

Oracle® Endeca Information Discovery Studio

Studio 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 Endeca Information Discovery Studio implementation by describing the major changes between version 2.4.x and 3.0.x.

Note that this guide only covers changes to Studio.

- For information on migrating Oracle Endeca Server, see the *Oracle Endeca Server Migration Guide* for version 7.5.1.
- For information on migrating Oracle Endeca Information Discovery Integrator, see the *Integrator Migration Guide*.

Who should use this guide

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

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.

Conventions used in this document

The following conventions are used in this document.

Typographic conventions

The following table describes the typographic conventions used in this document.

Typeface	Meaning
User Interface Elements	This formatting is used for graphical user interface elements such as pages, dialog boxes, buttons, and fields.
<code>Code Sample</code>	This formatting is used for sample code phrases within a paragraph.

Typeface	Meaning
<i>Variable</i>	This formatting is used for variable values. For variables within a code sample, the formatting is <i>Variable</i> .
File Path	This formatting is used for file names and paths.

Symbol conventions

The following table describes symbol conventions used in this document.

Symbol	Description	Example	Meaning
>	The right angle bracket, or greater-than sign, indicates menu item selections in a graphic user interface.	File > New > Project	From the File menu, choose New, then from the New submenu, choose Project.

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Chapter 1

Upgrading to Oracle Endeca Information Discovery Studio Version 3.0.x

This section provides instructions for upgrading to Oracle Endeca Information Discovery Studio 3.0.x. Before you start the upgrade process, check the remaining sections of this guide to learn about the changes that will affect you during or after the upgrade.

[Required reading](#)

[High-level upgrade procedure](#)

[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 3.0.x.

Release Notes

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

Installation Guide

The *Studio Installation Guide* provides an overview of Studio and includes information about configuration scenarios. It contains installation instructions for Studio, and information on how to verify your installation.

High-level upgrade procedure

This topic provides the recommended order for upgrading to version 3.0.x of Studio.

The upgrade process in this guide includes upgrade procedures for Studio. Upgrade procedures for Oracle Endeca Server can be found in the *Oracle Endeca Server Migration Guide*. Upgrade procedures for Oracle Endeca Information Discovery Integrator can be found in the *Integrator Migration Guide*.

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 from version 2.4.x to version 3.0.x of Studio:

1. Upgrade to version 7.5.1 of Oracle Endeca Server.

For information on upgrading Oracle Endeca Server, see the *Oracle Endeca Server Migration Guide* for version 7.5.1.

As a result of this step, you should have Oracle Endeca Server installed and started. You may also have an empty Endeca data domain that you created to verify the installation.

2. Upgrade to version 3.0.0 of Oracle Endeca Information Discovery Integrator.
For upgrade information, see the *Integrator Migration Guide* for version 3.0.0.

As a result of this step, you should have Integrator installed. You should also have made any required updates to your existing graphs.

3. Upgrade Studio. See [Upgrading Studio on page 8](#).

Upgrading Studio

This section describes how to upgrade to Studio 3.0.x.

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

[Verifying your default data source](#)

[Stopping and uninstalling the Windows service \(for Tomcat instances\)](#)

[Backing up your Studio 2.4.x files](#)

[Installing Studio 3.0.x and restoring backups](#)

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.

Verifying your default data source

After you upgrade, your Studio applications are all bound to the data source configured as the value of the `df.defaultDataSource` Framework Setting.

Before you upgrade, check that setting to verify that it's set to a valid data source.

Stopping and uninstalling the Windows service (for Tomcat instances)

If your current instance of Studio is installed on Tomcat, and 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 2.4.x files

The first step in migrating to Studio 3.0.x is to back up the files from Studio 2.4.x.

To back up your Studio 2.4.x files:

1. Stop your Studio server.
2. Back up your database.

If you are using HSQL, then you can skip this step. Your database will be backed up when you back up the `data` directory.

If you are using MySQL or some other RDBMS, 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 `data` directory to a safe backup location.

For Tomcat, the `data` directory is in `endeca-portal`.

For WebLogic, the `data` directory is in the Liferay Home directory.

If you have changed the location of anything normally kept in `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` or Liferay Home directory.

This ensures that the Studio 3.0.x installation will not overwrite any of the existing files.

You will remove this directory when you complete the Studio 3.0.x installation.

Installing Studio 3.0.x and restoring backups

You next install Studio 3.0.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 3.0.x.

To complete the upgrade to Studio 3.0.x:

1. Install Studio 3.0.x, following the steps in the *Studio Installation Guide*. Do not start the server.
2. Restore the entire `data` directory from your safe backup location. Overwrite the `data` files that were installed with Studio 3.0.x.

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

3. Restore your database:

If you are using HSQL, you can skip this step. Your database was restored when you restored the data directory.

If you are using MySQL or some other RDBMS, your database should still be intact. If it is not, follow the restore procedures from your vendor.

4. 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.

5. Delete the renamed directory containing your earlier version of Studio.

6. Because the encryption algorithm for user passwords has changed, before you restart Studio, you must reset the password of at least one administrative user.

If you do not do this, then you will not be able to log in to Studio.

For databases other than Hypersonic, you can run a SQL script against the Studio database. For a Hypersonic database, you must modify the database user file directly.

For more information about this change, including the script, see [User password encryption algorithm changed on page 13](#).

7. Start Studio 3.0.x.

Before you start to use Studio, 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.

For details on how Studio handles existing communities (now called applications) and components after the upgrade, see [Studio application \(was community\) management and component changes on page 14](#).



Chapter 2

Required Changes in Studio

For Studio, the following changes are required.

Changes to the documentation set

Studio terminology changes

Organizations no longer supported

Studio security changes

Studio data source and filter changes

Studio application (was community) management and component changes

Changes to Oracle Endeca Information Discovery packaging

In this release, the Oracle Endeca Information Discovery packaging has changed.

Previously, the Oracle Endeca Information Discovery package consisted of Studio and Integrator.

In this release, Information Discovery Studio and Information Discovery Integrator are released as two separate products with separate documentation sets.

Addition to the Oracle Endeca Integrator package

Starting with release 3.0, Oracle Endeca Integrator contains both Integrator and the Integrator Acquisition System, or IAS.

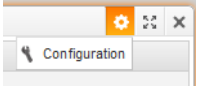
Changes to the documentation set

In version 3.0, the following changes have occurred to the Oracle Endeca Information Discovery documentation set.

- The *Studio Developer's Guide* has been removed.
- A new *Studio Administration and Customization Guide* has been added. The new guide includes the content from the *Studio Developer's Guide*, as well as Studio administrator tasks that were previously in the *Studio User's Guide*.
- The *Oracle Endeca Information Discovery Quick Start Guide* has been replaced by the *Oracle Endeca Information Discovery Getting Started Guide*.

Studio terminology changes

Studio has made changes to some of the terminology used in the application.

Previous Term	New Term	Description of Change
Community	Application	<p>Studio is now based on applications.</p> <p>Applications are made up of one or more pages, which contain Studio components.</p> <p>Users get access to and create applications from a new Studio home page.</p>
Cross Tab	Pivot Table	<p>The Cross Tab component has been renamed to Pivot Table, to more accurately reflect its function.</p>
Preferences	Configuration	<p>In the component menu, the Preferences option, which displays the component edit view, is now labeled Configuration.</p>  <p>The previous Configuration menu option, which was used to control component access based on user roles, has been removed.</p>

Organizations no longer supported

Previous releases of Studio supported using the concept of "organizations" as a way to group and manage users. As of 3.0, organizations have been removed from Studio.

If you were previously using organizations to group your users, those organizations will no longer exist.

You may want to create user groups to replicate your previous organizations.

Studio security changes

These changes are related to security management in Studio.

HTTP Basic authentication no longer supported

Access for non-logged-in users removed

User password encryption algorithm changed

LDAP connection password encryption changed

HTTP Basic authentication no longer supported

Studio no longer supports HTTP Basic authentication.

Access for non-logged-in users removed

Previously, Studio content could be configured to be viewed by users who were not logged in to Studio. For increased security, this access has been removed.

A user must be logged in to Studio in order to see any Studio content.

The **Sign In** component now displays on a standalone page. You can no longer add the **Sign In** component to a page.

If you have existing content that relied on guest access, you must create Studio users for anyone who needs to view that content.

User password encryption algorithm changed

For improved security, for Studio user passwords, we have changed the security algorithm from SHA-1 to SHA-256.

If you have any users stored in the Studio database, then those passwords will need to be reset.

For databases other than Hypersonic, run a SQL script against the Studio database to reset the password of at least one administrative user. For example:

```
update User_
set PASSWORD_ = 'admin456', PASSWORDENCRYPTED = 0, PASSWORDRESET = 1
where SCREENNAME = 'admin';
```

The script resets the password to a plain text string, and forces it to be changed on first login.

For a Hypersonic database, you must manually edit the entry in the database user file to:

- Change the password
- Indicate that the current password is not encrypted
- Indicate that the password needs to be reset

When the user logs in and changes the password, it is then encrypted using the new algorithm.

You can use the same process to reset additional users, or, if there are only a few users, the administrator can reset the passwords directly from the **Users** page on the **Control Panel**.

LDAP connection password encryption changed

For improved security, for storing the password for the LDAP connection, we have changed the security algorithm from to SHA-256.

If you use an LDAP connection for your Studio users, then after you upgrade, you need to re-save the LDAP connection password.

On the **Settings** page of the **Control Panel**, to navigate to the LDAP configuration settings:

1. In the menu to the right of the **Settings** page, click **Authentication**.

2. On the **Authentication** page, click the **LDAP** tab.

The **Credentials** field is located in the **Connection** section of the **LDAP** tab.

Studio data source and filter changes

The following changes are related to the syntax for defining data sources and filters.

[Renamed the `datastoreName` parameter of the data source definition](#)

[RecordFilter no longer supported](#)

Renamed the `datastoreName` parameter of the data source definition

In the data source definition syntax, the name of the `datastoreName` parameter has been changed to `dataDomainName`. This is to reflect a terminology change in Endeca Server.

After you migrate, before you can use any of your existing data sources, you will need to manually update the definitions to change `datastoreName` to `dataDomainName`.

RecordFilter no longer supported

For data source definitions and security filters, `RecordFilter` is no longer supported.

You must update any data source definitions, security filters, and deep link URLs to replace `RecordFilter` with `DataSourceFilter`. For deep link URLs, you can also use the new `SelectionFilter`.

Any existing `RecordFilters` will be ignored.

Studio application (was community) management and component changes

These changes are related to how applications (previously called communities) are managed, as well as to how components are configured.

[New Studio landing page to navigate to applications](#)

[Transition of existing communities to Studio applications after the upgrade](#)

[Removing the Guest application](#)

[Each application is bound to a single data source](#)

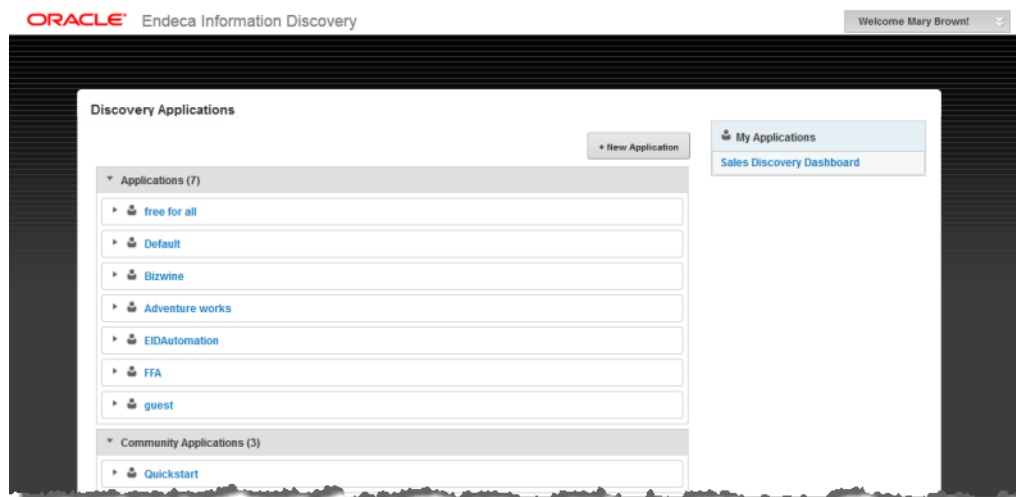
[Resetting the data source binding for upgraded applications](#)

[Effect of the upgrade on Studio components](#)

[Page transitions can only occur within an application](#)

New Studio landing page to navigate to applications

Previously, the Studio menu included a **My Places** option to navigate to other applications, with options to go to either the application's private or public pages. That option has been removed. Instead, a new landing page, titled **Discovery Applications**, lists the applications that the user has access to.



We have also removed the option to display public versus private pages. When users navigate to an application, they see whatever pages they have access to.

Transition of existing communities to Studio applications after the upgrade

When you upgrade to Studio 3.0, any existing communities are changed to Studio applications, and are displayed on the new **Discovery Applications** page.

The application access and membership for these applications is configured as follows:

Existing Community Configuration	Result in the New Application
Community type (Open, Restricted, Private)	<p>Both Open and Restricted communities become Public applications. Public applications can be viewed by all logged-in users.</p> <p>Private communities become Private applications. Private applications can only be viewed by members of the application.</p>

Existing Community Configuration	Result in the New Application
Page visibility type (Open, Public, or Private)	<p>All Open and Public pages become Public pages.</p> <p>All Private pages remain Private pages. Private pages, even if they are within a Public application, can only be viewed by application members.</p> <p>In general, it is recommended that Public applications have all Public pages, and Private applications have all Private pages.</p> <p>Also note that if you change the application type, all pages change to match that type.</p> <p>To change the page visibility type for a specific page, use the Manage Pages option for an application, available from the Applications page on the Control Panel.</p> <p>For details, see the <i>Studio User's Guide</i>.</p>
Community role (Member, Administrator, Owner)	<p>Users who have the Member role for a community are given the Application Member role for the application. Application Members can view but not edit all of the content of an application.</p> <p>Users who have either the Administrator or Owner role for a community are given the Application Administrator role for the application. Application Administrators can:</p> <ul style="list-style-type: none"> • View and edit the content of an application • Assign other users as Application Members • Assign other users as Application Administrators

Removing the Guest application

Previous versions of Studio included the default Guest community, designed to be used by non-logged-in users. It included the **Sign In** component, used to log in to Studio.

When you upgrade, Studio uses the Guest community to create a Guest application.

Because this application will not have a proper administrator, and we no longer allow non-logged-in users to have access to Studio, you should not use this application.

If you had added additional content to the Guest community that you need to maintain, you should replicate that content in a new application, and then delete the Guest application.

Here is one way to do this without having to manually recreate all of the pages and components:

1. Create a new application to contain the pages from the Guest application.
2. Export the pages from the Guest application to a .lar file.
3. Import the pages from the .lar file into the new application.

For details on how to create, edit, and remove applications, and export and import pages, see the *Studio User's Guide*.

Each application is bound to a single data source

Previously, any component on a page could be bound to any available data source. As of 3.0, an entire application is bound to a data source. All components within an application are then bound to that data source.

The exception to this is if an application data source has related data sources (belongs to a hierarchy of parent/child data sources). In this case, individual components within an application can be bound to one of the related data sources.

On the component edit view, if there are no related data sources, then there is no option to select a data source for the component.

When you upgrade Studio, to ensure that all applications refer to a single data source, upgraded applications are automatically bound to your default data source. For information on configuring the data source binding for your upgraded applications, see [Resetting the data source binding for upgraded applications on page 17](#).

Resetting the data source binding for upgraded applications

When you upgrade, because of the new restriction to bind an entire application to a single data source, Studio binds all of your upgraded applications to the default data source, set using the `df.defaultDataSource` Framework Setting. The upgrade process does not immediately change the data source binding for individual components. After the upgrade, you must configure the data source binding for your applications and components.

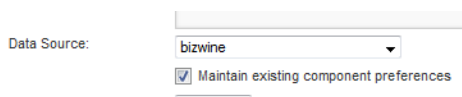
Note that even if your application is already bound to the default data source, if any components in the application are bound to other data sources, you must still re-select the application data source, in order to reset the data source binding for the components.

Before updating the data source binding, make sure that you have updated your data sources to rename the `datastoreName` parameter to `dataDomainName`. See [Renamed the datastoreName parameter of the data source definition on page 14](#).

To update the data source binding, you must either be an Application Administrator for the application, or a Studio administrator.

To bind an upgraded application and components to the correct data source:

1. On the **Discovery Applications** page, click the application you want to update.
The application is displayed.
2. From the Studio menu, select **Application Settings**.
The **Application Settings** page is displayed. The **Application Configuration** option is selected automatically.
3. On the **Application Configuration** page, from the **Data Source** drop-down list, select the data source you want to use.
4. Make sure to check the **Maintain existing component preferences** checkbox.



5. Click **Save**.

The application, and all of its components, are bound to the selected data source. Studio maintains as much of the component configuration as possible.

Note that if you want to re-select the default data source, then in order to get the component configuration to reset correctly, you must first select a different data source. After saving that change, you can then re-select the default data source.

6. If the selected data source has related data sources (is part of a hierarchy of parent/child data sources), then you can bind individual components to one of those related data sources.

If there are related data sources, then the **Application Settings** page includes the **Data Source Bindings** page.

To use the **Data Source Bindings** page to change the data source bound to individual components:

(a) In the **Application Settings** menu, click **Data Source Bindings**.

The **Data Source Bindings** lists the pages and components in the application.

(b) Check the checkbox next to each component that you want to bind to a specific data source.

(c) From the **Select a data source** drop-down list, select the data source to bind to the selected components.

(d) Make sure to check the **Maintain existing component preferences** checkbox.

(e) To complete the change, click **Update data source**.

Effect of the upgrade on Studio components

Here is a summary of how each Studio component in an upgraded application is configured after the upgrade process is completed. This list assumes that you have updated the data source bindings for the application.

Also, the general display of components has been redesigned, with a new component frame and icons.

If you have configured component-specific permissions for components, then those permissions remain in place after the upgrade. However, because we have removed the option to configure permissions for components, you can no longer change permissions at the component level.

For details on how to create and configure components, see the *Studio User's Guide*.

Component	Status After Upgrade	Required Action
Alerts	Displays a message indicating that the component requires additional configuration. Because of the change to data source bindings, Alerts components cannot maintain their previous configuration.	Edit the component to recreate the previous configuration. Note that the individual alert groups can only be bound to data sources that are related to the application data source.
Bookmarks	Maintains the current configuration and bookmarks.	No action required.

Component	Status After Upgrade	Required Action
Chart	Displays a message indicating that the component requires additional configuration. Because of changes to the underlying structure, Chart components cannot maintain their previous configuration.	Edit the component to recreate the previous configuration.
Compare	Reverts to a default configuration, which displays all of the attributes and groups from the Base view of the data source.	Edit the component to recreate the previous configuration.
Component Container	No changes, except to the components within the container.	Update the components within the container as needed.
Cross Tab	Renamed to Pivot Table . Displays a message indicating that the component requires additional configuration. Because of changes to the underlying structure, Pivot Table components cannot maintain their previous configuration.	Edit the component to recreate the previous configuration. Note that the Pivot Table component no longer allows you to provide EQL in order to define the displayed and available metrics and dimensions. Instead, you drag and drop metrics and dimensions into drop zones on the edit view.
Data Explorer	Displays a message indicating that the component has been undeployed. Because of changes to the underlying structure, existing Data Explorer components will not be usable in 3.0.	Remove the existing component, then add it again using the Add Component option.
Guided Navigation	Reverts to a default configuration. Displays all of the attribute groups and attributes in the Base view of the data source.	Update the component configuration as needed to reflect the groups and attributes you want to display. Update the component to replicate the function of any Range Filter components. The Range Filter component has been removed.
Map	Displays a message indicating that the component requires additional configuration. Because of changes to the underlying structure, Map components cannot maintain their previous configuration.	Edit the component to recreate the previous configuration.

Component	Status After Upgrade	Required Action
Metrics Bar	<p>If you did not configure any custom formatting for the metrics, then the Metrics Bar component should maintain its configuration and display correctly.</p> <p>If you had configured custom value formatting, then the Metrics Bar component loses its previous configuration.</p>	If needed, edit the component to recreate the previous configuration.
Range Filter	<p>Displays a message indicating that the component has been undeployed.</p> <p>The Range Filter component has been removed, and its functionality moved to the Guided Navigation component.</p> <p>Existing Range Filter components will not be usable in 3.0</p>	<p>Remove existing Range Filter components.</p> <p>Configure the Guided Navigation component to use the range filter function for the appropriate attributes.</p>
Record Details	Reverts to a default configuration, where the component displays all of the attribute groups and attributes.	Edit the component to recreate the original configuration.
Results List	<p>Displays a message indicating that the component requires additional configuration.</p> <p>Because of changes to the underlying structure, Results List components cannot maintain their previous configuration.</p>	Edit the component to recreate the previous configuration.
Results Table	<p>Reverts to a default configuration.</p> <p>The identifying attributes for each Base view record are persistent columns at the left of the table.</p> <p>Each attribute group is an available column set for the table.</p>	<p>Edit the component to recreate the original configuration.</p> <p>Note that the Results Table no longer supports entering EQL in order to define the columns for an analytics/aggregated table.</p> <p>Instead, you drag and drop metrics and dimensions into drop zones on the edit view.</p>

Component	Status After Upgrade	Required Action
Sample Discovery Portlet	Displays a message indicating that the component has been undeployed. The Sample Discovery Portlet component has been removed. Existing Sample Discovery Portlet components will not be usable in 3.0.	Remove the component.
Search Box	Should maintain its configuration and display correctly.	Note that each search configuration can only be bound to a data source that is related to the application data source.
Sign In	The component does display, but can no longer be added as a standalone component on an application page. All Studio logins are handled from the Studio login page. Users cannot log in from within an application. Users who are not logged in cannot see application pages.	Remove the component.
Tabbed Component Container	No changes, except to the components within the container.	Update the components in the container as needed.
Tag Cloud	Should maintain its configuration and display correctly.	No action needed.

Page transitions can only occur within an application

Previously, for a page transition, you could specify a path to a page in a different application. As of 3.0, because each application is bound to a single data source, you can only specify a page transition to a different page in the same application.

If any page transitions are to different applications, you will need to update them.



Chapter 3

Behavioral Changes in Studio

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

Removed access to the Control Panel for non-administrators

New Application Settings page for configuring applications, views, and attribute groups

Guided Navigation behavior now configured in the View Manager

Formatting centralized for displayed attribute values

Removed access to the Control Panel for non-administrators

For greater security, as of 3.0, users who do not have the Administrator user role can no longer navigate to the Studio **Control Panel**.

Previously, these users could go to the **Control Panel** in order to use the **Applications** and **My Profile** options.

For non-administrators, the Studio menu provides access to their user profile page, and, if applicable, options for displaying the current application.

New Application Settings page for configuring applications, views, and attribute groups

Managing the data source views and attribute groups is now performed within the context of an application.

A new **Application Settings** option in the Studio menu displays the **Application Settings** page for the currently displayed application. The option is available to users who are either administrators or owners of the current application.

This page contains links to:

- A new **Application Configuration** page
- The **Data Source Bindings** page, if the application data source has related data sources
- The **View Manager**
- The **Attribute Group Manager**, which replaces the previous **Attribute Settings** page.

These options have been removed from the **Control Panel**.

Guided Navigation behavior now configured in the View Manager

The behavior of an attribute on the **Guided Navigation** component (refinement behavior and value ordering) is now configured in the Base view on the **View Manager**.

Previously, these options were configured on the **Attribute Settings** page, which has been replaced by the **Attribute Group Manager**.

Formatting centralized for displayed attribute values

As of 3.0, the formatting for attribute values has been centralized on the **View Manager**.

You configure the default format for each attribute on the **View Manager**. On the component edit view, you then have more limited options for customizing that default format.

Previously, when formatting values on the component edit view, you could select any format type.