

Oracle® Endeca Information Discovery

Quick Start Guide

Version 2.4.0 • November 2012

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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 discusses how to get a basic Oracle Endeca Information Discovery application up and running in a short period of time.

It outlines how to perform a quick installation on a single Windows machine, and then walks you through loading the sample data, provisioning an application, and exploring the sample data in a Studio application.

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

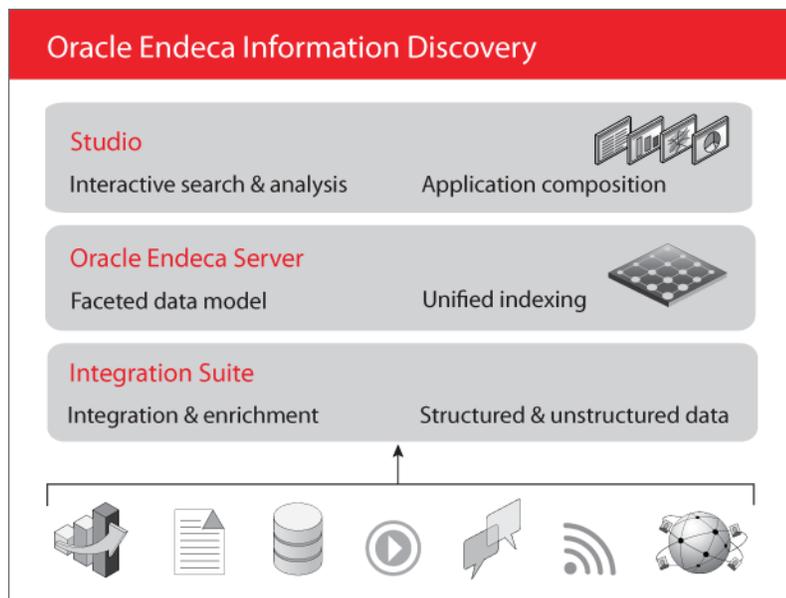
About Oracle Endeca Information Discovery

Before you install the Quick Start application, here is an overview of the Oracle Endeca Information Discovery platform.

[Overview of Oracle Endeca Information Discovery](#)

Overview of Oracle Endeca Information Discovery

Oracle Endeca Information Discovery is a data discovery platform that guides people to better decisions on diverse and changing data. It is based on a patented hybrid search-analytical database, and gives IT a centralized platform to rapidly deploy interactive analytic applications, and keep pace with changing business requirements while maintaining information governance.



Oracle Endeca Information Discovery consists of the following modules:

- Self-service composition and configuration of applications, views and dashboards—by business analysts—through **Studio**.
- Search, Guided Navigation™, and analytics capabilities powered by the **Oracle Endeca Server**.
- A comprehensive **Integration Suite**, featuring the **Integrator** enterprise ETL solution, which includes connectors for standard structured and unstructured data sources, a comprehensive data enrichment library, and direct connectors to the Oracle Endeca Server.



Note: Oracle Endeca Server follows a different versioning scheme than Integrator and Studio. Version 2.4 of Oracle Endeca Information Discovery works with version 7.4 of Oracle Endeca Server.



Chapter 2

Installing Oracle Endeca Information Discovery

For the Quick Start, you run a combined installer that installs all of the Oracle Endeca Information Discovery modules.

[Downloading the Oracle Endeca Information Discovery software](#)

[Running the All-in-One Installer](#)

Downloading the Oracle Endeca Information Discovery software

You can download the Oracle Endeca Information Discovery 2.4.0 Quick Start files from the Oracle Software Cloud.

To download the Oracle Endeca Information Discovery Quick Start:

1. Log in to <https://edelivery.oracle.com>.
2. Accept the terms and restrictions.
3. On the **Media Pack Search** page:
 - (a) From the **Select a Product Pack** drop-down list, select **Oracle Endeca**.
 - (b) From the **Platform** drop-down list, select **Microsoft Windows x64 (64-bit)**.
 - (c) Click **Go**.

The list of Oracle Endeca media packs for Windows is displayed.

4. In the media pack list, click **Oracle Endeca Information Discovery (2.4) Media Pack v1 for Microsoft Windows x64 (64-bit)**.

The **Download** page displays, listing the downloads for the selected media pack.

5. Download the **Oracle Endeca Information Discovery Quick Start (2.4) for Microsoft Windows x64 (64-bit)**.

The downloaded file, `EID24_QuickStart.zip`, contains:

<code>EID_2.4_Installer.exe</code>	The all-in-one installer for Oracle Endeca Information Discovery. (Installs Oracle Endeca Server 7.4.x, Integrator 2.4.x, and Studio 2.4.x.)
<code>EID_2.4_QuickStart.pdf</code>	A copy of this <i>Quick Start Guide</i> .

6. Extract the files from `EID24_QuickStart.zip` to a temporary directory.

Running the All-in-One Installer

Once you have downloaded the Oracle Endeca Information Discovery All-in-One Installer, you can begin installing the Oracle Endeca Information Discovery modules.



Important: This installation procedure assumes you are working off a 64-bit, dual-core Windows machine with administrator privileges that has never had Oracle Endeca Information Discovery installed on it. (For detailed information on supported hardware and operating systems, see the *Oracle Endeca Information Discovery Installation Guide*.)

If you have a previous version of Oracle Endeca Information Discovery installed on your machine, then before beginning this procedure, you need to uninstall it and delete any related directories.

The Oracle Endeca Information Discovery All-in-One Installer sets your `CATALINA_HOME` environment variable to point to the Apache Tomcat server that is included with Studio. It overwrites any previous value set for this variable. If you have an existing value set for this variable, you should consider backing it up before installing Oracle Endeca Information Discovery.

To install Oracle Endeca Information Discovery 2.4.0:

1. Double-click `EID_2.4_Installer.exe`.
The **InstallAware Wizard** window appears.
2. When the **InstallAware Wizard** finishes verifying the contents of the installation package, click **Next**.
The **Important Information** screen displays.
3. Read through the important information, then click **Next**.
The **InstallAware Wizard** indicates it is ready to begin installation of Oracle Endeca Information Discovery 2.4.0.
4. If you are ready to begin installation, click **Next**.
The **Destination Folder** screen displays.
5. In the **Destination Folder** screen, either accept the default `C:\Oracle` installation folder or select another installation location, then click **Next**.



Important: If you do select a different installation location, make sure that the directory path does not contain any spaces. For example, you cannot install under `C:\Program Files`. If the directory path includes spaces, then the Endeca Server will not start.

The **InstallAware Wizard** begins installation of Oracle Endeca Information Discovery 2.4.0. When it completes, a screen displays indicating that the installation has finished.

6. Click **Finish**.

Oracle Endeca Information Discovery 2.4.0 is now installed on your computer.

The installer creates the `C:\Oracle\Endeca` folder, which contains these sub-folders:

- `Server\7.4.0` is the Oracle Endeca Server installation folder.
- `Discovery\2.4.0\Integrator` is the Integrator installation folder.

- `Discovery\2.4.0\Studio` is the Studio installation folder. The `examples` sub-folder contains the Quick Start application for Studio.

The installer adds an **Oracle Endeca Information Discovery 2.4.0** entry to the **Start** menu with these sub-entries:

- **Integrator**: starts Integrator
- **Start Studio Server**: starts Studio
- **Stop Studio Server**: stops Studio
- **Studio**: opens the Studio home page in your browser (if Studio is running)
- **Uninstall Oracle Endeca Information Discovery**: uninstalls Oracle Endeca Information Discovery 2.4.0 and Oracle Endeca Server 7.4

The installer also adds an **Oracle Endeca Server 7.4.0** entry to the **Start** menu with these sub-entries:

- **Start Endeca Server**: starts Endeca Server
- **Stop Endeca Server**: stops Endeca Server

Besides these entries, the installer adds a link to Integrator in the **Start** menu's Jump List of programs.



Chapter 3

Provisioning the Quick Start Application

After completing the initial installation, you run the Integrator Quick Start project pipeline to create an Endeca data store, then load the Quick Start application into Studio.

Loading the Quick Start data

Starting Studio and loading the Quick Start application

Loading the Quick Start data

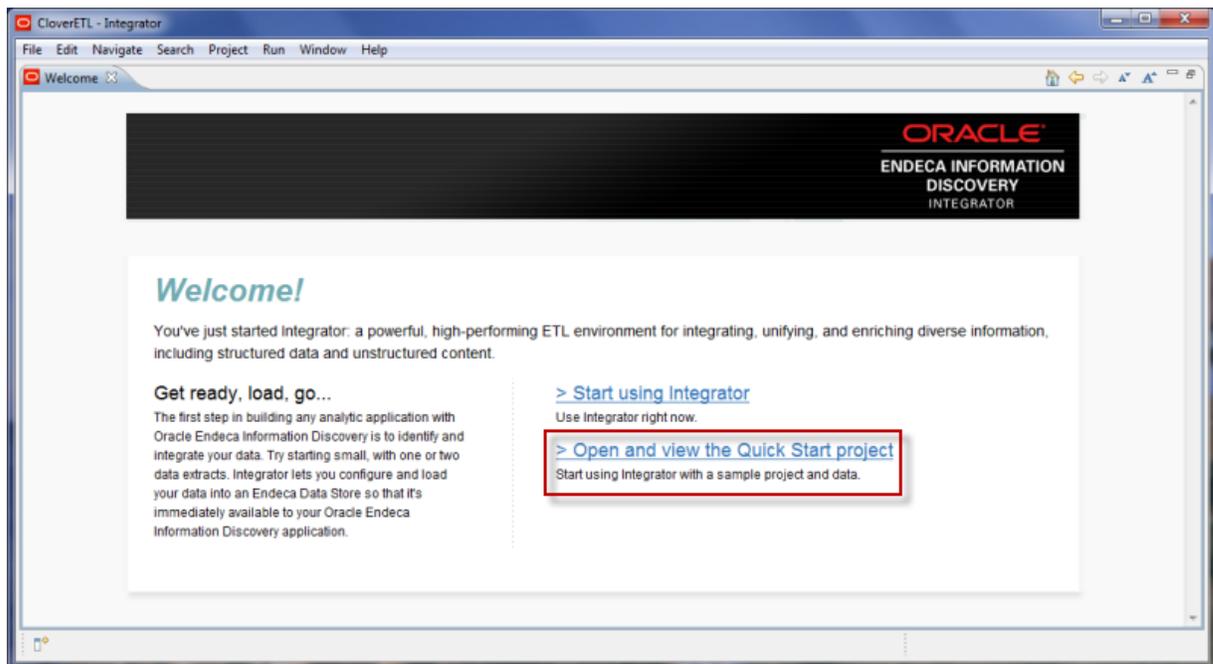
You load the Quick Start application data using Integrator.

Starting Integrator

In order to run the Quick Start project pipeline, you must launch Integrator.

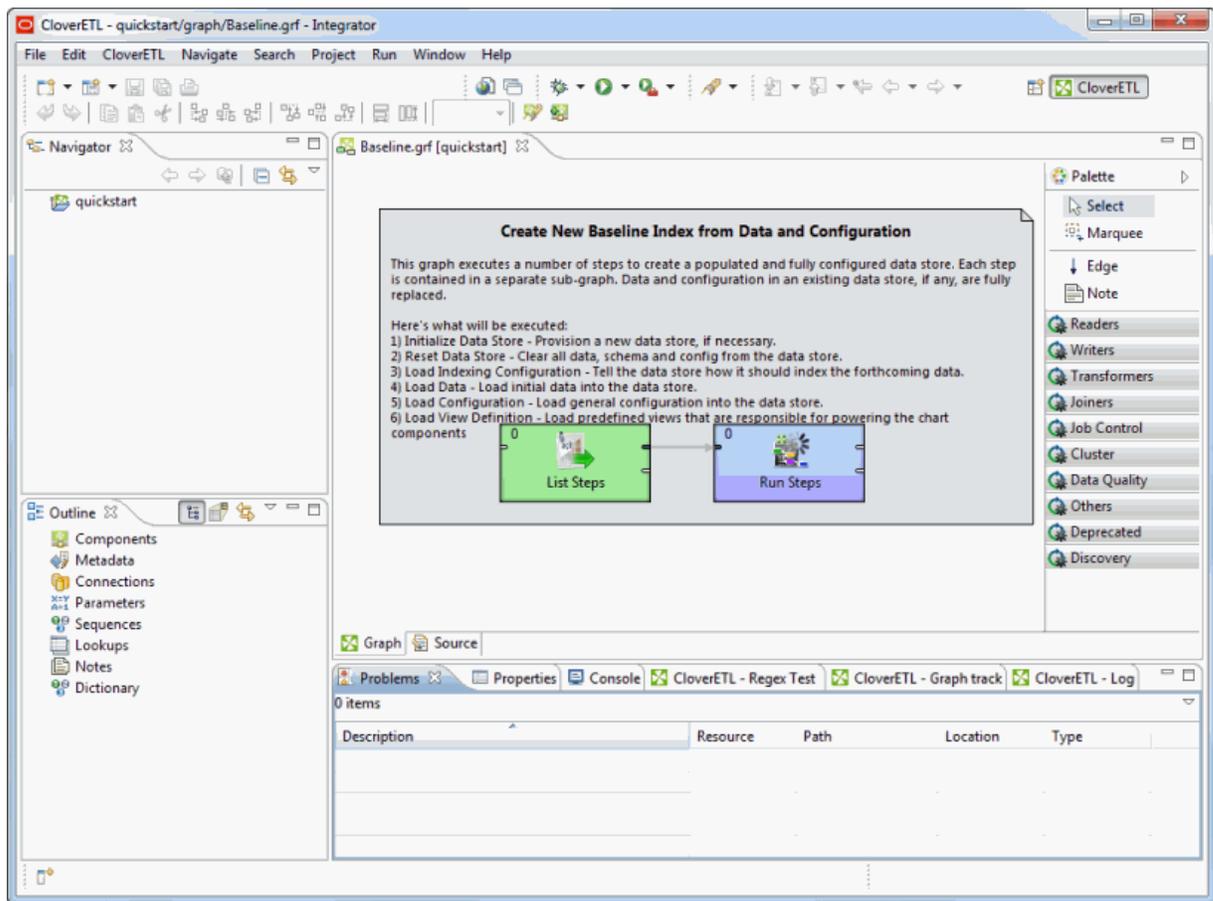
To start Integrator:

1. Choose **Start>All Programs>Oracle Endeca Information Discovery 2.4.0>Integrator**.
The Integrator splash screen displays first, followed by the **Workspace Launcher** dialog box.
2. Click **OK** to accept the default workspace location or click **Browse** to select another location.
 **Note:** The workspace is the folder in which Integrator stores all your project files. If you want to use the same folder each time you run Integrator, check **Use this as the default and do not ask again** before clicking **OK**.
3. The first time you launch Integrator, the Welcome screen displays, as pictured. Click **Open and view the Quick Start project** (highlighted).



Note: If you want to return to this Welcome screen at any point while you are in the Integrator workspace, choose **Help > Welcome**.

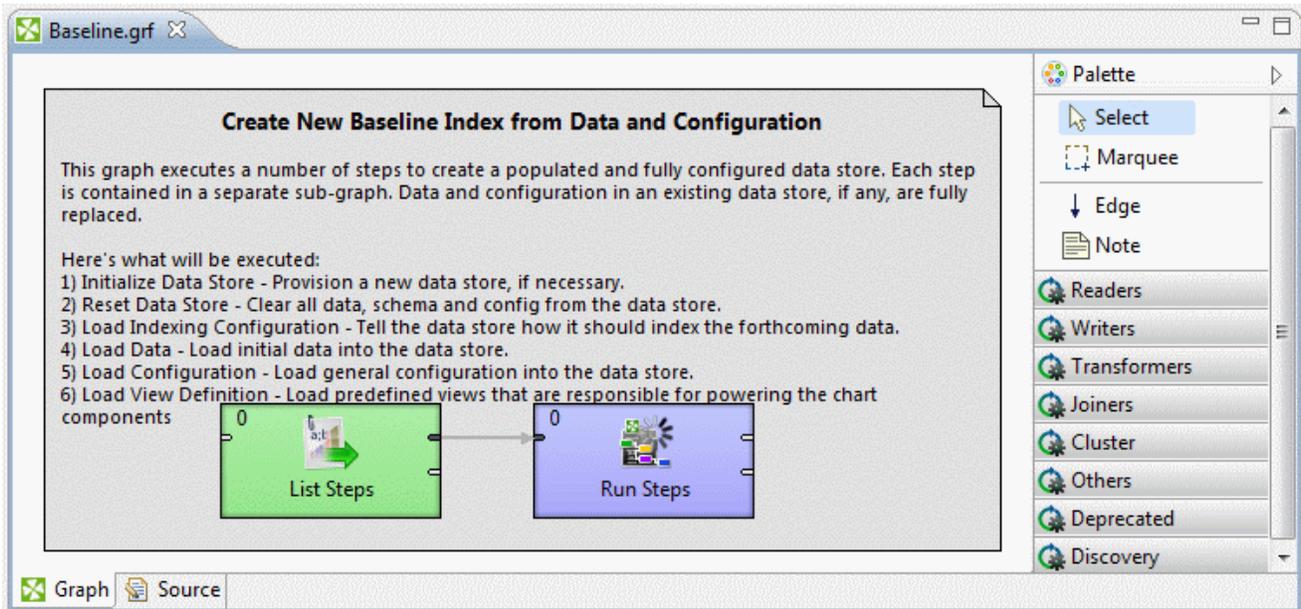
The Integrator workspace opens, loaded with the Quick Start project, as pictured.



Running the pipeline project

This topic discusses how to run the pipeline for the Quick Start application.

Make sure `Baseline.grf` is open in Integrator, as pictured, and that the `quickstart` project appears in the **Navigator** pane.



To run the pipeline project:

1. Start the Oracle Endeca Server by selecting **Start>All Programs>Oracle Endeca Server 7.4.0>Start Endeca Server**.

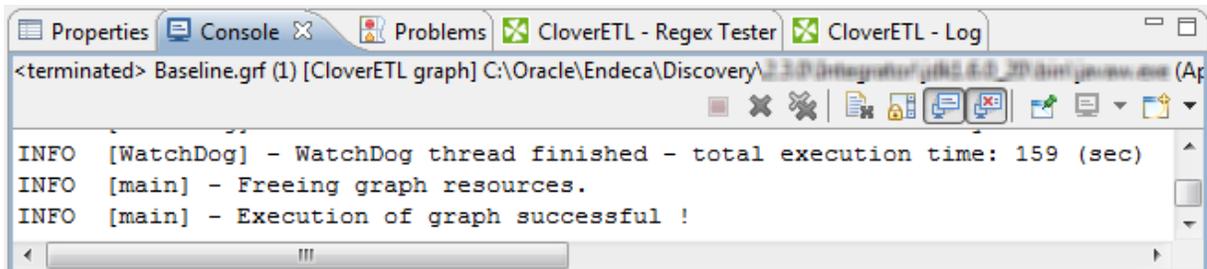
Oracle Endeca Server starts up on its default port of 7770, and is completely running when you see the **STARTING** message displayed in the output window.



Important: Do not close the Endeca Server command window at any point while you are using Integrator.

2. Click anywhere in the Baseline graph's gray box to give it focus (indicated by a black line around the box), then click **Run** .

Integrator processes `Baseline.grf`, which initializes a new, empty Endeca data store instance (named `quickstart`) and loads the data and configuration for the Quick Start application. This step will take several minutes. You can monitor the graph's progress in the **Console** (located at the bottom of the workspace). It issues an `Execution of graph successful` message when finished.



3. When the graph processing completes, close Integrator.

If you subsequently restart your machine, Endeca Server (when started) will automatically start up the `quickstart` data store.

Starting Studio and loading the Quick Start application

Now that the data and configuration is loaded into your Quick Start data store, you can run Studio and load the Quick Start application.

Starting Studio

Before you can load and explore the sample application, you must start the Studio server and log in to Studio.



Important: The Studio **Chart** component requires Adobe Flash Player 10.x. If you do not already have Flash Player installed on your machine, you will need to download it from <http://get.adobe.com/flashplayer> and install it before using Studio.

To start Studio:

1. Choose **Start>Oracle Endeca Information Discovery 2.4.0>Start Studio Server**.

A command window opens, displaying log messages for the server start-up process. This process takes several minutes to complete. When the server is started, you will see a message similar to this:

```
org.apache.catalina.startup.Catalina start
INFO: Server startup in xxxxx ms
```



Important: Do not close the Tomcat command window at any point while you are using Studio.

2. Once the server is started, choose **Start>Oracle Endeca Information Discovery 2.4.0>Studio**. Alternatively, you can open a browser and go to `http://localhost:8080`.

The Studio login page opens in a browser window.

3. Log in to Studio using the default login and password:

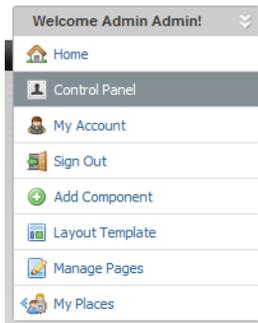
Email Address:	admin@oracle.com
Password:	admin

Loading the Quick Start application

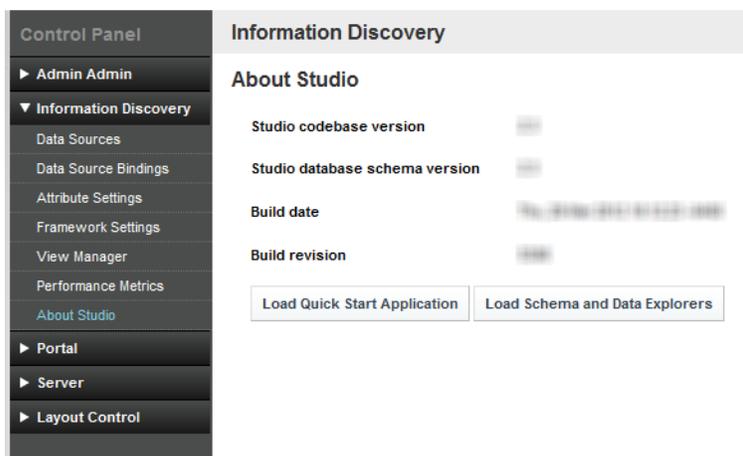
Before you can begin exploring the Quick Start application, you must load it into Studio.

To load the Quick Start application:

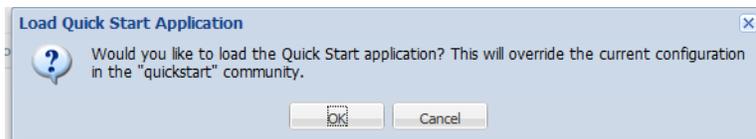
1. Hover the mouse over the arrow button next to **Welcome Admin Admin!** (located in the top right corner of the screen).
2. In the drop-down menu, click **Control Panel**.



3. In the **Control Panel** menu, under **Information Discovery**, click **About Studio**.
4. On the **About Studio** page, click **Load Quick Start Application**.



Studio prompts you to confirm that you want to load the application.



5. On the confirmation message, click **OK**.
- Studio creates a new **quickstart** community, and then loads the application into that community. It also creates a **quickstart** data source, with the following connection information:

Endeca Server:	localhost
Port:	7770
Data store name:	quickstart

You can view the details for the **quickstart** data source from the **Data Sources** component of the **Control Panel**.

When it finishes the upload, Studio displays a message indicating that the upload is complete. The message includes a hyperlink to the Quick Start application.



It also includes a warning if Studio is unable to connect to the data source.

6. To close the **Control Panel**, click **Back to Guest**.



Chapter 4

Exploring the Quick Start Application

Now that you have completed the installation and loaded the Quick Start application, you can explore it in Studio.

[About the Quick Start application](#)

[Navigating to the Quick Start application](#)

[Overview of the Quick Start application pages](#)

[Sharing the Quick Start application](#)

About the Quick Start application

The Quick Start application demonstrates Studio in action, using sales and product data from a fictitious bicycle manufacturer.

Customers can rapidly and iteratively deploy applications similar to the Quick Start application, incorporating data from multiple disparate sources into easily consumable, interactive, online experiences.

Featuring familiar visualizations, such as charts, tag clouds, and tables, in addition to its patented search and Guided Navigation™ technology, Studio provides visibility and better decision-making capabilities to a broad range of business users.

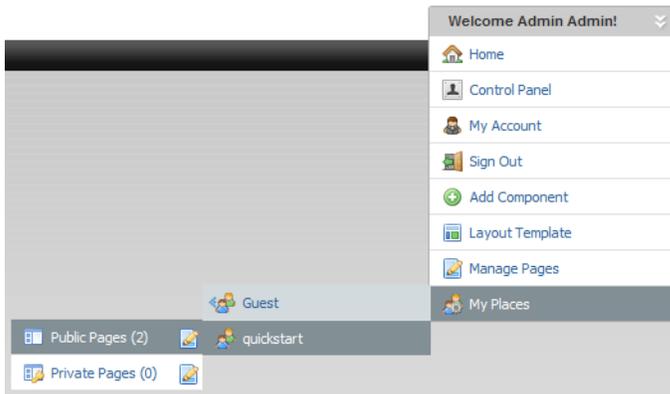
To experience Studio, use the Quick Start application to analyze the performance of resellers and products across a wide variety of dimensional attributes.

Navigating to the Quick Start application

The Quick Start application is created in the **quickstart** community.

To display the Quick Start application:

1. Hover the mouse over the arrow button next to **Welcome Admin Admin!** (located in the top right corner of the screen).
2. In the drop-down menu, click **My Places>quickstart>Public Pages**.

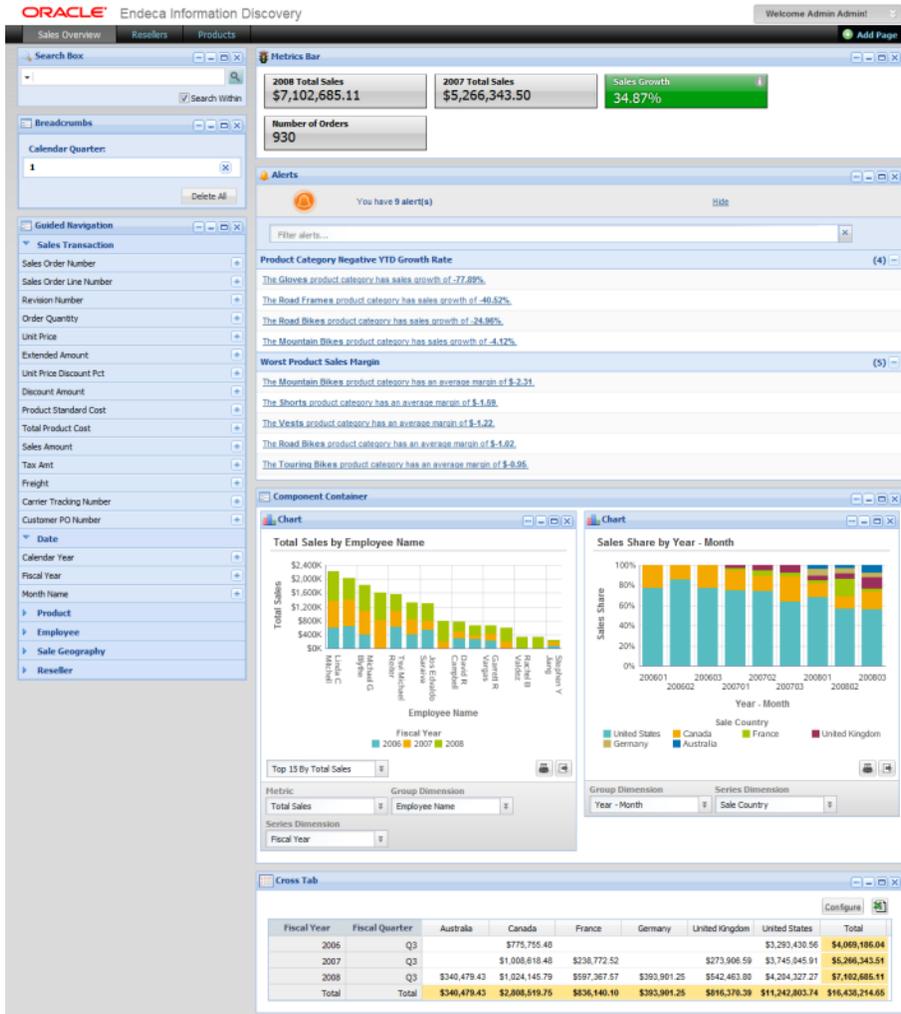


The Quick Start application is displayed.

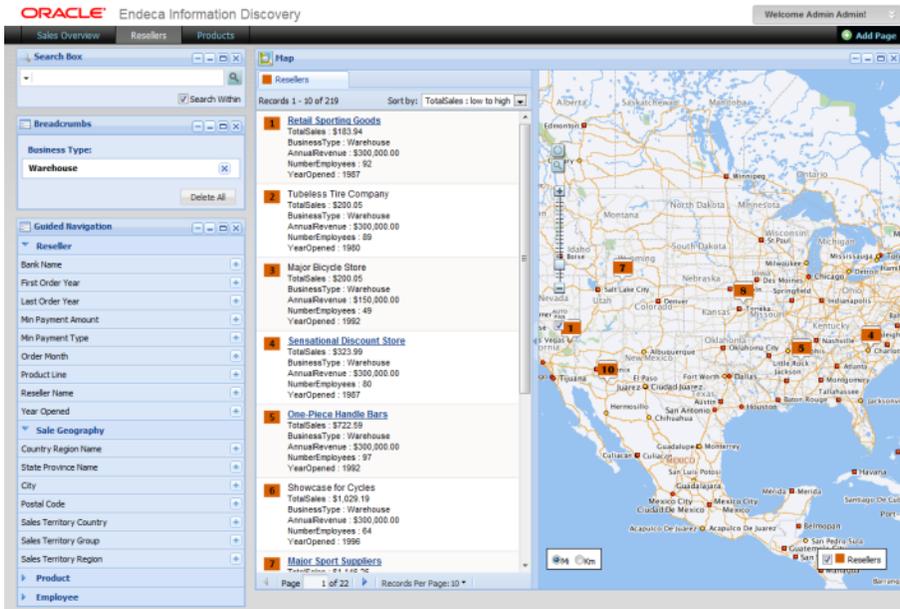
Overview of the Quick Start application pages

The pages in the Quick Start application all use the same sales and product data from a fictitious bicycle manufacturer. Each page focuses on a different aspect of the data.

The **Sales Overview** page provides a dashboard to view and explore overall sales figures.



The **Resellers** page provides details associated with the resellers for the sales transactions, and includes a map of the reseller locations.



The **Products** page allows users to view and explore the sales records in the context of the products that were sold.

The screenshot displays the Oracle Endeca Information Discovery 'Products' page. The interface includes a search box, breadcrumb navigation for 'Clothing', and a guided navigation sidebar. The main content area features a metrics bar with 'Top Product: Jerseys' and 'Total Sales for Product: \$344,278.46'. Below this is a tag cloud and two charts: 'Sales Share, Avg Quantity by Product Subcategory Name' and 'Sales Sum by Year Month'. A results table lists various products like 'Men's Sports Shorts' and 'Classic Vest' with columns for sales number, product name, survey response, bank name, business type, and first order date. A record details section for 'Sales Transaction: SO48378-3' provides further data on order quantity, amount, and cost.

Sharing the Quick Start application

To share the Quick Start application, use the following link: <http://<your machine's IP address>:8080/quickstart>.



Chapter 5

Next Steps

After you explore the Quick Start application, here are the next steps you can take with Oracle Endeca Information Discovery.

[Obtaining more information](#)

[Uninstalling Oracle Endeca Information Discovery](#)

Obtaining more information

Here are some additional resources that can help you be successful with Oracle Endeca Information Discovery.

This guide walked you through a basic scenario and does not account for possible differences that you may have in your real staging environment, such as alternate platforms, additional system requirements, or specific use cases for loading data.

Depending on your role in the deployment process, you should consult the following Oracle Endeca Server and Oracle Endeca Information Discovery guides to find more specific in-depth information:

If you are...	See this guide...
Any user who needs to learn more about Oracle Endeca Information Discovery terminology	The <i>Oracle Endeca Information Discovery Glossary</i> contains definitions for related modules, concepts, and terms.
An administrator who needs to install Oracle Endeca Information Discovery, or learn about system requirements or platform support	The <i>Oracle Endeca Information Discovery Installation Guide</i> contains platform support information and detailed installation instructions for all currently supported installation environments.
An administrator who needs to know how to administer and maintain the Oracle Endeca Server and Studio	The <i>Oracle Endeca Server Administrator's Guide</i> provides information about various administrative tasks associated with the Oracle Endeca Server, such as job monitoring, capturing snapshots, and deploying in a cluster. The <i>Oracle Endeca Information Discovery Studio User's Guide</i> provides information about administrative tasks associated with Studio.

If you are...	See this guide...
An ETL developer or data architect who needs to load data into Oracle Endeca Server	The <i>Oracle Endeca Information Discovery Integrator User's Guide</i> describes how to load data. In addition, the <i>Oracle Endeca Server Data Loading Guide</i> describes the Data Ingest Web Service API used by Integrator.
A developer who needs to know about features of the Oracle Endeca Server such as search, refinements, search interfaces, or thesaurus	The <i>Oracle Endeca Server Developer's Guide</i> describes the core features of the Oracle Endeca Server that you can access via applications built with Studio. It covers basic concepts, working with records and attributes, and search configuration.
An application developer who needs to configure the behavior of various components in Studio	The <i>Oracle Endeca Information Discovery Studio User's Guide</i> describes how to configure the Studio framework and components.
A developer who needs to know about the APIs for the Oracle Endeca Server	The <i>Oracle Endeca Server Developer's Guide</i> describes the Oracle Endeca Server Web Services used by Studio. In addition, see the <i>API Reference</i> for information about Web services and schemas that are packaged with the Oracle Endeca Server. It is located in the <code>doc/wsdl</code> and <code>doc/xsd</code> directories of the Oracle Endeca Server installation.
A developer who needs to know how to extend Studio	The <i>Oracle Endeca Information Discovery Studio Developer's Guide</i> provides information on how to extend Studio. For additional information about extending Information Discovery Studio, see the Studio Javadoc, which is packaged with the rest of the Studio documentation.

To get access to the Oracle Endeca Information Discovery documentation, go to the [Oracle documentation library](#).

User Forums

The Oracle forums include an [Information Discovery forum](#). You can use this forum to post questions and view information from other users and experts.

You should also visit the OTN (Oracle Technology Network) Product Page: <http://www.oracle.com/technetwork/middleware/endeca/overview>. This page contains other useful content for someone getting up to speed, including videos and best practices.

Education and Training

Oracle offers training courses on configuring and using Oracle Endeca Information Discovery.

For information on available courses, see the [Oracle University site](#).

Uninstalling Oracle Endeca Information Discovery

After you have finished exploring the Oracle Endeca Information Discovery suite of modules, you may want to uninstall the product.

To uninstall Oracle Endeca Information Discovery from your Windows machine:

1. Close or shut down all components:
 - (a) In Integrator, select **File>Exit** to close the application.
 - (b) Choose **Start>All Programs>Oracle Endeca Information Discovery 2.4.0>Stop Studio Server** to shut down Studio.
 - (c) Choose **Start>All Programs>Oracle Endeca Server 7.4.0>Stop Endeca Server** to shut down Endeca Server.
2. Choose **Start>All Programs>Oracle Endeca Information Discovery 2.4.0>Uninstall Oracle Endeca Information Discovery**.
 **Note:** This uninstalls both Oracle Endeca Information Discovery and Oracle Endeca Server.
3. Click **Yes** when you are asked to verify the uninstall procedure.
The Uninstall wizard is launched and begins to remove the components.
4. When the uninstallation procedure is completed, click **Finish**.

Note that it is possible for Studio to create temporary files with extra-long names. The uninstaller may not be able to completely delete Studio's `tomcat-<version>\temp` folder. If this happens, you can manually delete the `Oracle` root folder.

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