Oracle Commerce

Content Acquisition System Quick Start Guide

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Contents

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Chapter 1

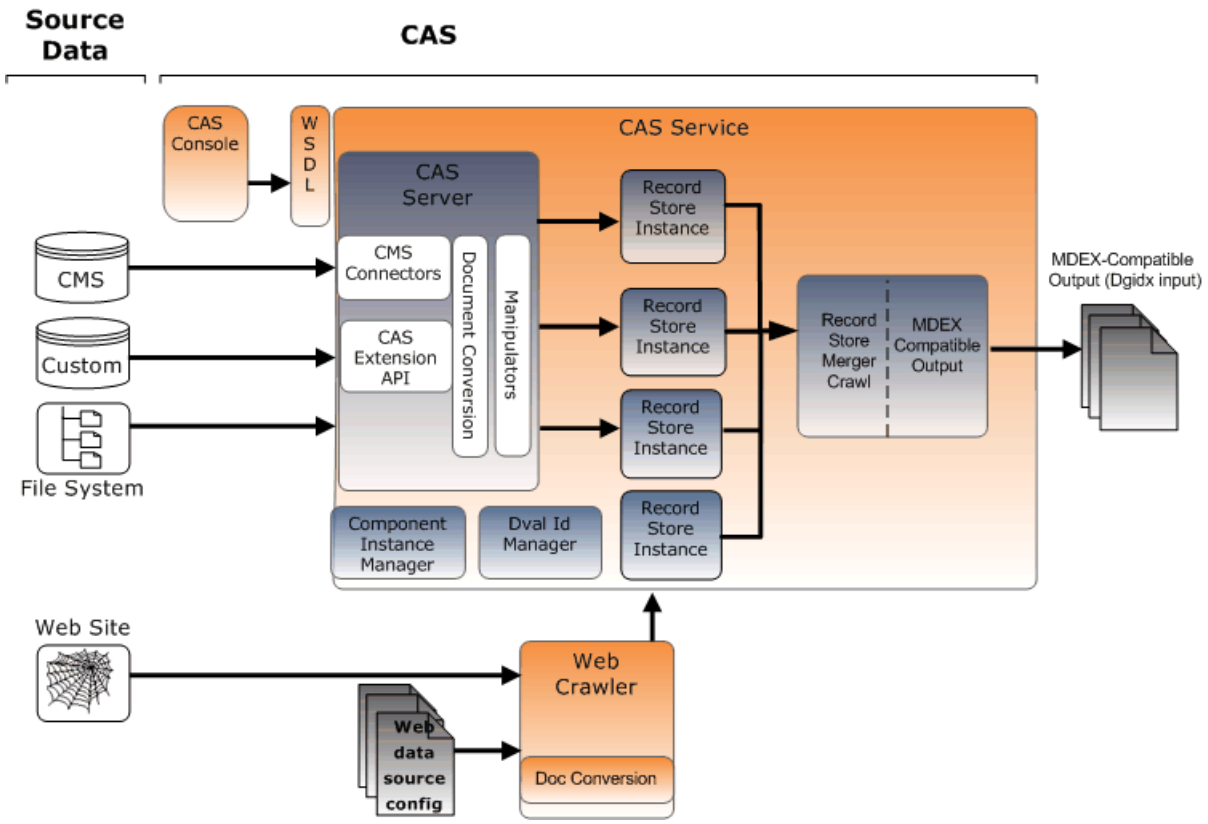
Using the Endeca Content Acquisition System

The CAS Quick Start Guide describes the basics of the Endeca Content Acquisition System (CAS) and then walks you through the high-level process of installing Oracle Endeca Commerce with CAS, adding custom data sources and manipulators, and deploying a reference application that uses CAS to produce MDEX-compatible output. This guide does not describe how to use Forge to process records. Also, the guide does not describe an upgrade or migration scenario.

Overview of the Endeca Content Acquisition System

The Endeca Content Acquisition System is a set of components that add, configure, and crawl data sources for use in an Endeca application. Data sources include file systems, content management systems, Web servers, and custom data sources. The Endeca Content Acquisition System crawls data sources, converts documents and files to Endeca records, modifies the records if necessary, and then typically writes MDEX-compatible output for use by Dgidx.

The following image shows the Endeca Content Acquisition System components as they work together in a typical implementation:



For details about each CAS component shown above, see the *CAS Developer's Guide*.

Installing the required Oracle Endeca software

You must install the Oracle Endeca software in the order listed below before you install the Content Acquisition System.

To determine the version compatibility of the Content Acquisition System with other components in Oracle Endeca Commerce, see the *Oracle Endeca Commerce Compatibility Matrix* available on the Oracle Technology Network.

Install the following software:

1. Install the Endeca MDEX Engine.
2. Install Platform Services.
3. Install Developer Studio.
4. Install Tools and Frameworks (either Guided Search or Experience Manager).
5. Install the Content Acquisition System.

Overview of the default CAS data sources and manipulators

The Content Acquisition System ships with a set of default data sources and manipulators. Each is described here:

Data Source	Description
Delimited File	Crawls records in delimited text files, including .csv files.
Endeca Record File	Crawls Endeca record files including .xml, .xml.gz, .bin, .bin.gz, .binary, and .binary.gz.
File System	Crawls folders and files on both local drives and network drives.
JDBC	Crawls a JDBC-accessible database.
Record Store Merger	Crawls CAS record store instances.

For information about version support for a particular repository, see the data source's chapter in *CAS Developer's Guide*.

Manipulator	Description
Filtering Script	This manipulator runs an inline BeanShell script that filters Endeca records from crawl output.
Modifying Script	This manipulator runs an inline BeanShell script that modifies Endeca records.

For information about configuring a data source or a manipulator, see the *CAS Console Help* or run the `cas-cmd` utility with the `getModuleSpec` task to return configuration properties.

Creating custom data source extensions to CAS

If the data you want to access does not have a corresponding default data source, you can implement a custom data source extension and install it into CAS.

Data source extensions can access any type of data source that you want to include in CAS. For example, data source extensions might access flat files, databases, content management repositories (that do not already have a corresponding data source), and so on.

For details about creating and installing custom extensions to CAS, see the *CAS Extension API Guide*.

Deploying the Discover Electronics reference application using CAS

The Discover Electronics reference application provides a starting point for your custom application that uses CAS. You deploy the Discover Electronics reference application by creating the application using the Deployment Template, provisioning the application, and running a baseline update.

After you examine the reference application in a Web browser, you can modify the reference application's directory structure, control scripts, and application data to reflect your own custom application.

To deploy the Discover Electronics reference application using CAS:

1. If you haven't already, create a directory for deployed Endeca applications, such as `C:\Endeca\Apps` on Windows, or `/usr/local/endeca/apps` on UNIX.
2. Run the Deployment Template to create the reference application:
   a) Open a command prompt or command shell.
   b) Navigate to the `<installation path>\ToolsAndFrameworks\<version>\deployment_template\bin` directory on Windows, or the equivalent path on UNIX.
   c) Run the `deploy` script with the `--app` flag and an argument that specifies the path to the `deploy.xml` descriptor file that uses CAS.

      For example:

      ```
      C:\Endeca\ToolsAndFrameworks\<version>\deployment_template\bin>deploy
      --app C:\Endeca\ToolsAndFrameworks\<version>\reference\discover-data-cas\de¬
      ploy.xml
      ```

   d) Press **Enter** to confirm your Platform Services installation directory.
   e) Specify n when prompted to install a base deployment.

      Note: This configuration is different from deploying using Forge. When using CAS, you must specify no to this prompt.

   f) Specify `Discover` as the application name.

      Note: The application configuration depends on this name and case sensitivity is important.

   g) Specify the application directory previously created for Endeca applications. This is typically a directory, such as `C:\Endeca\Apps` on Windows or `/usr/local/endeca/apps` on UNIX.
   h) Specify the EAC port and then Oracle recommends using the default values for subsequent prompts about port values and the Oracle Wallet.
   i) Specify the path to the CAS installation directory and specify the Endeca CAS Service port.
3. Navigate to the `control` directory of the new deployed application.

   This is located under your application directory, for example: `C:\Endeca\Apps\Discover\control` on Windows.
4. Run the `initialize_services` script.

   This script does the following:

   - Provisions the application in the Endeca Application Controller.
   - Uploads sample templates and configuration to the application.
   - Uploads sample content and media to the application. (This action occurs only if you are using Experience Manager.)
5. Run the `load_baseline_test_data` script.
6. Run the `baseline_update` script.
7. Run the `promote_content` script.
8. Confirm that the Discover Electronics reference applications are running:

   - Navigate to `http://localhost:8006/discover-authoring` to view the authoring version of the Discover Electronics application.
   - Navigate to `http://localhost:8006/discover` to view the live version of the Discover Electronics application.

What's next

At this point, you can add CAS crawling and record processing to your Endeca implementation. Very broadly speaking, you perform the following high-level steps:

- Modify the Discover Electronics reference application to reflect your own custom application. Remember you must start with the reference application that uses CAS not the application that uses Forge.
- Add a data source to the application, and if necessary, add manipulators to a data source.
- Crawl data sources as part of a baseline update or partial update pipeline.
- Automate crawls and update processing.

For details about these tasks, see the *Endeca CAS Developer's Guide*.