

Endeca® Content Acquisition System

FileNet Document and Image Services Connector Guide

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Preface

Endeca® InFront enables businesses to deliver targeted experiences for any customer, every time, in any channel. Utilizing all underlying product data and content, businesses are able to influence customer behavior regardless of where or how customers choose to engage — online, in-store, or on-the-go. And with integrated analytics and agile business-user tools, InFront solutions help businesses adapt to changing market needs, influence customer behavior across channels, and dynamically manage a relevant and targeted experience for every customer, every time.

InFront Workbench with Experience Manager provides a single, flexible platform to create, deliver, and manage content-rich, multichannel customer experiences. Experience Manager allows non-technical users to control how, where, when, and what type of content is presented in response to any search, category selection, or facet refinement.

At the core of InFront is the Endeca MDEX Engine,[™] a hybrid search-analytical database specifically designed for high-performance exploration and discovery. InFront Integrator provides a set of extensible mechanisms to bring both structured data and unstructured content into the MDEX Engine from a variety of source systems. InFront Assembler dynamically assembles content from any resource and seamlessly combines it with results from the MDEX Engine.

These components — along with additional modules for SEO, Social, and Mobile channel support — make up the core of Endeca InFront, a customer experience management platform focused on delivering the most relevant, targeted, and optimized experience for every customer, at every step, across all customer touch points.

About this guide

This guide describes the tasks necessary to configure the FileNet Document and Image Services CMS connector.

It assumes familiarity with the concepts of the Endeca Content Acquisition System and the Endeca Information Transformation Layer. For more information, see the *Endeca CAS Developer's Guide* and the *Endeca Forge Guide*.

Who should use this guide

This guide is intended for application developers who are building applications using the Endeca Content Acquisition System, and are responsible for gathering, crawling, joining and feeding the data in different source formats into the Endeca pipeline to transform them into Endeca records.

Conventions used in this guide

This guide uses the following typographical conventions:

Code examples, inline references to code elements, file names, and user input are set in `monospace` font. In the case of long lines of code, or when inline monospace text occurs at the end of a line, the following symbol is used to show that the content continues on to the next line: ↵

When copying and pasting such examples, ensure that any occurrences of the symbol and the corresponding line break are deleted and any remaining space is closed up.

Contacting Endeca Customer Support

The Endeca Support Center provides registered users with important information regarding Endeca software, implementation questions, product and solution help, training and professional services consultation as well as overall news and updates from Endeca.

You can contact Endeca Standard Customer Support through the Support section of the Endeca Developer Network (EDeN) at <http://eden.endeca.com>.



Chapter 1

Configuration steps for FileNet Content and Image Services

Set up the CMS Server for FileNet Content and Image Services, and set options specific to the Image Services and Content Services repositories in the CAS Console for Endeca Workbench. See the "Endeca CAS API Guide" for details on crawling a FileNet Document and Image Services repository through the CAS API.

FileNet Content and Image Services versions supported by this connector

The FileNet Document and Image Services connector supports the following versions of Content and Image Services repositories.

- FileNet Content Services 5.3
- FileNet Content Services 5.4
- FileNet Content Services 5.5
- FileNet Image Services 3.6
- FileNet Image Services 4.0
- FileNet Image Services 4.1

Setting up the CMS Server for FileNet Content and Image Services

To crawl the FileNet Content and Image Services repositories, perform additional configuration steps on the machine on which the FileNet server is running.

The CAS Server uses a web service component to communicate with FileNet Content and Image Services repositories. This web service component must be installed on the FileNet Panagon Web Services server.



Note: The Panagon Web Services server must be on Windows. The following instructions are for configuring Internet Information Services version 5.0.

To install the web service component:

1. Create a directory on the FileNet Panagon Web Services server.
 - Enable **Read and Execute** permission for user Everyone to avoid errors during creation or update of the crawl.
2. Copy the `global.asa`, `Main.asp` and `fnupload.dll` files into the above directory. These files are available in `CAS\version\cms\filenet-dis`.
3. Open the IIS Manager. Go to **Start > Programs > Administrative Tools > Internet Information Services**.
4. In the left panel, navigate to the **Default Web Site**.
5. Right-click the **Default Web Site** and select **New > Virtual Directory...**
 - a) On the **Virtual Directory Wizard** welcome page, click **Next**.
 - b) On the **Virtual Directory Alias** page, enter `CASServer`. Then click **Next**.
 - c) On the **Web Site Content Directory** page, select the directory you created in step 1. Then click **Next**.
 - d) On the **Virtual Directory Access Permissions** page, select **Read, Run Scripts and Execute**. Then click **Next**.
 - e) On the final page, click **Finish**.
6. In the left panel, navigate to the newly created `http://FileNet Panagon Web Services server:port/CASServer` virtual directory.
7. Right-click the new virtual directory and select **Properties**.
8. On the **Virtual Directory** tab, locate the **Application Protection** field and choose **Low (IIS Process)**.
9. Click **OK** to save your changes and close the dialog box.

The web service component is now installed on the FileNet Panagon Web Services server.

Proceed to specify options for the repository in the CAS Console.

Configuration properties for a FileNet Document and Image Services connector

To configure a FileNet Content and Image Services connector, specify the configuration properties listed below.



Note: In addition to configuring the connector-specific properties listed below, you must enter values for the data source username and password.

Create the following configuration properties using either CAS Console or the CAS Server Command-line Utility.

CAS Property Display Name	CAS Property Name	Property Description
Library Name	<code>library</code>	(Required). For Document Services: <ul style="list-style-type: none"> • Specify the name of the FileNet Document Services library, according to this format:

CAS Property Display Name	CAS Property Name	Property Description
		<p><i>Host</i>^<i>System</i>. For example: <code>FILENETIDSHOST^FILENETIDSSYSTEM</code></p> <p>For Image Services:</p> <ul style="list-style-type: none"> Specify the name of the FileNet Image Services library, according to this format: <code>Library^Domain^Organization</code> <p>For example, <code>IMS^panagonis2^MyCompany</code></p>
IDM Web Services URL	webServicesUrl	<p>(Required). Specify the complete URL to the Web Services for FileNet Panagon, using the following format: <code>http://Panagon Web Services server:port/directory</code> , where <i>Panagon Web Services server</i> is the name of the FileNet Panagon Web Services server, <i>port</i> is the port number for the Default Web Site (usually 80), and <i>directory</i> is the directory where you installed the web services component.</p>
System Type	systemType	<p>(Required). For Document Services, use 2. For Image Services, use 1.</p>



Note: Properties are case sensitive.

Permission mapping

The following table shows the mapping between FileNet Image Services and Content Services permissions and resulting Endeca record properties that are produced.

FileNet Image Services roles	Endeca record properties
Owner	Endeca.CMS.AllowReadContent Endeca.CMS.AllowReadProperties
Group	Endeca.CMS.AllowReadContent Endeca.CMS.AllowReadProperties

FileNet Image Services roles	Endeca record properties
Other	Endeca.CMS.AllowReadContent Endeca.CMS.AllowReadProperties

FileNet Content Services permissions	Endeca record properties
Viewer	Endeca.CMS.AllowReadContent Endeca.CMS.AllowReadProperties
Author	None
Owner	None
Admin	None