

Distributed Connector

Software Version 12.6

Administration Guide



Document Release Date: June 2020
Software Release Date: June 2020

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Chapter 1: Introduction

This section provides an overview of the Micro Focus Distributed Connector.

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- [The IDOL Platform](#) 6
- [System Architecture](#) 7

Distributed Connector

The Distributed Connector takes requests from applications and distributes them to a connector or group of connectors. The Distributed Connector is used to distribute the actions (`Collect`, `Hold` and so on) between a number of connectors. If no documents are supplied in a query, the Distributed Connector can query IDOL.

The Distributed Connector might be used for the following reasons:

- To provide redundancy (if a connector stops responding, another connector can take its place).
- For load balancing (actions can be distributed between connectors to improve performance).
- To perform actions on documents, by taking query results from IDOL and passing actions to the relevant connectors. For example, a legal application might send a query to the Distributed Connector. The Distributed Connector then forwards the query to IDOL Server. IDOL returns documents that match the query, and the Distributed Connector sends this information to the relevant connectors to perform an action on the documents (for example *collect* or *hold*).

Connector Groups

When a connector registers with a Distributed Connector, it must join a connector group. A *connector group* is a group of similar connectors. The connectors in a group must be of the same type (for example, all HTTP Connectors), and must be able to access the same repository.

The Distributed Connector can handle multiple connector groups simultaneously. For example, you might create a group called “FilesystemConnectors”, and a group called “HTTPConnectors”.

The connectors in a connector group perform the fetch tasks configured in their configuration files. When a connector runs the synchronize action, information about the extracted files is stored in a datastore file. The connector then uploads the file to the Distributed Connector, or saves the file in a shared location. This means that when the Distributed Connector distributes synchronize actions to another connector, that connector can access the information from the original connector’s datastore.

When the Distributed Connector receives an action, for example *Collect* or *View*, the connector group to use is specified in the action command. If the connector group is not specified, the Distributed Connector attempts to find the document identifier in IDOL so that it can determine which connector

group to use. If no connector group is specified in the action, and the group cannot be found in IDOL Server, the action fails.

Display Online Help

You can display the Distributed Connector Reference by sending an action from your web browser. The Distributed Connector Reference describes the actions and configuration parameters that you can use with Distributed Connector.

For Distributed Connector to display help, the help data file (`help.dat`) must be available in the installation folder.

To display help for Distributed Connector

1. Start Distributed Connector.
2. Send the following action from your web browser:

```
http://host:port/action=Help
```

where:

host is the IP address or name of the machine on which Distributed Connector is installed.

port is the ACI port by which you send actions to Distributed Connector (set by the `Port` parameter in the [Server] section of the configuration file).

For example:

```
http://12.3.4.56:9000/action=help
```

OEM Certification

Distributed Connector works in OEM licensed environments.

The IDOL Platform

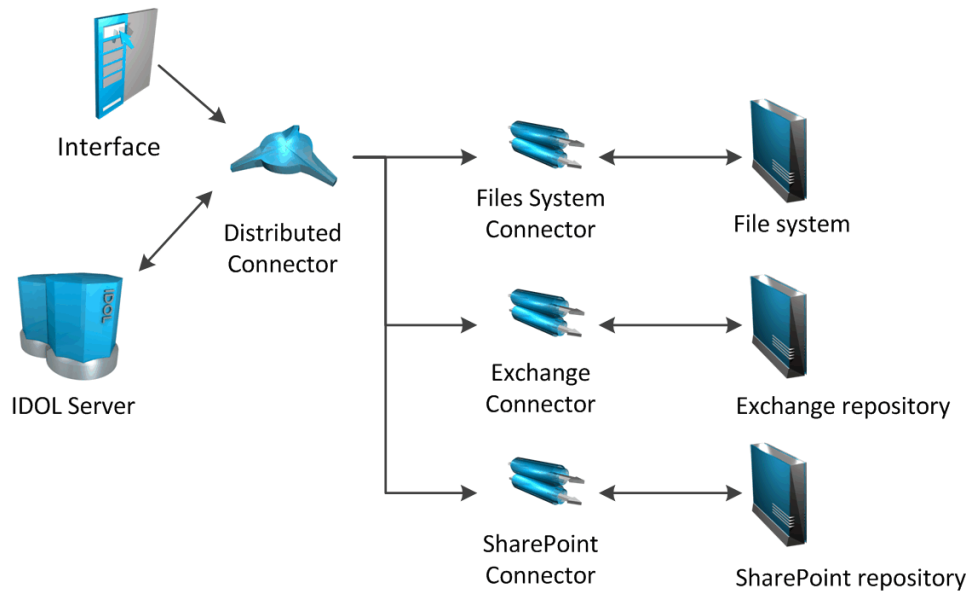
At the core of Distributed Connector is the *Intelligent Data Operating Layer* (IDOL).

IDOL gathers and processes unstructured, semi-structured, and structured information in any format from multiple repositories using IDOL connectors and a global relational index. It can automatically form a contextual understanding of the information in real time, linking disparate data sources together based on the concepts contained within them. For example, IDOL can automatically link concepts contained in an email message to a recorded phone conversation, that can be associated with a stock trade. This information is then imported into a format that is easily searchable, adding advanced retrieval, collaboration, and personalization to an application that integrates the technology.

For more information on IDOL, see the *IDOL Getting Started Guide*.

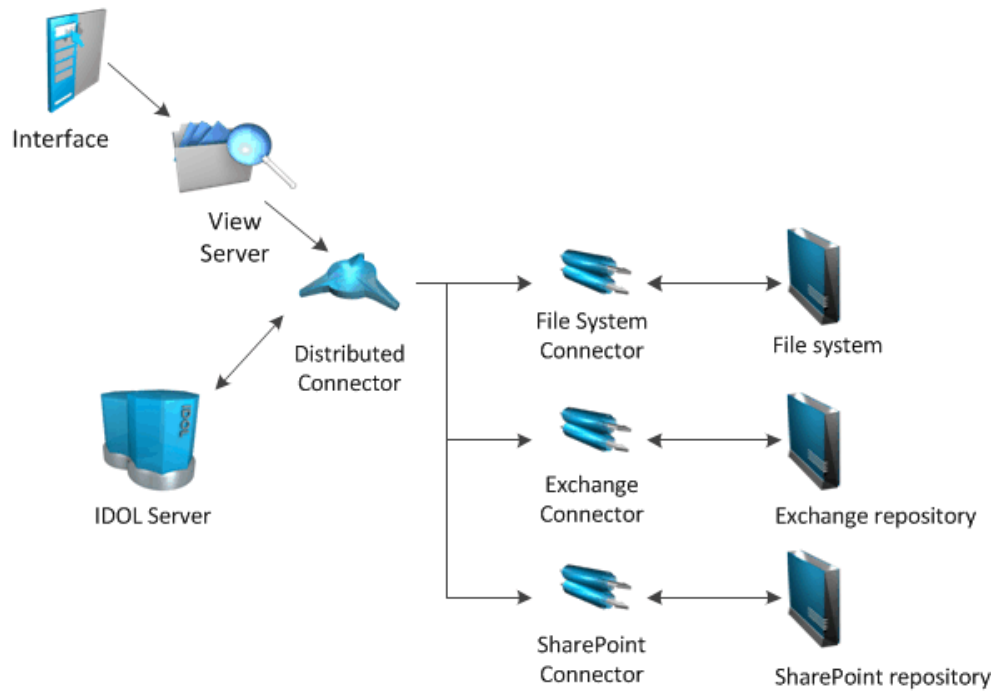
System Architecture

The following diagram shows how a Distributed Connector might be used to retrieve documents from multiple repositories.



1. An interface sends a query to the Distributed Connector.
2. If the query does not specify the documents that are required (using document identifiers), the Distributed Connector sends a query to IDOL Server.
3. The Distributed Connector sends actions to the relevant connectors to retrieve the documents.

The following diagram shows how a Distributed Connector might be used when viewing documents.



1. An interface sends a view action to the view server.
2. The view server sends the action to the Distributed Connector.
3. The Distributed Connector sends a query to IDOL Server to find the connector group that retrieved the document. The Distributed Connector requires this information so that it can send the action to the same connector group.
4. The Distributed Connector sends the action to the correct connector group, which returns the document so that it can be displayed in the interface.

Chapter 2: Install Distributed Connector

This section describes how to install the Distributed Connector.

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- [Install Distributed Connector](#) 9

System Requirements

The Distributed Connector should be installed by the system administrator as part of a larger system that includes an IDOL server and an interface for the information stored in IDOL server.

For information about the minimum system requirements required to run IDOL components, including Distributed Connector, refer to the *IDOL Getting Started Guide*.

Install Distributed Connector

The Distributed Connector is supplied as a zip package. Unzip the files to your chosen installation directory.

Chapter 3: Configure Distributed Connector

This section describes how to configure the Distributed Connector.

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Distributed Connector Configuration File

You can configure the Distributed Connector by editing the configuration file. The configuration file (`DistributedConnector.cfg`) is located in the Distributed Connector's installation folder. The file can be modified using a text editor.

The Distributed Connector configuration file contains the following sections.

Service Section

The `[Service]` section specifies the service port of the Distributed Connector.

Server Section

The `[Server]` section specifies the ACI port of the Distributed Connector.

Idol Section

The `[Idol]` section contains parameters that specify information about the IDOL server to query against.

```
[Idol]
IdolHost=localhost
IdolPort=9000
```

DistributedConnector Section

The [DistributedConnector] section contains parameters related to the Distributed Connector itself.

```
[DistributedConnector]
DocQueryBatchSize=1000
ConnectorTimeoutSecs=60
DataStoreLocation=.\DistributedConnector.db
```

Logging Section

The [Logging] section contains configuration parameters that determine how messages are logged. You can create separate log streams for different message types. The configuration file also contains a section to configure each of the log streams.

Related Topics

- [Customize Logging, on page 16](#)

Modify Configuration Parameter Values

You modify Distributed Connector configuration parameters by directly editing the parameters in the configuration file. When you set configuration parameter values, you must use UTF-8.

CAUTION: You must stop and restart Distributed Connector for new configuration settings to take effect.

This section describes how to enter parameter values in the configuration file.

Enter Boolean Values

The following settings for Boolean parameters are interchangeable:

TRUE = true = ON = on = Y = y = 1

FALSE = false = OFF = off = N = n = 0

Enter String Values

To enter a comma-separated list of strings when one of the strings contains a comma, you can indicate the start and the end of the string with quotation marks, for example:

ParameterName=cat,dog,bird,"wing,beak",turtle

Alternatively, you can escape the comma with a backslash:

ParameterName=cat,dog,bird,wing\,beak,turtle

If any string in a comma-separated list contains quotation marks, you must put this string into quotation marks and escape each quotation mark in the string by inserting a backslash before it. For example:

```
ParameterName="<font face=\"arial\" size=\"+1\"><b>\", \"<p>\"
```

Here, quotation marks indicate the beginning and end of the string. All quotation marks that are contained in the string are escaped.

Include an External Configuration File

You can share configuration sections or parameters between ACI server configuration files. The following sections describe different ways to include content from an external configuration file.

You can include a configuration file in its entirety, specified configuration sections, or a single parameter.

When you include content from an external configuration file, the `GetConfig` and `ValidateConfig` actions operate on the combined configuration, after any external content is merged in.

In the procedures in the following sections, you can specify external configuration file locations by using absolute paths, relative paths, and network locations. For example:

```
../sharedconfig.cfg  
K:\sharedconfig\sharedsettings.cfg  
\\example.com\shared\idol.cfg  
file://example.com/shared/idol.cfg
```

Relative paths are relative to the primary configuration file.

NOTE: You can use nested inclusions, for example, you can refer to a shared configuration file that references a third file. However, the external configuration files must not refer back to your original configuration file. These circular references result in an error, and Distributed Connector does not start.

Similarly, you cannot use any of these methods to refer to a different section in your primary configuration file.

Include the Whole External Configuration File

This method allows you to import the whole external configuration file at a specified point in your configuration file.

To include the whole external configuration file

1. Open your configuration file in a text editor.
2. Find the place in the configuration file where you want to add the external configuration file.
3. On a new line, type a left angle bracket (<), followed by the path to and name of the external configuration file, in quotation marks (""). You can use relative paths and network locations. For

example:

```
< "K:\sharedconfig\sharedsettings.cfg"
```

4. Save and close the configuration file.

Include Sections of an External Configuration File

This method allows you to import one or more configuration sections (including the section headings) from an external configuration file at a specified point in your configuration file. You can include a whole configuration section in this way, but the configuration section name in the external file must exactly match what you want to use in your file. If you want to use a configuration section from the external file with a different name, see [Merge a Section from an External Configuration File, on the next page](#).

To include sections of an external configuration file

1. Open your configuration file in a text editor.
2. Find the place in the configuration file where you want to add the external configuration file section.
3. On a new line, type a left angle bracket (<), followed by the path of the external configuration file, in quotation marks (""). You can use relative paths and network locations. After the configuration file path, add the configuration section name that you want to include. For example:

```
< "K:\sharedconfig\extrasettings.cfg" [License]
```

NOTE: You cannot include a section that already exists in your configuration file.

4. Save and close the configuration file.

Include Parameters from an External Configuration File

This method allows you to import one or more parameters from an external configuration file at a specified point in your configuration file. You can import a single parameter or use wildcards to specify multiple parameters. The parameter values in the external file must match what you want to use in your file. This method does not import the section heading, such as [License] in the following examples.

To include parameters from an external configuration file

1. Open your configuration file in a text editor.
2. Find the place in the configuration file where you want to add the parameters from the external configuration file.
3. On a new line, type a left angle bracket (<), followed by the path of the external configuration file, in quotation marks (""). You can use relative paths and network locations. After the configuration file path, add the name of the section that contains the parameter, followed by the parameter name. For example:

```
< "license.cfg" [License] LicenseServerHost
```

To specify a default value for the parameter, in case it does not exist in the external configuration file, specify the configuration section, parameter name, and then an equals sign (=) followed by the default value. For example:

```
< "license.cfg" [License] LicenseServerHost=localhost
```

You can use wildcards to import multiple parameters, but this method does not support default values. The * wildcard matches zero or more characters. The ? wildcard matches any single character. Use the pipe character | as a separator between wildcard strings. For example:

```
< "license.cfg" [License] LicenseServer*
```

4. Save and close the configuration file.

Merge a Section from an External Configuration File

This method allows you to include a configuration section from an external configuration file as part of your Distributed Connector configuration file. For example, you might want to specify a standard SSL configuration section in an external file and share it between several servers. You can use this method if the configuration section that you want to import has a different name to the one you want to use.

To merge a configuration section from an external configuration file

1. Open your configuration file in a text editor.
2. Find or create the configuration section that you want to include from an external file. For example:

```
[SSLOptions1]
```

3. After the configuration section name, type a left angle bracket (<), followed by the path to and name of the external configuration file, in quotation marks (""). You can use relative paths and network locations. For example:

```
[SSLOptions1] < "../sharedconfig/ssloptions.cfg"
```

If the configuration section name in the external configuration file does not match the name that you want to use in your configuration file, specify the section to import after the configuration file name. For example:

```
[SSLOptions1] < "../sharedconfig/ssloptions.cfg" [SharedSSLOptions]
```

In this example, Distributed Connector uses the values in the [SharedSSLOptions] section of the external configuration file as the values in the [SSLOptions1] section of the Distributed Connector configuration file.

NOTE: You can include additional configuration parameters in the section in your file. If these parameters also exist in the imported external configuration file, Distributed Connector uses the values in the local configuration file. For example:

```
[SSLOptions1] < "ssloptions.cfg" [SharedSSLOptions]  
SSLCACertificatesPath=C:\IDOL\HTTPConnector\CACERTS\
```

4. Save and close the configuration file.

Configure Client Authorization

You can configure Distributed Connector to authorize different operations for different connections.

Authorization roles define a set of operations for a set of users. You define the operations by using the `StandardRoles` configuration parameter, or by explicitly defining a list of allowed actions in the `Actions` and `ServiceActions` parameters. You define the authorized users by using a client IP address, SSL identities, and GSS principals, depending on your security and system configuration.

For more information about the available parameters, see the *Distributed Connector Reference*.

IMPORTANT: To ensure that Distributed Connector allows only the options that you configure in `[AuthorizationRoles]`, make sure that you delete any deprecated `RoleClients` parameters from your configuration (where `Role` corresponds to a standard role name, for example `AdminClients`).

To configure authorization roles

1. Open your configuration file in a text editor.
2. Find the `[AuthorizationRoles]` section, or create one if it does not exist.
3. In the `[AuthorizationRoles]` section, list the user authorization roles that you want to create. For example:

```
[AuthorizationRoles]  
0=AdminRole  
1=UserRole
```

4. Create a section for each authorization role that you listed. The section name must match the name that you set in the `[AuthorizationRoles]` list. For example:

```
[AdminRole]
```

5. In the section for each role, define the operations that you want the role to be able to perform. You can set `StandardRoles` to a list of appropriate values, or specify an explicit list of allowed actions by using `Actions`, and `ServiceActions`. For example:

```
[AdminRole]  
StandardRoles=Admin,ServiceControl,ServiceStatus
```

```
[UserRole]  
Actions=GetVersion  
ServiceActions=GetStatus
```

NOTE: The standard roles do not overlap. If you want a particular role to be able to perform all actions, you must include all the standard roles, or ensure that the clients, SSL identities, and so on, are assigned to all relevant roles.

6. In the section for each role, define the access permissions for the role, by setting `Clients`, `SSLIdentities`, and `GSSPrincipals`, as appropriate. If an incoming connection matches one of the allowed clients, principals, or SSL identities, the user has permission to perform the operations allowed by the role. For example:

```
[AdminRole]
StandardRoles=Admin,ServiceControl,ServiceStatus
Clients=localhost
SSLIdentities=admin.example.com
```

7. Save and close the configuration file.
8. Restart Distributed Connector for your changes to take effect.

IMPORTANT: If you do not provide any authorization roles for a standard role, Distributed Connector uses the default client authorization for the role (`localhost` for `Admin` and `ServiceControl`, all clients for `Query` and `ServiceStatus`). If you define authorization only by actions, Micro Focus recommends that you configure an authorization role that disallows all users for all roles by default. For example:

```
[ForbidAllRoles]
StandardRoles=*
Clients=""
```

This configuration ensures that Distributed Connector uses only your action-based authorizations.

Customize Logging

You can customize logging by setting up your own *log streams*. Each log stream creates a separate log file in which specific log message types (for example, action, index, application, or import) are logged.

To set up log streams

1. Open the Distributed Connector configuration file in a text editor.
2. Find the `[Logging]` section. If the configuration file does not contain a `[Logging]` section, add one.
3. In the `[Logging]` section, create a list of the log streams that you want to set up, in the format `N=LogStreamName`. List the log streams in consecutive order, starting from 0 (zero). For example:

```
[Logging]
LogLevel=FULL
LogDirectory=logs
```



```
0=ApplicationLogStream  
1=ActionLogStream
```

You can also use the [Logging] section to configure any default values for logging configuration parameters, such as LogLevel. For more information, see the *Distributed Connector Reference*.

4. Create a new section for each of the log streams. Each section must have the same name as the log stream. For example:

```
[ApplicationLogStream]  
[ActionLogStream]
```

5. Specify the settings for each log stream in the appropriate section. You can specify the type of logging to perform (for example, full logging), whether to display log messages on the console, the maximum size of log files, and so on. For example:

```
[ApplicationLogStream]  
LogTypeCSVs=application  
LogFile=application.log  
LogHistorySize=50  
LogTime=True  
LogEcho=False  
LogMaxSizeKBs=1024
```

```
[ActionLogStream]  
LogTypeCSVs=action  
LogFile=logs/action.log  
LogHistorySize=50  
LogTime=True  
LogEcho=False  
LogMaxSizeKBs=1024
```

6. Save and close the configuration file. Restart the service for your changes to take effect.

Example Configuration File

```
[Server]  
Port=10000
```

```
[Service]  
ServicePort=10002
```

```
[AuthorizationRoles]  
0=AdminRole  
1=QueryRole
```

```
[AdminRole]  
StandardRoles=admin,servicecontrol,query,servicestatus  
Clients=:1,127.0.0.1  
//SSLIdentities=  
//GSSPrincipals=
```

```
[QueryRole]
StandardRoles=query, servicestatus
Clients=*
//SSLIdentities=
//GSSPrincipals=

[Idol]
IdolHost=localhost
IdolPort=9000

[DistributedConnector]
DocQueryBatchSize=1000
ConnectorTimeoutSecs=60
DataStoreLocation=.\DistributedConnector.db

[Logging]
LogArchiveDirectory=archive
LogDirectory=logs
LogTime=TRUE
LogEcho=FALSE
LogLevel=DEBUG
LogExpireAction=Datestamp
LogOldAction=move
MaxLogSizeKbs=10240

0=application
1=action
2=connectorstore
3=jobstore

[application]
LogFile=application.log
LogTypeCSVs=application

[action]
LogFile=action.log
LogTypeCSVs=action

[connectorstore]
LogFile=connectorstore.log
LogTypeCSVs=connectorstore

[jobstore]
LogFile=jobstore.log
LogTypeCSVs=jobstore
```

Chapter 4: Start and Stop Distributed Connector

The following sections describe how to start and stop Distributed Connector.

- [Start the Distributed Connector](#)19
- [Stop the Distributed Connector](#)20

Start the Distributed Connector

After you have installed and configured the Distributed Connector, you are ready to run it. Start the Distributed Connector using one of the following methods.

Windows

To start the Distributed Connector on Windows, follow these steps.

To start the Distributed Connector using Windows Services

1. Open the Windows Services dialog box.
2. Select the **DistributedConnector** service, and click **Start**.
3. Close the Windows Services dialog box.

UNIX

To start the Distributed Connector on a UNIX operating system, follow these steps.

To start the Distributed Connector using the UNIX Start script

1. Change to the Installation directory.
2. Enter the following command:

```
./startconnector.sh
```
3. If you want to check the Distributed Connector service is running, enter the following command:

```
ps -aef | grep ConnectorInstallName
```

This command returns the Distributed Connector service process ID number if the service is running.

Stop the Distributed Connector

You should stop the Distributed Connector before making any changes to the configuration file. To stop the Distributed Connector, use one of the following methods.

To stop the Distributed Connector using Windows Services

1. Open the Windows Services dialog box.
2. Select the **DistributedConnector** service, and click **Stop**.
3. Close the Windows Services dialog box.

To stop the Distributed Connector by sending an action to the service port

- Type the following command in the address bar of your web browser:

`http://host:ServicePort/action=stop`

host The IP address or host name of the machine where the Distributed Connector is running.

ServicePort The Distributed Connector service port (specified in the [Service] section of the configuration file).

Glossary

A

ACI (Autonomy Content Infrastructure)

A technology layer that automates operations on unstructured information for cross-enterprise applications. ACI enables an automated and compatible business-to-business, peer-to-peer infrastructure. The ACI allows enterprise applications to understand and process content that exists in unstructured formats, such as email, Web pages, Microsoft Office documents, and IBM Notes.

ACI Server

A server component that runs on the Autonomy Content Infrastructure (ACI).

ACL (access control list)

An ACL is metadata associated with a document that defines which users and groups are permitted to access the document.

action

A request sent to an ACI server.

active directory

A domain controller for the Microsoft Windows operating system, which uses LDAP to authenticate users and computers on a network.

C

Category component

The IDOL Server component that manages categorization and clustering.

Community component

The IDOL Server component that manages users and communities.

connector

An IDOL component (for example File System Connector) that retrieves information from a local or remote repository (for example, a file system, database, or Web site).

Connector Framework Server (CFS)

Connector Framework Server processes the information that is retrieved by connectors. Connector Framework Server uses KeyView to extract document content and metadata from over 1,000 different file types. When the information has been processed, it is sent to an IDOL Server or Distributed Index Handler (DIH).

Content component

The IDOL Server component that manages the data index and performs most of the search and retrieval operations from the index.

D

DAH (Distributed Action Handler)

DAH distributes actions to multiple copies of IDOL Server or a component. It allows you to use failover, load balancing, or distributed content.

DIH (Distributed Index Handler)

DIH allows you to efficiently split and index extremely large quantities of data into multiple copies of IDOL Server or the Content component. DIH allows you to create a scalable solution that delivers high performance and high availability. It provides a flexible way to batch, route, and categorize the indexing of internal and external content into IDOL Server.

I

IDOL

The Intelligent Data Operating Layer (IDOL) Server, which integrates unstructured, semi-structured and structured information from multiple repositories through an understanding of the content. It delivers a real-time environment in which operations across applications and content are automated.

IDOL Proxy component

An IDOL Server component that accepts incoming actions and distributes them to the appropriate subcomponent. IDOL Proxy also performs some maintenance operations to make sure that the subcomponents are running, and to start and stop them when necessary.

Intellectual Asset Protection System (IAS)

An integrated security solution to protect your data. At the front end, authentication checks that users are allowed to access the system that contains the result data. At the back end, entitlement checking and authentication combine to ensure that query results contain only documents that the user is allowed to see, from repositories that the user has permission to access. For more information, refer to the IDOL Document Security Administration Guide.

K

KeyView

The IDOL component that extracts data, including text, metadata, and subfiles from over 1,000 different file types. KeyView can also convert documents to HTML format for viewing in a Web browser.

L

LDAP

Lightweight Directory Access Protocol. Applications can use LDAP to retrieve information from a server. LDAP is used for directory services (such as corporate email and telephone directories) and user authentication. See also: active directory, primary domain controller.

License Server

License Server enables you to license and run multiple IDOL solutions. You must have a License Server on a machine with a known, static IP address.

O

OmniGroupServer (OGS)

A server that manages access permissions for your users. It communicates with your repositories and IDOL Server to apply access permissions to documents.

P

primary domain controller

A server computer in a Microsoft Windows domain that controls various computer resources. See also: active directory, LDAP.

V

View

An IDOL component that converts files in a repository to HTML formats for viewing in a Web browser.

W

Wildcard

A character that stands in for any character or group of characters in a query.

X

XML

Extensible Markup Language. XML is a language that defines the different attributes of document content in a format that can be read by humans and machines. In IDOL Server, you can index documents in XML format. IDOL Server also returns action responses in XML format.

Send documentation feedback

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Feedback on Administration Guide (Micro Focus Distributed Connector 12.6)

Add your feedback to the email and click **Send**.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to swpdl.idoldocsfeedback@microfocus.com.

We appreciate your feedback!