



IBM Customer ***IBM FileNet Connector for
SharePoint Web Parts Install
Package
Service Description***

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1. Description of Services

Enterprise Content Management (ECM) is pleased to submit this Service Description to IBM Customer (<IBM Cust>). <IBM Cust> has requested the following services from IBM:

➤ IBM FileNet Connector for SharePoint Web Parts (Connector) Install Package

This service provides the expert resources to install the Connector software at your site. It also provides hands-on assistance to address questions, recap key issues covered in formal training classes, and to confirm that <IBM Cust>'s systems and resources are ready to begin applying the knowledge gained in class to <IBM Cust>'s business needs and operational requirements.

The Delivery Consultant will help guide <IBM Cust> on proven strategies and procedures that have been employed at other ECM installations. The completed installation also verifies that the software is supportable by IBM's Product Support organization.

The scope of this Connector package is limited to the installation and a base configuration of the IBM FileNet Connector for SharePoint Web Parts¹.

The Connector Install package will include the following activities:

- Review <IBM Cust>'s environment
- Review current SharePoint Portal Server configuration
- Review current IBM FileNet P8 (P8) Content Manager (CM) configuration
- Install Connector software
- Review Search Functionality
 - Basic Search - provides the ability to search the repository based on document titles and document content.
 - Advanced Search - provides detailed search features such as filtering on document types, options, and properties.
 - Advanced Search with Content-Based Retrieval (CBR) - provides the ability to search on document content, but only if the Content Search Engine component is installed with P8 Platform.
- Add Basic Search web part to a page or Create an P8 Search Center Page
- Add the IBM FileNet User Administration Web Part to a page (optional)
- Add the IBM FileNet Browse Web Part to a page (optional)
- Add the IBM FileNet Personal Inbox Web Part to a page (optional)
- Add the IBM FileNet Public Inbox to a page (optional)
- Test Web Parts
- Demonstrate environment to the project team
- Review Web Parts Administration
- Deliver project management and coordination

¹ The Connector Install requires the P8 Platform with Content Engine version 4.0, Content Search Engine (if using content-based retrieval), Microsoft Web Service Enhancements runtime - required for all clients using the Content Engine .NET API, Process Engine, Application Engine or Workplace XT, and P8 documentation server. This Install also requires Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007. This package includes the installation of the Connector only on one P8 environment. Installation of additional SharePoint integrations and features is considered out of scope for this package.

This package includes a set of tasks that <IBM Cust> must complete to facilitate a product installation and rollout. The actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the anticipated environment.

The resources required for this project will include both the IBM and <IBM Cust> personnel that are required to install and configure the CM software.

Any change in the scope of work defined in this Service Description requested by <IBM Cust> may result in additional costs and must be documented in a Project Change Request (PCR).

2. Required Product Training

As part of the delivery, <IBM Cust> is required to have at least one person complete (or have completed) the following IBM training. The IBM education required for this installation is as follows:

- Course Code: F1420 – P8 Platform Administration

IBM may offer an equivalent Instructor Led Online (ILO) or Self Paced Virtual Course (SPVC). Any of these courses will satisfy this installation package training requirement.

The cost for these training courses is not included in this Connector for SharePoint Web Parts Package. Please refer to the [IBM Learning Services Web site](#) for detailed information regarding class cost, schedules, course descriptions, ordering options, registration instructions and other relevant IBM Web site locations.

While the training defined in this service provides a good foundation for administering the system in a pre-production status, <IBM Cust> should not consider this the total set of training that their resources will need to manage their production system. The ECM Software Services Education team can assist <IBM Cust> in obtaining a recommended training plan specific to <IBM Cust>'s requirements.

For individual training recommendations, please reference the [ECM Software Services Training Paths](#).

For training recommendations for your entire organization, please request an [Enterprise Training Plan](#) or contact the ECM Software Services Education Team at ecmeduna@us.ibm.com or 800-455-7468.

IBM Learning Services web site:

www.ibm.com/software/data/content-management/training.html

In the interests of quality education, IBM reserves the right to update training courses at any time.

3. Resources

The <IBM Cust> Project Team will consist of the resources from the ECM Software Services Account Team, the <IBM Cust> technical staff and, when applicable, an IBM Business Partner. Examples of Project Team members are listed below.

3.1 ECM Software Services Team Resources

The ECM Software Services Project Lead coordinates the appropriate ECM Software Services resources as required. The ECM Software Services Team typically includes the following members:

- Project Manager (PM) – Project Lead
- IT Consulting Specialist (Delivery Consultant)

- Software Sales Representative (SSR)
- Sales IT Specialist (ITS)

3.2 <IBM Cust> Team Resources

<IBM Cust> will need to identify internal personnel to fill the roles of the <IBM Cust> Project Team. <IBM Cust> is responsible for selecting a Project Lead to share lead responsibilities with the ECM Software Services Project Lead.

Depending upon, the project the <IBM Cust> Project Team may include any of the following roles:

- Project Lead
- System Administrator
- SharePoint Services System Administrator
- System Operations Coordinator
- LAN Administrator
- Database Administrator
- Document and/or Records Manager
- Document Entry Supervisor

3.3 <IBM Cust> System Design Resource

<IBM Cust> will need to provide a System Design resource to conduct requirements analysis and system planning for <IBM Cust>'s CM application. This resource will also be responsible for developing a System Design Document that reflects the results of these analysis tasks.

The System Design Resource can be an ECM Software Services resource, an IBM Partner resource, or an individual who is on <IBM Cust>'s staff with strong ECM design and administration knowledge. The effort for this resource is not included in this package and must be engaged separately². IBM strongly recommends that this resource be an IBM FileNet Certified Professional Administrator.

4. Role Definitions

<IBM Cust> will need to identify internal personnel to fill the roles as listed in Section 3, Resources. The following outlines the general roles for each of these individuals. Please note that additional resources may be required at various phases of the installation. Likewise, not all of the individuals may necessarily be involved in this Install service.

Project Lead - This individual will represent <IBM Cust> resources and provide project coordination in conjunction with the ECM Software Services Project Lead.

CM System Administrator (1 to 3 people) - This individual is responsible for the administration functions of the CM system and serves as the on-going administrator. This individual will work closely with the Delivery Consultant during installation and configuration of the Connector.

² Services to complete these activities can be delivered via Statement of Work.

SharePoint Services Administrator (1 person) – This individual will assume responsibility for <IBM Cust>'s SharePoint server. This individual will also provide proper passwords for the Delivery Consultants to perform their functions in the course of the installation when access to this server is required.

Database Administrator (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow the Delivery Consultant to perform his or her functions in the course of the installation when access to the database is required.

5. Responsibilities

5.1 <IBM Cust> Responsibilities

In order to facilitate a delivery, <IBM Cust> has the responsibility to provide the following:

a.) Project Prerequisites

- All prerequisites must be met before IBM can begin the installation of the product³.
- All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software. This includes:
 - Installation of P8 Platform with
 - Content Engine version 4.0,
 - Content Search Engine (if using content-based retrieval),
 - Microsoft Web Service Enhancements runtime - required for all clients using the ContentEngine .NET API,
 - Process Engine,
 - Application Engine or Workplace XT, and
 - Latest 4.0 version of the P8 Platform documentation on your P8 documentation server.
 - Installation of Microsoft SharePoint Server or Microsoft Windows SharePoint Services
 - Installation of SQL Server
 - Installation and application of appropriate levels of patches to meet ECM's minimum requirements
 - All prerequisite hardware and software has been installed onto <IBM Cust>'s designated IBM FileNet servers
- Perform a network check (verify server connectivity to network, addressing, correct protocol).
- Have attended the required training prior to the installation of any ECM software.
- Perform a backup of the SharePoint web site and associated content prior to the installation of the Connector.
- Download the Connector software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
- Complete the *Environment Prerequisite Checklist*.

b.) <IBM Cust> acknowledges that:

- i. CM must be installed, configured, and fully operational prior to the install⁴.
- ii. Content Search Engine (Autonomy K2) must be installed, configured, and fully operational prior to the install, if content-based retrieval is required.⁵

³ Installation of prerequisite products (hardware and software) required for the Connector is <IBM Cust>'s responsibility. Please see the **Hardware/Software Requirements for FileNet Products** document found on <http://www-01.ibm.com/software/sw-atoz/indexF.html>.

⁴ Installation of CM is outside the scope of the Connector Install service. Contact your Software Services Sales Leader for pricing for any additional install services.

⁵ Installation of the Content Search Engine is outside the scope of the Connector Install service. Contact your Software Services Sales Leader for pricing for any additional install services.

- iii. Installation of the Connector software will not be in a highly-available manner (clustering and/or farming) environment. A chargeable PCR may be required to perform the installation in a highly-available configuration.
 - iv. Configuration for Windows Authenticated Authorization (Kerberos Single Signon) is not included in this Install package. A chargeable PCR will be required to perform the configuration in each environment.
 - v. Additional resources and time for the development of “custom applications” are not included in this service.
- c.) A Project Lead with sufficient authority to:
- Represent <IBM Cust>'s interests
 - Serve as the focal point for all decisions and communications
 - Coordinate activities assigned to <IBM Cust> resources
 - Sign project-related documents
- d.) Analysis and requirements gathering of business application rules, business application processes, and application security access as they pertain to the installation of the Connector. The outcome of this process is a System Design Document.
- e.) Local system administrator(s) trained on the administration of the ECM products previously installed.
- f.) After the <IBM Cust> System Administrator has attended the proper training and has reinforced that training by observing the Delivery Consultant during the installation and configuration, he or she will be responsible for expanding the system as needed.
- g.) Adequate facilities for each Delivery Consultant including:
- cubicle, desk, telephone, and Internet access,
 - remote access (e.g., VPN access),
 - direct access to the keyboard.
- h.) When performing remote work, <IBM Cust> will provide VPN access into <IBM Cust>'s network and remote access to a workstation in the network that:
- can connect to all required servers and
 - is preloaded with all required connectivity tools appropriate to <IBM Cust>'s environment.
- i.) Product Subscription and Support Agreement in place through IBM.
- j.) <IBM Cust> will make available all <IBM Cust> personnel required for this project based on the agreed-upon project schedule. Any significant delays caused by <IBM Cust> personnel not being available or project prerequisites not being met may result in schedule delays, which can impact the project sufficiently to require a chargeable PCR addressing additional or extended IBM personnel requirements and additional costs.
- k.) Prove a SharePoint technical resource who will:
- Provide IBM a SharePoint design and architecture document that defines that system.
 - Assist in the completion of the Connector Installation Worksheets
 - Support the joint project team on SharePoint technical tasks.

5.2 IBM Responsibilities

The IBM responsibilities for this package include:

- a.) Review <IBM Cust>'s Environment

- Deliver & Review Environment Prerequisite Checklist
- b.) Review current SharePoint Portal Server configuration
- c.) Review current P8 CM 4.0 configuration
- d.) Install Connector software
- e.) Review Search Functionality
 - Basic Search
 - Advanced Search
 - Advanced Search with CBR
- f.) Add Basic Search web part to a page or Create an P8 Search Center Page
- g.) Add the IBM FileNet User Administration Web Part to a page
- h.) Add the IBM FileNet Browse Web Part to a page (optional)
- i.) Add the IBM FileNet Personal Inbox Web Part to a page (optional)
- j.) Add the IBM FileNet Public Inbox Web Part to a page (optional)
- k.) Test Web Parts
- l.) Demonstrate environment to the project team
- m.) Review Web Parts Administration
- n.) Deliver project management and coordination
- o.) Provide <IBM Cust> a completed Connector Install Checklist

6. Limitations

6.1 Service Limitations

The Connector for SharePoint Web Parts Package does not include repairs, corrections or troubleshooting of performance degradation, data corruption, errors and faults that are discovered during the process due to hardware failures, or non-qualified hardware or operating systems. Repairs, corrections or troubleshooting of such errors and faults will be <IBM Cust>'s responsibility; any IBM involvement will be charged on a time-and-materials (T&M) basis.

ECM Software Services resources will be provided Monday through Friday from 8:00 a.m. to 5:00 p.m., excluding holidays and vacation time. Specific details regarding schedules will be mutually agreed-upon prior to the project start-date.

This package does not include assistance with SharePoint architecture or solution design. IBM will not provide SharePoint product skills but will provide skills covering the SharePoint Connector, its setup and configuration plus FileNet P8.

6.1.1 Travel & Living Expenses

This package does not include travel and living expenses incurred by IBM resources traveling to <IBM Cust>'s site in order to fulfill IBM's tasks and responsibilities pertinent to delivering this service.

The Delivery Consultant may travel to <IBM Cust>'s site for **one (1)** visit for tasks associated in delivering this service. <IBM Cust> will be billed actual travel and living costs.

IBM will invoice <IBM Cust> for travel and living expenses and other reasonable expenses incurred in connection with the package delivery. Amounts are due upon receipt of invoice and payable within 30 days. <IBM Cust>

agrees to pay accordingly, including any late payment fee. <IBM Cust> does not have to pay any amount disputed in good faith while it is being investigated, but <IBM Cust> remains obligated to pay any amount not in dispute.

Additional on-site assistance requested by <IBM Cust> beyond the number of visits indicated above will be billable subject to the execution of a PCR. A visit is four or fewer days at your site by an IBM or IBM subcontract employee. IBM also reserves the right to bill <IBM Cust> for any additional trips that are the direct result of <IBM Cust>'s failure to meet or perform its obligations outlined herein.

7. Project Tasks & Deliverables

The Project Team will perform the following tasks. Deliverables for each task are detailed within the task descriptions.

7.1 Task 1: Kickoff Meeting

The purpose of this meeting is to prepare both the <IBM Cust> team and the ECM Software Services team for the Connector Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The ECM Software Services Project Lead will review the Install package Service Description, the installation tasks, and roles and responsibilities with <IBM Cust>'s Project Team.

7.1.2 Define and Review Project Plan

Once selected, the joint <IBM Cust> and IBM Project Team customizes the sample project plan defining mutually agreed-upon dates for delivery (see Sample Project Plan). Each task is assigned a resource and a time window based on the effort required to complete the task. IBM strongly encourages the practice of joint task assignments as an excellent means of training and knowledge transfer for the team members.

7.1.3 Project Status

The PM will track all issues and document their resolution in an Issues Log. Any issue whose resolution requires a change will be documented in a PCR.

7.2 Task 2: Environment Review

ECM Software Services recommends reviewing any questions arising from the completion of the *Environment Prerequisite Checklist* during the weekly status calls.

Meeting Agenda:

- P8 Platform/Architecture Document
- SharePoint Services environment
- IBM FileNet Content Manager environment
- Installation Prerequisites Checklist
- Administrator contacts

Scope impacts to technical exercises will be discussed as identified to update resources required for the implementation activities.

Upon review of all environments and prerequisites, the PM will then schedule the software installation at least two weeks into the future on a mutually agreed upon date.

7.3 Task 3: Software Installation

The Delivery Consultant, with the assistance of <IBM Cust>'s SharePoint and P8 Administrators, will schedule the software installation. <IBM Cust>'s Administrators must review the release notes included on the software media, which provides the latest information regarding operating system software release levels and patches required for a software installation.

A member of <IBM Cust>'s staff must have attended the P8 Platform Administration training prior to this step to facilitate appropriate system configuration choices and ease support transition to <IBM Cust>.

The Delivery Consultant along with <IBM Cust>'s FileNet P8 Administrator will update the Documentation Server with the SharePoint Connector documentation. <IBM Cust>'s Documentation Server should already be loaded with the latest P8 4.0 Platform Documentation. Following the Documentation update, the Connector software will be loaded on the SharePoint machine with the assistance of <IBM Cust>'s SharePoint Administrator.

7.4 Task 4: Add Web Parts to a Page

The Delivery Consultant, <IBM Cust> SharePoint and P8 System Administrator will create two SharePoint Collectors with one Task Route each.

7.4.1 Search Web Parts

There are three IBM FileNet Search web parts available:

- Basic Search
- Advanced Search
- Advanced Search with CBR

The team will review the search functionality and then determine to add a Basic Search web part to a page or create a Search Center Page.

7.4.2 User Administration Web Part

The IBM FileNet User Administration web part allows you to manage user profile database entries for IBM FileNet web part users.

7.4.3 Browse Web Part (optional)

The IBM FileNet Browse web part allows you to access and browse a folder of a P8 Content Engine object store, as designated in the settings.

7.4.4 Personal Inbox Web Part (optional)

The Personal Inbox web part enables you to view and access your P8 workflow task items from within the Microsoft SharePoint interface. The Personal Inbox web part not only shows you those task items that are assigned to you, but enables you to process them accordingly.

7.4.5 Public Inbox Web Part (optional)

The Public Inbox web part displays public inboxes that you have access to. A public inbox holds work items that can be completed by one of a number of users, rather than by a specific user. You can work on a work item in a public inbox, and can also move a work item from the public inbox to your personal inbox for processing.

7.5 Task 5: Test Web Parts

Once the selected web parts have been added to a page, the Delivery Consultant along with <IBM Cust> Administrators will execute a set of tests to validate the native functionality of the product.

The <IBM Cust> Project Team members can use this phase as a hands-on learning process to ensure they understand the configuration and testing.

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

The Delivery Consultant will review the Connector configuration and setup with the <IBM Cust> SharePoint and P8 System Administrators. The objective will be to provide skills transfer to those <IBM Cust> team members so that they can configure the Connector to support future requests from <IBM Cust> end users. The Delivery Consultant will reinforce topics covered during the install.

7.6.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <IBM Cust>'s System Administrator with respect to maintenance of the system. These are tasks that should be performed daily and will be specific to <IBM Cust>'s usage of the system and its configuration. IBM recommends that the System Administrators develop a schedule of "housekeeping" procedures and tasks to be performed.

7.6.3 Review Backup Methodologies

The Delivery Consultant will review possible backup strategies with the <IBM Cust> System Administrator. This Install Package does not provide for the Delivery Consultant to analyze <IBM Cust>'s backup objectives nor does it develop the plan to meet those objectives.

7.6.4 Problem Reporting

Before calling IBM Customer Support, full documentation of the problem at hand always expedites resolution and helps maintain internal system up-time records. The Delivery Consultant will review troubleshooting and problem reporting procedures and provide a trouble report template to <IBM Cust>. Over time the <IBM Cust> System Administrator will learn to determine the nature of problems that arise and will be able to resolve or report them as necessary.

For integrity issues, IBM requests that <IBM Cust> contact IBM Customer Support by using the IBM toll free Customer Service telephone number 1-800-426-7378 or 1-800-IBM-SERV.

7.7 Task 7: Demonstrate System to <IBM Cust> Project Team

After the initial samples have been tested, ECM Software Services will demonstrate the system to the <IBM Cust> Project Team. The demonstration is an opportunity to share ideas on how to best configure the system, gather immediate feedback on issues that may have been overlooked, and solicit suggestions for system improvements. Other uses for the system are often identified in such meetings, giving impetus for follow-on projects.

7.8 Task 8: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *IBM FileNet Connector for Microsoft SharePoint Web Parts Install Completion Checklist*.

If issues arise after delivery of the Project Completion Checklist, <IBM Cust> should contact IBM Customer Support by using the IBM toll free Customer Service telephone number 1-800-426-7378 or 1-800-IBM-SERV.