Endeca® Latitude

Quick Start Guide
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Contents

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Preface

Endeca® Latitude applications guide people to better decisions by combining the ease of search with the analytic power of business intelligence. Users get self-service access to the data they need without needing to specify in advance the queries or views they need. At the same time, the user experience is data driven, continuously revealing the salient relationships in the underlying data for them to explore.

The heart of Endeca's technology is the MDEX Engine.™ The MDEX Engine is a hybrid between an analytical database and a search engine that makes possible a new kind of Agile BI. It provides guided exploration, search, and analysis on any kind of information: structured or unstructured, inside the firm or from external sources.

Endeca Latitude includes data integration and content enrichment tools to load both structured and unstructured data. It also includes Latitude Studio, a set of tools to configure user experience features including search, analytics, and visualizations. This enables IT to partner with the business to gather requirements and rapidly iterate a solution.

About this guide

This guide discusses how to get a basic Endeca Latitude 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 Latitude Studio application.

Conventions used in this guide

This guide uses the following typographical conventions:

Code examples, inline references to code elements, file names, and user input are set in `monospace` font. In the case of long lines of code, or when inline monospace text occurs at the end of a line, the following symbol is used to show that the content continues on to the next line: ¬

When copying and pasting such examples, ensure that any occurrences of the symbol and the corresponding line break are deleted and any remaining space is closed up.

Contacting Endeca Customer Support

The Endeca Support Center provides registered users with important information regarding Endeca software, implementation questions, product and solution help, training and professional services consultation as well as overall news and updates from Endeca.

You can contact Endeca Standard Customer Support through the Support section of the Endeca Developer Network (EDeN) at *http://eden.endeca.com*.

Chapter 1

About Endeca Latitude

This section discusses the Endeca Latitude platform.

Overview of Endeca Latitude

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

Endeca Latitude consists of the following modules:

- Self-service composition and configuration of applications, views and dashboards—by business analysts—through **Latitude Studio**.

- Search, Guided Navigation™, and analytics capabilities powered by the **MDEX Engine**.

- A comprehensive **Information Integration Suite**, featuring an enterprise ETL solution, **Latitude Data Integrator**, which includes connectors for standard structured and unstructured data sources, a comprehensive data enrichment library, and a direct connector to the MDEX Engine.

Chapter 2

Installing Endeca Latitude

This chapter outlines the installation required to explore the Latitude Sample Application.

Downloading the Latitude software

You can download the Latitude 2.2.x for Windows All-in-One installer from the Downloads section of the Endeca Developer Network (EDeN).

To download the Latitude All-in-One installer:

1. If you have not previously done so, establish a Support account with download access through the Support section of the Endeca Developer Network (EDeN) at *http://eden.endeca.com*. This enables the Endeca Support and Customer Care groups to track which versions of the software you are using.
2. On the EDeN homepage, click **Downloads**.
3. On the **Tools and Utilities** page, find the **Product Downloads** section, then click **View and download purchased products**.
4. On the **Product Downloads** page, click **Latitude 2**.
5. In the **Current Releases** table, click **Installation and Quick Start**.

   📝 **Note:** The first time you select a Latitude 2.2.x component to download, you have to click **I agree** to accept the license agreement before proceeding to the actual download page.

6. From the **Product Download** page, download the **Latitude 2.2.x for Windows (All-in-One Installer)** (`Latitude_2.2.x_AllinOne_Installer.exe`).

Running the Latitude All-in-One Installer

Once you have downloaded the Latitude All-in-One Installer, you can begin installing the Latitude modules. In this installation scenario, you do not need to set up any automated services, such as process monitoring, automated backups, or log management. For information on those tasks, see the *Latitude Administrator's Guide*.

⭐ **Important:** This installation procedure assumes you are working off a 64-bit, dual-core Windows machine with administrator privileges that has never had Latitude installed on it. If you have a

previous version of Latitude installed on your machine, you will need to uninstall it and delete any existing Endeca directories (e.g. `C:\Endeca`) before beginning this procedure.

The Latitude All-in-One Installer will set your CATALINA_HOME environment variable to point to the Apache Tomcat server that is included with Latitude Studio. It will overwrite 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 Latitude.

To install Latitude 2.2.x:

1. Double-click `Latitude_2.2.x_AllinOne_Installer.exe`.

   The **InstallAware Wizard** window appears.

2. When the **InstallAware Wizard** finishes verifying the contents of the installation package, click **Next**.

   The **License Agreement** screen displays.

3. Read through the license agreement. If you agree to the license terms and conditions, check **I agree to these terms and conditions**, then click **Next**.

   The **Important Information** screen displays.

4. Read through the important information, then click **Next**.

   The **InstallAware Wizard** indicates it is ready to begin installation of Latitude 2.2.x.

5. If you are ready to begin installation, click **Next**.

   The **InstallAware Wizard** begins installation of Latitude 2.2.x. When it completes, a screen displays indicating that the installation has finished.

   ✏️ **Note:** The installation process will take several minutes.

6. If you wish to visit the Latitude Enablement Portal after the installation finishes to view technical documentation and video tutorials on the Latitude product, leave **Go to the Latitude Enablement Portal now** checked. Otherwise, uncheck the box.

7. Click **Finish**.

   Latitude 2.2.x is now installed on your computer. If you left **Go to the Latitude Enablement Portal now** checked, a browser window will open.

After you have finished the installation, open **Windows Explorer** and navigate to `C:\Endeca\Latitude\2.2.x`. This directory, created during the installation, should have three sub-folders: `DataIntegrator`, `MDEX`, and `Studio`.

You should also see an **Endeca** directory when you choose **Start** > **All Programs**.

Adding the Latitude Sample Application files to an existing Latitude 2.2.x installation

If you followed the installation procedure described in the *Latitude Installation Guide*, which instructs you to install each Latitude module separately, you will need to download the Latitude Sample Application files separately and place them in the correct directory.

You must have all three Latitude 2.2.x modules installed on your Windows machine before beginning this procedure.

Important: If you have installed Latitude using the Latitude All-in-One Installer, you should not follow this procedure. You can continue to the next chapter, "Provisioning the Latitude Sample Application."

To add the Latitude Sample Application files to an existing Latitude 2.2.x installation:

1. Log in to your EDeN account.
2. On the EDeN homepage, click **Downloads**.
3. On the **Tools and Utilities** page, find the **Product Downloads** section, then click **View and download purchased products**.
4. On the **Product Downloads** page, click **Endeca Latitude 2**.
5. In the **Current Releases** table, click **Installation and Quick Start**.
6. From the **Installation and Quick Start** page, download the **Quick Start Project** (`Latitude_2.2.x_QuickStart.zip`).
7. Extract this folder to `C:\`.

   This creates the following directory structure:
   `C:\Endeca\Latitude\2.2.x\QuickStart\studio.`

Now that you have downloaded the Latitude Sample Application files, you can continue through this guide to learn how to provision and explore the Latitude Sample Application on your Latitude installation.

Chapter 3

Provisioning the Latitude Sample Application

This section walks you through running the Latitude sample project pipeline to load the data into the MDEX Engine, and then exploring the Latitude Sample Application in Latitude Studio.

Loading the sample data

You load the sample data using the Latitude Data Integrator.

Starting the Latitude Data Integrator

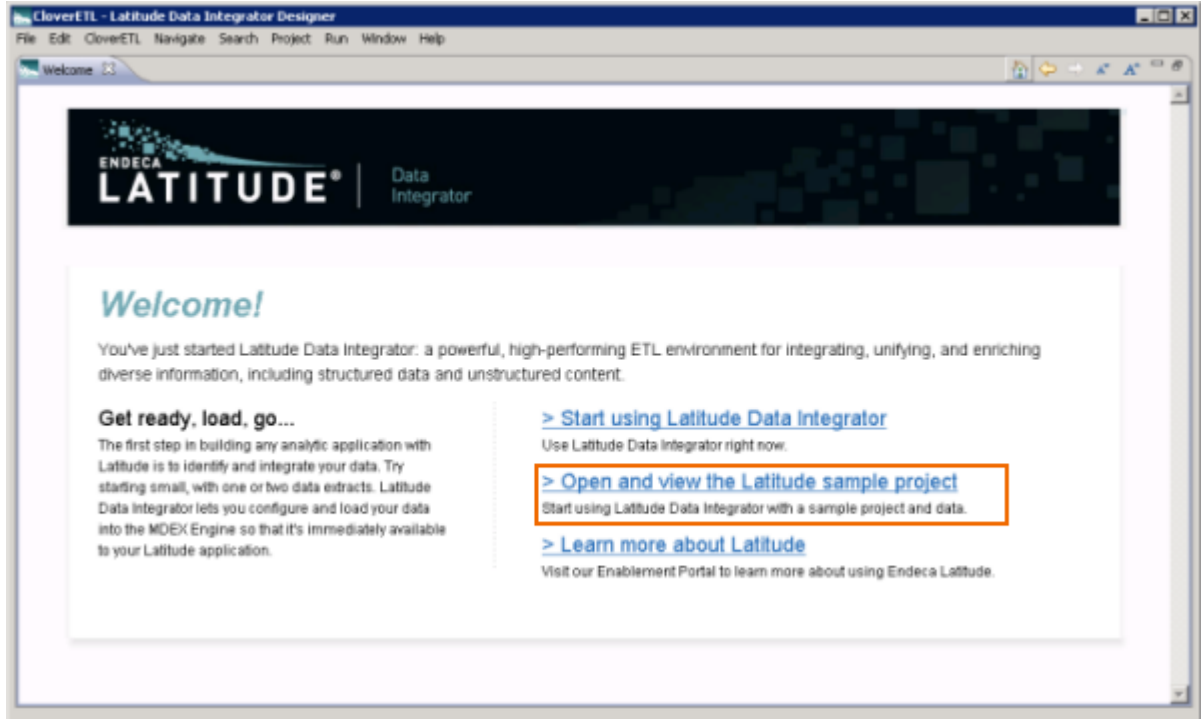In order to run the Latitude Quick Start project pipeline, you must launch the Latitude Data Integrator.

To start the Latitude Data Integrator:

1. Choose **Start** > **All Programs** > **Endeca** > **Latitude 2.2.x** > **Latitude Data Integrator Designer**. The Latitude Data Integrator splash screen displays first, followed by the **Workspace Launcher** dialog box.
2. Click **Browse** to select a workspace location, or click **OK** to accept the default location.

   > 🖉 **Note:** The **workspace** is the folder in which Latitude Data Integrator stores all your project files. If you wish to use the same folder each time you run the Latitude Data Integrator, check **Use this as the default and do not ask again** before clicking **OK**.

3. The first time you launch the Latitude Data Integrator, the Welcome screen displays, as pictured. Click **Open and view the Latitude sample project** (highlighted).

Note: If you wish to return to this Welcome screen at any point while you are in the Latitude Data Integrator workspace, choose **Help** > **Welcome**.
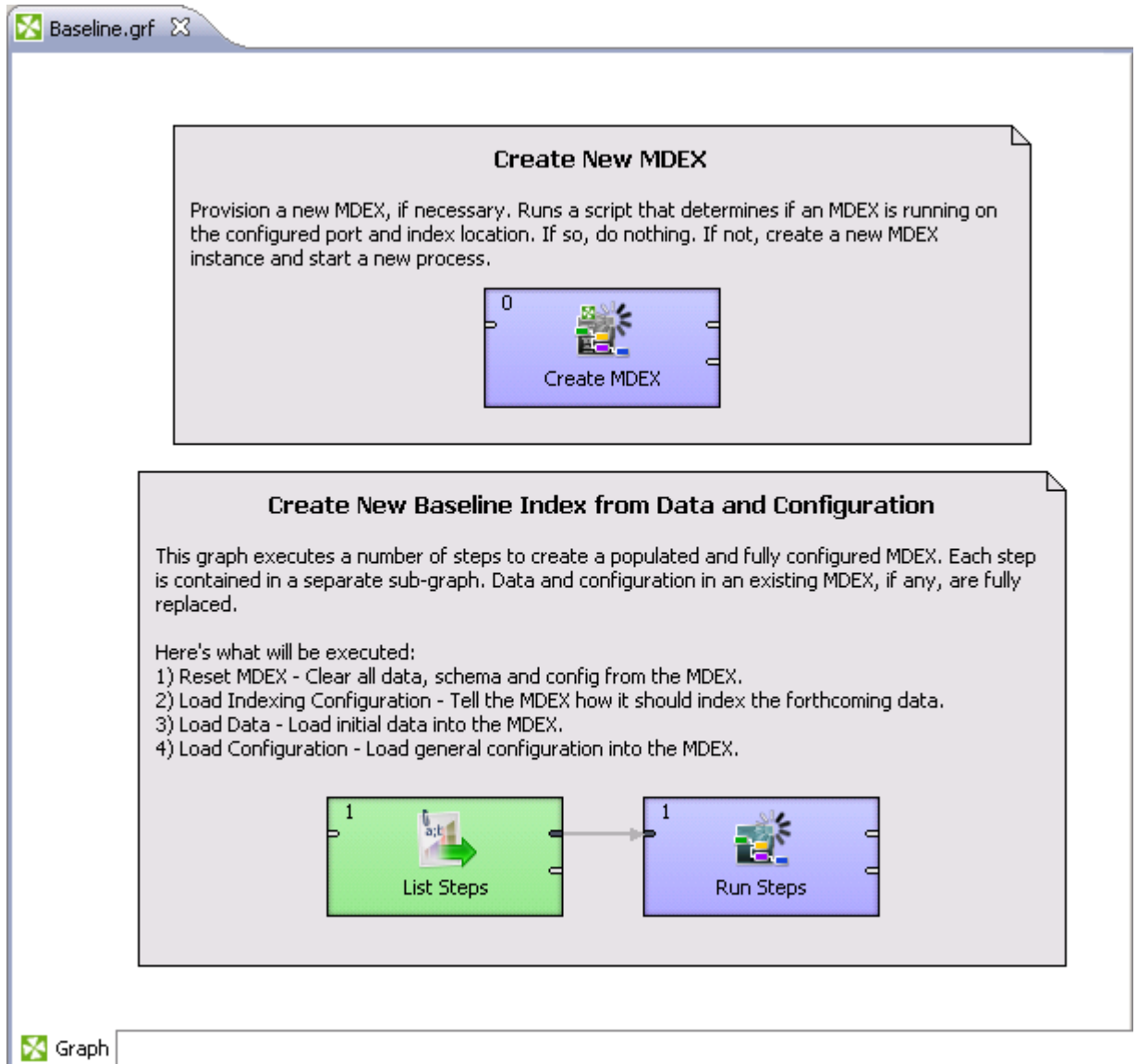
The Latitude Data Integrator workspace opens, loaded with the Latitude Quick Start project, as pictured.
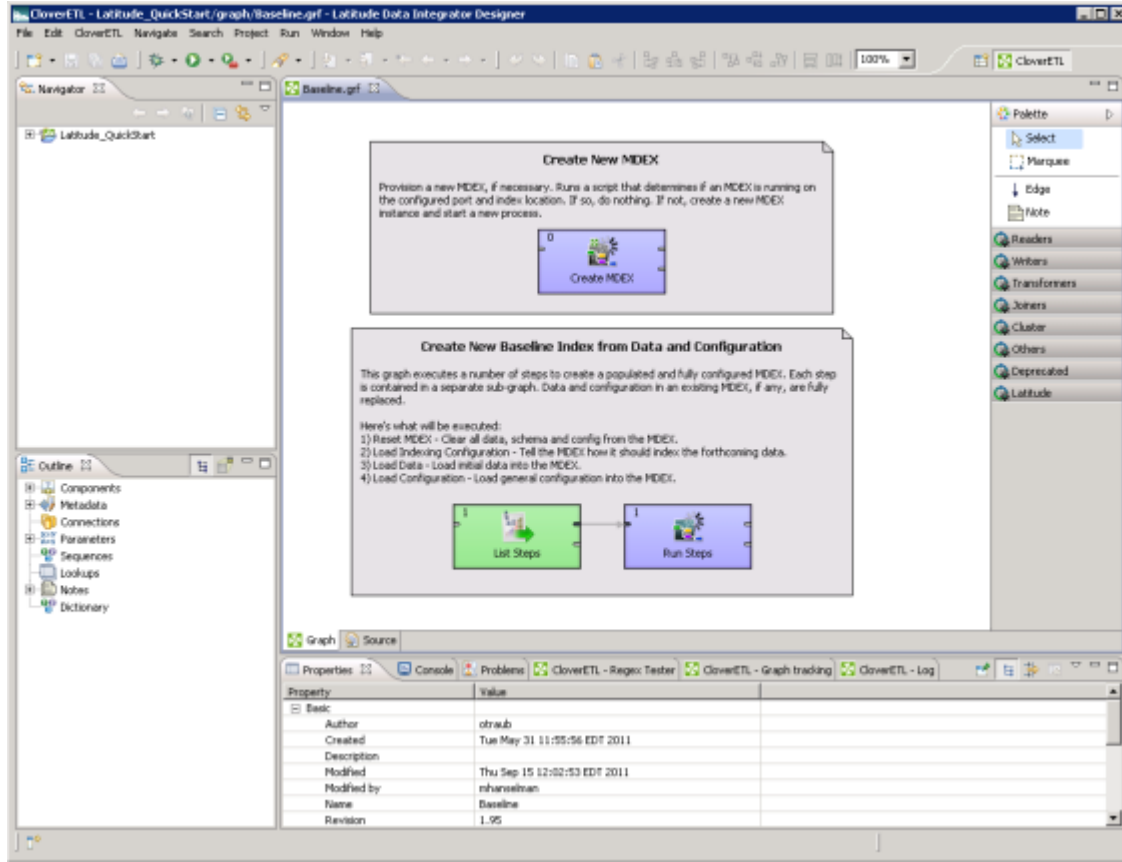
Running the pipeline project

This topic discusses how to run the pipeline for the sample application.

Make sure `Baseline.grf` is open in the Latitude Data Integrator, as pictured, and that the `Latitude_Quickstart` project appears in the **Navigator** pane.
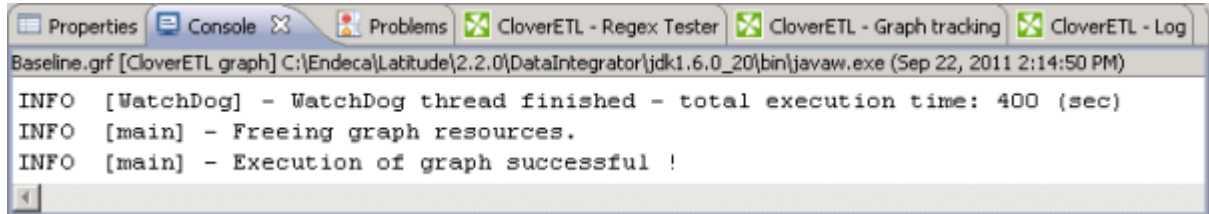
To run the pipeline project:

1. Click anywhere in the gray box around the **Create New Baseline Index From Data and Configuration** graph to give it focus (indicated by a black line around the box), then click **Run**

    .

    The Latitude Data Integrator processes `Baseline.grf`, which initializes a new, empty MDEX Engine instance and loads the data and configuration for the Latitude Sample 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.

```
INFO   [WatchDog] - WatchDog thread finished - total execution time: 400 (sec)
INFO   [main] - Freeing graph resources.
INFO   [main] - Execution of graph successful !
```

2. When the graph processing completes, close the Latitude Data Integrator.

> **Note:** You will need to re-run this graph every time you restart your machine.

Importing the Latitude Sample Application

Now that the data and configuration is loaded into the MDEX Engine, you can run Latitude Studio and import the Latitude Sample Application.

Starting Latitude Studio

You must start the Latitude Studio server and log in to Latitude Studio in order to import and explore the Latitude Sample Application.

> **Important:** The Latitude 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 Latitude Studio.

To start Latitude Studio:

1. Choose **Start** > **All Programs** > **Endeca** > **Latitude 2.2.x** > **Start Latitude Studio Server**.

   A command window opens, displaying log messages for the server start-up process. This process will take several minutes to complete. When the server is standing, you will see a message like 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 Latitude Studio.

2. Once the server is standing, choose **Start** > **All Programs** > **Endeca** > **Latitude 2.2.x** > **Latitude Studio**. Alternatively, you can open a browser and go to http://localhost:8080.

   The Latitude Studio login page opens in a browser window.

3. Log into Latitude Studio using the default login and password:
   - **Email Address** = test@endeca.com
   - **Password** = test

Importing the sample application

In order to begin exploring the Latitude Sample Application in Latitude Studio, you must import the appropriate LAR file.

To import the Latitude Sample Application LAR file:

1. Hover over the arrow button next to **Welcome Test Test!** (located in the top right corner of the screen).

   A drop-down menu displays.
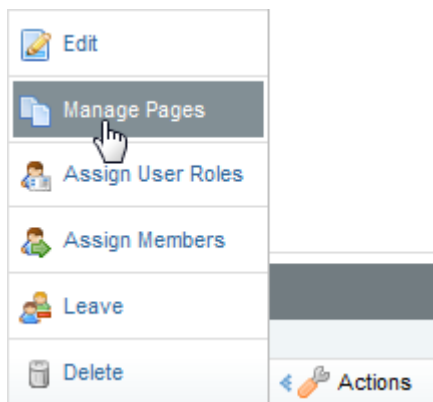
2. Click **Control Panel**.
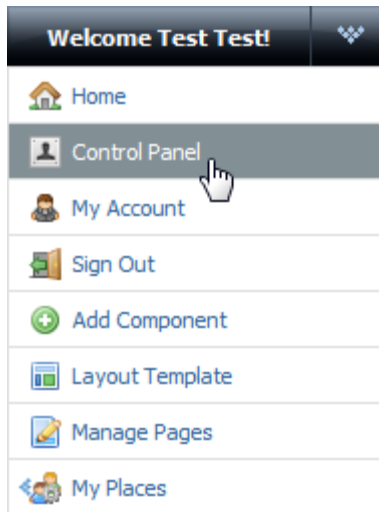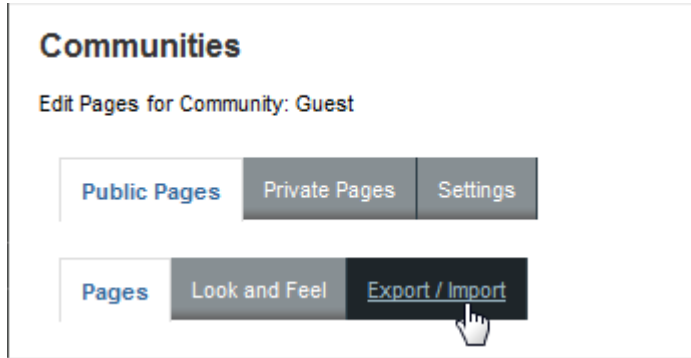

   The **Latitude Studio Control Panel** displays.

3. Click **Communities** (located under the **Portal**, in the left-hand menu).

   The **Communities** pane displays.

4. In the **Communities** pane, choose **Actions** > **Manage Pages**.

5. Click **Export/Import**.

6. Click **Import**.
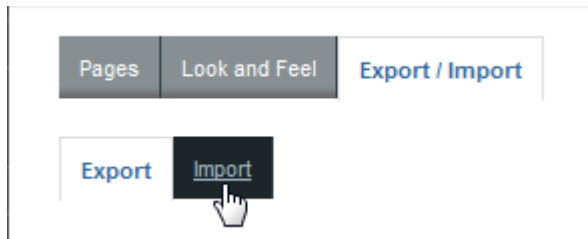
The **Import** page displays.

7. On the **Import** page, Click **Browse** and navigate to the Latitude Sample Application LAR file (`sample_app.lar`) located at `C:\Endeca\Latitude\2.2.x\Studio\examples`. Leave the check boxes as they are.

> **Note:** If you added the Latitude Sample Application files to an existing Latitude 2.2.x installation, you will have to import `sample_app.lar` from `C:\Endeca\Latitude\2.2.x\QuickStart\studio`.

8. Click **Import**.

Latitude Studio displays the following confirmation message.

9. Click **Back to Guest** to close the Control Panel and return to the Latitude Studio Sample Application.

Now that you have imported the LAR, you should see two new page tabs:
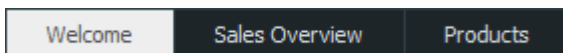
Chapter 4

Exploring the Latitude Sample Application

In this section, you'll explore the Latitude Sample Application in Latitude Studio.

About the Latitude Sample Application

The Latitude Sample Application demonstrates Endeca Latitude in action, using sales and product data from a fictitious bicycle manufacturer.

Endeca customers can rapidly and iteratively deploy applications like the Latitude Sample 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 Endeca's patented search and Guided Navigation™ technology, Endeca Latitude provides visibility and better decision-making capabilities to a broad range of business users.

You can experience Endeca Latitude by using the Latitude Sample Application to analyze the performance of resellers and products across a wide variety of dimensional attributes.
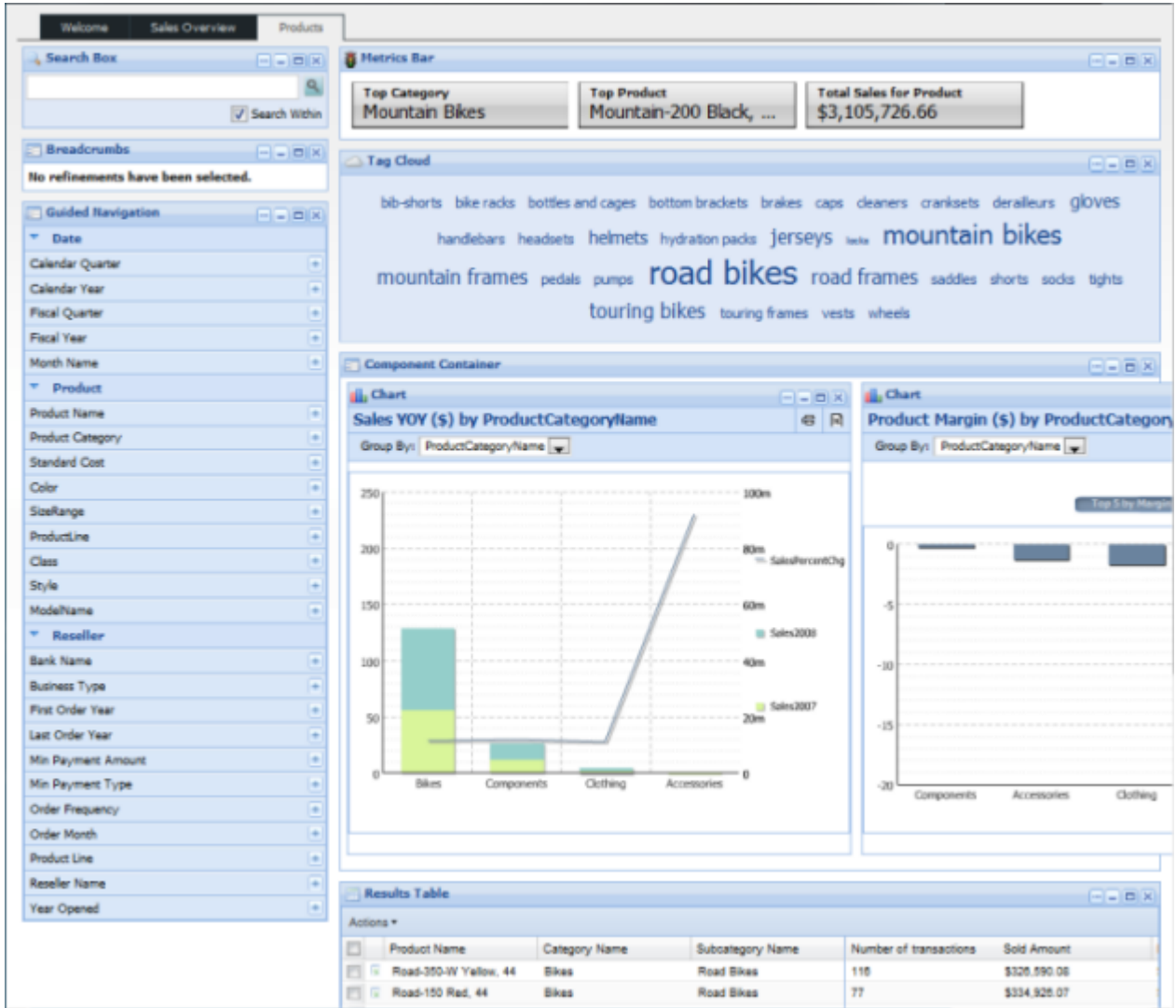
Overview of the Latitude Sample Application

This topic provides an overview of the Latitude Sample Application.

In addition to the Welcome page, the Latitude Sample Application contains two pages: **Sales Overview** and **Products**.
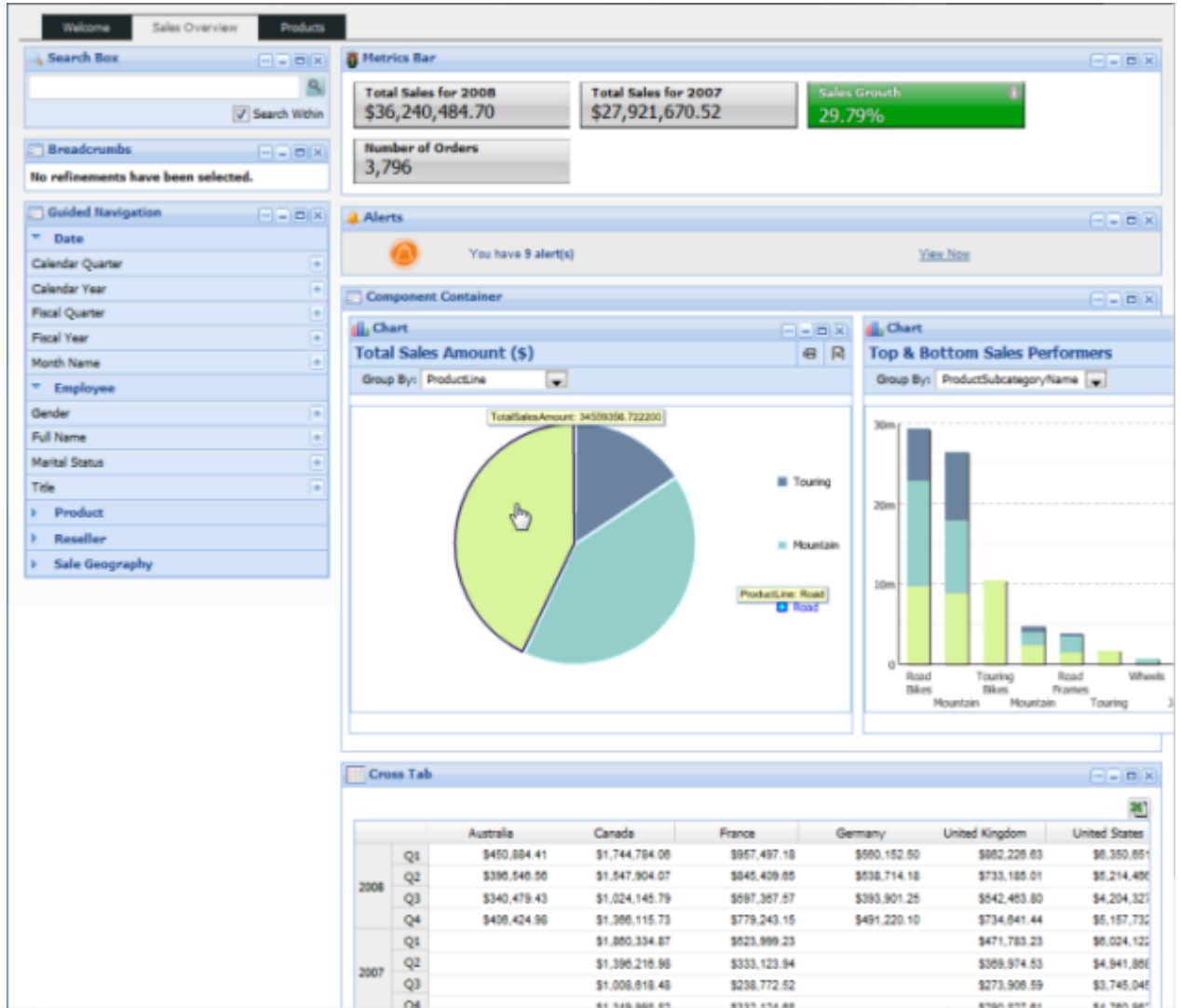
The **Sales Overview** page (above) presents a dashboard which focuses on sales figures.

The **Products** page (above) provides record-level detail and product comparisons.

Chapter 5

Next Steps

This section describes the next steps you can take with Endeca Latitude after you explore the Latitude Sample Application.

Obtaining more information

This topic describes additional Endeca resources that can help you be successful with Endeca Latitude.

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 Endeca Latitude guides to find more specific in-depth information:

If you are...	See this guide...
Any user who needs to learn more about Latitude terminology	The *Latitude Glossary* contains definitions for Latitude modules, concepts and terms.
An administrator who needs to install Latitude, or learn about system requirements or platform support	The *Latitude Installation Guide* contains platform support information and detailed installation instructions for all installation environments that are currently supported.
An administrator who needs to know how to administer and maintain the MDEX Engine and Latitude Studio	The *Latitude Administrator's Guide* provides information about various administrative tasks, such as job monitoring, capturing snapshots, and deploying Latitude in a cluster, associated with the MDEX Engine and Latitude Studio.
An ETL developer or data architect who needs to load data into Latitude	The *LDI MDEX Engine Components Guide* describes how to load data. In addition, the *Latitude Data Ingest API Guide* describes the Data Ingest Web Service API used by the Latitude Data Integrator.
A developer who needs to know about features of Latitude such as search, refinements, search interfaces, or thesaurus	The *Latitude Developer's Guide* describes the core features of the Endeca MDEX Engine that you can access via applications built with Latitude Studio. It covers basic concepts, working with records and attributes, and search configuration.
An application developer who needs to configure the behavior of	The *Latitude Studio User's Guide* describes how to configure the Latitude Studio framework and components.

If you are...	See this guide...
various components in Latitude Studio	
A developer who needs to know about the APIs for the MDEX Engine, or how to extend Latitude Studio	The *Latitude Developer's Guide* describes the Endeca Web Services used by the Latitude Studio. It also contains a section describing how to extend Latitude Studio. In addition, see the *API Reference* for information about Web services and schemas that are packaged with the MDEX Engine. It is located in the `doc/wsdl` and `doc/xsd` directories of the MDEX Engine installation. For information about extending Latitude Studio, see the *Latitude Studio Javadoc*, which is packaged with the rest of the Latitude documentation.

You can access the Latitude documentation in two ways:

- A searchable hosted version is available in the Knowledge Base of the *Endeca Developer Network (EDeN)*.
- A full downloadable version is available in the *Downloads* section of EDeN.

Endeca Latitude forums

You can obtain more information about Latitude and other Endeca products at the Endeca Developer Network (EDeN) at *http://eden.endeca.com*. In particular, EDeN's forums provide discussions for technical and business users, including topics such as development, extension, deployment, and configuration. Further, the Endeca Encyclopedia features a *Latitude 2 Enablement Wiki*.

Endeca Education

To get the most out of your Endeca technology investment, consider Latitude training. Endeca Latitude training is designed for customers using Endeca for Agile BI. Learning paths have been created for the various roles within Latitude projects, including business analyst, data architect, and system administrator. For more information, see *Latitude Role-based Enablement Plans*.

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