



Aprimo Marketing Operations Adobe Experience Manager Connector Guide

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1. Introduction

The Adobe Experience Manager connector enables you to seamlessly pass attachments and associated metadata that have been reviewed and approved in Aprimo's productivity workflow tool to be sent to Adobe Experience Manager.

Work in progress assets are reviewed and approved in Aprimo, then are automatically pushed to Adobe Experience Manager for asset management.



Below is a sample conceptual workflow that can be implemented using Aprimo's productivity tools and the AEM connector. Attachments are sent to AEM at any point in your workflow that you choose, giving you full flexibility to choose at what point in your workflow process is the right time to send attachments to AEM.



2. Workflow Configuration

The AEM connector allows you to control when attachments are pushed to AEM via a new status action available in your workflow designer. When the AEM connector is turned on, you'll see a new status

action called “Send Attachment(s) to External DAM” available on your workflow steps. By checking this, when that status action fires, all attachments that are configured on the Document Layout tab will be sent to AEM. Only the latest version of the attachment will be sent, and only attachments of type ‘uploaded file’ will be sent (internet and website files will not be sent to AEM). Once an attachment is successfully sent to AEM, the ‘Locator URL’ field will be populated with a link to the AEM asset.

If you need assistance understanding the Document Layout tab, please contact your Aprimo account manager to speak to an Aprimo workflow expert.

Step: Send to AEM

aprimo

AEM Test: Send to AEM

[Details](#)
[Page Layout](#)
[Document Layout](#)
[Input Ports](#)
[Output Ports](#)
[Status Actions](#)
[Notification](#)

Reset Baseline

Integration Callouts

Integration Callout Type

[+ Add Integration Callout](#)

Set Activity Type Status

Activity Type	Activity Type Status
Customer Call	<Do Not Change>
Direct Mail	<Do Not Change>
Email	<Do Not Change>
Mobile	<Do Not Change>
Trade Show	<Do Not Change>
Type 1	<Do Not Change>
Type 2	<Do Not Change>
Type 3	<Do Not Change>
Type 4	<Do Not Change>
Type 5	<Do Not Change>
Web Ad	<Do Not Change>

Send Attachment(s) to External DAM

Server: LAB16G100SNG001; *Total Page Time: 10.88 (*Processing Time: 10.25, Client Time: 0.33) - Commands: 241, Duration: 955 Max Number of Rows: 22 Total Number of Rows: 429

3. Versioning

If an attachment with the same folder path and filename is sent to AEM a subsequent time, AEM will treat this as a new rendition of the file. If a new version of the same file is pushed to a new folder, AEM will treat it as the initial rendition of the file.

4. Metadata Configuration

When an attachment is pushed to AEM, base or EA fields at the activity, project, or attachment level may be associated with the resulting asset in AEM. During activation, an Aprimo consultant will provide a connector workbook that allows you to specify which metadata will map over into AEM.

The format of Date and DateTime fields sent to AEM is configurable. The integration supports all datatypes that can be configured in Aprimo except for multi-selects.

Important! Any picklists that are being mapped between Aprimo and AEM MUST have the same text options in order to be set (and matched during search). Fields being mapped between the two systems must be configured with compatible datatypes.

5. Folder Path Configuration

AEM organizes its assets by a folder structure. Your folder structure can be configured by using Activity, Project, and Attachment EA values to form a string. This is set globally for the integration. Empty path nodes may also be defaulted if no value is set.

There are also two special functions that can be configured as part of the folder path:

- Create a folder path node based on the year (e.g. 2017) the Activity is created.
- Create a folder path node based on the quarter (e.g. Q3) the Activity is created.

For some examples, see the table below, assuming the path template is set up to be: {Activity Title}/{Project Name}/{Project EA 132}.

Activity Title Value	Project Name Value	Project EA 132 Value	Project EA 132 Default	Resulting path
2017 Promos	Asset Production	Fall	Not Seasonal	2017 Promos/Asset Production/Fall
2017 Promos	Asset Production	Spring	Not Seasonal	2017 Promos/Asset Production/Spring
2017 Promos	Asset Production		Not Seasonal	2017 Promos/Asset Production/Not Seasonal

6. Aprimo EA Configuration

This integration relies on 2 EAs that must be configured during activation:

Name	Object	Description	Data Type
Locator URL	Attachment	URL of the AEM asset	URL
AEM Synced	Project	Presence of this (date) flag indicates that all Attachments on a Task have been successfully transferred to AEM	DateTime

7. Search for AEM Assets from Within Aprimo

Assets that already exist in AEM can be referenced as Attachments within Aprimo – as ‘Internet File’ Attachments. From within a workflow task that requests a file upload, click the link to add a document (if this link turns into a dropdown selector, choose ‘Internet File’), which will open the Attachment Upload page. Click the ‘Search DAM’ to open the search form.

The screenshot shows the 'Attachment: New Attachment' form. At the top, there are navigation icons and the user name 'jwallace'. Below that, there are tabs: 'SPELL CHECK', 'PROMOTE', 'VIEW ANNOTATIONS', 'NEW VERSION', and 'DELETE'. The main title is 'Test Activity: New Attachment'. On the right side, there are buttons: 'SEARCH DAM' (highlighted with a red box), 'RESET', 'CANCEL', and 'SAVE'. The form fields include:

- Title:** A text input field with a note: 'If multiple files are selected, file names are appended to the title'.
- Description:** A text area with up and down arrow icons.
- Group:** A dropdown menu set to '< None >' with an 'Add' button.
- Type:** A dropdown menu set to 'Attach Type alpha'.
- Create Attachment from:** A dropdown menu set to 'Internet File'.
- Internet File:** A text input field containing 'http://'. Above this field is a grey box labeled 'Location'.

 At the bottom, there is a status bar: 'Server: lab16g114sng001; Total Page Time: 7.34 (Processing Time: 0.83, Client Time: 3.67) - Commands: 131, Duration: 218 Max Number of Rows: 54 Total Number of Rows: 343'.

The search form contains controls for the metadata items that have been configured to appear on the search form. Note: the ‘Keyword’ control is always present, but all other controls are configurable. The Date range controls appear when the configuration contains a value for the AEM Search Date Field Name (if this is not specified, the search function would not know which AEM field to search against).

The search function matches on ALL items specified in the search form. In the example below, the search would only return items containing the keyword ‘final’ AND have an AEM Date after 09/04/2017 AND have an AEM date before 09/13/2017 (the AEM field the dates correspond to is configurable).

The screenshot shows the 'Search DAM' form. At the top, there are navigation icons and the user name 'jwallace'. Below that, there are tabs: 'SPELL CHECK'. The main title is 'Search DAM'. On the right side, there is a 'SEARCH' button (highlighted with a red box). The form fields include:

- Search/Keyword:** A text input field containing 'final'.
- Activity Owner:** A dropdown menu set to '< None >'.
- Start Date:** A date input field containing '09/04/2017'.
- End Date:** A date input field containing '09/13/2017'.
- Title:** A text input field.
- Description:** A text input field.

 At the bottom, there is a status bar: 'Server: lab16g114sng001; Total Page Time: 7.34 (Processing Time: 0.83, Client Time: 3.67) - Commands: 131, Duration: 218 Max Number of Rows: 54 Total Number of Rows: 343'.

Once the search terms have been filled in, click the ‘Search’ button. This retrieves matching asset URLs from AEM, along with thumbnails, title, description, and a selector button next to each returned asset.

	Thumbnail	Title	Description
<input checked="" type="radio"/>		Jedi Lightsaber large	Jedi Lightsaber large
<input type="radio"/>		Jedi vs a Jar of dirt	Jedi vs a Jar of dirt
<input type="radio"/>		Capt Jack talk to a Jedi	Capt Jack talk to a Jedi

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If you want to reference one of the AEM assets returned, select the radio button next to the desired asset and click the 'Submit' button. This will close the AEM Search screen and automatically populate the AEM asset as an Internet File on the base Aprimo Attachment Upload screen (above, highlighted in green).

8. Transaction Logging

A Transaction Log is available to view all integration activity under System Administration → System Tools → Integration → Transaction Log. From here, any transactions that have failed to be sent may be retried to be sent to AEM. A system administrator can also be configured to receive notifications in the event of a failure.

The Transaction Log can also be used to investigate data being sent to AEM, as well as displaying details of any errors returned from AEM.

9. AEM Configuration Requirements

- Adobe Experience Manager 6.2 is supported.
- The AEM REST API will need to be exposed to the Aprimo Cloud.
- A username and password must be provided to Aprimo which grants the proper write access to the folders that Aprimo's connector will write to.
- The AEM fields being mapped from Aprimo must be configured with compatible datatypes.
- AEM should be configured to return thumbnails if thumbnails are desirable on search results.