



IBM Customer ***IBM FileNet Connector for
SharePoint Document Libraries
Install Package
Service Description***

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1. Description of Services

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

➤ IBM FileNet Connector for SharePoint Document Libraries (Connector) Install Package

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

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

The scope of this Connector Package is limited to the installation and a base configuration of the IBM FileNet Connector for SharePoint Document Libraries¹.

The Connector Install Package will:

- Review <IBM Cust>'s environment
- Review current SharePoint Portal Server configuration
- Review current SharePoint Document Libraries
- Review current IBM FileNet P8 CM (CM) configuration²
- Install Connector software
- Create new Data Store
- Create two SharePoint Collectors with associated Task Route each
 - Two Collection sources per Collector
 - One Task Route to use versioning
 - One Task Route to use Move & Link
 - Configure at least one Redirector
 - Configure System Property mappings
 - Demonstrate Rules creation
 - 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)
- Test each Task Route
- Demonstrate environment to the project team
- Review Document Libraries Administration

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

² Installation of prerequisite products (hardware and software) required for the Connector is <IBM Cust>'s responsibility. Please see the **Hardware/Software Requirements for FileNet Products** document found on <http://www-01.ibm.com/software/sw-atoz/indexF.html>.

- Deliver project management and coordination

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

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

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

2. Required Product Training

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

- Course Code: F002 – P8 Platform 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 Connector for SharePoint Document Libraries 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 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 Project Manager (SIM) – Project Lead

- Lab Services IT Specialist (Delivery Consultant)
- Field Delivery Consultant (FDC)
- 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 IMAO Software Services Project Lead.

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

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

3.3 <IBM Cust> System Design Resource

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

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

4. Role Definitions

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

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

P8 or CM System Administrator (1 to 3 people) - This individual is responsible for the administration functions of the CM system and serves as the on-going administrator. This individual will work closely with the Delivery Consultant during installation and configuration of the Connector.

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.

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

5. Responsibilities

5.1 <IBM Cust> Responsibilities

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

- a.) Project Prerequisites
 - All prerequisites must be met before IBM can begin the installation of the product.
 - All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software³. This includes:
 - 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.
 - Installation of Microsoft Office SharePoint Server or Microsoft Windows SharePoint Services
 - Installation of databases for the Connector (refer to the Hardware and Software Requirements Guide)
 - Installation and application of appropriate levels of patches to meet ECM's minimum requirements
 - All prerequisite hardware and software has been installed onto <IBM Cust>'s designated IBM FileNet servers
 - Perform a network check (verify server connectivity to network, addressing, correct protocol).
 - Perform a backup of the SharePoint web site and associated content prior to the installation of the Connector.
 - 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.) 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 and requirements gathering of business application rules, business application processes, and application security access as they pertain to the installation of the Connector. The outcome of this process is a System Design Document.

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

- d.) SharePoint Administrator with Administrator access.
- e.) Local system administrator(s) trained on the administration of the ECM products previously installed.
- f.) 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.
- g.) Adequate facilities for each Delivery Consultant including:
 - cubicle, desk, telephone, and Internet access,
 - remote access (e.g., VPN access),
 - direct access to the keyboard.
- h.) When performing remote work, <IBM Cust> will provide VPN access into <IBM Cust>'s network and remote access to a workstation in the network that:
 - can connect to all required servers and
 - is preloaded with all required connectivity tools appropriate to <IBM Cust>'s environment.
- i.) IMAO Software Services recommends reserving a conference room and presentation projector.
- 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

- a.) Review <IBM Cust>'s environment
 - Deliver & Review Environment Prerequisite Checklist
- b.) Review current SharePoint Portal Server configuration
- c.) Review current SharePoint Document Libraries
- d.) Review current P8 CM 4.0 configuration
- e.) Install Connector software
 - Install Connector Services on the SharePoint server
 - Install Connector Administration Services on SharePoint server or remote server
- f.) Create new Data Store
- g.) Create two SharePoint Collectors with associated Task Route each
 - Two Collection sources per Collector
 1. One Task route to use versioning
 2. One Task route to use Move & Link
 - a. Configure at least 1 Redirector
 - Configure System Property Mappings
 - Demonstrate Rules Creation

- Import Test Data from Collection Source (not to exceed 1000 documents of up to 10 pages per document, limit up to five versions per document)
- h.) Test each Task Route
- i.) Perform System Administration Handoff
 - Transfer of Information
 - Routine Maintenance
 - Backup Methodology
 - Problem Reporting
- j.) Demonstrate environment to the project team
- k.) Review the IBM FileNet Connector for SharePoint Document Libraries Administration
- l.) Provide <IBM Cust> a completed Connector Install Checklist

6. Assumptions & Limitations

6.1 Assumptions

- a.) IBM FileNet Content Manager (CM) must be installed, configured, and fully operational prior to the install⁴.
- b.) Installation of the Connector software will not be in a clustered or farmed environment. A chargeable PCR may be required to perform the installation in a clustered environment.
- c.) 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.
- d.) Additional resources and time for the development of “custom applications” are not included in this service.

6.2 Service Limitations

The Connector for SharePoint Document Libraries 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.

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 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.

⁴ Installation of CM is outside the scope of the Connector Install service. Contact your LS SM for pricing for any additional install services.

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 IMAO Software Services team for the Connector Project. Topics of discussion will include <IBM Cust>'s requirements, expectations, prerequisites, and schedules.

7.1.1 Review Project Services Description

The 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

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 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: 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 SIM will schedule the software installation.

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

Meeting Agenda:

- IBM FileNet P8 System Configuration Document

- SharePoint Services environment
- IBM FileNet Content Manager configuration
- Installation Prerequisites Checklist
- Administrator contacts

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

Upon review of all environments and prerequisites, the SIM 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 a software installation.

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

7.3.1 Connector Installation

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

- Install Connector Services on the SharePoint server
- Install Connector Administration Services on SharePoint server or remote server

7.3.2 Create the Data Store

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

7.4 Task 4: Create SharePoint Collectors with associated Task Route Each

The team will create two (2) SharePoint Collectors with one (1) 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. One (1) task route will utilize versioning and the other task route will use "Move & Link" to demonstrate typical configurations.

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.

Once these items have been defined and configured, the team will import test data not to exceed 1000 documents of up to 100 Kb per document, limit up to five (5) versions per document. This limited selection will allow testing to complete within a timely manner.

7.5 Task 5: Test Task Routes

Once sample documents are loaded into the system, the Delivery Consultant along with <IBM Cust> Administrators will execute a set of routine business processes with the samples to test the native functionality of the products.

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

7.6 Task 6: System Administration Handoff

7.6.1 Transfer of Information

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

7.6.2 Routine Maintenance

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

7.6.3 Review Backup Methodologies

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

7.6.4 Problem Reporting

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

For integrity issues, IBM requests that <IBM Cust> contact IBM Customer Support by using the IBM toll free Customer Service telephone number (1-800-429-7378).

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

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

7.8 Task 8: Project Completion Checklist

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