



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

August 1, 2008

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1. Description of Services

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

- 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 IBM ECM-delivered ACSAP J2EE Core + 1 Add-on Component Install Package.¹

This install provides the expert resources to deliver one or more additional Add-on components. This includes related tasks required for integrating SAP with IBM FileNet Image Manager (“IM”) or IBM FileNet Content Manager (“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 IBM ECM Consultants guide <IBM Cust> on proven strategies and procedures that have been employed by other successful IBM 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
- Implement 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
- Update the ACSAP Environment Configuration 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 (ECM P8 or Image Manager)
- Test functionality
- Demonstrate selected Component functionality to Project Team
- System Administration Handoff
- Deliver updated ACSAP Environment Configuration Worksheet
- Deliver updated ArchiveLink Configuration Document
- Deliver project management and coordination

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

This Install is an add-on function. The Core ACSAP and either the IM or 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 includes overall project management, system information gathering, installation, customization, and configuration tasks necessary for the ACSAP R/3 J2EE selected Add-on Component(s) with IM or CM. The duration of each task may vary based on <IBM Cust>'s configuration and complexity of SAP and the IBM ECM systems. To verify successful install, <IBM Cust> is expected to provide resources in a timely manner, to assist in the completion of these tasks.

The success of this project depends on availability of key <IBM Cust> resources to assist in IBM ECM'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 CM or IM. CM uses "ACSAP Client for P8" and IM 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/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.

R/3 applications create large volumes of data. Most of it is no longer required online and must be archived. SAP uses ArchiveLink and Data Archiving to control the management, generation and storage of data archive files. R/3 writes the data to be archived sequentially in a file in the R/3 server. These files are then transferred to the content repository (FileNet).

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 R/3 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 FileNet 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 successfully complete (or have successfully completed) the following IBM training.

IBM education required for this installation is as follows:

- F002 – P8 Platform Administration²or
- F4580 – Image Services (“IS”) System Administration

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 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 IBM Software Sales Team can assist <IBM Cust> in obtaining a recommended training plan specific to <IBM Cust>’s requirements.

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 IBM ECM Account Team, the <IBM Cust> technical staff and, when applicable, an IBM ECM Business Partner. Examples of Project Team members are listed below.

3.1 IBM ECM Team Resources

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

- IBM ECM Implementation Project Manager (“IPM”) – Project Lead
- Lab Services IT Specialist (“IBM ECM Consultant”)
- Technical Consultant (“TC”)
- IBM ECM Sales Specialist
- IBM ECM Sales IT Specialist (“IBM ECM Sales 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 IBM ECM Project Lead.

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

- Project Lead
- IBM FileNet System Administrator
- IBM FileNet Capture Administrator
- Web Application Server Administrator
- System Operations Coordinator
- Client Desktop Coordinator
- LAN Administrator

² This course is available via classroom, instructor led on-line or eLab instruction.

- SAP Basis Technical Resource
- SAP Functional Resource
- Database Administrator
- Document/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 IBM ECM Project Lead.

Technical Project Installation Resource (1 to 2 people) - This individual(s) will work closely with the IBM Consultant during the installation and configuration of the IBM FileNet software. The resource(s) will provide technical insight into the current <IBM Cust> information systems, as required, for the installation phase. IBM ECM strongly recommends that this individual become familiar with the IBM ECM products by enrolling in IBM ECM training prior to project initiation.

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

DBA (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow IBM ECM Consultants to perform their 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 successful delivery, <IBM Cust> has the responsibility to provide the following:

- a.) Project Prerequisites
 - All prerequisites must be met before IBM ECM 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 IBM 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/application of appropriate levels of patches to meet IBM ECM's minimum requirements
 - Download SAP JCO (Java Connector) software from SAP Service Marketplace.
 - If installing ACSAP with IM, then Image Services Resource Adaptor ("ISRA") must be installed, configured, and fully operational.
- 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 R/3 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 IBM ECM products to be installed at <IBM Cust>.
- g.) After the <IBM Cust> System Administrator has attended the proper training and has observed the IBM ECM Consultant during the installation, he or she will be responsible for administering the environment.
- h.) Local help desk personnel trained on the IBM ECM client products to be installed at <IBM Cust>.
- i.) Adequate facilities for the IBM ECM resources; including cubicles, desks, and telephone, hardware and Internet access service. ECM recommends reserving a conference room and presentation projector for the week of the on-site visit.
- j.) After the <IBM Cust> System Administrator has attended the proper training and has observed the IBM ECM Consultant during the installation, he or she will be responsible for expanding the environment.
- k.) Product Support Agreement in place through IBM ECM to provide for on-going maintenance post-installation.
- l.) <IBM Cust> will make available all <IBM Cust> personnel required for this project in a timely manner. 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 PCR addressing additional or extended IBM ECM personnel requirements and additional costs.

5.2 IBM ECM Responsibilities

- a.) 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
- b.) Verify <IBM Cust> has met project prerequisites.
- c.) Review of IM or CM Software Configuration.
- d.) Review of Core ACSAP R/3 J2EE Configuration.
- e.) Update ACSAP Environment Configuration Worksheet.
- f.) Review IBM FileNet Capture installation (if needed).
- g.) Customize and document SAP ArchiveLink configuration.
- h.) Configure ASCAP Software for selected component(s) for one environment.
- i.) Configure necessary IBM FileNet Client Components (if necessary).
- j.) Test ACSAP functionality.
- k.) Demonstrate the ACSAP System functionality to <IBM Cust> Project Team.
- l.) Perform System Administration Handoff
 - Knowledge Transfer
 - Routine Maintenance
 - Problem Reporting
- m.) Deliver the updated ACSAP Environment Configuration Worksheet.
- n.) Deliver the updated ArchiveLink Configuration Document.
- o.) Provide <IBM Cust> a completed ACSAP J2EE Add-on Component Install Checklist.

6. Assumptions & Limitations

6.1 Assumptions

- a.) <IBM Cust> should have attended the training required in this ACSAP J2EE Add-on Component Install package prior to the installation of any IBM ECM software.
- b.) Either IM or CM must be installed, configured, and fully operational prior to the software installation³.
- c.) IBM FileNet ACSAP J2EE Add-on Component Install software must be installed, configured, and fully operational prior to this component configuration.
- d.) The Web Application Server (i.e. Weblogic, Websphere, JBOSS, etc.) must be installed and operational.
- e.) <IBM Cust> will perform a Network check (verify server connectivity to network, addressing, correct protocol).
- f.) All prerequisite hardware and software has been installed onto <IBM Cust>'s designated IBM FileNet servers prior to the resource arriving at <IBM Cust>'s facility.
- g.) If installing with IM, IBM FileNet Capture Professional is required to be installed and fully operational prior to the initiation of this project (Inbound Document Linking only).
- h.) If installing with 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).

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

- i.) 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.
- j.) 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.
- k.) Additional resources and time for the development of “custom applications” are not included in this service.

6.1.1 Use of Capture

Below are details regarding the Capture configuration that <IBM Cust> should validate to prepare for if the Inbound Processing Add-on component was selected⁴.

- Verify that the scanner, scanner controller, and Microsoft Windows operating system are installed and operating properly on the IM or CM system
- Verify installation and configuration of Kofax Image Controls and Software (if applicable)
- Verify Capture software installation/configuration:
 - Install and configure Document Processing Component (if applicable)
 - Create repository structure
 - Create Capture Paths
 - Select/configure Capture components for each capture path
 - Create Templates
 - Configure Index properties
 - Customize keyboard shortcuts
 - Create and configure Batch Report attributes and properties
 - Customize UI (user interface)

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 ECM involvement will be charged on a Time and Materials (“T&M”) basis.
- b.) Installation of IM or 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.) IBM ECM Application programming is not within the scope of this install.
- e.) Configuration of SAP's Archive Development Kit (“ADK”) or Data Retention Tool (DART) is not within the scope of this Install service. <IBM Cust> is responsible for the successful 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.

⁴ Installation of Capture Professional is outside the scope of this installation service. IBM ECM can perform the installation for <IBM Cust> upon purchase of the appropriate Install Package.

- g.) IBM 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.

6.2.1 Travel & Living Expenses

This service includes domestic travel and living expenses incurred by IBM ECM resources traveling to <IBM Cust>'s site in order to fulfill IBM ECM's tasks and responsibilities pertinent to delivering this Install Package.

The IPM will initiate the project with a kickoff conference call. Any additional status meetings required will be held via conference calls as well. The IBM ECM consultant will travel to <IBM Cust>'s site for **one** visit for tasks associated in delivering this package service.

Additional onsite assistance requested by <IBM Cust> beyond the amount specified in the above paragraphs may be billable subject to the execution of a PCR. IBM ECM 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 IBM ECM 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 IBM ECM 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/Review Project Plan

The project team develops a custom project plan specific to <IBM Cust>'s installation, which is designed to complete an installation in the shortest timeframe.

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 IBM ECM 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 ECM and <IBM Cust> Project Leads and IBM ECM Consultant.

7.1.3 Project Status

The IPM 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 ECM Consultant and <IBM Cust> will review the business analysis that defined the use of one or more 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 and
- transaction codes used to perform the business functions.

7.3 Task 3: ACSAP Requirements Gathering

The IBM ECM 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 Configuration Worksheet (Draft) and Architecture Review Meeting

Armed with information gathered, the IBM ECM Consultant builds a draft Product Configuration 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 IM or CM server.

7.5.2 Verify ISRA Install (IM Implementation Only)

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

ISRA is not needed if CM is used.

7.5.3 Review of IM or CM on IBM FileNet Server

The IBM ECM Consultant will review the existing IM or 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 (IM only)
- Document Classes (up to 3)
- Property/Index Fields
- Queues and Workspaces

The ArchiveLink processing functions are setup on the SAP R/3 system via customization screens that enable the IBM ECM 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 (3) business objects/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 IBM ECM 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 IBM ECM 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 (OAWD)
- Barcode setup for SAP ArchiveLink
- Barcode setup for ACSAP R/3 J2EE
- Queue and Workspace setup on IM or 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:

IM: IDM Desktop for SAP R/3

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

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 IBM ECM 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 IBM ECM 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 IBM ECM 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 R/3 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 IBM ECM 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 IBM ECM 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 (HCS) 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 IBM ECM 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: Demonstrate System to <IBM Cust> Project Team**

Initial testing will be done to ensure that we can successfully archive and retrieve documents or data that have been linked to the IBM FileNet Content Repository. Then the IBM ECM 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.

7.7.1 **System Functional Testing**

IBM ECM 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 IM or 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 IM or CM systems including all business application modules used during testing.

7.7.2 Refine System

The IBM ECM 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.

7.8 Task 8: System Administration Handoff

7.8.1 Knowledge Transfer

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

7.8.2 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 ECM recommends that the System Administrator develop a schedule of "housekeeping" procedures and tasks to be performed.

7.8.3 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 TC 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 ECM requests that <IBM Cust> contact IBM Customer Support by using the IBM toll free Customer Service telephone number (1-800-429-7378).

7.9 Task 9: ACSAP Final Documentation Deliverables

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

- ACSAP Environment Configuration Worksheet
- ArchiveLink Configuration Document

7.10 Task 10: Project Completion

Upon demonstration of the product, the IBM ECM 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 Checklist*.

If issues arise after completion of the project, <IBM Cust> Project Team will attempt to resolve these problems independently or with the assistance of the IBM Product Support Center.