

Oracle® Document Capture

Installation Guide

Release 10gR3

E13865-01

November 2010

This document describes how to install Oracle Document Capture. It contains the following main sections:

- ["Installation Overview"](#) on page 1
- ["Installing Oracle Document Capture"](#) on page 4
- ["Performing Post-Installation Tasks"](#) on page 6
- ["Copyright and Patent Notices"](#) on page 14

1 Installation Overview

This section covers the following topics:

- ["About Oracle Document Capture"](#) on page 1
- ["System Requirements"](#) on page 2
- ["Implementation"](#) on page 3

1.1 About Oracle Document Capture

Oracle Document Capture provides production-level scanning and indexing. The application can be directly integrated with Oracle Imaging and Process Management (Oracle I/PM) and Oracle Universal Content Management (Oracle UCM).

Oracle Document Capture includes the components and subcomponents listed in [Table 1](#).

Table 1 Oracle Document Capture Components

Component Type	Component
Capture Administration	Admin Batch Manager Import/Export
Capture Clients	Index Scan for ISIS Scan for Adrenaline
Capture Servers	Recognition Server Commit Server Import Server, along with these providers: <ul style="list-style-type: none">■ Email Provider■ FaxPress Provider■ Custom Provider■ FTP Provider■ Folder/List File Provider
Commit Drivers	Oracle I/PM Commit Driver Oracle I/PM 11g Commit Driver Oracle UCM Commit Driver Oracle UCM 11g Commit Driver Database Commit Driver

1.2 System Requirements

Table 2 lists the minimum operating system (O/S), processor and available memory requirements for each Capture component.

Table 2 Oracle Document Capture System Requirements

Capture Component	Windows O/S	Processor	Available Component Memory
Scan	XP/Vista/7	Pentium 4, 2 Ghz	256 MB
Index	XP/Vista/7	Pentium 4, 2 Ghz	256 MB
Commit Server	XP/2003/Vista/7/2008 R2	Pentium 4, 2 Ghz	256 MB
Import Server	XP/2003/Vista/7/2008 R2	Pentium 4, 2 Ghz	256 MB
Recognition Server	XP/2003/Vista/7/2008 R2	Pentium 4, 2 Ghz	256 MB

Note: Processor speed dramatically affects OCR and Searchable PDF performance. In addition, the Recognition Server's processor speed has a significant impact on its performance.

The following list describes additional requirements:

- All workstations require at least 500 MB of free hard disk space.

- For multi-user systems, a database server is required (Oracle 10.1 or above, or Microsoft SQL Server 2000 or above) and a minimum of a 100Mb/s network. Oracle Database 11gR2 is supported.
- Scan for Adrenaline requires either a hardware or software based Kofax Adrenaline or VRS scanning engine. (A Kofax engine is not needed for Scan for ISIS.)
- To run Commit Server or Recognition Server as a *service* rather than as an application, Java Runtime Environment (JRE) version 1.6 or higher is required.
- The Import/Export utility requires Java 1.6 or higher. If your configuration includes Oracle Document Capture components installed on separate workstations, you must install the Import/Export utility on each workstation containing one or more Oracle Document Capture components.
- This release provides 64-bit support for Capture components on the following platforms, except for the Import Server's virtual printer, which is supported on 32-bit platforms only:
 - Windows 2003
 - Windows 7
 - Windows 2008 R2

Note: In order to use Oracle Document Capture on a 64-bit system, a 32-bit Java Virtual Machine 1.6.0_10 or higher must be installed. (This release does not support 64-bit JVMs.) The Oracle UCM 10g, Oracle UCM 11g, and Oracle I/PM 11g commit drivers require Java.

Note: On 64-bit platforms, the Import Server can use Oracle's Outside In Technology (OIT) technology to convert non-image documents to image format as an alternative to using a virtual printer. See the ReadMe document provided with this release.

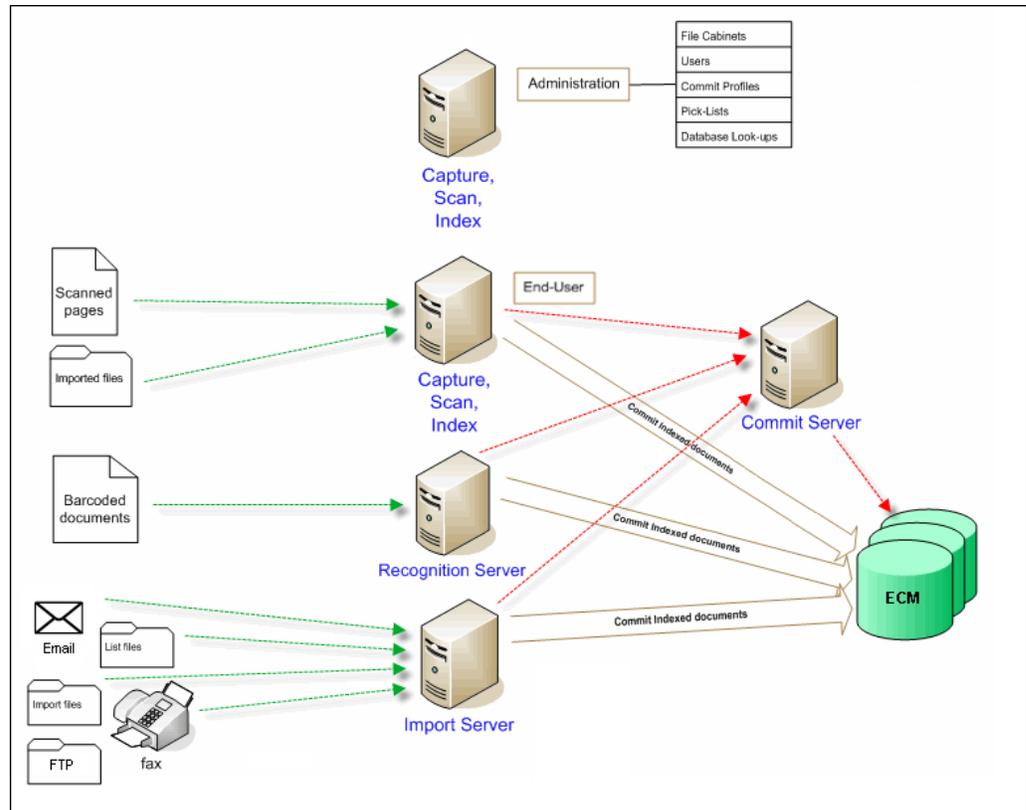
1.3 Implementation

Figure 1 displays a typical Oracle Document Capture implementation scenario. All server components can run on a single server; however, in high volume implementations, the server components are often installed on separate servers.

- An **Administration** workstation runs Capture with administration rights, allowing administrators to configure Capture elements such as file cabinets, users, commit profiles, pick-lists, and database lookups, and to create scan and index profiles and test them as a user.
- **End-User** workstations run Capture, Scan, and Index only. End-users have access to their assigned file cabinets, but no administration rights. After indexing, batches are typically committed (archived) directly into a content management system such as Oracle UCM or Oracle I/PM. Alternately, batches may be sent to the unattended **Commit Server**, which performs commit processing to the content management system.
- An unattended **Recognition Server** processes scanned, barcoded documents and commits the batches to a content management system directly or via Commit Server.

- An unattended **Import Server** imports images and electronic documents from sources such as email, network folders, list files, fax, and FTP sites, then commits processed batches to a content management system directly or via Commit Server.

Figure 1 Typical Configuration of Oracle Document Capture Components



2 Installing Oracle Document Capture

This section covers the following topics:

- "Completing Pre-Installation Tasks (Scan for Adrenaline Only)" on page 5
- "Installing Oracle Document Capture Components" on page 5
- "Uninstalling the Software" on page 6

2.1 Completing Pre-Installation Tasks (Scan for Adrenaline Only)

If installing Scan for Adrenaline, complete the following steps as needed. (If using Scan for ISIS, you can proceed to "[Installing Oracle Document Capture Components](#)" on page 5.)

1. See Kofax.com for Kofax setup instructions.

Note: Kofax Adrenaline/VRS engines are not sold or otherwise provided by Oracle.

2. Install and configure the applicable Kofax Adrenaline/VRS software. You must install the applicable Kofax software before installing Capture.
3. If needed, install the scanner interface card (for example, SCSI or Kofax). Many scanners utilize a USB interface, in which case this step is not needed.
4. Use Kofax's scanning demo application to verify that the scanner and Kofax engines are properly configured.

2.2 Installing Oracle Document Capture Components

Installation consists of running the installer on each workstation and selecting the components appropriate for that workstation. (You can also choose the **Complete** option to install all components.) Also see "[Implementation](#)" on page 3 for a diagram illustrating a typical implementation.

Note: You must be logged in to Windows with Administrator privileges to install Capture components. If you plan to configure Oracle Document Capture to use Domain Security, log in as a domain user with local administrator permissions to install Capture components. For information about Windows Domain versus Capture security, see "[Configuring Security](#)" on page 10.

To install Capture components, perform these steps:

1. Run the SETUP.EXE application for Oracle Document Capture.

The Installation Wizard is displayed.

2. Click **Next**.

You are prompted to supply a username and organization and identify a destination folder. The default installation folder is C:\Program Files\Oracle\Document Capture. The Setup Type window is displayed.

3. Select **Complete** to install all components. Select **Custom** to install certain components only.

For example, if installing on an end-user workstation, you might choose **Custom**, then select the Scan for ISIS and Index components only. If installing on a server, you might choose **Custom**, then select the server (Commit Server, Recognition Server, or Import Server), and Admin and Batch Manager components.

The setup program guides you through the rest of the installation process.

4. Click **Next**. Complete the installation by rebooting the computer when prompted. You must restart your computer to complete the installation.

2.3 Uninstalling the Software

To uninstall Oracle Document Capture, follow standard Windows procedures for removing programs in the Control Panel.

3 Performing Post-Installation Tasks

This section covers the following topics:

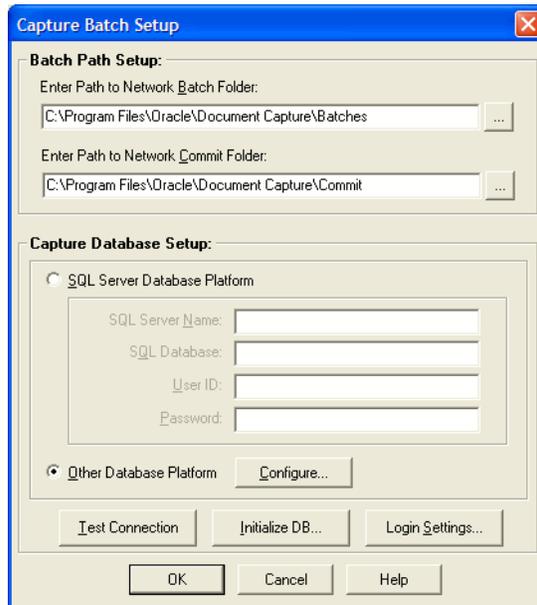
- ["Specifying Capture Batch Folders"](#) on page 6
- ["Configuring the Capture Database"](#) on page 7
- ["Configuring Security"](#) on page 10
- ["Configuring Index Settings"](#) on page 11
- ["Configuring Language Support for OCR and Searchable PDF"](#) on page 12
- ["Configuring the Servers"](#) on page 13
- ["Configuring a Recognition Server License"](#) on page 13

3.1 Specifying Capture Batch Folders

To begin configuring Oracle Document Capture, start the application and complete settings in the screens that are displayed.

1. Start Oracle Document Capture by double-clicking its desktop icon. You can also start the application from the list of programs on the Start menu.

The Capture Batch Setup screen is displayed.



2. In the **Enter Path to Network Batch Folder** field, enter or select the folder in which Capture batches will be stored. Capture creates the folder if it does not already exist.

Because this folder is the location of the Capture batches, its path must be accessible by all Capture workstations. If the path is on a network, it is recommended that you use a UNC (Universal Naming Convention) path. However, you can also use a mapped driver letter.

3. In the **Enter Path to Network Commit Folder** field, enter or select the folder to which Capture batches will be committed. Capture creates the folder if it does not already exist.

This setting specifies the default commit folder for the Commit Text File driver. It is possible to change this path on a per commit profile basis. For more information about committing batches, see the section describing commit profiles in the *Administrator's Guide for Oracle Document Capture*.

Important: The Batch and Commit folders you specify in these steps should not be scanned by anti-virus programs. Anti-virus programs lock files, which makes them inaccessible to Capture processes.

3.2 Configuring the Capture Database

The Capture database stores batch, image, and audit information. It must be properly configured before Capture can be used.

- For *single* user systems, you can configure Capture to use a Microsoft Access database, as described in "[Configuring a Microsoft Access Database](#)" on page 9.
- For *multiple* user systems, it is recommended that you configure the Capture database on a client/server database server platform such as Oracle (see "[Configuring an Oracle Database](#)" on page 8) or Microsoft SQL (see "[Configuring a Microsoft SQL Server Database](#)" on page 10).

Following are the main steps for configuring the Capture database, described in the sections that follow.

1. Select and configure an OLE Database Provider to connect to the Capture database.
2. Initialize the database to create the Capture database schema.
3. Identify the database script. Refer to the following table to determine the script file to use.

Database Platform	Database Version	Capture Script File
Oracle	10.1 or later	Capture_Oracle.sql
Microsoft SQL Server	2000 or later	Capture_SQL.sql
Microsoft Access	2000 or later	Capture_SQL.sql

4. Set up the security model you want used. The Windows Domain and Capture security models are described in "[Configuring Security](#)" on page 10.

3.2.1 Configuring an Oracle Database

Follow these steps to configure Capture with an Oracle database. You will need to identify an Oracle data source.

Typically, you create a new Oracle Document Capture user/schema on the Oracle database with database administration rights. In the steps below, you identify this user in the data source and use it to initialize and create the database schema and tables. A full install of the Oracle Database client on the Oracle Document Capture server is recommended, installing the same version or greater than the Oracle database.

Note: These instructions assume that you have installed and configured the Oracle Database client to connect to the database in order to use it with Oracle Document Capture.

1. In the Capture Batch Setup screen, select **Other Database Platform** under Capture Database Setup options.
2. Click **Configure**.
The Configure Database Connection screen is displayed.
3. Click **Configure DB Connection**.
The Data Link Properties screen is displayed.
4. Select the Oracle Provider for OLEDB. Click **Next**.
5. In the **Data Source** field, enter an Oracle data source.
6. Enter a valid user name and password to the Oracle database server.
7. Click the **Test Connection** button to verify that Capture can access the Oracle database server.
8. Click **OK** to save the Database Connection settings.
9. Click **OK** to return to the Capture Batch Setup screen.
10. Click the **Initialize DB** button to create the table schema within the database.
A message warns that this operation erases all information in the database.

Caution: If the Capture database already exists and you are configuring a new Capture workstation only, do NOT click the **Initialize DB** button, since it will destroy all data and recreate the database schema.

Note: Whenever you initialize the database, you must delete any existing batch folders to prevent potential conflicts.

11. Click **Yes** to proceed. The Security Model screen is displayed, prompting you to select a security model.
12. Select a security model. See "[Configuring Security](#)" on page 10. You are prompted to select a database script file.

13. Select the Capture_Oracle.SQL file in the Oracle Document Capture installation folder.

3.2.2 Configuring a Microsoft Access Database

Note: Microsoft Access database use is supported in a standalone environment only. If you do choose to share a Microsoft Access database on a network, it is highly recommended that you install the NetBEUI network protocol on all workstations that will access the database, including the file server.

After installing Capture, a blank database called Capture.mdb is placed into your installation folder (for example, C:\Program Files\Oracle\Document Capture). Use this database when configuring Capture for use with a Microsoft Access database.

Follow these steps to configure a Microsoft Access database:

1. In the Capture Batch Setup screen, select **Other Database Platform** under Capture Database Setup options.
2. Click **Configure**.
The Data Link Properties screen is displayed.
3. Click **Configure DB Connection**.
The Configure Database Connection screen is displayed.
4. Select the Microsoft Jet 4.0 OLE DB Provider. Click **Next**.
5. On the Connection tab, click **Browse** under step 1. Select the Capture.mdb database file from the folder into which you installed Oracle Document Capture.
The Capture.mdb file provided does not require a user name or password.
6. Click the **Test Connection** button to verify that Capture can access the database file. Click **OK**.
7. Click **OK** to save the Database Connection settings.
8. Click **OK** to return to the Capture Batch Setup screen.
9. Click the **Initialize DB** button to create the table schema within the database. A message warns that this operation erases all information in the database.

Caution: If the Capture database already exists and you are configuring a new Capture workstation only, do NOT click the **Initialize DB** button, since it will destroy all data and recreate the database schema.

Note: Whenever you initialize the database, you must delete any existing batch folders to prevent potential conflicts.

10. Click **Yes** to proceed. The Security Model screen displays, prompting you to select a security model.

11. Select a security model. See "[Configuring Security](#)" on page 10. You are prompted to select a database script file.
12. Select the Capture_SQL.SQL file in the Oracle Document Capture installation folder.

3.2.3 Configuring a Microsoft SQL Server Database

Follow these steps to configure Capture with a Microsoft SQL Server database.

1. Contact your database administrator to create a new (blank) database on the SQL database server. The database should be at least 100MB and configured to grow dynamically to accommodate the size of the ecAudit table, which will continue to increase in size.
2. In the Capture Batch Setup screen, select **SQL Server Database Platform** under **Capture Database Setup** options.
3. In the **SQL Server Name** field, enter the computer name of the SQL Server.
4. In the **SQL Database** field, enter the name of the SQL database that the administrator created.
5. In the **User ID** and **Password** fields, enter a valid user ID and password to communicate to the database server.

Note: It is the database administrator's responsibility to configure the users that can access the Capture database.

6. Click the **Test DSN** button. You do this to verify communication to the SQL Server and Capture database.
7. Click the **Initialize DB** button to create the table schema within the database. A message warns that this operation erases all information in the database.

Caution: If the Capture database already exists and you are configuring a new Capture workstation only, do NOT click the **Initialize DB** button, because it will destroy all data and recreate the database schema.

Caution: Whenever you initialize the database, you must delete any existing batch folders to prevent potential conflicts.

8. Click **Yes** to proceed. The Security Model screen is displayed, prompting you to select a security model.
9. Select a security model. See "[Configuring Security](#)" on page 10. You are prompted to select a database script file.
10. Select the Capture_SQL.SQL file in the Oracle Document Capture installation folder.

3.3 Configuring Security

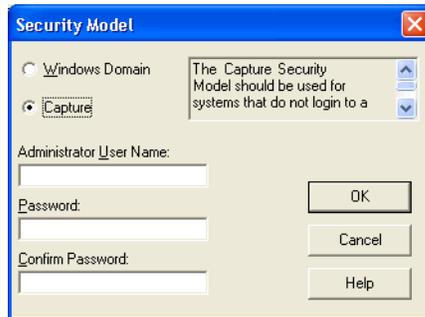
Capture offers two security models:

- **Windows Domain:** This model determines Capture rights based on the current user's domain or domain group information. An advantage of this model is that users are not required to log in each time they activate Capture. (You can require users to log in to Capture components, which allows users other than the current domain user to log in to Capture.)
- **Capture:** This model is for use by systems that do not log in to a Windows Domain or do not want to use domain security. Each time a user activates Capture or any of its components, a login screen displays, requiring the user to enter a user name and password; these values are then used to determine rights within Capture.

Note: You can change the security model used, by initializing the database. However, doing so erases all data in the database and recreates the database schema.

Follow these steps to select a security model.

1. After initializing the database (as described in "[Configuring the Capture Database](#)" on page 7), select a security model in the Security Model screen that is displayed. Choose either **Windows Domain** or **Capture**.



2. If you selected Capture security, complete the **Administrator User Name** and **Password** fields.
3. Add more users using Capture Administration options. For more information, see the section on managing Capture users in the *Administrator's Guide for Oracle Document Capture*. If you selected Windows Domain security, you can add groups to Capture as a means of quickly assigning Capture rights to all members of a domain group.

3.4 Configuring Index Settings

Follow these steps to configure settings for the Index component.

1. Select **Settings** from the System menu in the Oracle Document Capture screen. The System Settings screen is displayed.
2. In the **Index Window Font** field, select the font you want displayed to users in index fields.
3. In the **Database Location** field, specify the location of the index database.

The index database (indexing.mdb) stores index profiles. In a network environment with multiple index workstations, sharing the index database is recommended, as described in "[Configuring Index for Multiple Users](#)" on page 12.

4. If using OCR during indexing on the workstation, specify the language to be used in the **Language** field. If needed, change the character set to be used for storing OCR text in the **Code Page** field. Click **OK**.
5. Close and restart Oracle Document Capture.

3.4.1 Configuring Index for Multiple Users

Follow these steps to configure the index database as shared:

1. Copy the Indexing.mdb file from the Oracle Document Capture folder to a shared network path.
2. In the System Settings screen, change the **Database Location** field to the shared network path.
3. Close and restart Oracle Document Capture.

3.5 Configuring Language Support for OCR and Searchable PDF

Oracle Document Capture supports additional languages for OCR (Optical Character Recognition) capture, Full Text OCR output, and Searchable PDF output. In addition to English, the supported languages include: Portuguese (Brazilian), French, German, Italian, and Spanish. Note that other languages can be used, but have not been tested.

Language support is provided for these product functions:

- **OCR capture during indexing:** Capture performs OCR using the selected language for both zonal OCR capture and ad-hoc OCR (right-clicking and selecting an area).
- **Full Text OCR output upon commit:** Capture outputs the full text OCR file in the selected language.
- **Searchable PDF output upon commit:** Capture outputs documents to Searchable PDF using the selected language.

English is selected as the default language for Capture OCR and Searchable PDF. Depending on the features to be used, select the new language as described below.

- ["Configuring the Language in the Control Panel"](#) on page 12
- ["Configuring the Language for Index OCR"](#) on page 13
- ["Configuring the Language for Full Text OCR Output"](#) on page 13

3.5.1 Configuring the Language in the Control Panel

Follow these steps to select the language.

Note: This task is required for all OCR and Searchable PDF functions.

1. In the Control Panel, double-click the Regional and Language Options icon.
2. On the Regional Options tab, select a language in the **Standards and Formats** field.
3. On the Advanced tab, select a language in the **Language for non-Unicode programs** field. (You may be prompted to use the selected language's existing files on the hard drive or to copy them from another location.)

4. Restart the computer.

3.5.2 Configuring the Language for Index OCR

This task is required for index OCR only. See the Language and Code Page fields in the Settings screen, as described in "[Configuring Index Settings](#)" on page 11.

3.5.3 Configuring the Language for Full Text OCR Output

This task is required for Full Text OCR output only. Set the language to be used for creating OCR text files during commit, in each commit profile. For more information, see the section on commit profiles in the *Administrator's Guide for Oracle Document Capture*.

1. In Capture Administration, select a commit profile.
2. Click **Configure** next to the **Document Output Format** field.
3. In the Export Settings screen, select the **Perform Full Text OCR** field.
4. In the **OCR Language** field, select the language in which you want the OCR text file created.
5. In the **Code Page** field, select the character set to be used for storing OCR text, if needed.

3.6 Configuring the Servers

To configure Commit Server, Recognition Server, and Import Server, refer to their sections in the *Administrator's Guide for Oracle Document Capture*.

Each server can be run as a Windows Service rather than as a program. The main advantage of running as a service is that administrators can start or restart the service without having to log in. Refer to the *Administrator's Guide for Oracle Document Capture* for information about running a server as a service.

3.7 Configuring a Recognition Server License

Use the License Manager to add or remove a Recognition Server license from its workstation.

Note: You can use the Recognition Server component for an evaluation period subject to a valid license agreement for up to 30 days, after which you must activate its license.

3.7.1 Adding a License

Follow these steps to add a Recognition Server license to a Capture workstation. The process involves requesting a license, copying the request key Capture generates and sending the key to Oracle. After receiving a response key from Oracle, enter the key to activate the new license.

1. Display the License Manager.
Choose **License Manager Setup** from the System menu on the Oracle Document Capture screen or from the Setup menu in Recognition Server.
2. In the License Manager Setup screen, click **Request**.
3. In the License Options screen, select the Recognition Server field and click **OK**.

The Request License screen is displayed, listing your license request as a long string.

4. Click the **Copy to clipboard and close** button to copy the request key Capture generated.
5. Paste the request key into an email to Licensecodes_ww@oracle.com and send the email.

Include your company name and CSI number in the email. Oracle receives the request key email, generates a response key and emails it to you.

6. After receiving a response key from Oracle, open the License Manager and click **Activate**.
7. In the Activate License screen, paste the response key into the field provided and click **OK**.

A message displays that the license was successfully applied.

8. Restart Capture. The license change takes effect.

3.7.2 Removing a License

Follow these steps to remove the Recognition Server license from a Capture workstation. You might remove it, for example, to use it on another workstation.

1. Choose **License Manager Setup** from the System menu on the Oracle Document Capture screen or from the Setup menu in Recognition Server.
2. In the License Manager Setup screen, click **Remove**.
3. In the License Options screen, deselect the Recognition Server active license and click **OK**.
4. When prompted, restart Capture.
5. Open the License Manager and verify that the license changes took effect.

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U.S. Patent Nos. 6,094,505, 5,768,416, 5,625,465, 5,369,508 and 5,258,855.

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