

Endeca® Developer Studio

Installation Guide



Contents

- Preface.....7**
 - About this guide.....7
 - Who should use this guide.....7
 - Conventions used in this guide.....7
 - Contacting Endeca Customer 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.....12
- 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



Copyright and disclaimer

Product specifications are subject to change without notice and do not represent a commitment on the part of Endeca Technologies, Inc. The software described in this document is furnished under a license agreement. The software may not be reverse engineered, decompiled, or otherwise manipulated for purposes of obtaining the source code. The software may be used or copied only in accordance with the terms of the license agreement. It is against the law to copy the software on any medium except as specifically allowed in the license agreement.

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose without the express written permission of Endeca Technologies, Inc.

Copyright © 2003-2010 Endeca Technologies, Inc. All rights reserved. Printed in USA.

Portions of this document and the software are subject to third-party rights, including:

Corda PopChart® and Corda Builder™ Copyright © 1996-2005 Corda Technologies, Inc.

Outside In® Search Export Copyright © 2008 Oracle. All rights reserved.

Rosette® Globalization Platform Copyright © 2003-2005 Basis Technology Corp. All rights reserved.

Teragram Language Identification Software Copyright © 1997-2005 Teragram Corporation. All rights reserved.

Trademarks

Endeca, the Endeca logo, Guided Navigation, MDEX Engine, Find/Analyze/Understand, Guided Summarization, Every Day Discovery, Find Analyze and Understand Information in Ways Never Before Possible, Endeca Latitude, Endeca Profind, Endeca Navigation Engine, and other Endeca product names referenced herein are registered trademarks or trademarks of Endeca Technologies, Inc. in the United States and other jurisdictions. All other product names, company names, marks, logos, and symbols are trademarks of their respective owners.

The software may be covered by one or more of the following patents: US Patent 7035864, US Patent 7062483, US Patent 7325201, US Patent 7424528, US Patent 7567957, US Patent 7617184, Australian Standard Patent 2001268095, Republic of Korea Patent 0797232, Chinese Patent for Invention CN10461159C, Hong Kong Patent HK1072114, European Patent EP1459206B1, and other patents pending.

Endeca Developer Studio Installation Guide • March 2010

Preface

The Endeca® Information Access Platform is the foundation for building applications that help people understand complex information, fostering discovery and improving daily decision-making. These applications instantly summarize data and content for users—even for unanticipated requests. The Guided Summarization™ experience leads to unexpected insights in millions of everyday decisions, increasing revenue, decreasing costs, and accelerating operations.

The Endeca Information Access Platform is powered by MDEX Engine™ technology, a new class of database designed for exploring information, not managing transactions. The MDEX Engine is supported by:

- The Information Transformation Layer that unites and enriches disparate sources of information while maintaining, augmenting, and even creating structures across the data and content.
- An adaptive application component library that enables the rapid development of information access applications that automatically adapt to changes in the data and content.
- A Web-based management suite that empowers managers to highlight the right information at the right time to end users through adaptive presentation rules and dynamic pages.

These essential capabilities are delivered as an enterprise-class platform, with the scalability, reliability, and security that leading organizations demand.

About this guide

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

This guide assumes that you have read the *Endeca Getting Started 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 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

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 Server 2008
- Windows XP

Compatibility with Endeca components

Developer Studio is compatible with the following Endeca components:

- MDEX Engine 6.1.3 (or higher)
- Platform Services 6.1.0
- Endeca Workbench 2.1.x
- Deployment Template 3.2

Required reading

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

Getting Started Guide

The *Endeca Getting Started 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 Getting Started Guide* from the Downloads section of the Endeca Developer Network (EDeN) at <http://eden.endeca.com>.



Note: The *Endeca Getting Started Guide* was called the *Endeca Quick Start Guide* in the original 6.x documentation set.

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 Knowledge Base section of the Endeca Developer Network (EDeN) at <http://eden.endeca.com>. 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 *Endeca Platform Services Migration Guide* for information about migrating your implementation from a previous version of Endeca software. You can download the Migration Guide from the Knowledge Base section of the Endeca Developer Network (EDeN) at <http://eden.endeca.com>. 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 Endeca Developer Network (EDeN) Download page.

To install Developer Studio:

1. In your local environment, locate the Endeca Developer Studio installer that you downloaded from EDeN.
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. Endeca 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\6.1.0
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\6.1.0\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\6.1.0\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 12

O

overview
 Developer Studio 9

P

Pipeline paths 14
prerequisites 10

S

system requirements 10

T

temporal properties 14
 configuring 14

U

uninstalling 17

W

Workbench 13

