



***IBM Customer*** ***IBM Content Collector for SAP  
R/3 J2EE Add-on Component  
Install Package  
Service Description***

**April 1, 2011**

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## 1. Description of Services

IBM Enterprise Content Management (ECM) 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 SAP R/3 J2EE Add-on Component (Content Collector for SAP Add-on Comp) Install Package

***NOTE: The Content Collector for SAP Add-on Comp Package can only be sold to follow the IBM ECM-delivered Content Collector for SAP J2EE Core + 1 Add-on Component Install Package.<sup>1</sup>***

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

This service provides the following for one IBM FileNet Content Manager (P8 CM), IBM Content Manager (CM8), IBM Content Manager OnDemand (CMOD), or IBM Tivoli Storage Manager (TSM) repository environment:

- Review <IBM Cust>'s Content Collector for SAP requirements
- Check one of the following Components for this Requirements Gathering
  - Inbound Client Linking
  - Index Transfer utility
  - Inbound Barcode Linking
  - Outbound Data Archiving
  - Outbound DART
  - Outbound Document Archiving – Printlists
  - Outbound Document Archiving – SAP Scripts
  - Kpro DMS
  - DocFinder utility
- Review <IBM Cust>'s Completed SAP Business Analysis
- Deliver & Review the Plan & Prepare Worksheet
- Customize SAP ArchiveLink for the Add-on Component selected
- Configure Content Collector for SAP to support the Add-on Component selected
- Configure one storage repository<sup>2</sup>
- Test functionality
- System Administration Handoff

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

<sup>2</sup> Select one of the following for the storage repository: IBM FileNet Content Manager (P8 CM), IBM Content Manager (CM8), IBM Content Manager OnDemand (CMOD), or IBM Tivoli Storage Manager (TSM). Configuration for more than one Archive is considered out of scope for this service. Content Collector for SAP is not supported for IBM FileNet Image Manager. Contact your Lab Services Sales Manager for options.

- Demonstrate selected Component functionality to Project Team
- Mentor ECM System Administrator on Content Collector for SAP
- Mentor SAP Basis resource on Customization of SAP ArchiveLink
- Deliver ArchiveLink Configuration Document
- Deliver Content Collector for SAP Environment Plan & Prepare Worksheet (final)
- Deliver project management and coordination

ArchiveLink is the interface layer that connects the P8 CM, CM8, CMOD, or TSM repository to SAP systems. SAP ArchiveLink provides a library of functions to all SAP application modules used to manage documents stored on the ECM system. In conjunction with the ECM system, SAP ArchiveLink provides several processing functions. The ArchiveLink processing functions are to be specifically customized for <IBM Cust> by the ECM Consultant.

This package includes the tasks necessary to implement the Content Collector for SAP Add-on Component with P8 CM, CM8, CMOD or TSM. These tasks include:

- Overall project management
- System information gathering
- Customization
- Configuration

The duration of each task may vary based on <IBM Cust>'s configuration and complexity of SAP and the 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 the Content Collector for SAP Archiving client.

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 Index Transfer Utility

The Content Collector for SAP Index transfer utility is used to transfer index information held in SAP business objects to a Content Manager archive.

The Content Collector for SAP Utility Client needs to be configured for the Index transfer function. The high level tasks involved the following:

- Create SAP system object
- Create Content Collector Server object
- Create archive object
- Create attribute object
- Create index-transfer profile
- Create session object for index transfer operations
- Create filters

### 1.1.3 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.

### 1.1.4 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.

### 1.1.5 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.

### 1.1.6 Outbound Document Archiving – Printlists

Print Lists are the results of reporting programs in R/3 application ex. Accumulated Balance Audit Trials, Cost Centers Reports.

### 1.1.7 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.

### 1.1.8 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

### 1.1.9 DocFinder Utility

The SAP Document Finder lets you search and display documents via the SAP GUI regardless of the of the system and application in which they were created.

The Document Finder Utility requires configuration tasks as follows:

- Create RFC destination
- Create logical archive
- Register a document area
- Setup search for documents in remote systems

## 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:

- Course Code: F142 – P8 Platform Administration 4.5 - **OR**
- Course Code: IM520 – IBM DB2 Content Manager System Administration V8.4 - **OR**
- Course Code: IM17 – IBM DB2 Content Manager OnDemand System Administration - **OR**

- Course Code: TM61 – IBM Tivoli Storage Manager 6.1 Implementation and Administration

*Please note IBM may offer an equivalent Instructor Led Online (ILO) or self paced eLab 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 SAP Add-on Comp 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 ECM Education team can assist <IBM Cust> in obtaining a recommended training plan specific to <IBM Cust>'s requirements.

*For individual training recommendations, please reference the [ECM Training Paths](#).*

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

IBM Learning Services Web Site:

[www.ibm.com/software/data/content-management/training.html](http://www.ibm.com/software/data/content-management/training.html)

In the interests of quality education, IBM reserves the right to update training courses at any time.

### 3. Resources

The <IBM Cust> Project Team will consist of the resources from the 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:

- Implementation Project Manager (IPM) –Project Lead
- Software Services IT Consulting Specialist (ECM Consultant)
- Software Sales Representative (SSR)
- Sales IT Specialist (ITS)

#### 3.2 <IBM Cust> Team Resources

<IBM Cust> will need to identify internal personnel to fill the roles of the <IBM Cust> Project Team. <IBM Cust> is responsible for selecting a Project Lead to share lead responsibilities with the ECM Project Lead.

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

- Project Lead
- ECM System Administrator (P8 CM, CM8, CMOD, or TSM)
- Web Application Server Administrator



- System Operations Coordinator
- Client Desktop Coordinator
- LAN Administrator
- 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 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.

Technical Project Installation Resource (1 to 2 people) - This individual will work with the ECM consultants during installation and configuration of the Content Collector for SAP Core product. These resources will provide technical details of the <IBM Cust> ECM system. IBM strongly recommends this individual become familiar with the IBM products by enrolling in IBM classes prior to the project.

ECM System Administrator (1 to 3 people) - This individual will be the administrator for the IBM P8 CM, CM8, CMOD or TSM. This individual will work closely with the ECM Consultant during the configuration of the IBM software.

IBM Content Collector for SAP Systems Administrator - This individual will be the administrator for the Content Collector for SAP application. This individual will work closely with the IBM System Administrator and the SAP Basis resource to configure the Content Collector for SAP application for <IBM Cust>. This person may or may not be the same person as the P8 CM, CM8, CMOD, or TSM System Administrator. This individual will work closely with the ECM Consultant during the configuration of the IBM software

SAP Functional Resource (1 to 2 people) – This individual understands the SAP business application and specific data parameters. This individual will work closely with the IBM System Administrator and the Delivery Consultant to provide general support and access to SAP business application.

SAP Basis Technical Resource (1 to 2 people) – This individual provides access and configuration changes to archive link and general changes to the SAP administration as needed to implement the Content Collector for SAP application.

Database Administrator (1 person) - This individual will assume responsibility for <IBM Cust>'s database. This individual will also provide proper passwords to allow 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 can begin the installation of the product.
  - o SAP ERP server environment is installed and operational
  - o SAPGUI Client is installed and operational
  - o Content Collector for SAP prerequisites found on the following web site: [http://www-01.ibm.com/support/docview.wss?rs=51&uid=swg27011717&S\\_CMP=rnav](http://www-01.ibm.com/support/docview.wss?rs=51&uid=swg27011717&S_CMP=rnav)
- All hardware, software, and network configurations must meet ECM requirements for system size and performance for the purchased software. This includes:
  - Installation or validation of the operating system and version
  - Installation/application of appropriate levels of patches to meet IBM ECM's minimum requirements
- Perform a Network check (verify server connectivity to network, addressing, correct protocol)
- Ensure target repository (P8 CM, CM8, CMOD, or TSM is installed, configured, and fully operational prior to initiation of this Install Package
- Download the Content Collector for SAP software and associated patches to the appropriate servers prior to the resource arriving at <IBM Cust>'s facility
- Download SAP SAPSECU (security library), SAPJco (java connector), RFC libraries, JavaBeans Activation framework & Java Mail API from SAP Service Marketplace
- Complete the *Environment Prerequisite Checklist*

#### b.) <IBM Cust> acknowledges:

- Additional resources and time for the development of "custom applications" are not included in this service.
- If Implementing Inbound Processing

If the Inbound Processing Add-on component was selected, the following details regarding the scan or capture configuration should be validated by <IBM Cust> prior to the arrival of the Delivery Consultant<sup>3</sup>.

- Verify the scanner, scanner controller, and Microsoft Windows operating system are installed and operating properly on the P8 CM, CM8 or CMOD system
- Verify installation and configuration of Kofax Image Controls and Software (if applicable)
- Verify capture software installation/configuration
- If SAP Bar Code processing is required, then <IBM Cust> is responsible for ensuring the scan or capture is setup to recognize bar coding.

#### c.) A Project Lead with sufficient authority to:

<sup>3</sup> Installation of Capture Professional is outside the scope of this installation service. IBM can perform the installation for <IBM Cust> upon purchase of the appropriate install package.

- 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/requirements gathering of business application rules, business application processes, and application security access as they pertain to the installation of the Content Collector for SAP system.
- e.) Local system administrator(s) trained on the administration of the P8 CM, CM8, CMOD or TSM products installed at <IBM Cust>.
- f.) Local help desk personnel trained on the ECM client products to be installed at <IBM Cust>.
- 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
  - IBM recommends reserving a conference room and presentation projector for the week of the on-site visit.
- 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.) After the <IBM Cust> System Administrator has attended the proper training and has observed the ECM Consultant during the installation, he or she will be responsible for expanding the 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 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 personnel requirements and additional costs.

## 5.2 IBM Responsibilities

- a.) Environment Review
- Deliver & Review the Plan & Prepare Worksheet
- b.) Platform Requirements Gathering
- Check one of the following Components for this Requirements Gathering<sup>4</sup>:
    - Inbound Client Linking
    - Inbound Barcode Linking
    - Index Transfer Utility
    - Outbound Data Archiving
    - Outbound DART
    - Outbound Document Archiving – Printlists

<sup>4</sup> The Content Collector for SAP Add-on Component Install Package includes the configuration of one of the listed components. If more than one component must be configured, contact your Lab Services Sales Manager (LSSM) to purchase additional Content Collector for SAP Add-on Component Install packages.

- Outbound Document Archiving – SAP Scripts
  - Kpro DMS
  - DocFinder Utility
- c.) Review <IBM Cust>'s Completed SAP Business Analysis
- d.) Review P8 CM, CM8, CMOD or TSM software repository configuration
- e.) Install SAP SAPSEU (security library), SAPJco (java connector), RFC libraries, JavaBeans Activation framework & Java Mail API into the Content Collector for SAP appropriate directories<sup>5</sup>
- f.) Configure Content Collector for SAP for the selected SAP functionality
- g.) Configure IBM Client Components (if necessary)
- h.) Customize and document SAP ArchiveLink configuration
- i.) Test Content Collector for SAP functionality
- j.) Perform System Administration Handoff
- Information Transfer
  - Routine Maintenance
  - Problem Reporting
- k.) Demonstrate the Content Collector for SAP Functionality to <IBM Cust> Project Team.
- l.) Deliver Updated Content Collector for SAP Environment Plan & Prepare Worksheet
- m.) Deliver the ArchiveLink Configuration Document
- n.) Provide <IBM Cust> a completed Content Collector for SAP Add-on Comp Install Completion Checklist

## 6. Limitations

### 6.1 Service Limitations

- a.) The Content Collector for SAP Add-on Component Install Package does not include repairs, corrections or troubleshooting of performance degradation, data corruption, errors and faults that are discovered during the process due to hardware failures, or non-qualified hardware or operating systems. Repairs, corrections or troubleshooting of such errors and faults will be <IBM Cust>'s responsibility; any IBM involvement will be charged on a Time-and-Materials (T&M) basis.
- b.) Installation of P8 CM, CM8, CMOD, or TSM 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 package includes the installation services to implement one Content Collector for SAP Add-on Component for customers using P8 CM, CM8, CMOD or TSM. Installation of additional SAP ArchiveLink interface processing Add-on options beyond the one component (e.g. Inbound Processing, Outbound Processing, Kpro DMS, Document Data Archiving, or DART) are available at additional cost.

<sup>5</sup> <IBM Cust> must download SAPSECU library from the SAP Service Marketplace.

- g.) 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 domestic travel and living expenses incurred by IBM ECM resources traveling to <IBM Cust>'s site in order to fulfill IBM'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 ECM Consultant will travel to <IBM Cust>'s site for **one** visit for tasks associated in delivering this package 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. Payment is due upon receipt of invoice. <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. A visit is four or fewer days at your site by an IBM or IBM subcontract employee. IBM also reserves the right to bill <IBM Cust> for any additional trips that are the direct result of <IBM Cust>'s failure to meet or perform its obligations outlined herein.

## 7. Project Tasks & Deliverables

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

### 7.1 Task 1: Kickoff Meeting

The purpose of this meeting is to prepare the <IBM Cust> team and the ECM team for the Content Collector for SAP 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 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 Content Collector for SAP experience are assigned to the ECM resource with the appropriate skill set. Acceptance of the plan by the project team initiates the Content Collector for SAP Add-on Component Install.

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

### 7.1.3 Environment Review

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

IBM recommends reviewing any questions arising from the completion of the *Content Collector for SAP Plan & Prepare Worksheet* during the weekly status calls.

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

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

This may include reviewing:

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

## 7.3 Task 3: Content Collector for SAP Requirements Gathering

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

IBM 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 systems include:

- System domain names and network addresses
- Users, groups and security access
- Database partition sizing
- Document types and classes
- 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: Plan & Prepare Worksheet (Draft) and Architecture Review Meeting

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

- System identification and functionality
- Installation parameters
- Configuration settings
- Users, Groups
- SAP information for the ArchiveLink customization (Document Types, Business Objects, Document Classes, etc.)
- P8 CM, CM8, CMOD, TSM properties (Item Types, Attributes (CM8 and CMOD Only), P8 CM & CM8 work Queue 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 ECM Environment

The P8 CM, CM8, CMOD or TSM environment must be completely installed and operational prior to the start of the Content Collector for SAP Add-on Component Configuration.

## 7.6 Task 6: Content Collector for SAP Add-On Component Configuration

The Content Collector for SAP configuration tool is used to define the Content Collector for SAP 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 CPIC User (Only required for batch workitem creation)
- SAP Password (Only required for batch workitem creation)
- SAP Content Repositories / Archive ID's

In addition, the following components are defined and configured as part of the Content Collector for SAP Add-On Install service:

- Item Types – up to 3
- Attributes
- Work Queues (P8 CM & CM8 ONLY)
- Management Classes (TSM Only)
- SAP User access to P8 CM, CM8, CMOD or TSM

The ArchiveLink processing functions are setup on the SAP R/3 system via customization screens that enable the 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 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
- Viewer & client (for P8 CM & CM8)

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 Content Collector for SAP
- Queue and Workspace setup on P8 CM or CM8

#### 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 Content Collector for SAP client application:

### 7.6.2 **Index Transfer Utility**

The Content Collector for SAP Index transfer utility is used to transfer index information held in SAP business objects to a Content Manager archive.

The Content Collector for SAP Utility Client needs to be configured for the Index transfer function. The high level tasks involved the following:

- Create SAP system object
- Create Content Collector Server object
- Create archive object
- Create attribute object

- Create index-transfer profile
- Create session object for index transfer operations
- Create filters

### 7.6.3 Outbound Data Archiving

Data Archiving is a two-step process of automatically storing and accessing archived files. The 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 Content Collector for SAP system for transfer of data archives

#### 7.6.3.1 *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

### 7.6.4 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 Content Collector for SAP system for transfer of DART extracts

#### 7.6.4.1 *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

### 7.6.5 Outbound Document Archiving - Printlists

Print Lists are the results of reporting programs in R/3 application ex. Accumulated Balance Audit Trials, Cost Centers Reports.

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 Content Collector for SAP system for transfer of outbound Printlists.

#### 7.6.5.1 *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

### 7.6.6 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.

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 Content Collector for SAP system for transfer of outbound PDF files

#### 7.6.6.1 *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

#### 7.6.7 **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.

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

#### 7.6.7.1 *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

#### 7.6.8 **DocFinder Utility**

The SAP Document Finder lets you search and display documents via the SAP GUI regardless of the of the system and application in which they were created.

The Document Finder Utility requires configuration tasks as follows:

- Create RFC destination

- Create logical archive
- Register a document area
- Setup search for documents in remote systems

### 7.6.9 Test

Initial testing will be done to ensure IBM can archive and retrieve documents or data that have been linked to the IBM Content Repository. Then IBM will demonstrate the Content Collector for SAP Add-on component(s) to the <IBM Cust> Project Team.

Initial testing will be done to validate archival and retrieval of documents or data that have been linked to the IBM Content Repository. Then IBM will demonstrate the Content Collector for SAP Add-on component(s) to the <IBM Cust> Project Team.

## 7.7 Task 7: System Administration Handoff

### 7.7.1 Transfer of Information

The ECM Consultant will review the Content Collector for SAP product installation with the <IBM Cust> System Administrator to help prepare <IBM Cust> for further expansion of the system.

As part of the overall installation review, any Add-on services (if purchased) delivered during this service will also be reviewed.

### 7.7.2 Routine Maintenance

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

### 7.7.3 Problem Reporting

Before calling IBM Customer Support, full documentation of the problem at hand always expedites resolution and helps maintain internal system up-time records. The ECM 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 <IBM Cust> contact IBM Customer Support by using the IBM toll free Customer Service telephone number (1-800-429-7378).

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

The demonstration is an opportunity to share ideas on how to best configure the system, gather immediate feedback on issues that may have been overlooked, and solicit suggestions for system improvements. Other uses for the system are often identified in such meetings, giving impetus for follow-on projects.

### 7.8.1 Refine System

The 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.

### 7.8.2 System Functional Testing

<IBM Cust> Project Team members perform functional testing of configured add-on components to verify 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 and the P8 CM, CM8, CMOD or TSM 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 and the P8 CM, CM8, CMOD or TSM systems including all business application modules used during testing.

## 7.9 Task 9: Content Collector for SAP Final Documentation Deliverables

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

- Content Collector for SAP Environment Plan & Prepare Worksheet
- ArchiveLink Configuration Document

## 7.10 Task 10: Project Completion Checklist

Upon demonstration of the product, the ECM consultants will deliver to <IBM Cust> a completed Install Checklist which constitutes completion of this project. Please refer to *IBM Content Collector for SAP R/3 J2EE Add-on Component Install Completion 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.