

Endeca® Developer Studio

Installation Guide

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ENDECA

Contents

- Preface.....7**
- About this guide.....7
- Who should use this guide.....7
- Conventions used in this guide.....8
- Contacting Oracle Support.....8

- Chapter 1: Installation for Endeca Developer Studio.....9**
- Before you install.....9
 - About Developer Studio.....9
 - System requirements.....9
 - Compatibility with Endeca components.....10
 - Required reading.....10
- Installing Endeca Developer Studio.....11
 - Installation steps.....11
 - Silent installation steps for Windows.....11
 - Verifying your Developer Studio installation.....11

- Chapter 2: Changing the Developer Studio configuration13**
- Changing to another Endeca Workbench.....13
- Pipeline paths in an Endeca Application Controller environment14
- About temporal properties.....14
 - Configuring Developer Studio for the use of Duration and Time property types14

- Chapter 3: Uninstalling Developer Studio.....17**
- Steps to uninstall Developer Studio on Windows.....17



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Preface

Oracle Endeca's Web commerce solution enables your company to deliver a personalized, consistent customer buying experience across all channels — online, in-store, mobile, or social. Whenever and wherever customers engage with your business, the Oracle Endeca Web commerce solution delivers, analyzes, and targets just the right content to just the right customer to encourage clicks and drive business results.

Oracle Endeca Commerce is the most effective way for your customers to dynamically explore your storefront and find relevant and desired items quickly. An industry-leading faceted search and Guided Navigation solution, Oracle Endeca Commerce enables businesses to help guide and influence customers in each step of their search experience. At the core of Oracle Endeca Commerce is the MDEX Engine,™ a hybrid search-analytical database specifically designed for high-performance exploration and discovery. The Endeca Content Acquisition System provides a set of extensible mechanisms to bring both structured data and unstructured content into the MDEX Engine from a variety of source systems. Endeca Assembler dynamically assembles content from any resource and seamlessly combines it with results from the MDEX Engine.

Oracle Endeca Experience Manager is a single, flexible solution that enables you to create, deliver, and manage content-rich, cross-channel customer experiences. It also enables non-technical business users to deliver targeted, user-centric online experiences in a scalable way — creating always-relevant customer interactions that increase conversion rates and accelerate cross-channel sales. Non-technical users can control how, where, when, and what type of content is presented in response to any search, category selection, or facet refinement.

These components — along with additional modules for SEO, Social, and Mobile channel support — make up the core of Oracle Endeca Experience Manager, a customer experience management platform focused on delivering the most relevant, targeted, and optimized experience for every customer, at every step, across all customer touch points.

About this guide

This guide contains installation instructions for setting up Developer Studio on Windows.

This guide assumes that you have read the *Endeca Quick Start Guide*. This guide covers installation of Endeca Developer Studio; for information about installing other Endeca components, refer to the appropriate Installation Guide. Endeca Developer Studio is a Windows-only application.



Note: Unless otherwise indicated, whenever this document specifies IAP Workbench, it applies to any of the Endeca Workbench tool suites.

Who should use this guide

This guide is intended for developers who are building applications using the Endeca Information Access Platform, as well as for system administrators managing Endeca applications.

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 Oracle Support

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

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



Chapter 1

Installation for Endeca Developer Studio

This section contains instructions for installing Developer Studio.

Before you install

This section provides an overview of Endeca Developer Studio, system requirements, and other information you need to know before installing.

About Developer Studio

Developer Studio is a Windows application that you use to define all aspects of your instance configuration including pipeline components, Endeca properties and dimensions, precedence rules, dynamic business rules, and user profiles.

With Developer Studio, you can define:

- Pipeline components for tasks such as loading, standardizing, joining, mapping, and exporting data.
- Endeca properties and property attributes such as sort and rollup.
- Dimensions and dimension values, including dimension hierarchy.
- Precedence rules among dimensions that provide better control over your implementation's navigation flow.
- Search configurations, including which properties and dimensions are available for search.
- Dynamic business rules that allow you to promote certain records on your Web site using data-driven business logic. Dynamic business rules are used to implement merchandising and content spotlighting.
- User profiles that tailor the content returned to an end-user based upon pre-configured rules.

Developer Studio uses a project file, with an `.esp` extension, that contains pointers to the XML files that support an instance configuration.

System requirements

Developer Studio is only available for Windows and has the following requirements:

Minimum hardware requirements:

- x86 or x64 compatible processor, minimum 1.8 Ghz
- At least 1 GB of RAM, depending on the size of the application data set
- 80 GB hard drive

Recommended hardware requirements:

- x86 or x64 3.0+ Ghz processor; Endeca recommends Intel Xeon, AMD Opteron, or Intel Dual Core Pentium (x86 only) processors
- 2 GB of RAM or more, depending on the size of the application data set
- One 80 GB hard drive per CPU, minimum 10,000 RPM spindle speed
- Gigabit ethernet

The Endeca Developer Studio software installs to approximately 50 MB. Because multiple versions of Developer Studio can be stored, a large hard drive is recommended.

Supported Operating Systems

- Windows Server 2003
- Windows XP

Compatibility with Endeca components

To determine the compatibility of Developer Studio with other components in Oracle Endeca Commerce, see the *Oracle Endeca Commerce Compatibility Matrix* available on the Oracle Technology Network.

Required reading

Before installing, Endeca recommends that you read the following documents for important information about the release.

Quick Start Guide

The *Endeca Quick Start Guide* gives an overview of Endeca components and includes information about configuration scenarios. After installing all the components in your Endeca deployment, read this guide for information on verifying your installation. You can download the *Endeca Quick Start Guide* from the Oracle Technology Network.

Release Notes

Refer to the Endeca release notes for information about new features, changed features, and bug fixes for this release. You can download the release notes (`README.txt`) from the Oracle Technology Network. After installation, release notes are also available in `DeveloperStudio\version\README.txt` or from **Start > Programs > Endeca > Developer Studio > Release Notes**.

Migration Guide

Refer to the *Platform Services Migration Guide* for information about migrating your implementation from a previous version of Endeca software. You can download the *Platform Services Migration Guide* from the Oracle Technology Network. After installation, the Migration Guide is also available in `DeveloperStudio\version\help\basic`.

Installing Endeca Developer Studio

This section describes the installation procedure.

Installation steps

Developer Studio is available from the Oracle Software Delivery Cloud.

To install Developer Studio:

1. In your local environment, locate the Endeca Developer Studio installer that you downloaded.
2. Double-click the installer file: `dstd_version_i86pc-win32.exe`.
3. Click **Next** to begin the installation wizard.
4. On the Copyright and legal screen, click **Next**.
5. In the License Agreement screen, select **I accept the terms in the license agreement**, then click **Next**.
6. In the Destination Folder screen, either accept the default location or click **Change** and browse to the directory where you want to install the Endeca software. Oracle recommends that you accept the default location (`C:\Endeca\DeveloperStudio`). When you have finished, click **Next**.



Note: If you do not use the default location, and you are installing more than one Endeca product on the same machine, ensure that you install each product to a separate location.

7. In the **Ready to Install the Program** screen, click **Install**.
8. When the installation is complete, click **Finish**.

Silent installation steps for Windows

The silent installer is useful if you want to add the installation of Developer Studio to your own install script, or push out the installation on multiple machines.

The silent installer is not interactive and is available for Windows only.

To launch the silent installer:

1. Open a command prompt and navigate to the directory where you downloaded the installer.
2. Issue the following command:

```
dstd_version_arch-OS.exe /s /v" /qn
INSTALLDIR="C:\Endeca\DeveloperStudio\"
```

You can replace `C:\Endeca\DeveloperStudio\` with the location to which you want to install.

Verifying your Developer Studio installation

You can verify the success of the installation by running the Developer Studio program.

To start Developer Studio:

1. Navigate to the `DeveloperStudio\version` directory.
For example, `C:\Endeca\DeveloperStudio\6.0.1`

2. Double-click `EStudio.exe`.

The Developer Studio program opens.

The Developer Studio program is also available from **Start > Programs > Endeca > Developer Studio > Developer Studio *version*** or from a desktop shortcut created by the installer.



Chapter 2

Changing the Developer Studio configuration

This section describes tasks for configuring Developer Studio. For complete information on the pipeline development and instance configuration tasks that you can perform in Developer Studio, see the *Endeca Developer Studio Help*.

Changing to another Endeca Workbench

If you have more than one Endeca Workbench running in your implementation, you can change the connection from one instance of Endeca Workbench to another one.

Before continuing, make sure that the target Endeca Workbench is running and has been provisioned with your Endeca application.



Note: Both Endeca Workbench instances must be the same software version.

To change the connection between Developer Studio and Endeca Workbench:

1. Start Developer Studio and open your project.
2. From the **Tools** menu, choose **IAP Workbench Settings**.
The Endeca IAP Workbench Settings dialog box appears, showing the current settings for the host and port of the machine that is running Endeca Workbench.
3. In the **Host** field, enter the name or IP address of the host on which the target Endeca Workbench is running.
4. In the **Port** field, enter the port on which the target Endeca Workbench is listening.
5. In the **Application** field, select an application to associate the Developer Studio project with.
6. Click **OK**.
7. Save the project.
8. Click **Set Instance Configuration**.
Developer Studio sends the instance configuration to the target Endeca Workbench.

Pipeline paths in an Endeca Application Controller environment

When using a `Pipeline.epx` file in an environment controlled by the Endeca Application Controller, pipeline paths for incoming data are treated as follows:

- Relative paths in the pipeline are resolved in relation to the directory path you entered in the **Incoming Directory** field for hosts, components and scripts on the EAC Administration page in IAP Workbench.
- Absolute paths are not changed and are used exactly as specified.

About temporal properties

Time and date properties are defined like other property types in Endeca Developer Studio.

The Property editor provides three temporal property types:

- **DateTime** values represent a time of day on a given date
- **Duration** values represent a length of time
- **Time** values represent a time of day

The DateTime property type is available by default in Developer Studio. The Duration and Time property types, which are intended mainly for use with Endeca Analytics, are not supported in the default version of Developer Studio.

Configuring Developer Studio for the use of Duration and Time property types

Developer Studio is configured through the `EStudio.ini` file, located in the `conf` directory of the Developer Studio installation.

Settings in this file are read at startup. The `EStudio.ini` file accepts two configuration options, *latitude* and *classicForge*, each of which may be set to 0 (zero) or 1.

To Configure Developer Studio for Duration and Time properties:

1. Navigate to Developer Studio's `conf` directory.

For example:

```
C:\Endeca\DeveloperStudio\6.0.3\conf
```

2. Open `EStudio.ini` in a text editor.
3. Edit the file so that it contains the following settings:

```
[startup]
latitude=1
classicForge=1
```

4. Copy the entire contents of the directory `template\Basic Pipeline` to the directory `template_Latitude\Basic Pipeline`, overwriting existing files.

5. Open the `project.esp` file in the `template_Latitude\Basic Pipeline` directory in a text editor. Just above the line `</STUDIO_PROJECT>`, which is located near the end of the file, add the following line:

```
<PROJECT_FILE TYPE="VIEWS" URL="template.views.xml" />
```

6. Save and close the file.
7. Create a `Latitude` directory in the `help` directory of Developer Studio. A sample path for this directory might be:

```
C:\Endeca\DeveloperStudio\6.0.3\help\Latitude
```

8. Copy the contents of the `help\basic` directory to the new `Latitude` directory.
9. Launch Developer Studio and open your project file.
10. In the Project Explorer, double-click on **Properties**.
11. Create a new property or edit an existing property.

In the Type drop-down list, the Duration and Time property types are now available.



Note: Once you have added properties with a Duration or Time type, the project cannot be opened by a Developer Studio instance with the default configuration.



Chapter 3

Uninstalling Developer Studio

This section contains the procedures for uninstalling the Developer Studio package.

Steps to uninstall Developer Studio on Windows

Follow these steps to uninstall Developer Studio from your Windows machine.

Before you begin the uninstall process, back up files that you want to retain from the Developer Studio directory.

To uninstall Developer Studio from your Windows machine:

1. From the Windows Control Panel, select **Add or Remove Programs**.
2. Select Endeca Developer Studio from the list of installed software.
3. Click **Remove** and follow the prompts.

Index

I

installation 11
 verifying 11

O

overview
 Developer Studio 9

P

Pipeline paths 14
prerequisites 10

S

system requirements 10

T

temporal properties 14
 configuring 14

U

uninstalling
 on Windows 17

W

Workbench 13

