

# **Oracle® Endeca Information Discovery**

Migration Guide

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## Preface

Oracle® Endeca Information Discovery Studio is an enterprise data discovery platform for advanced, yet intuitive, exploration and analysis of complex and varied data.

Information is loaded from disparate source systems and stored in a faceted data model that dynamically supports changing data. This integrated and enriched data is made available for search, discovery, and analysis via interactive and configurable applications. Oracle Information Discovery Studio includes a Provisioning Service that allows you to upload data directly from spreadsheet files.

Oracle Endeca Information Discovery Studio enables an iterative “model-as-you-go” approach that simultaneously frees IT from the burdens of traditional data modeling and supports the broad exploration and analysis needs of business users.

## About this guide

This guide helps you upgrade your Oracle Information Discovery implementation by describing the major changes between versions 2.3.x and 2.4.x.

## Who should use this guide

This guide is intended for system administrators and developers who are upgrading Oracle Endeca Information Discovery on Windows or Linux.

For Studio, this guide is intended for users whose Studio applications are built using standard Studio components. It does not necessarily apply to Studio applications built with custom components.

## Contacting Oracle Customer Support

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

You can contact Oracle Customer Support through Oracle's Support portal, My Oracle Support at <https://support.oracle.com>.



## Chapter 1

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# Upgrading to Oracle Endeca Information Discovery Version 2.4.x

This section provides instructions for upgrading to Oracle Endeca Information Discovery 2.4.x. Before you start the upgrade processes, check the remaining sections of this guide to learn about the changes that will affect you during or after an upgrade.

[Required reading](#)

[High-level upgrade procedure](#)

[Upgrading Integrator](#)

[Upgrading Studio](#)

## Required reading

In addition to reading this document, it is recommended that you read the following documents for important information about the release.

### Release Announcement

The Release Announcement outlines the new features that were added in version 2.4.x.

### Release Notes

The Release Notes for each package provide information about known issues and bug fixes for this release.

### Installation Guide

The *Oracle Endeca Information Discovery Installation Guide* provides an overview of the components and includes information about configuration scenarios. It contains installation instructions for each component, and information on how to verify your installation.

## High-level upgrade procedure

This topic provides the recommended order for upgrading to version 2.4.x.

The upgrade process assumes you need to install the components on dedicated servers. Because of this, the upgrade process references installation instructions for each component, and does not utilize the All-in-One Installer. The All-in-One installer is intended for single-server development environments only, and should be used with the Quick Start project.

The upgrade process includes separate upgrade procedures for Integrator and Studio. In addition, as part of the upgrade, you need to make changes to the existing pre-upgrade graphs so that you can run these graphs in Integrator after the upgrade, and load data and configuration to the Oracle Endeca Server data store.

The following procedure provides high-level steps for the entire upgrade process. See the individual topics in this section for detailed instructions in each step.

To upgrade to Oracle Endeca Information Discovery release version 2.4.x:

1. Make sure that Oracle Endeca Server 7.4 is installed and started.



**Note:** Remove any previous version of Endeca Server before installing 7.4.



**Note:** There have no behavioral changes to Endeca Server since the last release (version 2.3). Therefore, you can continue to use the same configuration options for Endeca Server and its data stores.

2. Upgrade Integrator.

As a result of this step, you should have Integrator installed and pointing to the workspace that you used for your version 2.3.x Integrator graphs.



**Note:** Do not run any existing graphs in Integrator before you make changes to them.

3. In Integrator, make changes to the graphs you have created in the previous release.
4. Run the upgraded graphs.
5. Upgrade Studio.

[Upgrading Integrator](#)

[Upgrading Studio](#)

## Upgrading Integrator

To upgrade Integrator, you uninstall the existing version and install the new one. You can still use your existing workspace after you install Integrator version 2.4.x.

If you have custom plug-ins deployed to Integrator 2.3, you should back up the plug-ins before beginning the Integrator upgrade. You can reload them after the upgrade.

To upgrade Integrator:

1. Uninstall version 2.3.x. For information, see the *Oracle Endeca Information Discovery Installation Guide*, version 2.3.x.  
After you uninstall, the workspace you used for creating your Integrator graphs should remain in place on your machine.
2. Install Integrator version 2.4.x. For information, see the *Oracle Endeca Information Discovery Installation Guide*, version 2.4.x.
3. Start Integrator and point it to use the workspace you used for your version 2.3.x graphs.

Now you have upgraded to the new version of Integrator. However, do not run your existing graphs until you have made changes to them that are required for Oracle Endeca Information Discovery, version 2.4.x.

After the upgrade, you can proceed to making changes to your existing Integrator graphs, as described in the topic [Required changes for existing Integrator graphs on page 7](#).

If you are reloading a custom plug-in, keep in mind that the installation path has changed. For example, on Windows the 2.3.x default installation path has changed from:

```
C:\Endeca\Latitude\2.3.0\DataIntegrator
```

to this 2.4.x default path:

```
C:\Oracle\Endeca\Discovery\Integrator\2.4.0
```

Because Integrator would still be referencing the `customcomponents.xml` at the previous location, it will have to be updated to the new 2.4.x location.

## Running the upgraded graphs

After you have made changes to the existing graphs, you can run them in Integrator.

After running the graphs and troubleshooting any errors, you can upgrade Studio, and proceed to working with your records using Studio.

## Upgrading Studio

After completing the upgrades to the Endeca Server and Integrator, you then upgrade Studio. These instructions are for upgrading to Studio 2.4.x.

[Requirement to use the same context root](#)

[Stopping and uninstalling the Windows service](#)

[Backing up your Studio 2.3 files](#)

[Installing Studio 2.4.x and restoring backups](#)

[Reconfiguring existing components after the upgrade](#)

### Requirement to use the same context root

The upgrade process assumes that you are using the same installation path and URL. You cannot change the context root during the upgrade process.

### Stopping and uninstalling the Windows service

If your current instance of Studio is running as a Windows service, then before you can start the upgrade, you must first stop and uninstall the service.

To stop and uninstall the Studio Windows service:

1. To stop the service, from the **Services** list, right click the service, then click **Stop**.
2. To uninstall the service:

- (a) From the command line, navigate to the Studio Tomcat bin directory.

```
endeca_portal\tomcat-<version>\bin\
```

- (b) Run the following command:

```
service.bat uninstall
```

## Backing up your Studio 2.3 files

Before installing Studio 2.4.x, you must back up your database and other customized files from Studio 2.3.

To back up your Studio 2.3 files:

1. Stop your Studio server. If you were running Studio as a Windows service, you should already have stopped and uninstalled the service.
2. Back up the Studio database.
  - If you are using HSQL, skip this step. Your database will be backed up as part of step 4 below.
  - If you are using a different database, follow the backup procedures from your vendor.
3. Back up any Studio customizations you have made, such as database connectivity options in `portal-ext.properties`.
4. Back up the entire `endeca-portal\data` directory to a safe backup location.

If you have changed the location of anything normally kept in `endeca-portal\data`, such as your JCR repository or Lucene search indexes, back up your custom location(s) as well.
5. After backing up the files, rename the `endeca-portal` directory.

This ensures that the Studio 2.4.x installation will not overwrite any of the existing files.

You will remove this directory when you complete the Studio 2.4.x installation.

## Installing Studio 2.4.x and restoring backups

You next install Studio 2.4.x. After installing, you use your backed-up files to restore your data and custom settings. You delete the directory containing your previous version, then start Studio 2.4.x.

To complete the upgrade to Studio 2.4.x:

1. Install Studio 2.4.x, following the steps in the *Oracle Endeca Information Discovery Installation Guide*. Do not start the server.
2. From the backed up copy of `endeca-portal\data`, remove the following subdirectories:
  - `ee`
  - `endeca-data-sources`

Make sure that you have saved out any keystore files used to connect to secured data sources.
3. Restore the `endeca-portal\data` directory from the backup location. Overwrite the `endeca-portal\data` files that were installed with Studio 2.4.x.

If you have changed the location of anything normally kept in `endeca-portal/data`, such as your JCR repository or Lucene search indexes, restore and re-verify your custom locations as well.
4. Restore your database, as follows:



- If you are using HSQL, skip this step, since your database was restored as part of step 2.
  - If you are using MYSQL, DB2, or some other RDBMS, your database should still be intact. If it is not, follow the restore procedures from your vendor.
5. In `portal-ext.properties`, if `jdbc.default.connectionCustomizerClassName` is set to `com.liferay.dao.jdbc.pool.c3p0.PortalConnectionCustomizer`, then either comment out or remove the property.  
That class no longer exists.
  6. Configure Studio to connect to your database.  
If you are not using HSQL, you should have created a backup of your database connection strings earlier.
  7. Delete the renamed directory containing your earlier version of Studio.
  8. Start Studio 2.4.x.  
Before you start to use the application, make sure that you wait until all of the components have been deployed and registered. To verify that the upgrade is truly complete, you can monitor the log files to see when all activity has stopped.

## Reconfiguring existing components after the upgrade

Upgrading to Studio 2.4.x may cause your Studio components to lose some or all of their entire configuration.

The components will still display on your pages, but may for example revert to default settings.

After you complete the upgrade, review all of your components and reconfigure them as needed to restore your preferred settings.



## Chapter 2

# Required Changes

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You must make the changes listed here if they apply to your application.

[General changes](#)

[Required changes in Integrator](#)

[Required changes in Studio](#)

## General changes

This section describes changes that affect the entire Oracle Endeca Information Discovery software product.

### Change to Oracle Endeca Server versioning

With this release, the versioning scheme used by Oracle Endeca Server has changed.

Through release 2.3, Oracle Endeca Server and Oracle Endeca Information Discovery used the same release numbering scheme and released on the same schedule. The two products are now released on different schedules, and the latest version of Oracle Endeca Server is 7.4.

### Changes to the documentation set

This section describes changes to the Information Discovery documentation set in version 2.4.

- The *Oracle Endeca Integrator Quick Start Guide* has been removed.
- The *Oracle Endeca Integrator Guide* has been renamed the *Oracle Endeca Integrator Designer Guide*.
- The *Oracle Endeca Integrator Components Guide* has been renamed the *Oracle Endeca Integrator User's Guide*.

## Required changes in Integrator

This section describes required changes in Integrator.

### Required changes for existing Integrator graphs

This topic lists changes you should make in existing graphs before attempting to run them after you upgrade to Integrator version 2.3.x.

### Configuring components for the Endeca Server

In version 2.2.x, the Endeca-developed ingest components (such as the **Bulk Add/Replace Records** component) were configured with the hostname and port of the MDEX Engine.

In version 2.3.x, you configure these components with the hostname and port of the Endeca Server. In addition, you also specify the name of the Endeca data store. In general, it is a good idea to replace the 2.2.x component with the 2.3.x versions, rather than updating the components in place.

### Changes in the namespace of the Configuration Web Service

Change the namespace in the **Request Structure** of those components that use calls to the Configuration Web Service, such as the **WebServiceClient** component.

The namespace of the Configuration Web Service has changed to the following:

```
<config-service:configTransaction
  xmlns:config-service="http://www.endeca.com/MDEX/config/services/types/1/0"
  xmlns:mdex="http://www.endeca.com/MDEX/XQuery/2009/09">
```

This means that if you used the **WebServiceClient** for sending requests through the Configuration Web Service, you need to change the way the **Request Structure** is specified. Use the following example:

```
<config-service:configTransaction
  xmlns:config-service="http://www.endeca.com/MDEX/config/services/types/1/0">
<config-service:putConfigDocuments
  xmlns:mdex="http://www.endeca.com/MDEX/XQuery/2009/09">
<mdex:configDocument name="recsearch_config">
<RECSEARCH_CONFIG>
  $xmlString
</RECSEARCH_CONFIG>
</mdex:configDocument>
</config-service:putConfigDocuments>
</config-service:configTransaction>
```

In this example, the line:

```
xmlns:config-service="http://www.endeca.com/MDEX/config/services/types/1/0"
```

correctly identifies the namespace.

## Required changes in Studio

For Studio, the following changes are required.

### [General Studio changes](#)

### *Studio changes specific to the Component SDK*

## General Studio changes

These changes apply to Studio in general.

### Removed support for Crypt password encryption

As part of the third-party dependency remediation, we removed support for the Crypt encryption algorithm.

This encryption option is currently not enabled or used by Studio's default configuration, which uses the default SHA algorithm. If your users are managed by Studio (not integrated with an external authentication system such as Active Directory or LDAP), and if you have enabled the Crypt encryption feature in your Studio configuration, then your administrator must reset the user passwords.

## Studio changes specific to the Component SDK

These changes only apply to users who have used the Studio Component SDK to develop custom components.

### Changes to the async layer for Studio custom components

As of version 2.4, we have reworked the async layer to replace binding with iterating over lists. This includes updates to `postRender.jspf`.

When migrating custom components, you must at a minimum rebuild them to be compatible with the new `endeca-common-resources`, which includes the updated `postRender.jspf`.

- If the custom component has its own `/postRender.jspf` and is not using the one found in `endeca-common-resources`, then you must:
  - Replace `asyncObj<portlet:namespace/>.unbindAllEvents();` with `asyncObj<portlet:namespace/>.setEventsEnabled(false);`
  - Replace `asyncObj<portlet:namespace/>.bindEvents();` with `asyncObj<portlet:namespace/>.setEventsEnabled(true);`

When a component renders, it turns off the async for itself so that it can initiate the required events, and then turns async back on again when it is finished. Instead of using the binding calls, we now set flags to enable and disable events.

- If the customer has written their own `Async.postRender()` in their `view.jsp`, then they need to be aware of the following.

The standard `postRender.jspf` checks whether customers have defined a `postRender()` method on their component's instance of an `Endeca.Async` object. The following methods for `Endeca.Async` have been removed:

- `bindEvents()`
- `unbindAllEvents()`
- `bindProcessingEvents()`
- `bindDataSource()`

- `bindEvent(event, func)`

Data sources and processing events no longer need binding. If events are enabled, then as long as an event is in the `Endeca.Async.processingEvents` list or the `Endeca.Async.datasource` list, it will be fired.

The `bindEvent(event, func)` method was used to bind events that were neither `processingEvents` nor `datasource` events. There is no direct replacement for this method. If you have used this method, then you will need to extend our `Endeca.Async` code to handle it.

## JUnit tests for custom components require an additional .jar file

Because of licensing issues, `junit.jar` is no longer included with Studio.

If you have created custom components, and have set up unit tests for those components, you will need to download and install your own copy of `junit.jar`.



## Chapter 3

# Behavioral Changes

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The changes listed here do not require any action on your part, but will affect how your application behaves after you upgrade.

### *Behavioral changes in Studio*

## Behavioral changes in Studio

For Studio, you should be aware of the following behavioral changes.

### *Default capitalization changed for Tag Cloud values*

### *Bookmark names must be unique*

## Default capitalization changed for Tag Cloud values

Previously, the **Tag Cloud** component always converted the displayed values to all lowercase.

The default behavior has changed. **Tag Cloud** now displays the values as is from the original data.

The **Tag Cloud** edit view includes a new configuration option to determine whether to convert the values to lowercase.

## Bookmark names must be unique

For all bookmarks created by a user, Studio now requires the bookmark names to be unique.

When users create new bookmarks or edit existing bookmarks, even bookmarks created before the upgrade, Studio will enforce the uniqueness requirement.