IBM

IBM Customer

IBM SAP Archive Connector Business Analysis Package Service Description

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Information Management

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1. Description of Services

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

> ➢ IBM SAP Archive Connector Business Analysis Package Service Description

This service is designed to provide a detailed analysis for implementing the IBM SAP Archive solutions to meet <IBM Cust>'s specific requirements. The Delivery Consultant will perform this by addressing questions, performing data analysis and reviewing business requirements. The Delivery Consultants will guide <IBM Cust> on proven strategies and procedures that have been employed by other ECM customers.

The scope of this package is limited to review one of the following SAP ArchiveLink functionalities:

Check one (1) of the following Components for this Requirements Gathering[1]

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

The SAP Archive Connector Business Analysis Service includes the following activities:

- Review of <IBM Cust>'s SAP environment

- Review archive business requirements for the selected component

- Perform Data analysis and requirements gathering for the selected component

- Create & Review the SAP Archive Connector Business Analysis Document

- Deliver Final SAP Archive Connector Business Analysis Document

- One (1) site visit

- Deliver Project management and Coordination to facilitate a professional project delivery

This Package includes a set of tasks that <IBM Cust> must complete to facilitate a SAP Archive Connector Business Analysis Package. The actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the anticipated Archive Connector environment.

The resources needed for this project will include both the IBM and <IBM Cust> personnel that are required to perform the identified tasks.

At the completion of this Package <IBM Cust>'s will be ready to implement an IBM SAP Archiving product based on <IBM Cust>'s specific SAP archive business requirements.

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

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[1] This Package includes the analysis of one of the above listed components. If more than one component must be reviewed, contact your Software Services Sales Leader (SS SL) to purchase additional services.

2. 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.

2.1 ECM Team Resources

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

- Solution Implementation Project (SIM) – Project Lead
- Software Services IT Specialist (Delivery Consultant)
- Software Sales Representative (SSR)
- Sales IT Specialist (ITS)

2.2 <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 Project Lead.

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

- Project Lead
- FileNet P8 Content Manager (P8 CM) or IBM Content Manager (CM8) System Administrator
- SAP Basis Technical Resource
- SAP Functional Resource
- Document Capture Administrator
- Web Application Server Administrator
- System Operations Coordinator
- Client Desktop Coordinator
- LAN Administrator
- Document and/or Records Manager
- Document Entry Supervisor
- End-User Manager
- End-User Specialist
- Application Developer
- Workflow Consultant

3. 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 analysis service.

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

SAP Functional Resource (2-3 resources) - This individual will be the SAP Functional Administrator for the SAP system. This person should be knowledgeable in <IBM Cust>'s business applications and related business processes. This individual will work closely with the IBM Delivery Consultant and the SAP Basis Resource during SAP Archive Connector Business Analysis for <IBM Cust>.

SAP Basis Technical Resource (1-2 resources) - This individual will be the SAP Basis Administrator for the SAP system and should be knowledgeable in SAP support and have general SAP Basis experience. This individual will work closely with the IBM Delivery Consultant during the SAP Archive Connector Business Analysis for <IBM Cust>.

4. Responsibilities

4.1 <IBM Cust> Responsibilities

In order to facilitate delivery, <IBM Cust> is responsible for providing the following:

a.) Project Prerequisites

- All prerequisites must be met before IBM can begin the Project.
- Completion of the SAP Archive Connector Business Analysis Questionnaire

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.) Analysis/requirements gathering of business rules, business processes, and document/content security access as they pertain to the configuration of the proposed content repository (P8 CM or CM8)

d.) Adequate facilities for each Delivery Consultant including:

- conference room with network access, and a white board or flip chart for the on-site visit, and

- remote access (e.g., VPN access).

e.) 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.

f.) Product Subscription and Support Agreement in place through IBM if the content repository (P8 CM or CM8) has been previously installed.

g.) <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.

4.2   IBM Responsibilities

a.) Review of <IBM Cust>'s SAP environment

- SAP hardware and operating system

- SAP site specific software

- Network configuration

- <IBM Cust>'s System Diagram

b.) Review archive business requirements for the selected component

- Define business requirements

c.) Data analysis and requirements gathering for the selected component

- Identify business process

- Identify document types

- Identify business objects

- Identify transaction codes

d.) Create & Review SAP Archive Connector Business Analysis Document

e.) Deliver Final SAP Archive Connector Business Analysis Document

f.)   Provide <IBM Cust> a completed SAP Archive Connector Business Analysis Completion Checklist

5.   Assumptions & Limitations

5.1   Assumptions

a.) The SAP Archive Connector Business Analysis service does not perform the analysis or design to implement <IBM Cust>'s IBM software for High Availability (HA) or Disaster Recovery (DR) use.[2]

b.) Additional resources and time for the development of "custom applications" are not included in this service.

5.2   Service Limitations

The SAP Archive Business Analysis 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 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.

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[2] Please contact your SS SL for HA or DR services.

5.2.1 Travel & Living Expenses

This Package does **not** include domestic travel and living expenses incurred by ECM 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 with 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 onsite assistance requested by <IBM Cust> beyond the number of visits indicated above will be billable subject to the execution of a PCR. 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.

6. Project Tasks & Deliverables

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

6.1 Task 1: Kickoff Meeting

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

6.1.1 Review Project Services Description

The SIM will review the SAP Archive Connector Business Analysis Package Service Description, the tasks and roles and responsibilities with <IBM Cust>'s Project Team.

6.1.2 Define/Review Project Plan

The Project Team customizes the sample project plan that best fits <IBM Cust>'s SAP Archive Connector Business Analysis project needs (see Sample Project Plan). The plan is designed to complete the project in the shortest possible timeframe. 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.

6.1.3 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.

6.2 Task 2: Environment Review

The Delivery Consultant will review <IBM Cust>'s SAP and IBM Content Repository (if the content repository is installed).

- SAP environment (hardware, operating system and site specific software), network configuration, and <IBM Cust>'s System Diagram.

- IBM Content Repository (hardware, operating system, and site specific software), network configuration, document classes, properties, and business processes.

6.3   Task 3: Review Archive Business Requirements for Selected Component

This phase focuses on the review of the <IBM Cust>'s business requirements for the data and/or documents that need to be archived to an external content repository system.

The Delivery Consultant will review the <IBM Cust>'s SAP archive business requirements that encompasses one of the following components.

- 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

- Transaction codes used to perform business functions

6.4   Task 4: Data Analysis and Requirements Gathering for Selected Component

This Package is specifically designed to ask the necessary questions and guide <IBM Cust> through the analysis and design process of the SAP archiving solution as it relates to the selected component. The Delivery Consultant discusses various SAP Archiving business requirements, business rules, and the desired outcomes with <IBM Cust> and develops the SAP Archive Connector Business Analysis Document.

6.5   Task 5: Create & Review SAP Archive Connector Business Analysis Document

Armed with information gathered, the Delivery Consultant builds a draft SAP Archive Connector Business Analysis Document containing the following:

- System identification and functionality

- SAP information for the archive customization (Document Types, Business Objects, Document Classes, etc.)

- IBM Content Repository properties

- Volume requirements

- Other pertinent data

Upon completion of the document, the IBM Delivery Consultant will review the details with <IBM Cust> to ensure clarity, accuracy, and completeness. Should the underlying business requirements change, the analysis document may also require changes to reflect the new business requirements.

6.6   Task 6: Deliver Final SAP Archive Connector Business Analysis Document

Once the Delivery Consultant & <IBM Cust> have completed the review and any updates needed to the SAP Archive Connector Business Analysis Document, the Delivery Consultant will provide a final version. This document should then be used to guide any subsequent archiving implementation effort.

IBM recommends storing the Business Analysis Document with the chosen IBM content repository configuration documentation delivered by your Field Delivery Consultant. These documents represent a starting point for the SAP Archive implementation and serve as basis for on-going maintenance and modification of the system.

6.7   Task 7: 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 SAP Archive Connector Business Analysis Package Service Description 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.