

Endeca Content Acquisition System

FileNet Document and Image Services Connector Guide

Version 3.0.2 • March 2012

ORACLE®

ENDECA

Contents

- Preface.....7**
- About this guide.....7
- Who should use this guide.....7
- Conventions used in this guide.....8
- Contacting Oracle Endeca Customer Support.....8

- Chapter 1: Configuration steps for FileNet Content and Image Services.9**
- FileNet Content and Image Services versions supported by this connector.....9
- Setting up the CMS Server for FileNet Content and Image Services.....9
- Configuration properties for a FileNet Document and Image Services connector.....10
- Permission mapping.....11



Copyright and disclaimer

Copyright © 2003, 2012, Oracle and/or its affiliates. All rights reserved.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners. UNIX is a registered trademark of The Open Group.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software or hardware and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Rosette® Linguistics Platform Copyright © 2000-2011 Basis Technology Corp. All rights reserved.

Teragram Language Identification Software Copyright © 1997-2005 Teragram Corporation. All rights reserved.

Preface

Oracle Endeca's Web commerce solution enables your company to deliver a personalized, consistent customer buying experience across all channels — online, in-store, mobile, or social. Whenever and wherever customers engage with your business, the Oracle Endeca Web commerce solution delivers, analyzes, and targets just the right content to just the right customer to encourage clicks and drive business results.

Oracle Endeca Guided Search is the most effective way for your customers to dynamically explore your storefront and find relevant and desired items quickly. An industry-leading faceted search and Guided Navigation solution, Oracle Endeca Guided Search enables businesses to help guide and influence customers in each step of their search experience. At the core of Oracle Endeca Guided Search is the MDEX Engine,™ a hybrid search-analytical database specifically designed for high-performance exploration and discovery. The Endeca Content Acquisition System provides a set of extensible mechanisms to bring both structured data and unstructured content into the MDEX Engine from a variety of source systems. Endeca Assembler dynamically assembles content from any resource and seamlessly combines it with results from the MDEX Engine.

Oracle Endeca Experience Manager is a single, flexible solution that enables you to create, deliver, and manage content-rich, cross-channel customer experiences. It also enables non-technical business users to deliver targeted, user-centric online experiences in a scalable way — creating always-relevant customer interactions that increase conversion rates and accelerate cross-channel sales. Non-technical users can control how, where, when, and what type of content is presented in response to any search, category selection, or facet refinement.

These components — along with additional modules for SEO, Social, and Mobile channel support — make up the core of Oracle Endeca Experience Manager, 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 Oracle Endeca Customer Support

Oracle Endeca Customer Support provides registered users with important information regarding Oracle Endeca software, implementation questions, product and solution help, as well as overall news and updates.

You can contact Oracle Endeca Customer Support through Oracle's Support portal, My Oracle Support at <https://support.oracle.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 Oracle 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	library	(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: FILENETSHOST^FILENETSSYSTEM</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: Library^Domain^Organization <p>For example, IMS^panagonis2^MyCompany</p>
IDM Web Services URL	webServicesUrl	<p>(Required). Specify the complete URL to the Web Services for FileNet Panagon, using the following format: <i>http://Panagon Web Services server:port/directory</i> , 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