

***IBM Customer*** ***IBM FileNet Application  
Connector for SAP R/3 J2EE  
Add-on Component  
Install Package  
Service Description***

January 1, 2010

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## 1. Description of Services

Information Management Analytics & Optimization (IMAO) Software Services is pleased to submit this Service Description to IBM Customer (<IBM Cust>). <IBM Cust> has requested the following services from IBM:

- IBM FileNet Application Connector for SAP R/3 J2EE Add-on Component Install Package

**NOTE: The ACSAP J2EE Add-on Component Install Package can only be sold to follow the IMAO Software Services-delivered ACSAP J2EE Core + 1 Add-on Component Install Package.<sup>1</sup>**

This install provides the expert resources to deliver one or more additional Add-on ACSAP components. This includes related tasks required for integrating SAP with IBM FileNet Image Services (IS) or IBM FileNet Content Manager (P8 CM).

This provides hands-on assistance to address questions, to recap key issues, and to verify that <IBM Cust>'s systems and resources are ready to begin applying <IBM Cust>'s business needs and operational requirements. The Delivery Consultants guide <IBM Cust> on proven strategies and procedures that have been employed by other Enterprise Content Management (ECM) installations. The completed Install verifies that the software is supportable by IBM Product Support organization.

This install provides <IBM Cust> with the following for one (1) environment:

- Review <IBM Cust>'s ACSAP requirements<sup>2</sup>
- Implement one of the following ACSAP components:
  - Inbound Client Linking
  - Inbound Barcode Linking
  - Outbound Data Archiving
  - Outbound Data Retention Tool (DART)
  - Outbound Document Archiving – Printlists
  - Outbound Document Archiving – SAP Scripts
  - Kpro DMS
- Update the ACSAP Plan & Prepare Worksheet
- Update the ArchiveLink Configuration Document
- Customize SAP ArchiveLink for the Add-on Component(s) selected
- Modify ACSAP to support the Add-on Component(s) selected
- Configure storage repository (FileNet P8 Content Manager (P8 CM) or IBM FileNet Image Services (IS))
- Test functionality
- System Administration Handoff
- Demonstrate selected Component functionality to Project Team
- Deliver updated ACSAP Plan & Prepare Worksheet
- Deliver updated ArchiveLink Configuration Document

<sup>1</sup> Contact your Lab Services Sales Manager (LS SM) for assistance in verifying all required installation needs.

<sup>2</sup> Installation of prerequisite products (hardware and software) required for the ACSAP J2EE Platform 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>.

- Deliver project management and coordination

This Install is an add-on function. The Core ACSAP and either the IS or P8 CM product must be installed and operational prior to this Install. If needed, the appropriate Capture product must also have been installed and be fully operational.

This Install Package includes the tasks necessary to implement the selected ACSAP R/3 J2EE Add-on Component. These tasks include:

- overall project management,
- system information gathering,
- installation,
- customization, and
- configuration

The duration of each task may vary based on <IBM Cust>'s configuration and complexity of SAP and the ECM systems. To verify the install, <IBM Cust> is expected to provide resources in a timely manner, to assist in the completion of these tasks.

This project depends on availability of key <IBM Cust> resources to assist in IBM's understanding of the business requirements.

Changes in the scope of work defined in this Services Description may result in additional costs to be documented in a Project Change Request (PCR).

## 1.1 Add On Component Options

### 1.1.1 Inbound Client Linking

Inbound Client Linking is the process of linking incoming documents to transactions in the SAP system using a client application for either P8 CM or IS. P8 CM uses "ACSAP Client for P8" and IS uses "IDM Desktop for R/3". This is an Ad Hoc process of linking documents to SAP.

There are several business scenarios that can be configured for this process and each scenario is considered a separate add-on component. The business scenarios are:

- Storing for Subsequent Entry (Early Archiving) - User A scans document and stores file. User B creates new business object later.
- Assign then Store (Late Archiving) – Image or file is attached to pre-existing business object.
- Store and Enter (Simultaneous Archiving) - One user (scans document and) stores file, immediately creating the business object.
- Store for Assignment Later - User A (scans document and) stores file. User B attaches it to a pre-existing business object later.
- Store and Assign - User links file from local machine to preexisting business object.

### 1.1.2 Inbound Barcode Linking

Inbound Barcode Linking is the process of linking incoming documents to transactions in the SAP system using a barcode processing. This is an automated process of linking documents to SAP.

There are two business scenarios that can be configured for this process and each scenario is considered a separate add-on component. The business scenarios are:

- Storing for Subsequent Entry (Early Archiving) - User A attaches barcode to document, scans and stores it. Sends hard copy to User B. User B creates business object and as last step, enters the barcode; ArchiveLink matches the internal and external barcodes and creates a link.
- Assign then Store (Late Archiving) - User A creates business object, entering barcode as last step. User B scans barcoded document. ArchiveLink matches the internal and external barcodes and creates a link.

### 1.1.3 Outbound Data Archiving

Outbound Data Archiving is a two-step process of automatically storing and accessing archived files.

SAP applications create large volumes of data, which at some point, is no longer required to be online and must be archived. SAP uses ArchiveLink and Data Archiving to control the management, generation and storage of data archive files. SAP writes the data to be archived sequentially in a file in the SAP server. These files are then transferred to the content repository.

### 1.1.4 Outbound DART – SAP Data Retention Tool

DART was originally developed to comply with the specific requirements of the IRS regarding data retention and evaluation.

- Establish audit trail, authenticity and integrity of retained records relative to source documents.
- Enables data to be retained outside of the database while meeting legal retention periods as defined by tax laws.

### 1.1.5 Outbound Document Archiving – Printlists

Print Lists are the results of reporting programs in SAP application ex. Accumulated Balance Audit Trials, Cost Centers Reports.

### 1.1.6 Outbound Document Archiving – SAPscript or Smart Forms

Outbound or Outgoing documents are created using the SAP word processing system SAPscript or Smart Forms. These documents can be displayed via different output channels, such as printers, fax machines or computer screens. There is a special channel for storage via ArchiveLink, outbound documents are transferred from the SAP system to storage as .pdf files.

### 1.1.7 KPro/DMS – Knowledge Provider Document Management Service

The Kpro/DMS Integration allow you to store Kpro/DMS content in a P8 CM or IS repository through HTTP Content Server (HCS) interface.

- Upload documents through SAPGUI front-end
- SAP server commits document to FileNet backend
- Versioning handled in SAP through DMS DIR
- FileNet repository can be used instead of or in addition to SAP Content Server
- Leverages FileNet's high-scalability and performance

- Once deemed “final” documents can be archived through ArchiveLink

## 2. Required Product Training

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

- F042 – P8 Platform Administration 4.5 **or**
- F4580 – Image Services (IS) System Administration

*Please note that 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 ACSAP J2EE Add-on Component Install 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 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 Training Paths](#).*

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

IBM Learning Services web site:

[www.ibm.com/software/data/content-management/training.html](http://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 IMAO 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 IMAO Software Services Team Resources

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

- Solution Implementation Manager (SIM) – Project Lead
- Lab Services IT Specialist (Delivery Consultant)
- Field Delivery Consultant (FDC)
- 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 IMAO Software Services Project Lead.

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

- Project Lead
- FileNet System Administrator
- FileNet Capture Administrator
- Web Application Server Administrator
- System Operations Coordinator
- Client Desktop Coordinator
- LAN Administrator
- SAP Basis Technical Resource
- SAP Functional Resource
- Document and/or Records Manager
- Document Entry Supervisor
- End-User Manager
- End-User Specialist
- Application Developer
- Workflow Consultant

## 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 IMAO Software Services Project Lead.

FileNet System Administrator (1 to 3 people) - This individual will be the administrator for the IBM FileNet system and should have already completed the IS or P8 Administration course. This individual will work closely with the Delivery Consultant during the configuration of the IBM FileNet software.

FileNet ACSAP Systems Administrator - This individual will be the administrator for the ACSAP application. This individual will work closely with the FileNet System Administrator and the SAP Basis resource to configure the ACSAP application for <IBM Cust>. This person may or may not be the same person as the FileNet System Administrator. This individual will work closely with the Delivery Consultant during the configuration of the IBM FileNet software.



## 5. Responsibilities

### 5.1 <IBM Cust> Responsibilities

In order to facilitate 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 product.
  - ACSAP prerequisites found in the Application Connector for SAP R/3, J2EE Edition, Hardware and Software Requirements document.
  - All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software. This includes:
    - Installation or validation of the operating system and version
    - Installation of the web application server
    - Installation and/or application of appropriate levels of patches to meet ECM's minimum requirements
  - Perform a network check (verify server connectivity to network, addressing, correct protocol).
  - Ensure either IS or P8 CM is installed, configured, and fully operational prior to the software installation<sup>3</sup>.
  - Ensure ACSAP J2EEE Core software is installed, configured, and fully operational prior to this component configuration.
  - Ensure the Web Application Server (i.e. Weblogic, Websphere, JBOSS, etc.) is installed and operational.
  - Download SAP JCO (Java Connector) software from SAP Service Marketplace.
  - If installing with IS, IBM FileNet Capture Professional is required to be installed and fully operational prior to the initiation of this project (Inbound Document Linking only).
  - If installing with P8 CM, Capture Desktop or Capture Professional (v4.0 or higher) is required to be installed and fully operational prior to the initiation of this project (Inbound Document Linking only).
  - Complete the Environment Prerequisite Checklist.
  - Have attended the required training prior to the installation of any ECM software.
- b.) 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
- c.) SAP server environment.
- d.) SAPGUI Client is installed and operational.
- e.) Analysis and requirements for business application rules, processes, and security as they pertain to the installation of the selected add-on component(s).
- f.) Local system administrator(s) trained on the administration of the ECM products previously installed.

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<sup>3</sup> Installation of IS or P8 CM is outside the scope of this Install Package. IBM can perform the installation for <IBM Cust> upon purchase of the appropriate Install Package.

- g.) After the <IBM Cust> System Administrator has attended the proper training and has observed the Delivery Consultant during the installation, he or she will be responsible for administering the environment.
- h.) Local help desk personnel trained on the ECM client products to be installed at <IBM Cust>.
- i.) Adequate facilities for each Delivery Consultant including:
  - cubicle, desk, telephone, and Internet access,
  - remote access (e.g. VPN access),
  - direct access to the keyboard.
- j.) 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 pre-loaded with all required connectivity tools appropriate to <IBM Cust>'s environment.
- k.) IBM recommends reserving a conference room and presentation projector for the week of the on-site visit.
- l.) After the <IBM Cust> System Administrator has attended the proper training and has observed the Delivery Consultant during the installation, he or she will be responsible for expanding the environment.
- m.) Product Subscription and Support Agreement in place through IBM.
- n.) <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.

## 5.2 IBM Responsibilities

- a.) Environment Review
  - Deliver & Review the Environment Prerequisite Checklist
  - Deliver & Review the ACSAP Plan & Prepare Worksheet
- b.) Perform Requirements Gathering.

Select one of the following Components for this Requirements Gathering:

  - Inbound Client Linking
  - Inbound Barcode Linking
  - Outbound Data Archiving
  - Outbound DART
  - Outbound Document Archiving – Printlists
  - Outbound Document Archiving – SAP Scripts
  - Kpro DMS
- c.) Verify <IBM Cust> has met project prerequisites.
- d.) Review of IS or P8 CM Software Configuration.
- e.) Review of Core ACSAP R/3 J2EE Configuration.
- f.) Update ACSAP Plan & Prepare Worksheet.

- g.) Install SAP JCO (Java Connector – if executing client linking with barcodes)<sup>4</sup>
- h.) Review Capture installation (if needed).
- i.) Customize and document SAP ArchiveLink configuration.
- j.) Configure ASCAP Software for selected component(s) for one environment.
- k.) Configure necessary Client Components (if necessary).
- l.) Test ACSAP functionality.
- m.) Perform System Administration Handoff
  - Transfer of Information
  - Routine Maintenance
  - Problem Reporting
- n.) Demonstrate the ACSAP System functionality to <IBM Cust> Project Team.
- o.) Deliver the updated ACSAP Plan & Prepare Worksheet.
- p.) Deliver the updated ArchiveLink Configuration Document.
- q.) Provide <IBM Cust> a completed ACSAP J2EE Add-on Component Install Checklist.

## 6. Assumptions & Limitations

### 6.1 Assumptions

- a.) Installation of ACSAP software will not be in a clustered environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- b.) Installation of ACSAP software will not be in an SSL environment. A chargeable PCR may be required to perform the installation in a SSL environment.
- c.) Additional resources and time for the development of “custom applications” are not included in this service.

#### 6.1.1 Use of IBM FileNet Capture Professional (Capture)

If the Inbound Processing Add-on component was selected, the following details regarding the Capture configuration should be validated by <IBM Cust> prior to the arrival of the Delivery Consultant.<sup>5</sup>

- Verify that the scanner, scanner controller, and Microsoft Windows operating system are installed and operating properly on the IS or P8 CM system
- Verify installation and configuration of Kofax Image Controls and Software (if applicable)
- Verify Capture software installation and/or configuration.
- If SAP Bar Code processing is required, then <IBM Cust> is responsible for ensuring that Capture is setup to recognize bar coding.

<sup>4</sup> <IBM Cust> must download SAP JCO from the SAP Service Marketplace.

<sup>5</sup> Installation of Capture Professional is outside the scope of this installation service. IBM can perform the installation for <IBM Cust> upon purchase of the appropriate Install Package.

## 6.2 Service Limitations

- a.) The ACSAP J2EE Add-on Component Install 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.
- b.) Installation of IS or P8 CM, IBM FileNet Desktop, Capture or IBM FileNet Web Services is not included within the scope of this Install.
- c.) Installation of SAP Business Workflow or SAP Client Software (SAPGUI) is not within the scope of this Install.
- d.) ECM Application programming is not within the scope of this install.
- e.) Configuration of SAP's Archive Development Kit (ADK) or Data Retention Tool is not within the scope of this Install service. <IBM Cust> is responsible for the configuration and operation of the SAP system and all SAP business applications.
- f.) This Install service provides customization of SAP ArchiveLink for the selected component(s) functionality only.
- g.) IMAO 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.

### 6.2.1 Travel & Living Expenses

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

The Delivery Consultant will 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 IMAO Software Services team for the ACSAP J2EE Add-on Component Install Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

### 7.1.1 Review Project Services Description

The IMAO 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

The project team develops a custom project plan specific to <IBM Cust>'s installation.

Each project task is assigned appropriate resources and time window based on the effort required to complete the task. Those tasks requiring specialized ACSAP experience are assigned to the IMAO Software Services resource with the appropriate skill set. Acceptance of the plan by the project team initiates the ACSAP J2EE Core +1 Add-on Install.

The starting date for this project must be scheduled and confirmed by the IBM and <IBM Cust> Project Leads and Delivery Consultant.

### 7.1.3 Environment Review

The SIM will review the ECM software purchased, <IBM Cust>'s server configuration (hardware, operating system and site specific software), ECM-specific network configuration, and <IBM Cust>'s System Diagram. This review will encompass the items indicated in the *Environment Prerequisite Checklist* that is delivered to <IBM Cust>. Upon completion of <IBM Cust>'s portion of this document, the SIM will schedule the software installation.

In addition to the *Environment Prerequisite Checklist*, the Delivery Consultant will generate an installation *ACSAP Plan & Prepare Worksheet*. This worksheet will gather specific details needed to perform the installation, such as server names, IP addresses, directory paths, tablespace names, administrator IDs, etc. The Delivery Consultant will review the *ACSAP Plan & Prepare Worksheet* with the <IBM Cust> resource who will coordinate the completion of this spreadsheet. A number of items listed on this worksheet must be completed on or by <IBM Cust>'s systems or administrators days or weeks prior to the initiation of the installation. Focus should be on the priority defined by the Delivery Consultant.

IMAO Software Services recommends reviewing any questions arising from the completion of the *Environment Prerequisite Checklist* or the *ACSAP Plan & Prepare Worksheet* during the weekly status calls.

### 7.1.4 Project Status

The SIM 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: SAP Business Analysis Review

The IBM Delivery Consultant and <IBM Cust> will review the completed SAP business analysis that led to the decision to implement the one selected component. The IBM Delivery Consultant is not an SAP business analyst and is not responsible for completing the business analysis for <IBM Cust>.

- Inbound Client Linking
- Inbound Barcode Linking
- Outbound Data Archiving
- Outbound DART
- Outbound Document Archiving – Printlists
- Outbound Document Archiving – SAP Scripts
- Kpro DMS

This may include reviewing:

- Business process to archive link enable,
- document types,
- business objects and
- transaction codes used to perform the business functions.

### 7.3 Task 3: ACSAP Requirements Gathering

The Delivery Consultant will gather details on <IBM Cust>'s SAP and IBM FileNet Systems (i.e., users, document types, document routing, archive types, etc.).

IBM FileNet and SAP systems can be configured in a variety of ways to meet the requirements of a business application. Adequate configuration to meet <IBM Cust>'s processing demands begins with valid business assumptions which were discussed in Task 2. The Project Team discusses these assumptions and various application requirements to define a set of parameters for system configuration.

Analysis details for <IBM Cust>'s SAP and IBM FileNet systems include:

- System domain names and network addresses
- Users, groups and security access
- Database partition sizing
- Document types, classes and families
- Document output volumes (data archived and retrieved)
- Document input volumes (scanned images)
- Document output volumes (images retrieved)

Changing business assumptions may require changes in the configuration.

### 7.4 Task 4: Product Plan & Prepare Worksheet (Draft) and Architecture Review Meeting

Armed with information gathered, the Delivery Consultant builds a draft Product Plan & Prepare Worksheet containing the following:

- System identification and functionality
- Installation parameters

- Configuration settings
- Users, Groups
- SAP information for the ArchiveLink customization (Document Types, Business Objects, Document Classes, etc.)
- FileNet properties (Document Classes, Index Properties, Queue and Workspace information)
- Security profiles
- Other pertinent data

This document describes details for the Add-On Component(s) configuration and is the guidebook for subsequent installations and projects.

## 7.5 Task 5: Verify Core ACSAP Install

### 7.5.1 Verify Web Application Server

ACSAP R/3 J2EE components must be installed and configured on a J2EE compliant Web Application server (i.e. BEA Weblogic, JBOSS, WebSphere, etc.), which is separate from the IS or P8 CM server.

### 7.5.2 Verify ISRA Install (IS Implementation Only)

ISRA is required to maintain communications between ACSAP server components and IS. ISRA needs to be installed and deployed and configured only when using IS.

ISRA is not needed if P8 CM is used.

### 7.5.3 Review of IS or P8 CM on IBM FileNet Server

The Delivery Consultant will review the existing IS or P8 CM configuration and modify as needed to support ACSAP Add-On components.

## 7.6 Task 6: ACSAP Add-On Component Configuration

The ACSAP configuration tool is used to define the ACSAP parameters. The following is an example of information that will be required during configuration:

- SAP Version
- SAP System Name
- SAP Host Name
- SAP Gateway Service
- SAP Client Number
- SAP User
- SAP Password
- SAP Archive ID

In addition, the following components are defined and configured as part of the ACSAP Add-On Install service:

- Disk Families (IS only)
- Document Classes (up to 3)
- Property and/or Index Fields
- Queues and Workspaces

The ArchiveLink processing functions are setup on the SAP system via customization screens that enable the Delivery Consultant to define the associated queues, directories, protocols and specific function parameters to deploy the functions to be invoked. This customization is based upon the discussions and decisions defined in previous tasks.

The configuration is limited to three business objects and/or document types or business scenarios and will be documented in the ArchiveLink Configuration Document.

A viewer must be selected and configured within SAP to meet business requirements.

Viewers that can be used include:

- SAPGUI
- Thin Client

The Delivery Consultant will review the parameters after being configured by the customer's SAP System Administrator.

## 7.6.1 Inbound Processing

Inbound Processing is either Client based (Ad Hoc entry) or Barcode based (automated). These types are treated as separate Add-On components.

The following is required to complete the appropriate SAP system configuration for Inbound Processing:

- Technical Document Classes
- Global Document Types
- Business Objects used for the required SAP transactions
- Content Repository Settings
- Communication Settings
- Protocol Settings
- Link Tables
- SAP Business Workflow Document Types
- SAP Business Workflow Parameters
- Bar Code Types
- Business Scenarios (Early, Late, etc)

### 7.6.1.1 *Customize ArchiveLink*

The Delivery Consultant will customize ArchiveLink to reflect the Inbound Processing parameters which includes defining the method to link incoming documents, automated (using barcodes) or ad hoc, which includes:



- Setup of SAP Technical Document Classes and Document Types
- Setup of Inbound Processing Menu
- Barcode setup for SAP ArchiveLink
- Barcode setup for ACSAP R/3 J2EE
- Queue and Workspace setup on IS or P8 CM

### 7.6.1.2 *Select Business Scenario*

In addition, the business scenarios need to be designated as one or more of the following:

- Storing for Subsequent Entry (aka Early Archiving)
- Assign then Store (aka Late Archiving)
- Store and Enter (aka Simultaneous Archiving)
- Storing for Subsequent Assignment
- Store and Assign

### 7.6.1.3 *Barcode Processing*

Barcode Processing only uses the Early or Late scenarios.

If using Client Inbound Processing additional modifications will be completed as necessary for the required ACSAP client application:

IS: IDM Desktop for SAP R/3

- IBM FileNet Browse for R/3
- IBM FileNet Queue for R/3
- Capture CIM

P8 CM: ACSAP Client for P8

- ACBrowsePortlet
- ACQCimPortlet

## 7.6.2 **Outbound Data Archiving**

Data Archiving is a two-step process of automatically storing and accessing archived files. The Delivery Consultant will assist <IBM Cust> in determining how to automate this process.

The following is required to complete the appropriate SAP system configuration for Outbound Data Archiving:

- Technical Document Classes
- Global Document Types
- Business Objects used for the required SAP transactions
- Content Repository Settings
- Communication Settings

- Protocol Settings
- Link Tables
- Schedule ArchiveLink Jobs
- Archive Object Customization
- Temp space sizing on the ACSAP system for transfer of data archives

#### 7.6.2.1 *Customize ArchiveLink*

The Delivery Consultant will customize ArchiveLink to reflect the Outbound Processing parameters which includes:

- Setup of SAP Technical Document Classes and Document Types
- Testing of Data Archive process using EXAMPLE object in SAP

#### 7.6.3 **Outbound DART**

DART enables financial data to be retained outside of the database while meeting legal retention periods as defined by tax laws.

The following is required to complete the appropriate SAP system configuration for Outbound Data Archiving:

- Technical Document Classes
- DART Document Types
- Business Objects used for the required SAP transactions
- Content Repository Settings
- Communication Settings
- Protocol Settings
- Link Tables
- Staging area (filesystem) on the SAP system for DART extracts
- Temp space sizing on the ACSAP system for transfer of DART extracts

#### 7.6.3.1 *Customize ArchiveLink*

The Delivery Consultant will customize ArchiveLink to reflect the Outbound DART Processing parameters which includes:

- Setup of SAP Technical Document Classes and Document Types
- Setup staging area for DART extracts

#### 7.6.4 **Outbound Document Archiving - Printlists**

Print Lists are the results of reporting programs in SAP application ex. Accumulated Balance Audit Trials, Cost Centers Reports.

The following is required to complete the appropriate SAP system configuration for Outbound Printlists:

- Technical Document Classes
- Global Document Types
- Business Objects used for the required SAP transactions
- Content Repository Settings
- Communication Settings
- Protocol Settings
- Link Tables
- Archive Spool device
- Temp space sizing on the ACSAP system for transfer of outbound Printlists.

#### 7.6.4.1 *Customize ArchiveLink*

The Delivery Consultant will customize ArchiveLink to reflect the Outbound Printlist Processing parameters which includes:

- Setup of SAP Technical Document Classes and Document Types
- Setup Archive Spool device

#### 7.6.5 **Outbound Document Archiving - SAPscript or Smart Forms**

Outbound or Outgoing documents are created using the SAP word processing system SAPscript or Smart Forms. These documents can be displayed via different output channels, such as printers, fax machines or computer screens. There is a special channel for storage via ArchiveLink, outbound documents are transferred from the SAP system to storage as .pdf files.

The following is required to complete the appropriate SAP system configuration for Outbound SAPscript or Smart Forms:

- Technical Document Classes
- Global Document Types
- Business Objects used for the required SAP transactions
- Content Repository Settings
- Communication Settings
- Protocol Settings
- Link Tables
- Archive Spool device
- Temp space sizing on the ACSAP system for transfer of outbound PDF files

#### 7.6.5.1 *Customize ArchiveLink*

The Delivery Consultant will customize ArchiveLink to reflect the Outbound PDF Processing parameters which includes:

- Setup of SAP Technical Document Classes and Document Types

- Setup Archive Spool device

## 7.6.6 Kpro/DMS – Knowledge Provider Document Management Service

The Kpro/DMS Integration allow you to store Kpro/DMS content in a FileNet repository through HTTP Content Server interface.

The following is required to complete the appropriate SAP system configuration for Kpro/DMS:

- Technical Document Classes
- Global Document Types
- Content Repository Settings
- Communication Settings
- Protocol Settings
- Link Tables
- Storage Categories

### 7.6.6.1 *Customize ArchiveLink*

The Delivery Consultant will customize ArchiveLink to reflect the Kpro/DMS Processing parameters which includes:

- Setup of SAP Technical Document Classes and Document Types
- Kpro/DMS environment

## 7.7 Task 7: System Administration Handoff

### 7.7.1 Transfer of Information

The Delivery Consultant reviews the add-on component(s) functionality to reinforce topics covered during the ACSAP add-on install.

### 7.7.2 Routine Maintenance

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

### 7.7.3 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 (1-800-429-7378).

## 7.8 Task 8: Demonstrate System to <IBM Cust> Project Team

Initial testing will be done to ensure that we can archive and retrieve documents or data that have been linked to the IBM FileNet Content Repository. Then IBM will demonstrate the ACSAP J2EE Add-on component(s) 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.

### 7.8.1 System Functional Testing

IBM and <IBM Cust> Project Team members perform functional testing of configured add-on components to verify that all components have been correctly configured and are operating as intended.

The <IBM Cust> SAP functional resources will perform extended testing based of whatever test plan criteria they have designed.

<IBM Cust> will provide resources and access to SAP R/3 J2EE and the IS or P8 CM systems to execute the functionality tests according to the acceptance criteria. If not, <IBM Cust> will accept the Install by default.

<IBM Cust> is responsible for the proper operation of the SAP R/3 J2EE and the IS or P8 CM systems including all business application modules used during testing.

### 7.8.2 Refine System

The Delivery Consultant will lead the Project Team in a system refinement post mortem. The team may identify modifications to the system and the System Administrator will make appropriate changes.

## 7.9 Task 9: ACSAP Final Documentation Deliverables

The Delivery Consultant will provide <IBM Cust> the final versions of the following documents:

- ACSAP Plan & Prepare Worksheet
- ArchiveLink Configuration Document

## 7.10 Task 10: Project Completion Checklist

Upon demonstration of the product, the Delivery Consultants will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *IBM FileNet Application Connector for SAP R/3 J2EE Add-on Component 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 (1-800-429-7378).