Oracle® Endeca Information Discovery

Getting Started Guide

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ORACLE

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Preface

Oracle® Endeca Information Discovery Studio is an enterprise data discovery platform for advanced, yet intuitive, exploration and analysis of complex and varied data.

Information is loaded from disparate source systems and stored in a faceted data model that dynamically supports changing data. This integrated and enriched data is made available for search, discovery, and analysis via interactive and configurable applications. Oracle Information Discovery Studio includes a Provisioning Service that allows you to upload data directly from spreadsheet files.

Oracle Endeca Information Discovery Studio enables an iterative “model-as-you-go” approach that simultaneously frees IT from the burdens of traditional data modeling and supports the broad exploration and analysis needs of business users.

About this guide

This guide provides instructions for installing Oracle Endeca Information Discovery on a single instance of WebLogic Server. After you complete the installation, you can use Integrator to load sample data into Endeca Server. You can then use that sample data to provision a sample application, which you explore using Studio.

Contacting Oracle Customer Support

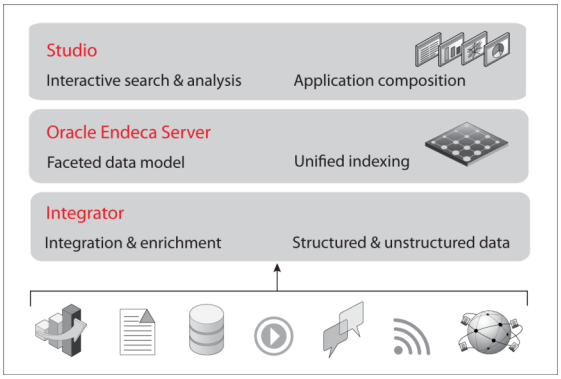
Oracle Customer Support provides registered users with important information regarding Oracle software, implementation questions, product and solution help, as well as overall news and updates from Oracle.

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

Chapter 1

Overview of Oracle Endeca Information Discovery

Oracle Endeca Information Discovery is a data discovery platform that guides people to better decisions based on diverse and changing data. It leverages the Endeca Server, a hybrid search-analytical database that gives IT a centralized platform to rapidly deploy interactive analytic applications and keep pace with changing business requirements while maintaining information governance.



Oracle Endeca Information Discovery consists of the following modules:

- Rapid composition and configuration of applications, views, and dashboards through **Studio**.
- Search, Guided Navigation™, and analytics capabilities powered by the **Oracle Endeca Server**.
- Comprehensive data integration options, featuring the **Integrator** enterprise ETL solution and the **Integrator Acquisition System**.

  Integrator provides connectors for standard structured and unstructured data sources, a comprehensive data enrichment library, and direct connectors to the Oracle Endeca Server.

Note: Oracle Endeca Server follows a different versioning scheme than Integrator and Studio. Version 3.0 of Oracle Endeca Information Discovery Studio and Integrator work with version 7.5.x of Oracle Endeca Server.

Chapter 2

Installing Oracle Endeca Information Discovery

These installation instructions create a development instance of the full Oracle Endeca Information Discovery product (Endeca Server, Integrator, Studio, and the Provisioning Service) on a single WebLogic Server.

About these installation instructions

System requirements

Downloading the required installation packages

Installing the Sun Java JDK

Installing WebLogic Server and ADF Runtime

Installing Oracle Endeca Server

Installing Integrator

Installing Studio

Installing the Provisioning Service

About these installation instructions

These instructions take you through a complete process of installing Oracle Endeca Information Discovery into separate domains on a single WebLogic Server.

This all-in-one installation process:

- Assumes a Windows environment
- Is for a development environment only, designed to be used for development, testing, or training
- Does not use SSL
- Uses default configurations for paths and directories

The process includes:

1. Downloading WebLogic Server, ADF (Application Development Framework) Runtime, and the Sun Java 6 JDK
2. Downloading the Oracle Endeca Information Discovery installation packages
3. Installing the JDK
4. Installing WebLogic Server and ADF
5. Installing Oracle Endeca Server
6. Installing Integrator Designer

7. Installing Studio
8. Installing the Provisioning Service

System requirements

Here are the overall system requirements for installing all of Oracle Endeca Information Discovery, including WebLogic Server, on a single Windows machine.

Requirement	Details
Hardware	Minimum hardware requirements: • x64 processor, minimum 1.8 GHz • At least 2 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; we recommend Intel Xeon (including Nehalem) or AMD Opteron processors • 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 **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.
Operating system	Windows Server 2008 R2 Enterprise running on x64 processors. Because this is a development environment, you can also install on Windows 7. For a production environment, Windows 7 would not be supported. For improved performance, we recommend turning off hyper-threading.

Requirement	Details
Disk space	WebLogic and Oracle Endeca Server have the following disk sizes after installation: • Oracle WebLogic Server: 425 MB • Oracle Application Development Runtime: 1024 MB • Oracle Endeca Server: 475 MB The total disk size of the entire installation is approximately 1.9 GB. Each installation program uses a temporary directory into which they extract the files necessary to install the software on the target system. During the installation process, your temporary directory must contain sufficient space to accommodate these files. As a rule of thumb, the files in the temporary directory require approximately 2.5 times the space that is ultimately required for each installation. By default, the installation programs use the directory referenced by the TMP system variable.
Browser (for Studio)	• Firefox ESR on Windows • Internet Explorer 8 (with compatibility mode disabled) on Windows • Internet Explorer 9 on Windows Firefox is recommended. **Important:** Running Internet Explorer 8 in compatibility mode is not supported.
Browser plugin (for Studio)	Adobe Flash 10.0 or greater. We recommend using the most recent version of Flash supported by the browser.

Downloading the required installation packages

Before you can start the installation, you need to download the required installation packages.

Downloading the installation packages for WebLogic Server, ADF Runtime, and the Sun JDK

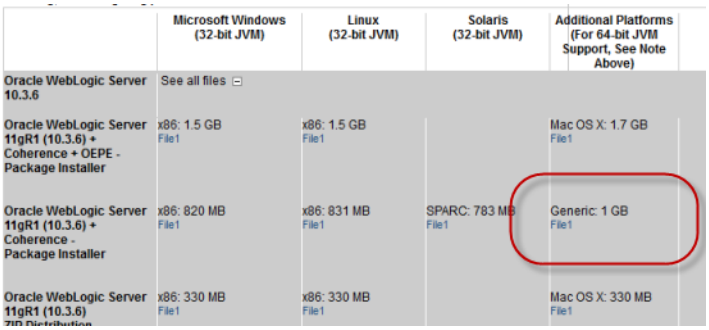
Downloading the Oracle Endeca Information Discovery installation packages

Downloading the installation packages for WebLogic Server, ADF Runtime, and the Sun JDK

Before you can begin the installation process, you must download the installation packages for WebLogic Server, ADF Runtime, and Sun Java 6.

To download these packages:

1. To download the WebLogic Server installation package: l
   (a) Go to *http://www.oracle.com/technetwork/middleware/weblogic/downloads/wls-for-dev-1703574.html*.
   (b) Under **Oracle WebLogic Server Previous Releases**, expand the list for Oracle WebLogic Server 10.3.6.
   (c) Download the Generic version of the installer (`wls1036_generic.jar`).



2. To download version 11.1.1.6 of ADF Runtime:
   (a) Go to *http://www.oracle.com/technetwork/developer-tools/adf/downloads/index.html*.
   (b) Under **Downloads for Oracle ADF 11g**, click the **Accept License Agreement** radio button.
   (c) Under **Oracle ADF Downloads**, from the **Application Development Runtime** drop-down list, select **11.1.1.6**.
   (d) Click **Download File**.
   (e) Save the file (`m_appdev_generic_11.1.1.6.0_disk1_of1.zip`) to your machine.
3. To download Sun Java 6:
   (a) Go to *http://www.oracle.com/technetwork/java/javase/downloads/index.html*.
   (b) On the **Downloads** tab, click **Previous Releases**.
   (c) On the **Oracle Java Archive** page, click **Java SE 6**.
   (d) On the **Java SE 6 Downloads** page, click the link for the most recent version of the Java SE Development Kit.

   The page scrolls to the list of downloads for that version of the JDK.

   (e) At the top of the list, click the **Accept License Agreement** radio button.
   (f) In the list, click the **Download** link for Windows x64.
   (g) Save the file (`jdk-6u43-windows-x64.exe`) to your machine.

Downloading the Oracle Endeca Information Discovery installation packages

Before you can install Oracle Endeca Information Discovery, you must download the installation packages for each of the modules from the Oracle Software Delivery Cloud.

To download the installation packages for Oracle Endeca Information Discovery:

1. Log in to *https://edelivery.oracle.com*.
2. On the **Terms and Restrictions** page, check the checkboxes to accept the terms and restrictions, then click **Continue**.
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 **Windows**.
   (c) Click **Go**.

   The list of available packages is displayed.
4. In the list, click **Oracle Endeca Information Discovery Studio (3.0) Media Pack for Microsoft Windows x64 (64-bit)**.

   The list of downloads for the Studio media pack for Windows is displayed.
5. From the list, download the following packages:
   - **Oracle Endeca Information Discovery Studio (3.0) for Microsoft Windows x64 (64-bit) and WebLogic**
   - **Oracle Endeca Information Discovery Provisioning Service (3.0) for Microsoft Windows x64 (64-bit)**
   - **Oracle Endeca Server (7.5.1.1) for Microsoft Windows x64 (64-bit)**
6. After downloading those packages, click **Search Again**.
7. On the **Media Pack Search** page, keep the original selections (**Oracle Endeca** and **Windows**), then click **Go**.
8. Click **Oracle Endeca Information Discovery Integrator (3.0) Media Pack for Microsoft Windows x64 (64-bit)**.

   The list of downloads for the Integrator media pack for Windows is displayed.
9. From the list, download **Oracle Endeca Information Discovery Integrator (3.0) for Microsoft Windows x64 (64-bit)**.

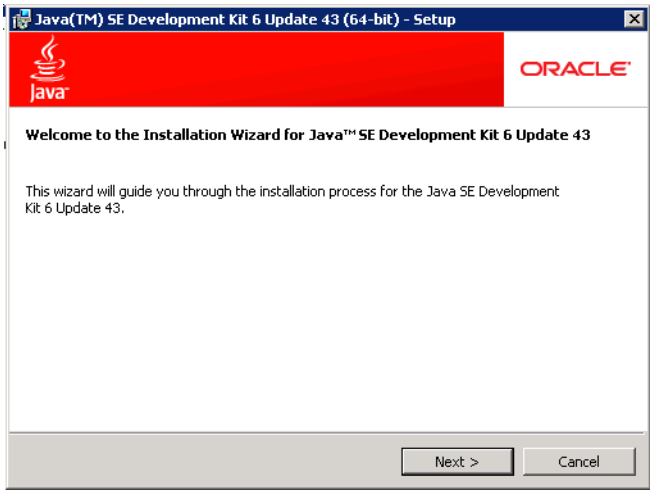
Installing the Sun Java JDK

When you install the Sun Java SDK, you must install it to a path that does not have any spaces.

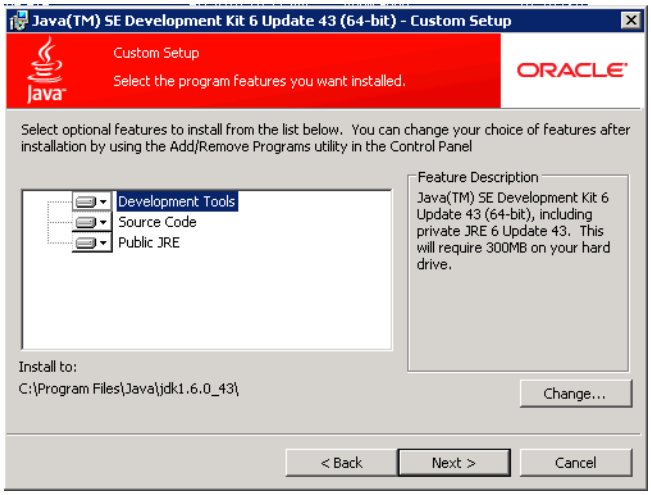
To install the Sun Java SDK:

1. Double-click the JDK installer file that you downloaded (`jdk-6u43-windows-x64.exe`).

   The welcome page of the JDK installation wizard is displayed.

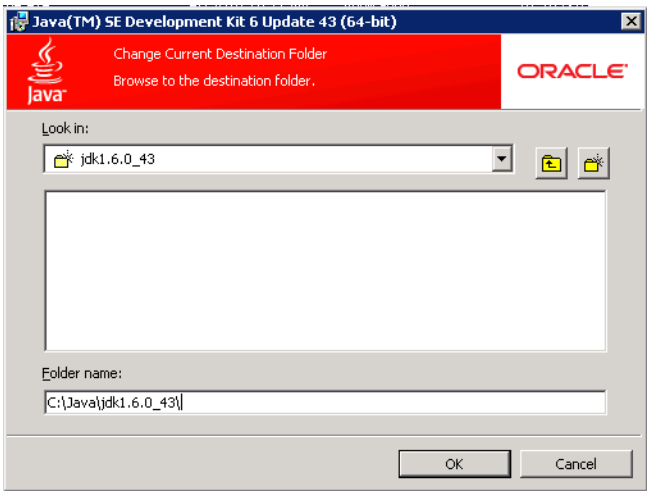


2. On the welcome page, click **Next**.
3. On the **Custom Setup** page, because the default installation location (under `Program Files`) has a space, you must change it here. To change the JDK installation location:



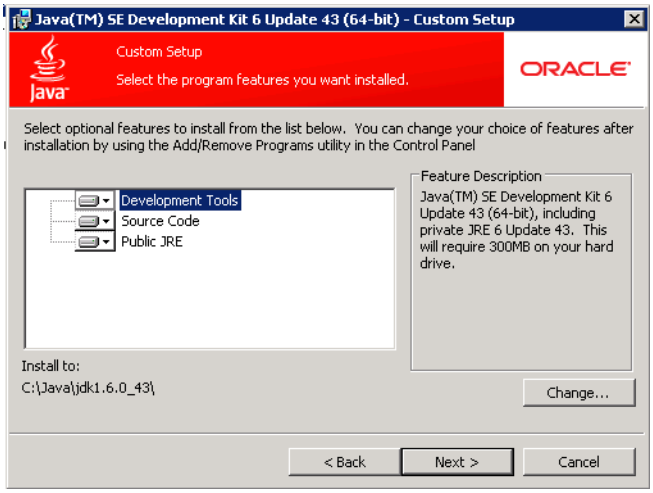
   (a) Click the **Change** button.

(b) In the **Folder name** field, remove the `Program Files` directory. This changes the location to: `C:\Java\jdk1.6.0_43\`

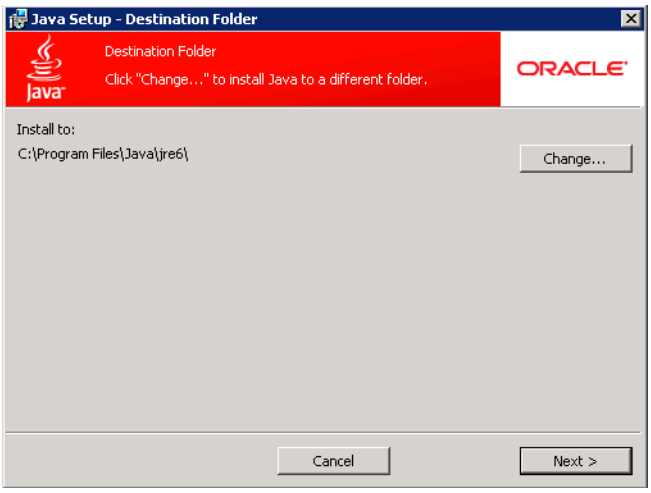


(c) Click **OK**.

(d) On the **Custom Setup** page, verify that the installation location has been updated, then click **Next**.

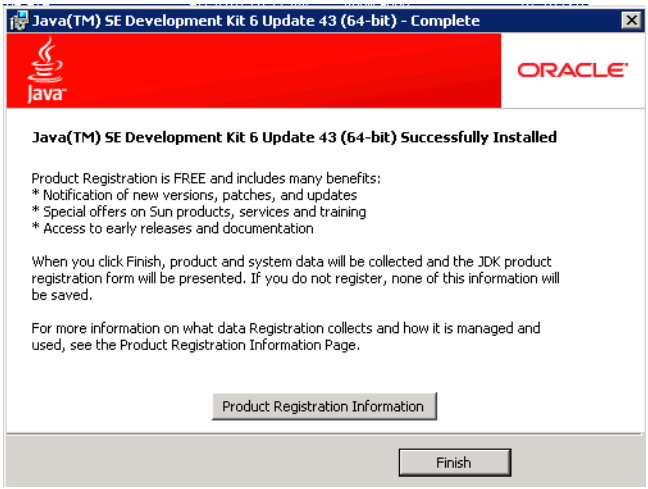


4. The **Destination Folder** page sets the location of the public JRE. Because this JRE is not used by Endeca Information Discovery, you can leave the default directory. Click **Next**.



The installation process begins.

5. When the installation is completed, click **Finish**.



Installing WebLogic Server and ADF Runtime

Once you have the JDK installed, you can install WebLogic Server and ADF Runtime.

Installing WebLogic Server

Installing Oracle ADF Runtime

Installing WebLogic Server

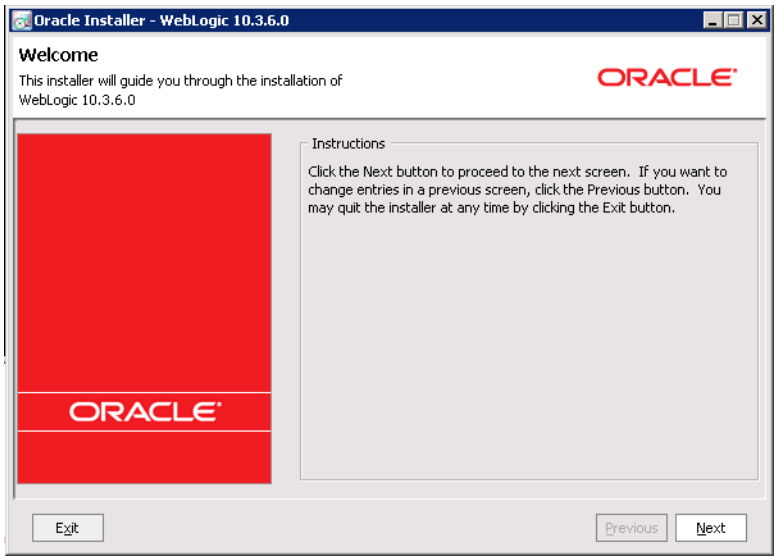
After downloading the installation packages and installing the JDK, you next install WebLogic Server. Note that this procedure only installs the minimum WebLogic Server configuration needed for Oracle Endeca Information Discovery.

To install WebLogic Server:

1. From a command prompt, navigate to the directory where you placed `wls1036_generic.jar`.
2. To launch the installer, issue the following command:

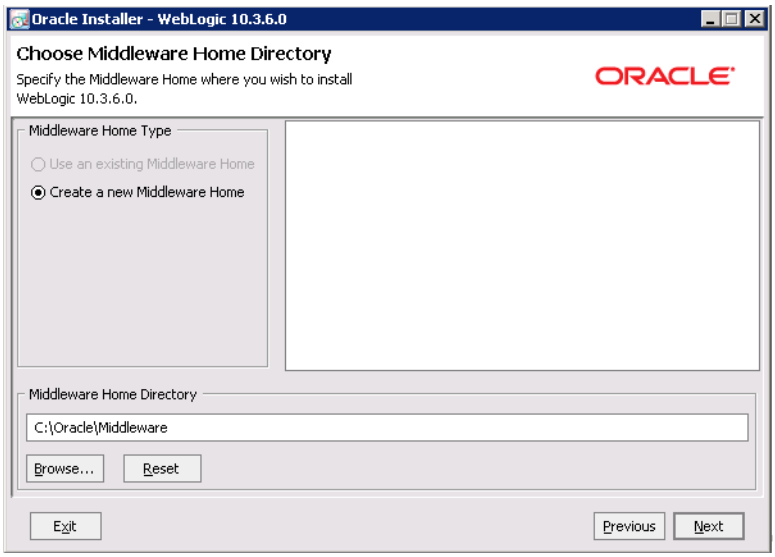
   ```
   java -jar wls1036_generic.jar
   ```

   The **Welcome** page of the installation wizard is displayed.



3. On the **Welcome** page, click **Next**.
4. On the **Choose Middleware Home Directory** page:
   (a) Click the **Create a new Middleware Home** radio button.
   (b) Accept the default location for the Middleware Home Directory.

(c) Click **Next**.



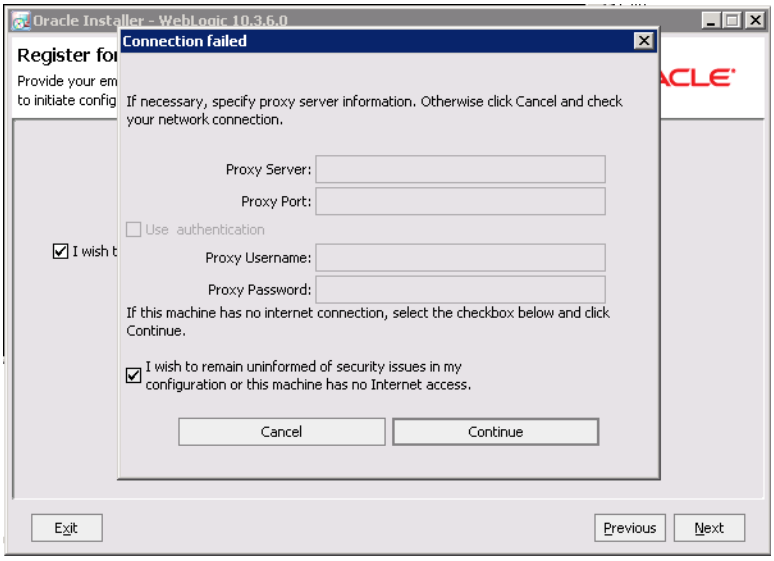
5. To bypass the **Register for Security Updates** page:

(a) Click **Next** without entering an email address.

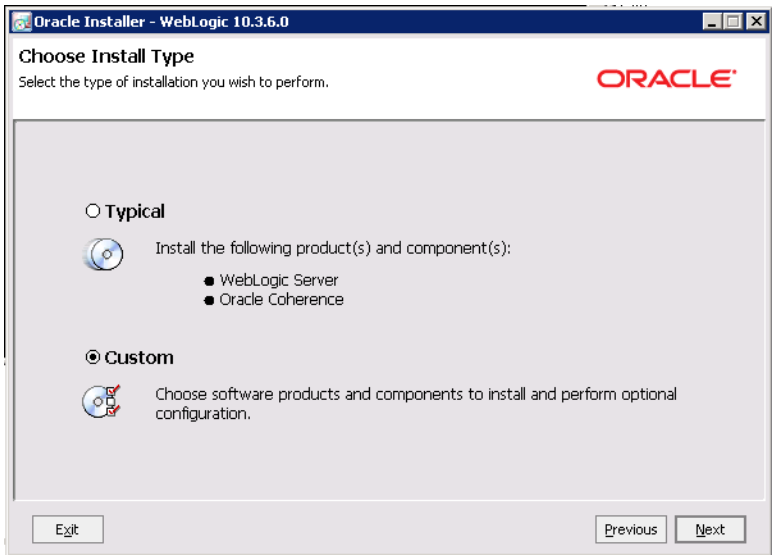
(b) On the **Email Address Not Specified** dialog, click **Yes**.

(c) On the **Are You Sure?** dialog, click **Yes**.

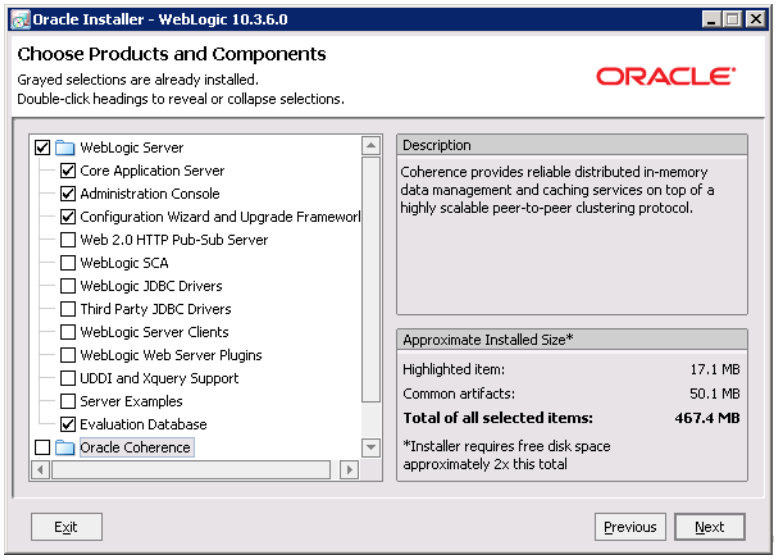
(d) If the **Connection failed** dialog is displayed, check the **I wish to remain uninformed of security issues in my configuration or the machine has no Internet access** checkbox, then click **Continue**.



6. On the **Choose Install Type** page, click the **Custom** radio button, then click **Next**.



7. On the **Choose Products and Components** page, check the following products, then click **Next**:
   - **Core Application Server**
   - **Administration Console**
   - **Configuration Wizard and Upgrade Framework**
   - **Evaluation Database**



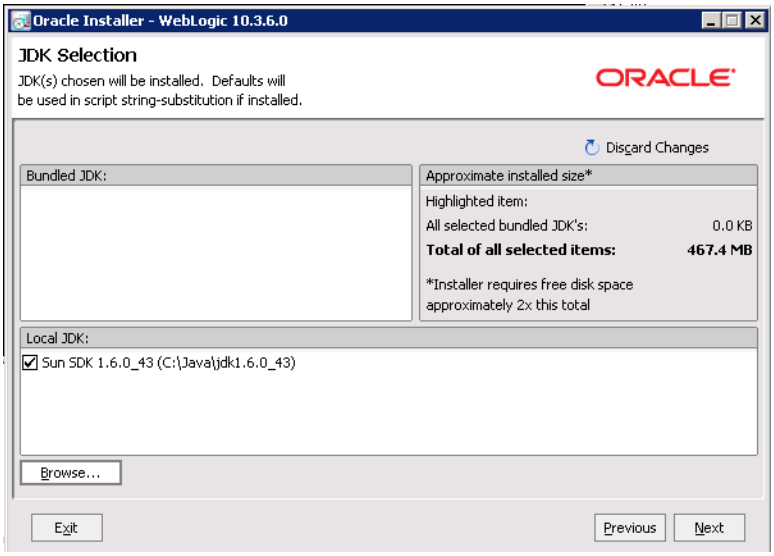
8. On the **JDK Selection** page, verify that the JDK you installed is selected. If it is, click **Next**.

   If that version of the JDK is not selected:

   (a) Under **Local JDK**, click the **Browse** button.

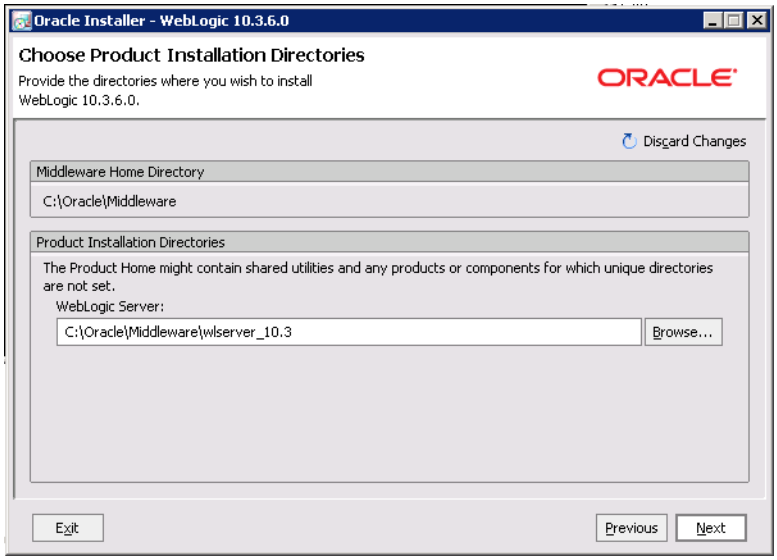
(b) Browse to and select the directory that contains the JDK (`C:\Java\jdk1.6.0_43\`).

The **Local JDK** section is updated to display the selected JDK with a checked box next to it.

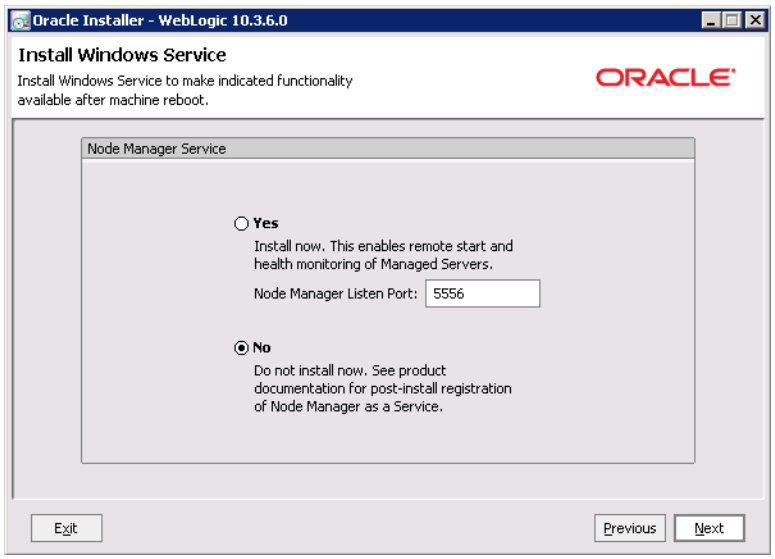


(c) Click **Next**.

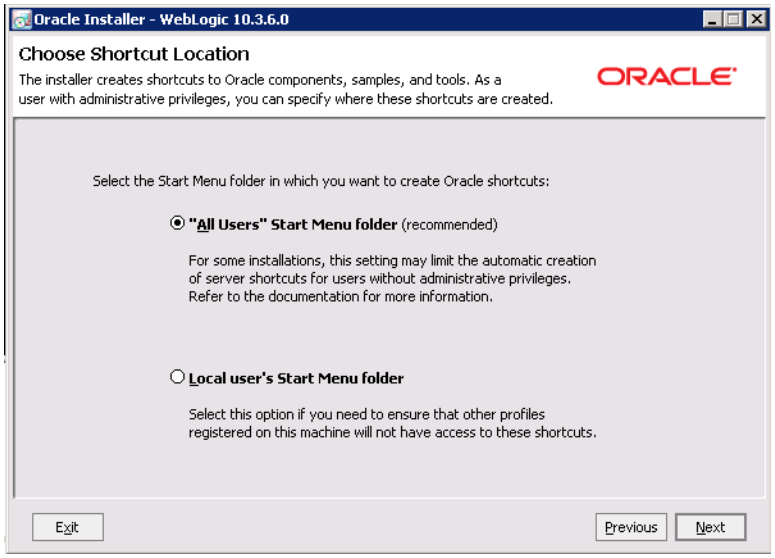
9. On the **Choose Product Installation Directories** page, accept the default installation directory, then click **Next**.



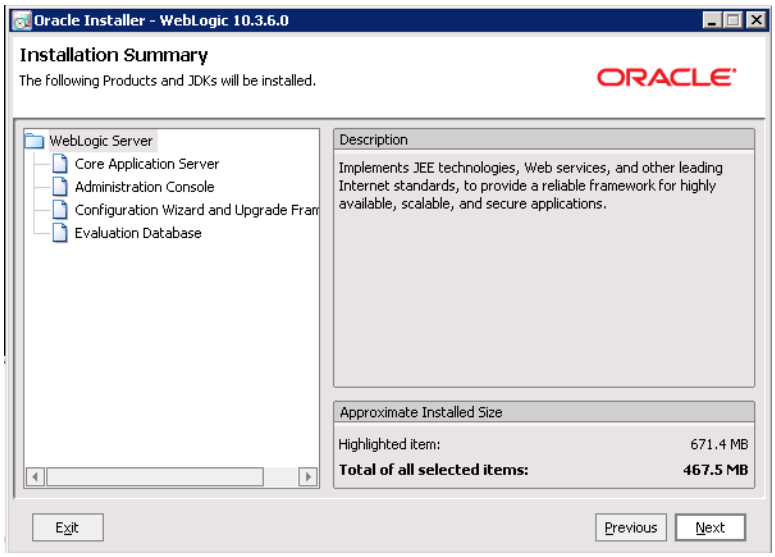
10. If the **Install Windows Service** page is displayed, click the **No** radio button, then click **Next**.



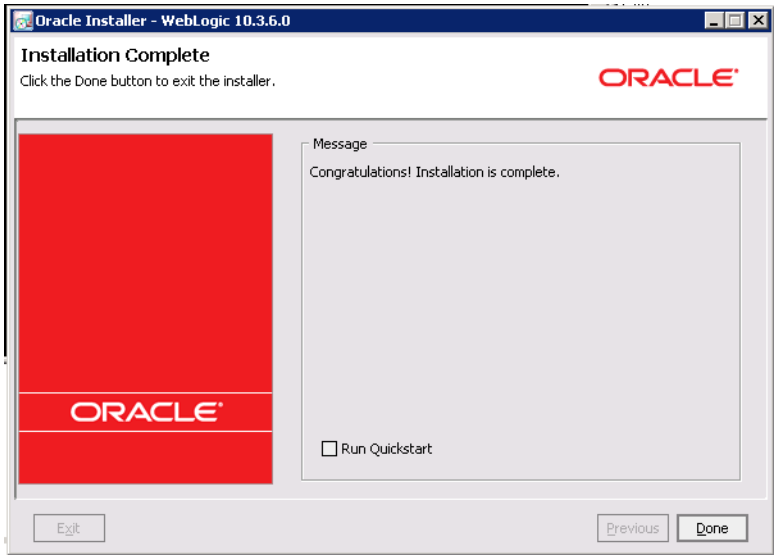
11. If the **Choose Shortcut Location** page is displayed, click a radio button to select the location of the Windows shortcut, then click **Next**.



12. On the **Installation Summary** page, verify that you are installing the correct products, then click **Next**.



13. On the **Installation Complete** page, uncheck the **Run Quickstart** checkbox, then click **Done**.



An Oracle WebLogic shortcut is created in the **Start Menu**.

Installing Oracle ADF Runtime

After you install WebLogic Server, you next install ADF Runtime 11.1.1.6, which contains the JRF needed by Oracle Endeca Server.

To install Oracle ADF Runtime:

1. Unpack the ADF zip package (`m_appdev_generic_11.1.1.6.0_disk1_of1.zip`).

   The package contains:

   - `readme.htm` file

- `Disk1` directory
- `Disk2` directory

2. From a command prompt, change to the `Disk1` directory.
3. Run the installer:

```
setup.exe -jreLoc <jre_location>
```

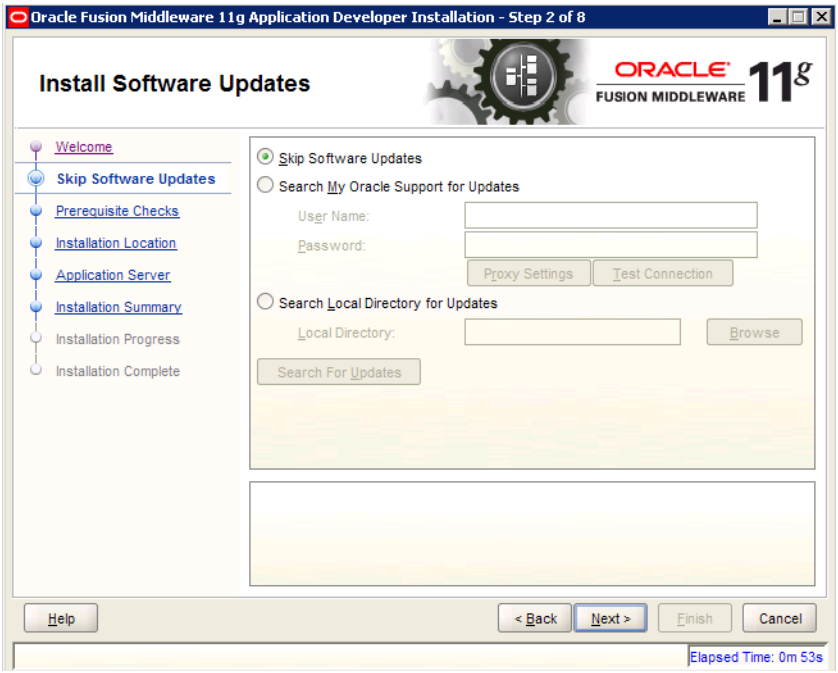
<jre_location> is the full path to the location of the Sun Java 6 JRE (Java Runtime Environment) that you installed. The JRE is located in the JDK installation directory.

For example:

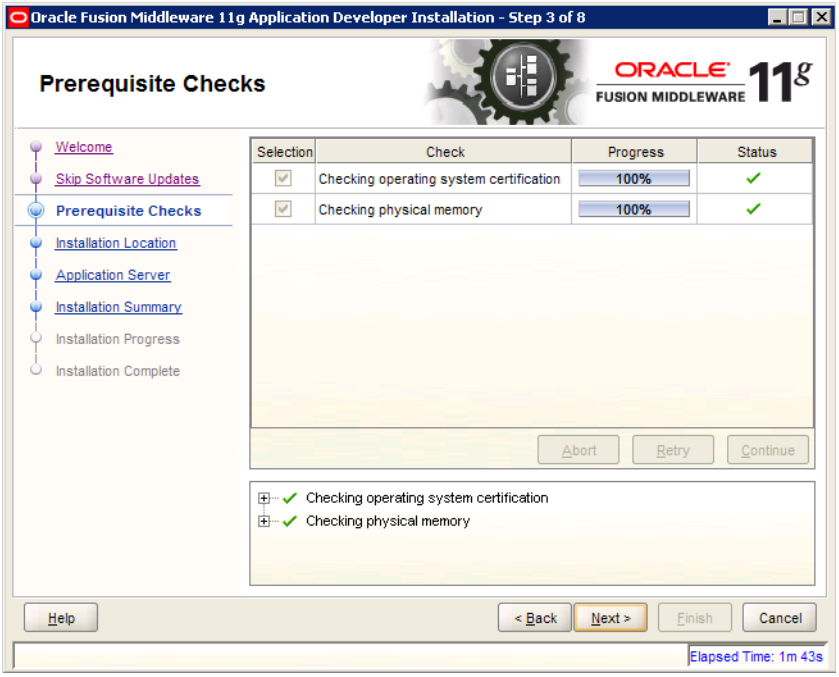
```
setup.exe -jreLoc c:\Java\jdk1.6.0_43\jre
```

The **Welcome** page of the ADF installation wizard is displayed.

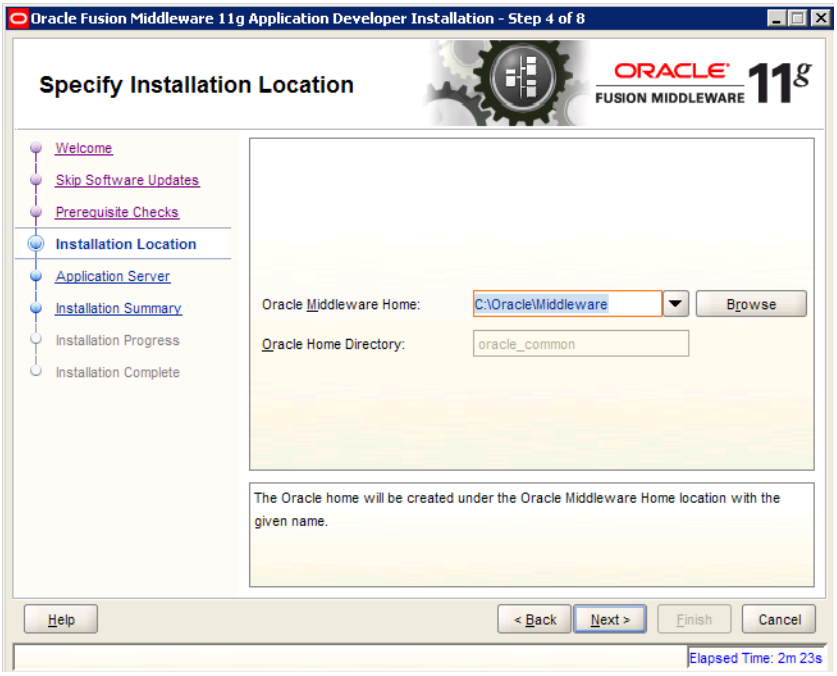
4. On the **Welcome** page, read the information, then click **Next**.
5. On the **Install Software Updates** page, click the **Skip Software Updates** radio button, then click **Next**.



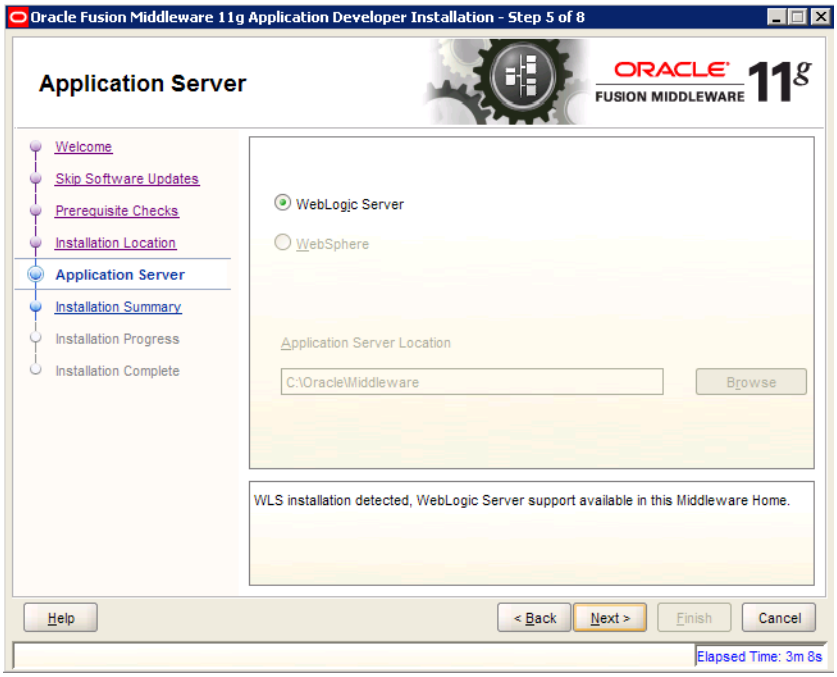
6. On the **Prerequisite Checks** page, wait until the installation process passes all the necessary checks. If everything passes the checks, click **Next**.



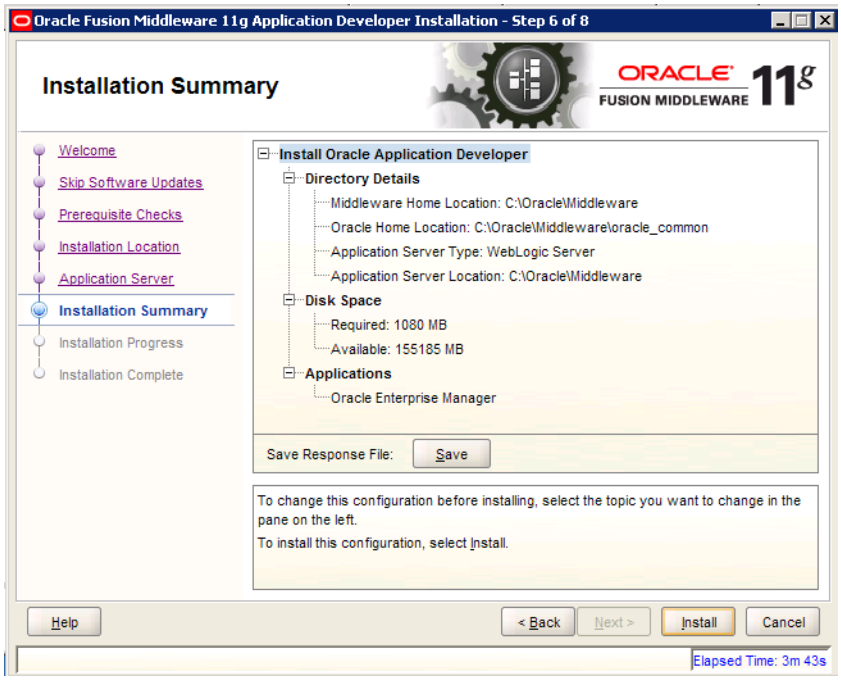
7. On the **Specify Installation Location** page, verify that the Oracle Middleware Home directory is the location where you installed WebLogic, then click **Next**.



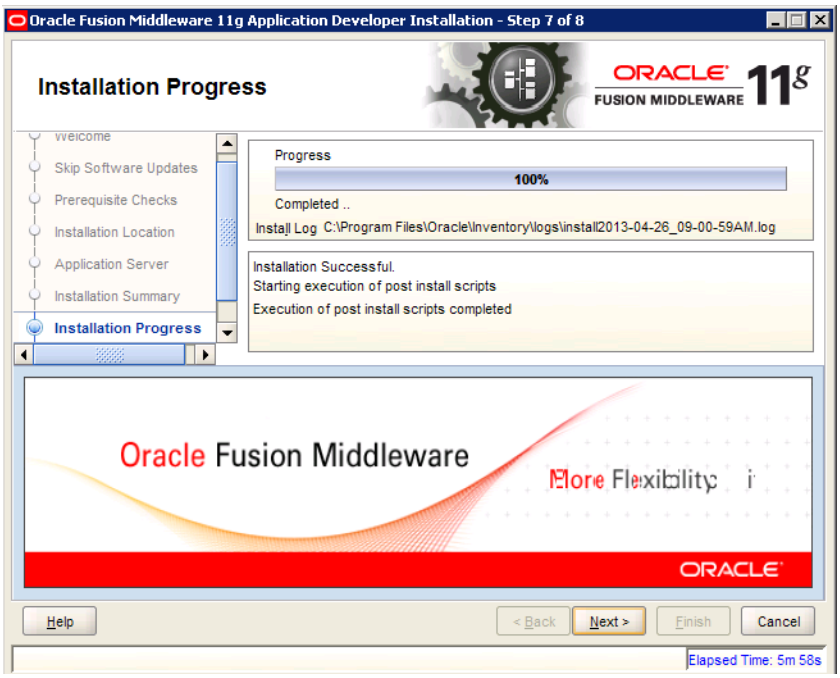
8. On the **Application Server** page, click the **WebLogic Server** radio button, then click **Next**.



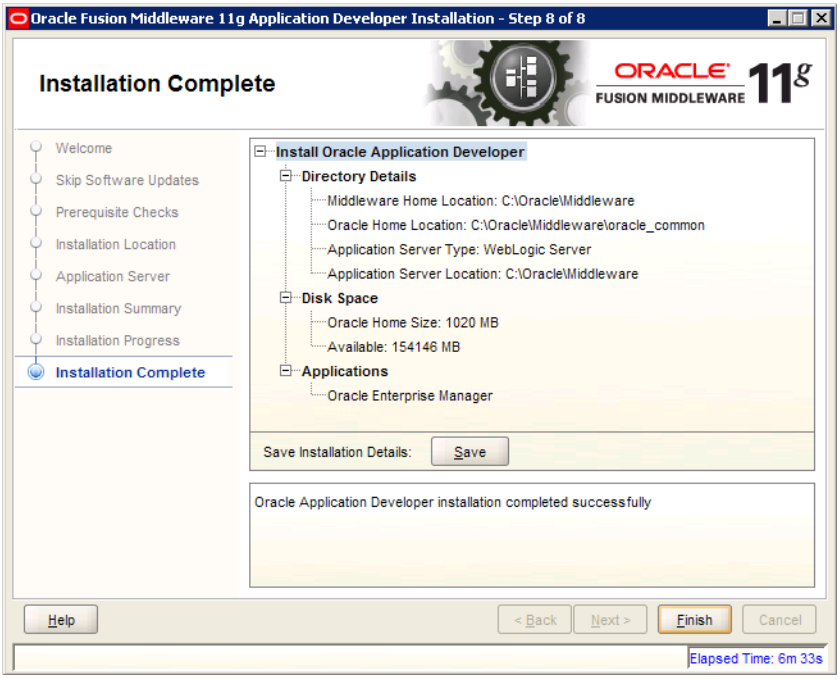
9. On the **Installation Summary** page, verify the installation details, then click **Install**.



10. On the **Installation Progress** page, when the installation process has completed, click **Next**.



11. On the **Installation Complete** page, to exit the installer, click **Finish**.



Two shortcuts are created in the **Start Menu**:

- Oracle Application Developer 11g
- Oracle Common Home 11g

Installing Oracle Endeca Server

For Endeca Server, you first install the application, then create a WebLogic domain for it.

Running the Oracle Endeca Server installer

Creating the WebLogic domain for Endeca Server

Verifying the Endeca Server deployment

Running the Oracle Endeca Server installer

Next, you install the Oracle Endeca Server package.

To install Oracle Endeca Server:

1. Unpack the Endeca Server zip file to a temporary directory.

   The resulting `endecaserver` directory contains a `Disk1` subdirectory.

2. From a command prompt, change to the `Disk1` directory, then run the installer:

   ```
   setup.exe -jreLoc <jre_location>
   ```

   <jre_location> is the full path to the location of the Sun Java 6 JRE (Java Runtime Environment) that you installed earlier.

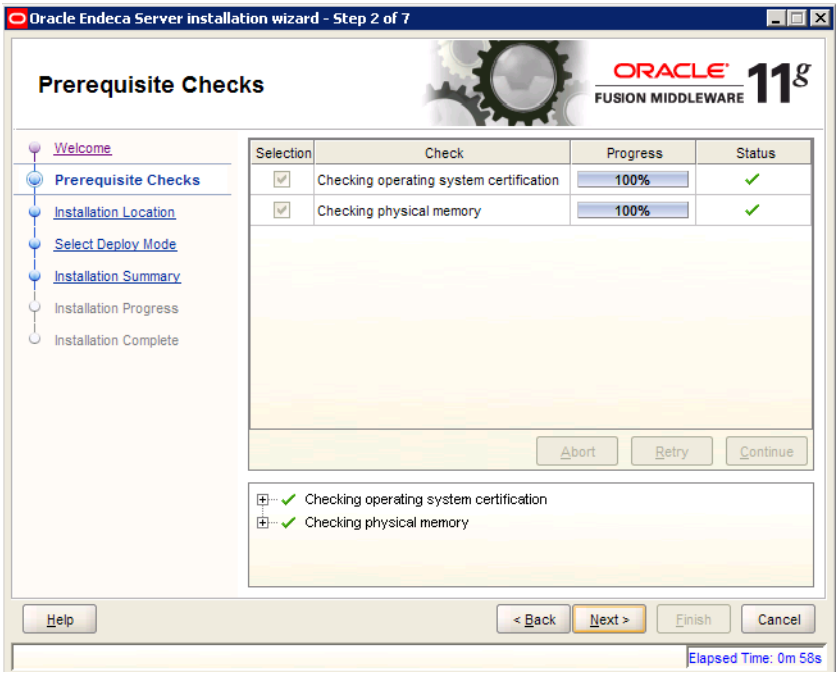
   For example:

   ```
   setup.exe -jreLoc C:\Java\jdk1.6.0_43\jre
   ```

   The installation wizard **Welcome** page is displayed.

3. On the **Welcome** page, read the information, then click **Next**.

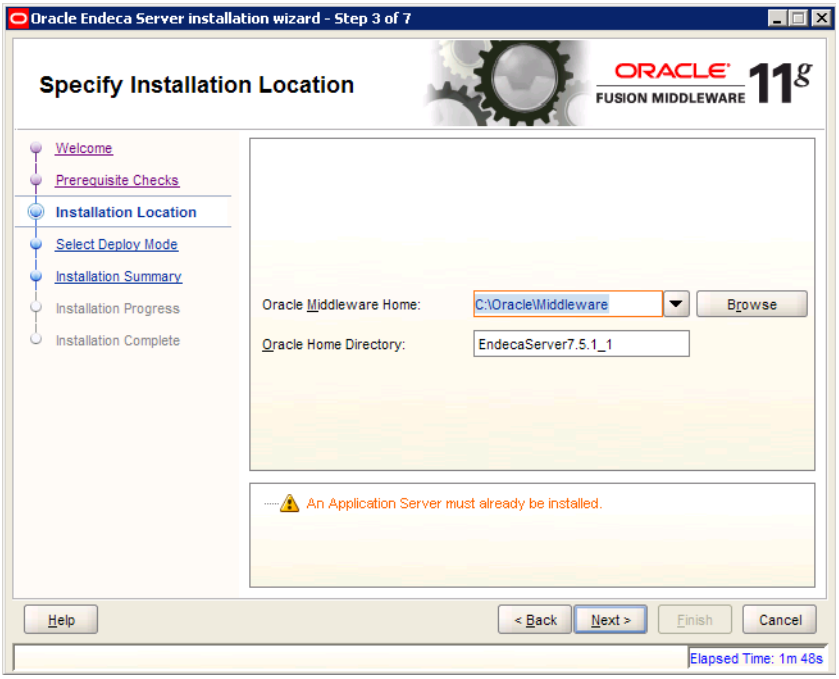
4. On the **Prerequisite Checks** page, if everything passes the checks, click **Next**.



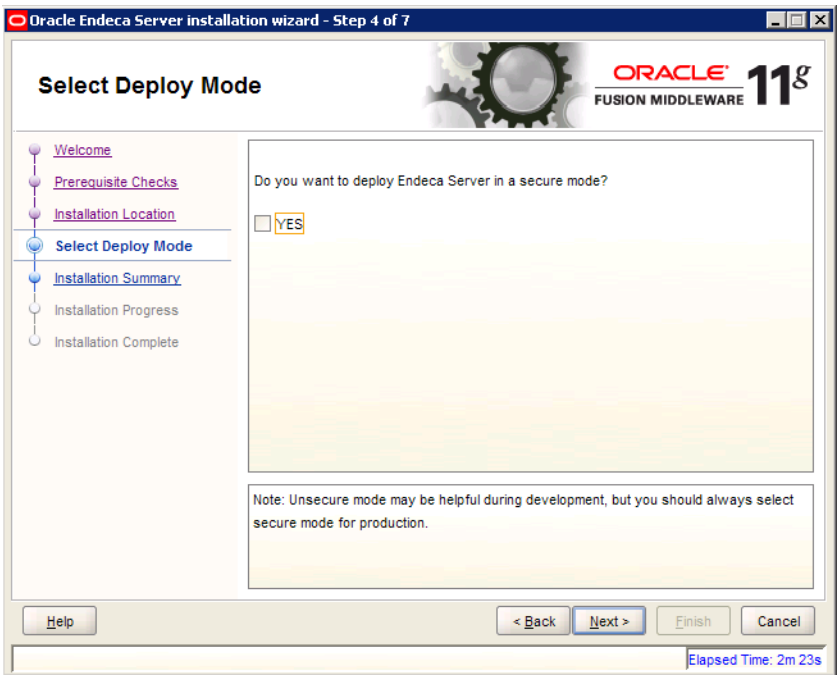
5. On the **Specify Installation Location** page:
   (a) For the **Oracle Middleware Home** field, verify the name of the Oracle Middleware home directory.
   (b) For the **Oracle Home Directory** field, accept the default Endeca Server home directory.

   This is the root directory of the Endeca Server installation.

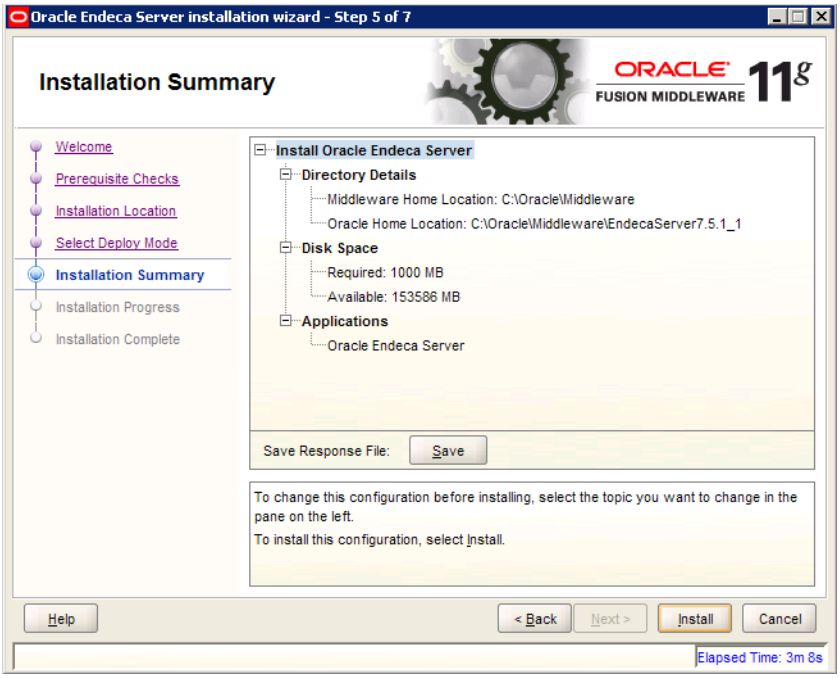
   (c) Click **Next**.



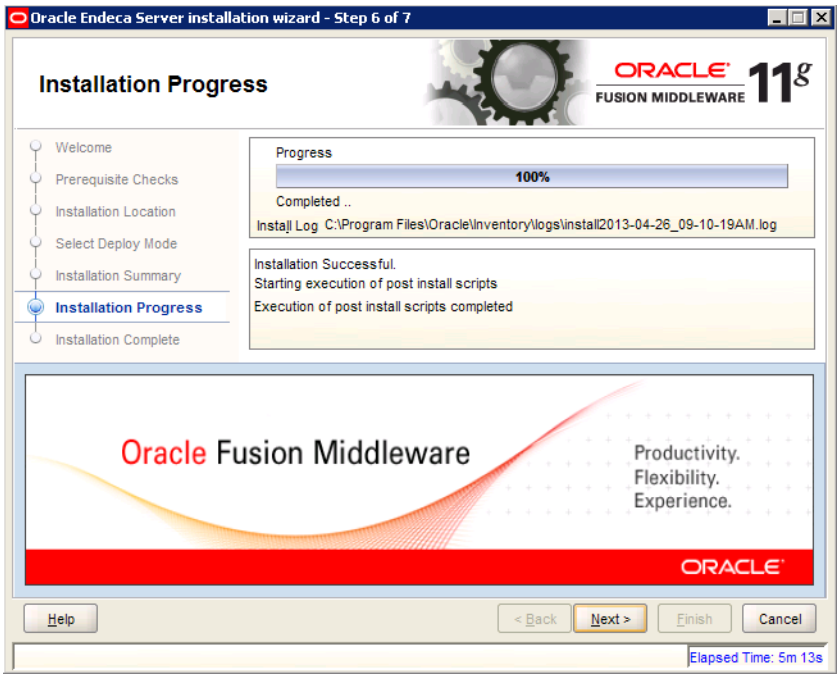
6. On the **Select Deploy Mode** page, uncheck the **YES** checkbox, then click **Next**.



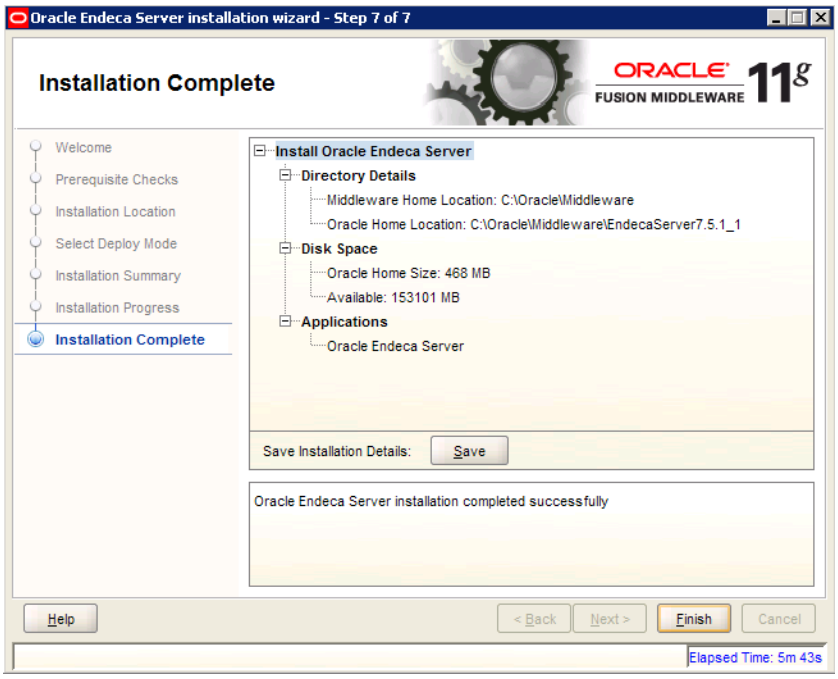
7. On the **Installation Summary** page, verify the installation details, then click **Install**.



8. On the **Installation Progress** page, when the installation progress has completed, click **Next**.



9. On the **Installation Complete** page, to exit the installation wizard, click **Finish**.



When the installation finishes, the Endeca Server files and directories are written to the Oracle Home Location.

Creating the WebLogic domain for Endeca Server

The Endeca Server installation includes a WebLogic domain template that you use to create the Endeca Server WebLogic domain.

To create the WebLogic domain for Endeca Server:

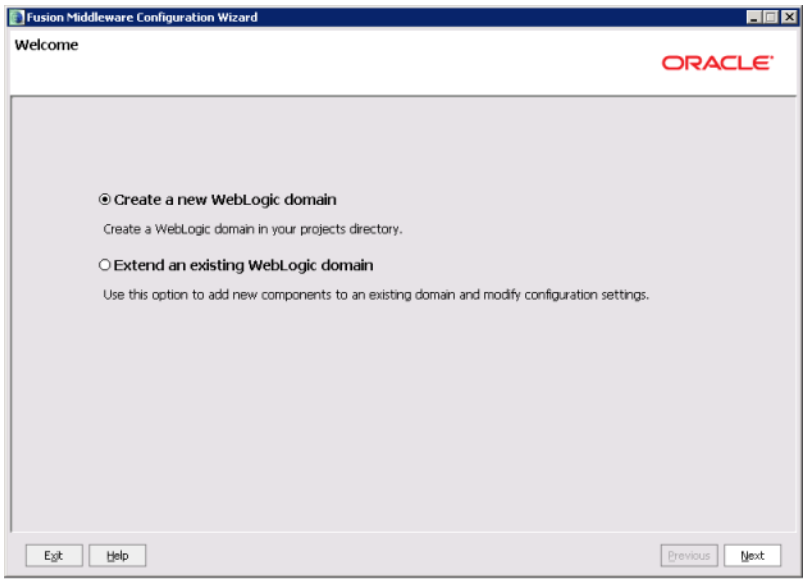
1. From a command prompt, change to the directory that contains the Configuration Wizard start-up program:

   ```
   C:\Oracle\Middleware\wlserver_10.3\common\bin
   ```

2. To start the Configuration Wizard, run the following command:

   ```
   config.cmd
   ```

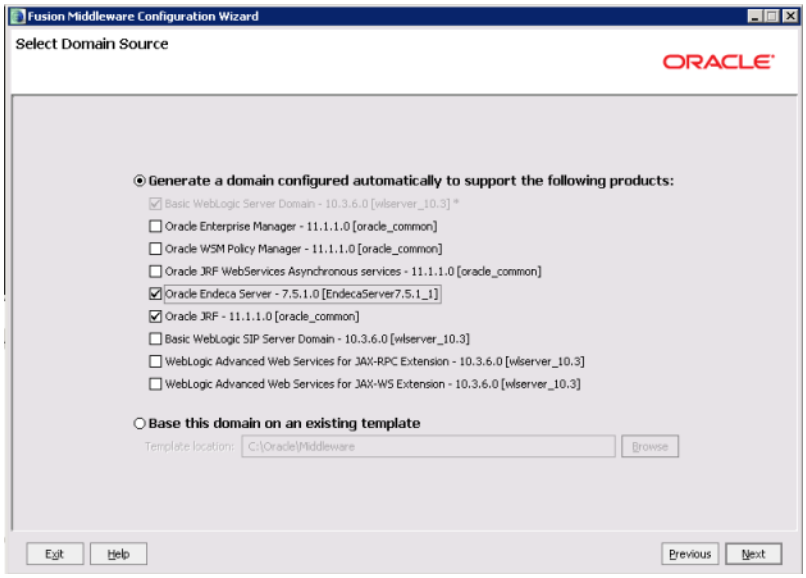
   The Configuration Wizard **Welcome** page is displayed.

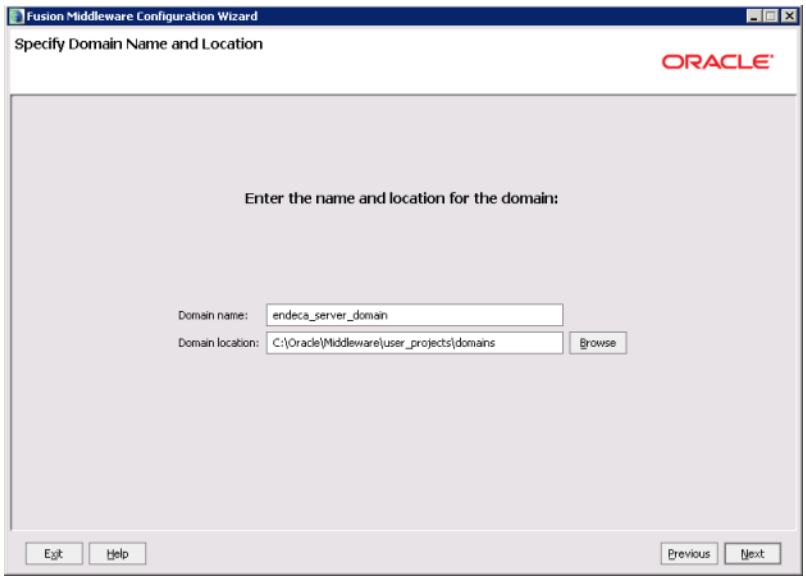
3. On the **Welcome** page, click the **Create a new WebLogic domain** radio button, then click **Next**.

4. On the **Select Domain Source** page, check the **Oracle Endeca Server** checkbox.

   The **Oracle JRF** checkbox is then checked automatically. Click **Next**.



5. On the **Specify Domain Name and Location** page:
   (a) Set the domain name to `endeca_server_domain`.
   (b) Keep the default domain location.
   (c) Click **Next**.



6. On the **Configure Administrator User Name and Password** page, to create the administrator credentials for starting WebLogic Server:
   (a) In the **Name** field, type the name for the new administrator user.

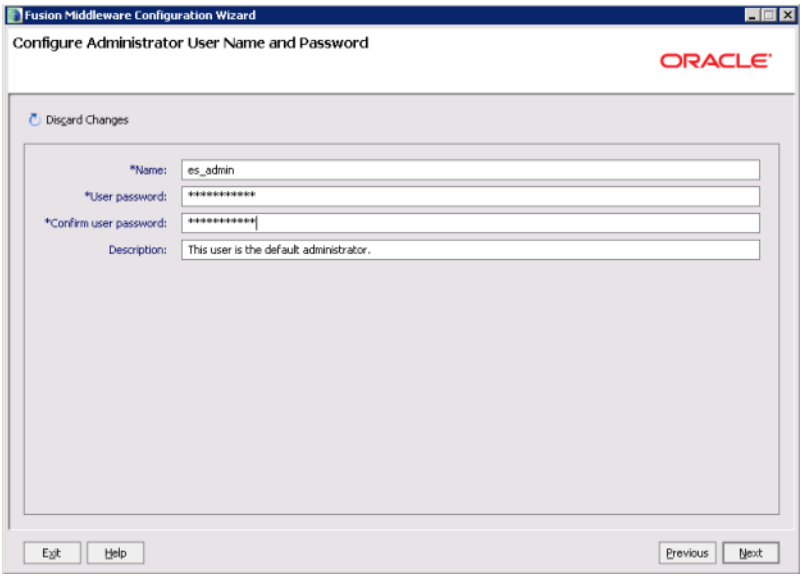
(b) In the **User password** field, type the user password.

The password must be at least eight alphanumeric characters long, and contain at least one number or special character.

(c) In the **Confirm user password** field, retype the password.

(d) Optionally, in the **Description** field, type a description for the user account.

(e) Click **Next**.



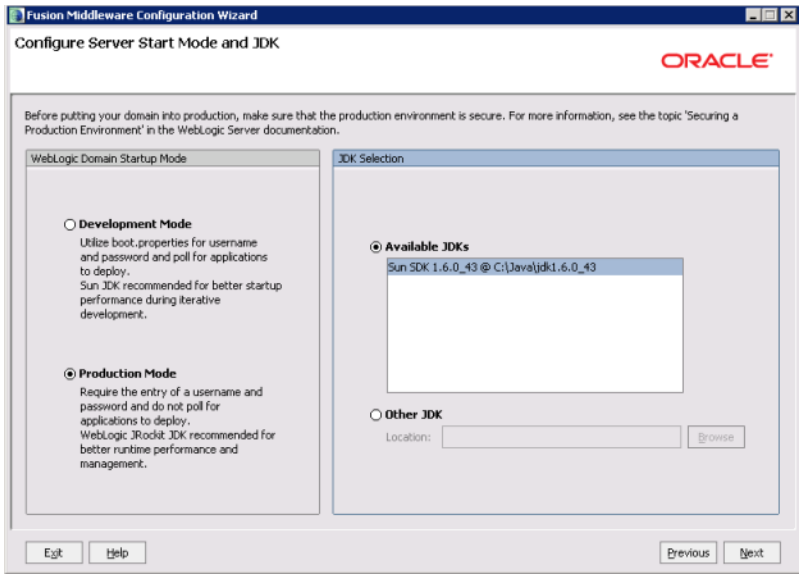
7. On the **Configure Server Start Mode and JDK** page:

(a) Under **WebLogic Domain Startup Mode**, click the **Production Mode** radio button.

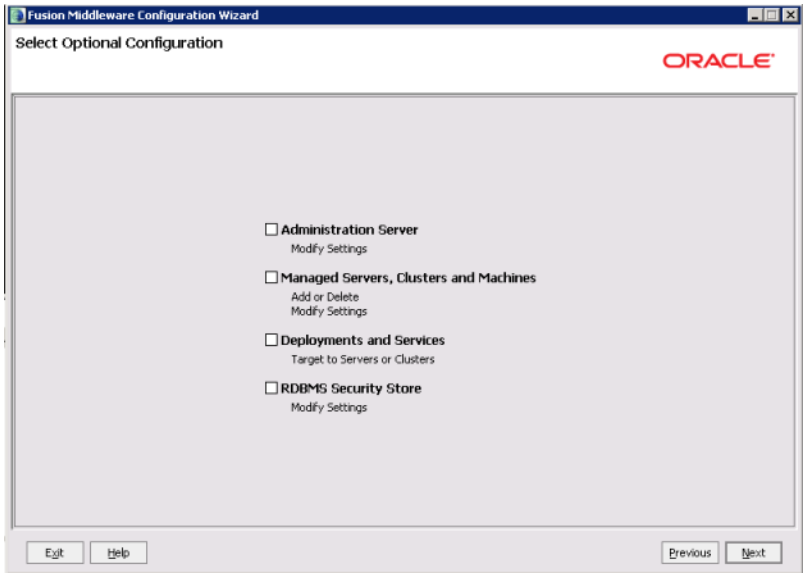
(b) Under **JDK Selection**, click the **Available JDKs** radio button.

(c) In the JDK list, click the **Sun Java SDK** that you installed. If the Sun Java JDK is not displayed, click the **Other JDK** button, and then browse for the Sun Java JDK home: `C:\Java\jdk1.6.0_43\`

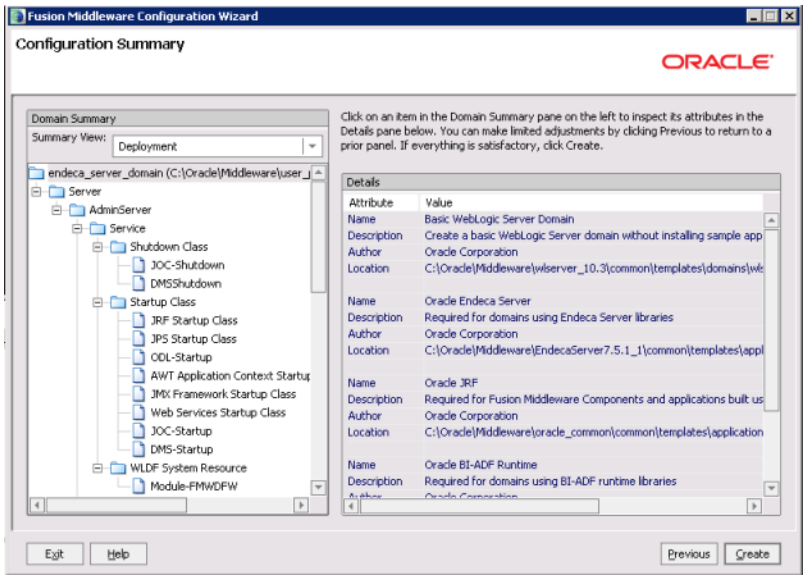
(d) Click **Next**.



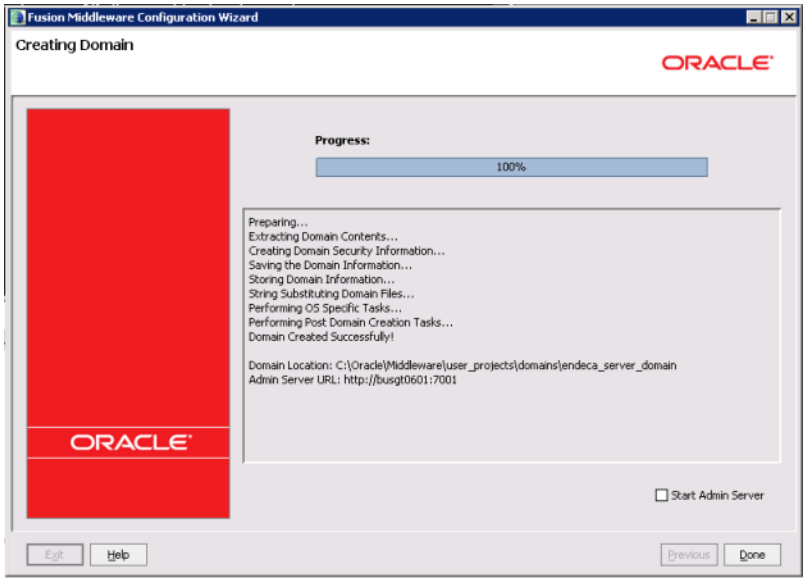
8. On the **Select Optional Configuration** page, do not select any optional configurations. Click **Next**.



9. On the **Configuration Summary** page, to create the domain, click **Create**.



On the **Creating Domain** page, the message "Domain Created Successfully!" signifies the end of the domain creation process.



10. To exit the Configuration Wizard, click **Done**.

Verifying the Endeca Server deployment

After installing the Endeca Server, you should verify that the Endeca Server application was correctly deployed.

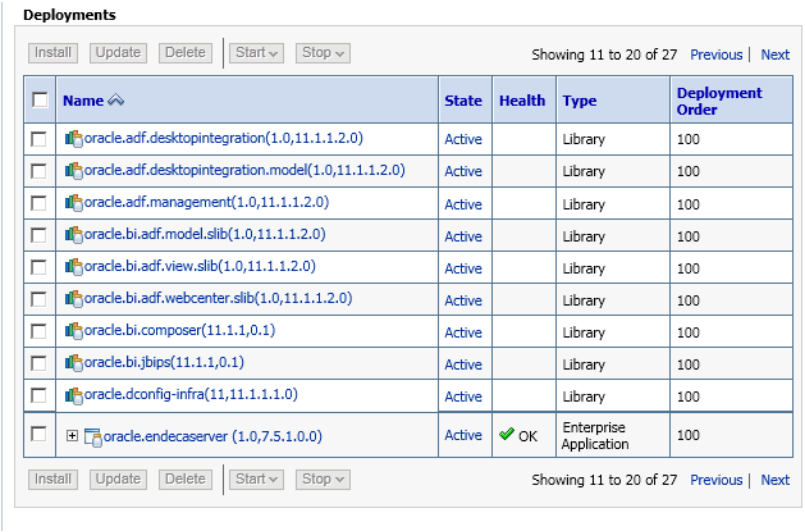
To verify the Endeca Server application deployment:

1. To start the Admin Server for the Endeca Server domain, run `C:\Oracle\Middleware\user_projects\domains\endeca_server_domain\startWebLogic.cmd`.

   Alternatively, from the Windows **Start** menu, select **Oracle WebLogic>User Projects>endeca_server_domain>Start Admin Server for Weblogic Server Domain**.
2. When prompted, enter the administrator user name and password for the Endeca Server domain.
3. From a Web browser, go to the Administration Server console at `http://localhost:7001/console`.
4. On the Administration Console login page, log in using the domain administrator user name and password.
5. Under **Domain Structure**, in the **endeca_server_domain** tree, click **Deployments**.

6. In the **Deployments** table, check the **oracle.endecaserver** Web application (on the second page of the list).

   Its **State** should be "Active" and its **Health** should be "OK".



Installing Integrator

Integrator is installed as a machine-wide installation on Windows.

This type of installation requires administrator permissions and is used because it is intended for a production environment. To complete this installation, you need the Integrator package you downloaded from the Oracle Software Delivery Cloud.

To install Integrator on a Windows client:

1. From the Integrator package, extract `EID_3.0_Integrator_designer.exe`.

   This is the Integrator installer file.

2. To start the wizard, double-click the installer file.

   The wizard verifies the contents of the installation package.

3. To begin the installation process, click **Next**.
4. On the **Copyright and Legal** page, click **Next**.
5. On the **Destination Folder** page, accept the default installation directory, then click **Next**.

   You must install Integrator into an empty directory.

6. On the **Completing the Setup Wizard** page, click **Next**.

   The wizard begins to install the Integrator files.

7. When the wizard confirms that you have successfully completed the installation, click **Finish**.
8. After installation, to start the program, double-click the Integrator shortcut icon.

Installing Studio

To install Studio, you first create the WebLogic domain for it, then deploy Studio into that domain.

Creating the WebLogic domain for Studio

Deploying Studio into the domain

Creating the WebLogic domain for Studio

Before you can install Studio, you must create the WebLogic domain in which to deploy it.

To create the WebLogic domain for Studio:

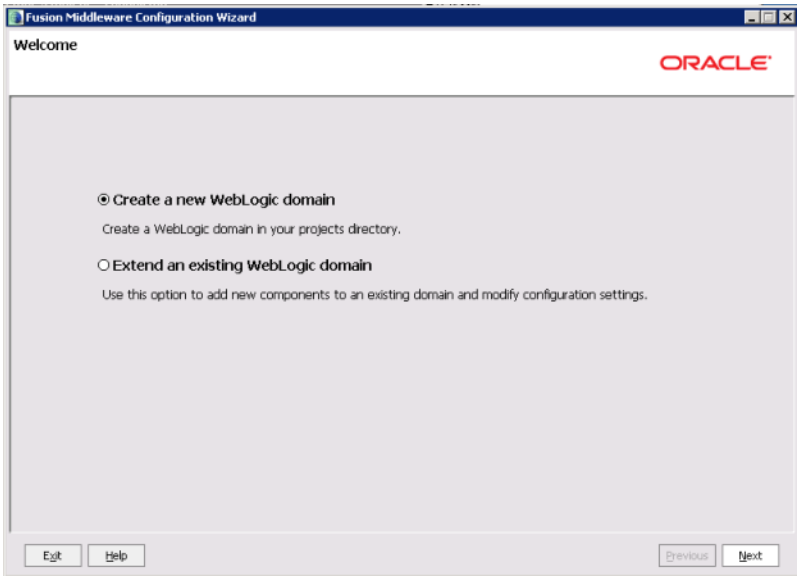
1. From a command prompt, change to the directory that contains the Configuration Wizard start-up program:

   ```
   C:\Oracle\Middleware\wlserver_10.3\common\bin
   ```

2. To start the Configuration Wizard, run the following command:

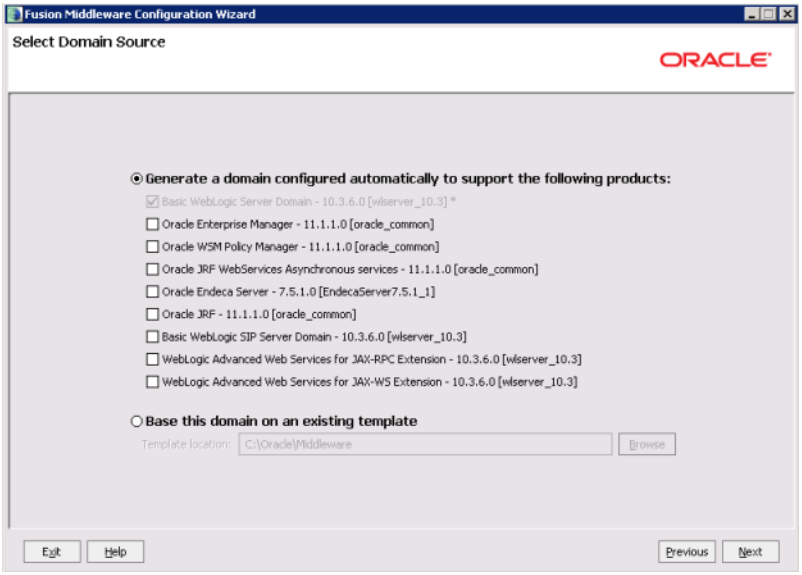
   ```
   config.cmd
   ```

   The Configuration Wizard **Welcome** page is displayed.

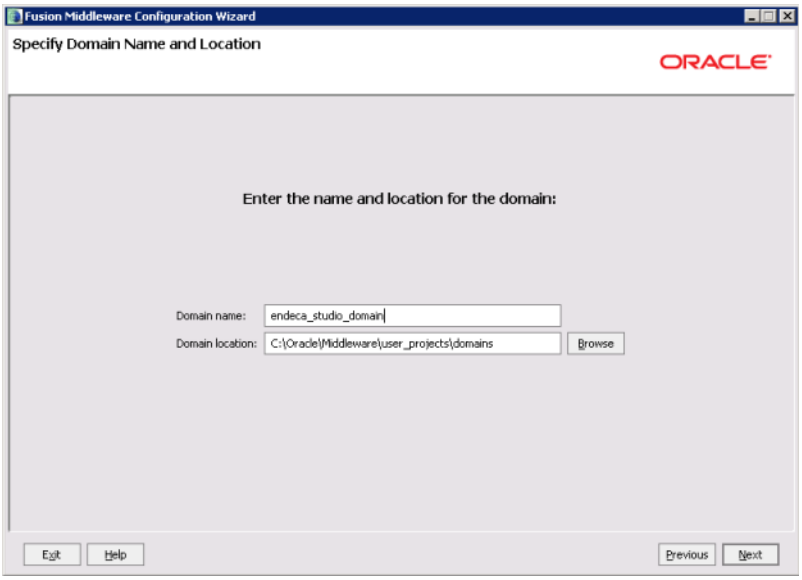


3. On the **Welcome** page, click the **Create a new WebLogic** domain radio button, then click **Next**.

4. On the **Select Domain Source** page, the **Basic WebLogic Server Domain** checkbox is checked by default. Click **Next**.



5. On the **Specify Domain Name and Location** page:
   (a) Set the domain name to `endeca_studio_domain`.
   (b) Keep the default domain location.
   (c) Click **Next**.



6. On the **Configure Administrator User Name and Password** page, to create the administrator credentials for starting the Studio domain:
   (a) In the **Name** field, type the name for the new administrator user.

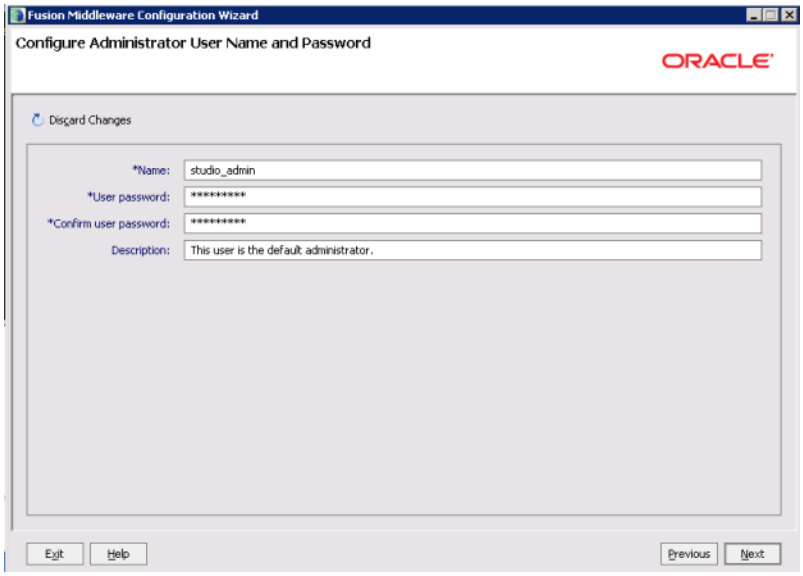
(b) In the **User password** field, type the user password.

The password must be at least eight alphanumeric characters long and contain at least one number or special character.

(c) In the **Confirm user password** field, retype the password.

(d) Optionally, in the **Description** field, type a description for the user account.

(e) Click **Next**.



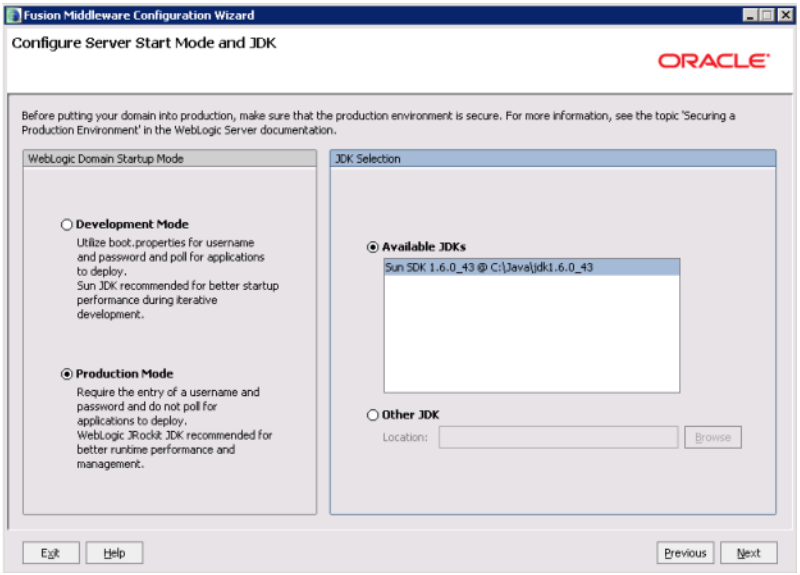
7. On the **Configure Server Start Mode and JDK** page:

(a) Under **WebLogic Domain Startup Mode**, click the **Production Mode** radio button.

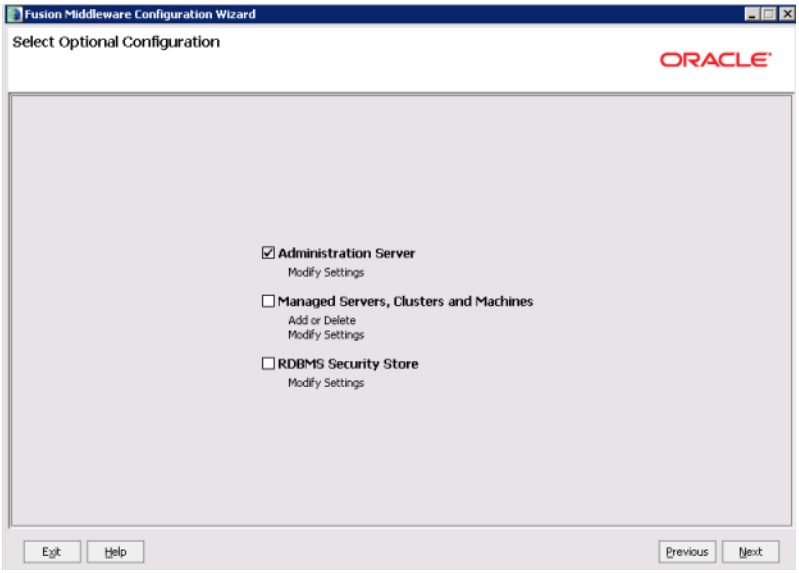
(b) Under **JDK Selection**, click the **Available JDKs** radio button.

(c) In the JDK list, click the Sun Java JDK that you installed earlier. If the JDK is not displayed, click the **Other JDK** button, and then browse to it (`C:\Java\jdk1.6.0_43\`).

(d) Click **Next**.

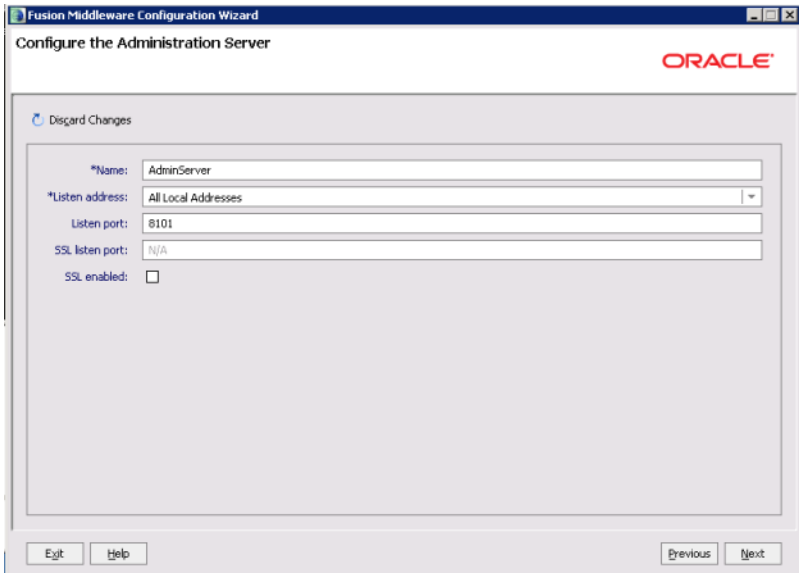


8. On the **Select Optional Configuration** page, check the **Administration Server** checkbox, then click **Next**.

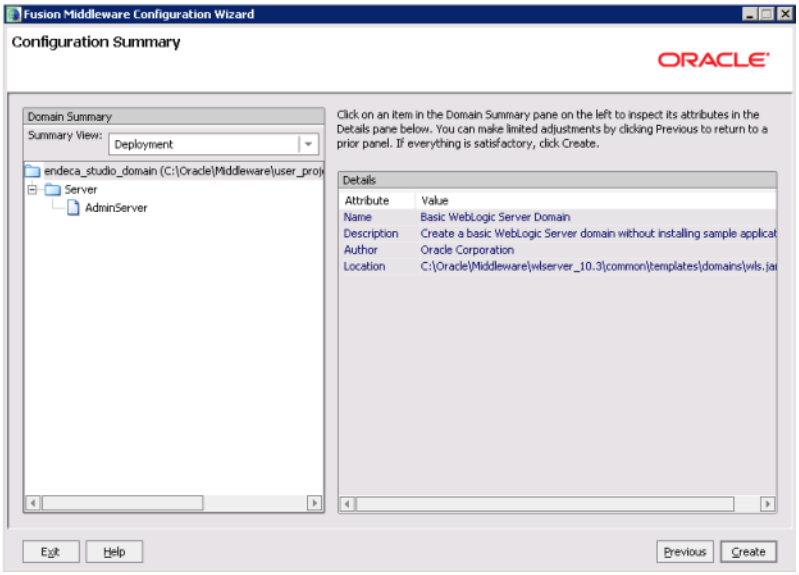


9. On the **Configure the Administration Server** page:
   (a) Use the default values for the **Name** and **Listen address** fields.
   (b) In the **Listen port** field, type `8101`.

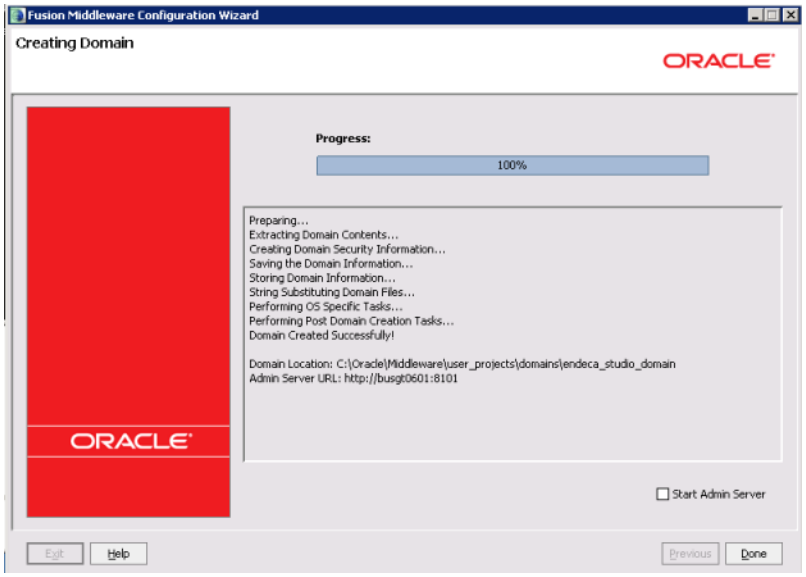
(c) Click **Next**.


Fusion Middleware Configuration Wizard
Configure the Administration Server
ORACLE
Discard Changes
*Name:
AdminServer
*Listen address:
All Local Addresses
Listen port:
8101
SSL listen port:
N/A
SSL enabled:
Exit
Help
Previous
Next

10. On the **Configuration Summary** page, to create the domain, click **Create**.



On the **Creating Domain** page, the message "Domain Created Successfully!" signifies the end of the domain creation process.



11. To exit the Configuration Wizard, click **Done**.
12. Update `setDomainEnv.cmd`.

    The file is located in the `bin` subdirectory of the domain directory (`C:\Oracle\Middleware\user_projects\domains\endeca_studio_domain\bin`) .

    (a) Add the `JAVA_OPTIONS` argument close to the top of the file.

```
set JAVA_OPTIONS=-DUseSunHttpHandler=true -Djavax.xml.transform.TransformerFactory
=com.sun.org.apache.xalan.internal.xsltc.trax.TransformerFactoryImpl
-Djavax.xml.parsers.DocumentBuilderFactory
=com.sun.org.apache.xerces.internal.jaxp.DocumentBuilderFactoryImpl
-Djavax.xml.parsers.SAXParserFactory
```

```
=com.sun.org.apache.xerces.internal.jaxp.SAXParserFactoryImpl
```

Note that if you're copying and pasting out of this guide, make sure to remove any line breaks after pasting the text into the file.

(b) Update all of the Java perm size arguments in the file to replace all occurrences of `-XX:MaxPermSize=128m` and `-XX:MaxPermSize=256m` with `-XX:MaxPermSize=512m`.

(c) Update all of the memory arguments in the file to replace all occurrences of `-Xmx512m` with `-Xmx1024m`.

13. To verify that there are no conflicting applications on the domain's root context:

(a) Start the domain.

In `C:\Oracle\Middleware\user_projects\domains\endeca_studio_domain`, run `startWebLogic.cmd`.

Alternatively, from the Windows **Start** menu, select **Oracle WebLogic>User Projects>endeca_studio_domain>Start Admin Server for Weblogic Domain**.

(b) When prompted, enter the domain user name and password.

(c) After the domain is started, in a browser, go to the root context path

`http://<serverName>:<portNumber>`

For example: `http://localhost:8101`

If you get a "page not found" (404) error, then there are no applications on the domain's root context, and you can continue the Studio installation process.

If you see the login page for a previously deployed Studio application, then you should un-deploy this application.

If you see another application, then you should log in to the WebLogic Console, and then either remove the application or untarget it from the WebLogic Server instance.

For example, one common conflicting application is Oracle Enterprise Manager, which deploys an application to `/em`, but also installs the FMW Welcome Page Application to the root context.

Deploying Studio into the domain

To install Studio, you use the WebLogic Administration Console to deploy `endeca-portal-weblogic-3.0.x.ear` into the WebLogic domain.

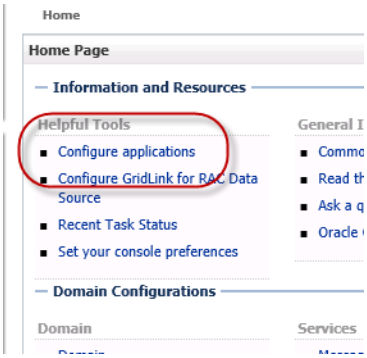
When you deploy using these instructions, the following default locations are used:

Location	Default Value
Context path	Studio is deployed to the domain's root context.
Liferay Home directory	The Liferay Home directory is `C:\Oracle\Middleware\user_projects\domains`.

To deploy `endeca-portal-weblogic-3.0.x.ear` into the Studio WebLogic domain:

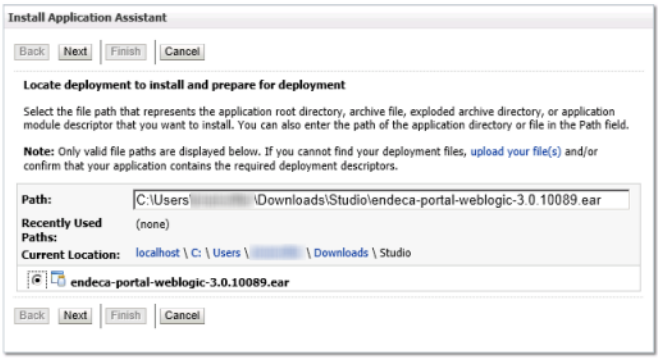
1. Set up the Liferay Home directory (`C:\Oracle\Middleware\user_projects\domains`):
   (a) Extract the file `portal-ext.properties` from the top level of `EID_3.0.x_Studio_portal_weblogic.zip`.
   (b) Place `portal-ext.properties` in the Liferay Home directory.
   (c) In the Liferay Home directory, create the following subdirectories: -
   - `\data\endeca-data-sources`
   - `deploy`
   - `weblogic-deploy`
2. If WebLogic Server isn't already started, then to start it, run the WebLogic Server startup script (`C:\Oracle\Middleware\user_projects\domains\endeca_studio_domain\startWebLogic.cmd`).

   Alternatively, from the Windows **Start** menu, select **Oracle WebLogic>User Projects>endeca_studio_domain>Start Admin Server for Weblogic Server Domain**.
3. Extract `endeca-portal-weblogic-3.0.x.ear` from `EID_3.0.x_Studio_portal_weblogic.zip`.
4. Use the WebLogic Administration Console to deploy `endeca-portal-weblogic-3.0.ear` into the domain.
   (a) Go to the Administration Console at `http://localhost:8101/console`.
   (b) On the login page, log in using the domain administrator user name and password.
   (c) Under **Helpful Tools**, click **Configure applications**.



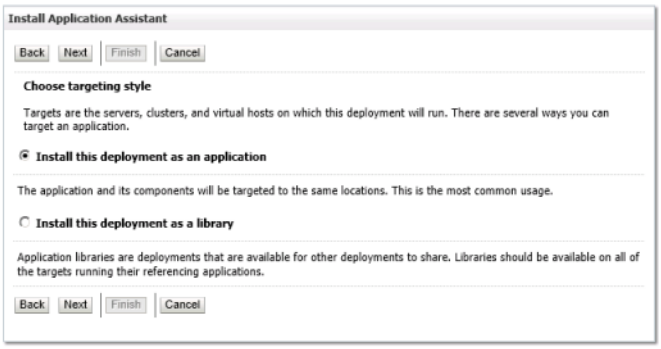
   (d) If necessary, click **Lock & Edit** at the top left of the page.
   (e) Click the **Install** button.

(f) Use the file browser to find the `endeca-portal-weblogic-3.0.x.ear` file, then click the radio button to the left of it.

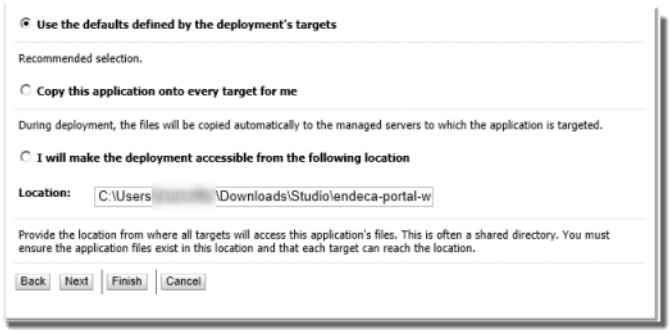


(g) Click **Next**.

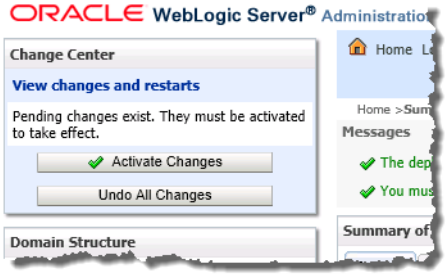
(h) On the next page, under **Choose targeting style**, make sure the **Install this deployment as an application** radio button is selected, then click **Next**.



(i) On the next page, accept the default selections, then click **Finish**.



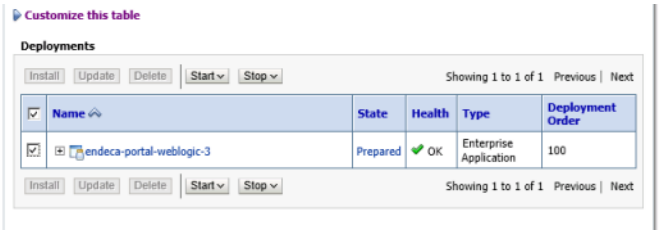
(j) If necessary, click **Activate Changes**.



The deployment may take several minutes. Make sure you do not try to log in to Studio before the deployment is complete.

5. When the deployment process is completed, the deployment status is Prepared. To start the deployment:

(a) In the **Deployments** list, check the checkbox for the Studio deployment.



(b) Click the **Start** button.

(c) From the drop-down list, select **Servicing all requests**.

(d) Under **Start Deployments**, click **Yes**.

6. To verify that Studio has deployed successfully, in a Web browser, go to `http://localhost:8101`.

You should see the Studio login page.

Installing the Provisioning Service

For the Provisioning Service, you use its domain template to create the WebLogic domain, then update the configuration.

Creating the WebLogic domain for and installing the Provisioning Service

Configuring the Provisioning Service

Verifying the Provisioning Service deployment

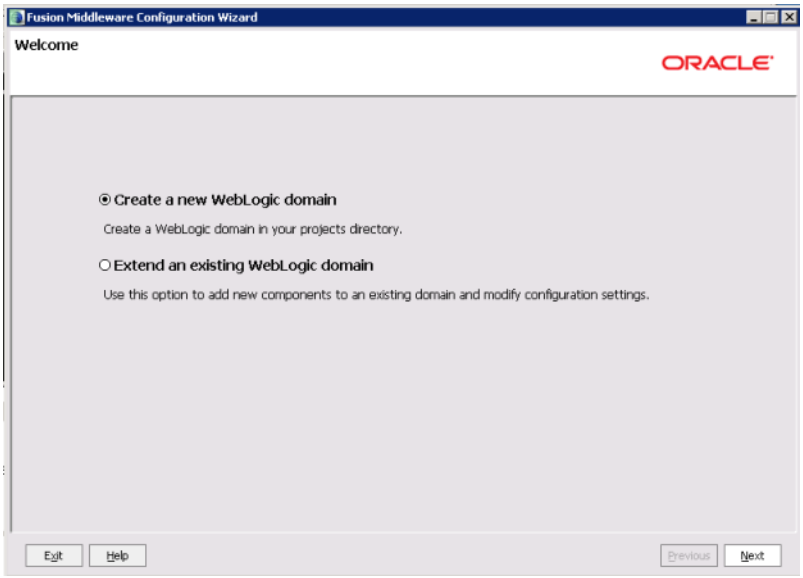
Configuring the Studio connection to the Provisioning Service

Creating the WebLogic domain for and installing the Provisioning Service

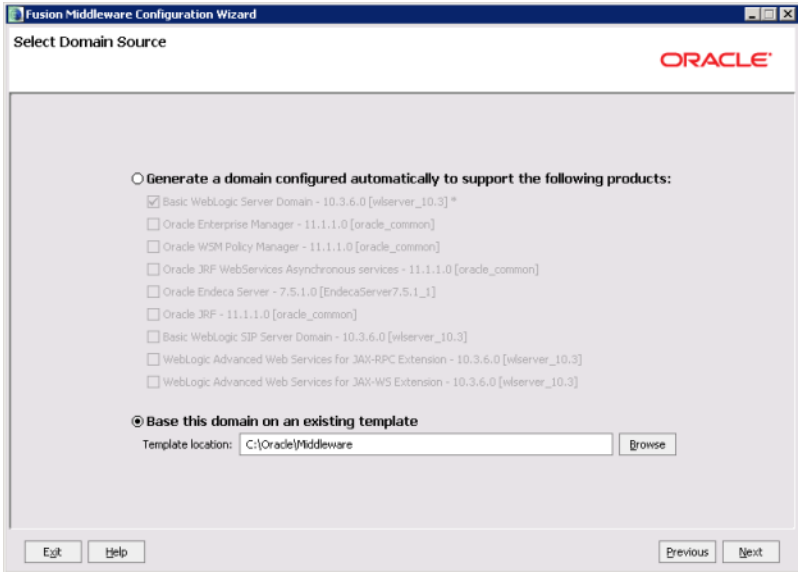
You use the Provisioning Service domain template to create the WebLogic domain for and install the Provisioning Service.

To create the WebLogic domain and install the Provisioning Service:

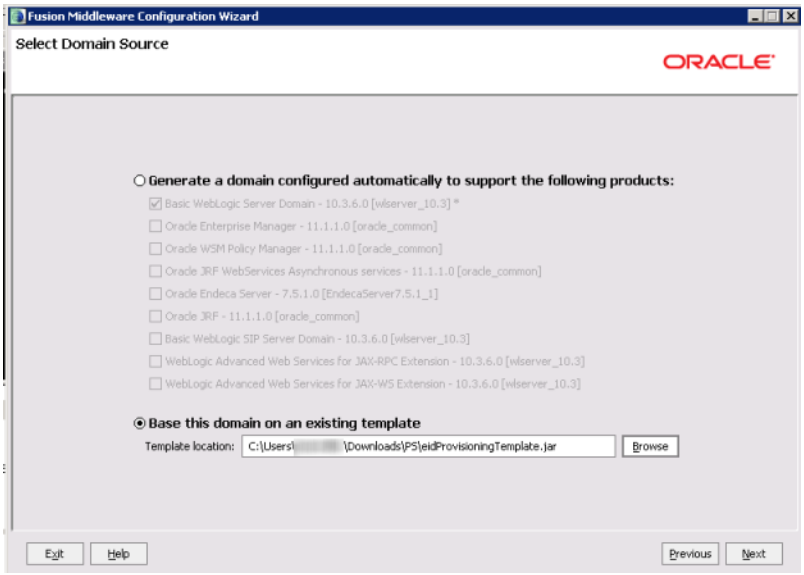
1. Unzip the Provisioning Service .zip file into a temporary directory.
2. From a command prompt, change to the directory that contains the Configuration Wizard start-up program:
   ```
   C:\Oracle\Middleware\wlserver_10.3\common\bin
   ```
3. To start the Configuration Wizard, run the following command:
   ```
   config.cmd
   ```
   The Configuration Wizard **Welcome** page is displayed.
4. On the **Welcome** page, select **Create a new WebLogic domain**, then click **Next**.



5. On the **Select Domain Source** page:
   (a) Click the **Base this domain on an existing template** radio button.



   (b) Click the Browse button, and then browse to the directory where you unzipped the Provisioning Service installation package.
   (c) Select the file `eidProvisioningTemplate.jar`.



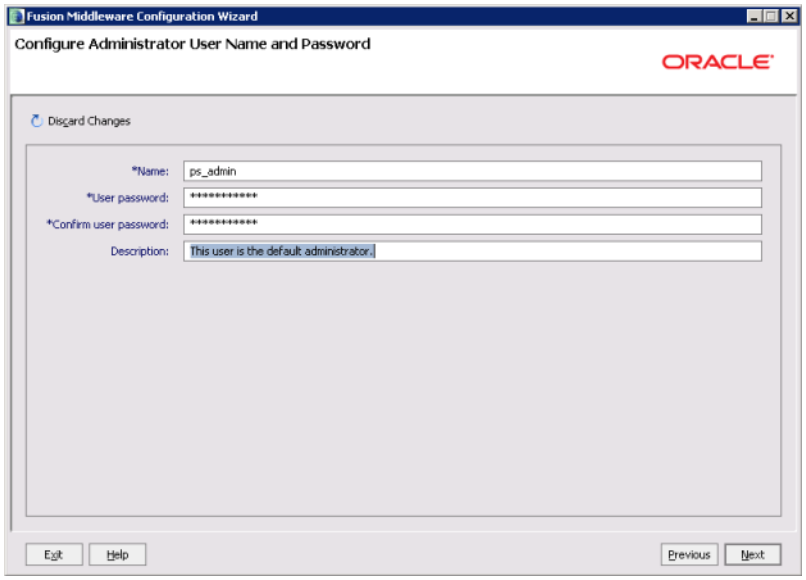
   (d) After selecting the file, click **Next**.

6. On the **Specify Domain Name and Location** page:
   (a) The default domain name is `oracle.eid-ps`.
   (b) Do not change the **Domain location** or **Application location**.
   (c) Click **Next**.

7. On the **Configure Administrator User Name and Password** page, to create the administrator credentials for starting the Provisioning Service domain:
   (a) In the **Name** field, type the name for the new administrator user.
   (b) In the **User password** field, type the user password.

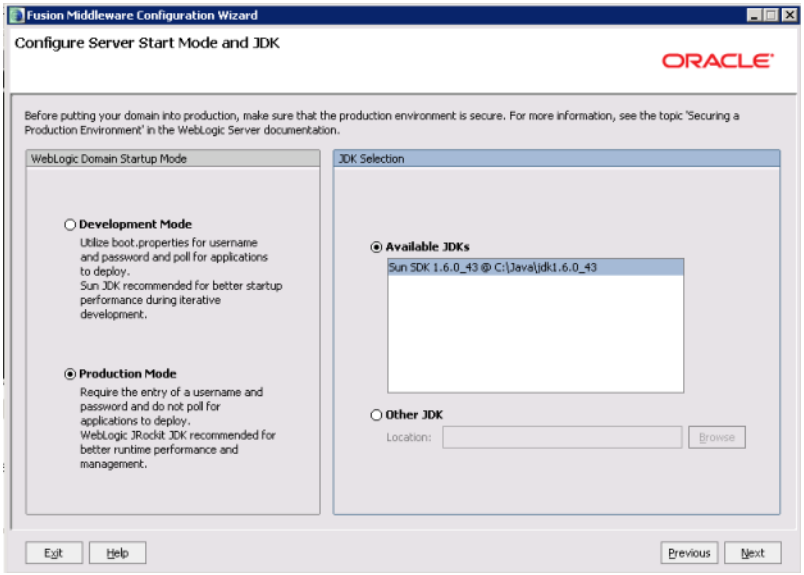
   The password must be at least eight alphanumeric characters long and contain at least one number or special character.

   (c) In the **Confirm user password** field, retype the password.
   (d) Optionally, in the **Description** field, type a description for the user account.
   (e) Click **Next**.

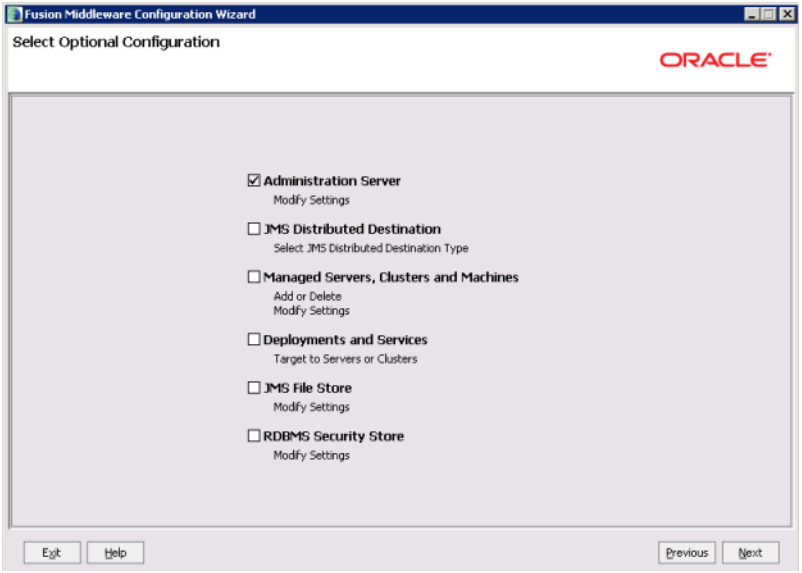


8. On the **Configure Server Start Mode and JDK** page:
   (a) Under **WebLogic Domain Startup Mode**, click the **Production Mode** radio button.
   (b) Under **JDK Selection**, click the **Available JDKs** radio button.
   (c) In the JDK list, click the Sun Java JDK that you installed earlier. If the JDK is not displayed, click the **Other JDK** button, and then browse to it (`C:\Java\jdk1.6.0_43\`).

(d) Click **Next**.

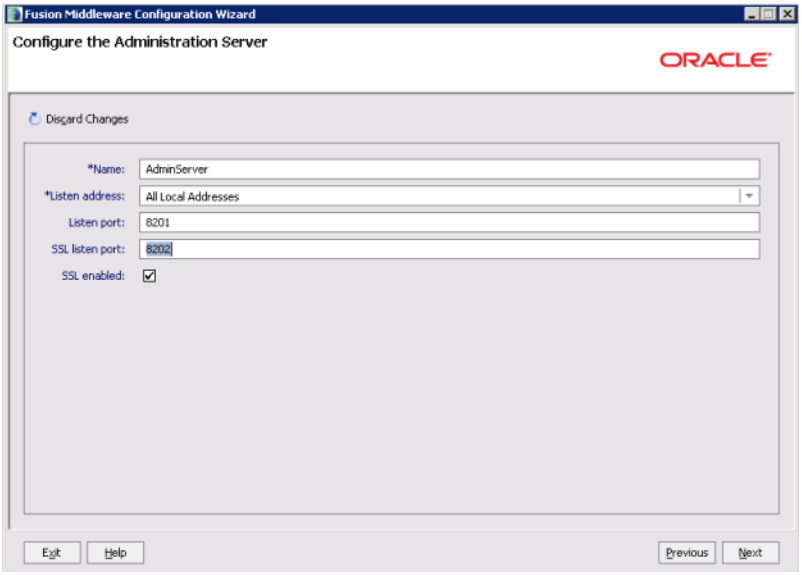


9. On the **Select Optional Configuration** dialog, check **Administration Server**, then click **Next**.

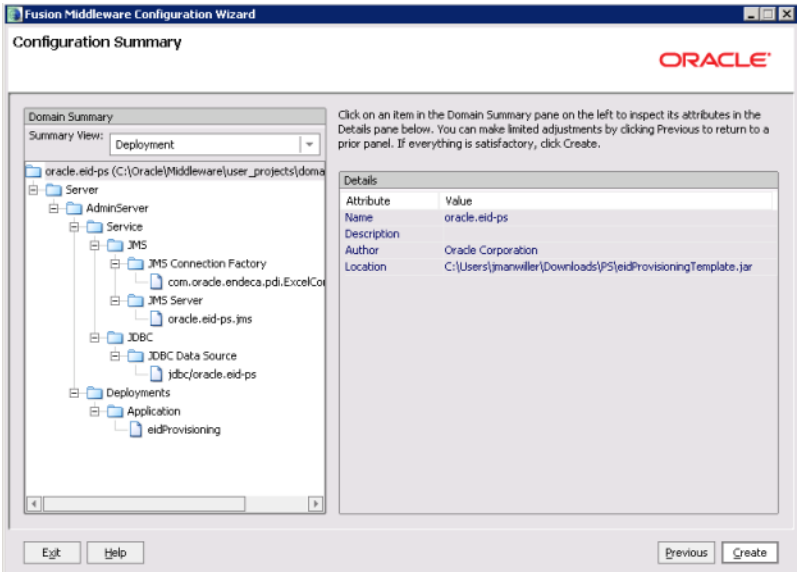


10. On the **Configure the Administration Server** dialog:
    (a) Use the default values for the **Name** and **Listen address** fields.
    (b) In the **Listen port** field, type `8201`.
    (c) In the **SSL listen port** field, type `8202`.

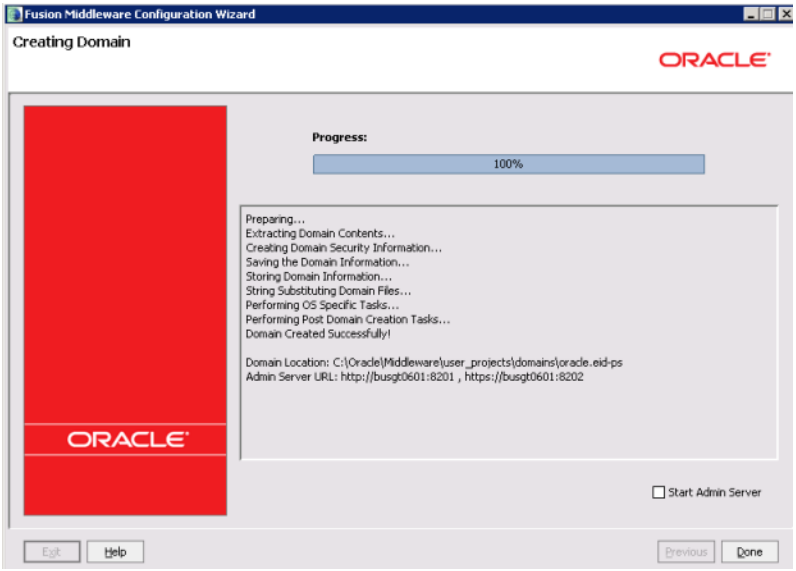
(d) Click **Next**.



11. On the **Configuration Summary** page, to create the domain, click **Create**.



12. On the **Creating Domain** page, the message "Domain Created Successfully!" signifies the end of the create process.



13. To exit the Configuration Wizard, click **Done**.

Configuring the Provisioning Service

Before running the Provisioning Service, you must configure it.

To configure the Provisioning Service, open the file `C:\Oracle\Middleware\user_projects\domains\oracle.eid-ps\eidProvisioningConfig\plan.xml`.

Change the following settings:

Setting	Value
`endeca-server-ws-port`	`7001`
`endeca-server-security-enabled`	`false`
`upload-file-directory`	Optional. If you do not change this setting, the Provisioning Service uses the operating system temporary directory. Because this directory is not very secure, and scripts often modify its contents, it is recommended that you specify a directory. The directory you specify must exist, and the user that runs the Provisioning Service must have write permissions on the directory.
`transport-guarantee`	`NONE`

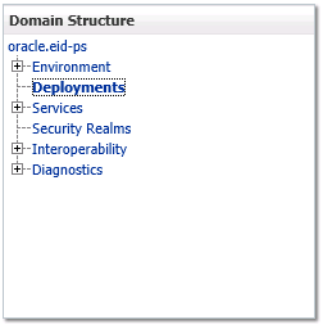
Setting	Value
`protected-url-pattern`	`/DISABLED`

Verifying the Provisioning Service deployment

After you finish installing the Provisioning Service, you can confirm that it runs.

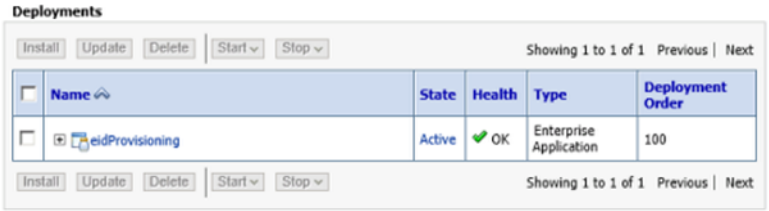
To confirm the Provisioning Service deployment:

1. To start the Admin Server for the Provisioning Service domain, run `C:\Oracle\Middleware\user_projects\domains\ps_domain\startWebLogic.cmd`.
2. When prompted, enter the administrator user name and password for the Provisioning Service domain.
3. From a Web browser, go to the Administration Server console at `http://localhost:8201/console`.
4. In the **Domain Structure** section of the page, click **Deployments**.



5. In the **Deployments** list, check the State and Health of the oracle.eid-ps application.

   The value in the **State** column should be "Active" and the value in the **Health** column should be "OK".



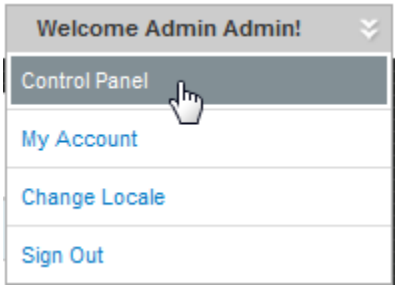
Configuring the Studio connection to the Provisioning Service

In order to be able to create Studio applications via file upload, you must configure the connection from Studio to the Provisioning Service.

To configure the Provisioning Service connection from Studio:

1. Log in to Studio.

2. From the Studio menu, select **Control Panel**.



3. In the **Control Panel** menu, under **Information Discovery**, click **Provisioning Service**.
4. On the **Provisioning Service** page, edit the connection string to:
   - Change the server name to `localhost`.
   - Change the port number to `8201`.
   - Remove the `sslConfig` section.

   When you finish, the connection string should look like:

```
{
  "port": "8201",
  "server": "localhost"
}
```

5. Click **Save**.

   Studio saves and validates the connection information.

Chapter 3

Provisioning the Getting Started Application

To provision the Getting Started application, you run the Integrator Getting Started project pipeline to create an Endeca data source, then load the sample application into Studio.

About the Getting Started package

Downloading the Getting Started package

Loading the Getting Started data

Starting Studio and importing the Getting Started application

About the Getting Started package

The Getting Started package allows you to create the Getting Started application, which demonstrates Information Discovery in action, using sales and product data from a fictitious bicycle manufacturer.

It allows you to get experience using Integrator to ingest data, and using Studio to create and use Studio applications.

The Getting Started package consists of a data pipeline processed by Integrator, a LAR file used by Studio, and this guide.

Downloading the Getting Started package

The Getting Started package is available from the Oracle Endeca Information Discovery edelivery site.

To download the Getting Started package:

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 Windows.
   (c) Click **Go**.

   The list of media packs for the selected product and platform is displayed.
4. In the media pack list, click **Oracle Endeca Information Discovery Studio (3.0) Media Pack v1 for Microsoft Windows x64 (64-bit)**.

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

5. From the **Download** page, download the **Oracle Endeca Information Discovery Sample Application (3.0) for Microsoft Windows x64 (64-bit)**.
6. Extract the files from the .zip file to a temporary directory.

   The downloaded file contains:

File	Description
`EID_3.0_SamplePipeline.zip`	The Integrator data pipeline for the sample application.
`EID_3.0_SampleApp.lar`	The sample application for Studio.
`EID_3.0_GettingStarted.pdf`	A copy of this *Getting Started Guide*.

Loading the Getting Started data

You import and load the Getting Started application data using Integrator.

Starting Integrator

Loading the Getting Started data pipeline

Running the pipeline project

Starting Integrator

In order to run the Getting Started project pipeline, you must launch Integrator.

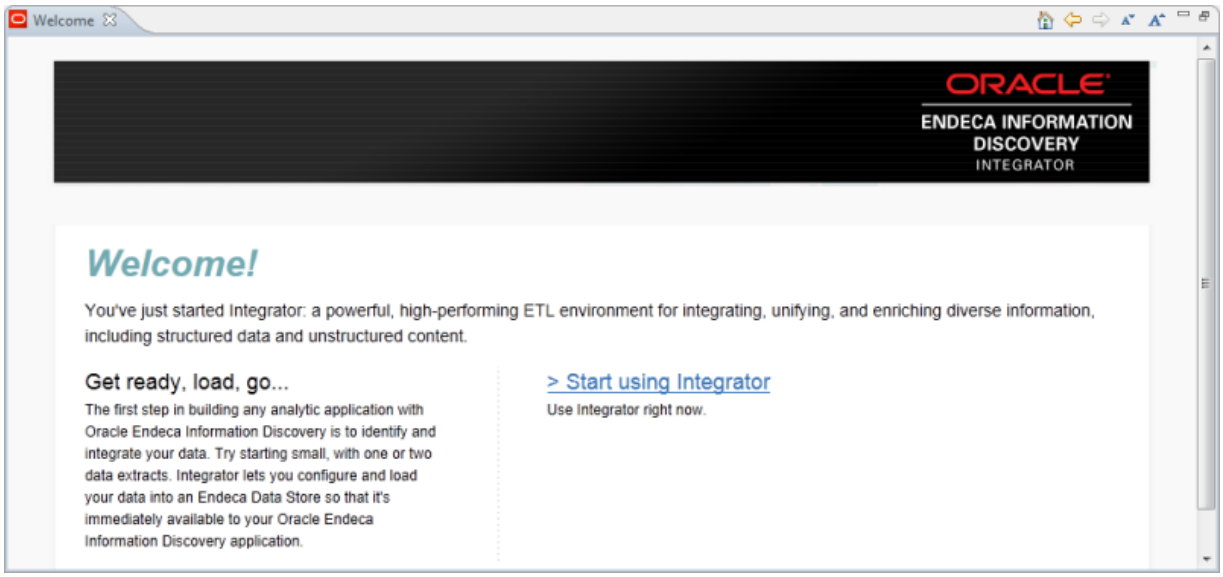
To start Integrator:

1. Choose **Start>All Programs>Oracle Endeca Information Discovery 3.0.0>Integrator**.

   The Integrator splash screen displays first, followed by the **Workspace Launcher** dialog box.
2. Click **OK** to accept the default workspace location, or click **Browse** to select another location.

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

3. The first time you launch Integrator, the Welcome screen displays, as pictured. Click **Start using Integrator**.



Note: If you want to return to this Welcome screen at any point while you are in the Integrator workspace, choose **Help>Welcome**.

Loading the Getting Started data pipeline

Next, you import the Getting Started data pipeline into Integrator.

The Getting Started data pipeline is contained in the `EID_3.0_SamplePipeline.zip`, which is part of the sample application .zip file that you downloaded.

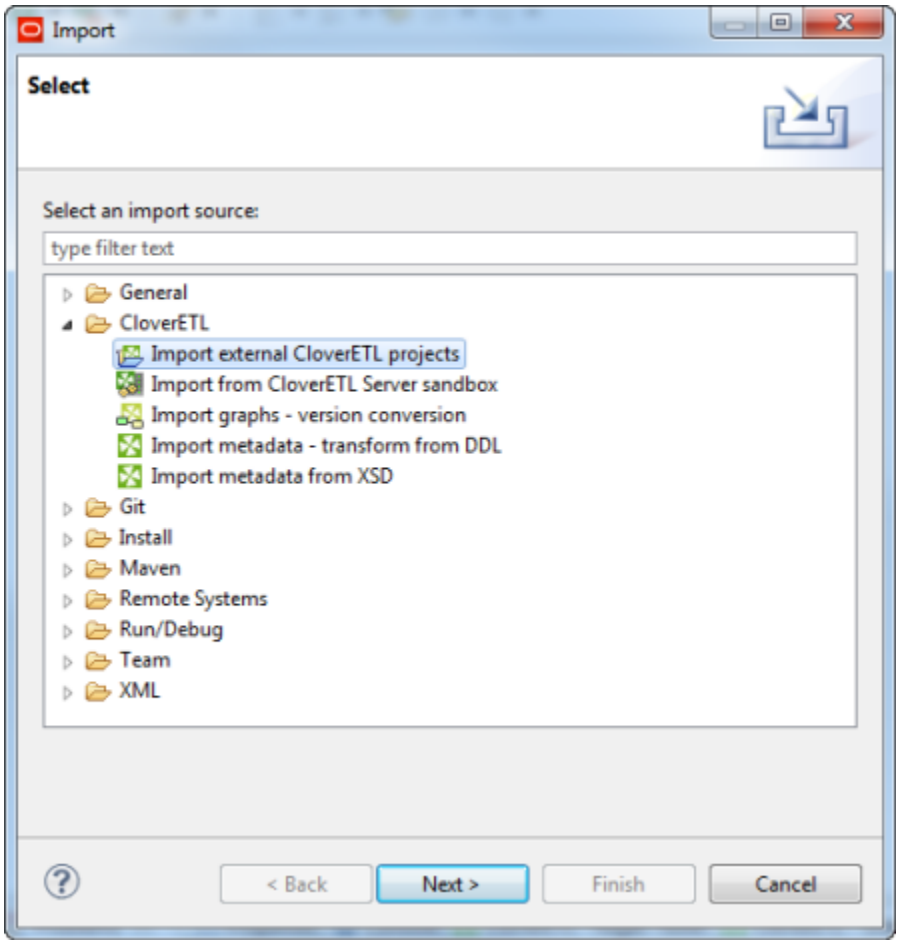
To import the Getting Started data pipeline:

1. From the **File** menu, select **Import**.

   The **Import** wizard opens.

2. On the **Select** page:
   (a) Open the **Clover ETL** folder.
   (b) Select **Import external Clover ETL projects**.

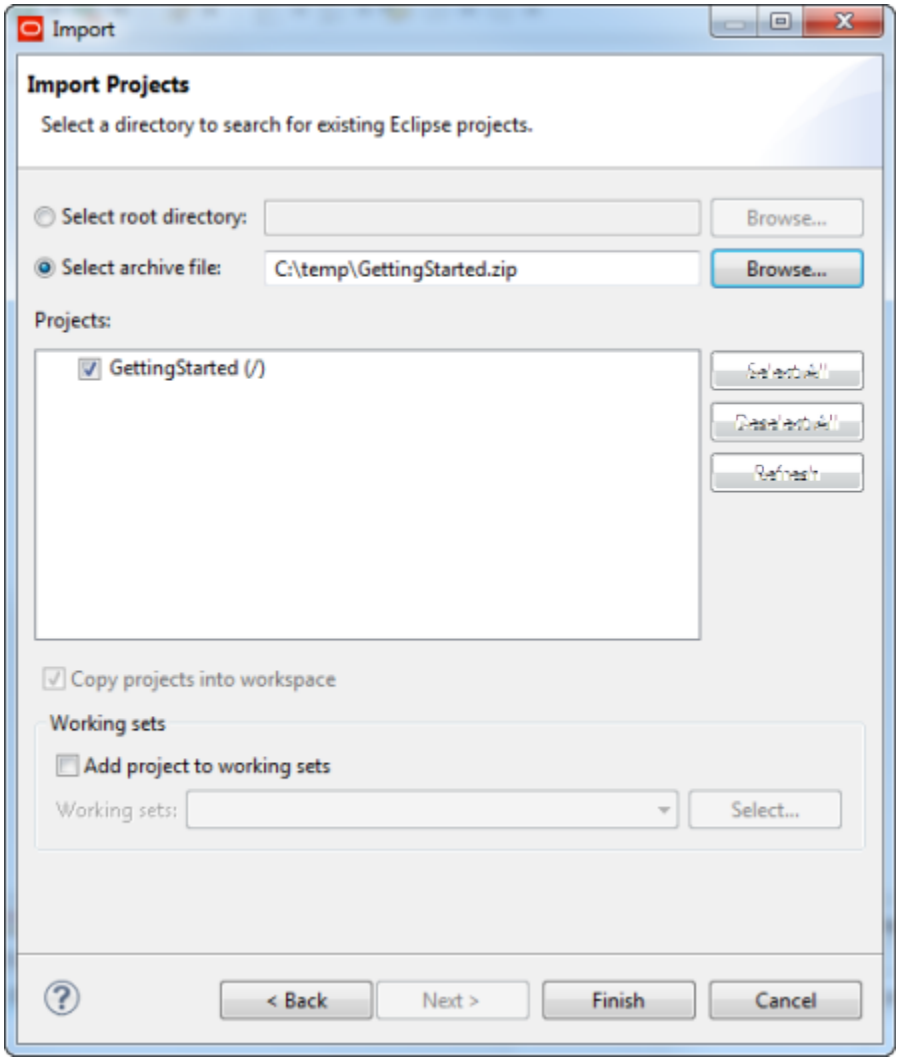
(c) Click **Next**.



3. On the **Import Projects** page:
   (a) Click the **Select archive file** radio button.

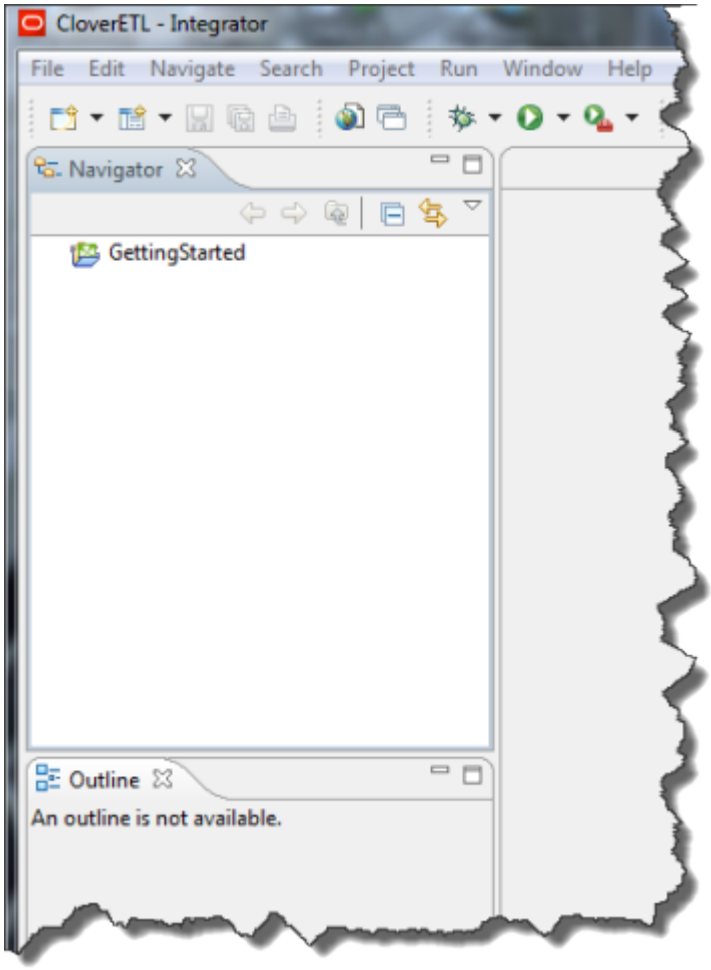
(b) Use the **Browse** button to navigate to and select `EID_3.0_SamplePipeline.zip`.

The Getting Started project appears in the **Projects** list.



4. Click **Finish**.

   The Getting Started project now appears in the Integrator Navigator.



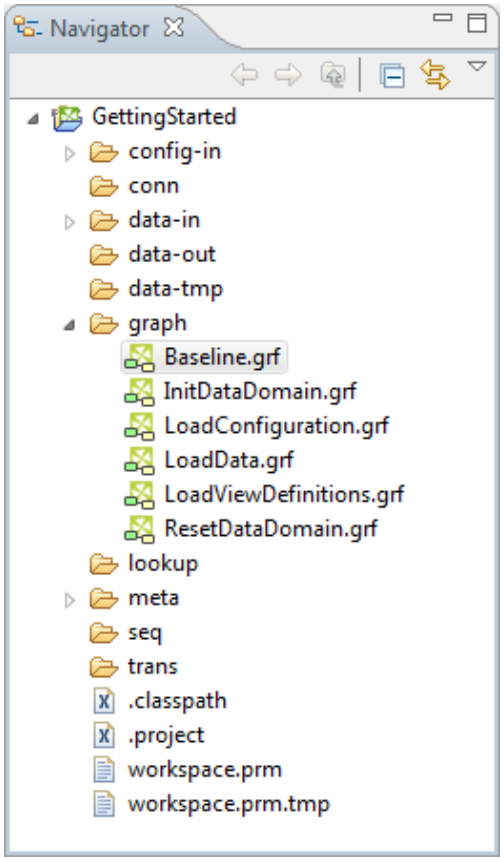
Running the pipeline project

After you load the Getting Started pipeline project, you then run the pipeline in order to load the data.

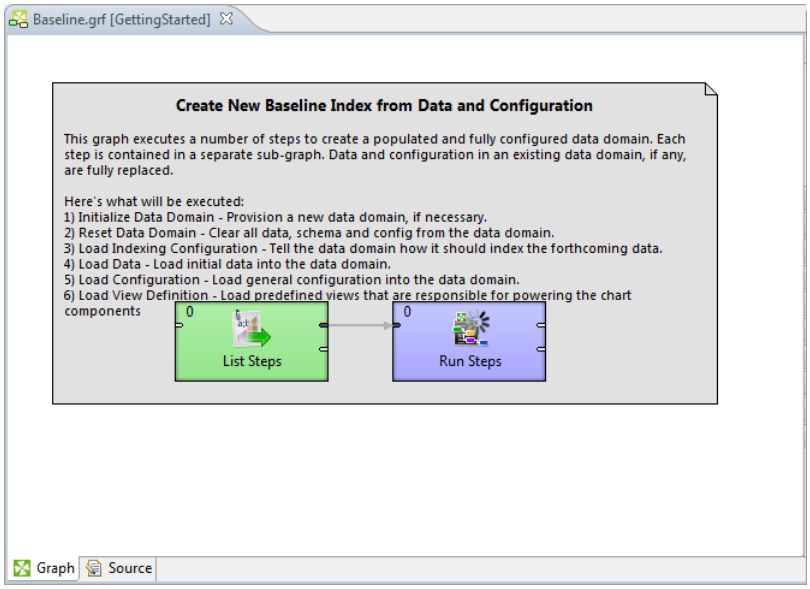
Important: In order to process the pipeline, Endeca Server must be running. For details, see the *Oracle Endeca Server Administrator's Guide.*

To run the pipeline project:

1. In the Navigator, in the **GettingStarted** folder, navigate to the **graph** folder.



2. In the **graph** folder, double-click `Baseline.grf` to launch it.



Make sure `Baseline.grf` is open in Integrator, as pictured, and that the `GettingStarted` project appears in the **Navigator** pane.

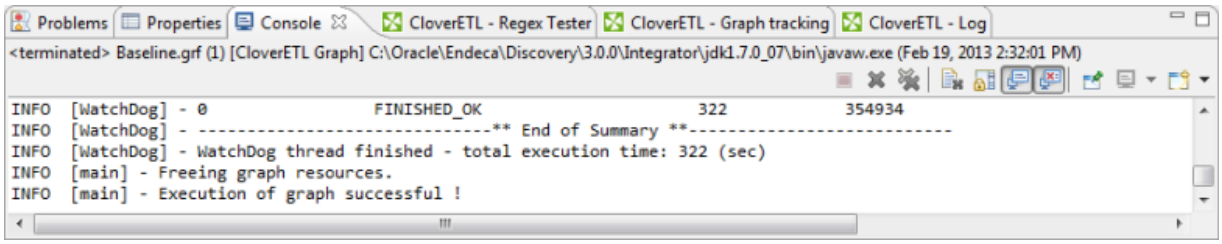
3. To start the graph process:
   (a) Click anywhere in the Baseline graph's gray box.

   The box is given focus (indicated by a black line around the box).

   (b) Click **Run** .

   Integrator processes `Baseline.grf`, which initializes a new, empty Endeca data domain instance (named `GettingStarted`) and loads the data and configuration for the Getting Started 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.



4. When the graph processing completes, exit Integrator.

Starting Studio and importing the Getting Started application

Now that the data and configuration is loaded into your Getting Started data domain, you can run Studio and import the Getting Started application.

Starting Studio

Connecting to the Getting Started data domain

Creating an empty Studio application

Importing the Getting Started application

Starting Studio

Before you can explore the sample application, you must start the Studio server and log in to Studio.

Important: The Studio **Chart** component requires Adobe Flash Player 10.0 or greater. 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 Studio.

To start Studio:

1. Start the Studio WebLogic domain.

2. Once the server is started, open a browser and go to `http://localhost:8101`.

   The Studio login page opens in the browser window.

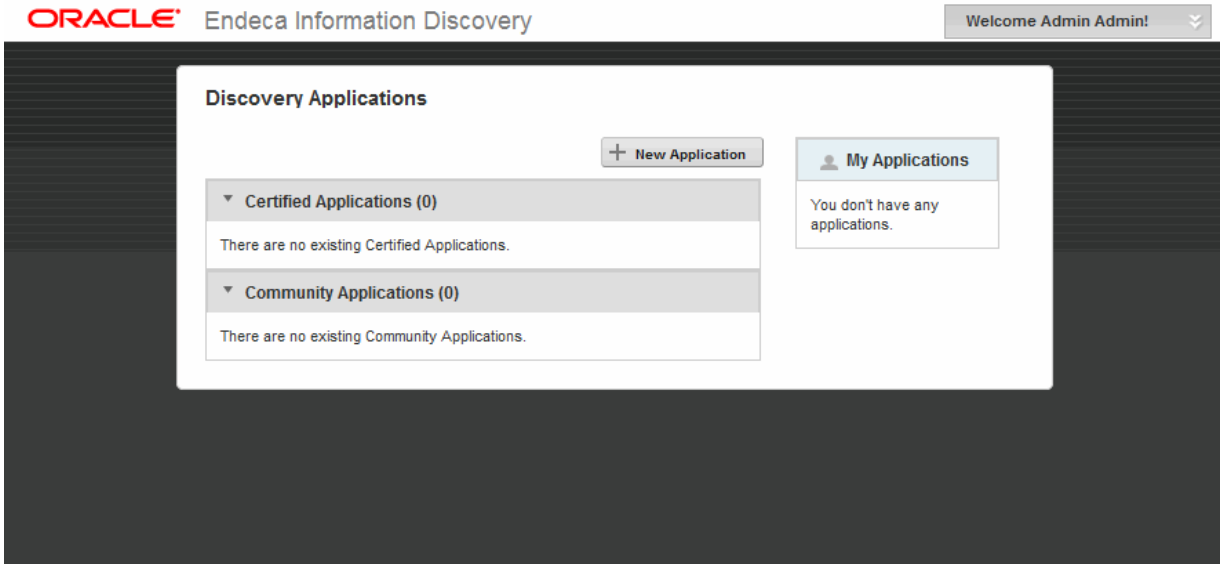
3. Log in to Studio using the default login and password:

Email Address:	admin@oracle.com
Password:	Welcome123

You are immediately prompted to change the password upon first use. The new password must contain:

- At least 6 characters
- At least one non-alphabetic character

After you change your password, Studio displays the **Discovery Applications** page:

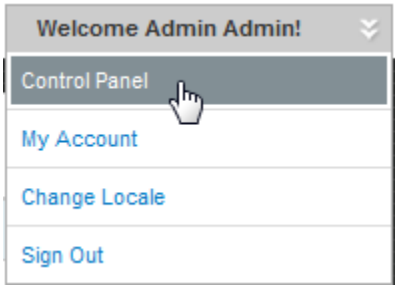


Connecting to the Getting Started data domain

Next, you update the default Studio data source to connect to the Getting Started data domain that you created when you ran the baseline graph in Integrator.

To connect to the Getting Started data domain:

1. From the Studio menu, choose **Control Panel**.



2. In the **Control Panel** menu, in the **Information Discovery** section, click **Data Sources**.
3. For the default data source, click **Edit**.
4. On the **Data Source Definition** dialog, edit the JSON string as follows:

```
{
  "dataDomainName": "GettingStarted",
  "name": "GettingStarted",
  "port": "7001",
  "server": "localhost"
}
```

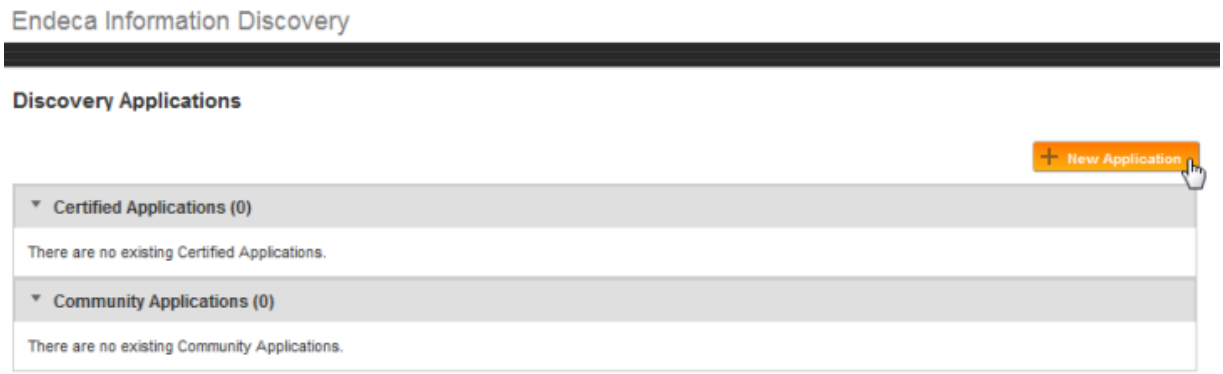
5. Click **Save**.
6. To return to the **Discovery Applications** page, click **Back to Home**.

Creating an empty Studio application

Next, you create an empty Studio application, into which you can import the Getting Started project.

To create an empty Getting Started application:

1. On the **Discovery Applications** page, click **New Application**.



The **New Discovery Application** page is displayed.

2. In the **Application name** field, type **GettingStarted**.
3. Leave the application description blank.
4. From the **Data source** drop-down list, select **GettingStarted**.

5. Click **Create Application**.
6. On the **New Discovery Application** page, click **Go to Application**.

An initial view of the **GettingStarted** application opens. However, before you can start using it, you must import the sample project LAR file.

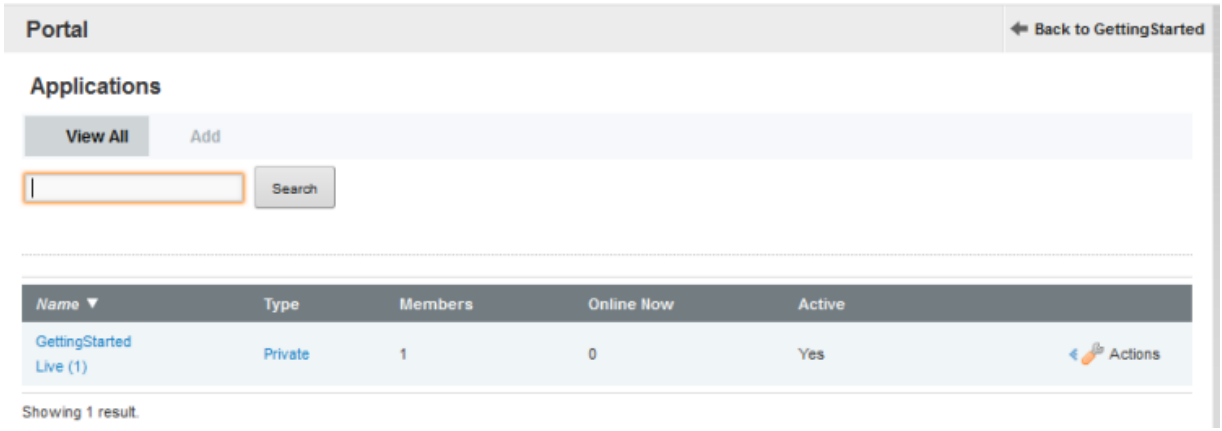
Importing the Getting Started application

Before you can begin exploring the Getting Started application, you must import it into Studio.

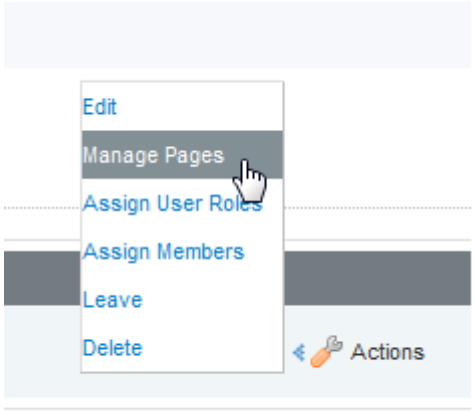
To import the Getting Started application:

1. From the Studio menu, select **Control Panel**.

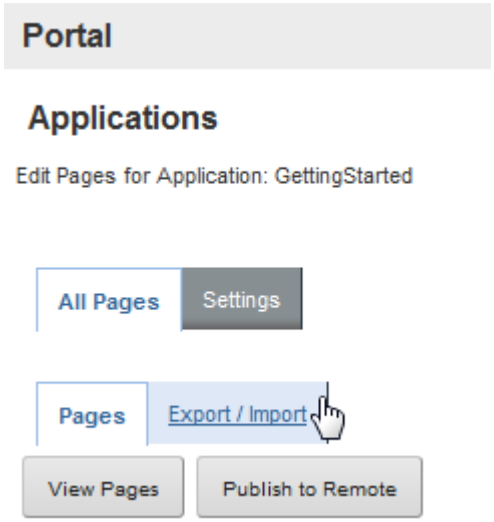
2. In the **Control Panel** menu, in the **Portal** section, click **Applications**.



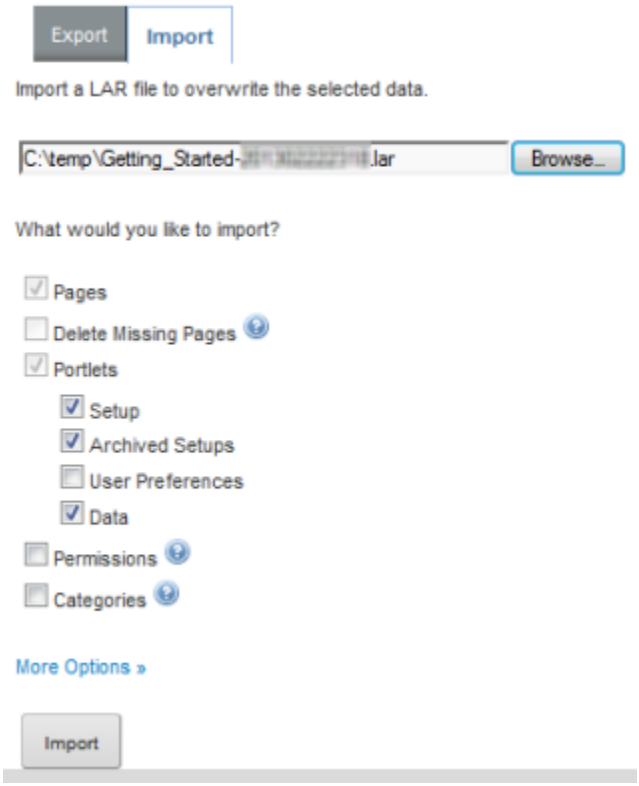
3. On the **Applications** page, for the GettingStarted application, click **Actions**, and then click **Manage Pages**.



4. Click **Export/Import**.



5. Click **Import** and do the following:
   (a) In the **Import a LAR file to overwrite the selected data** field, browse to the GettingStarted LAR file you downloaded.
   (b) Under **What would you like to import?**, accept the default settings, and then click **Import**.



   Upon completion, you will see a success message.

6. Click **Back to GettingStarted**.

   The full Getting Started application, containing three new pages (**Sales Overview**, **Resellers**, and **Products**) is now available.

Chapter 4

Exploring the Getting Started Application

Now that you have loaded the Getting Started application, you can explore it in Studio.

About the Getting Started application

Navigating to the Getting Started application

Overview of the Getting Started application pages

About the Getting Started application

The Getting Started application demonstrates Studio in action, using sales and product data from a fictitious bicycle manufacturer.

Customers can rapidly and iteratively deploy applications similar to the Getting Started 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 its patented search and Guided Navigation™ technology, Studio provides visibility and better decision-making capabilities to a broad range of business users.

To experience Studio, use the Getting Started application to analyze the performance of resellers and products across a wide variety of dimensional attributes.

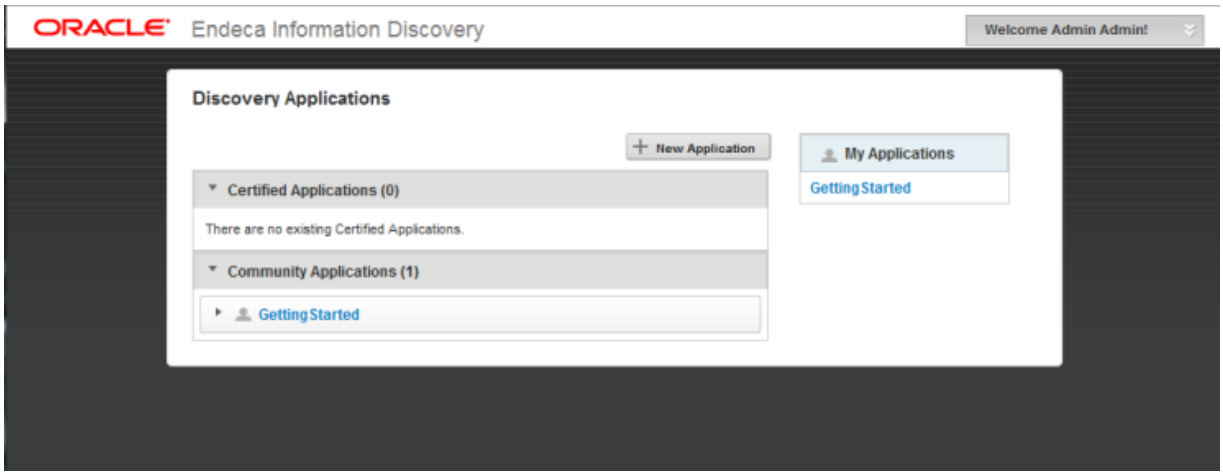
Navigating to the Getting Started application

Once you have created and imported the Getting Started Application, you can always navigate to it from the **Discovery Applications** page.

To display the Getting Started application:

1. Launch and log in to Studio.

2. In the **Community Applications** section, click **Getting Started**.

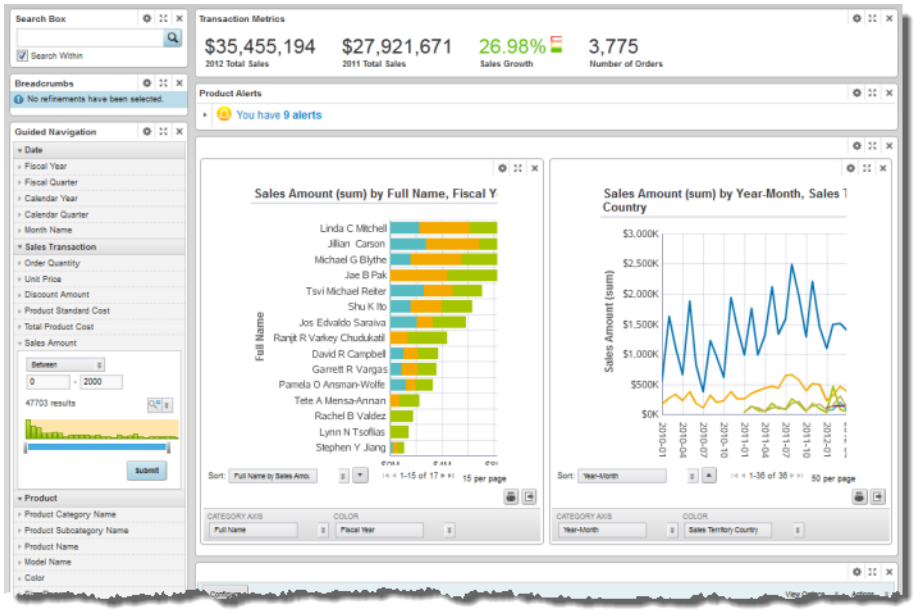


The Getting Started application is displayed.

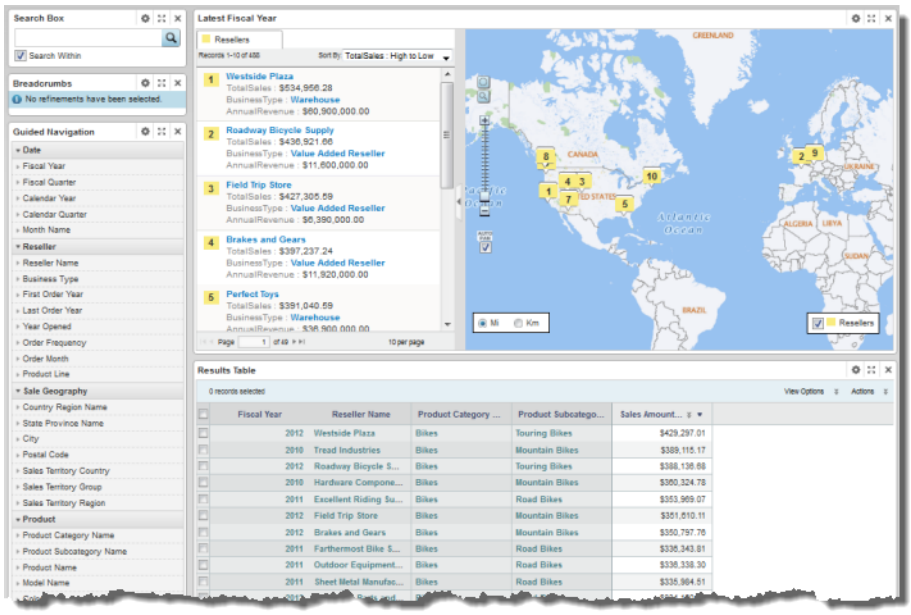
Overview of the Getting Started application pages

The pages in the Getting Started application all use the same sales and product data from a fictitious bicycle manufacturer. Each page focuses on a different aspect of the data.

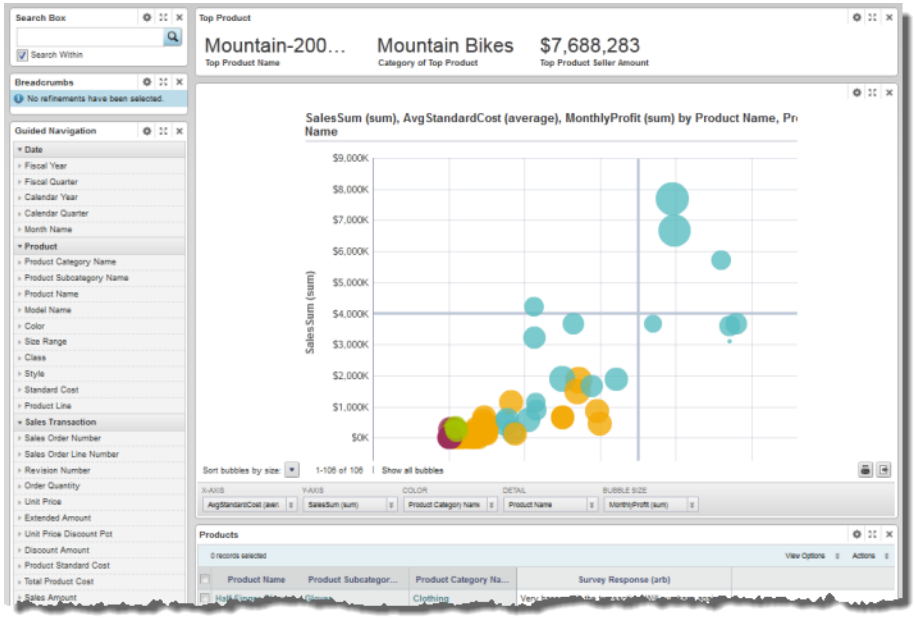
The **Sales Overview** page provides a dashboard to view and explore overall sales figures.



The **Resellers** page provides details associated with the resellers for the sales transactions, and includes a map of the reseller locations.



The **Products** page allows users to view and explore the sales records in the context of the products that were sold.



Chapter 5

Next Steps

After you explore the Getting Started application, here are the next steps you can take with Oracle Endeca Information Discovery.

Obtaining more information

Uninstalling Oracle Endeca Information Discovery

Obtaining more information

Here are some additional resources that can help you be successful with Oracle Endeca Information Discovery.

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 guides to find more specific in-depth information:

If you are...	**See this guide...**
Any user who needs to learn more about terminology related to Oracle Endeca Information Discovery Studio, Oracle Endeca Information Discovery Integrator, or Oracle Endeca Server	The *Oracle Endeca Information Discovery Glossary* contains definitions for related modules, concepts, and terms.
An administrator who needs to install Oracle Endeca Information Discovery, or learn about system requirements or platform support	The following installation guides contain platform support information and detailed installation instructions for all currently supported installation environments: • *Oracle Endeca Server Installation Guide* • *Oracle Endeca Information Discovery Integrator Installation Guide* • *Oracle Endeca Information Discovery Studio Installation Guide* • *Oracle Endeca Information Discovery Integrator Acquisition System Installation Guide*

If you are...	See this guide...
An administrator who needs to know how to administer and maintain Oracle Endeca Server and Oracle Endeca Information Discovery Studio	The *Oracle Endeca Server Administrator's Guide* provides information about various administrative tasks associated with the Oracle Endeca Server. The *Oracle Endeca Server Cluster Guide* provides information about using the Endeca Server cluster for hosting one or more data domains. The *Oracle Endeca Information Discovery Studio Administration and Customization Guide* provides information about administrative tasks associated with Studio. The *Oracle Endeca Information Discovery Studio Provisioning Service Administration Guide* provides information about administrative tasks associated with the Provisioning Service.
An administrator who needs to secure Oracle Endeca Information Discovery.	The following guides contain security information: • *Oracle Endeca Server Security Guide* • *Oracle Endeca Information Discovery Integrator Security Guide* • *Oracle Endeca Information Discovery Studio Security Guide* **Important:** While security is not required by this sample application, in real-world scenarios, Oracle recommends that you install and run Oracle Endeca Information Discovery securely.
An ETL developer or data architect who needs to load data into Oracle Endeca Server	The *Oracle Endeca Information Discovery Integrator User's Guide* describes how to load data. In addition, the *Oracle Endeca Server Data Loading Guide* describes the Data Ingest Web Service API used by Integrator.
A developer who needs to know about features of the Oracle Endeca Server such as search, refinements, search interfaces, or thesaurus	The *Oracle Endeca Server Developer's Guide* describes the core features of the Oracle Endeca Server that you can access via applications built with Studio. It covers basic concepts, working with records and attributes, and search configuration.
An application developer who needs to configure the behavior of various components in Studio	The *Oracle Endeca Information Discovery Studio User's Guide* describes how to configure the Studio framework and components.
A developer who needs to know about the APIs for the Oracle Endeca Server	The *Oracle Endeca Server Developer's Guide* describes the Oracle Endeca Server Web Services used by Studio. In addition, see the *API Reference* for information about Web services and schemas that are packaged with the Oracle Endeca Server. It is located in the `doc/wsdl` and `doc/xsd` directories of the Oracle Endeca Server installation.

If you are...	See this guide...
A developer who needs to know how to extend Studio	The *Oracle Endeca Information Discovery Studio Administration and Customization Guide* provides information on how to extend Studio. For additional information about extending Information Discovery Studio, see the Studio Javadoc, which is packaged with the rest of the Studio documentation.

To access the Oracle Endeca Information Discovery documentation, go to the *Oracle documentation library*.

User Forums

The Oracle forums include an *Information Discovery forum*. You can use this forum to post questions and view information from other users and experts.

You should also visit the OTN (Oracle Technology Network) Product Page: *http://www.oracle.com/technetwork/middleware/endeca/overview*. This page contains other useful content for someone getting up to speed, including videos and best practices.

Education and Training

Oracle offers training courses on configuring and using Oracle Endeca Information Discovery.

For information on available courses, see the *Oracle University site*.

Uninstalling Oracle Endeca Information Discovery

After you have finished exploring the sample application, you may want to uninstall it from your machine.

For information about uninstalling Oracle Endeca components, see the corresponding installation guide:

- *Oracle Endeca Server Installation Guide*
- *Oracle Endeca Information Discovery Integrator Installation Guide*
- *Oracle Endeca Information Discovery Studio Installation Guide*

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