASCLD			
	AppConnect (5725-Z44, 5737-E34)	SW/APPCT			
	AppConnect Professional on Cloud aka App Connect Professional (IBM Cloud) (5737-B81, 5737-B82)	W/ACPRC			
	Application Performance Management (SaaS) (5725-M99)	SW/APMSS			
	Aspera SaaS (5900-A2B)	SW/ASPC			
	Blueworks Live (5725-U03, 5725-G68)	SW/BLUEL			
	Business Process Management for Hybrid Entitlement	SW/BPMHE			
	Business Process Manager Cloud (5725-S94, 5725-L63)	SW/BPMCL			
	Business Rules for IBM Cloud (5725-T17)	SW/BRBLM			

Cloud Event Management (5900-A1M, 5900-A13)	SW/CLEVM
Datacap on Cloud (5725-Z39)	SW/DTCPC
IBM Digital Business Assistant (SaaS)	SW/IDBAS
Integration Bus on Cloud aka App Connection Enterprise (5724-J05, 5725-Y09)	SW/IBOCS
Operational Decision Manager on Cloud (SaaS) (5737-A28, 5725-W47)	SW/ODMOC
PureApp Service Infrastructure SaaS (5725-R72)	SW/PASIS
SmartCloud Control Desk SaaS (5724-E25)	SW/SCCDS
UrbanCode Deploy on Cloud (5900-A0P)	SW/UDPLC
Workload Automation (SaaS) (5725-P65)	SW/WKASA
Instructions: 1) Determine the TDA Review Type needed by completing the Review Type Questionnaire on SA1067. There are three review types: Self, Peer and Expert. 2) If a Self review is necessary, complete the Self Peer Checklist for Software Opportunities on SA552 and store in the SalesConnect opportunity. 3) If a Peer review is necessary, complete the Self Peer Checklist for Software Opportunities on SA552 and complete the Analytics Review Template on SA1067. Next, engage a peer to perform the review. Store the artifacts and TDA results in the SalesConnect opportunity. 4) If a Expert level TDA is <u>required</u> , complete the SaaS Solution Checklist on SA1065 and the Analytics Review Template on SA1067. Next, request the expert level review. IBM: To request a TDA . Engage your local Solution Assurance Quality Practitioner (QP) to conduct the expert level review. The QP must store the artifacts and TDA results in QA Work Bench (QAWB). BPs: Engage the appropriate organization in your business. Store results in the	

	SalesConnect opportunity. Links IBMers: SA552 SA1065 SA1067 Business Partner: SA552 SA1065 SA1067				
	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	IBM Cloud private (Hybrid Management) (5737-E67)	SW/ICPP	Follow instructions on SA1070 to determine level of review for all deals \$0K		IBM: SA1070 BP: SA1070
Cloud Platform					
	No TDA / Solution Assurance reviews are required, managers can request them as needed. Use the Solution HUB process for deals over \$1M				
Watson Customer Engagement					
eCommerce & Merchandising	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	WebSphere Commerce (5724-I36, 5724-I37, 5724-I38, 5724-I39, 5724-I40, 5724-I41) when sold with Sterling CPQ (5725-D11)	SW/SCPQ - OCOM/UNK	\$2M		IBM: SA479 BP: SA479
	WebSphere Commerce Managed Hosted (5737-D98)	COMN/WCH	\$500K		IBM: SA479 BP: SA479 Hosting Assessment

					must be completed
Marketing	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	IBM Interact (5725-D22)	SW/UNI	\$1M		IBM: SA479 BP: SA479
	IBM Interact (with Advance Patterns) (5725-D22)	SW/UNI	\$500K		IBM: SA479 BP: SA479
	IBM Interact (with IBM Analytics/PCI)	SW/UNI	\$500K		IBM: SA479 BP: SA479
	IBM Campaign sold with Watson Campaign Automation (5725-D22 and 5725-S87 or 5725-V28 or 5725-W69)	SW/UNC - SW/MCLO	\$500K		IBM: SA479 BP: SA479 Volume Assessment must be completed
	Contact Optimization (formerly IBM Optimize) (5725-D22)	SW/UNOPT	\$500K		IBM: SA479 BP: SA479
B2B Integration / Supply Chain	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	B2B Gateway Pack (5737-C19)	SW/B2BGP	\$500K For any		IBM: SA479 BP: SA479

	B2B Integrator (5725-D06)	SW/SI	combination of the B2B Integration product set (Brand Code SIS).	IBM: SA479 BP: SA479	
	Connect: Direct (5725-C99)	SIS/CDT		IBM: SA479 BP: SA479	
	Connect: Direct z/OS (5655-X01, 5655-X09)	SW/SCDZ		IBM: SA479 BP: SA479	
	Control Center (5725-D02)	SW/SCCMF		IBM: SA479 BP: SA479	
	File Gateway (5725-D07)	SW/SFGL		IBM: SA479 BP: SA479	
	Gentran for z/OS (5655-ST7, 5655-X07)	SW/SGTZ		IBM: SA479 BP: SA479	
	Global Mailbox	SIS/GMX		IBM: SA479 BP: SA479	
	IBM Transformation Extender (5724-Q23, 5655-R99)	SW/WTX		IBM: SA479 BP: SA479	
	IBM Transformation Extender for Linux on Z	SW/WTXZL		IBM: SA479 BP: SA479	
	IBM Transformation Extender z/OS (5655-Q35, 5655-R95, 5655-R99)	SW/WTX39		IBM: SA479 BP: SA479	
	Sterling Business to Business Integrator (SB2Bi) Linux Syst z	SW/SB2BI	IBM: SA479 BP: SA479		
Security Systems	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level	SA Page #

				(IBM Direct Only)	
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Note: A Pre-sale TDA is REQUIRED when the Clip level is met. Clip level is based on the total value of the product family.

Keep in mind this value can be calculated with one or more product codes in that family.

Data Encryption (Guardium) = \$500K

Multi-Cloud Data Encryption (MDE) (5737-C67)	SW/GMDE	IBM: SA1066 BP: SA1066
Security Guardium Data Encryption (GDE) (5724-R38)	SW/IGEED	IBM: SA1066 BP: SA1066
Guardium Data Encryption for Z (for DB2 & IMS) (5655-P03)	SW/EZDI	IBM: SA1066 BP: SA1066

Watson for CyberSecurity = \$250K

QRadar Advisor (5737-D17)	SW/WFCS	IBM: SA479 BP: SA479
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QRadar on Cloud = \$600K

QRadar on Cloud - New Customer (5725-U83)	SW/QRSAS	IBM: SA479 BP: SA479
QRadar on Cloud (QROC) (5725-U83)	SW/QROC	IBM: SA479 BP: SA479

Data Protection on Cloud = \$600K

IBM Cloud Data Protection	SW/GMSV	IBM: SA479 BP: SA479
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Resilient on Cloud = \$1M

Resilient Incident Response Platform (Cloud) (5737-A52)	SW/RIRPC	IBM: SA479 BP: SA479
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Resilient = \$1M

Resilient Incident Response Platform (5737-A52)	SW/RIRP	IBM: SA479 BP: SA479
Resilient Incident Response Platform for Z (5737-A52)	SW/RIPZ	IBM: SA479 BP: SA479

QRadar = \$600k

QRadar Log Manager - New Deployment	SW/QRLMA	IBM: SA479 BP: SA479
Distributed - New Deployment	SW/QRSA	IBM: SA479 BP: SA479
QRadar Log Manager for Z - New Deployment	SW/QRLMZ	IBM: SA479 BP: SA479
PCAP - New Deployment	SW/QRPC	IBM: SA479 BP: SA479
Incident Forensics - New Deployment	SW/QRIFA	IBM: SA479 BP: SA479
1 - 1 HW Refresh	SW/QHWR	IBM: SA479 BP: SA479
QRadar SW Only - New Deployment	SW/QRPCS	IBM: SA479 BP: SA479
z-Parts - New Deployment	SW/TSCZL	IBM: SA479 BP: SA479
Incident Forensics for Z - New Deployment	SW/QRIFZ	IBM: SA479

		BP: SA479
All in One - New Deployment	SW/QAIO	IBM: SA479
		BP: SA479
Workstation Z - New Deployment	SW/TSCWZ	IBM: SA479
		BP: SA479
Key Lifecycle Management = \$250k		
Key Lifecycle Manager - z/OS (5698-B35)	SW/TKLMZ	IBM: SA479
		BP: SA479
Key Lifecycle Manager (5724-T60)	SW/TKLM	IBM: SA479
		BP: SA479
Trusteer Fraud Protection = \$500k		
Pinpoint Detect Std - Business (5725-R89)	SW/TRPB	IBM: SA479
		BP: SA479
Pinpoint Detect Std - Retail (5725-R89)	SW/TRPR	IBM: SA479
		BP: SA479
Rapport - Retail (5725-R89)	SW/TRRR	IBM: SA479
		BP: SA479
Rapport - Business (5725-R89)	SW/TRRB	IBM: SA479
		BP: SA479
Mobile SDK - Retail (5737-F73, 5725-R89)	SW/TMBR	IBM: SA479
		BP: SA479
Mobile SDK - Business (5737-F73, 5725-R89)	SW/TMBB	IBM: SA479
		BP: SA479

Pinpoint Detect Premium - Retail (5725-R89)	SW/TRPP	IBM: SA479 BP: SA479
Pinpoint Malware Detect - Retail (5725-R89)	SW/TMDR	IBM: SA479 BP: SA479
Pinpoint Detect Premium - Business (5725-R89)	SW/TRP2	IBM: SA479 BP: SA479
Pinpoint Malware Detect - Business (5725-R89)	SW/TMDB	IBM: SA479 BP: SA479
Pinpoint Criminal Detect - Retail (5725-R89)	SW/TCDR	IBM: SA479 BP: SA479
Trusteer Rapport (5725-R89)	SW/TRRP	IBM: SA479 BP: SA479
Pinpoint Criminal Detect - Business (5725-R89)	SW/TPCD	IBM: SA479 BP: SA479
Trusteer Pinpoint (5725-R89)	SW/TRPT	IBM: SA479 BP: SA479
Trusteer Mobile SDK (5737-F73)	SW/TRMS	IBM: SA479 BP: SA479

Access Management = \$400k

Security Access Manager for Enterprise Single Sign-On (5724-V67)	SW/AMESS	IBM: SA479 BP: SA479
Security Access Manager Appliances (5725-V89)	SW/SAMPA	IBM: SA479

		BP: SA479
Security Access Manager (5724-C87)	SW/SAMV	IBM: SA479
		BP: SA479
Security Access Manager for Z	SW/SAMVZ	IBM: SA479
		BP: SA479
Security Directory Suite (5725-Y17)	SW/DSERV	IBM: SA479
		BP: SA479
Security Access Manager for DataPower Appliances (5725-T11)	SW/SAMDP	IBM: SA479
		BP: SA479
Access Manager for DataPower for Z	SW/SAMDZ	IBM: SA479
		BP: SA479
Access Manager for DataPower SW	SW/SAMVE	IBM: SA479
		BP: SA479

Data Protection = \$400k

Guardium Data Protection	SW/GMAM	IBM: SA1066
		BP: SA1066
DB Vulnerability Assessment - Z/OS	SW/GMVAZ	IBM: SA1066
		BP: SA1066
Guardium Data Protection for WkstnZ	GM/WZ	IBM: SA1066
		BP: SA1066
Guardium Data Protection for z/OS	SW/GMAMZ	IBM: SA1066
		BP: SA1066

Guardium Data Protection for zLinux	SW/GMAML	IBM: SA1066 BP: SA1066
Guardium File Activity Monitor	SW/GFAM	IBM: SA1066 BP: SA1066
Data Risk Manager (Agile 3) (5737-F28)	SW/DRMA	IBM: SA1066 BP: SA1066
DB Vulnerability Assessment (5725-II2)	SW/GMVAL	IBM: SA1066 BP: SA1066
Security Guardium Big Data Intelligence (5737-F29)	SW/GBDI	IBM: SA1066 BP: SA1066
Data Risk Manager (Agile 3) for z/OS	SW/DRMZ	IBM: SA1066 BP: SA1066
Guardium Big Data Intelligence for z/OS	SW/GBDIZ	IBM: SA1066 BP: SA1066

Identity Governance & Administration = \$400k

Security Identity Manager (5724-C34)	TIV/ID	IBM: SA479 BP: SA479
Identity and Access Management Bundle	SW/TIAM	IBM: SA479 BP: SA479
Security Privileged Identity Manager (5725-H30)	SW/SPIM	IBM: SA479 BP: SA479
Identity Governance & Intelligence (5725-T18)	SW/IGI	IBM: SA479

Identity Governance & Intelligence for Z	SW/IGIZ	BP:
		SA479
		IBM:
		SA479
		BP:
		SA479
IBM Z Security = \$400k		
zSecure Alert (5655-N21)	SW/ZALRT	IBM:
		SA479
		BP:
		SA479
Multi-Factor Authentication for z/OS (5655-162)	SW/ZMFA	IBM:
		SA479
		BP:
		SA479
Identity & Access Management on Cloud = ALL		
Cloud Identity Connect (5725-X36)	SW/IDAS	IBM:
		SA479
		BP:
		SA479
Cloud Identity Govern (5725-X36 PN D1XDSLL)	SW/RJJ22	IBM:
		SA479
		BP:
		SA479
Cloud Identity Service (5725-Y78)	SW/CISC	IBM:
		SA479
		BP:
		SA479
Cloud Identity Verify (5725-X36)	SW/CIDV	IBM:
		SA479
		BP:
		SA479
i2 Intelligence = \$500K		
i2 Analyst's Notebook (5725-G07)	SW/ANB	IBM:
		SA479
		BP:
		SA479
i2 iBase (5725-G15)	SW/IBASE	IBM:
		SA479
		BP:
		SA479
i2 Enterprise Insights Analysis (5725-G23)	SW/EIA	IBM:
		SA479

			BP: SA479
i2 Analyst's Notebook Premium (5725-G21)	SW/IANP		IBM: SA479 BP: SA479
i2 Analyze (5725-G220)	SW/IIAP		IBM: SA479 BP: SA479
Analyst's Notebook (5725-G07)	SW/ANNB		IBM: SA479 BP: SA479
i2 Enterprise Insight Analysis for Z (5725-G23)	SW/EIACZ		IBM: SA479 BP: SA479

IBM Cloud Pak for Security = \$1M

IBM Cloud Pak for Security (5737-L74)	SW/ICPS		IBM: SA479 BP: SA479
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All Other Security SaaS Offerings

All Other Security SaaS Offerings	Not Required	Europe: \$200K ACV of SaaS revenue component in a single deal	IBM: SA1065 BP: SA1065
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Social	Product Description	Product Code	Pre-sale TDA Clip Level (NA, Europe and Japan)	Pre-sale TDA Clip Level (AP, GCG, LA and MEA)	SA Page #
	Connections (5724-S68)	SW/LCON	\$100K	\$50K	IBM: SA878 BP: SA878
	Connections Cloud (recommended only for hybrid environment installations) (5725-F82)	SW/LLOTH	ALL	\$0K	IBM: SA950 BP: SA950

	Content Accelerator / Web Content Mgmt (5724-I29)	SW/APTRX	\$100K	\$50K	IBM: SA479 BP: SA479
	Forms (5725-J92)	SW/LWFS DCHB/FBD	\$100K	\$50K	IBM: SA479 BP: SA479
	Notes / Domino (ONLY IF MIGRATION FROM COMPETITOR) (5724-Z08)	SW/NOTOT SW/NOTCL SW/NOTSV	ALL	\$0K	IBM: SA974 BP: SA974
	Portal, Mobile Portal	SW/WPEN	\$100K	\$50K	IBM: SA479 BP: SA479
	Sametime (5725-M34, 5725-M35, 5725-M36)	SW/SAMTM	\$100K	\$50K	IBM: SA895 BP: SA895
	Sametime Unified Telephony (5724-U70)	SW/LSUT	\$100K	\$50K	IBM: SA931 BP: SA931
	All SaaS Offerings		Europe (IBM Direct Only): \$200K ACV of SaaS revenue component in a single deal	Not Required	IBM: SA1065 BP: SA1065
Watson IoT	Product Description	Product Code	Pre-sale TDA Clip Level (NA, Europe and Japan)	Pre-sale TDA Clip Level (AP, GCG, LA and MEA)	SA Page #
	Collaborative Lifecycle Management (CLM) (5725-F21)	SW/CLM SW/CLMWZ SW/CLMP	\$100K	\$50K	IBM: SA479 BP: SA479
	Rational Quality Manager (Wz) (5724-V10)	SW/RQMWZ	\$100K	\$50K	IBM: SA479 BP: SA479

	Rational Quality Manager Cloud (5725-X87)	SW/RQMCL	\$100K	\$50K	IBM: SA479 BP: SA479
	Rational Quality Manager Express	SW/RQME	\$100K	\$50K	IBM: SA479 BP: SA479
	Rational Quality Manager Standard	SW/RQM	\$100K	\$50K	IBM: SA479 BP: SA479
	Rational Team Concert (5724-V04)	SW/RTCE	\$100K	\$50K	IBM: SA479 BP: SA479
SaaS	All SaaS Offerings		Europe (IBM Direct Only): \$200K ACV of SaaS revenue component in a single deal	Not Required	IBM: SA1065 BP: SA1065
Watson	Product Description	Product Code	Pre-sale TDA Clip Level (Worldwide)	Geo-specific Pre-sale TDA Clip Level (IBM Direct Only)	SA Page #
	All Products and Solutions		\$750K		IBM: SA479 BP: SA479
	All SaaS Offerings		Not Required	Europe: \$200K ACV of SaaS revenue component in a single deal	IBM: SA1065 BP: SA1065
Other z Software	Product Description	Product Code	Pre-sale TDA Clip Level (NA, Europe and Japan)	Pre-sale TDA Clip Level (AP, GCG, LA and MEA)	SA Page #

	IBM Operations Analytics for z Systems (5698-ABH)	SW/OPANZ	\$100K	\$100K	IBM: SA479 BP: SA479
	OMEGAMON Performance Management Suite for z/OS (5698-AA8)	SW/OMPMZ	\$0K	\$0K	IBM: SA479 BP: SA479
	Rational Team Concert for z (RTCz)	SW/RTCZ	\$100K	\$50K	IBM: SA479 BP: SA479
	Rational Development and Test Environment for System z (RD&T) (5725-G39)	SW/RDT	\$250K	\$75K	IBM: SA479 BP: SA479
	RDz (5724-T07)		\$50K	\$50K	IBM: SA479 BP: SA479

Geo Abbreviations

AP = Asia Pacific

GCG = Greater China Group

LA = Latin America

MEA = Middle East Africa

NA = North America

ALL = All opportunities regardless of contract value

Not Required = Expert level TDA is not required, unless there is an internal IBM local business rule

Required ALL = Required for ALL opportunities

Change Logs

Date	Description of the Change
02/27/2020	Removed the following Application Security on Cloud products: IBM Application Security on Cloud (5725-T53) Open Source Analyzer for Application Security (5725-S23) Removed the following BigFix Endpoint Security products: BigFix Lifecycle (5725-C43)

BigFix Compliance (5725-C44)
 BigFix Inventory (5725-F57)
 BigFix Detect (5737-D11)
 BigFix Protection (5725-D25)
 Carbon Black Protection
 BigFix Patch (5725-C45)
 Carbon Black Response
 Removed the following Security AppScan products:
 Security AppScan Standard Edition (5724-T59)
 Security AppScan Enterprise Edition (5724-T52)
 Security AppScan Standard Edition for Z
 Security AppScan Source Edition for Z
 Security AppScan Source Edition (5724-Z34, 5724-Z35, 5724-Z36, 5724-Z37)
 Security AppScan Enterprise Edition for Z
 Added IBM Cloud Pak for Security with a \$1M product family clip level - IBM
 Cloud Pak for Security (5737-L74) - SW/ICPS - - - IBM: [SA479](#) BP: [SA479](#)
 Removed IBM PureData System for Operational Analytics A1801 (5725-V11)
 requirements - withdrawn from marketing 04/10/2018

- 03/06/2019 Renamed Analytics to Data & AI
 Changed Checklist for Security Identity Manager to SA479 from SA934
 Removed TDA triggers for all W&CP products - renamed section to Cloud Platform:
 Analytics Engine (AENG) (5900-A16, 5900-A1J)
 Apache Spark (5725-Y50, 5725-Y51)
 Cloudant SaaS (5725-R48, 5725-S99)
 Compose (5737-E32)
 Data Science Experience
 IBM Cloud Public Subscription (Offering)
 Predictive Mdling for Bluemix
 Streaming Analytics (5725-U13, 5725-Y69)
 Watson Knowledge Catalog (previously Data Catalog) (5900-A1L, 5900-A17)
- 01/02/2019 Clarified that Enterprise License Agreement (ELA) aka "Catalog deals" do not
 require Solution Assurance reviews
 Clarified that IBM Cloud Private deals do not need an automatic Expert review,
 they should follow the directions on SA1070 to determine the level of review
 required
 Added link to appropriate checklist page for IBM and BP links on each row as
 appropriate
 Removed products in Cloud that are no longer sold:
 Automation packs and Libraries (SaaS)
 IBM MobileFirst Platform Quality Assurance (aka IBM Worklight Quality
 Assurance) (5725-R25)
 Data Refinery
 Graph Data Store DB

Special Note for Business Partners

The purpose of a Pre-sale TDA Checklist is to provide a roadmap of questions to use when reviewing a configuration and proposal for IBM products and solutions. The purpose of a Pre-install TDA Checklist is to provide a roadmap of questions to use when assessing site readiness and preparing for the installation or implementation. These reviews occur at two different and distinct points in the sales cycle. IBM developed product/solution-specific documentation must be used, completed and stored by IBM personnel and Business Partners, who are involved in the Pre-sale and/or Pre-install Technical and Delivery Assessment (TDA), as evidence of a completed expert review.

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