



IBM Customer ***IBM Content Collector for
SharePoint Install Package
Service Description***

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1. Description of Services

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

- IBM Content Collector for SharePoint (Content Collector for SharePoint) Install Package¹

This service provides the expert resources to install the Content Collector software at your site integrating with IBM FileNet P8 Content Manager (P8 CM) or IBM Content Manager 8 (CM8). 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 Content Collector for SharePoint Install Package is limited to the installation and a base configuration of the IBM Content Collector for SharePoint².

The Content Collector for SharePoint Install Package will include the following activities:

- Review <IBM Cust>'s environment
- Review current SharePoint Portal Server configuration
- Review current SharePoint Document Libraries
- Review current P8 CM or CM8 configuration³
- Install Content Collector for SharePoint
 - Content Collector for SharePoint software
 - Content Collector Server
- Create new Data Store
- Review Settings within Content Collector for SharePoint Configuration Manager
 - Data Stores
 - Connectors
 - Metadata and Lists
 - General Settings
 - Task Routes

¹ This package may be used to implement either the IBM Content Collector for SharePoint product or IBM InfoSphere Content Collector for SharePoint product.

² The Content Collector for SharePoint Install Package requires use of P8 CM or CM8. P8 CM requirements include Content Engine version 4.0.1 or higher, Microsoft Web Service Enhancements runtime (required for all clients using the Content Engine .NET API), and P8 documentation server. CM8 requirements include the CM8 Platform with CM version 8.4 or higher with Information Integrator Content (I4C) Content Manager 8 Connector. This Install package also requires Windows SharePoint Services 3.0 SP2 or Microsoft Office SharePoint Server 2007 SP2. This package includes the installation of the Content Collector for SharePoint only on one ECM Environment – either P8 CM or CM8. Installation of additional SharePoint integrations and features is considered out of scope for this package.

³ Installation of prerequisite products (hardware and software) required for Content Collector for SharePoint 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>.

- Configure three Sample Task Routes
 - Copy
 - Move and Link
 - Move and Delete Source
- Test Configuration
 - Import Test Data from Collection Source (not to exceed 1000 documents of up to 100 Kb per document, limit up to five versions per document)
- Demonstrate environment to the project team
- Perform System Administration Handoff
- Demonstrate environment to the project team
- Deliver project management and coordination

This package includes a set of tasks that <IBM Cust> must complete to facilitate 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 Content Collector 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 previously completed) the following IBM training to support the base ECM environment. The IBM education required for this installation is as follows:

- Course Code: F060 - IBM Content Collector Core Skills
- Course Code: F094 - IBM Content Collector: SharePoint Collection

Additionally if P8 CM

- Course Code: F1420 – P8 Platform Administration

Additionally if CM8

- Course Code: IM401 - IBM DB2 Content Manager V8 Implementation and Administration

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

The cost for these training courses is not included in this Content Collector for SharePoint 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 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 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 Team Resources

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

- Project Manager (PM) – Project Lead
- IT Consulting Specialist (Delivery Consultant)
- Software Sales Representative (SSR)
- Sales IT Specialist (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 ECM Project Lead.

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

- Project Lead
- P8 CM or CM8 System Administrator
- SharePoint Services System Administrator
- System Operations Coordinator
- LAN Administrator
- Database Administrator
- Installation Coordinator
- Document and/or Records Manager (SharePoint & ECM Environment)
- Document Entry Supervisor (SharePoint & ECM Environment)

4. Role Definitions

<IBM Cust> will need to identify internal personnel to fill the roles as listed in Section 3.2, Team 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 Project Lead.

P8 CM or CM8 System Administrator (1 to 3 people) - This individual is responsible for the administration functions of the ECM content management system and serves as the ongoing administrator. This individual will work closely with the Delivery Consultant during installation and configuration of Content Collector for SharePoint.

Content Collector for SharePoint Administrator (1 to 3 people) - This individual will learn the administration functions necessary to oversee the Content Collector for SharePoint system and will serve as the ongoing administrator. This individual will work closely with the Delivery Consultant during installation and configuration of the Content Collector for SharePoint software.

SharePoint Services Administrator (1 person) – This individual will assume responsibility for <IBM Cust>'s SharePoint server. This individual must understand the content types and schemata as defined in the SharePoint site to assist with the data mapping to P8. This individual will also provide proper passwords for IBM 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 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.
- All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software⁴. This includes:
 - If P8: Installation of the P8 Platform with
 - Content Engine version 4.0 or higher,
 - Microsoft Web Service Enhancements runtime - required for all clients using the ContentEngine .NET API, and
 - Latest 4.0 version of the P8 Platform documentation on your P8 documentation server.
 - If CM8: Installation of the CM8 platform with
 - IBM Content Manager 8.4 or higher
 - NetSearch Extender (if text search is required)
 - Installation of Microsoft Office SharePoint Server or Microsoft Windows SharePoint Services
 - Installation of databases for Content Collector for SharePoint (refer to the Hardware/Software Requirements Guide)

⁴ Installation of prerequisite products (hardware and software) required for the Content Collector for SharePoint 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>.

- Installation and/or 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).
 - Perform a backup of the SharePoint web site and associated content prior to the installation of Content Collector for SharePoint.
 - Download the software to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility.
 - Complete the *Environment Prerequisite Checklist*
 - Have attended the required training prior to the installation of any ECM software.
- b.) <IBM Cust> acknowledges that:
- i. This Content Collector for SharePoint Install Package does not include the effort to configure custom use-cases or task routes.⁵
 - ii. This Content Collector for SharePoint Install Package is designed for new product installations only and may not be used for:
 - 1. Content Collector for SharePoint product upgrades,
 - 2. migration of data from IBM FileNet Connector for SharePoint Document Libraries to Content Collector for SharePoint (P8 environments only), or
 - 3. integration with IBM Classification Module, IBM Enterprise Records, or other ECM components.
 - iii. The Content Collector for SharePoint Install Package does not include integration with the IBM Classification Module.
 - iv. Installation of Content Collector for SharePoint software will not be in a -available manner (clustering and/or farming). A chargeable PCR may be required to perform the installation in a highly-available configuration.
 - v. P8 CM or CM8 must be installed, configured, and fully operational prior to this Install package⁶.
 - vi. 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.
 - vii. 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/or requirements gathering of business application rules, business application processes, and application security access as they pertain to the installation of Content Collector for SharePoint. The outcome of this process is a System Design Document.

⁵ The effort to assist <IBM Cust> to design and configure custom use-cases or task routes is not included in this Install package. Contact your Software Services Sales Leader for pricing for any additional services.

⁶ Installation of P8 CM or CM8 is outside the scope of the Content Collector for SharePoint Install service. Contact your Software Services Sales Leader for pricing for any additional install services.

- e.) SharePoint Administrator with SiteAdmin access.
- f.) Local system administrator(s) trained on the administration of the ECM products previously installed.
- g.) After the <IBM Cust> SharePoint & P8 System Administrators have attended the proper training and have 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.
- h.) Adequate facilities for each Delivery Consultant including:
 - cubicle, desk, telephone, and Internet access,
 - remote access to servers (e.g., VPN access),
 - direct access to the keyboard,
 - ECM recommends reserving a conference room and presentation projector.
- i.) 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.
- j.) Product Subscription and Support Agreement in place through IBM.
- k.) <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

The IBM responsibilities for this package include:

- a.) Review <IBM Cust>'s environment
 - i. Deliver & Review Environment Prerequisite Checklist
- b.) Review current SharePoint Portal Server configuration
- c.) Review current SharePoint Document Libraries
- d.) Review current P8 CM or CM8 configuration
- e.) Install Content Collector for SharePoint Software
 - Install Connector Services on the SharePoint server
 - Install Connector Administration Services on SharePoint server or remote server
- f.) Review Settings within Content Collector for SharePoint Configuration Manager
 - Data Stores
 - Connectors
 - Metadata and Lists
 - General Settings
 - Task-routes
- g.) Configure three sample Task Routes
 - Copy
 - Move and Link
 - Move and Delete Source
- h.) Test Configuration

- i. Import Test Data from Collection Source (not to exceed 1000 documents of up to 100 Kb per document, limit up to five versions per document)
- i.) Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- j.) Perform System Administration Handoff
- k.) Demonstrate environment to the project team
- l.) Provide <IBM Cust> a completed Content Collector for SharePoint Install Checklist

6. Limitations

6.1 Service Limitations

The Content Collector for SharePoint 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.

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. 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 team for the Content Collector for SharePoint Install Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The 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 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

The team will review the ECM software purchased, <IBM Cust>'s the technical environment and system architecture. This review will encompass the items indicated in the *Environment Prerequisite Checklist* that was delivered to <IBM Cust>. Upon completion of <IBM Cust> portion of the document, the PM will schedule the software installation.

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

Meeting Agenda:

- P8 CM or CM8 System Configuration Document
- Review current SharePoint Portal Server configuration
- Review current SharePoint Document Libraries
- Section 5 – Environment Prerequisite 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 FileNet 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 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>.

7.3.1 Content Collector for SharePoint Installation

- Update current documentation server with Content Collector for SharePoint documentation (P8 environments only).
- Install Connector Services on the SharePoint server
- Install Connector Administration Services on SharePoint server or remote server
- Complete the initial repository connection wizard

7.4 Task 4: Create the Data Store

Following the Content Collector for SharePoint software installation, the team will add a new database and configure the Data Store.

7.5 Task 5: Review Settings within Content Collector for SharePoint Configuration Manager

The Delivery Consultant will review the following with <IBM Cust>'s Content Collector for SharePoint Administrator to prepare for the Sample Configuration.

- Data Stores – contains the information about the database server and the Content Collector for SharePoint configuration database
- Connectors – lists the email and/or file connections selected during software install process
- Metadata and Lists – used to create customized metadata properties or lists for use in Task Routes
- General Settings – used to configure settings for web service and metadata form
- Task Routes – area used to create Task Routes. Task Routes are a series of tasks to be performed on a document, most commonly to move it from a source location to a document repository. A task route can include rules that determine which task in the task route should be performed next

7.6 Task 6: Configure 3 Sample Task Routes

The team will create the SharePoint Collectors with one Task Route each. A SharePoint Collector retrieves files to be imported from the SharePoint site document library, and submits these files to the task route.

The task routes will perform the following tasks:

- Copy: moves a document from SharePoint library to Repository Store (CM8 or P8), leaving a copy in both the Repository Store and in SharePoint
- Move and Link: moves a document from SharePoint library to Repository Store leaving a link in SharePoint to the document in the Repository Store

- **Move and Delete Source:** moves a document from SharePoint library to Repository Store, deleting the original document from the SharePoint library

When creating the collector, the team will set a collection schedule and specify the collection source (the SharePoint site document library) that contains the files to be imported.

When creating the task routes, the Delivery Consultant will demonstrate the System and Custom Property mappings and rules creation.

7.7 Task 7: Test Configuration

Once the task routes are configured, the team will import test data not to exceed 1000 documents of up to 100 Kb per document, limit up to five versions per document. This data limitation will allow testing to complete within a timely manner.

7.8 Task 8: System Administration Handoff

7.8.1 Transfer of Information

The Delivery Consultant will review the product with the <IBM Cust> System Administrator to help prepare <IBM Cust> for further expansion of the system. The Delivery Consultant will reinforce topics covered during the install including:

- Managing Routing Engine
- Configuration Manager

7.8.2 Routine Maintenance

Routine maintenance involves reviewing the reoccurring duties of <IBM Cust>'s System Administrator with respect to maintenance of the system. These are tasks that should be performed daily or at regular intervals to keep the system healthy. These tasks will be specific to <IBM Cust>'s usage of the system and its configuration and in accordance with recommended practices for system maintenance. IBM recommends that the System Administrators develop a schedule of "housekeeping" procedures and tasks to be performed.

7.8.3 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.

7.8.4 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.

7.9 Task 9: Demonstrate System to <IBM Cust> Project Team

After the initial samples have been tested, Delivery Consultant 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.

7.10 Task 10: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <IBM Cust> an Install Completion Checklist which constitutes completion of this project. Please refer to *IBM Content Collector for SharePoint 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.