Endeca Content Acquisition System

Lotus Notes Connector Guide

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ENDECA

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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 Lotus Notes 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 Lotus Notes

To enable crawling on a Lotus Notes repository, configure the mode for the Lotus Notes connector, set up the CAS Server, and set options specific to Lotus Notes in the CAS Console for Oracle Endeca Workbench. See the "Endeca CAS API Guide" for details on crawling a Lotus Notes repository through the CAS API.

Lotus Notes versions supported by this connector

The Lotus Notes connector supports the following versions of Lotus Notes repositories:

- Lotus Notes 6.5
- Lotus Notes 7.0
- Lotus Notes 8.0
- Lotus Notes 8.5

Note: CAS can only crawl documents that are stored in folders within a repository. Documents stored outside folders are skipped during the crawl.

Configuring the Domino Lotus Notes server

To set up a Lotus Notes connector, the Domino Lotus Notes server has to run the http task and the DIIOP task.

To configure the Domino Lotus Notes server:

1. To run the http task, issue this command on the Domino server machine: `load http`
2. To run the DIIOP task, issue this command on the Domino server machine: `load diiop`
3. To automatically load the DIIOP and http tasks when the Domino server starts:
   a) Open the `notes.ini` file in the Domino program directory.
   b) Locate the line `ServerTasks=` and add `http,diiop` to the end of the line as in the example below:

      ```
      ServerTasks=Update,Replica,Router,AMgr,AdminP,CalConn,
      Sched,http,diiop
      ```

   c) Save and close the file.

4. If it was running, restart the Domino server.

Now the Lotus Notes connector is configured to use the DIIOP mode.

Before you can run the CAS Server on the Lotus Notes repository, you also need to configure the CAS Server for Lotus Notes, and specify options specific to Lotus Notes in the CAS Console.

Configuring the CAS Server for Lotus Notes

To crawl a Lotus Notes repository, configure the CAS Server for the Lotus Notes connector.

To set up a CAS Server for the Lotus Notes connector:

1. Copy the `NCSO.jar` file from the Domino server installation to the `<install path>\CAS\version\lib\cas-server-plugins\entropysoft` directory (on Windows) or `<install path>/CAS/version/lib/cas-server-plugins/entropysoft` directory (on UNIX).

   The version number of the Lotus Notes client installation must exactly match the version number of the Domino server installation from which you copy the `NCSO.jar` file.
2. Restart the Endeca CAS Service.

Now the CAS Server is set up to communicate with the Lotus Notes repository.

In order to run a crawl on a Lotus Notes repository, you also specify options specific to Lotus Notes in the CAS Console.

Configuration properties for Lotus Notes connector

To configure a Lotus Notes 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
Database Path	`databasePath`	(Required). Enter the absolute or relative path of the Notes database.
Domino Server	`serverName`	(Required). Enter the name of the Domino server where the database is located.
HTTP Port Number	`httpPort`	(Optional). Enter the port of the Domino web server or DIIOP server. If no value is added the default of 80 is used.

CAS Property Display Name	CAS Property Name	Property Description
QuickPlace	`quickplace`	(Optional). Include this option if the Notes database being accessed is an IBM Lotus QuickPlace or IBM Lotus Quickr database. If set to true, the settings for "Content strategy" and "RFC 822 strategy" are ignored. The default is `false`.
Keep Rich Text	`keepRichTextProperties`	(Optional). The default is `false`. If set to `true`, rich-text fields are returned as properties, otherwise they are ignored.
Content Strategy	`contentStrategy`	(Optional). Select the strategy to use for document content. The various strategies are: • `text` • `htmlBody` • `attachments` • `textAndAttachments` (This is the default). • `htmlAndAttachments`
RFC 822 Strategy	`rfc822Strategy`	(Optional). The default is `false`. If set to `true`, the server makes an attempt to reconstruct the original RFC 822 message and return it as content. If the document is not in RFC 822 format, the strategy specified by `contentStrategy` is used instead.
Display Views	`displayViews`	(Optional). Comma-separated names of views/folders that should be made available by the connector even if they are normally hidden.

Note: Properties are case sensitive.

Permission mapping

The following table shows the mapping between Lotus Notes permissions and the resulting Endeca record properties that are produced.

Lotus Notes permission	Endeca record properties
Reader	`Endeca.CMS.AllowReadProperties` `Endeca.CMS.AllowReadContent`
Author	`Endeca.CMS.AllowReadProperties` `Endeca.CMS.AllowReadContent`
Manager	`Endeca.CMS.AllowReadProperties` `Endeca.CMS.AllowReadContent`