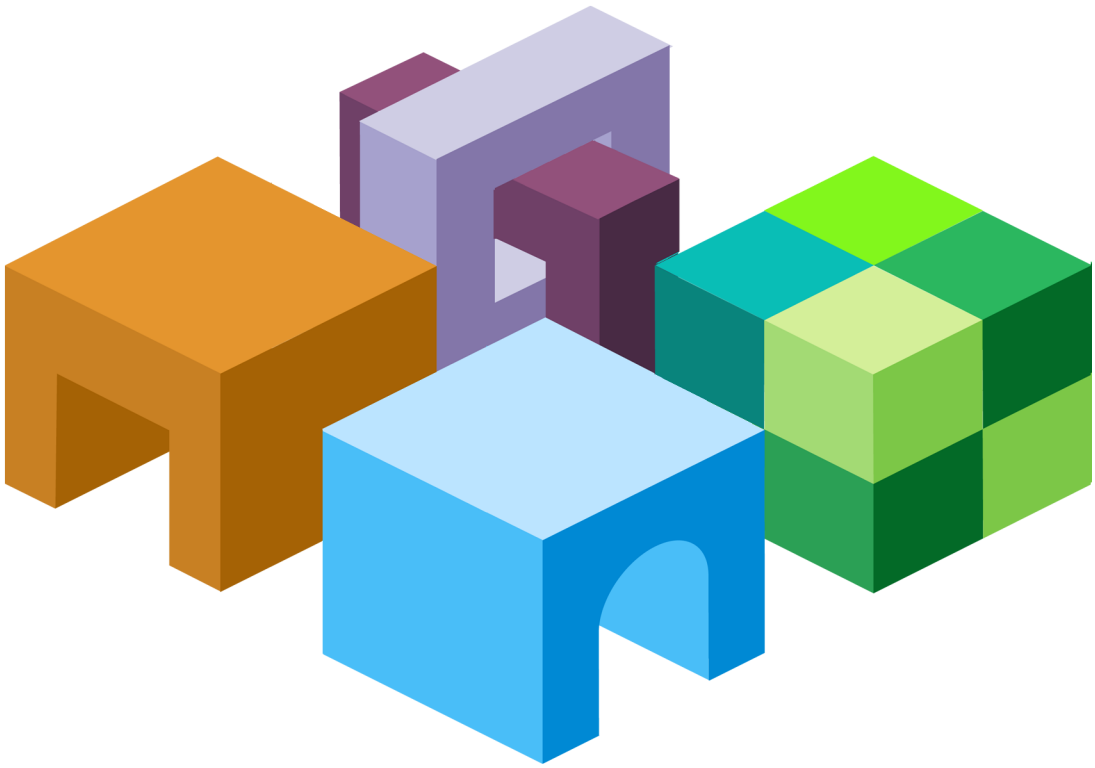

ORACLE® HYPERION SMART SEARCH COMMAND LINE UTILITY

RELEASE 11.1.2

ADMINISTRATOR'S GUIDE

ORACLE®
ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Smart Search Command Line Utility Administrator's Guide, 11.1.2

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1 Configuring Smart Search Server

In This Chapter

Oracle Hyperion Smart Search Command Line Utility enables the Smart Search Server to work with a search engine to access Essbase metadata. Supported search engines are Google OneBox, Oracle Secure Enterprise Search (SES) Release 10.1.8, and Oracle SES Release 10.1.8.2.

Configuring Smart Search Server for Use with Google OneBox

Configuration involves two steps:

1. Registering the server
2. Configuring the server

➤ To register and configure Smart Search Server for use with Google OneBox:

1 **Open Smart Search Command Line Utility.**

2 **In the Smart Search command prompt window, enter:**

```
register -p GSA -s server_name:port
```

where the server name and port are in the form `http(s)://server101:16080`

3 **In the login window displayed, enter your Oracle's Hyperion® Shared Services user name and password and click Login.**

4 **In the command window, enter:**

```
configure -p GSA -s server_name:port -f configfile.xml
```

where the server name and port are as in step 2 on page 5, and the file name refers to an XML configuration file similar to the sample included with the product. A sample configuration file is listed in Appendix A, "Sample Configuration and Indexing Files."

5 **Close the command prompt window.**

Note: Optionally, you can enter commands (for example, `register` or `configure`) without including the parameters. In this case, Smart Search Command Line Utility prompts you for parameter information.

Configuring Smart Search Server for Use with Oracle SES 10.1.8.2 or 10.1.8.4

Follow these steps to configure Smart Search Server for use with Oracle SES 10.1.8.2:

1. Configure Register Provider
2. Configure embedded search and the cluster tree
3. Configure Oracle SES for Smart Search Server

Configuring Register Provider

Note: Register Provider is supported only for Oracle SES release 10.1.8.2 and later.

➤ To configure Register Provider:

1 **Copy** `SmartSearchCrawler.jar` **from** *`EPM_ORACLE_HOME`*`\products\Essbase\SmartSearch\hysl\CrawlerPlugin` **to a subdirectory of** *`SES_HOME`*`\search\lib\`.

Oracle recommends creating a subdirectory for this file; for example, *`SES_HOME`*`\search\lib\plugins\smartsearch\`.

2 **Optional: If using the dummy identity plug-in shipped with Smart Search, copy** `HSSIdentityPlugin.jar` **from** *`EPM_ORACLE_HOME`*`\products\Essbase\SmartSearch\hysl\IdentityPlugin` **to** *`SES_HOME`*`\search\lib\identity\`.

3 **In a browser, enter:** `http://`*`SmartSearchProvider`*`:`*`port`*`/EssbaseSearch/RegisterProvider` **(example:** `http://localhost:16080/ EssbaseSearch/RegisterProvider`**)**

4 **In the login window displayed, enter your Shared Services user name and password and click Login.**

5 **Enter configuration information into the appropriate fields:**

- **Server Configuration**: Enter SES URL, administrator user name, and password.
- **Source Type Configuration**: Enter Smart Search description, optionally including the jar file name from step 1.
- **Search Source Configuration**: Enter the Smart Search Server URL in the form `http://`*`hostname`*`:`*`port_number`* and the Shared Services user name and password.
- **Schedule configuration**: Enter the name of the crawler schedule.
- **Optional: Dummy Identity Plug-In Configuration**: If using the dummy identity plug-in, select the **Configure Dummy Identity Plugin** and **Activate Plugin** check boxes and enter the JAR file name from step 2.

6 Click **Register**.

➤ To add Essbase source type:

1 On the **Global Settings** tab, select **Source Types**.

2 Click **Create**, and enter required information, including the following:

- **Plug-in Manager Java Class Name**: Enter the Smart Search Java class name; for example `com.hyperion.search.SmartSearchCrawlerPluginManager`.
- **Plug-in Jar File Name**: Enter the Smart Search JAR file name and location relative to the `search\lib\plugins\` directory; for example, `smartsearch\SmartSearchCrawler.jar`.

3 Click **Next**, and then **Finish**.

4 On the **Home** tab, select **Sources**, then the source type that you just created, and then click **Create**.

5 Enter the source name, the URL of the Smart Search Server in the form `http://hostname:port`, and the Shared Services user name and password, and click **Create**.

6 **Optional:** On the **Home** tab, select **Sources**, and then **Edit**.

7 **Optional:** In the Edit User-Defined Sources screen, edit the following parameters, if necessary, to increase system resources.

- **Number of Crawler Threads:** Increase if you plan to index a large number of applications.
- **Crawler Timeout Threshold (seconds):** Increase if indexing an extremely large outline.
- **Maximum Document Size (MB):** Increase if indexing an extremely large outline.

Configuring Embedded Search and Cluster Tree

➤ To configure embedded search:

1 Navigate to **Global Settings**, and select **Configure Search Result List**.

2 Select **Use Advanced Configuration**.

3 Ensure that the **Included** list contains the following attributes:

- ESSBASE_URL
- Url
- eqsnippet
- equserquery

4 Using a text editor, create a backup copy of the style sheet.

5 From the directory to which Smart Search was installed, in a text editor open `hysl\ses_globalconfig.xsl`.

6 Replace all instances of `http://localhost:16080` with the URL of the Smart Search Server, including port number.

7 Paste the modified contents of `hysl\ses_globalconfig.xsl` into the style sheet text box, and click **Apply**.

➤ To configure the cluster tree:

1 Navigate to **Global Settings**, and select **Clustering Configuration**.

2 If necessary for your configuration, modify the **Clustering parameter** and the **Minimum number of documents per node**.

For information, see the *Oracle Secure Enterprise Search Administrator's Guide*.

3 Create a cluster tree of type metadata and set the parameters:

- Set cluster tree name to Essbase servers.
- Select "ESSBASE_URL" attribute.
- Set Hierarchy delimeter to any character.

4 Click **Apply**.

Configuring Oracle SES for Use with Smart Search Server

➤ To configure a Smart Search Server for Oracle SES:

1 In the Oracle SES administration interface, select the **Search** tab, and then **Suggested Content**.

2 Click **Create**, and enter information for the new provider:

- **Name**: Provider name.
- **Query Pattern**: Java regular expression for the trigger keyword. For example, if "essbase" is the keyword, the query pattern regular expression (regex) will be `essbase\s(.+)`.
- **Provider URL**: Location of the Smart Search Server. For example, `http://hostname:port_number/EssbaseSearch/Search?query=$ora:q`
- **Enable**: Select this check box.
- **XSLT Spreadsheet**: A sample can be found in the `release\hysl\ses.xsl` subdirectory of the Smart Search Command Line Utility installation directory.

3 On the same page, configure the security settings as follows:

- **Entity Name and Password**: Enter your Shared Services user name and password.
- **Format**: Leave blank.

4 Click **Create**.

Indexing Metadata

After Smart Search is configured for your search provider, you must index the metadata for your data source.

➤ To index metadata for Smart Search Server:

1 **Open Smart Search Command Line Utility.**

2 **To configure applications and databases for this provider, enter the following command:**

```
index -s server_name:port –f index_file.xml
```

where `index_file.xml` is an XML file containing the Oracle Essbase server, application, and database list to be indexed. A sample index file listing is provided in Appendix A, "Sample Configuration and Indexing Files."

Note: Optionally, you can enter commands (for example, `index`) without including the parameters. In this case, Oracle Hyperion Smart Search Command Line Utility prompts you for parameter information.

Starting Smart Search Server

Initially, to start Smart Search Server, you must do the following:

1. Modify the start up script templates for your environment.
2. Start Smart Search Server, then shut it down.
3. Create a `boot.properties` file.
4. Start Smart Search Server again.

➤ To modify start up scripts:

1 **Under the directory where you copied the extracted Smart Search files, open `\SmartSearchHome\setCustomParamsSearchServices.bat` in a text editor.**

2 **Enter values for the following environment variables:**

- `HYPERION_HOME`
- `EPM_ORACLE_INSTANCE`
- `SMARTSEARCH_HOME`

3 **Save this file.**

4 **In a text editor, open `\SmartSearchHome\StartSmartSearchProvider.bat`.**

5 **Change the line `d:` to indicate the directory to which Shared Services was installed.**

6 **Change the next line to reference the `deploymentScripts` directory; for example, `D:\Oracle\Middleware\user_projects\epmsystem1\bin\deploymentScripts`.**

7 **Change the line `cd D:\Oracle\Middleware\user_projects\domains\EPMSystem\bin` to reference the location of the `EPMSystem\bin` directory on your server.**

8 **Save this file.**

9 **Copy `setCustomParamsSearchServices.bat` to the `deploymentScripts` directory; for example, `D:\Oracle\Middleware\user_projects\epmsystem1\bin\deploymentScripts`.**

➤ To start Smart Search Server, launch `StartSmartSearchProvider.bat`.

➤ To create a `boot.properties` file:

1 **In the WebLogic domain under which Smart Search is deployed, create a `\security` subdirectory. For example; `D:\Oracle\Middleware\user_projects\epmsystem1\domains\EPMSystem\servers\SmartSearch\security`.**

2 **In a text editor, enter the following:**

```
username=WebLogic domain user name
password=password for this user name
```

3 **Name this file `boot.properties` and save it to the `\security` directory created in step 1.**

Note: The Smart Search deployment folder is created when

2 Using Smart Search

Using Smart Search is similar to using Google. Users receive a URL for the front-end search page and keywords to access the Smart Search provider.

➤ To use Smart Search:

1 **Enter the URL for the Smart Search front end into your browser.**

If you will be using Smart Search frequently, bookmark the page.

2 **Enter the trigger keyword (for example, "essbase"), followed by search words, and click Search.**

Note: If no keyword is entered in the text box, no data grids are included in Google search results.

3 **Do one of the following:**

- If using Smart Search with Google OneBox, enter an Oracle Essbase or Shared Services user name and password, and click **OK**. This will only be necessary for your first query each session.
- If using Smart Search with Oracle SES, select the **Login** link to launch a Login page for Oracle Secure Enterprise Search. Enter a Oracle's Hyperion® Shared Services user name and password, and click **Login**.

4 **Review your search results and click any link for more information.**

- Search results with data grids display a link and up to 12 rows of data in the grid. Clicking the link displays the results in a spreadsheet. If Oracle Hyperion Smart View for Office, Fusion Edition is installed, the spreadsheet is opened with Smart View, and you can perform further ad-hoc analysis on the data. Otherwise, the results display in an Excel spreadsheet, and ad-hoc analysis using Oracle Hyperion Smart View for Office, Fusion Edition is not available.
- If keywords are present in an outline, the results display the portion of the outline containing the search keywords, and clicking the link launches a data grid in Excel.
- If keywords are present in a report script or calculation script, a summary of the script content is displayed. Clicking the link launches a browser displaying the report script with keywords highlighted. Clicking the **Execute Script** link in this window executes the report or calculation script and displays results in a new browser window.
- If keywords are present in a linked reporting object (LRO), summary results are displayed. Clicking the link launches a browser window displaying all of the LROs in the application. URL links in an LRO can be clicked and launched.

- Clicking a **Show graph** link launches a browser window containing a graph of the outline results.

➤ To create a query containing a conditional expression:

1. Enter the expression into the search box; for example, `essbase Sales > 222`.
2. Click **Help me construct Query**.
3. In the page that opens, use the fields and buttons provided to construct your query:
   - Construct conditions using the **Filter Expressions** text and drop-down boxes.
   - Click **Add Expression** to add the current Filter Expression to the query.
   - Click **And** or **Or** to connect the expressions in the query logically.
4. When the query is complete, click **Preview** or **Search** to execute the search.

A Sample Configuration and Indexing Files

In This Appendix

Sample Configuration File

```
<configuration>
<GSA_ADDRESS>http://blrd9249.symphony.hyperion.com:7777</GSA_ADDRESS>
<GSA_FRONTEND>fourfghjfghj</GSA_FRONTEND>
<GSA_XML_FEED_PORT>sdf</GSA_XML_FEED_PORT>
<SECURITY_CONFIGURATION>http://blrd9249.symphony.hyperion.com:28080/interop/framework/
getCSSConfigFile</SECURITY_CONFIGURATION>
<SmartViewProvider>http://blrd9249.symphony.hyperion.com:16080/EssbaseSearch/Search?
query=$ora:q</SmartViewProvider>
</configuration>
```

XML Schema for the Sample Configuration File

```
<?xml version="1.0" encoding="UTF-8">
  <xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema" elementFormDefault="qualified">

  <xs:element name="configuration">
    <xs:complexType>
    <xs:sequence>
    <xs:element ref="GSA_ADDRESS"/>
    <xs:element ref="GSA_FRONTEND"/>
    <xs:element ref="GSA_XML_FEED_PORT"/>
    <xs:element ref="SECURITY_CONFIGURATION"/>
    <xs:element ref="SmartViewProvider"/>
   </xs:sequence>
  </xs:complexType>
 </xs:element>
<xs:element name="GSA_ADDRESS" type="xs:anyURI"/>
<xs:element name="GSA_FRONTEND" type="xs:NCName"/>
<xs:element name="GSA_XML_FEED_PORT" type="xs:NCName"/>
<xs:element name="SECURITY_CONFIGURATION" type="xs:anyURI"/>
<xs:element name="SmartViewProvider" type="xs:anyURI"/>
</xs:schema>
```

Sample Indexing File

```
<?xml version='1.0' encoding='UTF-8'?>
<DataSourceListRequest>
<server name =”blrd4999”>
<application name=”Sample”>
<database name=”Basic”>
<outline name=”Outline”/>
<reportscript name=”Asym”/>
<reportscript name=”Attr”/>
<reportscript name=”Bottom”/>
<reportscript name=”Link”/>
<reportscript name=”Orderby”/>
<reportscript name=”Restrict”/>
<reportscript name=”Top”/>
</database>
<database name=”Interntl”>
<outline name=”Outline”/>
</database>
<database name=”Xchgrate”>
<outline name=”Outline”/>
</database>
</application>
</server>
</DataSourceListRequest>
```