## **Oracle® Endeca Server**

Installation Guide

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# Preface

Oracle® Endeca Server is a hybrid search-analytical engine that organizes complex and varied data from disparate sources. At the core of Endeca Information Discovery, the unique NoSQL-like data model and inmemory architecture of the Endeca Server create an extremely agile framework for handling complex data combinations, eliminating the need for complex up-front modeling and offering extreme performance at scale. Endeca Server also supports 35 distinct languages.

## About this guide

This guide contains installation instructions for setting up Oracle Endeca Server on Windows and Linux.

## Who should use this guide

This guide is intended for system administrators installing Oracle Endeca Server on Windows or Linux.

# **Contacting Oracle Customer Support**

Oracle Endeca Customer 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 Endeca Customer Support through Oracle's Support portal, My Oracle Support at *https://support.oracle.com*.



# Chapter 1 Before You Install

This chapter provides information you should know before starting your installation of the Oracle Endeca Server.

About the Oracle Endeca Server Hardware requirements Supported operating systems Linux utilities dependencies Disk space requirements Downloading the software

## About the Oracle Endeca Server

The Oracle Endeca Server software provides the query engine that serves as the foundation for all front-end applications utilizing it.

The software includes the Oracle Endeca Server, which is the management facility for administering the Endeca data stores. Front-end applications built on top of the Oracle Endeca Server can answer end-user queries and provide business analytics information to the front-application's users.



**Note:** The term Oracle Endeca Server is used in two related contexts — on the one hand, it is the name of the entire software package for the server. On the other hand, the Oracle Endeca Server is the management facility for administering your data stores.

The Oracle Endeca Server lets you administer your Endeca data stores. The Endeca data store is where the source data records are stored after being loaded from your ETL client. With the Oracle Endeca Server, you can:

- Create an Endeca data store, including assigning a name that will later be used to access and manage it.
- Stop and start Endeca data stores.
- View the status of any Endeca data store.
- List the jobs that are running on a specific Endeca data store.

In addition, the Oracle Endeca Server constantly monitors the status of the running Endeca data stores and will automatically restart them (for example, if one crashes).

As the query engine, the Dgraph process of the Oracle Endeca Server uses proprietary data structures and algorithms that allow it to provide real-time responses to client requests issued to the data store that is running on the server. The Dgraph process receives client requests via the application tier, queries the data files, and returns the results.

Each Endeca data store contains a set of versioned Web services for loading, configuring, and querying the data. These Web services, together with the Bulk Load Interface, provide the interface to the Oracle Endeca Server.

#### About the cluster of nodes

A cluster is composed of a set of nodes, all of which can serve query requests. Only one node is identified as the leader node; all other nodes are follower nodes. One copy of the data files is shared and used by all nodes. The Cluster Coordinator provides communication between the nodes in the cluster. It also notifies the reader nodes about index updates and updates to the configuration.

If one of the cluster nodes fails, queries continue to be processed by other nodes in the cluster. A cluster also provides increased throughput by the Oracle Endeca Server. By adding nodes to a cluster you can spread the query load across multiple Oracle Endeca Servers without the need to increase storage requirements at the same rate. Nodes can be added or removed dynamically, without having to stop the cluster.

In the development environment, you can start with a single Oracle Endeca Server that is not part of a cluster. (Without the cluster services, having a single running Oracle Endeca Server is a valid configuration for starting in the development environment.) You can then expand your single instance implementation by first building a simple single-node cluster configuration and then adding more nodes. When you move to a production environment, you can duplicate a multi-node cluster that you built in the development environment.

In this release, the cluster implementation requires that you download and install the Cluster Coordinator package. For information on configuring and running the cluster, see the chapter on clustering in the *Oracle Endeca Server Administrator's Guide*.

### Hardware requirements

The Oracle Endeca Server has the following hardware requirements.



**Note:** In this guide, the term "x64" refers to any processor compatible with the AMD64/EM64T architecture. You might need to upgrade your hardware, depending on the data you are processing. All run-time code must fit entirely in RAM. Likewise, hard disk capacity must be sufficient based on the size of your data set. Please contact your Oracle representative if you need more information on sizing your hardware.

#### Windows and Linux on x64

Minimum hardware requirements:

- x64 processor, minimum 1.8 GHz
- At least 3 GB of RAM, depending on the size of the application data set
- 80 GB hard drive, depending on the size of the application data set

Recommended hardware requirements:

- x64 3.0+ GHz processors; Intel Xeon (including Nehalem) or AMD Opteron processors are recommended
- 8 GB of RAM or more, depending on the size of the application data set
- High performance network-attached storage (for example, attached via a dedicated iSCSI or fibre channel network), or high performance locally-attached RAID storage (for example, a RAID 6 or RAID 0+1 array

with battery-backed write caching, operating on 72GB or 146 GB spindles at 10k or 15k RPM spindle speed)

· Gigabit Ethernet

#### Hardware requirements for running a cluster of nodes

These requirements exist:

- Shared file system. All nodes in the cluster must have access to a shared file system on which the data files for the data store are stored.
- Load balancer. In most production deployments, it is desirable to configure a load balancer between your front-end application and a cluster of the Oracle Endeca Server nodes. Include host names and ports of all nodes into the load balancer configuration. For more information, see the cluster section of the Oracle Endeca Server Administrator's Guide.

### Supported operating systems

The Oracle Endeca Server supports the following 64-bit operating systems running on servers with x64 capabilities:

Operating System	Description
Oracle Linux 5	Only the Red Hat Compatible Kernel is supported.
Linux RHEL 5	<ul> <li>Red Hat Enterprise Linux Server (version 5 for x64) running on x64 processors.</li> <li>Red Hat Enterprise Linux Advanced Platform (version 5 for x64) running on x64 processors.</li> <li>For best performance on Red Hat Linux version 5 (Server and Advanced), Endeca recommends the latest version of RHEL 5.</li> </ul>
Windows 2008	Windows Server 2008 R2 Enterprise running on x64 processors.

#### Notes

Windows 7 is not supported for production deployment, but operates sufficiently to enable training and smallscale development work.

Windows XP is not supported.

If you intend to install the Oracle Endeca Server as part of a cluster of nodes, all nodes must be running on the same operating system — you cannot create a cluster in which some nodes are running on Windows while other nodes are running on Linux.

### Linux utilities dependencies

The Oracle Endeca Server installer requires several Linux utilities.

The following Linux utilities must be present in the /bin directory:

basename cat chgrp chown date dd df mkdir more rm sed tar true

The following Linux utilities must be present in the /usr/bin directory:

awk cksum cut dirname expr gzip head id perl printf tail tr wc which

If these utilities are not in the specified locations, the installation fails with a message similar to the following: Required dependency is not executable: /bin/df. Aborting.

### **Disk space requirements**

You should ensure that adequate disk space is available before installing the Oracle Endeca Server.

On Windows, the installation process requires a minimum of 400 MB in the system partition and 200 MB in the target partition. To avoid an "out of drive space" error during the installation process, you should allow the minimum of memory required on the system and target partitions.

The Windows installation process unpacks its .MSI installation file, and other temporary and log files, to a location on the system drive (typically the user's %TEMP% folder). These files add another 400MB during the installation. When the process completes the installation, it deletes the temporary files and frees the 400 MB space it consumed.

On Linux, the Oracle Endeca Server unpacks to approximately 430 MB. Because multiple versions may eventually be stored, a destination in a large disk partition is recommended.

## Downloading the software

The Oracle Endeca Server software modules are downloaded from the Oracle Software Delivery Cloud.

The Oracle Endeca Server download includes the Cluster Coordinator package, used to run a cluster of Endeca servers.

To download the Oracle Endeca Server software:

- 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 the platform you are installing on.
  - (c) Click Go.

The list of media packs for the selected product and platform is displayed.

For the Windows platform, the media pack is **Oracle Endeca Server (7.4) Media Pack v1 for Microsoft Windows x64 (64-bit)**.

For the Linux platform, the media pack is **Oracle Endeca Server (7.4) Media Pack v1 for Linux x86-64**.

4. In the media pack list, click the name of the media pack.

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

5. For the Oracle Endeca Server and Cluster Coordinator package, for Windows, download Oracle Endeca Server (7.4) for Microsoft Windows x64 (64-bit).

The downloaded file, ES74\_Win.zip, contains:

ES_7.4.exe	Oracle Endeca Server installer.
ES_7.4_cluster_coordinator_win.tgz	Cluster coordinator package. Used when running a multiple Endeca Server nodes in a clustered environment.
ES_7.4_doc.zip	Oracle Endeca Server documentation.
ES_7.4_readme.txt	Oracle Endeca Server release notes.

For Linux, download **Oracle Endeca Server (7.4) for Linux x86-64**. The downloaded file, ES74\_Linux.zip, contains:

ES_7.4.sh	Oracle Endeca Server installer
ES_7.4_cluster_coordinator_linux.tgz	Cluster coordinator package. Used when running a multiple Endeca Server nodes in a clustered environment.

ES_7.4_doc.zip	Oracle Endeca Server documentation.
ES_7.4_readme.txt	Oracle Endeca Server release notes.

**Note:** The Cluster Coordinator package is required if you would like to run a number of Endeca Server nodes in a clustered environment. You install the Cluster Coordinator package on one server you will include in a cluster as a leader node. For information on using a cluster, see the *Oracle Endeca Server Administrator's Guide*.



# Chapter 2 Installing Oracle Endeca Server

This chapter contains instructions for installing the Oracle Endeca Server.

Installing Oracle Endeca Server on Windows Installing silently on Windows Installing Oracle Endeca Server on Linux Installing silently on Linux Installing the Cluster Coordinator package

# **Installing Oracle Endeca Server on Windows**

This topic describes how to install Oracle Endeca Server on a Windows client machine.

Oracle Endeca Server is installed on Windows as a machine-wide installation. This type of installation requires administrator permissions and is used because it is intended for a production environment.

This procedure assumes that you have downloaded the Oracle Endeca Server installer for Windows.

To install Oracle Endeca Server on a Windows client:

- Double-click the installer file to start the wizard. The wizard verifies the contents of the installation package.
- 2. Click **Next** to begin the installation process.

The Important Information screen appears with copyright and legal information.

- 3. Read the information on this screen, and click **Next**.
- 4. In the **Destination Folder** screen, either accept the default installation folder or select another installation location. Then click **Next**.

You cannot install the Oracle Endeca Server into a folder that contains content.

The wizard displays both the required and available disk space for the target directory chosen. The Oracle Endeca Server requires approximately 200 MB of disk space. The installer requires approximately 400 MB of space on the system drive for temporary files. These temporary files are cleared after the installation process completes.

- 5. In the **Completing the Setup Wizard** screen, click **Next**. The wizard begins to install the Oracle Endeca Server files.
- 6. When the wizard confirms that you have successfully completed the installation, a checkbox lets you choose whether to start the Oracle Endeca Server now or later:
  - To start the Oracle Endeca Server immediately after installation, leave the box checked.

- To start the Oracle Endeca Server later, uncheck the box.
- 7. Click Finish.
- 8. After installation is complete, enable secure mode (SSL) on Oracle Endeca Server by following the procedure in the Oracle Endeca Server Administrator's Guide.

If you chose to start the Oracle Endeca Server now, the server is started and a command window opens for standard output.

The installation also creates an **Oracle Endeca Server 7.4.0** entry in the Start Menu with these shortcut options:

- Start Oracle Endeca Server
- Stop Oracle Endeca Server
- Uninstall Oracle Endeca Server 7.4.0

### Installing silently on Windows

Running the silent installer on Windows has different effects depending on whether or not the user has administrator permissions.

If the silent installer is run with administrator permissions, it creates a per-machine installation. Otherwise, it creates a per-user installation. Variables on the command line can be used to override this default behavior.

To install silently on Windows:

- 1. From a command prompt, navigate to the directory where you downloaded the installer.
- 2. Run the silent installer with a command (on a single line), similar to this example:

start /wait ES\_7.4.exe /s TARGETDIR=C:\Oracle\Endeca\Server\7.4.0

You can replace the TARGETDIR path location in the example with the location to which you want to install. However, if you set the install location to a non-empty directory or to a drive that does not exist, the silent installation will fail with a non-zero status code.

Additionally, an administrator can override the default behavior and create a per-user installation by setting ALLUSERS=FALSE.

3. After installation is complete, enable secure mode (SSL) on Oracle Endeca Server by following the procedure in the Oracle Endeca Server Administrator's Guide.

The installation also creates an **Oracle Endeca Server 7.4.0** entry in the Start Menu with these shortcut options:

- Start Oracle Endeca Server
- Stop Oracle Endeca Server
- Uninstall Oracle Endeca Server 7.4.0

When running the silent installer on Windows, you can turn on logging. This can be useful, for example, if you need to debug a failed silent installation. To turn on logging during a silent installation on Windows, add /1=<path>. An absolute path is required.

## Installing Oracle Endeca Server on Linux

The Oracle Endeca Server is distributed as a self-extracting tar file and install script. It can be installed at any location.



**Note:** The Oracle Endeca Server unpacks to approximately 200 MB. Because multiple versions may eventually be stored, a destination in a large disk partition is recommended.

To install the Oracle Endeca Server:

- 1. Determine where you will install the Oracle Endeca Server. Verify that the target directory on which you plan to install has enough available disk space, and has write permissions (is not read-only). For example, in this procedure we assume that the target directory is /localdisk and that you have write permissions for it.
- 2. Run the Endeca installation script with a command similar to this example:

./ES\_7.4.sh --target /localdisk

3. The copyright notice displays first. Review the copyright notice and scroll to the end of it. When you reach the end of the notice, the installation begins. The installer displays a message that it is about to extract files in the specified directory. The installer also checks that the directory has enough available disk space, and that it can write to this directory. If these conditions are met, the installer proceeds with the installation and completes it. If they are not met, the installer issues an error and discontinues the installation.

The installation is finished when you see this confirmation message:

Installation complete!

4. After installation is complete, enable secure mode (SSL) on Oracle Endeca Server by following the procedure in the *Oracle Endeca Server Administrator's Guide*.

As a result of the installation, the Oracle Endeca Server is installed in:

Oracle/Endeca/Server/7.4.0

To start up the Oracle Endeca Server, run the start.sh script in the endeca-server directory.

## Installing silently on Linux

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

The silent installer is not interactive.

To install silently on Linux:

- 1. From a command prompt, navigate to the directory where you downloaded the installer.
- 2. Issue a command (on a single line) similar to this example:

./ES\_7.4.sh --silent --target /localdisk

Note that --target must be the last parameter specified.

The installation is finished when you see this confirmation message:

Installation complete!

3. After installation is complete, enable secure mode (SSL) on Oracle Endeca Server by following the procedure in the *Oracle Endeca Server Administrator's Guide*.

To start up the Oracle Endeca Server, run the start.sh script in the endeca-server directory.

## Installing the Cluster Coordinator package

To run in a cluster, the Cluster Coordinator package must be installed and the Cluster Coordinator service must be running on the one cluster node that is designated to be the leader node.

It is assumed that you have downloaded the Cluster Coordinator package and also have installed the Oracle Endeca Server on the node.

You install the Cluster Coordinator by unzipping its package into the

*localdisk*:\Oracle\Endeca\ClusterCoordinator\<*version*> directory. If you installed the Oracle Endeca Server, this directory will be parallel to the directory in which the server is installed.

To install the Cluster Coordinator on the leader node:

1. Download the following packages to your *localdisk*:\Oracle\Endeca directory:

Windows	ES_version_cluster_coordinator_win.tgz
Linux	ES_version_cluster_coordinator_linux.tgz

where <version> is the current version of the Oracle Endeca Server software package.

2. Unzip the Cluster Coordinator package, using the command similar to the following example (on Linux):

cd /localdisk tar xzf /Oracle/Endeca/ES\_version\_cluster\_coordinator\_linux.tgz

The Cluster Coordinator package is installed in:

Oracle/Endeca/ClusterCoordinator/<version>

on Linux.

For Windows, the path is:

Oracle\Endeca\ClusterCoordinator\<version>

Once the Cluster Coordinator package is installed on the leader node, its service can be started. For information on starting the cluster, see the *Oracle Endeca Server Administrator's Guide*.



This chapter contains some post-installation topics, including how to uninstall Oracle Endeca Server.

Package contents and directory structure Testing your installation List of Web services and their versions Uninstalling the Oracle Endeca Server

## Package contents and directory structure

The Oracle Endeca Server installation creates the following directory structure.

The default root directory for the Oracle Endeca Server is:

- For Windows: C:\Oracle\Endeca\Server\7.4.0
- For Linux: the directory specified with the installer's --target option.

The root directory contains files and software modules for all of the Oracle Endeca Server components:

Directory	Contents
root directory	The release notes (README.txt), the Oracle Endeca Server Licensing Guide, and the version.txt file.
/apis	The directories for the Oracle Endeca Server API Reference (the /doc directory), the Java client examples for sending queries to the Oracle Endeca Server (the /examples directory), the WSDL and XSD documents for each Web service packaged with the Oracle Endeca Server (the /web-services directory), and the JAR file representing the packaged Bulk Ingest interface.
/endeca-cmd	The JAR for the endeca-cmd command-line interface, as well as the command script that calls the Oracle Endeca Server commands. Also, the lib directory contains utilities used for SSL support.
/endeca-server	The start and stop scripts for the Oracle Endeca Server. Also contains, the Endeca data store's Dgraph process, and the Jetty Java application server.
logs	The logs directory for the Oracle Endeca Server and the Endeca data stores.

Directory	Contents
state	The directory for storing internal information about the data store configuration. The contents of this directory is used by the Oracle Endeca Server. This directory is not intended to be used by the data store administrators.
data	The default directory for storing the data files for the data stores. This directory is not intended to be used by the data store administrators.
/shared	The JRE (Java Runtime Environment) used by the Oracle Endeca Server.

## **Testing your installation**

To verify the installation, you can create an instance of an Endeca data store.



**Note:** The instructions in this topic are based on Windows. If you installed on Linux, the steps will be similar, though you will need to substitute executables and paths.

To test that the installation succeeded, perform the following steps:

- 1. To start the Endeca Server on Windows, use the **Oracle Endeca Server 7.4.0>Start Oracle Endeca Server** option in the Start Menu.
- 2. Open a command prompt and navigate to the Oracle\Endeca\Server\7.4.0\endeca-cmd folder.
- 3. Use the endeca-cmd create-ds command to create and start an Endeca data store.

endeca-cmd create-ds adventureworks

The command creates an initial index for the Endeca data store and starts it.

4. Use the endeca-cmd status-ds command to verify that the Endeca data store is running:

endeca-cmd status-ds adventureworks

The Endeca data store will be fully running when you see this output in the command prompt window:

Current State: Started

```
Data Files: C:\Oracle\Endeca\Server\7.4.0\endeca-server\data\adventureworks
WS Port: 7771
Bulk Load Port: 7772
Startup Timeout (s): 60
Shutdown Timeout (s): 60
```

For detailed information on the Oracle Endeca Server and its commands, see the Oracle Endeca Server Administrator's Guide.

## List of Web services and their versions

Once you install the Oracle Endeca Server and create a data store in it, you can use the packaged Web services with the specified versions for each of them, to send requests.

The WSDL and XSD documents for the following Web services are installed in the Oracle\Endeca\Server\7.4.0\apis\web-services directory of your installation:

- Data Ingest Web Service 1.0, ingest (documented in the Oracle Endeca Server Data Loading Guide)
- Configuration Web Service 1.0, config (documented in the Oracle Endeca Server Developer's Guide)
- Conversation Web Service 1.0, conversation (documented in the Oracle Endeca Server Developer's Guide)
- Transaction Web Service 1.1, transaction (documented in the Oracle Endeca Server Developer's Guide)
- Administration Web Service 1.0, admin (documented in the Oracle Endeca Server Administrator's Guide)

In addition to these Web services, additional Web services are available with the Oracle Endeca Server:

- The LQL Parser Web Service 2.0, lql\_parser, used by the Conversation Web Service to parse Endeca Query Language queries and filters.
- The Entity Configuration Web Service 1.0, sconfig, used to create and manage views.
- The Control Web Service 1.0, control, used by the Oracle Endeca Server commands.



**Note:** Each Web service is versioned with the major and minor version numbers listed in its WSDL document. If you are planning to use Web service calls directly or use client-side code created with stubs generated from a web service, ensure that you use a supported version of the Web service. For detailed information on Web service versions, see a section in the *Oracle Endeca Server Developer's Guide*.

The Bulk Load Interface is also installed in the Oracle\Endeca\Server\7.4.0\apis directory of your installation. Together with the Data Ingest Web Service, the Bulk Load Interface loads the records into the Oracle Endeca Server. For more information on this interface, see the Oracle Endeca Server Data Loading Guide.

## **Uninstalling the Oracle Endeca Server**

This section contains the procedures for uninstalling the Oracle Endeca Server.

#### Uninstalling the Oracle Endeca Server on Windows

Follow these steps to uninstall the Oracle Endeca Server from your Windows machine.

Before you begin the uninstall process, back up files that you want to retain from the Oracle Endeca Server directory.

You also must:

- Stop all Endeca data stores.
- Stop the Oracle Endeca Server process.

To uninstall the Oracle Endeca Server from your Windows machine:

- 1. Open the All Programs list in the Start Menu.
- 2. From the programs list, select Oracle Endeca Server 7.4.0>Uninstall Oracle Endeca Server 7.4.0.
- 3. In the uninstall wizard, select the **Uninstall** radio button and then click **Next**.
- 4. In the following dialog, click **Next** to begin the uninstall procedure.
- 5. When the wizard confirms that you have successfully completed the uninstall procedure, click **Finish** to exit the wizard.

#### **Uninstalling the Oracle Endeca Server on Linux**

Follow these steps to uninstall the Oracle Endeca Server from your Linux machine.

Before you begin the uninstall process, back up files that you want to retain from the Oracle Endeca Server directory.

Make sure that you stop all Oracle Endeca Server processes, including the Endeca data stores, before uninstalling the Oracle Endeca Server software.

To uninstall the Oracle Endeca Server from your Linux machine:

- 1. Change to the parent directory of the Oracle Endeca Server install directory. The default parent directory is Oracle/Endeca.
- 2. Issue an rm command as in this example:

rm -rf Server

This command removes the Oracle Endeca Server installation.

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